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# Tracking Toolkit

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VERSION 2.0  
MARCH 2021

**Requirements**

**Workflows**

**Tools**

## ACKNOWLEDGEMENTS

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*Alpine County Library*

*Amador County Library*

*Beaumont Library District*

*Brawley Public Library*

*Camarena Memorial Public Library*

*Corona Public Library*

*Goleta Valley Library*

*Humboldt County Library*

*Imperial Public Library*

*Kern County Library*

*Kings County Library*

*Lake County Library*

*Mendocino County Library*

*Merced County Library*

*Modoc County Library*

*Mono County Library*

*Ontario City Library*

*Pacific Grove Public Library*

*Palo Verde Valley Library District*

*Plumas County Library*

*Redwood City Public Library*

*Riverside Public Library*

*Sacramento Public Library*

*Salinas Public Library*

*San Luis Obispo City – County Library*

*Santa Barbara Public Library*

*Siskiyou County Library*

*Torrance Public Library*

*Yolo County Library*

***Zip Books is a partnership between the California State Library and the NorthNet Library System. The opinions expressed herein do not necessarily reflect the position or policy of the State Library. The program is supported in whole or in part with California Library Services Act funds and administered by the California State Librarian.***

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# INTRODUCTION

## What is the Zip Books project?

*The Zip Books project is an alternative model for interlibrary loan service that bridges the gaps between a library's patron request service, a normal acquisitions process, and an outreach/home delivery service.*

It is based on the pilot project, "Zip Books—Digital Library of Northern California," conducted by the Butte, Shasta and Humboldt County Libraries under a FY 2011/12 LSTA grant from the California State Library. The purpose was to identify and test efficient, cost-effective alternatives to traditional interlibrary loan delivery practices. One method tested was a "buy vs. borrow" model, where used books were ordered through Amazon, rather than requested through interlibrary loan, and shipped directly to patrons in good standing using the free Amazon Prime two-day delivery service whenever possible. Services were tracked, and the patrons were responsible for returning the books to the library when finished. The libraries would then decide whether to add the books to their collections or dispose of them in some other way (offering it to other Zip libraries, library book sale, etc.).

Zip Books is extremely popular with both libraries and patrons. It provides patrons with speedy access to materials they might not otherwise be able to get through the library, without the long wait often associated with traditional Interlibrary Loan (ILL) requests and local resource sharing systems like Link+. It is easy for library staff to administer. And since Amazon ships materials directly to the patron, it saves the effort and cost of packaging and mailing materials, or the need to require patrons to return to the library to pick up their requested materials. It adds a patron-driven collection development approach to a library's usual process, resulting in a collection more closely attuned to the needs of the local community. And it exposes library staff to patrons and materials they might not otherwise encounter, improving their ability to market library services and serve their communities.

### Program Contacts

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Grant Monitor:	Rebecca L. Wendt, Deputy State Librarian 916-651-6814 rebecca.wendt@library.ca.gov

## What is the Tracking Toolkit?

*The Tracking Toolkit is a resource designed to assist participating libraries in determining the best practices for tracking their Zip Books program expenditures, statistics, item requests, and additional information needed to successfully run their local programs.*

The toolkit is organized into five sections: introduction, tracking requirements, tracking workflows, tracking tools, and supporting documents. Recommendations and best practices are shared throughout the toolkit. While every effort has been made to cover all the possible data points that should be tracked, local programs may need to track additional facets depending on their own needs, program procedures, and Fiscal requirements. What is presented here is a general overview, but library staff should also refer to their own internal program documentation.



