

When entering information into the Purchase capsule of the AwareManager jxt some information will enter itself for you in a process called **defaulting**. The following is a detailed description of this process in terms of how it relates to adding purchase orders:

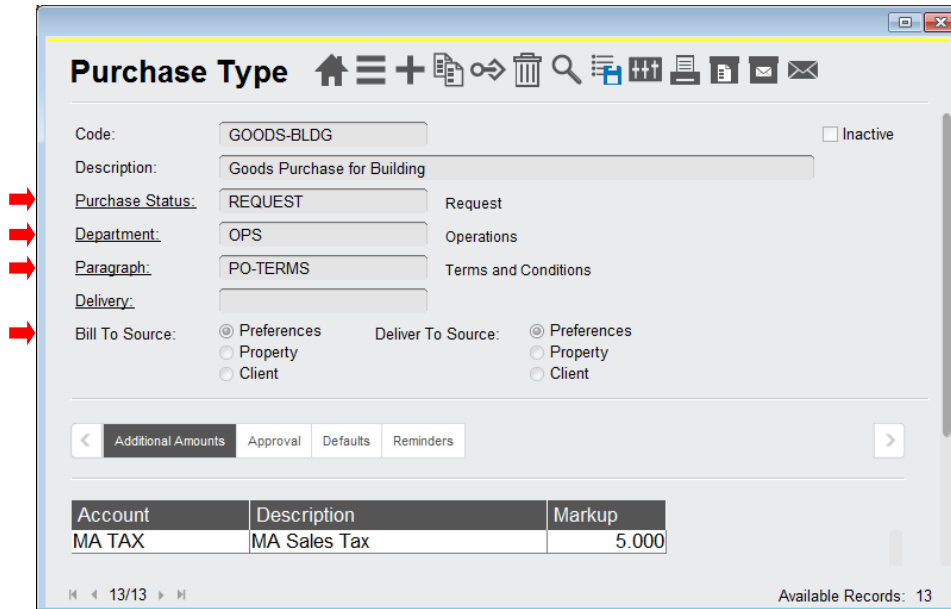
Defaulted Fields

When you first add a new Purchase order most of the fields are blank. After you enter the first piece of information (e.g. the Purchase Type code *GOODS-BLDG*) and press Tab, some fields may default including the **Purchase Status**, **Department**, **Bill To**, **Deliver To**, **Additional Amounts**, and **Approval**. You can change defaulted information at any time.

Request Number:	11-000343	100BE
Purchase Type:	<u>GOODS-BLDG</u>	Goods Purchase for B...
Purchase Status:	<u>REQUEST</u>	Request
Vendor:		
Person:	Person	
Tenant:		
Property:		
Unit:		
Department:	OPS	Operations
Bill To:	50 Congress Street, Suite 380 Boston, MA 02109	
Deliver To:	50 Congress Street, Suite 630 Boston, MA 02109	

The Purchase Type entered was GOODS-BLDG and all of the information linked to that Purchase Type filled in automatically – this is called **DEFAULTING**.

1. The AwareManager JXT looks up the Purchase Type record that is entered.
2. If there are values in the **Purchase Status**, **Department Paragraph**, **Bill To Source**, **Deliver To Source**, **Additional Amounts**, and **Approval** fields it defaults them onto the work order.



Purchase Type

Code: GOODS-BLDG Inactive

Description: Goods Purchase for Building

Purchase Status: REQUEST Request

Department: OPS Operations

Paragraph: PO-TERMS Terms and Conditions

Delivery:

Bill To Source: Preferences Property Client

Deliver To Source: Preferences Property Client

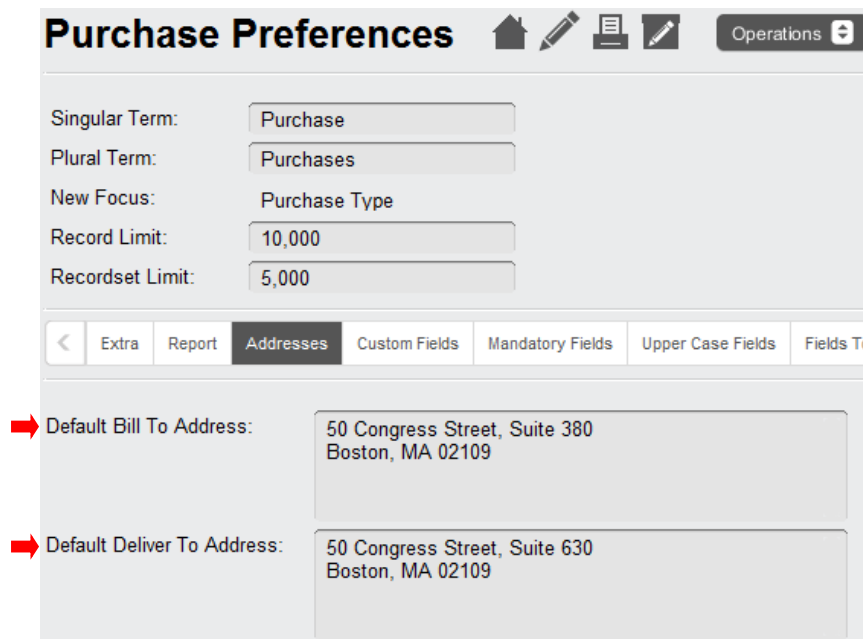
Additional Amounts | Approval | Defaults | Reminders

Account	Description	Markup
MA TAX	MA Sales Tax	5.000

Available Records: 13

This is how REQUEST and OPS appeared on the purchase order without having to enter them.

