

Providers

Each provider profile represents a vendor account. Each vendor account used in the acquisitions process needs a provider profile. This profile contains information pertaining to contacting the provider, claiming, EDI, and holdings subfields. Providers can be edited should information change.



If you are using EDI with a particular provider and you have multiple accounts, each account will need its own provider profile.

An ongoing list of vendors who offer MARC downloads and/or EDI ordering is [here](#).

Create a provider

Providers must be created in the Acquisitions module before users can create purchase orders for providers.

1. Select Administration→Acquisitions Administration→Providers.
2. Click New Provider.
3. Fill in the fields. Information on specific fields is available in the Provider Profile.
4. Click Save.

Provider Profile

Provider

Context Org Unit

[Back](#) [Next](#) [Filter](#)

| | |
|---------------------------------------|-------------------------------------|
| Provider Name | <input type="text"/> |
| Code | <input type="text"/> |
| Owner | <input type="text"/> |
| Currency | <input type="text"/> |
| Active | <input type="checkbox"/> |
| Default # Copies | <input type="text"/> |
| Default Claim Policy | <input type="text"/> |
| EDI Default | <input type="text"/> |
| Email | <input type="text"/> |
| Fax Phone | <input type="text"/> |
| Holdings Tag | <input type="text"/> |
| Phone | <input type="text"/> |
| Prepayment Required | <input type="checkbox"/> |
| SAN | <input type="text"/> |
| URL | <input type="text"/> |
| <input type="button" value="Cancel"/> | <input type="button" value="Save"/> |

- **Provider name** <fc #ff0000>(required)</fc>
- **Code** <fc #ff0000>(required)</fc> - Create a unique code for the provider. No character limit.



This code is used throughout Acquisitions to identify the provider, so make sure it's intelligible.

- **Owner** <fc #ff0000>(required)</fc> - The owner is the organizational unit(s) whose staff can use this provider. If all organizational units can use the provider, use the system rather than one particular branch.
- **Currency** <fc #ff0000>(required)</fc> - The currency the provider is paid in.
- **Active** <fc #ff0000>(required)</fc> - Select "active" to activate the provider. Unchecking this box deactivates the provider. Providers must be active in order for purchase orders to be created from that provider.
- **Default # Copies** - Enter the default number of copies



When line items are added to purchase orders for this provider, the default number of copies will automatically be created.

- **Default claim policy** - Choose the policy that best describes the policy you will use most often with this provider. This can always be changed at the line item level at the time of claiming, so it does not need to cover all scenarios. This can be left blank if no default policy is necessary for this provider.
- **EDI Default** - Leave blank, it will be entered by PINES staff
- **Email** - Provider's email address
- **Fax Phone** - Provider's fax number
- **Holdings tag** - If your provider enters holdings data in MARC records to be imported, enter "962". Otherwise leave blank.
- **Prepayment required** - Check the box if the provider requires payment before goods are received.
- **SAN** - Leave this blank, it will be entered by PINES staff
- **URL** - The Web address for the provider's website



After you save the provider profile, the screen reloads so that you can save additional information about the provider. You can also access this Provider Details screen by clicking the hyperlinked name of the provider on the Providers screen. The tabs on the Provider Details screen allow you to add a provider address, provider contacts, attribute definitions, and holdings subfields. You can also view invoices associated with the provider on the Provider Details screen.

Add an additional address

A provider's address appears on printed purchase orders and invoices for that provider. Additional addresses can be added to the provider profile for providers with multiple offices.

1. Open the provider you would like to add an address to.
2. Click New Provider Address. A pop-up will appear.

Provider Address Provider Contact Attribute Definitions Holding Subfield Invoices

