7.1 ENTERING A LIST

When you have received a gift from a donor, enter the data about the list of the material received. First enter general data about the gift list and then also the data about each list item.

Enter the receipt of gifts in the **Gift list** class.

Precondition

The details about the donor must be recorded in the database of partners. The role of *Donor (ACQ)* must be marked.

Procedure

1. Highlight the **Gift list** class.

2. Select the **Class / New object** method.

   The **Gift list** editor will open. The acquisition type *gift* is automatically defined and you cannot change it.

3. Enter general data about the gift list (see chapter *7.1.1*).

4. Enter gift item(s) (see chapter *7.1.2*).

5. Click the **Total amount** tab.

   The total value of the list is calculated automatically, at the same time as you enter prices for list items (see also chapter *3.2.1.2.3*).

6. Save the data.

A number, which cannot be changed, will be assigned to the gift list. Gift lists are numbered automatically, in compliance with the setting of the counter for gift lists (see chapter *11.3*).

Status after entering a list

List

- *entered*

List item

- *entered*

Copy

- *in process*

What to do next

Close the gift list.

7.1.1 Entering general data

Enter general data about a gift list in the **Gift list** editor.

Procedure

1. Define the donor.

    Click the **Donor** button, which forms a link to the **Partner** class, where also partners with the role of donors are listed. The **Search – Partner** search window will open. Find and select the donor.

    If a department or contact person is specified for the donor, the link to the department or contact person will appear in relation to the list.

    > Tip:
    >
    > If you know the donor symbol, click the icon 🔍 to define the donor.

2. Under "Date of receipt", the current date will be automatically offered, which you can change.

3. Define the sending method and language of the letter of thanks, which you will send to the donor.

    The sending method and language of the letter of thanks are transferred from the database of partners. You can change both values.

4. To enter an internal note, click the **Note** button.

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

5. To enter the text that will appear on the letter of thanks preceding the list of material, click the **Thank-you text** button.

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

    If you wish the text entered to be set as a default value when entering the next gift lists, enter the symbol "*"at the end of a Thank-you text. When saving a gift list, the asterisk will be cut out automatically.

7.1.2   Entering an item

You can enter the data about a gift list item in the **Gift list item** editor.

Procedure

1. In the **Gift list** 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 the bibliographic data (see chapter *2.2*).

3. To enter an item, click the **New object** button in the **Material** editor.

    The **Gift list item** editor will open.

Bibliographic data on the material can only be viewed. You cannot change it.

4. To enter an internal note, click the **Note** button.

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

5. Enter the data on the copies received (see chapter *3.2.1.2.1*).

6. Click the **Price** tab and specify the item amount (see chapter *3.2.1.2.3*). Price per unit can be transferred from any acquisition document item or from fields 996/997 (see chapter *7.1.2.1*).

7. You can immediately accession the copies received (see chapter *7.1.2.1*).

8. Save the data.

Options   The apportionment of copies among departments for a gift list item can be printed out. Under the item, select first the **Object / Print** method, and then *Apportionment among departments – gift*.

7.1.2.1   Transferring a price

See chapter *4.1.1.2.1*.

7.1.2.2   Accessioning copies and closing a list item

See chapter *4.1.1.2.2*.

7.1.3   Adding several items to a list, using the selected template

You can place item(s) on a gift list, using the selected item template.

Precondition   The gift list status must be *entered*.

Procedure   1. In the **Gift list** class, find and select the gift list.

2. Select the **Object / Add items using the selected template** method.

    A window will open, where you can add list items.

    Select one of the item templates prepared in advance under "Item template". Data on copies will be transferred from the selected item template to the copies table.

    Click the **Continue** button.

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

3. Find and select the bibliographic record. You can select one or more bibliographic records.

    The **Gift list item** editor will open.

    This editor, however, will not open if any acquisition document item has been entered under the found record before. In such a case, the **Material** editor will open instead. To enter a list item, click the **New object** button.

    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, click the **Close** button to close the search window. Then the **Material** editor will open, where you enter the bibliographic data (see chapter *2.2*). To enter a list item, click the **New object** button.

4. Check and, if required, supplement the list item data (see chapter *7.1.2*).

5. Save the data.

    A window will open, where you can add list items.

    To enter a new gift list item, repeat the described procedure.