



SWIFT displays the Document Status page for that supplier contract shell.


- **Cancel:** If there is no activity against it, you can cancel it.


Document Status


SetID	SHARE	Contract	73853
Document Date	01/03/2014	Status	Approved
Currency	USD	Document Type	Contract
Buyer		Released Amount	
Short Supplier Name	SAINT ELIZ-001		



 Requisitions



 Sourcing Events



 Procurement Contracts


 Purchase Orders


 Receipts


 Returns



 Vouchers



 Payments


- **Close:** If there is activity against it, you can close the supplier contract.


Document Status


SetID	SHARE	Contract	00000000000000000000241241
Document Date	12/28/2023	Status	Approved
Currency	USD	Document Type	Contract
Buyer		Released Amount	15,910.00
Short Supplier Name	FARGO MOOR-004		



 Requisitions



 Sourcing Events



 Procurement Contracts


Purchase Orders(1)


 Receipts


 Returns


 Vouchers


 Payments

2. Make sure that there are no outstanding purchase orders against it.

You may need to update the purchase order before closing the contract that it references. Buyers use a change order to reduce the purchase order to what has been paid. The change order allows the purchase order to be reduced and then closed on the Buyer’s WorkBench. Then, funds flow back to the contract.

IMPORTANT. SWIFT will not allow you to cancel or close an existing contract or contract line if there are any active transactions against it.

For more information, review the [Close a Purchase Order Referencing a Contract Using a Change Order](#) Quick Reference Guide to close a purchase order using the Buyer’s WorkBench.

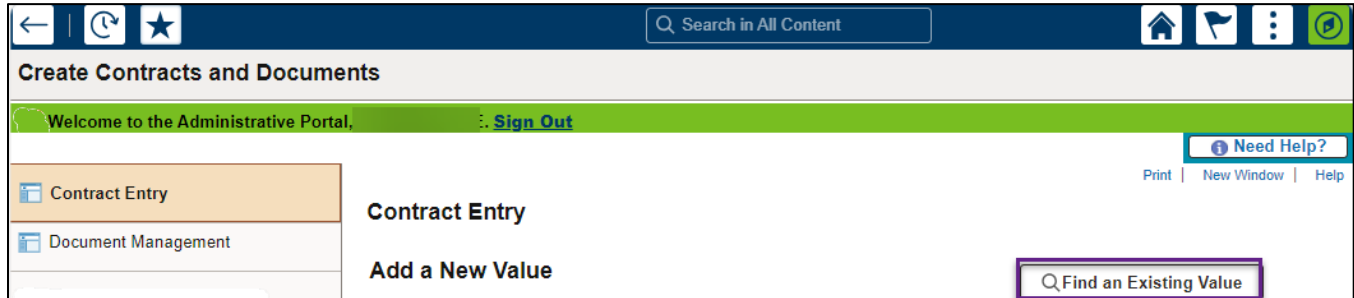
Steps to cancel or close an existing supplier contract shell

Step 1: Access the Contract Entry page

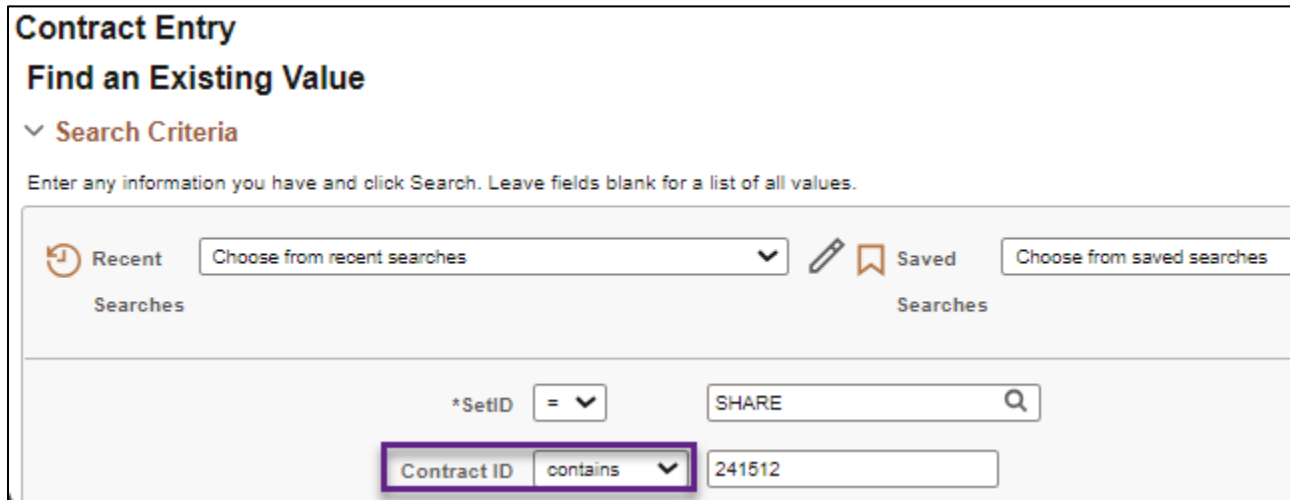
1. Navigate to the **Contract Entry** page.

Navigation Options	Navigation Path
Navigation Collection	Procurement, Supplier Contract, Create Contracts and Documents, Contract Entry page defaults.
WorkCenter	Procurement, Supplier Contract, Contract/Sourcing WorkCenter. Left menu Links, Add/Update Contracts, Contract Entry page.

