Supplier reference data

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Discover how to create a supplier record in OLIB.

Overview

► Acquisitions > Publishers/Suppliers
► Cataloguing > Publishers/Suppliers

Supplier records are required when creating an order. As a minimum they require some basic details including address and currency.

Basic details

Complete the following as a minimum prior to sending orders to a Supplier:

1. Use New Record in Context in the Publishers/Suppliers domain.
2. OLIB generates a Key ID in hexadecimal format. This may be overwritten with a local Key ID if required.
3. Enter the Name of the Supplier.
4. For this Supplier record you should select the Type Supplier.
5. (Optional) Cross-reference to another Supplier. See Supplier cross-referencing below.
6. Click the Supplier Details tab. When you click on Address this opens the Address page to enter details. For orders the Address Type should be set to O = Order. You can enter more than one address so that there can be different addresses used by different locations. See Supplier/Location-level defaults below.
7. (Optional) Enter the supplier web site URL as an Attachment. See Link to the Supplier’s website below.
8. Enter other details as required such as Supplier Account No. and contact details.

Acquisitions parameters and Supplier/Location-level defaults

This is a list of default values that appear automatically when you create orders/order items. You can set them at:

- 'Supplier-level' so that the same defaults apply whenever this Supplier is used. Simply enter the defaults in the Acquisitions Parameters section.
- 'Supplier/location-level' so that you can specify the defaults between this supplier and specific locations. In modify, scroll to the foot of the page and in Location-Level Defaults select the Location from the drop down. Select the rest of the default values as required.
<table>
<thead>
<tr>
<th>FIELD</th>
<th>SCREEN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Media Type</td>
<td>Location-Level Defaults</td>
<td>A default Media Type for orders for this Location to this Supplier. This default takes precedence over any other defaults. Noteworthy is this field needs to be added to the layout first using Layout Manager (suggested position below Location).</td>
</tr>
<tr>
<td>Currency</td>
<td>Acquisitions Parameters</td>
<td>Default operating currency with this supplier.</td>
</tr>
<tr>
<td></td>
<td>Location-Level Defaults</td>
<td></td>
</tr>
<tr>
<td>Default Discount</td>
<td>Acquisitions Parameters</td>
<td>A percentage Default Discount is available. Note this field needs to be added to the layout first, using Layout manager (suggested position below Account No).</td>
</tr>
<tr>
<td></td>
<td>Location-Level Defaults</td>
<td></td>
</tr>
<tr>
<td>Delivery Method</td>
<td>Acquisitions Parameters</td>
<td>How items are delivered.</td>
</tr>
<tr>
<td></td>
<td>Location-Level Defaults</td>
<td></td>
</tr>
<tr>
<td>Create Copies</td>
<td>Acquisitions Parameters</td>
<td>Whether or not copies are created at check in.</td>
</tr>
<tr>
<td></td>
<td>Location-Level Defaults</td>
<td></td>
</tr>
<tr>
<td>Copy Category</td>
<td>Acquisitions Parameters</td>
<td>Default value set at the time of ordering - subsequently used in Circulation.</td>
</tr>
<tr>
<td>Copy Status</td>
<td>Location-Level Defaults</td>
<td>Default value set at the time of ordering - subsequently used in Circulation.</td>
</tr>
<tr>
<td>Account</td>
<td>Acquisitions Parameters</td>
<td>EDI Party ID Code. The unique code agreed between the library and the supplier. If you have multiple locations you can enter different party ID codes for each Location.</td>
</tr>
<tr>
<td></td>
<td>Location-Level Defaults</td>
<td></td>
</tr>
</tbody>
</table>

In addition you can set up a free text Check In Popup message for each supplier. The message will be displayed to the member of staff at the point of check in.
Addresses

After you have chosen the relevant Location from the drop down, you can also choose a specific supplier address to be used with that Location. Select the Address from the drop down and click >>. OLIB inserts it into the list of Locations and their defaults. The same method is used to update an address - select the Location and the correct Address from the drop downs and click >>. OLIB shows the updated address in the list.

If you want to remove an Address for a Location, select <NULL> from the Address drop down and click >>. The Supplier's default address will then be used.

Default supplier address

At the top of the page where Addresses are entered, you can specify the default supplier address:

1. In modify mode, select the box next to the relevant address.
2. Select Set as default order address from the Actions drop-down list.

Clear default order address will be de-select an address to no longer be the default.

The default address is the one used for orders when a location has none specified.

How does OLIB define the default address?

If there is only one address, this will be used as the default order address when an order letter/email is generated, irrespective of address type, Valid From/To dates, etc.

If there are several addresses and one has been flagged as the default order address (indicated by an asterisk to the left of the address type), this is the default order address.

If there are several addresses, the default address is the address where the Valid From/To dates encompass the date on which the order letter is printed.

If none of the addresses has a Valid From/To date, the default address is the one with an Address Type of O.

If there are no addresses with an address type of O, or if there is more than one address with an address type of O, the one with the lowest 'addrseq' (address sequence) is the default address.

If none of the addresses has a value in the addrseq field, the address with the highest addrno (internal address number - i.e. the address that was added most recently) is the default address.

Email addresses

If Alerting is to be used to send Orders or Claims to the Supplier, enter an Orders and Claims email address - Email Address for Orders, Email Address for Claims.

- Unless you are using EDI with this supplier, you should select No in EDI.
EDI parameters

EDI configuration is required in the Supplier record and in the Programs domain.

Link to the Supplier's website

Whenever you view the Supplier record you can directly access their website by first creating Attachment details in the Supplier record:

1. In the Supplier details page click on Web Site.
2. In the Object Details select a Type of Web Page and enter a Title and Status.
3. Set Locate By to Textual and enter the full URL in Locator (e.g., http://www.askews.co.uk/).

Other details relate to Link Checking. Save the Object details back to the main Supplier record. You can now access this web page from your OLIB Supplier record.

Claim sequences

See About Claims for information about claim sequences.

Performance statistics

Use the Performance page to set up a date range to monitor supplier performance. This can just include a Start date for ongoing monitoring. Data is collected after the start date. It includes counts for orders placed and orders received in (e.g., 1 month, 2 months etc.).

Supplier cross-referencing

Optionally a Supplier record can be cross referenced to another Supplier.

This feature requires:

- The system manager to use Layout manager to add the Suppliers Linked To attribute to the Suppliers layout.
- Create a suitable record in the Link Types domain to create links between Suppliers (e.g., See, See Also).

1. Create a new record in reference Data > Link Types.
2. Select Suppliers from the Domain drop-down list.
3. Complete and save the remaining details.
4. (Optional) Create a reverse Link Type that links to this record.
5. In Suppliers, modify the record to be cross referenced.
6. Click Suppliers Linked To.
7. Search for the Supplier to be linked to and insert it.
8. In Supplier Cross References choose the **above Link Type** from the drop-down list and save the changes.