Photo courtesy of Christian Koszka, FreeTime Productions



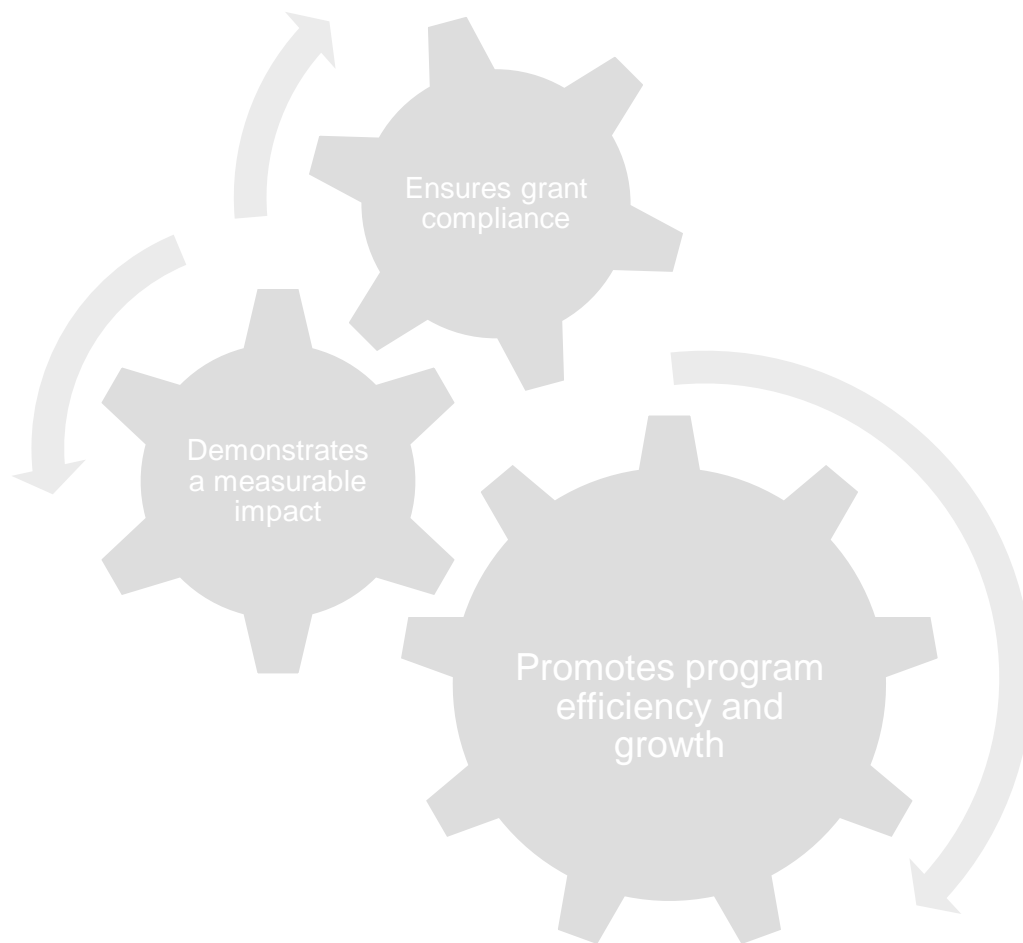
Photo courtesy of Christian Koszka, FreeTime Productions

Portions of this toolkit were pulled from the Onboarding Toolkit, Best Practices Toolkit, and End Processing Toolkit, and expanded with input from the State Library, the Zip Books Advisory Committee, the Zip Books Fiscal Department, and library staff from various participating Zip Books libraries.

This toolkit was created with the overall goal of making Zip Books a more efficient and sustainable program. Additional information and resources can be found on the Zip Books website at: <https://northnetlibs.org/zip-books/>. The Zip Books Project Coordinator is always available to assist and provide guidance, if needed.

## The importance of good program tracking

*How well a library tracks their Zip Books items requests, expenditures, statistics, and other useful points of data can mean the difference between a widely successful Zip Books program and a program that struggles to get its feet off the ground. Good tracking not only helps to make a program more efficient, saving staff time and labor, but it also ensures that Zip Books continues to be an easy-to-use service that provides patrons with a satisfying library experience. This in turn creates repeat users that help to spread the word about Zip Books, while also adding items of interest to your library collection.*





# TRACKING REQUIREMENTS

## By Usage

This following section discusses the various tracking requirements for every Zip Books program, whether big or small. Additional facets may be tracked depending on each program's needs and procedures.

### For NLS and State Library

- Expenditures
- Running total of Zip Books users
- # of items added to library collections
- If using local library funds:
  - *Amount supplemented*
  - *# of items ordered*
  - *# of items added*

### For Internal Records

- Zip requests
  - *Status of request*
  - *Item details*
- Limits
  - *Items per month*
  - *Items per household*
  - *Expenditure caps*
- Zip returns
  - *Due Dates*
  - *Adds/Discards*
- Patron communications
- Patron notes
  - *Lost/Undelivered items*
  - *Issues*

### For Optional Use

- Circulation info
- Total requests received
  - *Ordered*
  - *Denied*
- Item formats
  - *Regular print*
  - *Large print*
  - *Audiobook*
- Item genres
  - *Adult Fiction/Non-fiction*
  - *Young Adult/Children's Fiction/Non-fiction*
  - *Non-English language items*
- Staff time

