

Electronic Ordering & Invoicing with EDI - WHITEPAPER



Questions? Contact Marin Lindsay by phone at 866-698-2231 or by email MLindsay@midwesttapes.com

CVS Midwest Tape offers Electronic Ordering and Invoicing as an option with the majority of Integrated Library Systems (ILS).

- We support both EDIFACT and X12 formats for EDI (Electronic Data Interchange).
- The option to place orders via EDI is most advantageous to libraries who wish to receive EDI invoices. Only items ordered electronically can be invoiced electronically.
- Electronic ordering and invoicing are available free of charge.
- Once we have your information, we'll complete your free and simple setup in just a matter of days.

How It Works

With EDI ordering, you would use whatever ordering method you normally use within your ILS. For most EDI customers, this consists of creating carts on the CVS Midwest Tape website and then downloading vendor order records complete with fund and location information for the titles you're ordering. Import these records into your ILS to create the order within your system. (Please see the whitepaper entitled "[9xx Ordering](#)" for more information on the setup of order records.)

Once the order exists in your ILS, you can then send it to us using EDI. The order transmits electronically via FTP (File Transfer Protocol) and arrives on the CVS Midwest Tape server, which imports it into our system as an order.

Once we successfully import your EDI order into our system, you will receive an order acknowledgment verifying your ordered titles. When you receive this acknowledgment, go back to our website and delete the cart. This eliminates duplicate ordering. Please note: deleted carts are still available for viewing on our website; they are simply not available for reordering.

Once received in our system, we'll handle your order as usual, applying any additional services, such as processing, that you have designated. We will invoice your items as they ship. You will still receive a paper invoice in your package; if you have requested electronic invoicing, you will also receive an electronic invoice via FTP shortly after shipping.

How to Get Started

To set up EDI ordering and/or invoicing, email Marin Lindsay (MLindsay@midwesttapes.com) with your contact and ILS information. Once setup is complete, Jamie will email your FTP folder, login, password, and the SAN (Standard Address Number) needed to transmit your orders. Once you submit your first order, please give Jamie a call at 866-698-2231 to verify that we received the order properly. Once we've verified the process, you can place your orders electronically going forward.

Additional Information

Submitting carts via our website is the easiest, most accurate way to place your orders. Due to restrictions within individual Integrated Library Systems regarding the transfer of information, we'll need to make some adjustments in order to have the best results with EDI ordering.

SIRSI

SirsiDynix Classic, Unicorn, and Symphony systems specify that every item ordered must have an ISBN. Typically, less than 50% of DVD titles have an ISBN, and music CDs rarely possess one. To get around this issue, if you use 9xx order records, we will program our product stock number to appear in your 946 tag subfield 'a.' You can then map this in your system to have our stock number replace the missing ISBN data where necessary (see image below).

The screenshot displays the SIRSI software interface. The main window is titled "Modify Title" and contains several tabs: "Basic", "Load", "Order Options", and "Print Options". The "Order Options" tab is active. The "Order Options" section includes fields for "Maintenance library" (HHL), "Order ID" (Auto-generated order ID, one orderline per bib record), "MARC tag number" (empty), "Vendor ID" (BT ADULT FICTION), "Order type" (FIRM), "Fiscal cycle" (2008), "Unit price tag number" (947), "Currency" (US), and "Requisition number" (empty). The "Additional ordering information" section contains "MARC tag number: 945" and "Subfield: a", which are circled in red. The "Segments information" section shows "947@FUND_ID#FUND_COPIES#HOLDING_CODE1" and a checkbox for "Set date mailed, date to claim, date to cancel". A "Gadget : Segments..." dialog box is open, showing "Segments tag number: 947", "Fund ID subfield: f", "Quantity funded subfield: q", and "Holding code subfield: j". The "Gadget : Segments..." dialog box has "OK" and "Cancel" buttons. The "Modify Title" dialog box has "Schedule", "Run Now (b)", "Save As Template", and "Cancel" buttons. The "Modify" button is also visible at the bottom of the window.

Horizon

In order for us to receive branch quantity information in an electronic order from your Horizon system, you will need to check the 'Vendor Enhanced Services' box (see image below).

