

## QUICK REFERENCE GUIDE

February 20, 2024

### 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 basic steps to create a new version of a supplier contract shell.

View the [Create a Supplier Contract Shell](#) Quick Reference Guide for more details of those steps.

### 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 on the particular line. The Cancel icon is a red X.

Line	Item	Description	UOM	Category	Include for Release	Status
1		Hazardous hygiene services	EA	81141802	<input checked="" type="checkbox"/>	Active
2		Supplies	EA	81141802	<input checked="" type="checkbox"/>	Active

#### 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 **Reactivate Line** icon, which has a red X and blue arrow.

Line	Item	Description	UOM	Category	Include for Release	Status	
1		Hazardous hygiene services	EA	B1141802	<input checked="" type="checkbox"/>	Active	
2		Supplies	EA	B1141802	<input type="checkbox"/>	Cancelled	

## Steps to create a new version of an existing supplier contract

### Step 1: Access the Contract Entry page

1. Navigate to the **Contract Entry** page.

Navigation Options	Navigation Path
<b>Navigation Collection</b>	Procurement, Supplier Contract, Create Contracts and Documents, Contract Entry page defaults.
<b>WorkCenter</b>	Procurement, Supplier Contract, Contract/Sourcing WorkCenter. Left menu Links, Add/Update Contracts, Contract Entry page.

2. On the Contract Entry page, select the **Find an Existing Value** button.
3. SWIFT opens up the Search Criteria section of the Find an Existing Value page. Enter search items such the **Contract ID**. Press the **Search** button.
4. In the Search results section, select the **Contract ID** of the contract you wish to work on.

### Step 2: Create a new version of the contract

1. SWIFT displays the Maintain Purchase Order page for the selected contract.
  - a. The **Status** of the contract must be “Approved.”
  - b. Press the **New Version** button.

**Contract**

SetID SHARE

**Contract Version**

Version 1 Status Current

Contract ID 00000000000000000000241510

\*Status Approved

Approved Date 02/27/2024

**New Version**

- c. SWIFT displays a message, “The contract must be saved before a draft can be created.” Select the **Yes** button.

Contract must be saved before a Draft can be created. (10400,577)

Contract must be saved before a Draft can be created. Hit Yes to proceed with Saving the contract and creating a Draft version. Hit No to cancel out and continue working with the Current version.

2. SWIFT displays the Change Reason page.
  - a. Select a **Reason Code**.
  - b. Add a comment that describes the reason for the change. Press **OK**.

**Reason Code Page**

Enter a reason code and comment for making changes that are being tracked.

SetID SHARE Contract ID 0000000000000000000241510

Reason Code

Comment

Use Same Reason Code

3. SWIFT updates the Contract Entry page on the Contract Version section. SWIFT updates the Version of the contract, such as from 2 to 3. The Status of this new version is "Draft."

**Contract**

SetID SHARE Contract ID 0000000000000000000241510 \*Status

**Contract Version**

Version  Status

Approval Due Date

**Step 3: Update the new version of the contract shell**

1. Update the contract. See the two reasons for creating a new version in the overview of this section.
2. In this case, update the new version to reactivate a canceled contract line. To reactivate a canceled contract line, scroll down to the lines section. Press the **Reactivate Line** icon on the particular line.

Line	Item	Description	UOM	Category	Include for Release	Status
1		Hazardous hygiene services	EA	81141802	<input checked="" type="checkbox"/>	Active
2		Supplies	EA	81141802	<input type="checkbox"/>	Cancelled

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

This action will REACTIVATE item line 2 for the contract. Continue? (10400,592)

If you hit Yes, the contract line will be reactivated. If you hit No, no action will be taken and the line will remain inactive or cancelled.

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

Line	Item	Description	UOM	Category	Include for Release	Status
1		Hazardous hygiene services	EA	81141802	<input checked="" type="checkbox"/>	Active
2		Supplies	EA	81141802	<input checked="" type="checkbox"/>	Active

## Step 4: Update the Status and save the contract

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

This action will make the Draft version become the Current version when you Save (10400,591)

If you leave the status as Approved and then hit Save, the Current version will become a History version and this Draft version will become the Current version.

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