Contract Dojo Configuration Checklist

Before starting to add new contracts to your account, we recommend checking that you've done the following:

Essential

- ❏ Considered what data is important for you to store, e.g. region, legal entities, department etc.
- ❏ Selected the default fields to display in your Contracts Listing page
- ❏ Selected the default fields to be available on the New / Edit Contract page
- ❏ Reviewed/edited the default options for any default fields, e.g. adding new drop-down values to the Contract Type field
- ❏ Assigned the correct permissions in the Host Permissions tab

Optional

- ❏ Added any Custom Fields and selected which should be available on the Contracts Listing page
  Top tip: although optional, custom fields give you another great source of reporting, e.g. Supply Region or Supplier Tier, as well as being used to filter contracts in the app.
- ❏ Assigned Category Dojo permissions (where the Category field is being used)
- ❏ Enabled Market Dojo API (where data will be exported for reporting purposes)
  Top tip: Market Dojo has an open API which allows you to export your data into external reporting tools. Alternatively, we can set up a Bespoke Power BI report on your behalf - for details on this option contact your Account Manager

For additional information on any of the steps above, please see our Contract Configuration Guide.