

QUICK REFERENCE GUIDE

November 1, 2019

Use the Receipt Document Status Inquiry

Agencies can use this inquiry to see the status of any procurement documents associated with an individual receipt. Procurement documents include supplier contracts, purchase orders and vouchers. On this inquiry, SWIFT will search for receipts with the *Status* of “Moved”, “Canceled” and “Fully Received”.

Receipt Header Status Values

Status Values	Status Definition
Open	Not all edits have passed. One or more receipt lines are in “Open” status.
Received	All edits have passed. All lines are in “Received” or “Canceled” status.
Hold	Receipt is on hold until released by user.
Moved	Receipt has been processed by SWIFT
Canceled	All lines are canceled. Canceling cannot be reversed.

This guide lists the steps to use the Receipt Document Status Inquiry in the Receipts module in SWIFT.

Steps to complete

- Step 1: Navigate to the Receipt Document Status Inquiry page
- Step 2: Review receipt documents on the Document Status page

Steps to use the Receipt Document Status inquiry

Step 1: Navigate to the Receipt Document Status Inquiry page

1. Navigate to the **Receipt Document Status Inquiry** page.

Navigation Options	Navigation Path
Navigation Collection	Procurement, Purchasing, Receipts. Left menu, Receipt Inquiry, Document Status. Receipt Document Status Inquiry page appears.

- On the **Receipt Document Status Inquiry** page, enter information in the search criteria fields.
- Then, select **Search**.

Fields on the Receipt Document Status Inquiry page. Required items are marked with an asterisk “*”.

Field	Description
* Business Unit	You must specify the Business Unit. The primary Business Unit will default. It can be changed.
Receipt Number	This is SWIFT’s Receipt ID, which is identified by an ID that is unique within a business unit.

Field	Description
Bill of Lading	SWIFT does not use this feature.
Carrier ID	SWIFT does not use this feature.
Packing Slip	SWIFT does not use this feature.
User ID	This is the Employee ID
Received Date	The date when the receipt was created in SWIFT.
Receipt Source	SWIFT does not use this feature.
Receipt Status	SWIFT will search for receipts with the Status of Moved, Cancelled and Fully Received.
Ship To Location	Indicates where the supplier should deliver physical items.
Supplier ID	SWIFT identification number for supplier. A supplier is the supplier of the goods or services.

Receipt Document Status INQ
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Business Unit = G1001

Receipt Number begins with 0000014754

Bill of Lading begins with

Carrier ID begins with

Packing Slip begins with

User ID begins with

Received Date =

Receive Source =

Receipt Status =

Ship To Location begins with

Supplier ID begins with

Short Supplier Name begins with

Case Sensitive

Search Clear Basic Search Save Search Criteria

- If you select multiple options, SWIFT displays the **Search Results** section. It contains receipts that match your search criteria. SWIFT will only show the first 300 results. Select the desired *Receipt Number*.

Search Results

Only the first 300 results can be displayed.

View All 1-100 of 300

Business Unit	Receipt Number	Bill of Lading	Carrier ID	Packing Slip	User ID	Received Date	Receive Source	Receipt Status	Ship To Location	Supplier ID	Short Supplier Name
G1001	0000014842	(blank)	(blank)	(blank)	01166518	06/11/2018	On-line	Moved	G104THFL00	H550000000	HUMAN SERV-001
G1001	0000014843	(blank)	(blank)	(blank)	00460227	06/11/2018	On-line	Moved	G104THFL00	0000234732	IMPROVE GR-001

Step 2: Review receipt documents on the Document Status page

SWIFT displays the **Document Status** page of your chosen *Receipt Number*.

1. Confirm that this is the correct receipt to review.
 - On the header, SWIFT shows you which documents are associated with the receipt.

Document Status

Business Unit	G1001	Receipt Number	0000014754
Document Date	06/01/2018	Status	Moved
Currency	USD	Document Type	Receipt
Short Supplier Name	CATALYST-008	Merchandise Amt	358.00
Source	On-line	Carrier ID	
		Bill of Lading	



- The **Associated Document** section allows you to get information about each of the documents.

Associated Document

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Actions	SetID	Business Unit	Document Type	DOC ID	Status	Document Date	Supplier ID	Location
▼ Actions		G0210	Strategic Sourcing Event	2000006741	Awarded	04/14/2017		
▼ Actions	SHARE		Contract	000000000000000000000000125534	Approved	05/26/2017	0000902053	
▼ Actions		G1001	Purchase Order	3000004157	Dispatched	06/01/2017	0000902053	001
▼ Actions		G1001	Voucher	00024034	Posted	05/09/2018	0000902053	001

Return to Search

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2. Review the document statuses.

- If you select the **Actions** link, SWIFT opens up a new window with the **Contact** search page. Enter the *Supplier ID* or a different field and select **Search**.

Contact

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

SetID =

Supplier ID begins with

Short Supplier Name begins with

Our Customer Number begins with

Supplier Name begins with

Case Sensitive

[Basic Search](#)

- If you select the *DOC ID*, SWIFT opens up a new window to an inquiry page with a high-level summary of that document.

Voucher Inquiry Results

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Actions	Business Unit	Voucher ID	Invoice Number	Invoice Date	Supplier ID	Entry Status	Incomplete	Match Status	Short Supplier Name
▼ Actions	G1001	00024034	20827	05/09/2018	0000902053	Postable	<input type="checkbox"/>	Matched	CATALYST-008

- If you select the **Document Status Inquiry** icon, SWIFT opens up another window that displays all documents attached to the original record. For example, if you select the **Document Status Inquiry** icon for the event, SWIFT brings you to a page that shows all documents attached to the original event.

Associated Document

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Actions	SetID	Business Unit	Document Type	Document ID	Status	Document Date	Supplier ID	Location
Actions	SHARE		Contract	000000000000000000000000125534	Approved	05/25/2017	0000902053	<input type="button" value="More"/>
Actions	SHARE		Payment	0004277503	Posted	11/15/2017	0000903632	001 <input type="button" value="More"/>

You have successfully used the Receipt Document Status inquiry.