

QUICK REFERENCE GUIDE

February 20, 2024

Cancel Purchase Order Receipts or Receipt Lines

Agencies create a receipt in the Purchasing module by selecting a purchase order and pulling its information into a receipt. Once a receipt is created, you may need to update it or cancel it for a variety of reasons.

- You can update or cancel a receipt only if it is **not** in these statuses: Moved, Matched, or Closed.
- You cannot cancel a receipt if there is an active voucher against it.
- You can cancel individual lines if there is more than one line on a purchase order receipt.
- **IMPORTANT.** Once you cancel a receipt, you cannot reverse this process in SWIFT.

This guide lists the steps to cancel a receipt and a receipt line in SWIFT’s Receipt module.

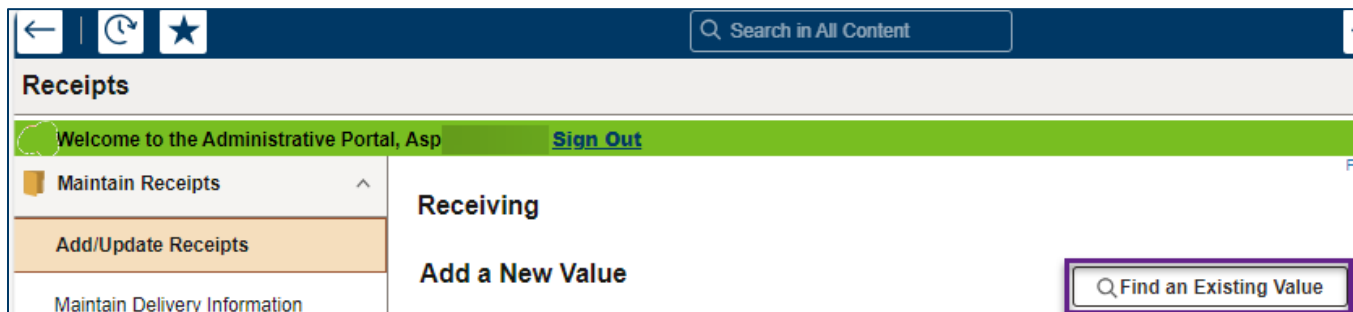
Steps to Cancel a Receipt

Step 1: Access the Receiving page

1. Navigate to the Receiving page.

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

2. On the Receiving page, select the **Find an Existing Value** button.



3. In the Find an Existing Value page, enter the information such as the Business Unit and Receipt Number and select at the bottom of the page. You must specify the Business Unit. The primary Business Unit will default. It can be changed.

Receiving
Find an Existing Value
 Search Criteria

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

Recent Choose from recent searches Saved Choose from saved searches

Searches Searches

*Business Unit = G1001
 Receipt Number begins with 0000025314

- SWIFT displays the Search Results section. It contains receipts that match your search criteria. Select the desired Receipt ID.

Search Results

1 rows - Business Unit "G1001" Receipt Number "0000025314"

Business Unit	Receipt Number	Origin	Bill of Lading	PO Business Unit	Item ID	PO Number	PO Receipt	Receive Source	Ship To Location
G1001	0000025314	(blank)	(blank)	G1001	(blank)	3000008052	Y	On-line	G104THFL00

Step 2: Cancel the purchase order receipt

- SWIFT opens up the Maintain Receipts page. Confirm that this is the correct receipt to cancel.
- To cancel a receipt, press the **Cancel Receipt** icon, which is a red "X" at the top right of the page.


Maintain Receipts

Receiving

Business Unit G1001 Receipt Status Fully Received

Receipt ID 0000025314 Header Comments/Attachments Activities

Header Details Document Status



- SWIFT displays a message. Once you cancel a receipt, it cannot be revised. Select **Yes** if you wish to continue.

Canceling Receipt cannot be reversed. Do you wish to continue? (10300,33)

- SWIFT will update the Receipt Status field on the header and on its lines to "Canceled." This receipt is canceled.

Maintain Receipts

Receiving

Business Unit G1001 Receipt Status Canceled

Receipt ID 0000025314 Header Comments/Attachments Activities

5. Press **Save** at the bottom of the page.

You have successfully canceled a receipt.

Steps to Cancel a Receipt Line

Step 1: Navigate to the Receiving page

Follow the instructions provided for canceling an entire receipt.

Step 2: Cancel the purchase order Receipt line

1. You can cancel individual lines if there is more than one line on a purchase order receipt. Press the **Cancel** icon, which is a red X, in the line.

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		Ergotron WorkIt S-Dual Sit &	2.0000	EA	570.00000	2.0000	Received	56111500	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EA	Device Track	✖
2		Workstation Installation	2.0000	EA	300.00000	2.0000	Received	72101501	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EA	Device Track	✖

Interface Receipt Interface Asset Information

Save Return to Search Notify Refresh Add Update

2. SWIFT displays a message. Canceling the item cannot be reversed. Select **Yes** if you wish to continue.

Canceling Item cannot be reversed. Do you wish to continue? (10300,46)

3. SWIFT updates the receipt page to show that the line was canceled. Press Save at the bottom of the page.

You have successfully cancel a receipt line.