

Configuring User Profile Contract Settings

Your user profile is used to automatically pre-populate fields, saving you time from having to enter basic information each time you create a contract document. This guide covers General and Contract settings. We do not anticipate you using Delegation settings.

Profile Setup: General Settings

1. Click the **Profile Icon** at top of screen.
2. Click **General** in the Settings menu.
3. Enter all pertinent information under **Account Settings**.
4. Click the icon in the **Default Category** section to select the most commonly used category of goods and services for which you create contracts. (Search by typing in a category name or by using the category tree to select.) Click **Done** in the Default Category menu.
5. Complete the **Default Region** field. If you are responsible for multiple locations, you can choose multiple regions or click on the highest level. Otherwise, select your campus only. Click **Done** after you completed your selection(s).
6. Click **Save** in the Settings menu.

Notes

- Since you can only select one Category, you may need to select a higher level category that incorporate related subcategories you use.
- Creating an Electronic Signature is shown in the *Setting Up an Electronic Signature QRG*.

Profile Setup: Contract Settings

The settings on the Contract tab pertain to information related to your contracts that will automatically pre-populate fields.

1. Click **Contracts** in the **Settings** menu
2. Select **Legal Company Name** – required field.
3. Select **Contract Type** – required field.
4. Select **Payment Terms** – required field.
5. Click **Save** to save your Profile changes.

The screenshot shows the 'Settings' page with the 'Contract' tab selected. The page is titled 'My Preference while creating contract'. The 'Contract' section includes the following fields:

- Contract Currency:** US Dollar - USD
- Document Type:** Agreement
- Contract Type:** Athletics Agreement
- Legal Company Name:** The Regents of the University of Calif...
- Counter Party Type:** Supplier
- Payment Term:** NET 30
- Upload of pre-signed contract:** On (selected) / Off
- Auto Renewal:** On (selected) / Off
- Renew after every:** Day(s)
- For Next:** Time(s)

Callout 1 points to the 'Contract' tab in the left sidebar. Callout 2 points to the 'Legal Company Name' dropdown menu, which is expanded to show 'The Regents of the University of California' and 'The Trustees of the California State University'. Callout 3 points to the 'Contract Type' dropdown menu, which is expanded to show a list of contract types including 'Athletics Agreement', 'Auxiliary Agreement', 'Equipment Loan Agreement', 'Facility Use Agreement', 'Independent Consultant Agreement', 'Independent Contractor Agreement', 'Master Lease Agreement', 'Memorandum of Understanding', 'Non-Disclosure Agreement', 'Placement Agreement', 'Professional Services Agreement', 'Purchase Agreement', 'Real Property Agreement', 'Revenue Generating Agreement', 'Services Agreement', and 'Sponsorship Agreement'. Callout 4 points to the 'Payment Term' dropdown menu, which is expanded to show a list of payment terms including 'NET 10', 'NET 30', 'NET 45', 'NET 60', 'Not Applicable', '1% 10, Net 15', '1% 15, Net 30', '1% 20, Net 30', '1% 20, Net 45', '1% 20, Net 60', '2% 10, Net 15', '2% 10, Net 30', '2% 10, Net 45', '2% 15, Net 30', 'Net 0', 'Net 7', 'Net 90', and 'Other, specify in contract language'. Callout 5 points to the 'Save' button at the bottom right of the form.

Note: The fields displayed on Settings tab are pre-populated based on your CalUsource persona and will be automatically applied to each new contract you create.