3   PURCHASE OF MATERIAL

This chapter deals with the procedure of purchasing library material.

Purchase can be based, among other things, on **requests** made by members. To make a request you need the bibliographic data on the material and the data about the supplier, about copies, priority, price and requestor, all of it is recorded under the order item. You record a request by first specifying the material and then by entering an order item for this material. Requests received are then processed, i.e. approved or rejected, or they receive the status of a *desideratum*.

There are different types of **purchase orders**: standard orders, advance orders, on approval orders, blanket orders. Depending on the type of material you can create an order for a monograph, for a multi-volume monograph or for a monographic series item. An order can include one or more monograph titles. A prepared order is submitted and sent to the supplier. Data on the ordered material is added to the holdings data.

You can cancel either part or all of an order item, or part or all of an order from the supplier by preparing an **order cancellation**. The prepared order cancellation is submitted and sent to the supplier. The holdings data will be deleted according to the cancelled copies data.

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 the 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.

The material, which you receive on the basis of your order, is usually accompanied with a **delivery note**. You check the material and enter the delivery note data. After the delivery note is closed, the data about the receipt will be added to the holdings data. You can notify the member who has requested the purchase that the material is now available for collection.

You may receive the **invoice** for the material together with the delivery note and material, or later. 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.

Using the purchasing procedure, you can record the purchase and receipt of the material, which will be sent for exchange to another library.

Subchapters:

- Selecting the material to be ordered
- Ordering material
- Prepaying ordered material
- Receipt of ordered material
- Paying for the material received
- Revoking an acquisition procedure
- General procedures