

QUICK REFERENCE GUIDE

April 24, 2024

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. If you want to send related documents to contacts, you must be using document types with Authored statuses of “Draft,” “Complete Statuses Only and Draft” and “Approved” 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.

Step 1: Access the Contract Document Management page

1. Navigate to the Document Management page in the Supplier Contracts module.

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.

2. On the Contract Entry page, select the **Find an Existing Value** tab. Enter the Contract ID, then press the **Search** button.
3. On the Search Results section, press the link of the **Contract ID**.
4. 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.

Contract

SetID

SHARE

Contract ID

000000000000000000241536

*Status

Open

*Administrator/Buyer

Contract Version

Version

1

Approval Due Date

Status

Current

New Version

▼ Authored Document

Authored Status

Draft

Document Version

1.01

Sponsor

Maintain Document

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.

View and Edit Options: <input type="button" value="View Document"/> <input type="button" value="Edit Document"/> Add Attachments/Related Documents Document Version History	Review and Approval: <input type="button" value="Route Internally"/> <input type="button" value="Route Externally"/> <input type="button" value="Preview Approval"/> <input type="button" value="Submit for Approval"/> <input type="button" value="Bypass Approvals"/>	Other Document Actions: <input type="button" value="Send to Contacts"/> <input type="button" value="Recreate Document"/> <input type="button" value="Deactivate Document"/>
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2. SWIFT opens the Send to Contacts page.
 - a. Depending on how you want to send the contract document, enter the necessary information.
 - b. Then, select **OK**.

Fields on the Send to Contacts page.

Field Name	Field Description
Delivery Method	Choose "Email" or "Manual." <ul style="list-style-type: none"> • 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	This text 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	This text 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. <ul style="list-style-type: none"> • 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 Name	Field Description
Contacts	<p>Choose the recipients of the document. They can be internal or external contacts.</p> <ul style="list-style-type: none"> • Enter the contact's information to receive the document: Name, Title, Email ID • Add multiple contacts by clicking the Add Row icon. • Check the Selected box.

Send to Contacts

Version 1.01

Administrator [Redacted]

Email Swift.Testing@state.mn.us

*Delivery Method Email ▼

Send as File Type Word Document (.doc) ▼

[Preview PDF](#)

The Send as File type option only applies to Email Delivery Method and when signature document is not available. Otherwise, the prepared signature document will be sent regardless of file type specified here.

Files To Be Sent

- ☒ Current Document
- ☐ Attachments
- ☐ Related Documents

- ☐ Set to Checked Out
- ☒ Send Copy to Administrator

Subject:

Documents for Review - Contract ID: 000000000000000000241536

Description:

This email contains documents for contract: SHARE / 000000000000000000241536.

Contacts

Selected	Contact ID	Name	Title	Email ID	Description
<input checked="" type="checkbox"/>		Marion Anderson	Procurement Coordinator	[Redacted]@state.mn.us	

Select All Contacts Clear All Contacts

[OK](#) [Cancel](#)

SWIFT returns you to the Document Management page.