2. On the Contract Entry page, select the **Find an Existing Value** button.



3. SWIFT opens up the Search Criteria section of the Find an Existing Value page.
 - a. Enter search items such the **Contract ID**.
 - b. Press the **Search** button at the bottom of the page.



4. In the Search Results section, select the **Contract ID**.

Search Results
1 rows - SetID "SHARE" Contract ID "241512"

SetID	Contract ID	Contract Version	Version Status	Contract Style	Contract Process Option	Supplier ID	Short Supplier Name	Supplier Name	Expire Date	Contract Status	OSP Contract Release Nbr/T-Nbr	Description
SHARE	000000000000000000000000241512	1	Current	Purchase Order	Order	0001013430	OLEB MEDIA-001	OLEB MEDIA LLC	02/01/2026	Approved	(blank)	training

Step 2: Review the contract before closing or canceling it

1. Make sure that there is no activity against it to determine to close or cancel it.
2. Make sure there are no outstanding purchase orders against it.

Step 3: Update the Supplier Contract

1. Review the **Status**. Depending on the Status of the contract, you may need to change it to “Open” in order to update fields on it.
2. Add a comment about why the contract is being closed or cancelled. Select the **Add/Edit** Comments link on the header.

Contract

SetID: SHARE Contract Version: 1

Contract ID: 000000000000000000000000241512 Status: Current

*Status: **Open** Approved Date: 02/08/2024

*Administrator/Buyer: 01106579 Hoff, Margaret E.

▼ Header ⓘ

*Contract Style: Purchase Order

Process Option: Purchase Order

OLEB MEDIA-001

Buttons: New Version, Add a Document, Add Comments

- a. SWIFT displays the Header Comments page. In the **Comments** field, enter a message with the reason the agency is canceling or closing the contract shell.
- b. Then, select **OK**.

Header Comments

SetID: SHARE Contract ID: [Redacted] Version: 1

Retrieve Active Comments Only Retrieve

*Sort Method: Comment Time Stamp *Sort Sequence: Ascending Sort

Comments 1 of 1 View All

Use Standard Comments Comment Status: Active Inactivate

Contract is completed, per Name and Email.

Send to Supplier Show at Receipt Copy to Purchase Order

Show at Voucher

Associated Document

Attachment Attach View Delete Email

Buttons: OK, Cancel, Refresh

- On the header of the Contract Entry page, change the **Status** to “Canceled” or “Closed” depending upon if there is activity against it.

Contract

SetID SHARE

Contract ID 000000000000000000241512

*Status Canceled ▼

- If you are cancelling a contract, SWIFT displays a warning message about canceling the contract. Select **OK**.

This action will cancel the entire contract. Continue? (10400,463)

The action that you are taking will cancel the entire Contract. If you do not want to cancel the contract, then you cannot perform the action at this time.

OK
Cancel

- After you cancel or close an existing supplier contract, the Status will reflect this change when you search for it.

SetID	Contract ID	Contract Version	Version Status	Contract Style	Contract Process Option	Supplier ID	Short Supplier Name	Supplier Name	Expire Date	Contract Status
SHARE	000000000000241512	1	Current	Purchase Order	Order					Canceled

You have successfully canceled or closed a supplier contract shell.

Steps to cancel an existing supplier contract line.

Note: you can only cancel a contract line.

Step 1: Navigate to the Contract Entry page

View Step 1 in the “Steps to cancel or close an existing supplier contract shell” in this guide.

Step 2: Review the contract line before canceling it.

- Make sure that there is no activity against the line to determine if you can cancel it.
- Make sure there are no outstanding purchase orders against it.

Step 3: Update the Supplier Contract Line.

1. On the Contract Entry page, confirm or change the **Status** to “Open.”
 - a. If you change the Status and select **Save** at the bottom of the page, SWIFT displays the Change Reason page.
 - b. Add a **Reason Code** and a comment about the change.
 - c. Select **OK**.
2. Lines without activity against them will have a **Cancel Line** icon, which is a red “X.”
3. As an option, you can add line comments using the **Line Comments** icon, which is a white comment bubble.

Line	Item	Description	UOM	Category	Include for Release	Status
1		software	EA	43230000	<input checked="" type="checkbox"/>	Active
2		training	EA	86100000	<input checked="" type="checkbox"/>	Active

4. When you are ready to cancel the line, select the **Cancel Line** icon.
5. SWIFT displays a warning message. Select **Yes** if you wish to cancel the line.

This action will cancel line 2 for this contract. Continue? (10400,462)

The action that you are taking will cancel this line for this Contract. If you do not want to cancel this line, then you cannot perform the action at this time.

6. SWIFT updates the Contract Entry page. The line now has a “Cancelled” Status.

Line	Item	Description	UOM	Category	Include for Release	Status
1		software	EA	43230000	<input checked="" type="checkbox"/>	Active
2		training	EA	86100000	<input type="checkbox"/>	Cancelled

Step 4: Save the Supplier Contract.

1. Press the **Save** button at the bottom of the page.
2. The Change Reason page reappears. Update as needed and then press **OK**.
3. When you are ready, update the Status to “Approved” at the top of the page.
4. Select **Save** and respond to the Change Reason page.

You have successfully cancelled a line on an existing supplier contract.