

QUICK REFERENCE GUIDE

Updated November 1, 2019

Create a Purchase Order Receipt

In SWIFT, a receipt tracks the quantity or amount received against a purchase order. Receiving includes determining if the purchase is an asset. This guide provides the steps to create a purchase order receipt.

Steps to complete:

- Step 1: Navigate to the Receiving page
- Step 2: Use the Select Purchase Order page to locate the purchase order to receive
- Step 3: Review or update the details of the receipt
- Step 4: Save the receipt

Step 1: Navigate to the Receiving page

1. Navigate to the **Receiving** page.

Navigation Options	Navigation Path
Navigation Collection	Procurement, Purchasing, Receipts. The Receiving page defaults.

2. On the **Receiving** page, select the **Add a New Value** tab. Enter the *Business Unit*. Select the **Add** button.

The screenshot shows the 'Receiving' page interface. At the top, there are three tabs: 'Find an Existing Value', 'Keyword Search', and 'Add a New Value'. Below the tabs, there is a 'Business Unit' input field with the value 'G1001' and a search icon. Below that is a 'Receipt Number' input field with the value 'NEXT'. There is a 'PO Receipt' checkbox which is checked. At the bottom left, there is a green 'Add' button.

Step 2: Use the Select Purchase Order page to locate the purchase order to receive

SWIFT opens up the **Select Purchase Order** page.

- Enter search items such the *PO ID*.
- Select **Search**.

SWIFT opens up the **Retrieved Rows** area at the bottom of the **Select Purchase Order** page.

- Check the **Sel** button for the purchase order row you wish to receive.
- If there are many rows, you can check the box near to the **Select All** link.
- Then, press the **OK** button.

Sel	PO Unit	PO ID	Origin	Line	Sched	Release	Due Date	PO Qty	Prior Receipt	Item	Description
<input checked="" type="checkbox"/>	R2901	3000110980	A55	4	1	4	02/28/2019	1.0000	9.0000		2017-103-02 FY18 URBAN FIA 211

Step 3: Review or update the details of the receipt

SWIFT creates a **Maintain Receipt** page for the receipt. There are two places to review or update the details of a receipt on the **Maintain Receipt** page.

1. Header Details

SWIFT defaults the *Receipt Date* to the date the receipt was entered. To update the date to the actual date the goods or services were received, select the **Header Details** link.

- SWIFT opens up the **Header Details** page. Update the *Receipt Date* to the actual receipt date and select the **OK** button. SWIFT returns you to the original **Maintain Receipt** page.

Header Details

Business Unit	R2901	*Receipt Date	03/27/2019	Receipt Time	9:41AM
Receipt ID	NEXT	User ID	00744478	Origin:	
Receive Source	On-line	Receipt Status	Open		
Supplier	0000302683				

2. Receipt Lines tab

Review the line tabs as needed. Update any fields as necessary. For example, update the price or quantity.

Receipt Lines

🔍
1-1 of 1
View All

Line	Item	Description	Receipt Qty	Receipt Price	Accept Qty	Status	Close Short	Serial	Device Track	Device Track	
1		2017-103-02 FY18 URBAN FIA 211	1.0000	0.01000	1.0000	Open	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Device Track	✖

Interface Receipt
 Run Close Short
 Interface Asset Information

Save
Notify
Refresh
Add
Update/Display

Step 4: Save the Receipt

After you enter or review all of the necessary fields, save the receipt.

- Select the **Save** button at the bottom of the page.
- Once you save it, SWIFT updates the *Receipt Status* to “Fully Received”. SWIFT assigns it a *Receipt ID*. It is now available to accounts payable for voucher creation.

Maintain Receipts

Receiving

Business Unit	G1001	Receipt Status	Fully Received	✖
Receipt ID	0000013543	Header Comments/Attachments	Activities	

You have successfully created and saved a purchase order receipt.