

AFO 216 – Multi-title order entry

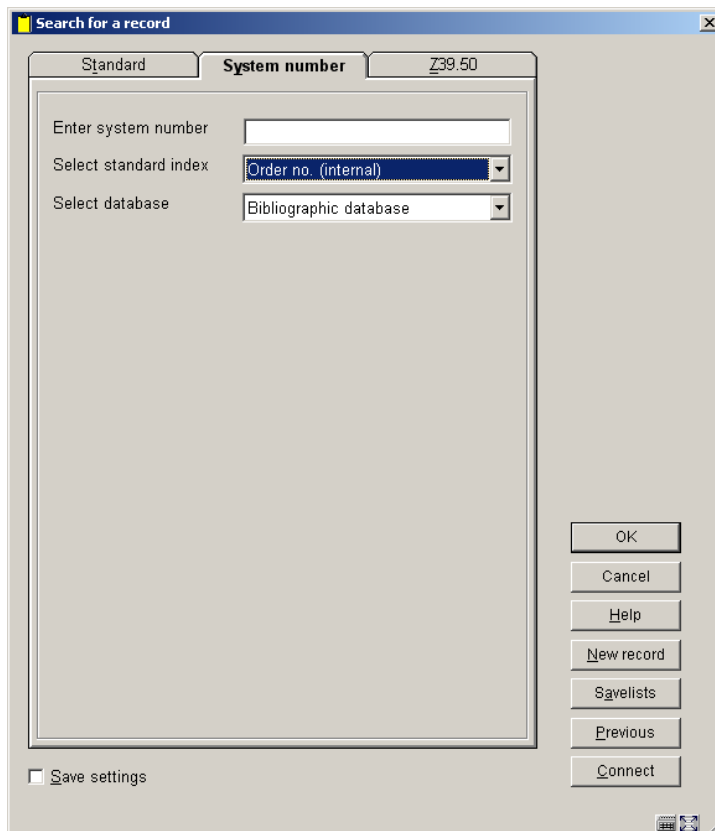
216.1 Introduction

Through AFO 216 you can add multiple titles to one order. Proceed as follows:

1. Search for an existing order or create a new one
2. Add titles to the order
3. Close the order by setting dispatch to Yes and print the order

216.1.1 Procedure

Choose AFO 216, the system will display a search screen. You can search for an existing multi-title order or create a new one by clicking on 'New record'.

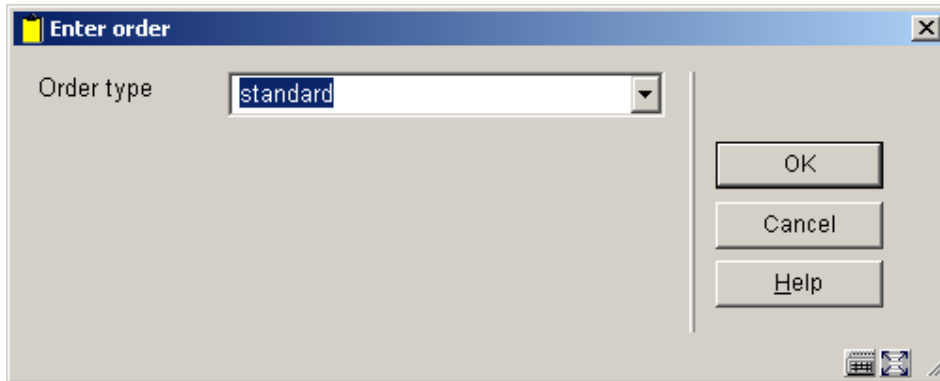


The screenshot shows a dialog box titled "Search for a record" with a close button (X) in the top right corner. The dialog has a tabbed interface with two tabs: "Standard" and "System number". The "System number" tab is selected, and the value "Z39.50" is displayed in a field next to it. Below the tabs, there are three input fields:

- "Enter system number" with an empty text input field.
- "Select standard index" with a dropdown menu showing "Order no. (internal)".
- "Select database" with a dropdown menu showing "Bibliographic database".

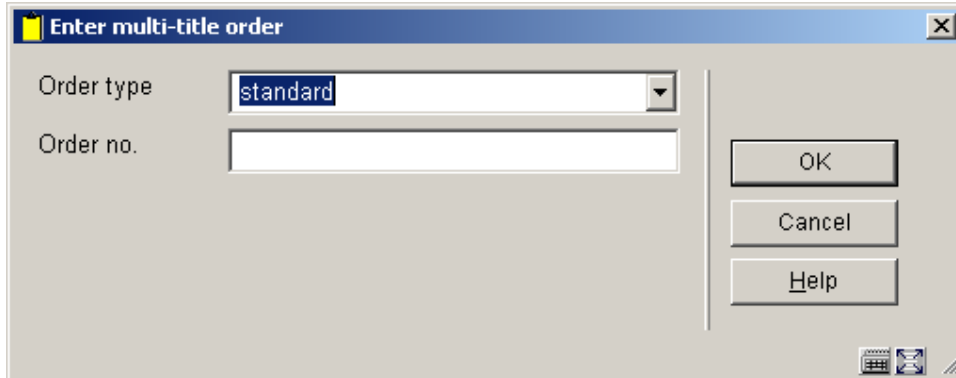
At the bottom left, there is a checkbox labeled "Save settings" which is currently unchecked. On the right side, there is a vertical stack of buttons: "OK", "Cancel", "Help", "New record", "Save lists", "Previous", and "Connect".

After clicking on 'New record' the system prompts you for **order type**. Depending on settings in AFO 272 – Miscellaneous, this input form may also contain the fields **Order no.**, **Tax code**, **Export category**. See the Help for AFO 272 for more information. The system automatically assigns an internal order number to each order. The format of this order number is determined through AFO 272 – 'Order number format'. See the description of this AFO for more details.