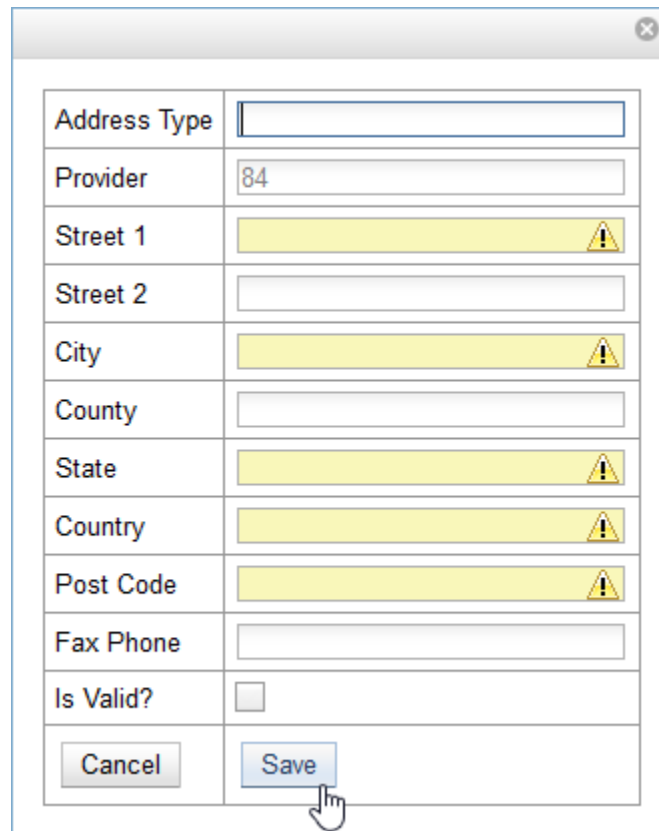
Provider Address

Back Next Filter

New Provider Address Delete Selected

| ✓ | # | Address Type | Provider | Street 1 | Street 2 | City | County | State | Country | Post Code | Fax Phone | Is Valid? |
|--------------------------|---|--------------|----------|----------|----------|------|--------|-------|---------|-----------|-----------|-----------|
| <input type="checkbox"/> | 1 | | | | | | | | | | | |

3. Enter a name for the address in the Address Type field.



A screenshot of a web form for adding a provider's address. The form is titled "Address Type" and contains several input fields. The "Provider" field has the number "84" entered. The "Street 1", "City", "State", "Country", and "Post Code" fields are highlighted in yellow, indicating they are required. Each of these fields has a yellow warning icon (a triangle with an exclamation mark) to its right. The "Street 2" and "Fax Phone" fields are empty. The "Is Valid?" field has an unchecked checkbox. At the bottom of the form are "Cancel" and "Save" buttons. A mouse cursor is pointing at the "Save" button.

| | |
|---|--------------------------|
| Address Type | |
| Provider | 84 |
| Street 1 | |
| Street 2 | |
| City | |
| County | |
| State | |
| Country | |
| Post Code | |
| Fax Phone | |
| Is Valid? | <input type="checkbox"/> |
| <input type="button" value="Cancel"/> <input type="button" value="Save"/> | |

4. Fill in the address details. Required fields are:

- Street 1
- City
- State
- Country
- Post Code

5. Check the box next to "Is Valid?" if the address is valid.

6. Click Save.

Add a contact

The names of contacts and their specific contact details can be added to providers.

1. Open the provider you would like to add a contact to.
2. Click the Provider Contact tab.
3. Click New Contact. A pop-up will appear.

The screenshot shows the 'Provider Contact' tab selected in the top navigation bar. Below the navigation bar, there are links for 'Back', 'Next', and 'Filter'. A table with columns '#', 'Name', 'Provider', 'Role', 'Email', and 'Phone' is visible. In the top right corner, there are buttons for 'New Contact' and 'Delete Selected'. A mouse cursor is hovering over the 'New Contact' button.

4. Enter the name of the contact, the contact's role, email, and phone number in the respective fields.

The screenshot shows a pop-up form for adding a new contact. It has fields for 'Name', 'Provider', 'Role', 'Email', and 'Phone'. At the bottom, there are 'Cancel' and 'Save' buttons. A mouse cursor is clicking the 'Save' button.

5. Click Save.

6. Click Reload.

Add an address to a contact

Addresses can be attached to specific contacts.

1. Open the Provider Contact tab.

The screenshot shows the 'Provider Contact' tab selected in the top navigation bar. Below the navigation bar, there are links for 'Back', 'Next', and 'Filter'. A table with columns '#', 'Name', 'Provider', 'Role', 'Email', and 'Phone' is visible. In the top right corner, there are buttons for 'New Contact' and 'Delete Selected'. A mouse cursor is hovering over the 'New Contact' button.

2. Click New Contact Address further down the page. A pop-up will appear.

Provider Address Provider Contact Attribute Definitions Holding Subfield Invoices

Provider Contact New Contact Delete Selected

| ✓ | # | Name | Provider | Role | Email | Phone |
|--------------------------|---|------|----------|------|-------|-------|
| <input type="checkbox"/> | 1 | | | | | |

Contact Address New Contact Address Delete Selected

3. In the Type field, enter the type of address for your contact.

Type

Contact

Street (1)

Street (2)

City

County

State

Country

Postal Code

Fax Phone

Valid Address?

