Receipts Quick Start Guide

September 1, 2019

Starting in December 2019, there will be changes to SWIFT. While the new version will have a new look and feel, this upgrade will not affect how most processes are completed in SWIFT.

**Note:** There may be some changes to this information since SWIFT Limited Upgrade testing is still in progress. **Questions?** Contact us at: SWIFT.project@state.mn.us.

This guide introduces you to the Receipts module pages after the SWIFT/Portal Limited Upgrade. Options that you see in the module depend on your security roles.

The upgraded version of SWIFT organizes the options based on the navigation collection, which is the links to commonly used features for the module. You'll find them on the left menu.

- Step 1: Navigate to the Receipts module
- Step 2: View the Receipts page to see how it is organized

**Step 1: Navigate to the Receipts module**

1. From **My Homepage**, select the **Procurement** tile.

![Image of My Homepage](image-url)
2. On the Procurement page, select the Purchasing tile

3. On the Purchasing page, select the Receipts tile.

Step 2: View the Receipts page to see how it is organized

1. Review the Receipts page.
   - **Navigation collections** are on the left menu of the page. You can hide this menu as needed.
   - The center of the page is the **work area**. This is where you will create and manage purchase orders.
   - The **Need Help** button allows you to find Quick References guides for this module. It also brings you to the Query Viewer for running reports.
   - Use the back button on the left of the top menu to return to previous pages.
   - Use the **Home** button on the top menu to return to your **My Homepage**.

2. Review a description of the Navigation Collection.

<table>
<thead>
<tr>
<th>Navigation Collection</th>
<th>Description of Folders and Pages</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Add/Update Receipts</strong></td>
<td>Use this page to create and process new receipts (Add a New Value tab) and to update and process existing receipts (Find an Existing Value tab).</td>
</tr>
<tr>
<td>Navigation Collection</td>
<td>Description of Folders and Pages</td>
</tr>
<tr>
<td>----------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Maintain Delivery</td>
<td>Use this page to see the receipt status. You can also enter the delivery date and name of the person to whom the delivery was made.</td>
</tr>
<tr>
<td>Information</td>
<td></td>
</tr>
<tr>
<td>Process Receipts</td>
<td>SWIFT does not currently use this feature.</td>
</tr>
</tbody>
</table>
| Receipt Inquiry            | **Receipt Inquiry:**  
  Agency staff with the Receipt Inquiry role in SWIFT can look up an individual receipt using this inquiry.                                                                                                             |
|                            | **Partially Receipt POs:**  
  Buyers and agency staff can use this inquiry to see the purchase orders that are in a “Partially Received” Status by Buyer. SWIFT lists the quantity and amount to be received and the actual quantity and amounts that were received.  |
|                            | **Document Status:**  
  Use the Document Status inquiry to find out all of the documents associated with a receipt. These transactions include purchase orders, requisitions, vouchers, contracts, payments and events attached to a purchase order. It also provides information about the accounting entries associated with it. |

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