

QUICK REFERENCE GUIDE

Updated November 1, 2019

Create an Event using Line Item Defaults

The **Line Item Defaults** link allows buyers to speed up the process of adding Line/Schedule (Details) information to lines within an event. Use this link to add additional information to multiple lines on an event.

IMPORTANT: SWIFT retains the Line Item defaults only for an individual event.

This guide discusses Line Item Defaults in detail and provides high-level information related to creating an event. If you have questions, review other SWIFT Reference Guides for creating an event that meets your agency's needs.

Steps to complete

- Step 1: Access the Event Summary page
- Step 2: Enter information on the header of the Event Summary page
- Step 3: Enter Information in the Define Event Basics section
- Step 4: Enter information on the Configure Line Items section
- Step 5: Complete the remaining sections on the event

Steps to create an event using Line Item Defaults

Step 1: Access the Event Summary page

1. Navigate to the **Add a New Value** page.

Navigation Options	Navigation Path
Navigation Collection	Procurement, Strategic Sourcing, Create Event, Create Events page, Add a New Value tab.
WorkCenter	Procurement, Strategic Sourcing, Contract/Sourcing WorkCenter. Left Menu, Sourcing, Create Events page, Add a New Value tab.

2. On the **Add a New Value** page, enter the required information and press the **Add** button.

Step 2: Enter information on the header of the Event Summary page

SWIFT displays the **Event Summary** page. Enter the required information on the header.

Step 3: Enter information in the Define Event Basics section

Review and enter information in the various links as needed.

Step 4: Enter information on the Configure Line Items section

On the **Event Summary** page, select the **Item Line Defaults** link in the **Configure Line Items** section.

Step 2: Configure Line Items

Create line listings for this event.

Select this link second.

Select this link first.

[* Line Items](#)

[Item Line Defaults](#)

1. SWIFT displays the **Event Line Defaults** page. Enter information that you wish to show up on all event lines in these places:
 - a. **Line/Sched Defaults:** You can default items such as the *Due Date*, *Ship To Location*, *Ship Via* and *Freight Terms*.
 - b. **Line Bid Factor Defaults:** If you wish to add line-level bid factors, change the *Bid Factor Defaults Option* to “Apply Bid Factor Defaults”.
 - c. **Bid Factors:** If you wish to add a line-level bid factor, select a bid factor from the list. Check the **Display Bid Factor** and **Response Required** boxes as appropriate.
 - d. Press the **OK** button.

Event Line Defaults

Business Unit R2901 Event ID NEXT Round 1 Version 1 Event Format Buy Event Type RFX

Line/Sched Defaults

Default Options: Default

Due Date: [Field]

Ship To Location: [Field]

Ship Via: [Field]

Alternate Units of Measure: Not Allowed

Ship From Location: [Field]

Freight Terms: [Field]

Line Bid Factor Defaults

Bid Factor Defaults Option: Apply Bid Factor Defaults

Override Start Price Weight

Ignore Setup Default Rules

Append To on Copy From Event

Start Price Weighting Default: 0.00000

Bid Factors

Seq Nbr	Bid Factor	Question	Type	Display Bid Factor?	Response Required	Weighting
1	MC_EXT_MAKE&M	MAKE AND MODEL: List the year, make, and model of the equipment offered.	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0.00000

Add Bid Factors by Group

OK Cancel Refresh

- SWIFT returns you to the **Event Summary** page.
- Press the **Line Items** link on the **Configure Line Items** section.

Step 2: Configure Line Items

Create line listings for this event.

Select this link second.

Select this link first.

[* Line Items](#)

[Item Line Defaults](#)

2. SWIFT displays the **Line Items** page.
 - On the **Line Items** page, enter the details on the **Basic Definition** and **Advanced Definition** tabs.

- On the **Advanced Definition** tab, SWIFT displays all line *Detail* and line *Bid Factors* on each event line.

- Select the **Save Event Changes** button.
- Press the **Return to Event Overview** link. SWIFT returns you to the **Event Summary** page.

Step 5: Complete the remaining sections on the event from the Event Summary page

Press the **Save Event Changes** button after updating each section.

1. Review and update the **Select Bidders to Invite** section. Make sure that the **Public Event** box is checked if you want this event to appear on the Supplier Portal for public bids.
2. Review and update the **Invite Collaborators** section if you are using pre-post Collaboration.
3. Post the completed event.

SWIFT posts the event on the Supplier Portal for bidders to review.

You have now successfully created an event using Line Item Defaults.