Order Unit Vendor Records

Aleph offers an option to create local vendor records. These records can be used to set Order Unit-specific defaults for the fields in the order record that default from the vendor record.

Best Practice recommendations from the Acquisitions Advisory Team

Order Unit vendor records affect all orders placed for a specific vendor and it is important that the ramifications of using local vendor records be understood by all staff in the Unit.

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- We recommend that each Order Unit establish clear policies on the use of Order Unit vendor records and communicate these policies to all staff in the Unit.
- We recommend that the creation of Order Unit vendor records be limited to a small number of staff in the Unit to ensure the quality of these records and to ensure that information about these records is distributed to all staff in the Unit.

You may enter local information in the following fields in a vendor record created for your Order Unit:

**Contact:** You may enter up to five contact names. The name you enter as Contact 1 will appear by default in the Contact Name field on order record. You may select one of the other names from a dropdown list (or you may leave Contact Name field blank) on order record. The name in Contact Name field on the order record will be printed on purchase orders and claims.

**Note:** You may enter local information about a vendor in this field. This information does not appear in the order record.

**Account No. (M):** This information will print on purchase orders and claims for Monograph orders. Account numbers do not appear in the order record.

**Account No. (S):** This information will print on purchase orders and claims for Serial and Standing Orders. Account numbers do not appear in the order record.
**Terms Sign/Terms Percent:** This field can be used to record standard discounts or added charges which the vendor applies to your purchases. Encumbrances are reduced (or increased) by the percent you enter in the Terms Percent field.

**Delivery 1-3 (ACQ) / Delivery Delay:** These fields are used together to set the default claim date for Monograph orders. Delivery is the way that you expect the vendor to ship the material to your library (Surface, Airmail, etc.). The Delivery code appears on the order record as Delivery Type. Delivery Delay is the number of days to be added to the order date to calculate the Claim Date on the order record.

**Delivery 4-5 (SER) / Delivery Delay:** These fields are used together to control claim date for Serial orders. Delivery is the way that you expect the vendor to ship the material to your library (Surface, Airmail, etc.). The Delivery code appears on the order record as Delivery Type. Delivery Delay is the number of days to be added to the order date to calculate the claim date. Note that there is no explicit claim date field on a serial order record. The Delivery Delay is used when the Claim Report for Serial Orders is run (orders appear on the report when that number of days have elapsed since order was placed or last claim was sent).

**Order Delivery:** This is the form you’re using for the order. Options are Letter or List. This appears in the order record as Order Delivery Type.

**Letter Format:** This is the style of Letter that is used for the order. We have only one Letter format defined at this point. We may add more later. This appears in the order record as Letter Type.

**List Format:** This is the style of List that is used for the order. We have only one List format defined at this point. We may add more later. This field does not appear in the order record.

**Letter Send:** This is the way that a Letter order will be sent to the vendor. Options are PRINT and EMAIL (we hope to add EDI soon). This appears in the order record as Send Letter By.

**List Send:** This is the way that a List order will be sent to the vendor. Options are PRINT and EMAIL.

See training documents for information on creating Order Unit vendor records.

Also see document called Vendor records for additional information about Aleph vendor records.