The screenshot displays the 'Contracts/Accounts' window in the Horizon system. The window title is '02116: Main Account'. The interface includes a menu bar (File, Edit, View, Tools, Window, Help) and a toolbar with various icons. The main form area contains the following fields and options:

- Code:** 02116
- Date:** 04/27/2006
- Description:** Main Account
- Type:** Pre-encumbered Funds Vendor Deposit Account
- Cust/Acct Number:** 02116
- Original Amount:** 0.00
- On Order:** 0.00
- On Order Limit:** 100.00 %
- Spent:** 0.00
- Spent Limit:** 100.00 %
- Vendor Enhanced Services:** (indicated by a red arrow)
- SAN suffix:** [Empty]
- Discount (%):** [Empty]

Below the main form, there is a section for 'Vendor Enhanced Services' with the following fields and options:

- Vendor Enhanced Services:** (indicated by a red arrow)
- EAN:** [Empty]
- SAN:** 2549913
- SAN suffix:** [Empty]
- Discount (%):** [Empty]
- Type:** Primary Secondary
- Status:** Open Closed
- Printed PO Options:** Unique Line Numbers Include Unit Price
- VIP configuration:** [Empty]

At the bottom of the window, there are buttons for 'Close', 'Save', 'Page Up', and 'Page Down'. The status bar shows 'Page 2 of 2'. At the very bottom, there are buttons for 'List Vendor' and 'Edit Vendor'.

Innovative

In order for us to receive branch distribution information in an electronic order from your Innovative ILS, you will need to set the GIR code to the number 1 in your Vendor Setup Screen (see image below). If you are using 9xx order records, we will also program our product stock number to appear in your 961 tag subfield 'h' to assist in title identification. You would map this to your VEN NOTE field in your Innovative software.

File Edit View Go Tools Admin Help

Vendor Maintenance

Print Data Print Save View Help Error Close

Vendors

Current Vendors

Hierarchies

Vendors Invoices

v1000161x Last Updated: 04-17-2008 Created: 01-11-2005 Revisions: 5

CLAIMCYCLE	b	RECEIFTS	168	EPRICE CNCL	\$9,123.61
VCODE1	- NONE	INVOICES	0	AVG WEEKS	12
VCODE2	- NONE	ORD CLMD	0	DISCOUNT	0
VCODE3	d EDIFACT	CPY RCVD	1682	VENDOR MSG	
ORDERS	327	ORD TOT	\$77,002.92	LANGUAGE	
CLAIMS	0	INV TOT	\$32,799.28	GIR CODE	1
CANCELS	33	EPRICERCVD	\$36,916.18		

VENCODE mid-e

VENNAME MidwestTape Edifact

ACCTNUM 87102

ADDRESS1

MidwestTape
6950 Hall Street
P.O. Box 820
Holland, Ohio 43528

PHONE NUM 800-875-2785

FAX 800-444-6645

NOTE3 \$VENDSAN=2549913

Polaris

Customers using Polaris as their ILS typically have few or no issues when using EDI ordering. Simply check the "Accepts EDI Orders" box in your supplier record (see image below) and fill in the information we'll supply to you. If you receive shelf-ready product or need your branch/location information to come through in your order, simply check the "Accepts Enriched EDI Orders" box as well.

New Supplier Record - 1 - General - Polaris

File Edit View Links Tools Help

Supplier

Supplier name: **Alternative name:**

SAN: : Account no.: **Owner:** West Slope Community Library

Encumbrances

Total:	<input type="text"/>	\$0.00
Supplier limit:	<input type="text"/>	\$0.00
Order limit:	<input type="text"/>	\$0.00
Line item limit:	<input type="text"/>	\$0.00

Expenditures

Total:	<input type="text"/>	\$0.00
Supplier limit:	<input type="text"/>	\$0.00
Invoice limit:	<input type="text"/>	\$0.00
Line item limit:	<input type="text"/>	\$0.00

Communications

Accepts EDI orders Accepts enriched EDI orders Address/profile ID: Account # SAN/SAN Suffix

Username (FTP): **Password (FTP):**

Address (FTP): **PO directory (FTP):**

POA/INV directory (FTP): Data phone no:

File extensions: **PO:** **POA:** **INV:** Production PO: Yes No (test)

Notes

General:

Plan:

For Help, press F1 NUM

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