

QUICK REFERENCE GUIDE

Updated November 1, 2019

Use Notifications and Thresholds on Supplier Contracts

As an option, agencies can use SWIFT features to better manage their supplier contracts.

- **Contract Notifications:**

Agency staff can send automatic notifications to themselves or others to alert them on upcoming contract dates.

- **Contract Spend Thresholds:**

Agencies can set up spend thresholds on an individual contract. A spend threshold is a specific monetary amount for a contract or contract item. Using the spend threshold feature, you can define the threshold and then notify users when spending on a contract crosses the threshold amount.

Here is an example of a SWIFT notification. Users can select the link and review the contract information.

From:
Sent: Monday, July 15, 2019 9:55 AM
To:
Subject: Contract Notifications for: SetID = SHARE, Contract ID = 00000000000000000114618

m MINNESOTA

Contract Notifications for: SetID = SHARE, Contract ID = 00000000000000000114618

Details

The following alerts apply for Contract SetID: SHARE, Contract ID: 00000000000000000114618, Version: 1. This contract begins on 2016-08-29 and is described as: 785W0048 MCF-STLWTR PREDESIGN.
Master Contract ID: 16AMR

Contract is nearing or has reached its Expiration Date: 2019-06-30 URL: https://syst.fms.systems.state.mn.us/psp/fms92ia/EMPLOYEE/ERP/c/ADMINISTER_CONTRACTS.CNTRCT_ENTRY.GBL?Page=CNTRCT_HDR&CNTRCT_ID=00000000000000000114618&SETID=SHARE&VERSION_NBR=1&Action=U

Steps to complete

- Step 1: Access the Contract Entry page
- Step 2: Set up notifications and/or thresholds

Process steps to set up contract notifications and spend thresholds.

Step 1: Access 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.

On the **Contract Entry** page, select the **Add a New Value** tab and press the **Add** button.

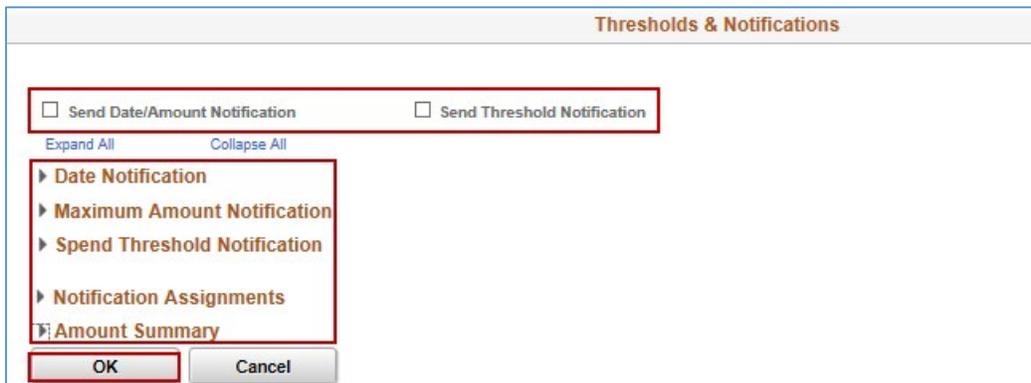
The screenshot shows the 'Contract Entry' page with three tabs: 'Find an Existing Value', 'Keyword Search', and 'Add a New Value'. The 'Add a New Value' tab is highlighted with a red box. Below the tabs are several input fields: 'SetID' with the value 'SHARE', 'Contract ID' with the value 'NEXT', 'Style ID' with the value 'PO', and 'Contract Process Option' with a dropdown menu set to 'Purchase Order'. At the bottom left, there is a green 'Add' button highlighted with a red box.

Step 2: Set up notifications and/or thresholds

1. SWIFT displays the **Contract Entry** page. Select the **Thresholds & Notifications** link.

The screenshot shows the 'Contract Entry' page with a 'Contract' section. The 'Contract' section includes fields for 'SetID' (SHARE), 'Contract ID' (NEXT), '*Status' (Open), '*Administrator/Buyer', '*Contract Style' (Purchase Order), 'Process Option' (Purchase Order), '*Supplier', '*Supplier ID', 'Primary Contact', 'Supplier Contract Ref', 'Description', 'OSP Contract Release Nbr/T-Nbr', and '*Begin Date' (07/15/2019). To the right of these fields is a 'Contract Version' section with 'Version' 1 and 'Status' Current. Below the 'Contract Version' section are 'Approval Due Date' and 'New Version' and 'Add a Document' buttons. On the right side of the page, there is a list of links: 'Add Comments', 'Contract Activities', 'Primary Contact Info', 'Contract Header Agreement', 'Contract Releases', 'Custom Fields', 'Activity Log', 'Document Status', and 'Thresholds & Notifications'. The 'Thresholds & Notifications' link is highlighted with a red box.

SWIFT opens up the **Thresholds & Notifications** page.



