

QUICK REFERENCE GUIDE

Add/Change Vendor Contact Information

April 15, 2013

After you have registered as a SWIFT vendor with the State of Minnesota, it may be necessary to update existing, or add additional contact information. This should be done when your information changes to ensure questions, information, and documents are directed to the appropriate individual within your organization.

Keep in mind, a newly updated or added contact may not be available for immediate use. It must be approved before it can be used; this will generally be done within two days. If a new contact is needed for a specific event, make sure it is added well in advance to ensure it is approved in time.

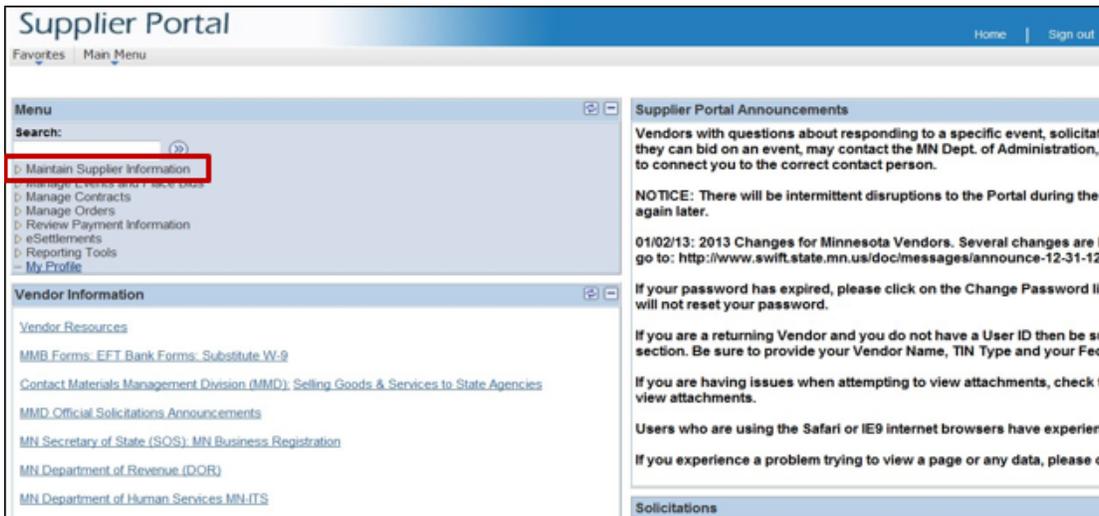
Create A New Contact

Begin by Navigating to the SWIFT Supplier Portal: <http://supplier.swift.state.mn.us>

1. Log into the SWIFT Supplier Portal using your User ID and Password



2. Click the *Maintain Supplier Information* menu link



3. Click *Contacts*



This will open the *Maintain Contacts* page where you can see your existing contacts.

4. Click **Add a New Contact**



add

5. Enter contact information as appropriate
 - a. *Description*: Enter a brief description of the contact
 - i. Required field
 - b. *Desired Status*
 - i. Required field
 - ii. *Active*: The contact can be used
 1. This should be selected when creating a new contact
 - iii. *Inactive*: The contact is no longer valid
 - c. *Name*: Contact name
 - d. *Email ID*: Contact email address
 - e. *URL*: Contact web address

- f. *Location:* Vendor Location
 - i. Required field

Note: The Location is not your physical address, but represents the various business entities that fall under one tax ID number; it is the set of business rules for different divisions/areas within a single company. Business rules include components like the payment terms and the set of addresses (orders, returns, remit to, etc.).

For example, a company may have multiple DBA (Doing Business As) names and each would be a separate location under a single vendor number. Another example, in a large university with multiple departments, each department would be a separate location.

- g. *External User:* Select the User ID associated with this contact
- h. *Role:* Identify the purpose of the contact (sales, service, billing, etc.)

The screenshot shows a web form with a 'Role' dropdown menu open. The dropdown lists the following options: Accounts Payable, Billing Contact, Broker, Commercial Paper Contact, Contract Collaborator, Executive Management, External Contact, General, Internal Corporate Contact, Investment Pool Contact, Line of Credit Contact, Sales Contact, Service Contact, and Warehousing/Shipping Contact. The 'External Contact' option is currently selected. Other form fields visible include 'Effective Date', 'Comments - include name and phone number', 'Telephone Information', and '*Type'. There are also 'Return to Contact List' and 'Save' buttons.

- i. *Authorized to Sign Contracts:* Check this box if the contact is authorized to sign contracts on behalf of your organization
- j. *Effective Date:* Date which Contact becomes effective and can be used

Note: Effective dates are used throughout SWIFT for various records and represent the date at which the record can be used. A record is a set of data entered into SWIFT; like a contact.

For example, if you enter a contact on Monday with an effective date of Wednesday, the contact could not be used for SWIFT documents (event responses, contracts, etc.) created before Wednesday. If a contact is needed for a document created before the date the contact itself is created, the effective date should be entered as a date before the document creation date.

- k. *Comments:* Add any additional comments about the contact
- l. *Telephone Information:*
 - i. *Type:* Enter the type of number (Business, Cell, Fax, etc.)
 - ii. *Process Prefix:* Not used
 - iii. *Phone:* Enter the phone number including area code
 - iv. *Ext:* Enter extension number if applicable
 - v. *Add:* Click to add an additional contact phone number
 - vi. *Delete:* Click to get rid of a contact phone number
- m. *Return to Contact List:* Return to the list of contacts without saving any changes

6. Once all updates are made, click **Save**

Maintain Contacts
Contact Information

TEST

*Description: *Desired Status: Active

*Name:

Email ID:

URL:

*Location: (Invalid Value) External User:

Role: Authorized to Sign Contracts:

Effective Date: 03/06/2013

Comments - include name and phone number:

Telephone Information

Type	Prefix	Phone	Ext	
Business Phone		<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/> <input type="button" value="Delete"/>

[Return to Contact List](#)

* Required Field

A confirmation message will appear, this lets you know the changes have been successfully made.

7. Click **OK**

Maintain Contacts
Save Confirmation

The Save was successful.

You are then returned to the *Maintain Contacts* page.

Maintain Contacts
Current Contacts

TEST

Current Contacts			
Description	Contact Name	Status	
KARI CABLE - TEST VENDOR	KARI CABLE - TEST VENDOR	Active	<input type="button" value="Edit"/>
ORDERS OVER 10000	SALLY SMITH	Pending	<input type="button" value="Edit"/>

Once the new contact is reviewed and approved, the *Status* will change to “Active” and it will be available for use. The user who submitted the contact will receive an email once the contact has been approved.