

# 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.

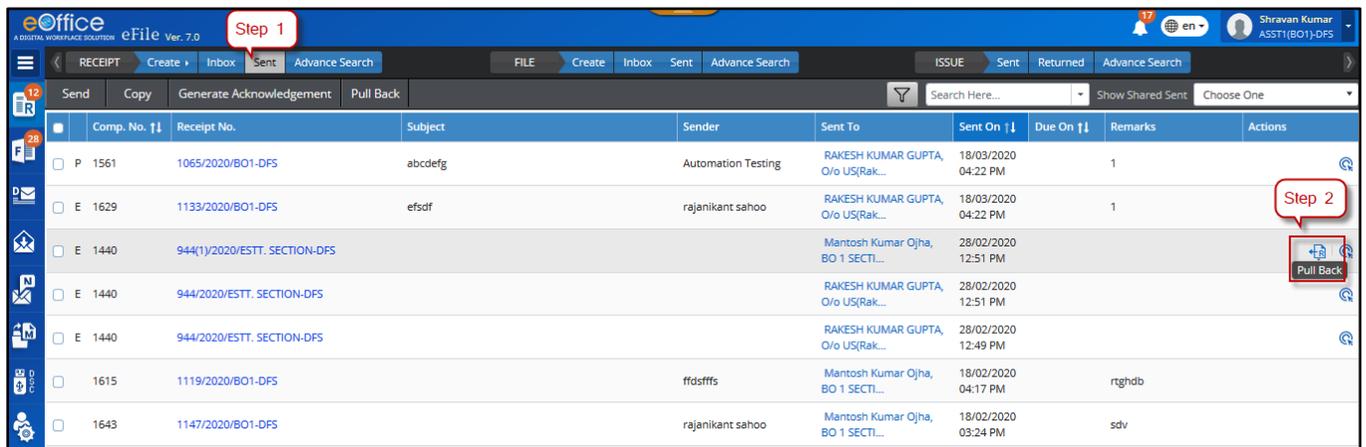


Figure 131

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

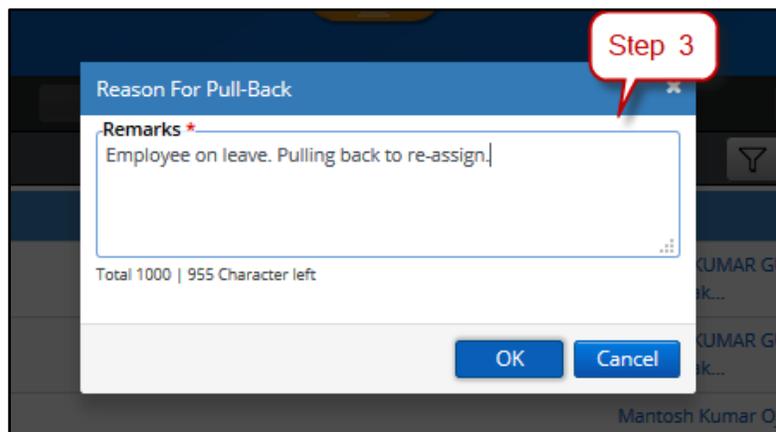
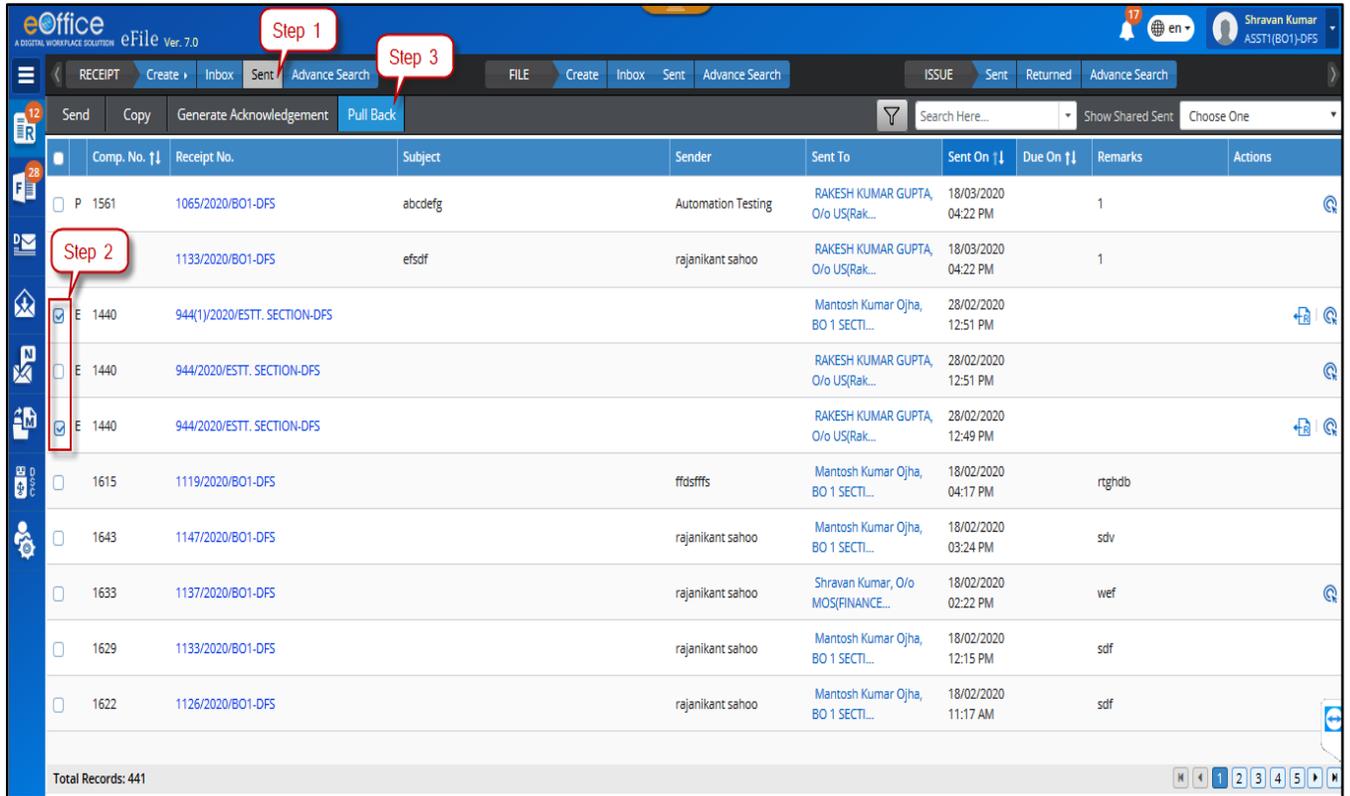


