

### **QUICK REFERENCE GUIDE**

February 20, 2024

# **Create a Purchase Order Receipt**

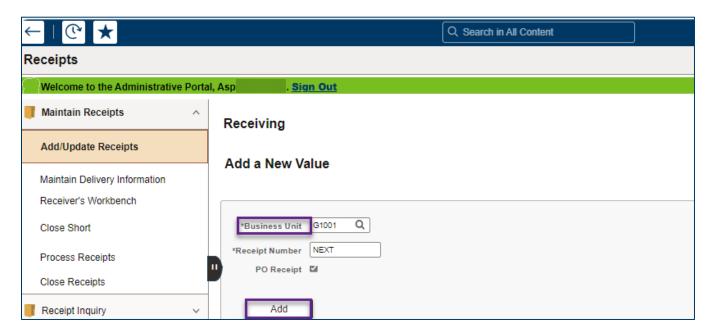
In SWIFT, a receipt tracks the quantity or amount received against a purchase order. Receiving includes determining if the purchase is an asset. This guide provides the steps to create a purchase order receipt.

#### **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. SWIFT displays the Receiving page with the Add a New Value sections. Enter the **Business Unit** and select the **Add** button.



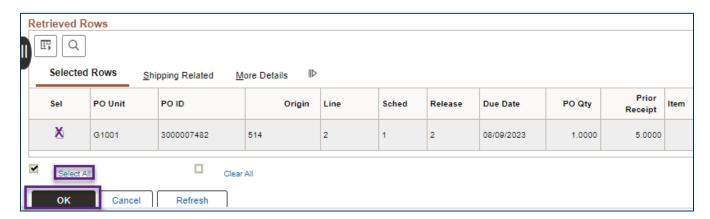
# Step 2: Use the Select Purchase Order page to locate the purchase order to receive

1. SWIFT opens up the Select Purchase Order page. Enter search items such the PO ID and select Search.





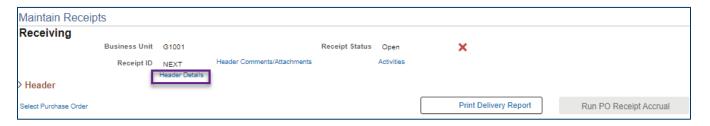
- 2. SWIFT opens up the Retrieved Rows area at the bottom of the Select Purchase Order page.
  - a. Check the **Sel** button for the purchase order row you wish to receive.
  - b. If there are many rows, you can check the box near to the **Select All** link.
  - c. Then, press the **OK** button.



## Step 3: Review or update the details of the receipt

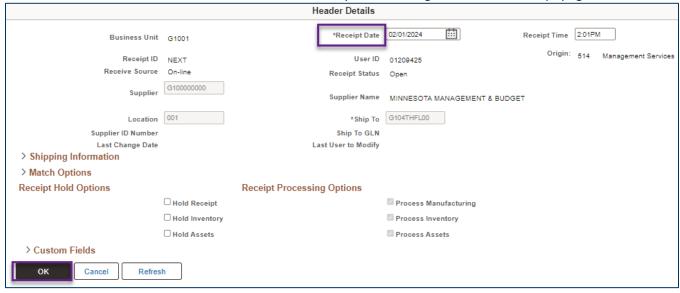
SWIFT creates a Maintain Receipt page for the receipt. There are two places to review or update the details of a receipt on the Maintain Receipt page: Header Details and Receipt Lines.

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.





a. 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.



**IMPORTANT!** SWIFT will not allow you to back date the Receipt Date more than 90 days.

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



### **Step 4: Save the Receipt**

- 1. After you enter or review all of the necessary fields, save the receipt. Select the **Save** button at the bottom of the page.
- 2. 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.

