Verify Default Values on Purchase Orders

Buyers are responsible to make sure correct values are entered into all of the fields of a purchase order. Some fields on purchase orders default to predetermined values. Review default values on the header and every line on each purchase order to ensure that they fit the requirements.

This reference guide describes defaults and their default values on purchase orders. It also describes how to review and update each of the fields.

Consult with other reference guides if you want to update the Freight Terms, Asset Information or Sales/Use Tax information.

Steps to complete:
- Step 1: Access the Purchase Order page in SWIFT
- Step 2: Verify or update default values on all lines of a purchase order

### Fields on purchase orders with defaults

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<td>Receiving</td>
<td>Defaults to “Required”.</td>
<td>Receiving tab on the line</td>
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<tr>
<td>Freight Terms</td>
<td>Defaults from Business Unit.</td>
<td>Schedule page on the line on the Freight tab</td>
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<tr>
<td>Sales Tax</td>
<td>Defaults from Ship To Location.</td>
<td>Schedule page on the line on the Sched Sales/Use tax icon</td>
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<tr>
<td>Account Code</td>
<td>Defaults from Category Code.</td>
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<tr>
<td>• AM Unit</td>
<td>AM Unit (Asset Management Business Unit). Both default from Category Code if configured. Verify that the item is an asset.</td>
<td>Distribution page on the line on the Asset Information Tab</td>
</tr>
<tr>
<td>• Asset Profile ID</td>
<td></td>
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Steps to review and/or update default fields on a purchase order

Step 1: Access the Purchase Order page in SWIFT

1. Navigate to the Purchase Order page.

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</table>

2. On the Purchase Order page, select the Find an Existing Value tab. Enter search items such as the PO ID. Press the Search button.

3. SWIFT displays the Search Results section. Select the PO ID of the purchase order to review.

- If you update a value, select the Save button.
Step 2: Verify or update default values on all lines of a purchase order

1. **Category Code:** Several values default from it.
   - Verify that the **Category Code** is accurate. It is located on the **Lines** area of a purchase order. It is on the **Details** tab.

2. **Account Code:** The **Account Code** defaults from the **Category Code**.
   - It is located on the **Distribution.ChartFields** area of a purchase order. To access it, go to the **Lines** section. On the **Line Details** tab, select the **Schedules** icon.

   - SWIFT displays the **Schedule** page, select the **Distributions.ChartFields** icon.

   - SWIFT displays the **Distribution** page. On the **ChartFields** tab, verify the correct **Account Code** for the purchase order.

The **Category/Account** relationship restricts the number of valid **Accounts** for a given category. You can only select a valid **Account**.
3. **AM Unit and Profile ID:** They default from the *Category Code* if configured.
   - They are located on *Asset Information* on the *Distribution* tab of the *Schedules* page.
   - Similar to locating the *Account*, go to the *Schedule* page, select the *Distributions/ChartFields* icon.

   - SWIFT displays the *Distribution* page. Select the *Asset Information* tab.

   - Consult with your agency's asset management office before updating asset information.
     - Verify the *AM Unit* and *Profile ID* or remove them if the item is not an asset.
     - The *Tag Number* should be blank.
     - The *Capitalize* box should not be checked.
     - *Employee ID* is typically used if an asset is assigned to a specific employee.

   **IMPORTANT!** If you want to update the *Asset Information*, review the *Purchase an Asset* reference guide.

4. **Freight Terms:** This field defaults from the *Business Unit*.

   *Freight terms* defaults to “FOB_PALLOW” for all purchase orders. This means that the supplier should not bill the state separately for freight.

   - If the supplier will be billing for freight, then update the *Freight Terms* to “FOB_PADD”. This allows your agency’s Accounts Payable to process a payment for freight.

   **IMPORTANT!** Consult with the *Add Freight and Miscellaneous Charges to a Purchase Order* reference guide to update the *Freight Terms*. SWIFT requires updates in several places on a purchase order.

   - *Freight Terms* are located on *Freight* tab of the *Schedules* page. Start by selecting the *Schedules* icon, which is on the *Line Details* tab of the *Lines* section of a purchase order.
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- SWIFT displays the Schedules page. On The Freight tab, you can see the Freight Terms.

**NOTE:** Once you dispatch a purchase order, SWIFT locks the Freight Terms field. If you need to update the Freight Terms, you must first set up a change order on the schedule before SWIFT opens up that field.

5. **Receiving:** All purchase orders default to “Required” on the Receiving Required field. A buyer may update the Receiving Required field from “Required” or “Do Not”. Update this value on the Receiving tab on the Lines section of a purchase order.

6. **Sales and Use Tax:** This field defaults from the Ship To field.

- The Ship To field impacts sales and use taxes. Verify the Ship To field, which is located on the Ship To/Due Date tab on the Lines section of a purchase order.

- To review the Sales and Use Tax values, go to the Sales/Use Tax Information for Schedule page. It is located on Sched Sales/Use Tax icon from the Schedules page. Select the Schedules icon on the Details tab on the Lines section of the purchase order.

SWIFT displays the Sales/Use Tax Information for Schedule page. Verify or update the Tax Applicability and Ultimate Use Tax values.

IMPORTANT! If you want to update these values, review the Update the Sales and Use Tax Settings on Purchase Orders reference guide.

You have successfully reviewed the default values on a purchase order.