2. Check the box from at least one of the notification types.
 - **Send Date/Amount Notification** and/or **Send Threshold Notification**.
 - a. **Send Date/Amount Notification** checkbox:

The contract administrators can use the **Date Notification** section to choose to be notified of various dates on the contract such as the *Expire Date*, *Renewal Date* or *Approval Due Date*. The administrator can enter the number of days ahead they would like the notification. The administrator may also enter an amount or percentage to be notified when a contract hits a specified released amount.

- b. **Send Threshold Notification** checkbox:

The contract administrator can use the **Spend Threshold** section to be notified when the contract release amount exceeds the threshold amount entered.

3. Update the fields in the **Date Notification** section as needed.

Use the **Date Notification** section to define expiration notification information.

Fields on the Date Notification section on the Thresholds & Notifications page.

Field Name	Field Description
Date Notification	<ul style="list-style-type: none"> • Expire Date: The date the contract expires. It will default from the Contract Entry page. If you update it here, SWIFT will also update it on the Contract Entry page. • Expiration Notification Date: SWIFT determines and displays this date. When a contract reaches this notification date, SWIFT notifies the identified buyer that the contract is about to expire. The buyer receives a workflow email notification. • Renewal Date: This field appears by default from the Contract page. You can enter the Renewal Date on this page and the SWIFT will update the Renewal Date on the Contract page. • Renewal Notification Date: SWIFT determines and displays the Renewal Notification Date. When a contract reaches this Notification Date, SWIFT notifies the identified buyer that the contract is ready for renewal. The buyer receives a workflow email notification. • Approval Due Date: This field appears by default from the Contract page. If the contract is in an Open status, you can enter the Approval Due Date on this page and SWIFT will update the Approval Due Date on the Contract page. • Approval Notification Date: Enter the number of days that you want SWIFT to notify the buyer before a contract needs to be approved. • Notify Days Before Expires, Renewal, Approval: Enter the number of days that you want SWIFT to notify the buyer for the expiration, renewal or approval.

4. Update the fields in the **Maximum Amount Notification** section as needed.

Use this section to set up amounts that trigger notifications to the buyer when the total contract released amount is either within the specified amount or percentage of the maximum contract amount.

Maximum Amount Notification

Notify user when the total contract released amount is either within the specified amount, or within the specified percentage, of the maximum contract amount.

Amount Less than Maximum USD

Percent Less than Maximum

Notification Amount

Fields on the Maximum Amount Notification section on the Thresholds & Notifications page.

Field Name	Field Description
Maximum Notification	<p>Amount Less than Maximum: Enter the amount below the contract maximum amount for which you want SWIFT to notify the buyer that the contract is about to reach its maximum amount.</p> <p>Percent Less than Maximum: Enter the percentage below the contract maximum amount for which you want SWIFT to notify the buyer that the contract is about to reach its maximum amount.</p> <p>Notification Amount: SWIFT determines and displays the notification amount. When a contract reaches this notification amount, SWIFT notifies the identified buyer that the contract is about to exceed the maximum limit amount. The buyer receives a workflow email notification.</p>

5. Update the fields in the **Spend Threshold Notification** section as needed.

Use this section to enter the amount at which SWIFT sends a notification to the buyer that the contract amount has reached or exceeded the spend threshold. SWIFT totals the individual line item amounts to arrive at the total amount for the contract. SWIFT notifies the buyer only when this threshold is reached.

 **Spend Threshold Notification**
 Notify user when the released amount exceeds the threshold.

Released Threshold Notification Amount USD

6. In the **Notification Assignments** area, you must enter one or more users to be notified for each of the notifications you have chosen to use.

IMPORTANT: You must enter at least one user to be notified including yourself.

Notification Assignments					
Notification Type	User ID	User Description	Email Address		
1 Expiration	Employee ID and Name		Swift.Testing@state.mn.us	+	-
2				+	-

Fields on the Notification Assignment section on the Thresholds & Notifications page.

Field Name	Field Description
Notification Type	Select one of these notification types. <ul style="list-style-type: none"> • Approval Due Date • Expiration • Maximum Amount • Renewal • Spend Threshold
User ID	Enter the Employee ID or name in the looking glass icon.

Field Name	Field Description
Add a New Row icon/ Delete a Row icon	Use these icons to add a new row (plus sign) or delete a row (minus sign).

Fields on the Amount Summary section on the **Thresholds & Notifications** page.

Field Name	Field Description
Maximum Amount	Enter a value to specify a total amount that this contract should not exceed. The total released amount of all lines plus the amount released for open items must not exceed this amount.
Total Line Released Amount	Displays the total released amount of all line items on the contract.
Total Category Released Amount	Displays the total released amount of all categories on the Contract.
Open Item Amount Released	Displays the amount that is released for open items in an open item contract. This information appears only if the contract is referenced on a purchase order using open item referencing.

- After you enter items in the fields on the **Thresholds & Notifications** page, select the **OK** button. SWIFT returns you to the **Contract Entry** page. Continue to process the supplier contract.

You have successfully used the Notifications and Thresholds page on a Supplier Contract.