

## QUICK REFERENCE GUIDE

Updated November 1, 2019

### Edit 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. Once you create a receipt, you may need to edit it or cancel it for a variety of reasons.

**IMPORTANT:**

- You can edit or cancel a receipt only if it is not in these statuses: Moved or Matched.
- You cannot reverse a receipt that your agency canceled.

**Receipt Header Status Values**

Status Values	Status Definition
<b>Open</b>	One or more receipt lines are in Open status.
<b>Received</b>	All edits have passed. All lines are in Received or Canceled status.
<b>Moved</b>	Receipt has been processed by SWIFT.
<b>Canceled</b>	All lines are canceled. Canceling cannot be reversed.

This guide provides the steps to edit an existing purchase order receipt.

Steps to complete:

- Step 1: Navigate to the Receiving page
- Step 2: Step 2: Edit and save the receipt on the Maintain Receipts page

### Step 1: Navigate to the Receiving page

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

Navigation Options	Navigation Path
<b>Navigation Collection</b>	Procurement, Purchasing, Receipts. The Receiving page defaults.

1. On the **Receiving** page, click the **Find and Existing Value** tab. SWIFT updates the **Receiving** page with search criteria.
  - Enter information (e.g., *Business Unit* and *Receipt Number*) and select **Search**.
  - On the **Search Results** section, select the *Receipt Number*.

**Receiving**

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

**Find an Existing Value** Keyword Search Add a New Value

▼ Search Criteria

Business Unit = G1001

Receipt Number contains 13543

Origin begins with

Bill of Lading begins with

PO Business Unit begins with

Item ID begins with

PO Number begins with

Ship To Location begins with

Shipment Number begins with

Supplier ID begins with

Received Date =

Receipt Status =

User ID begins with

Case Sensitive

**Search** Clear Basic Search Save Search Criteria

Search Results

View All

Business Unit	Receipt Number	Origin	Bill of Lading	PO Business Unit	Item ID	PO Number	PO Receipt	Receive Source	Ship To Location	Shipment Number	Supplier ID	Supplier Name 1	Received Date	Receipt Status	User ID
G1001	0000013543	(blank)	(blank)	G1001	(blank)	3000004460	Y	On-line	8041116	(blank)	0000192548	BITUMINOUS ROADWAYS INC	05/02/2018	Received	FIPOT01

## Step 2: Edit and save the receipt on the Maintain Receipts page

- SWIFT displays the **Maintain Receipts** page.

**Maintain Receipts**

**Receiving**

Business Unit G1001

Receipt ID 0000013543

Header Comments/Attachments

Header Details

Document Status

Receipt Status Fully Received

Activities

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- Edit the receipt. In the example below, *Receipt Quantity* was changed from “2” to “1”.
- Press **Save** when you are done.

**Receipt Lines**

Receipt Lines More Details Links and Status Item / Mfg Data Optional Input Source Information

Line	Item	Description	Receipt Qty	*Recv UOM	Receipt Price	Accept Qty	Status	Category	Close Short	Serial	Device Track	Stock UOM	Device Track
1	ee		1.0000	EA	10.0000	2.0000	Received	10121700				EA	Device Track

Interface Receipt  Run Close Short

Interface Asset Information

**Save** Return to Search Notify Refresh Add

You have successfully edited a purchase order receipt.