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

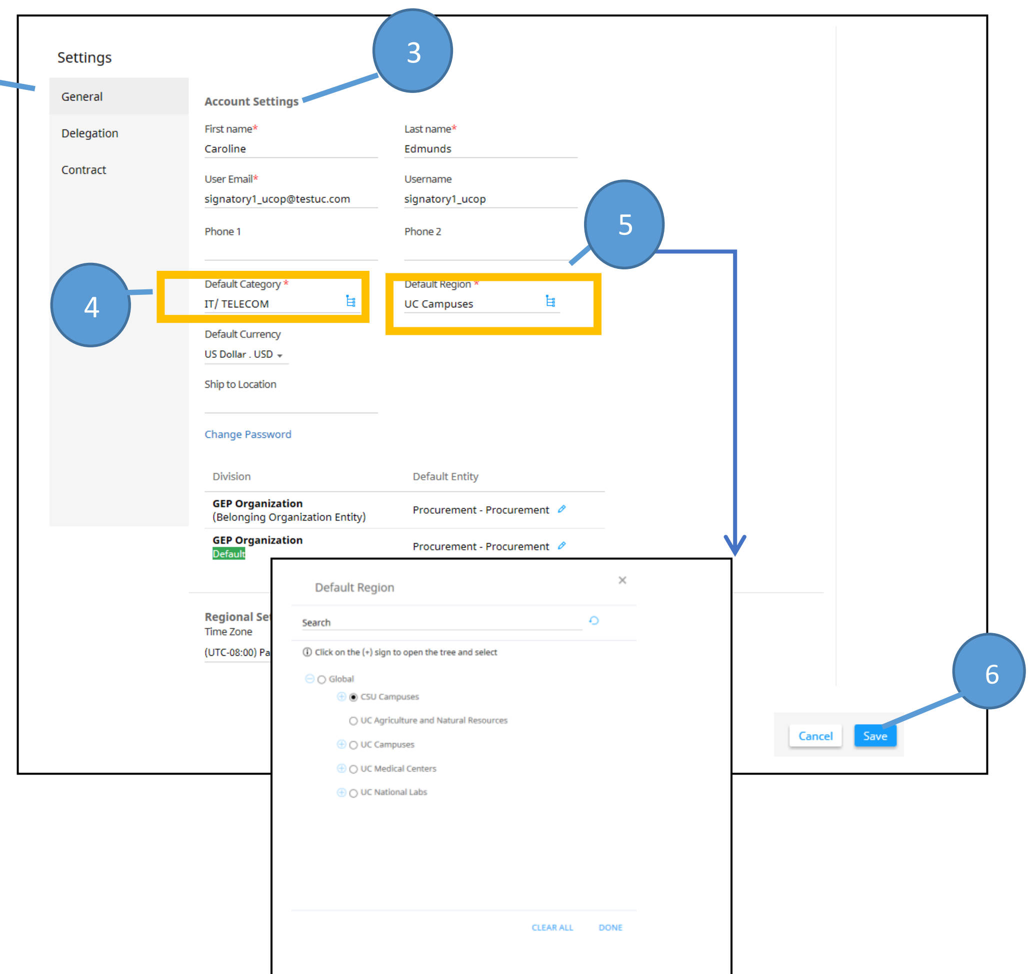
1. Click the **Profile Icon** at top of screen.

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.*

Quick Reference Guide

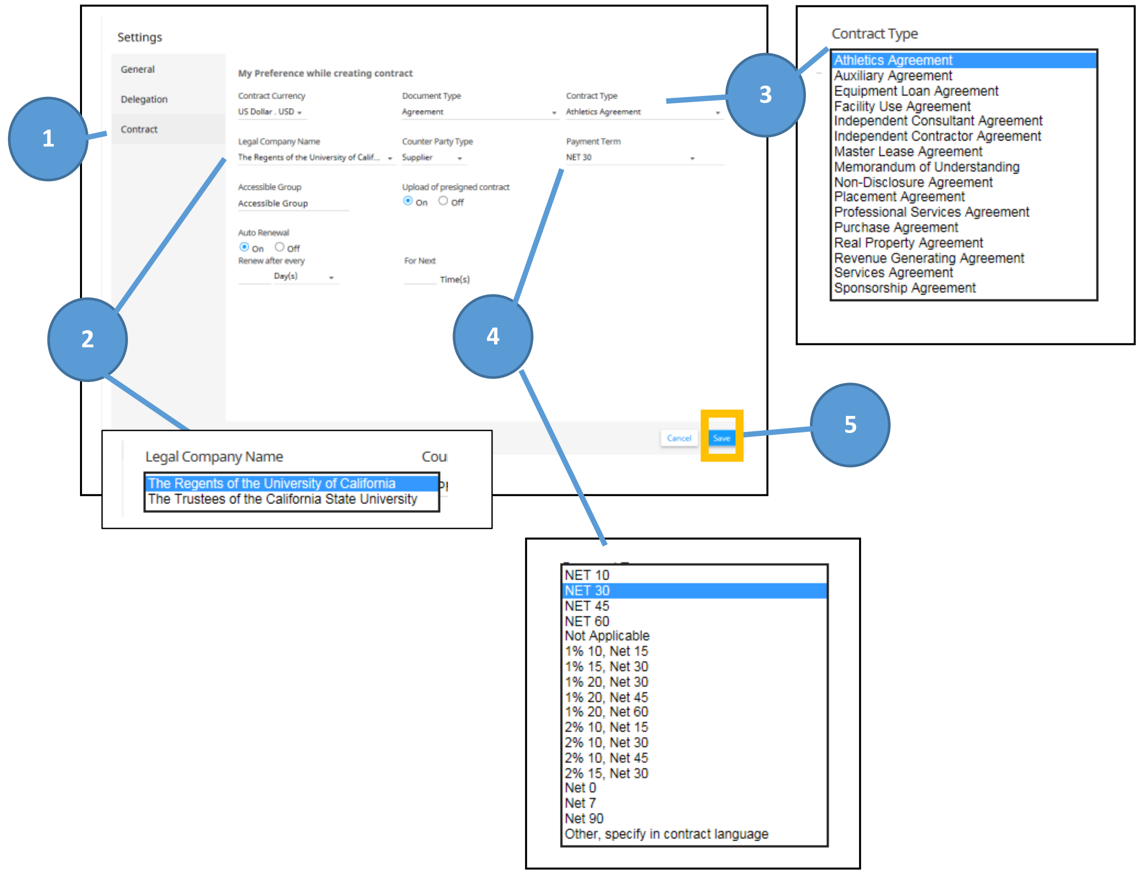
CALUSOURCE Collaborative Procurement

University of California & California State University

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.



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.