

QUICK REFERENCE GUIDE

Creating Contract Documents from a Purchase Order

February 27, 2013

Introduction

Most contract documents are created using the navigation to the Contract Entry page. In some cases, however, you will want to create the contract document directly from a purchase order. The key difference is the navigation to create the document. Once the document has been created, all of the normal actions and options for contract documents are available.

This Guide explains the steps necessary to create a contract document by navigating from the purchase order to supplier contract management pages.

Creating a Contract Document from a Purchase Order

Creating a contract document from a purchase order may be the best option in some cases. One example is a purchase order created from an Annual Plan Agreement. You can create the contract document for that purchase order directly from the Maintain Purchase Order page.

Navigation: Purchasing, Purchase Orders, Add/Update POs

Click the *Create Document* icon to create a contract document for this purchase order.

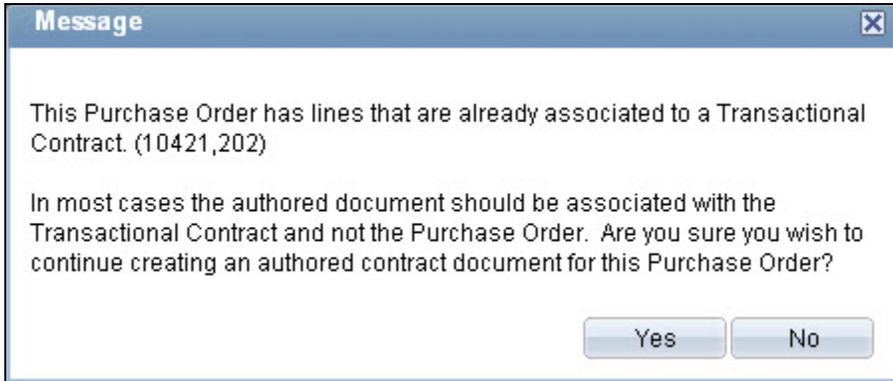
The screenshot displays the 'Maintain Purchase Order' interface. At the top, the breadcrumb trail reads: 'Purchasing > Purchase Orders > Add/Update POs'. The main form contains the following data:

- Business Unit:** G0210
- Origin:** 454 Materials Management Division
- PO ID:** 3000000227
- PO Status:** Open
- Budget Status:** Not Chk'd
- Copy From:** (Dropdown menu)
- Header Section:**
 - *PO Date: 02/19/2013
 - Expiration Date: 03/01/2013
 - *Vendor ID: 0000192549
 - Vendor: HIAWATHA R-001
 - *Buyer: FIVAN05
 - PO Reference: (Empty field)
 - *Billing Location: G020060000
- Summary Section:**
 - Doc Tol Status: Valid
 - Receipt Status: Not Recvd
 - *Dispatch Method: Phone
 - Amount Summary:

Merchandise:	500.00
Freight/Tax/Misc.:	0.00
Total Amount:	500.00 USD

SWIFT displays a warning message that the purchase order has lines related to a transactional contract. This message displays whenever the *Document Details* have been entered and saved on the contract.

It's OK to create the contract document directly from the purchase order. Click **Yes** to navigate to the *Create Document* page.



On the *Create Document* page, complete all required and necessary fields. The *Description* field defaults to the Purchase Order Number.

In this example, there is only one valid Configurator ID, which is defaulted. In some cases, you may see a **Configurator Selector** button, similar to that for Purchasing Contracts, followed by configurator selection wizard questions. Complete these to help SWIFT determine the correct Configurator ID.

Click **Create Document**.

You next respond to the document wizard questions relative to the specific document you are creating. At the very least, you must indicate whether you will be obtaining electronic signatures.

Click **Finish** when you have answered all the questions.

Financial Management System

Home | Print | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Supplier Contracts > Create Contracts and Documents > Contract Entry

New Window | Customize Page | http

Wizard Execute - Document Creation

Wizard ID: PT DOCUMENTS Description: MMD P/T Documents

Question Groups First 1 of 1

Question Group: SIGNATURES QUESTION

Group Instructions: Please answer the following questions

Questions

*Will you be collecting signatures electronically?

* Required Question
^Navigational Question

SWIFT opens the *Document Management* page. Here you can perform all of the same actions that you can for purchasing contract documents, including collaboration, approval, and signatures.

Financial Management System

Home | Print | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu

New Window | Help | Customize Page | http

Document Management

[Return to Document Search](#) [Return to Contract Entry](#)

Business Unit: G0210 PO ID: 3000000226

Vendor: HIAWATHA REDDY RENTS

Document Type: P/T Purchase Order Contracts

Description: 3000000226

Administrator: Vandiver, Jeri

Sponsor: Financial Department ID:

Version: 0.00 Created On: 02/19/13 1:51PM [Document Details](#)

Status: Draft Last Modified On: 02/19/13 1:51PM Signature Status: New

View and Edit Options:

[Add Attachments/Related Documents](#)
[Document Modification Summary](#)
[Document Version History](#)

Review and Approval:

[Internal Contacts](#) [Generation Log](#)

Other Document Actions: