Receiving YBP

YBP Receiving

Required privileges to receive:

Sirsi Workflows - Full Acquisitions privileges
G drive / Acquisitions folder
Shared email - acq-monographs@ncsu.edu

Pull YBP invoice with items connected, from the Bookroom shelves

In the Acquisitions Module > Orders toolbar > Modify Order.

1. Search For: [AQD:title]
   a. Verify title information
   b. Check book to make sure it matches, and is in acceptable condition.
   c. If more than one PO, verify which is for YBP item.
   d. Write purchase order number next to title on invoice (only if problem or added copy)

2. You should be looking at Modify Order, Orderline tab
   a. Look for special info in [AQD:NOTE] field:
      i. Note if the item is an added copy
      ii. Note if the item is a Rush or Notify status for a patron
      iii. Note if the item is a Textbook or Course Reserves item for the Reserve desk
      iv. Note if the item is an Endowment purchase
         1. See Memorial books
         2. See Honor with Books
         3. See Bookplate Installation

3. Go to Segments tab
   a. Go to [Received:] field, change to "TODAY" if currently "NEVER"
   b. Go to [Loaded:] field, change to "TODAY", if currently "NEVER"
   c. Flag book with appropriate flag based on Holding code

In the Cataloging Module > Titles toolbar > Modify Title

1. Search For: [AQD:title],
   a. Title should already be listed in 'Current:' title and hyperlinked
   b. Choose title and Modify

2. You should be looking at Modify Title, Bibliographic tab
   a. Verify that the bibliographic record meets Rapid Cataloging Criteria.
      i. If not, try to find a better record in OCLC and export thru Smartport
   b. Delete any 856 in the bibliographic record if item is print
   c. Click Save Changes button at bottom of screen.

3. Go to Call Number/Item tab
   a. Verify properly formatted Call Number, TT508 (classification) .M56 (cutter; may be two) 2012 (year of pub)
   b. Verify correct Library is displayed as specified in Order record's Segments tab
   c. Verify Home Location is same as Order record's Segments tab
   d. Verify Current location as INPROCESS
   e. Verify proper Item ID

4. Click Save, then Close
5. Go to Next Title on Invoice beginning at top of instructions in Acquisitions Module. If last title proceed to Paying the Invoice.

---Pay the invoice

Open Acquisitions Module > Invoice > Modify Invoice

Invoices with No Freight Charges

If Invoice has no shipping or freight charge, use the following procedure. If invoice shows shipping or freight charge jump to next section and follow instructions for Invoices with Freight Charges.

1. Search invoice number [AQD:top right order of paper invoice]
2. Be sure you click the Invlines tab
3. Match the lines on the invoice to the paper invoice
4. Verify dollar amounts on titles and total charge are same on print invoice and in Sirsi.
5. Click on the middle icon of the icons at the top -- Display Funds Summary
   a. If there is a single unique Account Number – write the account number on the invoice, directly under the stamp on the page which shows the total charge
   b. If there are multiple unique Account Numbers – print Display Funds Summary screen and add to invoice packet
   c. Initial and date the top left corner of the invoice verification stamp on the invoice page which shows the total charge
   d. Verify that Invoice tab shows a Total amount paid and then pass invoice packet on to Sharon.

Invoices with Freight Charges

1. Search invoice number [AQD:top right order of paper invoice]
2. Be sure you click the Invlines tab
3. Match the lines on the invoice to the paper invoice
4. Verify dollar amounts on titles.
5. Check printed invoice for shipping charges.
   a. If shipping or freight charge shows on printed invoice you must reverse payment on invoice in Sirsi
      i. Go to Invoices toolbar > Reverse Payment
      1. Search the invoice number and then choose Reverse Payment.
6. Go to Invoices toolbar > Modify Invoice
   a. Click on the middle icon of the icons at the top -- Display Funds Summary
      i. If there is a single unique Account Number - write the account number on the invoice, directly under the stamp on the page which shows the total charge
      ii. If there are multiple unique Account Numbers - Print Display Funds Summary screen and add to invoice packet
      iii. Initial and date the top left corner of the invoice verification stamp on the invoice page which shows the total charges.
7. Now you must add the freight/shipping charge on a new invoice line as outlined in the following section.

Add Freight/Shipping Charge to Invoice

Open Invoice toolbar > Add Invoice Lines -- click current invoice

1. Click far left icon on lower row of icons, this is the Add Invoicelines icon
2. Check for freight cost at bottom of paper invoice.
3. Add an invoiceline for shipping using the following details on the add invoiceline screen
   a. LINE -- type SHIPPING
   b. AMOUNT -- dollar amount of Shipping / Freight from printed invoice
   c. LINK -- Dropdown and choose Line Prorated
   d. Click the Add Invoiceline button
   e. Be sure the Total matches the print invoice

*This invoice needs to be prorated. … this line will appear at the top of the page

1. To Prorate Invoice click on the far left icon on the upper row
2. Click OK to the window “Invoice has been prorated”

*Before paying invoice click on the Invoice tab and scroll down to the Extended Information lines

1. Fill in the following
   a. RECEIVER -- type Initials
   b. DATERECVD -- 1/12/13

Open Invoices toolbar > Pay Invoice

1. Bring up the invoice by number (or current)
2. Lines should all be checked.
3. Click Pay Selected Lines button at the bottom.

Click Close in the box that appears

To verify the invoice is paid - reopen Modify invoice and check the column *Date Paid