



FOLIO Acquisitions Overview

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Acquisitions Applications



Organizations



Orders



Receiving



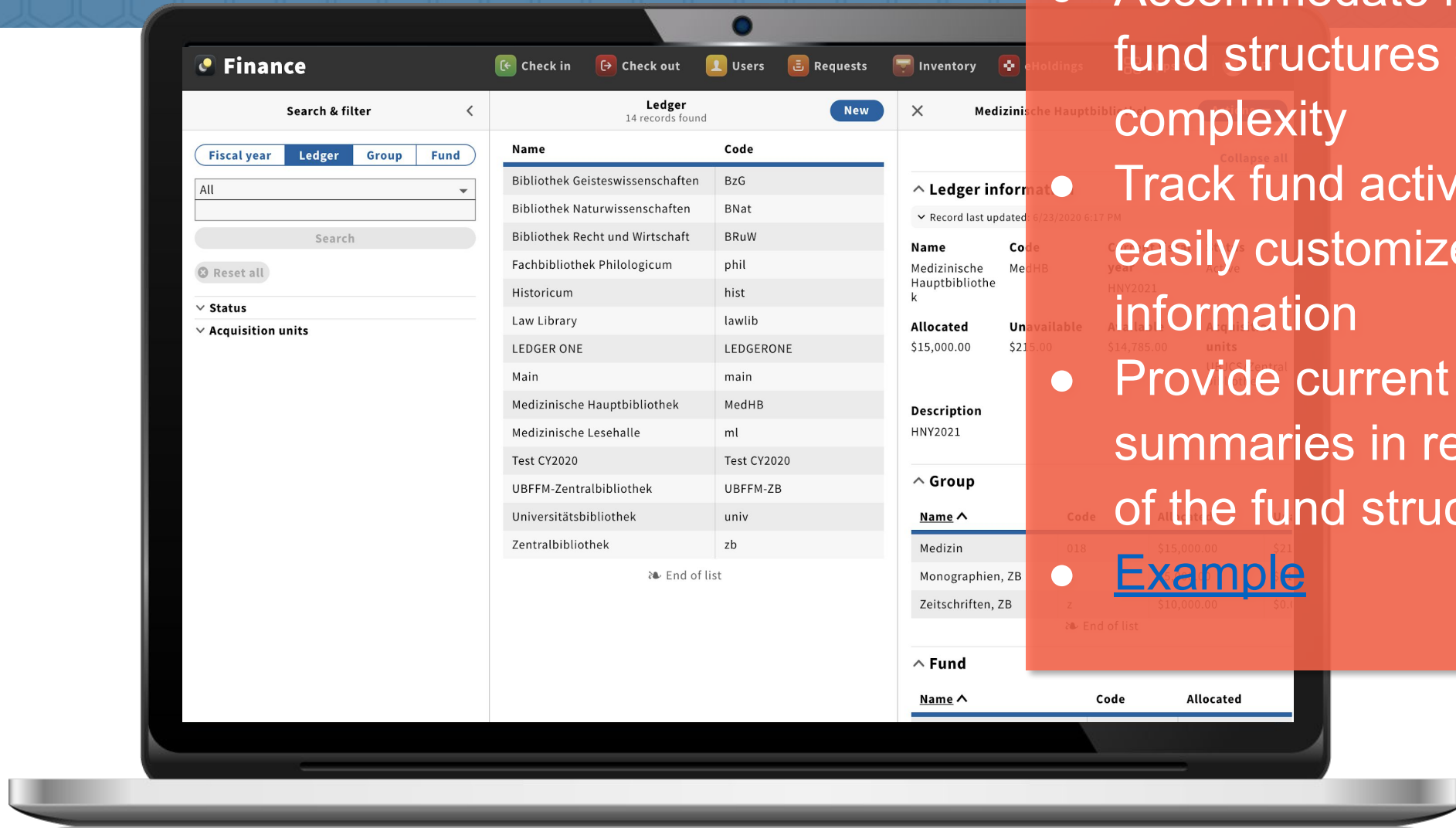
Finances



Invoices

- What we are referring to as “Acquisitions” is made up of 5 separate Apps
- Each are intended to function independently of each other but will interact in order to enhance user experience

