



PO Line number and title Included in subject of claim letter

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Introduction

Introduction

- The March 2019 release includes a new option to configure the subject of the PO Line Claim letter (letter code: POLineClaimLetter).
- For all PO line types, the PO line number and title can be included in the email subject.
- If the PO line type is physical continuous, the item description can also be included. For non-predicted continuous orders, the expected received date can be included.

Introduction

- This feature greatly enhances communication with vendor.
- The vendor immediately knows the order number and title when receiving the letter, and for POLs of type continuous the vendor also knows that specific issue is being claimed.

Setting it up

- The fields for the Subject are available in the new_subject field.
- The field is set by entering your text within <> + field name. The format is as follows:
- <The text you want before the title> title < The text you want before the POL number> poline_reference_number < The text you want before the item description> item_description

Setting it up

- Following are the fields that can be used within the subject field:
 - title
 - poline_reference_number
 - item_description - only for Physical Continuous type
 - identifier_type and item_identifier
- In our example we will set the email subject of the PO Line Claim Letter as follows:

```
<Title : > title <Order Number: > poline_reference_number <Item: > item_description
```

Setting it up

- For example:

Filter : English ▾

	Enabled	Code	Description	Translation
1	<input checked="" type="checkbox"/>	newSubject	<Title : > title <Order Number: > polin	<Title : > title <Order Number: > poline_reference_number <Item: > item_description



Example for Physical One Time POL

Example for Physical One Time POL

- We will now look at a claim for POL-45453, title “Roman Women : their history and habits”.
- It is in status "Sent" with a receiving date of July 1, 2019, which is over a month ago.

Example for Physical One Time POL

Roman women: their history and habits., London,, Bodley Head, [1962], Edit Change Bib Reference ...

MMS ID: 99203311300121	Copies: Main Library - General (1)	Receiving note: -
Assigned to: -	Total price: 20.00 EUR	Sent date: 20/08/2019
Type: Physical - One Time	Funds: Library and Information Science (100.0%) (01/01/2019 - 31/12/2019)	The bib record is brief
PO line owner: Main Library	Vendor/Account: E Zafrani Physical and Electronic Resources Ltd. / Zafrani Physical and Electronic Resources Ltd. Main Account ZERMAIN	Reporting code: Book
Standard number: -		Secondary reporting code: Computer Sciences
PO: PO-107113 / (Sent)		Tertiary reporting code: Users request
PO line: POL-45453 / (Sent)	Vendor reference ID: -	
	Expected delivery: 01/07/2019	

Physical One Time (1)

Example for Physical One Time POL

- The regularly scheduled job "PO Line Claiming" runs

Monitor Jobs

Scheduled Running History

1 - 20 of 142 Job details

Refresh

Job Category: All Status: All Submit Date Range: 19/08/2019 - 20/08/2019


Name	Job ID	Job Category	Operator	Submit Date	Start Date	End Date	Status	
PO Line - Claiming	5950899...	Acquisition	ex_impl <input type="button" value="👤"/>	20/08/2019 17:04	20/08/2019 17:04	20/08/2019 17:04	✔️ Completed Successfully	<input type="button" value="⋮"/>

Example for Physical One Time POL

- The POL goes to the Claims Task List

Claim (1 - 1 of 1) Back Change Expected Date

Select All All roman women their history Q Expand 📄 ⚙️

1 <input type="checkbox"/>		Roman women: their history and habits., London,, Bodley Head, [1962],	Edit Change Expected Date ⋮
	MMC ID: 99203311300121	Copies: Main Library - General (1)	Receiving note: -
	Assigned to: -	Total price: 20.00 EUR	Sent date: 20/08/2019
	Type: Physical - One Time	Funds: Library and Information Science (100.0%) (01/01/2019 - 31/12/2019)	The bib record is brief, Open claims exist for this PO line, 0 Items were received out of 1 ordered, Overdue PO line
	PO line owner: Main Library	Vendor/Account: E Zafrani Physical and Electronic Resources Ltd. / Zafrani Physical and Electronic Resources Ltd. Main Account ZERMAIN	Reporting code: Book
	Standard number: -	Vendor reference ID: -	Secondary reporting code: Computer Sciences
	PO: PO-107113	Expected delivery: 01/07/2019	Tertiary reporting code: Users request
	PO line: POL-45453 / (Sent)		

Physical One Time (1) One Time Claiming Information (1)

Example for Physical One Time POL

- The claim letter arrives with title and POL number in the subject
- This appears in the inbox

Order Claim - Title : Roman women: their history and habits., Order Number: POL-45453 - Claim 20...

6:04 PM

Example for Physical One Time POL

- And here is the subject in the letter

Order Claim - Title : Roman women: their history and habits., Order Number: POL-45453 Inbox x



 **thelibrary613@gmail.com** via [exlibrisgroup.com](#)
to me ▾

6:04 PM (4 minutes ago) ☆ ↶ ⋮



Claim

20/08/2019

E Zafrani Physical and Electronic Resources Ltd.

Main Library
Primary Dept. 237 Center Street Main Library
237 Center Street Main Library 2nd Floor
Centreville

Dear Sir/Madam

Attached information regarding items that have been ordered but not received.
Please supply the required item/s or advise.



THANK YOU!

