

## QUICK REFERENCE GUIDE

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### Understand the Purchase Order Header Status Values

Like all header values, the *Purchase Order Header Status* (i.e., *PO Status*) applies to an entire purchase order. The *PO Status* is a high-level indication of where the purchase order is in its life cycle. A typical purchase order does not go through every *PO Status*.

The screenshot shows a 'Purchase Order' header with the following details: Business Unit G1001, Origin 514 (with a search icon), Management Services, PO ID 3000004709, and an 'Approval Exception' link. The 'PO Status' is 'Approved' and the 'Budget Status' is 'Valid'. There are also icons for a document and a red 'X'.

This guide describes how the PO Status values change as you initially process a purchase order in SWIFT. It also describes how the PO Status can change after editing it.

### How the PO Status Values change as you initially process a purchase order in SWIFT

- **Initial:** A purchase order has a *PO Status* of “Initial” when you add information to a new purchase order.
- **Open:** The *PO Status* changes to “Open” after you have added the required components and saved it.
- **Pending Approval/Approved:** After you save a purchase order and submit it for approval, SWIFT changes the *PO Status* to either “Pending Approval” or “Approved” depending upon if your agency the agency uses self-approvals.
- **Approved:** When your agency approves a purchase order, SWIFT changes *PO Status* from “Pending Approval” to “Approved”.
  - Submit the purchase order for budget checking. When it passes the budget check, the *PO Status* remains “Approved”. SWIFT updates the *Budget Status* from “Not Chk’d” to “Valid”. If the purchase order does not pass the budget check, the *Budget Status* will be “Error”.
  - When the *PO Status* is “Approved” and the *Budget Status* is “Valid”, you can dispatch it.
- **Dispatched:** When you dispatch the purchase order, the *PO Status* becomes “Dispatched”.

## How the PO Status can change after you edit a purchase order

1. **Change Order:** When you create a change order, the *PO Status* needs to return to “Approved”.
  - If the change decreases the price or amount, the status remains “Approved”.
  - If the change increases the price or amount, resubmit the purchase order for approval unless you are set up for self-approvals.
  - Not all changes to a purchase order will trigger a change order that will require approval or budget checking, and dispatching.
  - If you redispach a purchase order, SWIFT may resubmit it to the supplier. SWIFT will not resubmit it for blanket purchase orders.
  - You may need to budget check a purchase order after creating a change order.
2. **Complete:** Closing a purchase order changes the *PO Status* to “Complete”.
3. **Pending Cancel:** Canceling a dispatched purchase order changes the *PO Status* to “Pending Cancel” until the budget check occurs during the nightly batch. Then the *PO Status* is “Canceled”.