SWIFT
Statewide Integrated Financial Tools

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.

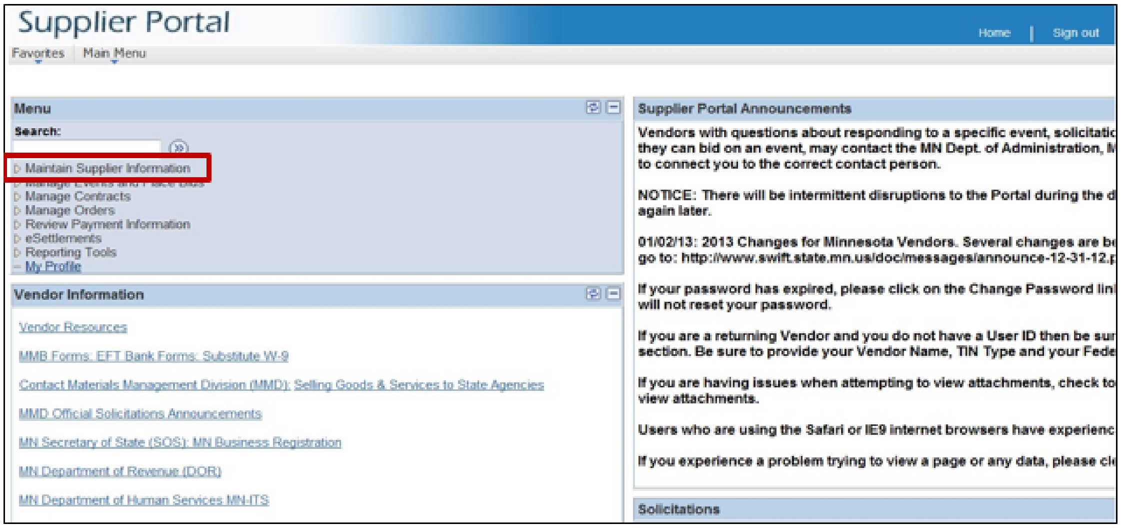
Keep in mind, a newly updated or added contact may not be available for immediate use. It must be approved before it can be used; this will generally be done within two days. If a new contact is needed for a specific event, make sure it is added well in advance to ensure it is approved in time.

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

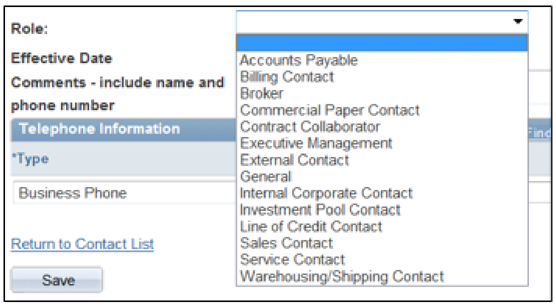
5. Enter contact information as appropriate
    a. *Description*: Enter a brief description of the contact
        i. Required field
    b. *Desired Status*
        i. Required field
        ii. *Active:* The contact can be used
            1. This should be selected when creating a new contact
        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 *Inactive:* The contact is no longer valid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 an 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.)



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

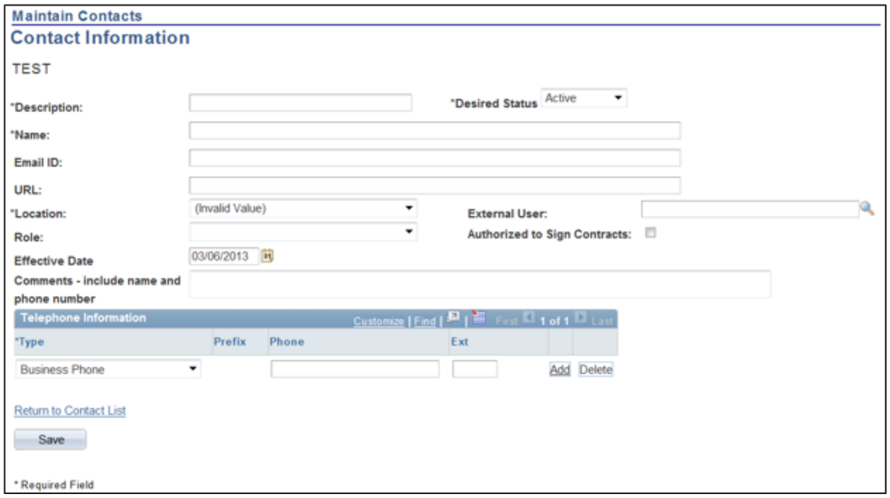
   Note: Effective dates are used throughout SWIFT for various records and represent the date at which the record can be used. A record is a set of data entered into SWIFT; like a contact.

   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

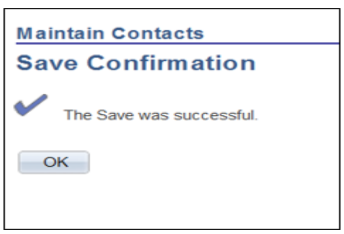
m. Return *to Contact List:* Return to the list of contacts without saving any changes

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



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

7. Click **OK**



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

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.