



Ability to add or replace funds for multiple invoice lines

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- Adding or replacing funds for selected invoice lines



Introduction

Introduction

- As of the March 2019 release of Alma it is possible to add or replace funds for multiple invoice lines of an invoice in batch mode.
- This automation process is a great time saver for the acquisitions staff.
- Instead of needing to edit multiple invoice lines separately and one at a time, multiple invoice lines can be selected and updated all at once.



Adding or replacing funds for multiple invoice lines

Adding or replacing funds for selected invoice lines

- On the next slide we see invoice PO-101913
- It has three invoice lines:
 - 2 with fund "Library and Information Science"
 - 1 with fund "Accounting and Finance E-resources"
- We will click "Add / Replace Selected Fund" and change all three invoice lines to have fund "Gender Studies"

Adding or replacing funds for selected invoice lines

Invoice Details

Summary Alerts **Invoice Lines** History Notes Attachments

1 - 3 of 3

Status: All Type: All

Add / Replace Selected Fund Save Cancel Save and Continue

Add/Replace Selected Fund Add Invoice Line

Invoice Lines Tab

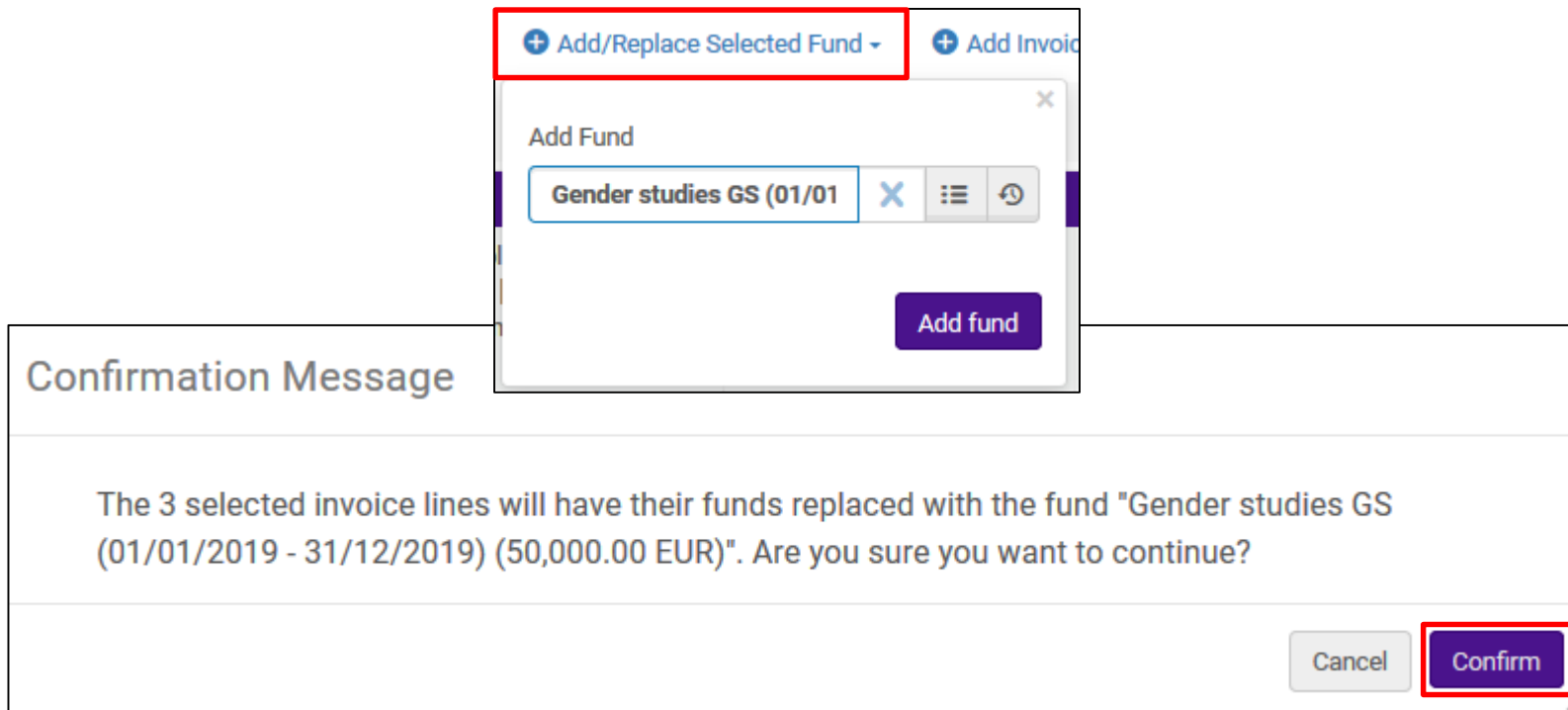
<input checked="" type="checkbox"/>	Type	Total Price	Status	Description	Funds	PO Line #
<input checked="" type="checkbox"/>	Regular	613.00 EUR	Ready	A vindication of the rights of woman / Mary Wollstonecraft, edited and with an introduction by Eileen Hunt Botting [editor] ; with essays by Ruth Abbey, Eileen Hunt Botting, Norma Clarke, Madeline Cronin, and Virginia Sapiro.	Library and Information Science LIS (100.0%) (01/01/2019 - 31/12/2019)	POL-45319 (Waiting for Invoice)/
<input checked="" type="checkbox"/>	Regular	10.00 EUR	Ready	The mystery of Easter Island; the story of an expedition, by Mrs. Scoresby Routledge ...	Accounting and Finance E-resources LEDGER1003-10-10 (100.0%) (01/01/2019 - 31/12/2019)	POL-45316 (Waiting for Invoice)/
<input checked="" type="checkbox"/>	Regular	15.00 EUR	Ready	Women Working, 1800-1930 An exploration of women's impact on the economic life of the United States between 1800 and the Great Depression	Library and Information Science LIS (100.0%) (01/01/2019 - 31/12/2019)	POL-45318 (Waiting for Invoice)/

