

## Canceling an Order

### Procedures Manual

rev. 8/12/09

It is possible that some of our book orders are not filled (e.g., books are out of print) and, hence, need to be canceled. Consequently, we have to reflect the cancelation of the title in the PO. We occasionally let the vendor know that we would like to cancel an order, for it has not been filled after a long period of time. Most of the time, however, the vendor informs us that they cannot fill the order. How to cancel an order?

- 1) Call up the PO in Acquisitions module

Line #/Status	Title	Price (Adjustments)	# of Copies	Location	Fund	Line Total	Line Item Type	Notes
1 / Approved	Fire in my heart : Kurdish ta	\$35.00	1	Main Collection	Materials Budget '08-'09 / I	\$35.00	Single Part	this a dummy po

- 2) Highlight the title to be canceled (some POs have multiple line items)
- 3) Click on the Receive/Mark tab
- 4) Click on the box with the **red** outline

Purchase Order: 11136 - [Approved/Sent] on 4/16/2009

File Order Line Item Tools Help

Save Save and Close Base Currency

Header Footer Notes Properties Vendor History Related Invoices

Order

Number: 11136  
 Type: Firm Order  
 Site: ACQUISITIONS

Vendor

Code: OAK KNOLL  
 Account:

Status Date: 4/16/2009  
 1 Line Items on Order

Locations

Ship To: ACQUISITIONS  
 Bill To: ACQUISITIONS

Amounts

Line Item Subtotal: \$35.00  
 Other Charges: \$0.00  
 Total Order Amount: \$35.00

Currency

Code: USD  
 Rate: 1

**Receive/Mark**

Select Copies to Receive or Mark:

<input checked="" type="checkbox"/>	Title	Copies Ordered	Copies Received	Copies Invoiced
<input checked="" type="checkbox"/>	Fire in my heart : Kurdish tales / retold by Diane Edgr	1	0	0

Item  
 Print Label...

Line #/Status Title

1 / Approved Fire

Notes  
 this a dummy po

Mark Reason:  
 Comment:

Receive  
 Mark  
 Close

RecvMark... Unmark Generate Claim Update Claim Generate Cancel Generate Return Quick Line Item... Detailed Line Item... MARC...

5) Go to Mark Reason and choose Cancel

Purchase Order: 11136 - [Approved/Sent] on 4/16/2009

File Order Line Item Tools Help

Save Save and Close Base Currency

Header Footer Notes Properties Vendor History Related Invoices

Order: Number: 11136 Type: Firm Order Site: ACQUISITIONS

Vendor: Code: OAK KNOLL Account: Status Date: 4/16/2009 1 Line Items on Order

Locations: Ship To: ACQUISITIONS Bill To: ACQUISITIONS

Amounts: Line Item Subtotal: \$35.00 Other Charges: \$0.00 Total Order Amount: \$35.00

Currency: Code: USD Rate: 1

Receive/Mark

Select Copies to Receive or Mark:

Title	Copies Ordered	Copies Received	Copies Invoiced
<input checked="" type="checkbox"/> Fire in my heart : Kurdish tales / retold by Diane Edg	1	0	0
<input checked="" type="checkbox"/> Location	Call Number		Copies Ordered
<input checked="" type="checkbox"/> Main Collection	Main Collection		1

Mark Reason: Cancel

Comment:

