contractdojo

Contract Dojo:
How to Configure your Contracts Settings

A guide covering how to get started with your Contract Dojo settings

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Contract Dojo Overview

What is Contract Dojo?

Contract Dojo is a Contract Management tool offering users the ability to store, manage and archive all contracts and documents in a secure repository. The tool allows users to instantly view, update and share important contract information, as well as setting up notifications to remind them of important dates relating to their contracts, in order to ensure effective contract management and supplier monitoring. Never again should anyone miss an auto-renewal or have to hunt around for signed contracts! By default you can add 10 contracts free of charge to judge the value of the tool before upgrading to more.

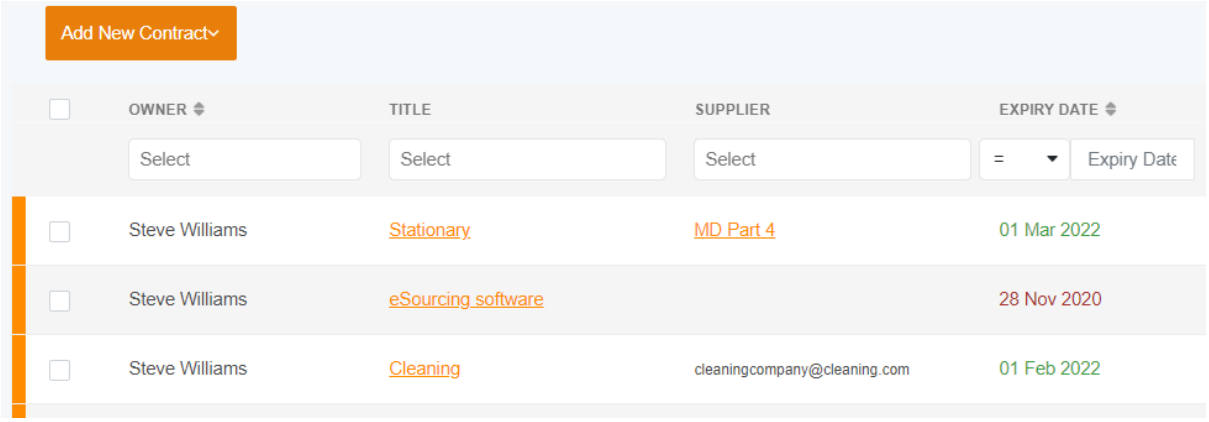

Figure 1.1 - Contract Summary Page

Getting Started

Before you get started using your Contract Dojo account, it's important that you've considered what information you would like to store so that you can get this set up in your Contracts Settings. Your Settings can be accessed via the Admin tab in the top right corner of your screen. Here you can select what information you would like users to include when creating their contract records and what details you would like to show in the Contract Summary. For example, you may wish to capture the geographic region or the specific Department that the contract relates to. If you're responsible for setting up your Contracts module but can't see the Admin menu, contact your Superhost to be given the correct permissions.

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Admin: Contracts Settings - Listing Page

Contract Summary / Listing Page Settings

At the top of your Contracts Settings page you will find your 'Listing Page' Settings. Here you can select which details of your contracts you would like to show in the overall summary page. Just tick the check-box for any information you'd like to see and these details will be included as columns that you can filter by in the summary of your contracts.

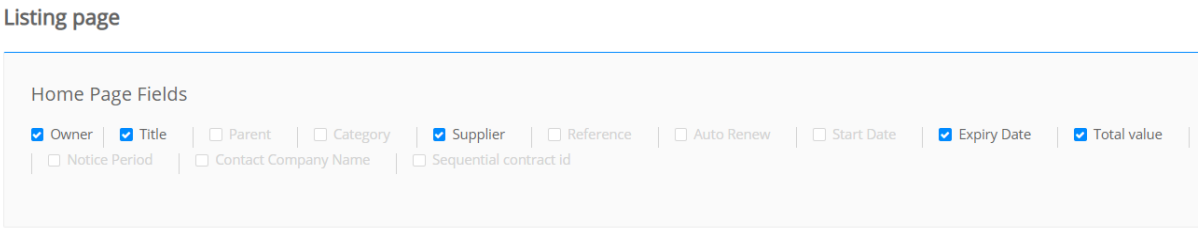

Figure 2.1 - Listing Page Settings

Admin: Contracts Settings - New / Edit Page Settings

Basic Details

The 'New / Edit Page' settings allow you to select which details users will be required to fill out when adding a new contract or when editing an existing contract. In the Basic Details section you can choose whether to include 'Contract Reference','Category', 'Legal Entity', and 'Jurisdiction', as well as which "Contract Types" to include.