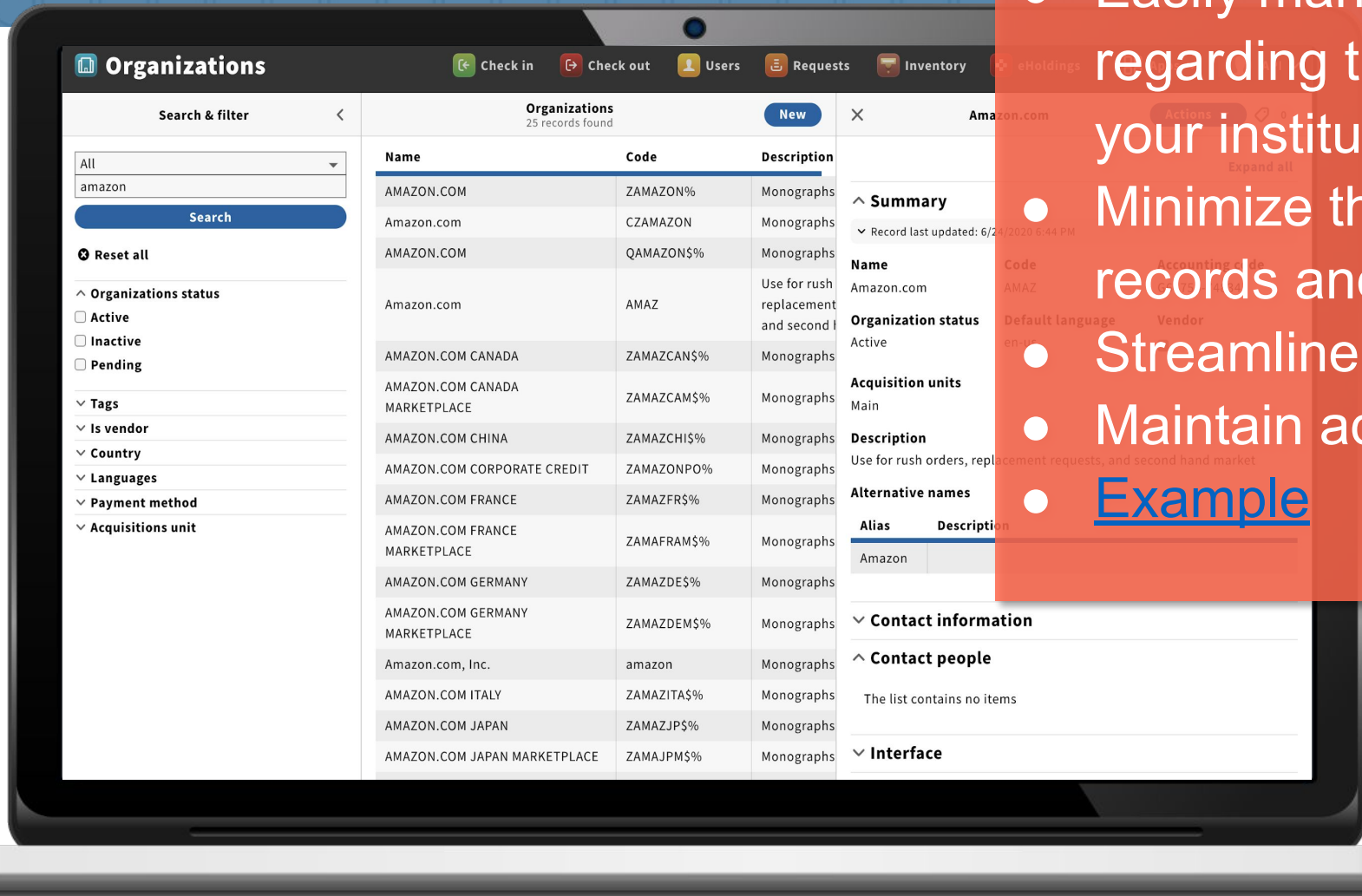
Finances



- Accommodate hierarchical and flat fund structures of varying complexity
- Track fund activity in detail and easily customize summary information
- Provide current and historical summaries in real-time at all levels of the fund structure