Receive Mark Close

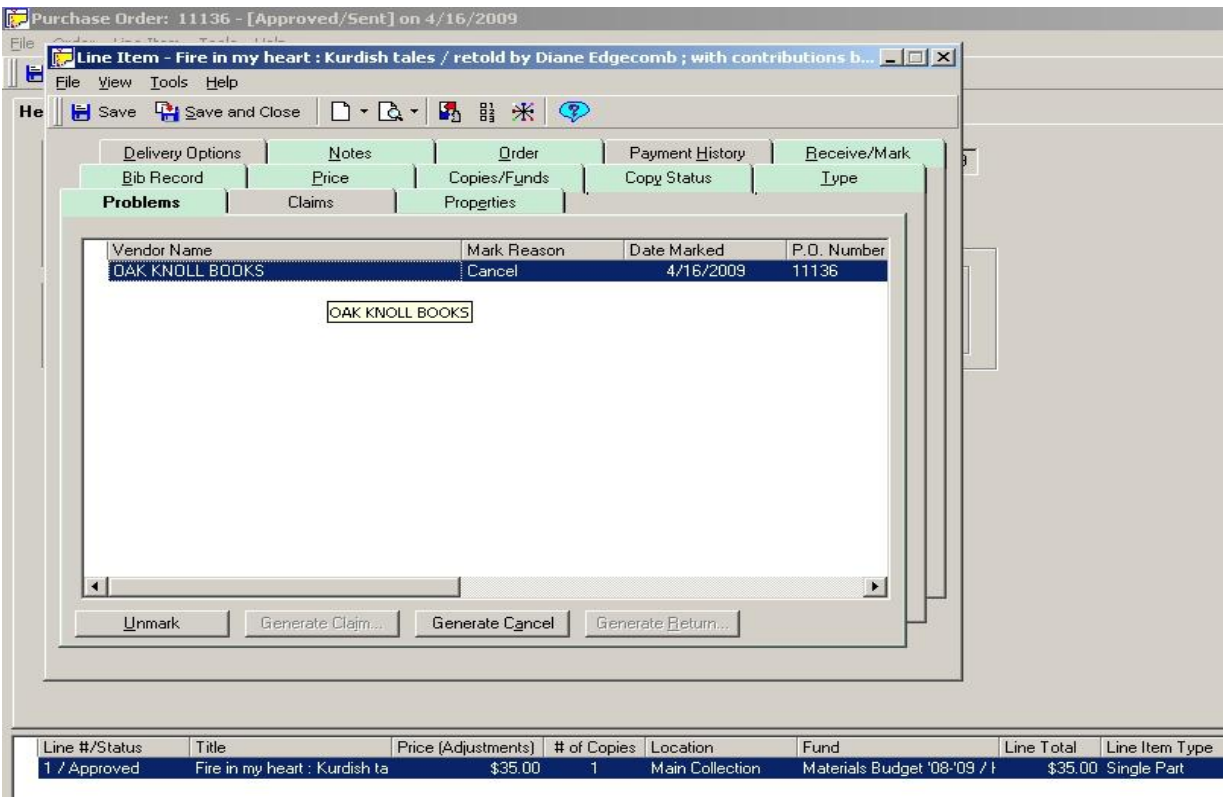
Line #/Status Title

1 / Approved Fire

Notes

this a dummy po

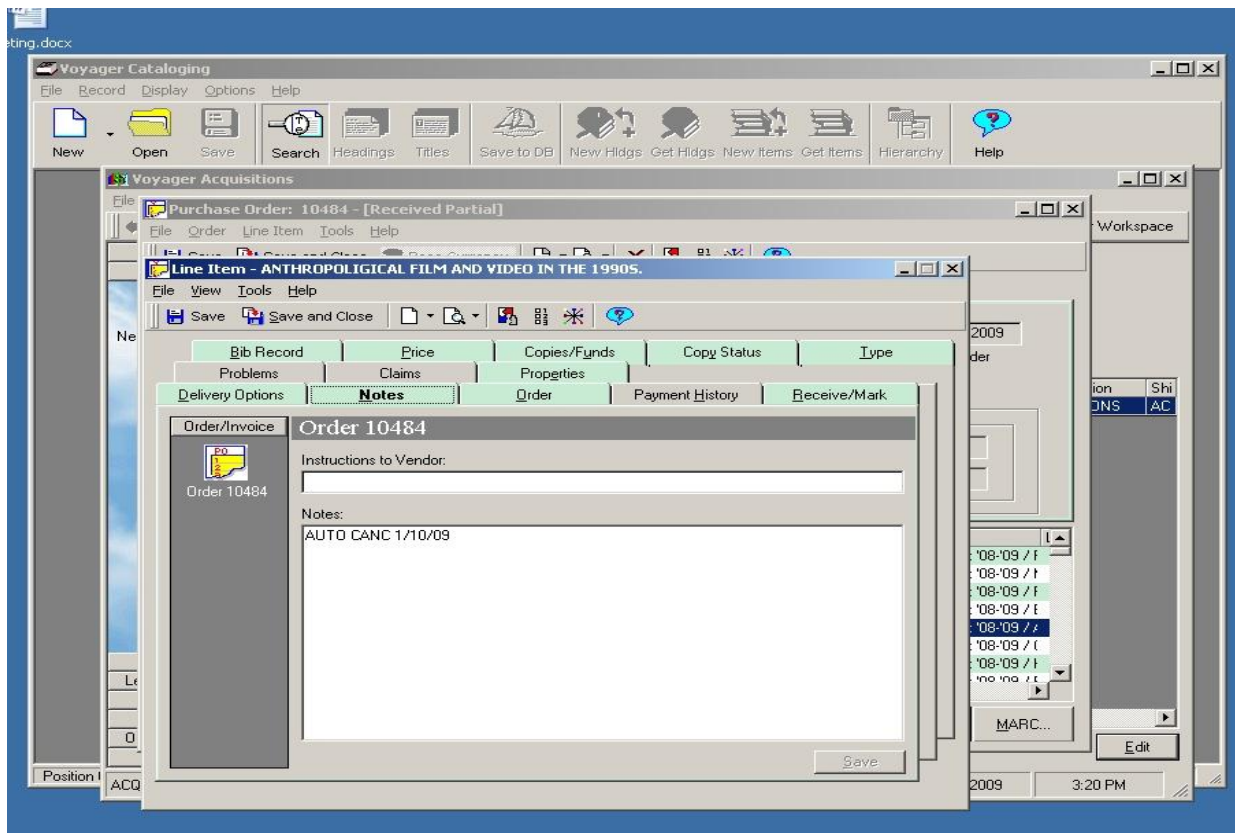
- 6) Click MARK and close.
- 7) Then go to the Detail Line Item menu
- 8) Click on the Problems tab and the title canceled will appear in the work space
- 9) Click on the title and click on the Generate Cancellation tab



10) A dialog box will appear to make sure that you want to cancel the title

11) Click on Yes for the cancellation

12) Also enter into the Notes field the reason for the cancellation for future references, for example, AUTO CANCEL 1/10/09. That is, the book is perhaps unavailable and the vendor cancelled the order after a certain period of time.



- 13) If the cancellation report needs to be sent to the vendor, then proceed to the Reporter module on the desktop and print out the report to send to the vendor. If we don't have to send the cancellation report to the vendor, it is not necessary to generate a cancellation report.
- 14) If a title is canceled, the bib record should be suppressed in the catalog since every line item in the PO is attached to a bib record
- 15) Pass the cancellation report cards back to Doris Kammradt.

### **Claiming an Order**

Claiming an item is done the same way as the cancellation process.

- 1) Bring up the PO, highlight the title, and click on the Receive/Mark tab
- 2) Click on the box with the **red** outline
- 3) Proceed to Mark Reason and choose Claim
- 4) Write in the Comment area necessary information such as "PLS Send or Advise"
- 5) Click on MARK and close

- 6) If necessary update the info in the Notes area in the Detailed Line Item menu
- 7) Go to the Problems tab in Detailed Line Item menu
- 8) Click on Generate Claim
- 9) Then choose Claim type: “No Copies Received”
- 10) Go to Reporter and print out the Claim Report to be sent to the vendor