3. The Bill To Source and Deliver To Source fields on the Purchase Type define where the Bill To and Deliver To addresses should come from. In this case GOODS-BLDG is set to Preferences. This means that the address is coming from the Purchase Preferences.



Purchase Preferences

Singular Term: Purchase

Plural Term: Purchases

New Focus: Purchase Type

Record Limit: 10,000

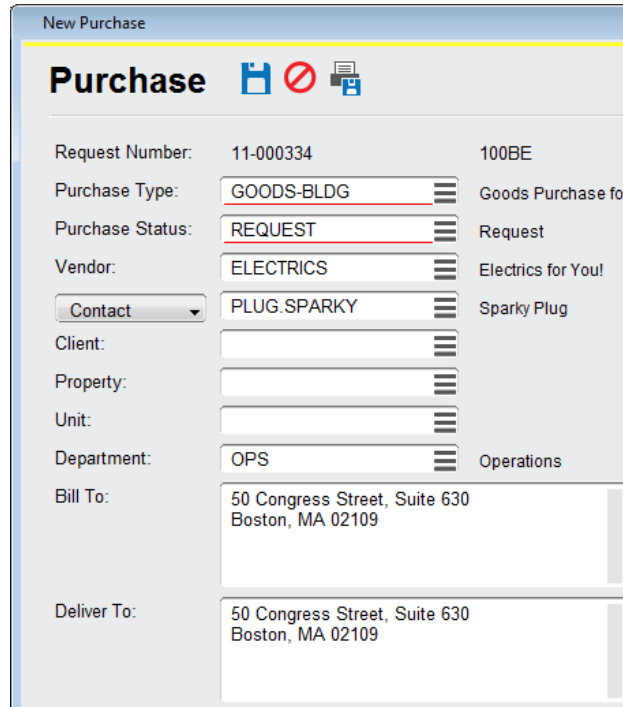
Recordset Limit: 5,000

Extra | Report | **Addresses** | Custom Fields | Mandatory Fields | Upper Case Fields | Fields To

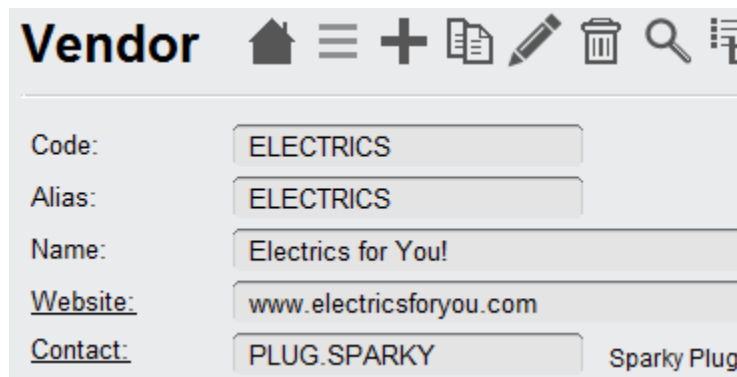
Default Bill To Address: 50 Congress Street, Suite 380
Boston, MA 02109

Default Deliver To Address: 50 Congress Street, Suite 630
Boston, MA 02109

- If you then enter a Vendor code on the Purchase record, it may default the *Contact*, *Department*, *Delivery*, *Tracking Number*, *Customer Number*, *Project*, and *Contract* associated with that Vendor.













The Vendor record is where Sparky Plug's *Name* came from that appeared on the Purchase order.



- If you then enter a Client/Tenant code, the *Property* and *Unit* from the Client record will default onto the Purchase record.




This is how Property 100-S BEAC and Unit 100-S BEACON-760 appeared on the purchase record when BSTNPLNNG was entered.

Client          

Code: 100BE
Alias:
Name:
Tenant Type: Office Tenant
Website:
Phone:
Fax:
Address:
City:
State:
Zip Code:
Country:

Property: 100 Beacon Street So...
Unit:

Change Purchase

Purchase   

Request Number: 11-000334 100BE
Purchase Type: Goods Purchase for E
Purchase Status: Request
Vendor: Electrics for You!
 Sparky Plug
Client: Boston Planning Divis
Property: 100 Beacon Street So
Unit: Suite 760
Department: Operations
Bill To:
Deliver To: