

## QUICK REFERENCE GUIDE

February 20, 2024

### 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 the [Strategic Sourcing](#) Quick Reference Guides for creating an event that meets your agency’s needs.

#### Step 1: Access the Event Summary page

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

Navigation Options	Navigation Path
<b>Navigation Collection</b>	Procurement, Strategic Sourcing, Create Event, Create Events page, Add a New Value page.
<b>WorkCenter</b>	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

1. 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](#)

2. 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 G1001    Event ID NEXT    Round 1    Version 1    Event Format Buy    Event Type RFX

**Line/Sched Defaults**

Default Options: Default

Due Date:

Ship To Location: G104THFL00

Ship Via:

Alternate Units of Measure: Not Allowed

Ship From Location:

Freight Terms:

**Line Bid Factor Defaults**

Bid Factor Defaults Option: **Apply Bid Factor Defaults** Change only to add a bid line level bid factor

Override Start Price Weight    Start Price Weighting Default: 0.00000

Ignore Setup Default Rules

Append To on Copy From Event

**Bid Factors**

Seq Nbr	*Bid Factor	Question	Type	Display Bid Factor?	Response Required	Weighting		
1	AC_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

3. 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

[\\* Line Items](#)

[Item Line Defaults](#)

4. SWIFT displays the **Line Items** page.

a. On the Line Items page, enter the details on the **Basic Definition** tab for each line.

Line	Item ID	Description	Category	*UOM	*Qty	Start Price	Ext. Amount
1		Furniture	56141500	EA	10.0000	100	

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

Line	Item ID	Description	Bidder Display Seq #	Item SetID	Belongs to or Contains	Details	Bid Factors	Constraints
1		Furniture	1	SHARE		Details	Bid Factors	No

Event Total: 10000.0000 USD      Line Weighting Total: 0 %      Remaining Weight: 100%

Group Selected Lines: [ ]      OK

< Return to Event Overview      GoTo: [ ]      Go

Save Event Changes

- c. Select the **Save Event Changes** button.
- d. Press the **Return to Event Overview** link.

5. SWIFT returns you to the Event Summary page.

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

1. Press the Save Event Changes button after updating each section.
2. 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.
3. Post the completed event. SWIFT posts the event on the Supplier Portal for bidders to review.