SWIFT STATEWIDE INTEGRATED
FINANCIAL TOOLS

QUICK REFERENCE GUIDE

February 20, 2024

Catalog Punchout Requisition FAQs

What roles are needed to process Catalog Punchouts?

- The roles needed for non-buyers/requesters are:
    - M_FS_EPRO_REQUESTER
    - M_FS_EPRO_REQ_INQUIRY
- The roles needed for buyers are:
    - M_FS_PO_BUYER
    - M_FS_PO_INQUIRY
    - M_FS_EPRO_REQ_INQUIRY

    Having the buyer role allows for the entering of requisitions. The requester roles are not required.

Are users without SWIFT access able to browse the supplier's catalog?

- Yes, users can browse the supplier's catalog, but each supplier's site may work differently.
    - Innovative Office Solutions has provided a logon to the State of Minnesota catalog. This will show only contracted items and prices.
      https://online.innovativeos.com/thmBootstrapHome.aspx
        - Logon ID: MNBROWSE
        - Password: Please contact us.
    - Other suppliers do not provide a browse logon. Users can visit the individual supplier websites to browse, but the sites will not be limited to State of Minnesota contract items and prices.

What information does the requester need to know to successfully add a requisition?

- To be able to add a requisition, the requester must have the following information available:
    - Origin
    - Doc Type = CTR
    - Billing Location
    - Buyer ID
    - Ship To
    - Funding string or Accounting Tag

Does the Office of State Procurement (OSP) plan to add more suppliers using Punchout functionality?

- Yes, in the future OSP plans to add additional suppliers having the capability for Punchout catalogs.

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Why am I sometimes able to see previous order activity and sometimes not?

- The suppliers use a combination of the Billing Location address and your User ID to track your activity. This means you will see activity based on the Billing Location that is entered on the requisition. This also goes for saving of favorites and other site functionality. You will see differences based on the Billing Location used when accessing the supplier's site. Be sure to use the correct Bill To Location code when looking for previous activity.

How often are requisitions sourced to a Purchase Order?

- Requisitions at an Approved status and Valid budget check status will be processed to a purchase order via a batch job (PO_AutoSource) that will be scheduled to run every two hours throughout the day. The PO_AutoSource is scheduled to run at 8:00 a.m., 10:00 a.m., 12:00 p.m., 2:00 p.m., 4:00 p.m., and 6:00 p.m.

Why can't I copy previously created requisitions or purchase orders?

- Previously created requisitions or purchase orders cannot be copied because they may contain information that has been updated on the supplier's website. Having to create a new requisition for each order ensures product availability as well as current item information and prices.

How do I change or cancel an order sent to the Supplier?

- The punchout process is designed to be human interaction free. Once the order is transmitted to the supplier it is immediately in process to be picked and shipped. If you need to cancel or change an order it is best to receive the shipment and make any needed returns. Should you realize immediately, you may call the supplier's customer service to see if they can assist with any cancels or changes. Be aware that any changes made by the supplier will not be in SWIFT. Change orders submitted to the suppliers may not be processed, and change orders submitted may be seen as a duplicate purchase order in their system and will not be processed.
- Use the Maintain Distributions pages to update the accounting distributions on a punchout purchase order. Making Chartfield updates using the Maintain Distributions pages will not create a change order and keeps the PO Status as Dispatched. See the Maintain Distributions for PO Chartfield Changes Quick Reference Guide available on the MMB website under SWIFT Training Guides.

How are orders processed using multiple ship-to locations?

- The use of multiple ship-to locations on an order vary by the supplier. The suppliers have requested that multiple ship-to locations NOT be used. Please submit a separate order for each ship-to location.

How do I order non-contract items using Punchouts?

- You cannot use the punchout process to order non-catalog items. Only contracted catalog items will be available on the supplier's site.

How do I order from the TG/ED/VO suppliers that are in partnership with the Grainger contract?

- The Grainger punchout process should only be used for purchasing from Grainger and Abundant 180. You cannot use the punchout to Grainger for ordering from the other TG/ED/VO suppliers on the contract. Continue ordering from the partnered TG/ED/VO suppliers as currently processed.

