

## QUICK REFERENCE GUIDE

April 20, 2021

### Use the Maintain Distributions Search

If you have a dispatched purchase order that needs updates to the distribution information, use the *Maintain Distributions* page.

If you update Chartfields using the *Maintain Distributions* page, SWIFT will not create a change order. It keeps the *PO Status* as “Dispatched.” The benefit of using the *Maintain Distributions* page is that SWIFT will not send the updated purchase order to its supplier.

You can also use the *Maintain Distributions* search page to find the distribution information on an individual purchase order in your Business Unit.

**IMPORTANT!** Make sure to use the *Maintain Distributions* page to update distribution information on a dispatched purchase order.

Do not select the **Change Order** icon on the *Maintain Purchase Order* page for these updates.

There are SWIFT reference guides to review if you have issues with this process.

- Handle Budget Check Errors on Purchase Orders
- Category Codes Overview

Steps to complete

- Step 1: Navigate to the Maintain Distributions page
- Step 2: Find the purchase order and update the distribution information in the Maintain Distributions page
- Step 3: Search for and budget check the purchase order in the Maintain Purchase Order page

## Steps to use the Maintain Distributions search page

### Step 1: Navigate to the Maintain Distributions page

1. Navigate to the *Maintain Distributions* page.

Navigation Option	Navigation Path
Navigation Collection	Procurement, Purchasing, Purchase Order, Left menu, Maintain Distributions page.

2. On the *Maintain Distributions* search page, enter values in the fields such as *Business Unit* and *PO ID*. Then, press the **Search** button.

**Maintain Distributions**

Enter any information you have and click Search. Leave fields blank for a list of all values

[Find an Existing Value](#)

▼ **Search Criteria**

Business Unit = G1001

PO ID begins with 300000808

Line Number =

Schedule Number =

SetID begins with

Contract ID begins with

PO Status =

Short Supplier Name begins with

Supplier ID begins with

Supplier Name begins with

Buyer begins with

PO Reference begins with

More Information begins with

Ship To Location begins with

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

## Step 2: Find the purchase order and update the ChartFields distribution information in the Maintain Distributions page

1. If you didn't use a *PO ID* in your search, SWIFT opens up the *Search Results* section at the bottom of the page. Press the *PO ID* of an individual purchase order you wish to view.

Search Results							
View All							
Business Unit	PO ID	Line Number	Schedule Number	SetID	Contract ID	Release Number	PO Status
G1001	3000006089	1	1	SHARE	00000000000000000000166457	4	Dispatched
G1001	3000005998	1	1	SHARE	00000000000000000000185967	1	Dispatched
G1001	3000005958	1	1	SHARE	00000000000000000000166457	3	Dispatched
G1001	3000005838	1	1	SHARE	(blank)	0	Dispatched

2. SWIFT opens up the *Maintain Distributions* page for that purchase order.
  - Review and update the ChartField information as needed for each line on the purchase order.
  - Press the **Save** button after updating the purchase order.

The screenshot shows the 'Maintain Distributions' page in SWIFT. On the left sidebar, the 'Add/Update POs' option is highlighted. The main content area displays details for a purchase order: Business Unit G1001, PO ID 3000006086, Supplier INDEPENDEN-044, and Buyer Training User TRN04. Line 1 is selected, showing a Schedule of 1, a Schedule Qty of 1.0000, a Merchandise Amount of 6,000.00 USD, and a Doc. Base Amount of 6,000.00 USD. Below this, a 'Distribution' section is visible with a table containing one row: Dist 1, Status Open, Percent 100.0000, Merchandise Amt 6,000.00, Curr USD, \*GL Unit MN001, Fund 2001, Fin DeptID G1037200, Appropriation ID (CF3) G100019, and \*Account 413001. At the bottom of the page, the 'Save' button is highlighted.

- Using the left menu, navigate to *Add/Update POs*.

## Step 3: Search for and budget check the purchase order in the Maintain Purchase Order page

SWIFT opens the *Purchase Order* search page.

1. On the *Find an Existing Value* tab, enter your *Business Unit* and *PO ID*. Select **Search** at the bottom of the page.

Maintain Purchase Orders

**Add/Update POs**

Buyers Workbench

Print POs

Maintain Distributions

PO Inquiry

### Purchase Order

Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value** Keyword Search Add a New Value

**Search Criteria**

Business Unit = G1001

PO ID begins with 3000008088

Origin begins with

Search

2. SWIFT opens the *Maintain Purchase Order* page. The *Budget Status* is now “Not Checked.” Select the **Budget Check** icon to budget check the purchase order.

Maintain Purchase Order

### Purchase Order

Business Unit G1001 Origin 509 Accounting Services PO Status Dispatched

PO ID 3000008088 Approval Exception

Budget Status Not Chkd

Budget Check

You have successfully updated ChartFields on a dispatched purchase order using the *Maintain Distributions* page.