Send a Contract Document to Contacts

The Send to Contacts button allows you to send a copy of the current version of the document to any individual you identify before you execute the contract document. Use this option to get feedback on a contract document from someone who is not setup in SWIFT as an official collaborator.

Access this feature on the Document Management page.

If you want to send related documents to contacts, you must be using document types with statuses of “Draft”, “Complete Statuses Only and Draft” and “Approve Statuses Only”. Then, documents that you create using those applicable statuses can be sent as related documents. SWIFT prevents you from selecting to send documents that have their own dispatch setup.

This guide provides the steps to send a contract document created in SWIFT to external contacts.

Steps to complete

- Step 1: Access the Contract Document Management page
- Step 2: Send the contract document to contacts

Steps to send a contract document to contacts through SWIFT

Step 1: Access the Contract Document Management page

<table>
<thead>
<tr>
<th>Navigation Options</th>
<th>Navigation Path</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navigation Collection</td>
<td>Procurement, Supplier Contract, Create Contracts and Documents, Contract Entry page defaults.</td>
</tr>
</tbody>
</table>

1. On the Contract Entry page, select the Find an Existing Value tab. Enter the Contract ID, then press the Search button.
2. On the Search Results section, press the link of the Contract ID.
3. SWIFT displays the **Contract Entry** page for that contract. In order to amend the contract document, the *Status* must be “Open”. Select the **Maintain Document** button on the right side of the page.

SWIFT opens up the **Document Management** page.
Step 2: Send the contract document to contacts

1. SWIFT displays the Document Management page for this contract. Go to the bottom of this page. Press the Send to Contacts button.

2. SWIFT opens the Send to Contacts page.
   - Depending on how you want to send the contract document, enter the necessary information.
   - Then, select OK.

Fields on the Send to Contacts page.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Field Description</th>
</tr>
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</table>
| Delivery Method    | Choose “Email” or “Manual”.  
   * If you check “Email”, SWIFT sends it directly to the contacts you list on this page.  
   * If you check “Manual”, you can download the file yourself and delivery it how you wish to. However, you cannot track any changes in SWIFT. |
| Subject            | Becomes the subject line of the email if “Email” is the Delivery Method. This field disappears if you choose “Manual” as the Delivery Method. |
| Description        | Becomes the body text of the email if “Email is the Delivery Method. This field disappears if you choose “Manual” as the Delivery Method. |
| Files to be Sent   | Select which parts of the contract document to send.  
   * Current Document: If your agency authorizes SWIFT to send them, SWIFT marks these checkboxes to be active.  
   * Attachments: If your agency authorizes SWIFT to send them, SWIFT marks these checkboxes to be active.  
   * Related Documents: If your agency authorizes SWIFT to send them, SWIFT marks these checkboxes to be active.  
   * Set to Checked Out: This prevents anyone from making changes while the document is out.  
   * Send Copy to Administrator: This feature is helpful if you wish to send a document on behalf of the administrator. |
### Field Description

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| Contacts   | Choose the recipients of the document. They can be internal or external contacts.  
• Enter the contact’s information to receive the document: Name, Title, Email ID  
• Check the Selected box.  
• Add multiple contacts by clicking the Add Row icon.  
• Check the Selected box. |

SWIFT returns you to the **Document Management** page.

**You have successfully sent a contract document to contacts.**