☐

Cancel

Save

4. From the Contact drop down menu, select the ID number of your contact.

5. Fill in the address details. Required fields are:

- Street 1
- City
- State
- Country
- Postal Code

6. Check the box adjacent to "Is Valid?" if the address is valid.

7. Click Save.

Edit a provider

Provider information can be updated at any time.

1. Select Admin→Acquisitions Administration→Providers.
2. If needed, use the Filter to locate the desired provider.

Provider

Context Org Unit

3. Click the hyperlinked name of the provider you would like to edit.

Provider

Context Org Unit

[Back](#) [Next](#) [Filter](#)

| ✓ | # | Provider Name | Code | Owner | Currency |
|--------------------------|---|----------------------------------|---------|-------|-----------|
| <input type="checkbox"/> | 1 | Alibris | Alibris | WGRL | US Dollar |
| <input type="checkbox"/> | 2 | Amazon | AMAZON | WGRL | US Dollar |
| <input type="checkbox"/> | 3 | Baker and Taylor | B&T | WGRL | US Dollar |

4. Make your changes in the top half of the Provider Details screen.

| | | | |
|---|---|---------------------|---|
| Active | <input checked="" type="checkbox"/> | Code | <input type="text" value="AMAZON"/> |
| Currency | <input type="text" value="US Dollars"/> | Default # Copies | <input type="text" value="0"/> |
| Default Claim Policy | <input type="text"/> | EDI Default | <input type="text"/> |
| Email | <input type="text"/> | Fax Phone | <input type="text"/> |
| Holdings Tag | <input type="text"/> | Owner | <input type="text" value="WGRL"/> |
| Phone | <input type="text"/> | Prepayment Required | <input type="checkbox"/> |
| Provider ID | <input type="text" value="74"/> | Provider Name | <input type="text" value="Amazon"/> |
| SAN | <input type="text"/> | URL | <input type="text" value="www.amazon.com"/> |
| <input type="button" value="Cancel"/> <input type="button" value="Save"/> | | | |

5. Click Save.

Delete a provider

Before a provider can be deleted, any additional addresses, contacts, attribute definitions, and holdings subfields must be deleted first. You are then able to delete the provider on the Provider List page by checking the box adjacent to the provider's name and clicking Delete Selected.

You can only delete providers if no purchase orders have been assigned to them.

Attribute definitions

Not currently in use by PINES libraries.

Holding subfields

Holding subfields are used with a 962 Holdings Tag to allow you to specify subfields within the holdings tags to which your provider adds holdings information.



PINES staff enters holdings subfield data into your specified provider records. This is done prior to PINES staff testing EDI with your vendors. **Please do not enter Holdings Subfield data.**

View a provider's invoices

1. Open a provider.
2. Click on the Invoices tab.

| Provider Address Provider Contact Attribute Definitions Holding Subfield Invoices | | | | | | | | | | | |
|---|---|---------------------------|----------|--------------|----------|------------------|--------------|--|--------------|----------------|----------------|
| Invoices | | | | | | | | | | | |
| Back Next Filter | | | | | | | | | | | |
| ✓ | # | Vendor Invoice ID | Receiver | Shipper | Complete | Invoice Date | Invoice Type | Note | Payment Auth | Payment Method | Receive Method |
| <input type="checkbox"/> | 1 | 99096197 | CRLS | INGRAM-ADULT | True | 6/28/17 12:00 AM | paper | Generated from acq.edi_message #28439. | JWM | Check | EDI |
| <input type="checkbox"/> | 2 | 99096198 | CRLS | INGRAM-ADULT | True | 6/28/17 12:00 AM | paper | Generated from acq.edi_message #28440. | JWM | Check | EDI |
| <input type="checkbox"/> | 3 | 99001805 | CRLS | INGRAM-ADULT | True | 6/21/17 12:00 AM | paper | Generated from acq.edi_message #28435. | JWM | Check | EDI |
| <input type="checkbox"/> | 4 | 99001806 | CRLS | INGRAM-ADULT | True | 6/21/17 12:00 AM | paper | Generated from acq.edi_message #28436. | JWM | Check | EDI |
| <input type="checkbox"/> | 5 | 99001807 | CRLS | INGRAM-ADULT | False | 6/21/17 12:00 AM | paper | Generated from acq.edi_message #28437. | JWM | Check | EDI |
| <input type="checkbox"/> | 6 | 97002326B | CRLS | INGRAM-ADULT | False | 6/15/17 12:00 AM | paper | | | Check | Paper |

3. All invoices for the provider will display. Use the column headers to sort. Use the hyperlinked Back and Next to advance through the pages of invoices. You can click on the hyperlinked name of an invoice to view it.

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