If 'Category' is selected here you will also need to set up your categories within our Category Dojo module. To do this, click on the 'Set up spend categories' button. If you're new to Category Dojo, you will first need to set up a 'Spend Portfolio' and add your list of categories to the portfolio. Once this is done, go to the Host Permissions within Category Dojo and share your new portfolio with anyone who will be accessing the Contract Dojo module.

Contract types that are relevant to your business can be added by clicking on "Add new dropdown value". To make a contract type available tick the check-box. If you later decide a type is no longer required, you can untick the box. This will make it unavailable to add to new contracts but it will not affect existing contracts that have been marked with this contract type.

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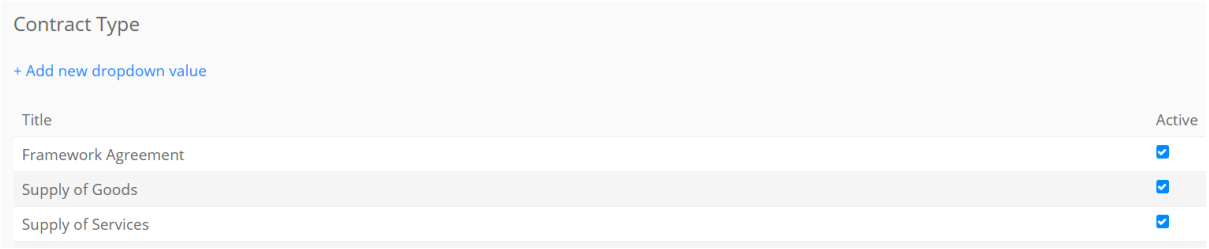

Figure 3.1 - Contract Types

For ‘Legal Entity’ and ‘Jurisdiction’, tick the check-box to include this as a field, add your drop-down values and then tick the ‘Active’ boxes for any options you would like to make available to users.

Contract Value

In the ‘Contract Value’ section you can set the details relating to figures that will be shown on the New Contract page. Here you can choose whether or not users can select the currency of their contracts and whether contracts should include a total value, annual value, or both.

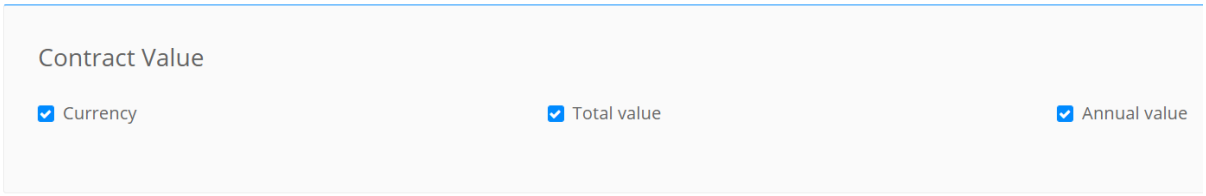

Figure 3.2 - Contract Values

Contract User Fields

Currently there is only one setting in the ‘Contract User Fields’ section. Here you can select whether or not you would like your users to be able to manually input the Company Name of any supplier to which a contract is attached. If this box is left unticked, supplier company names will only be shown if the supplier has signed up for a Market Dojo account.

Custom Fields

The ‘Custom Fields’ section makes it possible for you to create fields to capture any additional important information that is not covered elsewhere. Just click on “Add New Custom Field”, name your field, and select the response type. For ‘pick one from list’ and ‘multiple choice’ fields, you will need to save the field before you can add your response options. Once each field has been added you can tick the check-boxes to decide whether the field is required (mandatory when adding contracts), active (available for users to update) and shown in the summary (added as a column to the contract list page).

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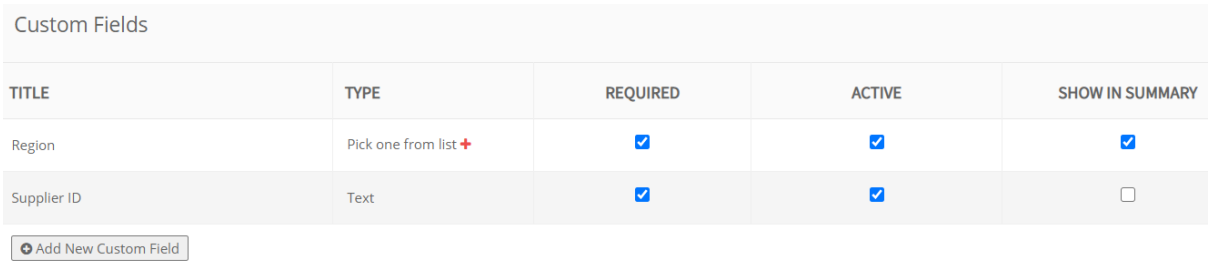

Figure 3.3 - Custom Fields

Contract Dates & Alerts

Fields relating to the contract expiry are selected or deselected in the 'Contract Dates & Alerts' section. Although most users opt to include all the options here, if you like you can prevent users from marking contracts as 'auto renew', from setting the interval between notifications and from choosing when notifications will start.

