

# Acquisitions Management

Thanks to BiblioMaker's acquisitions module, you can manage document orders from your suppliers without exceeding your purchase credit.

This document describes the management of your procurement budgets, your suppliers and the entry and follow-up of your orders.

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## 1. Budget Management

When the acquisitions module is activated, a Budgets file is accessible via the **Data** menu. This file contains a list of acquisition budgets for titles.

You are free to organize your budgets as you wish, either with one general budget, or with several budgets each representing an area (e.g. Fiction / Documentaries / Youth / Adult, etc. or by school branch).

### 1.1 Entering a Budget Record

To create a new budget record, call the **Action>New** command from the main window of the Budgets file or click on the homonymous button.

A Budget record is made up of different fields, such as the identification code, the name, the price limit per title (generating an alert if an order is placed with a higher amount), an allocated amount and free fields. The SPENT AMOUNT and AVAILABLE fields are automatically calculated by the software as the acquisition is spent.

Add Budget - Nr 1	
Code	ARCHI
Name	Architecture
Limit/title	200.00
Allocated amount	1'300.00
Spent amount	0.00
Available	0.00
Free Text	
Free Number	0
Free Date	

Icons: Up, Down, Delete, Info

Buttons: Cancel, Validate

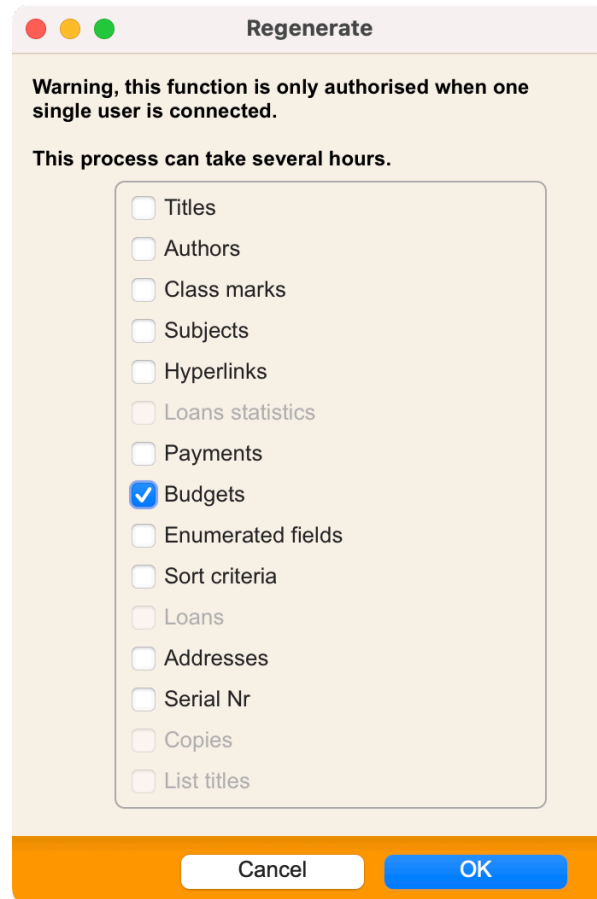
### 1.2 Displaying the Budgets File

The main window of the Budget file displays the allocated, spent and available amounts. It can be seen as a dashboard of committed expenses and available balance. The purpose of the file is to help you define your procurement policy (via the allocated amounts) and to avoid exceeding the expenditure budgets.

### 1.3 Reset Budgets

Usually, a budget is established for a specific period of time, such as a calendar year. Therefore, it may be necessary to reset the ALLOCATED AMOUNT and AVAILABLE fields at the end of the budgets' validity period.

The regeneration of budgets does just that. It is accessible in Maintenance (accessible via the menu **File>Maintenance**) by calling the command **Other>Regeneration** and checking the box **Budgets**.



Another strategy is to create new budgets each year and to indicate in both the code and the designation the year in which the budget is valid (e.g. code *FIC23* for *Fiction 2023*). In this way, it is possible to keep the budgets from previous years.

## 2. Supplier management

You register the suppliers of the documents (bookshops or other institutions) in the Addresses file, accessible via the **Data** menu.

### 2.1 Entry of Suppliers

To register a supplier, call the **Action>New** command from the Addresses file or click on the homonymous button.

