Receipt Pull Back

To 'Pull Back' a receipt is to call it back from the user to whom it was marked by the user, before it reaches in their hands. This may be required in case-scenarios where user forwards the receipt to an unintended person mistakenly, or the person is un-available so the subject matter (receipt) may be pulled back and re-assigned to someone else. This can only be done until the recipient has received or opened the receipt. This section describes the steps to pull back a receipt.

Important Points:

✓ Only unread (eReceipt) or un-received (pReceipt) receipts can be pulled back.

✓ **'Pull Back'** movement is recorded in the movement details of the receipts.

STEPS TO FOLLOW:

1. Go to **'Sent'** box.

2. Click **'Pull Back'** Icon 📠 under **'Actions'** column corresponding to the receipt number to be pulled back.
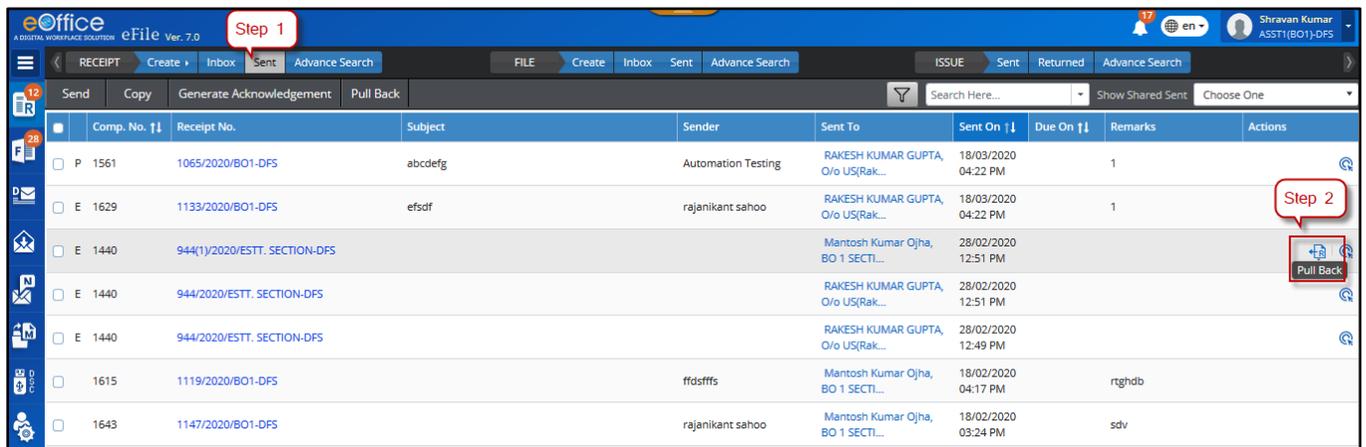

