

Configuring User Profile Contract Settings

Your user profile can 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 to 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 **Contract** 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. Five numbered callouts (1-5) point to specific elements: 1 points to the 'Contract' tab in the left sidebar; 2 points to the 'Legal Company Name' dropdown menu; 3 points to the 'Contract Type' dropdown menu; 4 points to the 'Payment Term' dropdown menu; and 5 points to the 'Save' button. Three inset boxes provide details for the dropdown menus:

- Legal Company Name:**
 - The Regents of the University of California
 - The Trustees of the California State University
- Contract Type:**
 - 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
 - Sponsorship Agreement
- Payment Term:**
 - 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
 - Other, specify in contract language

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.