In the dialog for choosing the address type, select the *Supplier* or similar type. If no ad hoc type is proposed, you can create it in the Addresses file options, accessible via the **Action>Options** menu.

The input grid for a supplier is identical to that of a reader. Please refer to the reference manual for a description of the different fields.

Tip: we suggest you enter a mnemonic code preceded by the letter *S* for each supplier. This way, when entering an order, the choice of a supplier will be easier: either by simply entering *S* to obtain the list of all suppliers, or *S* followed by the code (e.g. *SSMI* for the *Smith bookstore*) to call a specific supplier.

The screenshot shows a software window titled 'Modification Addresses 1 / 28'. The main header displays 'Burlington and Son' on the left and 'Bookshop' on the right. Below the header, there are two tabs: 'Address' (selected) and 'Additional info'. The form is organized into several sections:

- Code:** A text field containing 'BURL'.
- Title:** A text field.
- Surname:** A text field containing 'Burlington and Son'.
- Reference person:** A text field containing 'Mr. John Regon'.
- Address:** A large text area containing '13th Av.'.
- Post code/Town:** Two text fields containing '34245' and 'New York'.
- Canton:** A text field.
- Country:** A text field containing 'United States'.
- Region:** A text field.
- Language:** A dropdown menu showing 'English'.
- Category:** A dropdown menu.
- Status:** A dropdown menu.
- E-mail:** A text field containing 'info@burlington.com'.
- Correspondence:** Radio buttons for 'E-mail' (selected) and 'Mail'.
- Photo:** A placeholder box for a photo.
- Phone:** Fields for 'Private', 'Professional' (containing '01 837 384 857'), 'Mobile', and 'Telefax'.
- Web page:** A text field.
- Free 1, Free 2, Free 3, Free 4:** Four empty text fields for additional information.

At the bottom of the window, there is an orange bar with icons for back, forward, delete, and help, along with 'Cancel' and 'Validate' buttons.

### 3. Order Management

Items on order are recorded in the Titles file, along with the items in the library's holdings. Thus, a document search will display both documents already acquired and those in the process of being acquired.

The documents on order can be identified by the words "Order" or "Overdue" in the **Order** column of the main Documents window.

#### 3.1. Entering an Order

To order a new document, call the **Action>Order** command or click on the "Shopping Cart" button at the bottom of the main Titles window.

The usual dialog for choosing the type of document is displayed. If you have the function Download records from the web, you can enter the ISBN of the ordered document in order to obtain the bibliographic data, the summary and the cover page of the document.

Entering an ordered document is not very different from entering a document that has already been purchased. For this reason, we will limit ourselves to describing the additional **Order** tab page displayed for the occasion.

The screenshot shows the 'Add Title - Nr 1' dialog box with the 'Order' tab selected. The dialog is divided into several sections for entering order details.

**Title Information:**

- Industry in the Age of Internet / Joanna Gross
- Order (selected)
- Book

**Navigation Tabs:** Bibliographic description, Copies, Local data, Analyse, Addresses and links, **Order**, Cover page, Synthesis

**Order Details:**

- Budget code: ECON
- Name: Economics
- Available: 971.70
- Supplier code: PUTTNAM
- Address: Puttnam and Co.  
M. Nathan Puttnam  
Sesam Street 45  
EV 564 34 E London  
United Kingdom
- Prof. phone: (empty)
- Remarks: (empty text area)

**Order Summary:**

Order date	08.02.2023	Sent reminder(s)	0
Delivery date	27.02.2023	Last reminder sent on	00.00.00
Price	43.00	<input type="checkbox"/> No reminders	
Qty ordered	1		

**Footer:** Cancel, Validate

The **Order** tab displays command-specific topics:

