SWIFT STATEWIDE INTEGRATED
FINANCIAL TOOLS

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.

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.

- SWIFT returns you to the **Event Summary** page.

- Press the **Line Items** link on the **Configure Line Items** section.

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.