The screenshot shows a dialog box titled "Enter order". It features a dropdown menu for "Order type" with "standard" selected. To the right of the dropdown are three buttons: "OK", "Cancel", and "Help". The dialog box has a standard Windows-style title bar and a close button in the top right corner.

Depending on settings in AFO 272 – Miscellaneous, this input form may also contain the field **Order no.**. See the Help for AFO 272 for more information. It is possible to enter order numbers manually. A manually entered order number must be unique within the meta institution.



The screenshot shows a dialog box titled "Enter multi-title order". It features two input fields: "Order type" with a dropdown menu showing "standard", and "Order no." with an empty text box. To the right of the input fields are three buttons: "OK", "Cancel", and "Help". The dialog box has a standard Windows-style title bar and a close button in the top right corner.

After clicking 'OK' you can link a supplier. Next the multi-title order screen is shown:

The screenshot shows a dialog box titled "Enter multi-title order". It contains the following elements:

- Supplier: A text input field with a "Search" button to its right.
- Ref. no.: A text input field.
- Save settings: A checkbox with the label "Save settings".
- Buttons: "OK", "Cancel", and "Help" buttons are stacked vertically on the right side.
- Icons: A calendar icon and a help icon are located at the bottom right corner.

The discount percentage is taken from the supplier record as a default value. After clicking 'OK' you will be offered the order header:

The screenshot shows a dialog box titled "Enter multi-title order - 200600006". It contains the following elements:

- Supplier: A text input field containing the number "1" and a "Search" button to its right.
- Delivery type: A text input field containing the letter "N".
- Dispatch: A group box containing two radio buttons: "Yes" (unselected) and "No" (selected).
- Ref. no.: A text input field.
- External no.: A text input field.
- Default discount %: A text input field containing the value "7.5".
- Default tax %: A text input field.
- Commitment: A text input field.
- Buttons: "OK", "Cancel", and "Help" buttons are stacked vertically on the right side.
- Icons: A calendar icon and a help icon are located at the bottom right corner.

No		
1	Order type	standard (SSSS)
2	General data	Supplier Heinen (1)
		Delivery type N
		Dispatch N
		Ref. no. -
		Invoice -
		Donor -
		External number -
3	Order information	Number of detail lines 0
4	Financial data	Default Discount % 7.5
		Default Tax % -
		Commitment -
5	Internal notes	-
6	Supplier notes	-
7	Order status	Entered : 13 Feb 2006
8	Receipt status	Not
9	Invoice status	Not
10	Claim 1 status	Not
11	Claim 2 status	Not
12	Cancellation status	Not

The order header consists of order type, supplier information, total commitment (sum of the commitments for the linked titles), number of order lines; default discount and tax percentages; internal notes and supplier notes.

The statuses as shown in lines 7 through 12 are applied as with the detail lines of an order.

By changing the supplier on this screen you also change the supplier for the linked order lines.

The discount and tax percentages defined on this screen are the defaults for each new ordered title.

Options on the screen

“Print” icon. Click this icon to print all the order lines. You can no longer add titles after the order has been printed.

“Detail lines”. Click this icon to show the current titles linked to this order or to add more titles to this order. The detail screen is shown:

Order No./Item no. 2006-00006
 Order type standard (SSSS)
 Order status Entered : 13 Feb 2006
 Supplier Heinen (1)
 Commitment 47.63
 Number of detail lines 3

No	Title	Item no.	Ordered	Received	Invoiced	Paid	Avg. Unit cost	Status	Supplier notes
1	Dierenbaby's in het water	0001	1	0	0	0	10.00	INNNNN	
2	Voetstappen in het zand	0002	2	0	0	0	15.00	INNNNN	
3	Dochters van Khadija	0003	1	0	0	0	11.50	INNNNN	

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This screen shows static information and a grid. The static information is protected and contains order number, order type, status, supplier and number of order lines. The grid contains the order line details and shows line number, brief bibliographic details, quantity ordered, received, invoiced, paid, average unit price, status and supplier notes.

“**Next screen**”. Click this icon to show additional information.

“**Select no.**” Select a line and click this icon to show the details of that particular order (or double click on the order line). The details screen is shown where you can amend data.

Search for New Title. Use this icon to add another title to the order. The system will display the standard search screen. From this screen you can either search for an existing bibliographic record in the normal way or click the ‘New record’ button to add a new bibliographic record.

To order an existing title perform a normal bibliographic search and select a record. Double click on the filed ‘Order(s)’ to add a partial order for this title. If there are existing orders the overview screen with orders for this title will be displayed (you do not have the option to look at or amend detail lines from this screen). You can add a partial order for this title in the normal way. When you have finished this, the order overview screen will be displayed.

When clicking on the 'Back' button from this screen you are taken back to the search screen "Search for a title to add to current order". From here you can search for another title to order or you can click on the 'Cancel' button which will take you back to the "Order detail multi summary" screen. You can decide at any moment to stop and continue at a later time. Order lines can be added to an unsent order by searching for the order header and then choosing to add more titles.

To complete the order and ensure it will be printed you must set the dispatch status on the order header screen to Yes. This ensures that the status for all associated orders will be set to Yes. The order can then be printed in the normal way via AFO's 251, 252 and 253, just like for orders created via AFO 211.

You cannot add new titles to a completed order.

- **Document control - Change History**

Version	Date	Change description	Author
1.0	unknown	creation	
2.0	November 2006	updates for release 2.4.2 build 1	
3.0	March 2007	minor modifications	