

Sales Contract

Module Guide: Sales Contract

Module Location

Sales > Sales Contract > Sales Contract

Module Objective

The **Sales Contract** module is used to create, manage, and track long-term sales agreement documents with customers. Unlike single transactions, this contract defines the agreed-upon terms, products, and prices that will apply to all sales orders during the contract period.

1. Main View (Contract List)

The main page of this module displays a list of all Sales Contract documents that have been created.

The screenshot shows the main view of the Sales Contract module. At the top, there is a breadcrumb trail: Sales | Sales Contract | Sales Contract. Below this, there are several filter fields: Contract Number (with a dropdown menu), Any Part of Field (with a dropdown menu), and NONE (with a dropdown menu). There are Search and Show All buttons. Below these, there are fields for Item Category (FINISHED GOOD), Status (All), Date From (1 August 2025), and Date To (31 August 2025). There are also Document Filter Status and Approval Filter Status buttons. At the bottom, there is a table with columns: No., Contract Number, Customer Name, Quotation Number, Document Status, Approval Status, Contract Start Date, End Date, Attachment File, and Status. The table is currently empty, and there is a message: ...: No Record Found :... Below the table, there are buttons for New, Print, Change Status, and ERPReminder.

View Explanation & Filters

This page is for viewing and managing all existing sales contracts.

- **Filters:** You can search for a specific contract by **Contract Number**, **Item Category**, **Status**, or a date range (**Date From / Date To**).

- **Contract List:** The table below will display all contracts that match the filters, with columns such as **Contract Number**, **Customer Name**, **Contract Start Date**, **End Date**, and **Approval Status**.

Button Functions

- **New:** The primary button to create a new Sales Contract.
- **Print:** To print the details of a selected contract.
- **Change Status:** To change the status of a selected contract.
- **FBill Reminder:** Likely functions to send a billing reminder related to the contract.

2. Steps to Create a Sales Contract

Step 1: Create a New Contract



From the Main View, click the **New** button to open the **Add Sales Contract** form. 

Step 2: Fill in Contract Header Information

On the form that appears, fill in the general information and terms of the contract:

- **Basic Information:** Select the **Customer**, and fill in important dates such as **Sales Contract Date**, **Contract Start Date**, and **End Date**.

Sales Contract Date : 
Customer :

Contract Start Date : 
End Date : 

- **Reference:** You can link it to an existing quotation by selecting the **Quotation Number**.

Quotation Number :

- **Important Terms:** Fill in key terms such as **Maximum Sales Amount** and the details in **Terms and Condition**.

Maximum Sales Amount : Terms and Condition :

Step 3: Detail the Contract Items and Prices

In the detail table at the bottom, list all the products included in the contract:

1. Fill in the **Item Code** and **Qty** (Quantity) as agreed.
2. Fill in the **Unit Price** and **Discount (%)** that have been agreed upon and will remain fixed for the duration of the contract.

Step 4: Save and Confirm

After all data is filled in, use the buttons in the bottom-left section:

- **Save:** To save the contract as a draft.
- **Confirm:** To finalize and send the contract into the approval workflow.
- **Cancel:** To cancel the entry.

Tips & Important Notes

- An active Sales Contract will become the reference for prices and terms for **Sales Orders** created for that customer during the contract period.
- Use the **Maximum Sales Amount** field to control that the total sales under this contract do not exceed the agreed-upon value.
- A document that has been **Confirmed** will likely go to a **Sales Contract Inbox** for an approval process by management.

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