

## 5.1 PREPARING A SAMPLE COPY REQUEST

First enter general data about the request, and then the data about each single request item.

Prepare the request in the **Sample copy request** class.

### *Precondition*

Supplier details must be in the database of suppliers. The role of *Supplier (S)* must be marked.

### *Procedure*

1. Highlight the **Sample copy request** class.
2. Select the **Class / New object** method.  
The **Sample copy request** editor will open.
3. Enter general data about the request (see chapter 5.1.1).
4. Enter request item(s) (see chapter 5.1.2).
5. Save the data.

A number, which cannot be changed, will be assigned to the request. Requests are numbered automatically, in compliance with the setting of the counter for requests (see chapter 11.3).

### *Status after preparing a request*

Sample copy request

- entered

Sample copy request item

- entered

### *What to do next*

Submit the prepared request and send it to the supplier.

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### 5.1.1 Entering general data

Enter general data about the sample copy request in the **Sample copy request** editor.

### *Procedure*

1. Under "Acquisition type", select the appropriate value, *gift* is defined as the default value.
2. Specify the supplier.  
Click the **Supplier** button, which forms a link to the **Partner** class, where also partners with the role of suppliers of serials are listed. The **Search – Partner** editor will open. Find and select the supplier.


By selecting the supplier, the mailing address is also specified. If only the head office address is listed for the supplier, then this is the mailing address.

If a department or contact person is specified for the supplier, the relationship with this department or contact person is created. In such a case the request will be sent to this department or contact person.

You can change the default mailing address (see chapter 3.8.5).



**Tip:**

If you know the supplier symbol, department symbol or contact person symbol, click the icon  to define the supplier.

3. By selecting the supplier and mailing address, the default sending method will be transferred to "Sending method". You can change this value.

The request form and sending method are defined by the selected value.

4. By selecting the supplier, the default language of the request will be transferred to "Language". You can change this value.
5. To enter an internal note, which will not appear on the request, click the **Note** button.

Enter the text into the text entry window and save it.

6. To enter the note that should appear on the request, click the **Request note** button.

Enter the text into the text entry window and save it.

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## 5.1.2 Entering an item

Enter request item data in the **Sample copy request item** editor.

### *Procedure*

1. In the **Sample copy request** editor, click the **New object** button.

The **Search – Bibliographic record** search window will open.

2. Find and select the bibliographic record.

If the record does not exist in the local database, you can download it from the shared database (see chapter 2.1.1).

If the record does not exist in the local database and you do not intend to download it from the shared database, close the search window by clicking the **Close** button. The **Material** editor will open, where you can enter bibliographic data (see chapter 2.2).

3. To enter a request item, click the **New object** button in the **Material** editor. The **Sample copy request item** editor will open.
4. Enter the number of copies.

5. Enter the sample copy price. You can also enter the foreign price. In such a case select the appropriate value from the list of foreign currencies.
6. To enter the note that should appear on the request, under the item, click the **Request note** button.

Enter the text into the text entry window and save it.

7. Save the data.