If the 'Interval' box is left unticked users will only be notified once about their expiring / expired contracts rather than receiving reminders at regular intervals. If the 'notice period' box is unticked, users will only be notified on the day of expiry.

Custom Notifications

As standard, all users will receive notifications relating to the expiry date of their contracts. Ticking the 'Custom Notifications' box here allows users to set up their own notifications in addition to this, for any dates they wish. For example, a user may choose to set up an alert to check whether a rebate threshold has been surpassed or for updating an index-linked price framework. If this box is left unticked, users will only be alerted about expiring contracts.

Admin: Host Permissions

Contract Permissions

By default, no additional user will have access to the Contracts module or to any contracts created by other users. To allow a user to access the module, go to the Host Permissions in the Admin Settings and on the Admin Permissions tab update the Contracts permission to either 'Edit' if the user needs to be able to add new contracts or 'View' if they just need to be able to review existing contracts. To give them access to contracts created by other users, go to the Contract Permissions Tab and select either 'View' or 'Edit' along with the User, Host Group or specific Contract that you would like to share.

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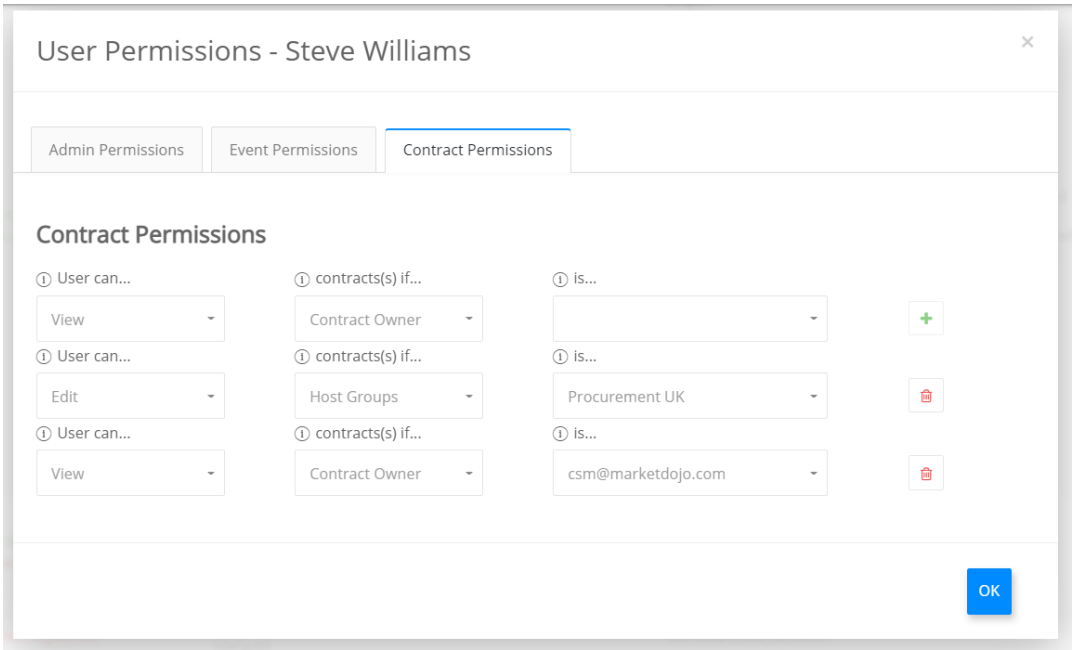

Figure 4.1 - Contract Permissions

Category Dojo Permissions

As previously mentioned, in order to be able to view and add categories in Contract Dojo, users will need to have access to the relevant 'Spend Portfolio' in Category Dojo. To grant users the relevant permissions, go to the 'Opportunities' module and access the Host Permissions from the Admin tab. Click on the edit icon next to the user's name and update the permissions to ensure they have access to the relevant portfolio(s).

Admin: Reporting and Integrations

Integrations

Contract Dojo has an open API, allowing you to easily export your Contract data in real time to a reporting tool of your choosing. To activate this, go to the Integrations Admin setting and tick the 'Enable Market Dojo API' box. Reporting can be set up internally by your organisation, or for a fee, Market Dojo can create a bespoke report to display your data in the way that is most beneficial to you. For more advice on exporting your data contact your Account Manager or our Support Team at support@marketdjo.com.

Reporting Tab

Once your reporting has been set up, reports that are published online can be brought back into the Market Dojo tool and displayed in the 'Reporting' tab. Access to the reporting tab

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can be assigned via the Host Permissions, however please note that all users who the reporting tab is shared with will need to have external access to the report, a Market Dojo licence will not necessarily be sufficient. For example, to view a Power BI report in Market Dojo, users would still need the relevant Microsoft account.

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