Figure 131

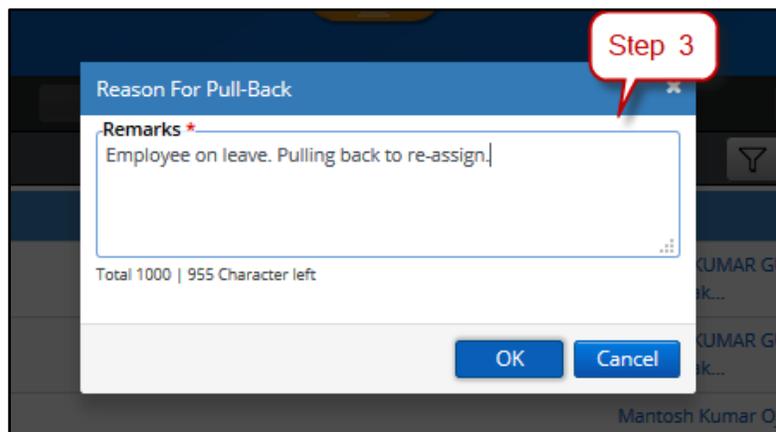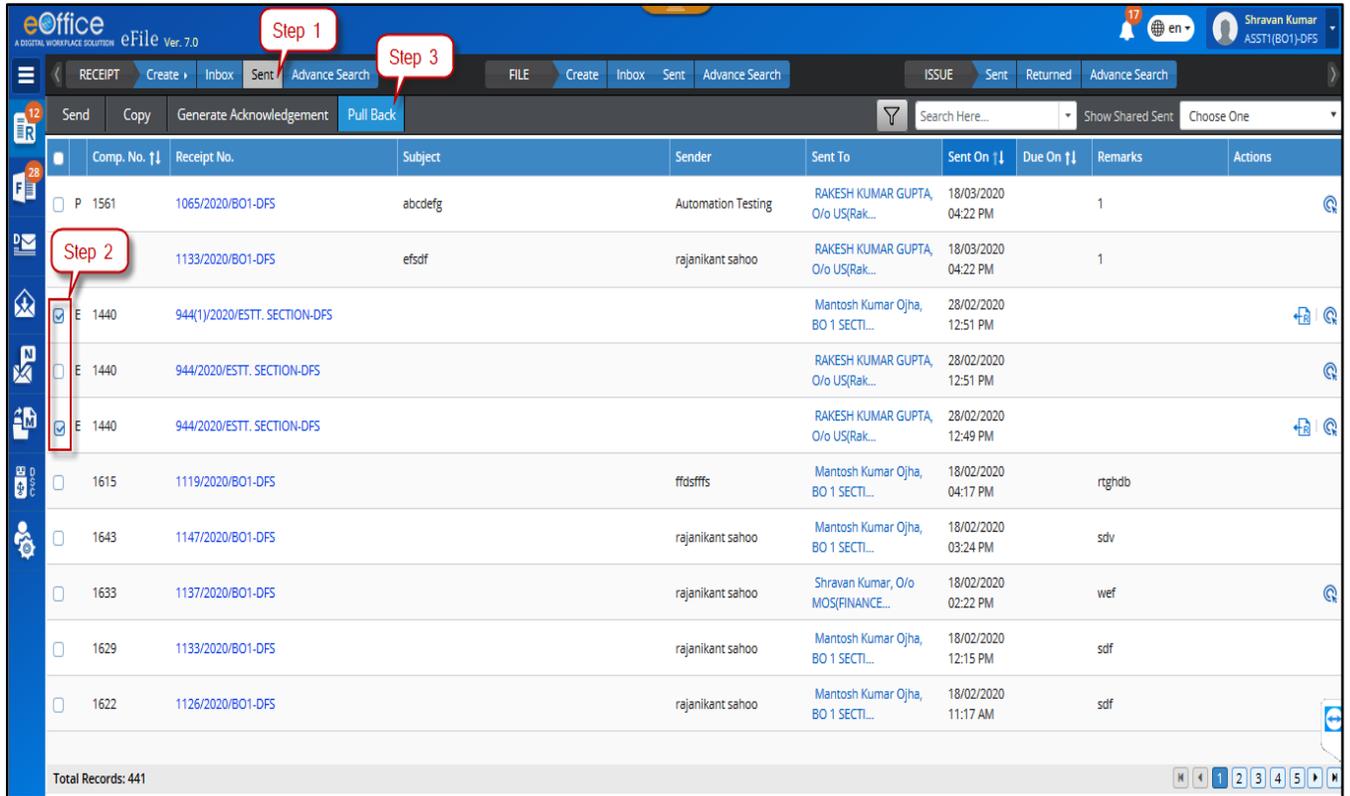3. Enter the mandatory **'Pull Back' Remarks** and Click **'OK'** in the confirmation pop-up box.

