
3 PURCHASE OF SERIALS

This chapter deals with the procedure of purchasing serials.

Before creating an order, you can prepare individual *order items*. First you define the material and then you enter the order item, which includes data on the supplier, copies, priority and price. The order items collected form the basis for selecting and deciding about ordering individual serials.

An order can be prepared as an annual order, which must be renewed, as a standing order or as a monographic series order. An order may include one or more titles of serials. The prepared order is submitted and sent to the supplier. Data on the ordered material will be added to the holdings data.

If you want to *continue receiving serials in the following period or with the next volume*, create a new order for the serials that are on an annual order and send it to the supplier; thereby new fields 997 will be created. In relation to standing orders, do not create new orders, but only prepare new fields 997.

You can cancel the order of an individual serial from the supplier by preparing a *cancellation note*. The cancellation note prepared is submitted and sent to the supplier.

You *close* an order for an individual serial title when you expect to receive no more issues.

After having sent an order, you can receive, from the supplier, a pro-forma invoice, advance payment invoice, payment quotation or some other document about the amount to be paid. On the basis of this document, you perform prepayment or *advance payment* to the supplier. You enter the data about advance payment and close the document. Then you send it to the accounting department and enter the sending date. When you receive a notification from the accounting department, stating that the advance payment has been performed, enter the payment date. Data about the advance payment is added to the holdings data.

You may receive the *invoice* for serials either after the advance payment has been made or without previous advance payment. Enter the data about the invoice and close the invoice. Then send it to the accounting department and enter the sending date. When you receive a notification from the accounting department, stating that the invoice has been paid, enter the payment date. The invoice data is added to the holdings data.

Subchapters:

- Selecting the serials to be ordered
- Ordering serials
- Next period or volume
- Cancelling an order and sending an order cancellation
- Closing check-in
- Prepaying serials
- Paying for serials
- General procedures