

QUICK REFERENCE GUIDE

February 20, 2024

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](#)

This Quick Reference Guide provides the steps to use the Maintain Distributions Search to update the distribution information on a dispatched purchase order.

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. At the bottom of the page, press the **Search** button.

Maintain Distributions

Find an Existing Value

▼ **Search Criteria**

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

Recent Choose from recent searches

Searches

*Business Unit = G1001

PO ID begins with 3000008052

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

1. 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**

2 rows - Business Unit "G1001" PO ID "8052"

Business Unit	PO ID	Line Number	Schedule Number	SetID	Contract ID	Release Number	PO Status	Short Supplier Name	Supplier ID	Supplier Name
G1001	3000008052	1	1	SHARE	(blank)	0	Dispatched	RHEMA SY-001	0001035000	RHEMA SYSTEMS INC

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

Distribution

Chartfields Details/Tax Asset Information Req Detail Statuses Budget Information

Dist	Status	Percent	PO Qty	Merchandise Amt	Curr	*GL Unit	Fund	Fin DeptID
1	Open	100.0000	7.5000	4,275.00	USD	MN001	5800	G1036101

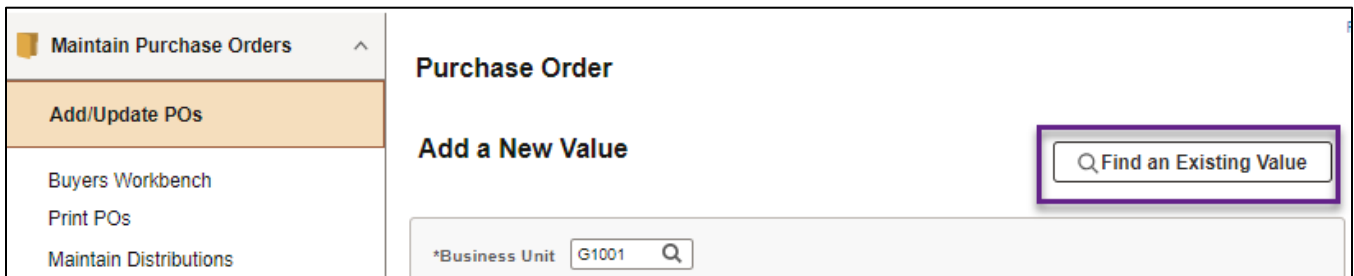
Save Return to Search Previous in List Next in List Notify

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

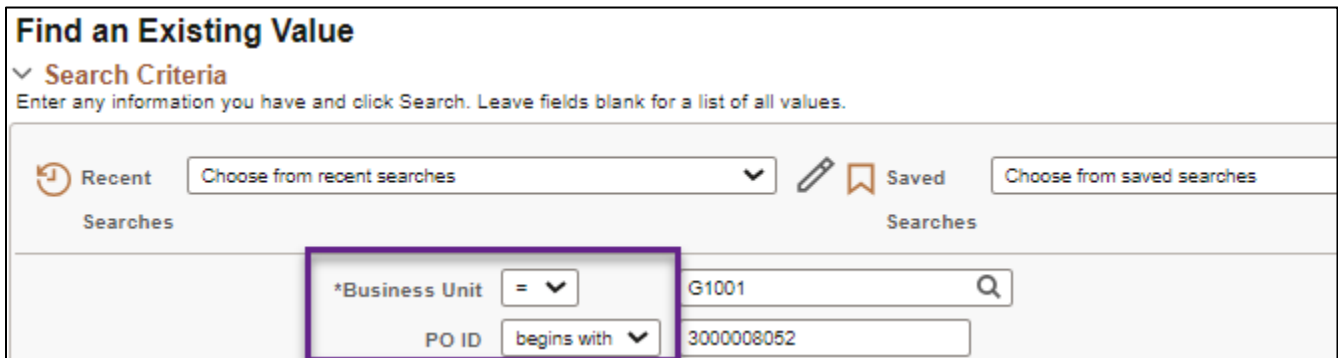


Step 3: Search for and budget check the purchase order in the Maintain Purchase Order page

1. SWIFT opens the Purchase Order search page. Select the **Find an Existing Value** button.



2. SWIFT opens the Find an Existing value page. Enter your Business Unit and PO ID. Select **Search** at the bottom of the page.

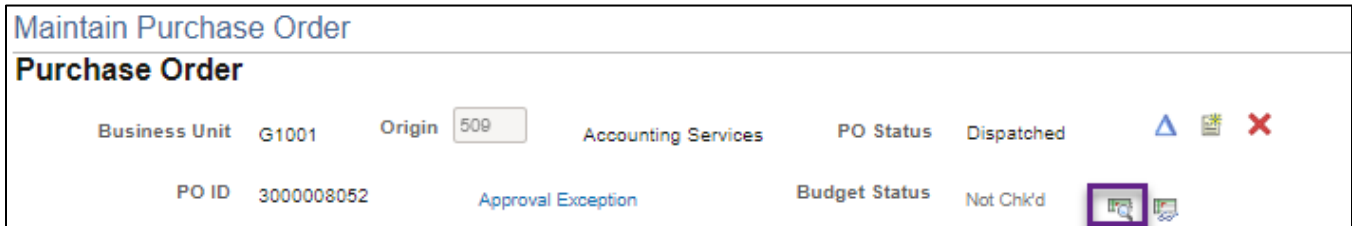


3. At the bottom of the page, SWIFT displays the Search Results. Select the PO ID.

Search Results
1 rows - Business Unit "G1001" PO ID "3000008052"

Business Unit	PO ID	Origin	Purchase Order Date	PO Status	Short Supplier Name	Supplier ID	Supplier Name
G1001	3000008052	509	01/29/2024	Dispatched	RHEMA SY-001	0001035000	RHEMA SYSTEMS INC

4. 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.



5. SWIFT updates the ChartFields on the dispatched purchase order using the Maintain Distributions page.