Select relevant lines

The current funds

Adding or replacing funds for selected invoice lines

- Select fund and confirm



The screenshot shows a confirmation dialog box with the following elements:

- A red box highlights the button labeled "+ Add/Replace Selected Fund" at the top left of the dialog.
- The dialog title is "Add Fund".
- A text input field contains "Gender studies GS (01/01)".
- Buttons for "Add fund" (purple), "Cancel" (grey), and "Confirm" (purple) are visible.
- The "Confirm" button is highlighted with a red box.

Confirmation Message

The 3 selected invoice lines will have their funds replaced with the fund "Gender studies GS (01/01/2019 - 31/12/2019) (50,000.00 EUR)". Are you sure you want to continue?

Adding or replacing funds for selected invoice lines

< Invoice Details

Save

Cancel

Save and Continue

Summary

Alerts

Invoice Lines

History

Notes

Attachments

1 - 3 of 3

+ Add/Replace Selected Fund -

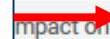
+ Add Invoice Line



Status : All Type : All

	<input type="checkbox"/>	Type	Total Price	Status	Description	Funds	PO Line #	
1	<input type="checkbox"/>	Regular	613.00 EUR	In-Review	A vindication of the rights of woman / Mary Wollstonecraft, edited and with an introduction by Eileen Hunt Botting [editor] ; with essays by Ruth Abbey, Eileen Hunt Botting, Norma Clarke, Madeline Cronin, and Virginia Sapiro.	Gender studies GS (100.0%) (01/01/2019 - 31/12/2019)	POL-45319 (Waiting for Invoice)/	...
2	<input type="checkbox"/>	Regular	10.00 EUR	In-Review	The mystery of Easter Island; the story of an expedition, by Mrs. Scoresby Routledge ...	Gender studies GS (100.0%) (01/01/2019 - 31/12/2019)	POL-45316 (Waiting for Invoice)/	...
3	<input type="checkbox"/>	Regular	15.00 EUR	In-Review	Impact on the economic life of the United States between 1900 and the Great Depression	Gender studies GS (100.0%) (01/01/2019 - 31/12/2019)	POL-45318 (Waiting for Invoice)/	...

The new fund in all invoice lines



Adding or replacing funds for selected invoice lines

- Now we will do the process on invoice lines with no fund

Summary Alerts Invoice Lines History Notes Attachments

1 - 5 of 5 + Add/Replace Selected Fund + Add Invoice Line

Status: All Type: All

<input type="checkbox"/>	Type	Total Price	Status	Description	Funds	PO Line #	
1	<input type="checkbox"/> Regular	613.00 EUR	In-Review	A vindication of the rights of woman / Mary Wollstonecraft, edited and with an introduction by Eileen Hunt Botting [editor] ; with essays by Ruth Abbey, Eileen Hunt Botting, Norma Clarke, Madeline Cronin, and Virginia Sapiro.	Gender studies GS (100.0%) (01/01/2019 - 31/12/2019)	POL-45319 (Waiting for Invoice)/	...
2	<input type="checkbox"/> Regular	10.00 EUR	In-Review	The mystery of Easter Island: the story of an expedition by Mrs. Scoresby	Gender studies GS (100.0%) (01/01/2019 - 31/12/2019)	POL-45316 (Waiting for Invoice)/	...
3	<input type="checkbox"/> Regular	15.00 EUR	In-Review	Women Working, 1800-1930 An exploration of women's impact on the economic life of the United States between 1800 and the Great Depression	Gender studies GS (100.0%) (01/01/2019 - 31/12/2019)	POL-45318 (Waiting for Invoice)/	...
4	<input type="checkbox"/> Shipment	10.00 EUR	In-Review	Shipment	-	-	...
5	<input type="checkbox"/> Overhead	6.13 EUR	In-Review	Overhead	-	-	...