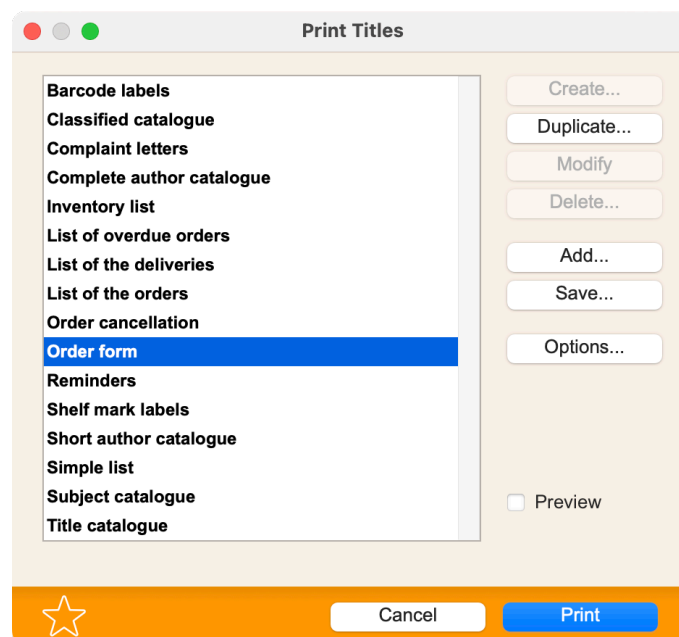
- BUDGET CODE : link to the Budgets file. Click on the field heading to get a list of all budgets or enter the code of the desired budget.
- SUPPLIER CODE : link to the Addresses file. Click on the heading to get a list of all the addresses or enter the code or its beginning to limit the selection to the desired suppliers.
- ORDER DATE : usually the order date.
- DELIVERY DATE : expected delivery date. If the delivery is late, you can send a reminder to the supplier.
- PRICE : price of one copy of the ordered document.
- QTY ORDERED : number of ordered copies.
- NO REMINDERS : if the box is checked, the program will ignore the order when generating reminders to suppliers.

Once you have finished entering the order, validate the form. The software performs a number of checks and displays an alert if necessary:

- another document with the same ISBN has already been entered (duplicate check).
- the price of the document exceeds the per document limit of the linked budget.
- the order price exceeds the amount available in the related budget.
- the selected supplier has other open orders in backlog.

### 3.2. Generating an Order Form

You generate an order form by first selecting the documents to be ordered (if necessary, use the **Action>Find** command and in the **Order** menu the *Order* item), then call up the **File>Print** command and select the **Order form** template



Options for this print format include vector (print or email) and order form text.

Sending by e-mail is possible under several conditions:

- The supplier's email address has been entered in the supplier's record.
- BiblioMaker has been configured to send e-mails.

When generating the order forms, the software groups the orders to the same supplier on the same form. Thus, if you have selected for example 4 orders to 2 different suppliers, only 2 forms will be generated.

### 3.3 Order Tracking

Once the order forms have been generated and sent, it is a matter of following up on the orders in order to claim the orders that have not been fulfilled in time.

In the Titles file, call the **Action>Find** command and from the **Order** menu select the *Overdue Order* item. If you are limiting your tracking to orders from a particular supplier, enter their name in the SUPPLIER NAME field.

A **List of overdue orders** can be printed from the Titles file. You also have the option to send a reminder to suppliers via the **File>Print** command and choosing the **Reminders** format. As with the Order Form, the format options let you choose the sending vector (print or e-mail), whether or not the sending is saved and the text of the reminder.

Note that if a supplier gives you reasons for non-delivery of the order, you can modify the record of an open order and check the box **No reminders** to avoid sending future reminders. Optionally, use a free field to complete the information on the open order.

### 3.4 Receiving an Order

When the supplier delivers the ordered documents, you proceed as follows to receive them:

Select the corresponding open command and call the **Action>Receive** command.

Receive	
Title	Physiology of a peasant economy : a rice village
Budget code	ECON
Name	Economics
Available	971.70
Price	58.30
Quantity received	1

Cancel OK

A dialog is displayed in which you confirm the budget used for the order, the price of the document ordered and the quantity of copies received. Any changes made in this dialog will be reflected in the linked budget. Thus, if you change the budget, the spent and available amounts of the original budget as well as of the new budget chosen will be recalculated. The same goes for the unit price and for the quantity received.

Once the dialog is validated, the usual cataloguing grid is displayed with some of the fields already filled in. It is up to you to complete the grid with the missing information. Once the form is validated, the document is considered as received and is now part of your library's collection.