

Contracts

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1 Contracts

This screen allows you to maintain the contracts in the system. Contracts are created between the **Organisation** and **Carriers** or **Customer** to control finance options.

You can query data by and/or choose to display data as follows:




- *Code.*
- *Name.*
- *Type Code* - the contract type, defining the type of counter party.
- *Local Party Code* - the organisation to whom the contract pertains.
- *Counter Party Code* - the carrier or customer to whom the contract pertains.
- *Currency Code.*
- *Effectivity Date From.*
- *Effectivity Date To.*
- *Active.*
- *Created By.*
- *Created Date.*
- *Last Updated By.*
- *Last Updated Date.*
- *Last Active Change By.*
- *Last Active Change Date.*
- *Last Process Id.*
- *Update Counter.*

The following actions are available on the Details panel:

-  **New** - create a new record.
-  **Save** - save a new record or changes to an existing record.
-  **Delete** - delete an existing record.
-  **Help** - help on this screen.
-  **Undo** - undo change made since last save.
-  **Clear** - clear all fields.
-  **Toggle** - toggle display of all accordion headers.

You can change or add the following information:


1.1 Details section




- *Code* - the contract code.
- *Name* - the contract name.
- *Type Code* - the contract type, defining the type of counter party. You can maintain the values in the **Contract Type** screen.
- *Organisation* - a drop-down list of organisations to select the organisation to whom the contract pertains. You can maintain the values in the **Organisation** screen.
- *Counter Party Code* - the customer or carrier to whom the contract pertains. This will be labelled as "Customer Code" or "Carrier Code" depending on your selection of Type Code above. You can maintain the values in the **Customer** and **Carriers** screens respectively. You can enter the customer or carrier code, or look up the code by clicking the  **Lookup** button to the right of the value entry. The screen will display a pop-up window of carriers or customers. You can select a code by clicking on the row or cancel entry by closing the window.
- *Currency Code* - a drop-down list of all currencies in the system. You can maintain the values in the **Currencies** screen.
- *Effectivity Date From* - the date from which the contract is effective. You can enter the date directly or use a  **Calendar** pop-up to select the date.
- *Effectivity Date To* - the date to which the contract is effective. You can enter the date directly or use a  **Calendar** pop-up to select the date.




1.2 = Rate Cards section

You can set the rate card that is applied to this contract.

You can add a rate card by clicking the  **New** button in the section. The screen will display a pop-up window to enter the following:


- *Rate Card Code* - the rate card code. You can enter the rate card code directly, or look up the code by clicking the  **Lookup** button to the right of the value entry. The screen will display a pop-up window of rate cards. You can select a code by clicking on the row or cancel entry by closing the window.
- *Effectivity Date From* - the date from which the rate card is effective. You can enter the date directly or use a  **Calendar** pop-up to select the date.
- *Effectivity Date To* - the date from which the rate card is effective. You can enter the date directly or use a  **Calendar** pop-up to select the date.

You can save your changes with the **Save** button, or discard your changes with the **Close** button.

You can delete an existing rate card by selecting the rate card row in the table and then clicking the  **Delete** button in the section header.

1.3 Notes section

You can add notes through the Notes section.

You can click the  **New** button in the Notes section to create a new note. This will be tagged with your user name and date/time.

Any notes may be removed by clicking the **x** in the corner of the note.

