

Potential Workflows

As with most things, there are several different ways to do most tasks in Acquisitions. The workflows provided below are just a jumping off place to give some structure to how you think about Acquisitions and how the process works. They are usually not the only way to do something, but they are one way to do something.

A newspaper subscription

Scenario: You have one or more subscriptions to a particular newspaper, let's call it the *Ledger-Enquirer*. As it's a rather small newspaper, you've just received a postcard that says your subscription is due to renew and how much your subscription cost is. You need to note and “pay” this in Acq so you can send it to your bookkeeper for payment.

1. Ensure that you have a provider profile created for the Ledger Enquirer (Acquisitions→Providers).
2. Create a [blank purchase order](#) that uses the Ledger Enquirer provider.
3. [Add a direct charge](#) with type “Serial Subscription.”
4. If you'd like, include something in the description/note fields. For example, if you receive the Ledger Enquirer at three of your branches and you are including them all on this PO, you would probably have each branch as a separate direct charge. So you could include in the note which branch this charge is for.
5. Choose the fund that the direct charge should be billed to, and fill in the price.
6. If you are including other branches, add those direct charges.
7. Click Save Charges.
8. If you are satisfied everything has been represented, click Activate.
9. [Create an invoice](#).
10. Fill out the invoice header information.
11. Confirm that all the direct charges that mirror the invoice/postcard in your hand are present (and nothing more!)



If you will receive more invoice/postcards—say for each of those other 2 branches—they should not be represented on this invoice. They should have their own invoice. Only represent on an invoice what you have in hand.

1. Save the invoice.
2. Close the invoice.
3. Print the invoice.

From:

<https://pines.georgialibraries.org/dokuwiki/> - **PINES Documentation**

Permanent link:

<https://pines.georgialibraries.org/dokuwiki/doku.php?id=acq:workflows&rev=1532949354>

Last update: **2018/10/11 20:15**