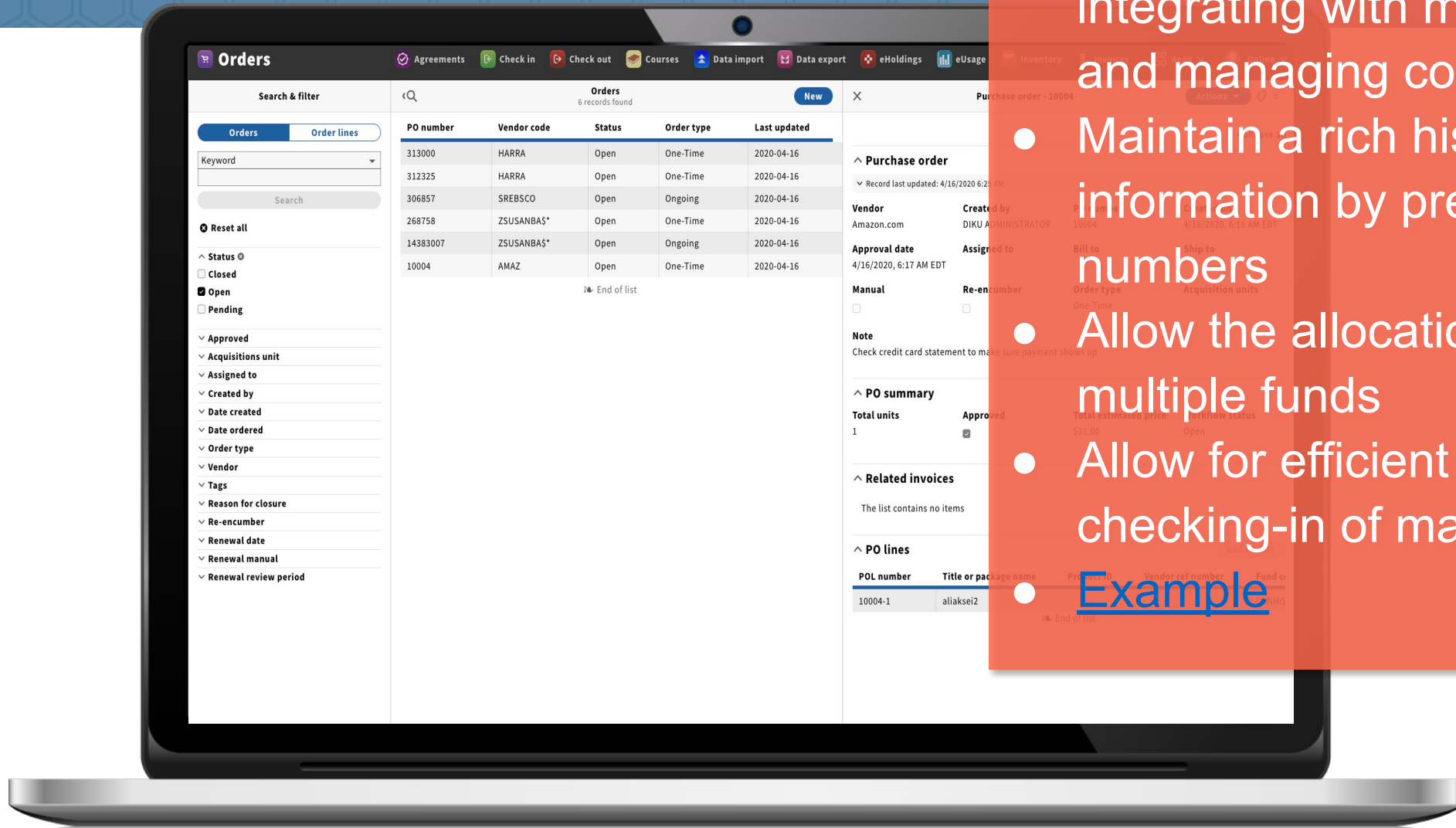
Example

Organizations



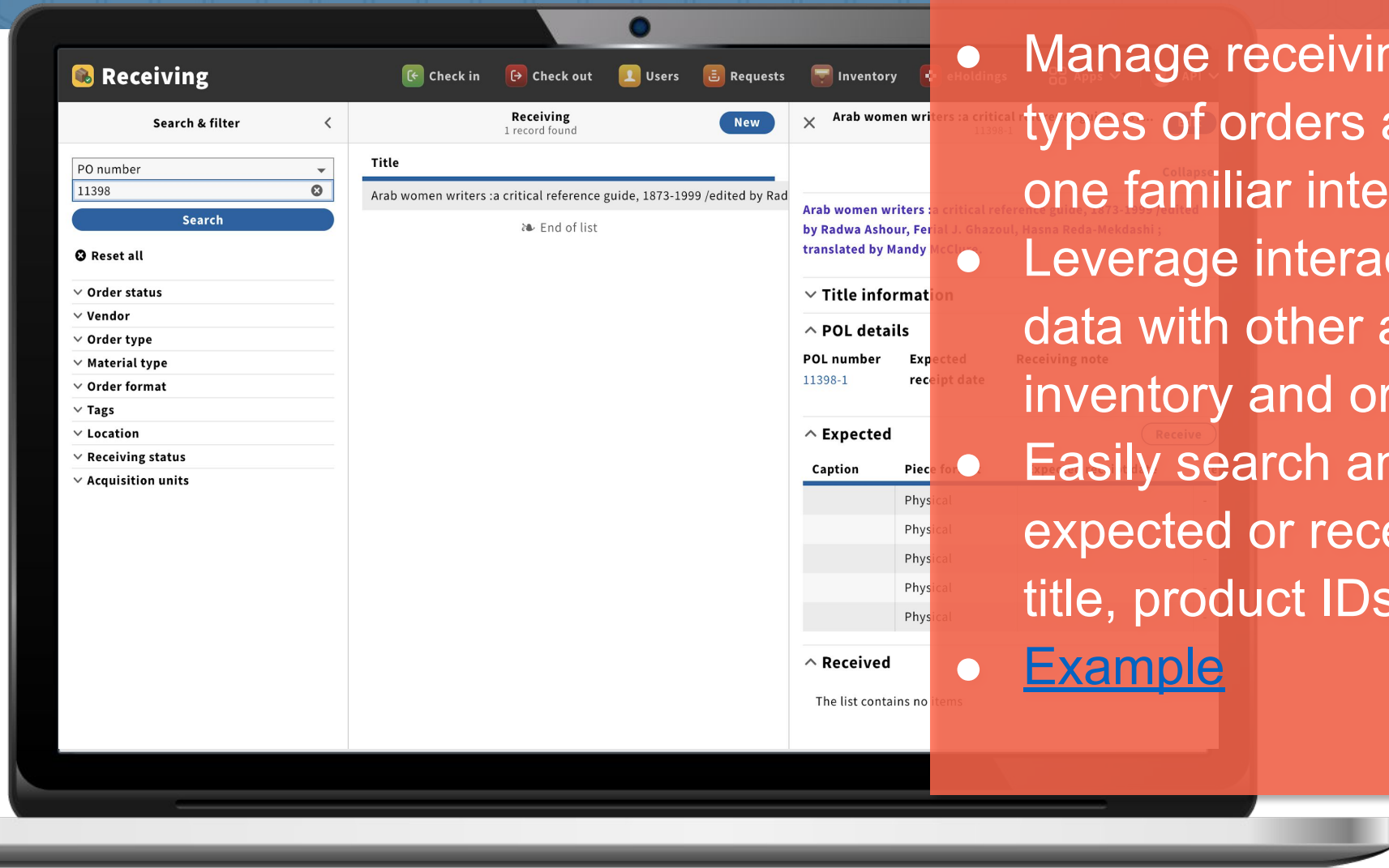
- Easily manage information regarding the organizations that your institution interacts with
- Minimize the duplication of records and data
- Streamline ordering and invoicing
- Maintain admin details
- [Example](#)

Orders



- Create a flexible order structure for integrating with multiple systems and managing complex orders
- Maintain a rich history of order information by preserving order numbers
- Allow the allocation of costs across multiple funds
- Allow for efficient receiving and checking-in of materials
- Example

Receiving



- Manage receiving for different types of orders and materials in one familiar interface
- Leverage interactions that sync data with other apps like requests, inventory and orders
- Easily search and identify expected or received material by title, product IDs and more
- [Example](#)

