Sales Contract

Module Guide: Sales Contract

Module Location

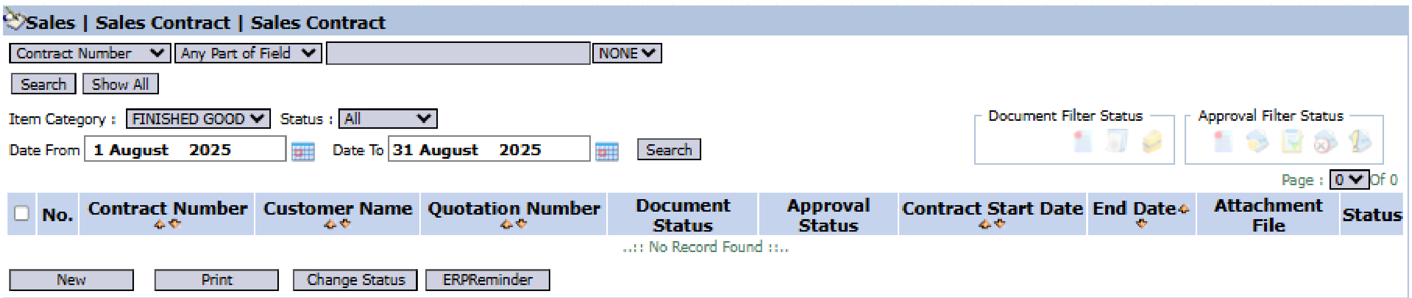
Sales > Sales Contract > Sales Contract

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.



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

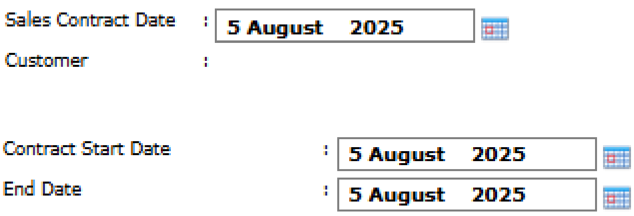
Step 1: Create a New Contract

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

Step 2: Fill in Contract Header Information

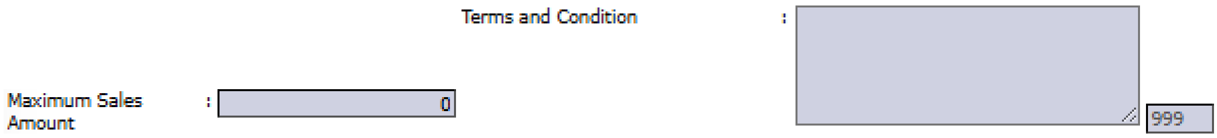
On the form that appears, fill in the general information and terms of the contract:

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



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

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

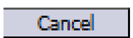
2. Fill in the **Unit Price** and **Discount (%)** that have been agreed upon and will remain fixed for the duration of the contract.

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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