Alma Essentials -- Acquisitions

Vendors

Welcome to this training session on acquisitions in Alma. In this session, you'll learn about vendors and vendor accounts, and how to create them in Alma.

A vendor in Alma is an aggregator or publisher that sells library materials to your institution.

As part of the Acquisitions Infrastructure, vendor and vendor accounts need to be configured before purchasing, receiving, and invoicing can take place. So, here's how to configure a new vendor in Alma.

Start on the Acquisitions menu, find the Acquisitions Infrastructure section, and select Vendors. By the way, to create and configure vendors, you will need to have the Vendor Manager role in Alma.

This brings you to the Search Vendors page, with a list of the existing vendors. Note that you can search the vendor list using the search bar at the top of the page, and filter by vendor status (All, Active, and Inactive), and filter by vendor type as well.

Click Add Vendor to start creating a new vendor.

On the Vendor Details page, fill in the Name of the vendor, and then enter a unique code for the vendor. Next, select the library or libraries at your institution that will be working with this vendor. You can keep the selection for your whole institution, or delete that selection and choose specific libraries.

Next you select Vendor Type. Vendors that are a material supplier or a subscription agent are organizations that you pay to provide your institution with resources. Access providers are vendors that provide access to electronic resources. Sometimes the access provider is the same vendor as the material supplier or subscription agent; and other times they are two different vendors. Licensors provide licenses to other vendors' electronic resources. Governmental vendors provide materials or access, and they receive a use-tax for an invoice payment from non-governmental vendors.

For this example, the vendor is a Material Supplier. The page refreshes and a notice appears, reminding you that "Active vendors with Material Supplier must have at least one active vendor account." And at the bottom, the Account section has appeared.

A vendor account contains information that describes how to perform business activities with this vendor, including details like payment method, delivery, and claim information.

Certain types of vendors, like material suppliers, must have at least one vendor account, because purchase orders are linked to vendor accounts. Other types of vendors don't require accounts because they are not involved in purchasing. For example, if this vendor was a Licensor, the Account section would not appear here.

Click Add to start configuring an account for this vendor.

This is the Vendor Account Details page. The example in this session will only use required fields, such as the account description and code, and the payment methods accepted by the vendor. But this is also the place to enter things like your institution's Financial System Account code, and discount percentage offered by the vendor.

In the Delivery and Claim Information section, enter details about when you can expect to receive orders from the vendor, give the vendor a grace period before filing a claim for undelivered items, and so on.

Then click Save at the top of the page.

Back on the Vendor Details page, there are now a series of tabs that can contain additional information about the vendor. This training session won't cover all the tabs, but documentation is available to guide you through everything.

One tab to look at now is Contact Information. Here you will enter a vendor's physical address, phone numbers, general emails, and web addresses. By the way, some acquisitions transactions require a vendor email address, so be sure to add one here.

Use the Contact People tab to add specific individuals at the vendor that your institution may need to communicate with. By the way, when you add a contact here, they will also appear on your Alma User list as a Contact type.

EDI Information is used by vendors that allow automated, electronic ordering from Alma, using Electronic Data Interchange protocols.

Usage Data can be added here manually in files you get from the vendor. However, if this vendor allows Alma to automatically retrieve usage data using the SUSHI protocol, you can set up that account information here.

And after you start ordering from this vendor, the tabs with invoices and PO Lines will be available to see those items associated with this vendor.

There is even a tab to give you direct access to some analytics information, after you start placing orders with the vendor.

Be sure to click Save, so all of the information is stored with this vendor. Back on the Search Vendors page, whenever you need to make changes to the vendor, use the row-action Edit to open the Vendor Details page again.

And that is how you set up vendors in Alma!