Quick Reference Guide

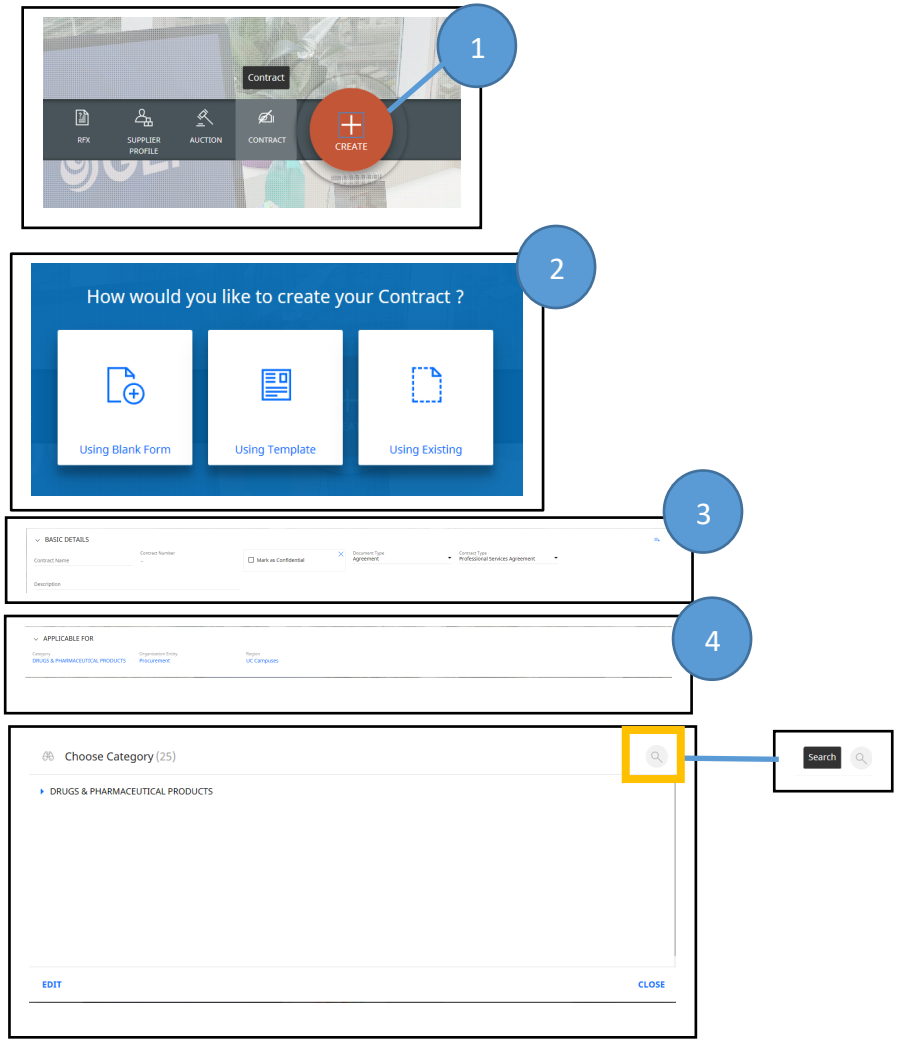
CALUSOURCE Collaborative Procurement

Creating a Draft Contract

This guide helps you complete the sections that make up a Contract cover sheet and identifies the fields that must be completed to save the contract draft.

High-level instructions for creating a draft contract

1. Click **Create** from the Main Menu and then click **Contract.**
2. Select which Contract template you'd like to use:
   - Choose the **Using Blank Form** option for creating a contract from scratch.
   - Choose the **Using Template** option for pre-uploaded contract templates
   - Choose the **Using Existing** option to copy an existing contract.
3. Complete the Contract **Basic Details** section
   - **Complete** – all mandatory fields.
     - Contract Name
     - Description (important to enter a good description for other people who will review the contract.)
     - Contract Type
   - Note that fields with an 'X' in upper right corner (like **Mark as Confidential**) are optional.
   - Select **Mark as Confidential** if you want to allow only the invited members of the buyer's team to view the RFx event.
     - Click **X** – to remove them from the contract.
   - Note that the **Contract #** field is auto-generated once the contract is saved as a draft (See Step 8 below.)
4. Complete the **Applicable** section by entering the following fields.
   - Select the **Category** that matches the subject of the contract.
     - Click the default entry in the **Default Category** field.



- Click **Edit.**
- Uncheck the default category.
- Click **Search** and type in a category name OR
- Select a category name by using the category tree.
  - Click the blue right arrow button to expand the category tree. (There are three levels to the tree.)
  - Click the radio button to select a category.
- Click **Done.**

- Select **Procurement i**n the **Organization Entity** field. (This should be the default.)
- Select the campus(es) the contract applies to in **Region.**
  - Only change this field if the campus this contract applies to is different from the default which is pre-populated from your **Profile Settings.**
  - Pick all regions the contract applies to.
  - If you need to change the campus use the Search and tree features described in Step 4 instructions above.
- **Click Done** to save your changes.

5. Complete the **Internal Party** section.
   Note: Most fields in this section are pulled from your Profile Setup and won't usually need to be changed, except **Authorized Signatory.**
   - Select the default name that displays in the **Authorized Signatory** field.
     - Click **Search** Lookup ((will only display officially designated signatories, not reviewers)
     - Select up to three names.
   - Click **Done.**

   Note: You can change or add signatories by clicking on the name displayed in the **Authorized Signatory** field that displays the selection box.

6. Complete the **External Party** section.
   - Type the supplier's name in the **Supplier** field.
   - A list of suppliers that matches your entry displays.
   - Click on the name that exactly matches the supplier's name.
   - Type the supplier's contact in the **Supplier Contact** field and select the correct name that display from the list– if the Supplier Contact is not available, see "Adding a Supplier Contact" QRG.
   - Type the supplier's signatory in the **Signatory** field and select the correct name that display from the list.
   - Add **Signatories** by selecting on the name displayed in the field that displays

7. Complete the **Terms** section.
   - Enter the following mandatory fields:
     - **Contract Value**
     - **Effective Date**
     - **Remains in Effect**
       - If **for period of** is selected, enter a number and then a period (Years, Days, Quarters, Months)
       - If **Till Date** is selected, enter the expiration date.

8 Click **Save as Draft** to save the contract.