

Edit Organization screen changes:

(changes to existing screen and accordions noted in yellow)

# New order for the accordions

1. Summary
2. Contact information
3. Contact people
4. Interface
5. Vendor information [red accordions only show when Org is a Vendor]
6. Vendor terms [formerly Agreements accordion]
7. EDI information
8. Accounts

# Edit Organization changes - 1

×

Edit: EBSCO SUBSCRIPTION SERVICES

Update vendor

Collapse all

^ Summary

Name\*

EBSCO SUBSCRIPTION SERVICES

Code\*

SREBSO

Accounting code

G64758-74837

Vendor status\*

Select Status

Default language

-- Select Language --

Alternative names

Alias\*

EBSCO

Description

Remove

+ Add

Change to Update organization

Change to Organization status\*

Fix case

Fix case

Add checkbox for Vendor

Remove + sign

# Edit Organization changes - 2

## ^ Contact information

### Address

Address 1

10 ESTES ST

Address 2

PO BOX 682

City

Ipswich

State/Province/Region

MA

Zip/Postal code

01938

Country\*

United States

Default language

English

Categories

Remove

+ Add Address

### Phone numbers

Phone number\*

1-800-653-2726

Type

-- Select Type --

Language

-- Select Language --

Categories

Remove

+ Add Phone Number

Remove +  
sign and fix  
case

Fix case

Fix case

Remove +  
sign and fix  
case

# Edit Organization changes - 3

Email address

Email address \*

jbeck@ebSCO.com

Description

Customer Service Rep

Language

-- Select Language --

Categories

Remove

Fix case

+ Add Email

Remove +  
sign and fix  
case

URLs

URL \*

http://www.ebSCO.com

Description

main website

Language

-- Select Language --

Categories

Remove

Fix case

+ Add URL

Remove  
+ sign

^ Contact people

Josh Beck



# Edit Organization changes - 4

^ Agreements

Move this accordion below Vendor Information accordion and rename as **Vendor terms**

Name *	Discount %	Reference URL
XXXXXX credit	0	

Notes

Remove

+ Add

Remove +  
sign

# Edit Organization changes - 5

^ Vendor information

Payment method  
EFT

☐ Access provider  
☐ Governmental  
☐ Licensor  
☐ Material supplier

Vendor currencies  
USD X

Claiming interval  
60

Discount percent  
10

Expected activation interval  
0

Expected invoice interval  
30

Expected receipt interval  
30

Renewal activation interval  
0

Subscription interval  
0

^ Tax

Remove these categories

Move these to first column

Move these up (trying to even out the columns after categories removed)

The image shows a screenshot of a 'Vendor information' form. On the left, under 'Payment method', there is a dropdown menu set to 'EFT'. Below it, a group of four checkboxes is enclosed in a red box with a large red 'X' over it. These checkboxes are labeled 'Access provider', 'Governmental', 'Licensor', and 'Material supplier'. A yellow speech bubble with the text 'Remove these categories' has an arrow pointing to this red box. To the right of the form, there are several input fields: 'Claiming interval' (60), 'Discount percent' (10), 'Expected activation interval' (0), 'Expected invoice interval' (30), 'Expected receipt interval' (30), 'Renewal activation interval' (0), and 'Subscription interval' (0). A red line connects the 'Remove these categories' speech bubble to a larger yellow speech bubble on the right that says 'Move these to first column'. Another yellow speech bubble on the right says 'Move these up (trying to even out the columns after categories removed)' with an arrow pointing upwards. At the bottom left, there is a section header '^ Tax'.

# Edit Organization changes - 6

## ^ Tax

Tax ID

Tax percentage

0

☐ Liable for VAT

## ^ EDI information

### ^ EDI Basic

Vendor EDI code

xx-xxx014186

EDI naming convention

\*.edu

Vendor EDI type

31B (US-SAN)

☐ Send account number

Library EDI code

VOY0081

What Messages are expected for this Vendor?

☐ Support order

☐ Support invoice

Library EDI type

31B (US-SAN)

☐ Prorate tax

☐ Prorate fees

Notes

Change to  
EDI basic


Change from  
"Support invoice"  
to "Invoices"

Change from  
"Support order" to  
"Orders"

Fix case for  
"messages"  
and "vendor"



# Edit Organization changes - 7



^ FTP details

EDI FTP

SFTP

FTP mode

-- Select --

Server address

https://ftp.ebsco.com

FTP connection mode

-- Select --

Username

edi\_username

FTP port

22

Password

.....


Show

Order directory

Invoice directory

Notes

# Edit Organization changes - 8




^ Scheduling


☐ Schedule EDI

Notification options

Date

MM/DD/YYYY 

Time

h:mm A 

Send to emails

bobbarker@priceisright.com

☐ Notify all EDI

☐ Notify invoice only

☐ Notify error only

Weekly

☐ Monday ☐ Friday

☐ Tuesday ☐ Saturday

☐ Wednesday ☐ Sunday

☐ Thursday

[Check now](#)

Notes

# Edit Organization changes - 9

^ Interface

Name

EBSCONet

URI

https://www.ebsconet.com/

Username

username

Password

....

Show

Notes

all staff have different logins and permissions associated with them

Statistics

☐ Available

Delivery method

-- Select --

Statistics format

-- Select --

Locally stored

false

Online location

Statistics notes

Remove

Remove  
+ sign

+ Add

Move this accordion above  
Vendor Information  
accordion

# Edit Organization changes - 10

## ^ Accounts

Name\*

Serials

Account Status\*

Active

Account Number

BRXXXX-01

Contact Info

Some basic contact

Description

Print serial subscriptions

Library Code\*

-01, -02, -03

Acct. payable sys. no.

Library EDI Code\*

VOY0081

Payment Method\*

EFT

notes

Remove

+ Add

Remove +  
sign

Fix case

Fix case

Fix case

Change to  
Accounting code

Fix case

Fix case

Fix case for  
"code"

Fix case for  
"code"