Vendor Records

- you must have a vendor code to create an order record
- requests for new vendor codes and changes to existing vendor records can be found at ...
- there are some special vendor codes you can use if no vendor record exists and you place the order outside of Aleph (note that you will need a real vendor code to process an invoice through Aleph for these orders)
  - XEMAIL
  - XFAX
  - XPCARD
  - XPHONE
  - XWEB
- there is also a vendor code to use for miscellaneous gifts (we recommend that you have a vendor record made for frequent donors)
  - XGIFT
- there is a vendor code to use in cases where the original vendor code has been made Inactive but you need to modify the order record (e.g. to mark it cancelled)
  - XNOTACTIVE
- there are two levels in an Aleph vendor record
  - master vendor record (required; maintained centrally by HCL Financial Office)
  - Order Unit vendor record (optional; maintained by Order Unit)
- all addresses (including email addresses) are maintained at the master record level
- some values in the order record default from the vendor record
- you can set up an Order Unit vendor record to set your own defaults (see separate document [Order Unit Vendor Records](http://hul.harvard.edu/ois/systems/aleph/docs/vendor_records.pdf) for additional information)
- defaults will come from the Order Unit vendor record if you have made one; otherwise they come from the master vendor record
- you can change these default values in an individual order record
- the following fields default from the vendor record ...
  - Order delivery type (format of order sent to vendor)
- default from master vendor record is **Letter**
- choices are **Letter** or **List**
  - Letter type (style of order slip)
    - default from master vendor record is **01**
    - this is relevant for **Letter** order type only
    - 01 is the only choice for **Letter** right now
  - Send letter by (way in which order will be delivered to vendor)
    - default from master vendor record is **Print**
    - choices are **Print** or **Email**
      - **Email** requires email address in the master vendor record
      - see separate documents **Email letter orders** and **Email list orders** for more information on requirements for email orders
      - we expect **EDI** transfer of orders to be available at some time in the future
  - Delivery type (the way you want vendor to deliver the material)
    - your choice here controls automatic claim date for **Monograph** and **Serial** orders
      (first piece only for **Serial** order—claim dates for ongoing check-in are set in the Subscription Information Form)
    - claim date for **Standing Order** is based on the value you enter in the **Max. Arrival Days** field
    - default from master vendor record is **Surface**
    - choices and default claim intervals from master vendor record are ...
      - for Monograph orders (ACQ)
        - Surface (90 days)
        - Airmail (30 days)
        - Courier (10 days)
      - for Serial orders (SER)
        - Surface (90 days)
        - Airmail (15 days)
      - set the claim date manually in the order record if you don't want the default claim date
- you can search the Vendor List by keyword; the following fields are included in the keyword index:
  - Additional code (these are codes that link the Aleph vendor record to the vendor record maintained by Harvard's Accounts Payable Department)
  - Vendor name
  - Contact
  - Country
Vendor Records

- Material type (this field is optional and will not be used at the master vendor record level)
- Vendor addresses

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