Figure 132

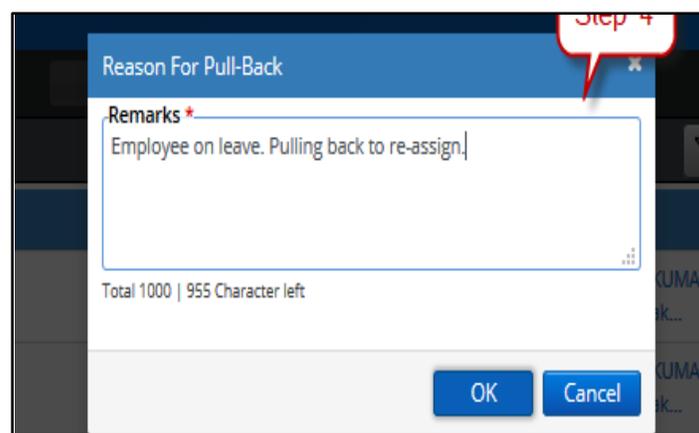
## STEPS TO PULL BACK MULTIPLE RECEIPTS

1. Go to 'Sent' box.
2. Select multiple receipts (eligible) to **Pull Back**.
3. Click **Pull Back** menu in the menu bar.



*Figure 133*

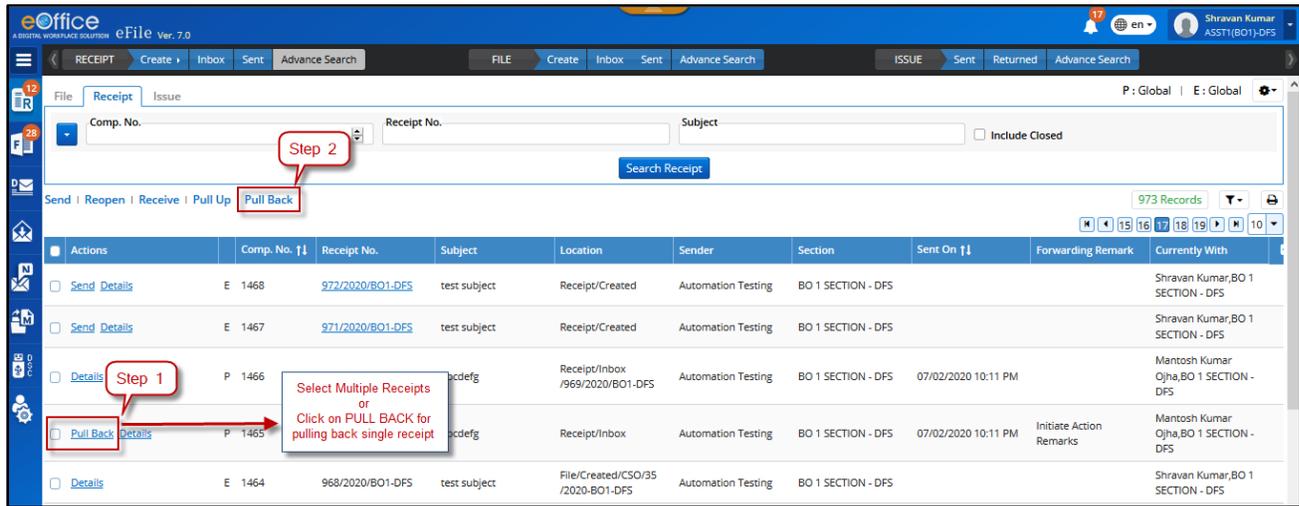
4. Enter the mandatory\***'Pull Back'** remarks and Click **'OK'** in the confirmation pop-up box.