How do I ship items to a location not available in SWIFT?

- Use the "Add One Time Address" link on the Requisition Settings page to enter a one-time address. You must use the "ONETIME" address location as the Ship To along with entering the address information using the Add One Time Address link.
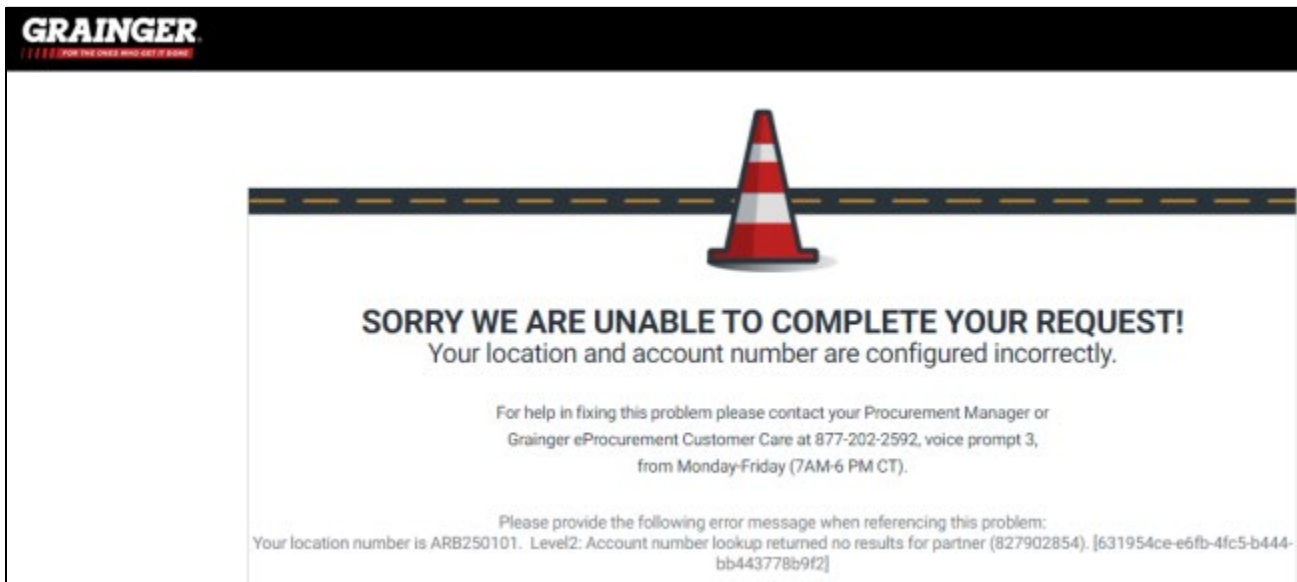

My agency is currently receiving summary invoices from one or more suppliers. Is this still possible?

- No, each purchase order sent to the supplier will be invoiced accordingly. Summary invoicing is no longer available.

When logging on to Grainger I receive a "SORRY WE ARE UNABLE TO COMPLETE YOUR REQUEST!" message.

- The above message means the Bill To Location being used on the requisition is not an active account in Grainger's catalog system.

- Please contact the Grainger Customer Care at 877-202-2592, voice prompt 3 to have the billing location added to the State of Minnesota accounts.

Are Punchouts Required?

- Yes, Punchouts are required for ordering from the Innovative and Grainger contracts. Allowable exceptions are:
    - Ordering from the TG/ED/VO suppliers partnering with Grainger (except Abundant 180).
    - Inventory items for those agencies using the SWIFT Inventory module.
    - Non-contract items from Innovative or Grainger.

Can a blanket order be used for Punchout purchases?

- Blanket orders cannot be used for punchouts. Each requisition will be sourced to a new purchase order.

My agency is wanting invoices sent using email instead of postal mail, is this possible?

- Yes the suppliers will send emailed invoices if requested. Since the suppliers use the Billing Location to associate the accounts, requests for email invoicing is by each Billing Location and sent to a shared email address. Invoices will NOT be emailed to individual staff email addresses.