The fund is empty in these invoice lines

Adding or replacing funds for selected invoice lines

- Select the invoice lines and choose "Add/Replace Selected Funds"

1 - 5 of 5

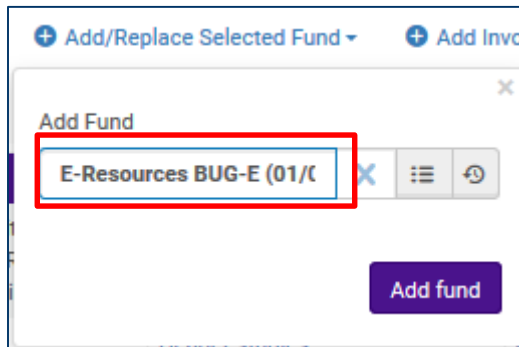
Status: All Type: All

[+ Add/Replace Selected Fund](#) [+ Add Invoice Line](#)

	<input type="checkbox"/>	Type	Total Price	Status	Description	Funds	PO Line #	
1	<input type="checkbox"/>	Regular	613.00 EUR	In-Review	A vindication of the rights of woman / Mary Wollstonecraft, edited and with an introduction by Eileen Hunt Botting [editor] ; with essays by Ruth Abbey, Eileen Hunt Botting, Norma Clarke, Madeline Cronin, and Virginia Sapiro.	Gender studies GS (100.0%) (01/01/2019 - 31/12/2019)	POL-45319 (Waiting for Invoice)/	...
2	<input type="checkbox"/>	Regular	10.00 EUR	In-Review	The mystery of Easter Island; the story of an expedition, by Mrs. Scoresby Routledge ...	Gender studies GS (100.0%) (01/01/2019 - 31/12/2019)	POL-45316 (Waiting for Invoice)/	...
3	<input type="checkbox"/>	Regular	15.00 EUR	In-Review	Women Working, 1800-1930 An exploration of women's impact on the economic life of the United States between 1800 and the Great Depression	Gender studies GS (100.0%) (01/01/2019 - 31/12/2019)	POL-45318 (Waiting for Invoice)/	...
4	<input checked="" type="checkbox"/>	Shipment	10.00 EUR	In-Review	Shipment	-	-	...
5	<input checked="" type="checkbox"/>	Overhead	6.13 EUR	In-Review	Overhead	-	-	...

Adding or replacing funds for selected invoice lines

- Here we have selected fund "E-Resources" and confirmed



Confirmation Message

The 2 selected invoice lines will have their funds replaced with the fund "E-Resources BUG-E (01/01/2019 - 31/12/2019) (40,000.00 EUR)". Are you sure you want to continue?

Cancel

Confirm

Adding or replacing funds for selected invoice lines

- Where formerly there was no fund there is now fund "E-Resources"

1 - 5 of 5

+ Add/Replace Selected Fund ▾

+ Add Invoice Line



▼ Status : All ▾ Type : All ▾

<input type="checkbox"/>	↕ Type	↕ Total Price	↕ Status	Description	Funds	PO Line #	
1	<input type="checkbox"/> Regular	613.00 EUR	In-Review	A vindication of the rights of woman / Mary Wollstonecraft, edited and with an introduction by Eileen Hunt Botting [editor] ; with essays by Ruth Abbey, Eileen Hunt Botting, Norma Clarke, Madeline Cronin, and Virginia Sapiro.	Gender studies GS (100.0%) (01/01/2019 - 31/12/2019)	POL-45319 (Waiting for Invoice)/	...
2	<input type="checkbox"/> Regular	10.00 EUR	In-Review	The mystery of Easter Island; the story of an expedition, by Mrs. Scoresby Routledge ...	Gender studies GS (100.0%) (01/01/2019 - 31/12/2019)	POL-45316 (Waiting for Invoice)/	...
3	<input type="checkbox"/> Regular	15.00 EUR	In-Review	Women Working, 1800-1930 An exploration of women's impact on the economic life of the United States between 1800 and the Great Depression	Gender studies GS (100.0%) (01/01/2019 - 31/12/2019)	POL-45318 (Waiting for Invoice)/	...
4	<input type="checkbox"/> Shipment	10.00 EUR	In-Review	Shipment	E-Resources BUG-E (100.0%) (01/01/2019 - 31/12/2019)	-	...
5	<input type="checkbox"/> Overhead	6.13 EUR	In-Review	Overhead	E-Resources BUG-E (100.0%) (01/01/2019 - 31/12/2019)	-	...



THANK YOU!