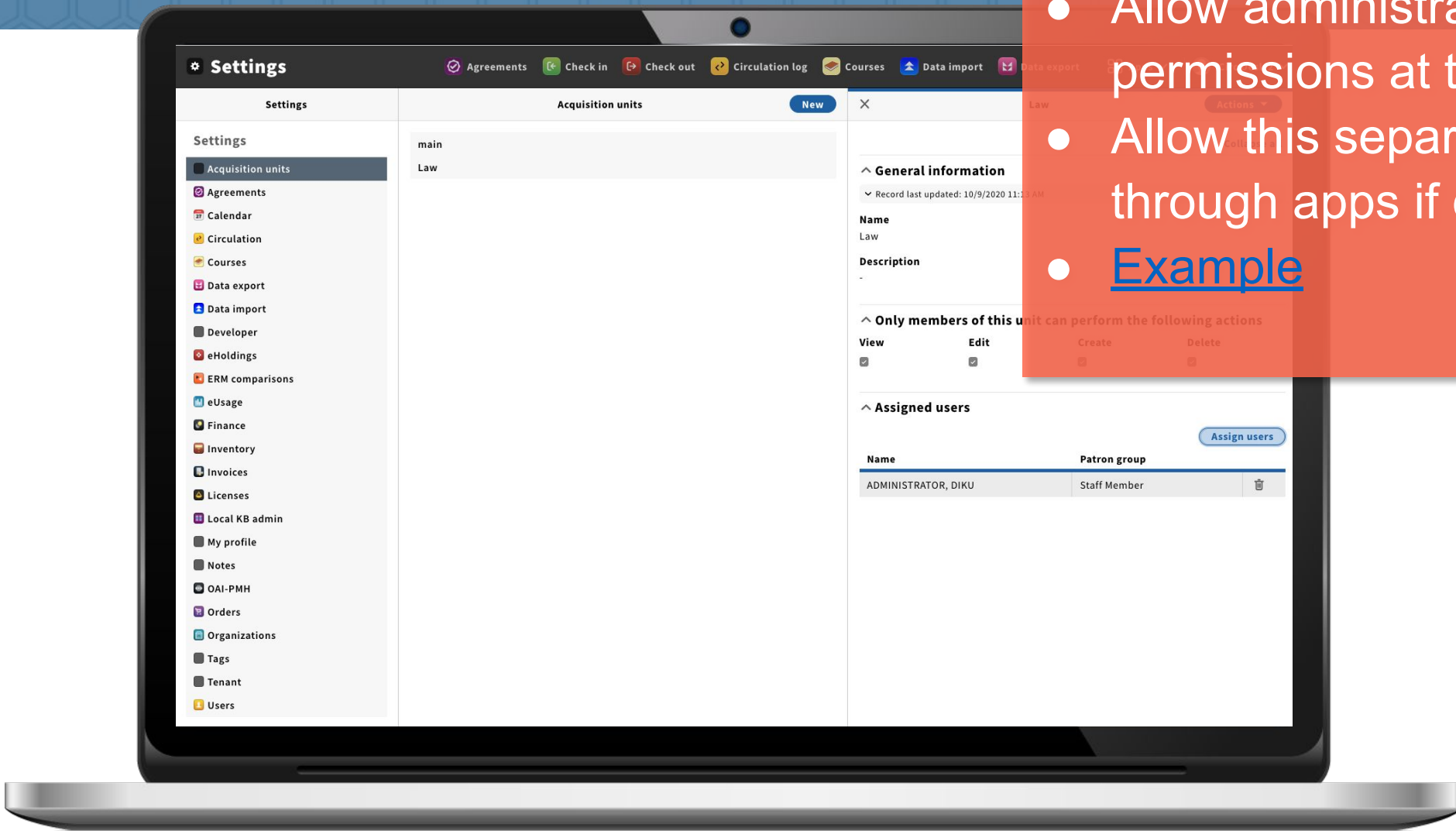
Invoices

Vendor invoice number	Vendor	Invoice date	Status	Total amount (system)
YK75852	Otto Harrassowitz GmbH & Co. KG	2018-07-27	Reviewed	\$2,100.00
DU10938	United States Geological Survey	2018-07-20	Cancelled	\$375.00
JS1763	Susan Bach Books (Brazil)	2018-07-27	Open	\$1,000.00
LS9834	Susan Bach Books (Brazil)	2018-07-01	Paid	\$352.00
AD14125	Jean Simmons	2014-07-14	Paid	\$1,000.00
YK75851	Otto Harrassowitz GmbH & Co. KG	2018-07-25	Approved	\$1,195.00
NM23141	American Chemical Society	2018-07-25	Paid	\$1,000.00
34523423456	EBSCO SUBSCRIPTION SERVICES	2020-05-06	Open	-\$60.00

- Easily manage a workflow of creating, approving and paying invoices
- Capture detailed cost information and adjustments
- Customize communication with AP system
- Upload electronic copies to FOLIO invoice to simplify auditing
- [Example](#)

Acquisition Units

- Allow administrators to separate permissions at the record level
- Allow this separation to carry through apps if desired
- [Example](#)





Questions