Create a New Version of a Supplier Contract

The Office of State Procurement recommends that in most cases agencies should update the existing supplier contract record. There are limited circumstances when an agency should create a new version of a contract shell.

Create a new version of an existing contract shell only if one of these reasons apply:

1. To cancel a contract line.
2. To reactive a cancelled contract line.

This reference guide describes the reasons when an agency can create a new version of a supplier contract. It also lists the steps to create a new version of a supplier contract.

Steps to complete

- Step 1: Access the contract shell
- Step 2: Create a new version of the contract shell
- Step 3: Update the new version of the contract shell
- Step 4: Update the status and save the supplier contract

Reasons to create new version of contract shell

1. To cancel a contract line on a purchase order

Create a new version if a buyer no longer wants to use a line on a purchase order. SWIFT will process transactions against existing lines. However, SWIFT will not allow new transaction to process against the cancelled line. To cancel a contract to line create a new version of the contract, scroll down to the lines section and press the Cancel icon (e.g., red X) on the particular line.

2. To reactive a cancelled contract line

Creating a new version of a contract will undo the previous cancelling of a line. It allows buyers to use it again. To reactivate a cancelled contract line, press the icon with a red X and blue arrow.
Steps to create a new version of an existing supplier contract

Step 1: Navigate to the Contract Entry page

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<th>Navigation Options</th>
<th>Navigation Path</th>
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<tr>
<td>Navigation Collection</td>
<td>Procurement, Supplier Contract, Create Contracts and Documents, Contract Entry page defaults.</td>
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1. On the **Contract Entry** page, select the **Find an Existing Value** tab.

   SWIFT opens up the **Search Criteria** section of the **Find an Existing Value** page.

2. Enter search items such the **Contract ID**. Press the **Search** button. On the **Search** results section, press the **Contract ID** of the contract you wish to work on.

   SWIFT displays the **Maintain Purchase Order** page for the selected contract.
Step 2: Create a new version of the contract


2. SWIFT displays a message, “The contract must be saved before a draft can be created.” To create a new version, select the Yes button.

3. SWIFT displays the Change Reason page. Select a Reason Code. Add a comment that describes the reason for the change. Press OK.

4. SWIFT updates the Contract Entry page on the Contract Version section. SWIFT updates the Version of the contract (e.g., from 1 to 2). The Status of this new version is “Draft”.

Contract

Contract Version

Reason Code Page

Contract

Contract Version

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Step 3: Update the new version of the contract shell

Update the contract. See the three reasons for creating a new version in the overview of this section. In this case, update the new version to reactivate a canceled contract line.

1. To reactivate a canceled contract line, scroll down to the lines section. Press the Reactivate Canceled line icon on the particular line.

2. SWIFT displays a warning message. Press Yes if you wish to continue to reactivate the canceled line.

- SWIFT activates the line. The line Status is “Active”.

Step 4: Update the Status and save the contract

1. On the Contract Entry page, update the Status from “Open” to “Approved”.
2. SWIFT shows a warning message stating that the draft version will become the current version. Select OK.

- SWIFT updates the Contract Version section on the header. The Status is “Approved”.

You have successfully created a new version of a supplier contact.