*Figure 134*

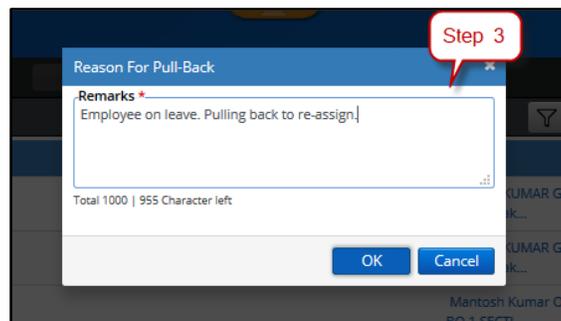
## STEPS TO PULL BACK RECEIPTS FROM ADVANCE SEARCH

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.

Or

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.

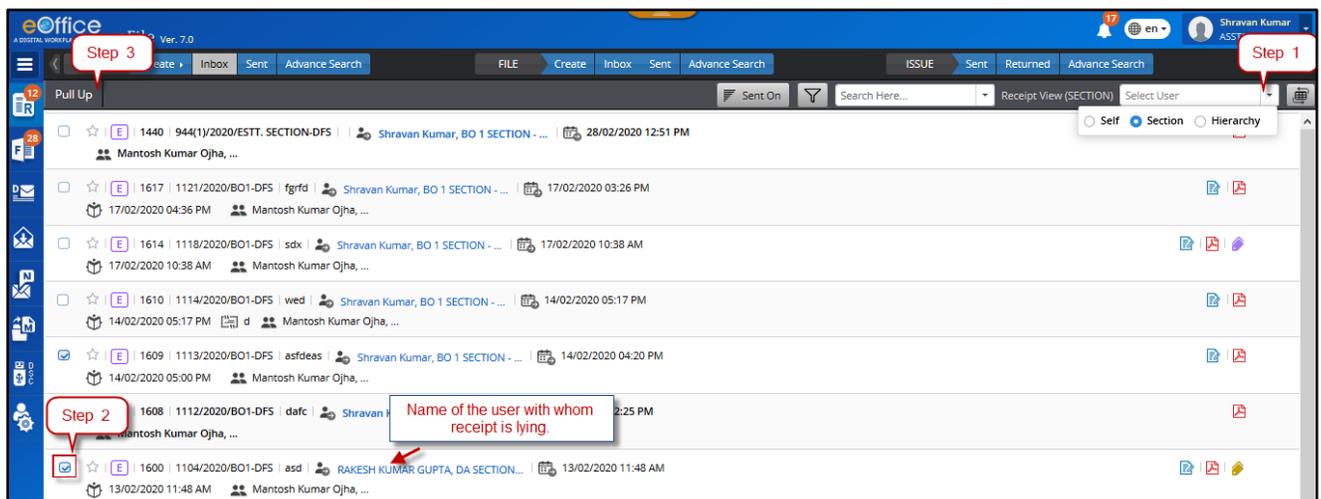


Figure 137

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.

Actions	Comp. No.	Receipt No.	Subject	Location	Sender	Section	Sent On	Forwarding Remark	Currently With
<input type="checkbox"/> Send Details	E 1468	972/2020/BO1-DFS	test subject	Receipt/Created	Automation Testing	BO 1 SECTION - DFS			Shravan Kumar,BO 1 SECTION - DFS
<input type="checkbox"/> Send Details	E 1467	971/2020/BO1-DFS	test subject	Receipt/Created	Automation Testing	BO 1 SECTION - DFS			Shravan Kumar,BO 1 SECTION - DFS
<input type="checkbox"/> Details	P 1466	970/2020/BO1-DFS	abcdefg	Receipt/Inbox /969/2020/BO1-DFS	Automation Testing	BO 1 SECTION - DFS	07/02/2020 10:11 PM		Mantosh Kumar Ojha,BO 1 SECTION - DFS
<input type="checkbox"/> Pull Back Details	P 1465	969/2020/BO1-DFS	abcdefg	Receipt/Inbox	Automation Testing	BO 1 SECTION - DFS	07/02/2020 10:11 PM	Initiate Action Remarks	Mantosh Kumar Ojha,BO 1 SECTION - DFS
<input type="checkbox"/> Details	E 1464	968/2020/BO1-DFS	test subject	File/Created/CSO/35 /2020-BO1-DFS	Automation Testing	BO 1 SECTION - DFS			Shravan Kumar,BO 1 SECTION - DFS
<input type="checkbox"/> Pull Up	E 1455		test subject	File/Parkeed/20012 /677/2020-BO1-DFS	Automation Testing	BO 1 SECTION - DFS			Mantosh Kumar Ojha,BO 1 SECTION - DFS
<input type="checkbox"/> Pull Up	E 1454		test subject	Receipt/Created	Automation Testing	BO 1 SECTION - DFS			Mantosh Kumar Ojha,BO 1 SECTION - DFS

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.