Figure 132

1. Go to **'Sent'** box.

2. Select multiple receipts (eligible) to **Pull Back**.

3. Click **Pull Back** menu in the menu bar.
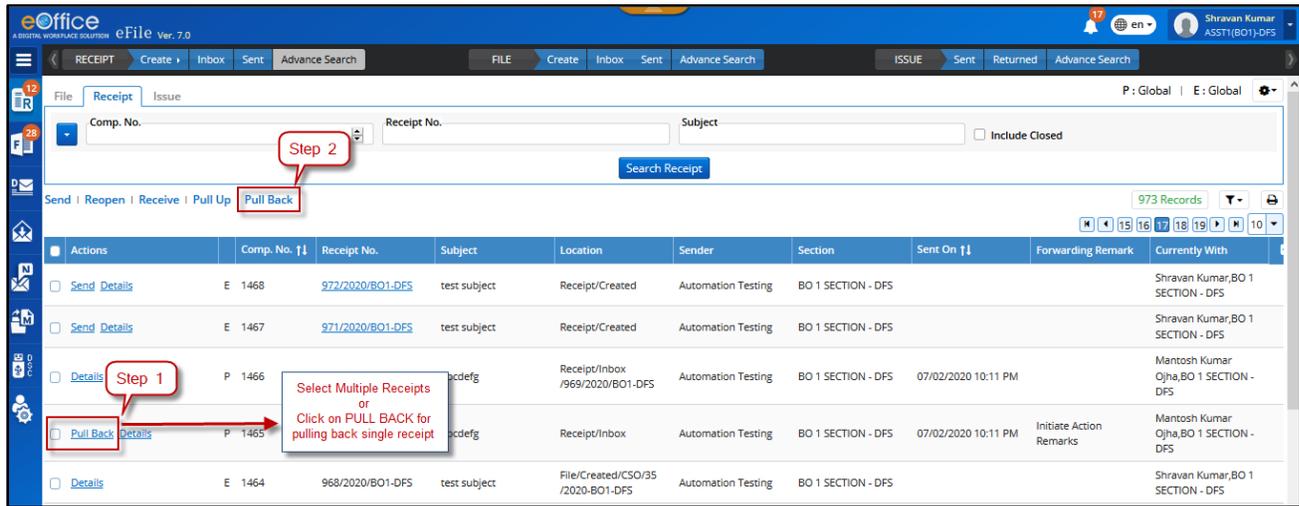

Figure 133

4. Enter the mandatory***'Pull Back'** remarks and Click **'OK'** in the confirmation pop-up box.
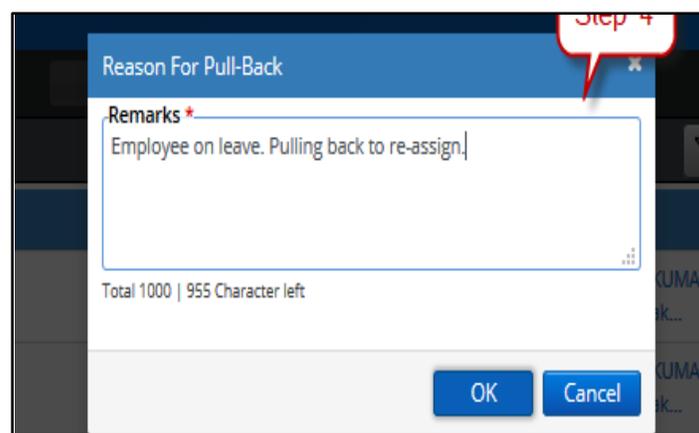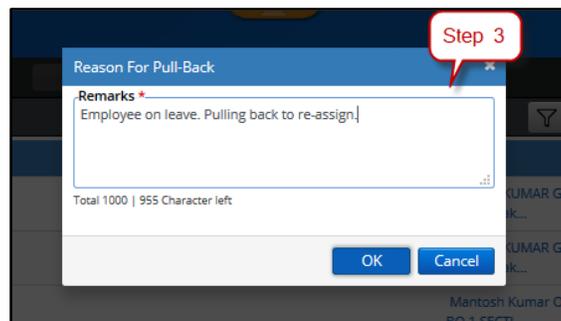

Figure 134

STEPS TO PULL BACK RECEIPTS FROM ADVANCE SEARCH

1. Select the receipt(s) to pull back from the result of the Advance Search.

2. Click **'Pull back'** action button at the top.

Figure 135

3. Enter the mandatory 'Pull Back' remarks and Click '**OK**' in the confirmation pop-up box.

Figure 136

Note:

- The pulled back receipts will be moved to the respective folders from which it was sent(Inbox/Inbox Folder/Created).

Receipt Pull up

This section describes the steps to pull up a receipt from Inbox/Inbox folders/Created list of users who are in same section/office, individual's hierarchy or as per the action scope defined in the system by the administrator. This may be required in case-scenarios, for example, where a person is un-available to process the subject matter (receipt) so it may be pulled up and re-assigned to someone else. Or, also in cases where it is immediately required. Pull up is irrespective of the fact whether the user forwarded the receipt or not.

Important Points:

✓ Receipts attached with other Files/Receipts cannot be pulled up.

✓ Closed receipts cannot be pulled up unless re-opened by the custodian.

STEPS TO FOLLOW:

1. Under Receipt View of the **Inbox/Inbox sub-folder/Created** list, choose **Section** or **Hierarchy** scope.

<div align="center">Or</div>

Choose the user name under **Section** or **Hierarchy** scope, whose receipt you wish to pull-up.

Note:

▪ **Section** view gives collective list of all receipts available in the respective folder opened (Inbox/Inbox sub-folder/Created) of all users in one's section/office.

▪ **Hierarchy** view gives collective list of all receipts available in the respective folder opened (Inbox/Inbox sub-folder/Created) of all users in one's section/office.

2. Select receipts to be pulled up. (Multiple receipts can be pulled up by multiple selection)

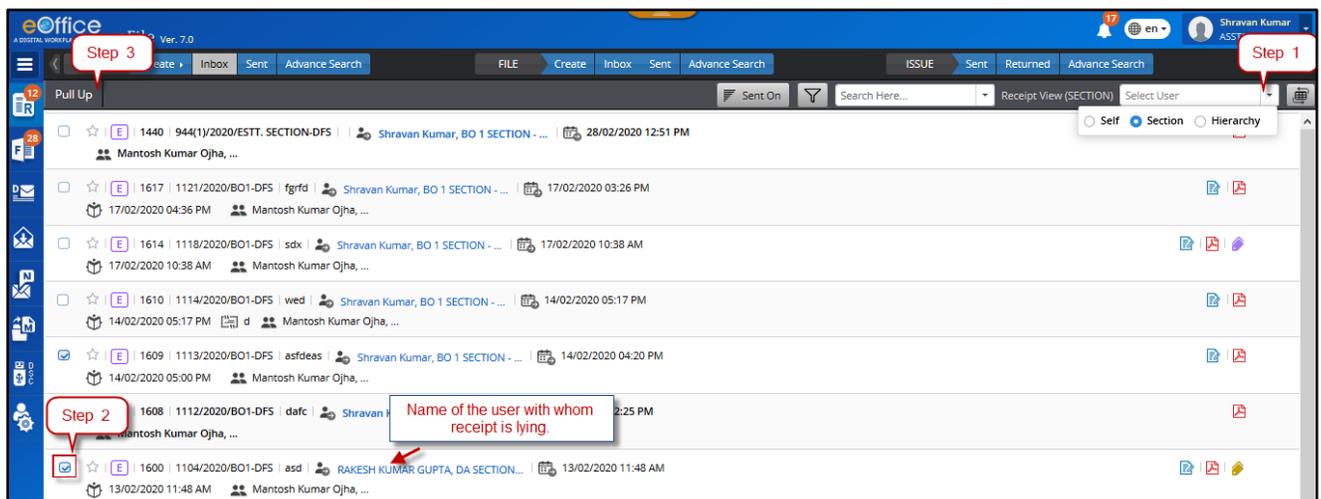3. Click the **'Pull up'** action button in the menu bar.

<div align="center">*Figure 137*</div>

4. Enter the reason in mandatory* remarks **Pull up** in the pop-up box and Click '**OK**'

Receipt(s) should now be available in **Inbox**.

Figure 138

STEPS TO PULL UP RECEIPTS FROM ADVANCE SEARCH

1. Select the receipts to pull up from the result of the Advance Search.

2. Click '**Pull up**' action button at the top.

Figure 139

3. Enter the mandatory '**Pull up**' remarks and Click '**OK**' in the confirmation pop-up box.

Figure140

Note:

▪ The Pull up movement will be added in movement history of Receipt with pull up remark.