# TRACKING REQUIREMENTS FOR NLS AND THE STATE LIBRARY

## Expenditures (ongoing)

To ensure that programs are staying within their allotted funds, it is important that Zip Books expenditures be tracked by library staff on an ongoing basis. In fact, this is one of the things libraries commit to doing when signing their Zip Books Participant Letter of Commitment as indicated by item 4 in **Attachment A** of the Supporting Documents section. Although NorthNet's Fiscal Department monitors overall program spending, it is still good practice for your library to review your own spending regularly, whether weekly, monthly or quarterly. This is especially useful if you wish to have the most accurate, up-to-date spending numbers. Due to the invoicing procedures of the project, Fiscal staff can only track balances using the monthly invoices and Order History reports received. This will not include any orders your library placed since the last day of the invoice billing cycle, and may be inaccurate if there are any missing invoices or reports.

A sample workflow for tracking expenditures on an ongoing basis, including suggested best practices, is shown in the Tracking Workflows section. How your individual program is structured will determine whether or not expenditures will be directly tracked by Zip Books staff or by someone in your library's Finance Department. No matter the procedures used, it is useful for all staff members involved in your program to have a way to quickly and easily find out the amount of remaining funds available to them. This will help to prevent any accidental overspending of your Zip Books allocation.

Depending on the payment method used, program expenditures can be tracked using the following tools. A brief overview is provided here, but an in-depth discussion of how to utilize these tools is provided in the Tracking Tools section of the toolkit:

- Internal Zip Books tracking tool
- Monthly Amazon statements
- Order History reports
- Order Details
- Online Credit Line account

If your Zip Books tracking tool has the capability, you could use it to continuously track your spending. For example, if you are using an Excel spreadsheet as your tracking tool, formulas can be built into your spreadsheet to automatically deduct expenditures from your allocation balance

as each request is inputted and processed. This is shown in **Attachment D** of the Supporting Documents section, as well as in the two tracking templates shared on our Zip Books website at: <https://northnetlibs.org/policies-and-best-practices/>.

If you are not using an Excel spreadsheet, you can also review the monthly statements sent to you from Amazon and/or generate your own Order History reports to help you determine your spending rate. If you are already doing this, you may have noticed that sometimes the total cost for an order may be reported differently in the invoice than in the Order History report. This is because the shipping costs for certain orders, such as Used items ordered from some third-party vendors, is not always included in the Order History reports, possibly because of the different processing times or due to changes in shipping costs. You can use your invoices to confirm the actual amount charged, check the Order Details on your Amazon account, or wait until all orders have shipped before generating another Order History report. Examples of what an Amazon Invoice, individual Order Details, and Order History report will look like can be found in **Attachment F and G**.

While some or all of these tools can be used directly by libraries to keep continuous track of their spending, the Zip Books Fiscal Department is also always available to help. Library staff are encouraged to reach out to the Zip Books Project Coordinator who will work with NorthNet's Fiscal Department to provide any fiscal information needed, such as questions regarding your funding availability or assistance confirming the total amount spent so far.

## Zip Books Users (monthly)

Besides tracking expenditures, participating libraries are also required to track certain statistical information on a regular basis in order to provide monthly data to the State Library, which helps to showcase the growth and value of the Zip Books program. Efforts have been made to keep statistics reporting to a minimum so there are only two questions that need to be reported each month. The first of these is the running total of first-time Zip Books customers served since the very first day that your program launched. This number is continuous and does not reset each fiscal year. And only first-time Zip Books users are tracked so that each person is counted once no matter the number of times they request items.

There are various ways in which libraries can keep track of the number of unique users. The easiest of these is to create a separate Excel spreadsheet or numbered Word document with just patron names. This allows you to filter names alphabetically or do a search to quickly determine if a patron is a first-time user or not. This document can also be used to help maintain your Amazon



address book should you need to purge any names. However, if your Zip Books tracking tool is adaptable, then it is just as easy to create a specific column for tracking first-time users.

While these statistics should not take too much of your staff's time to track, we recommend building these questions into your regular program tracking tool so that the information can be more easily gathered. This will not only save your staff time and effort by lessening the time spent on program reporting, but it also creates a one-stop-shop for all your Zip Books tracking needs, including requests, budgeting, and statistics.

A sample workflow for tracking statistics is shown in the Tracking Workflows section and an in-depth overview of your internal tracking tool can be found in the Tracking Tools section.

For complete instructions on statistics tracking and reporting, review the "Zip Books Statistics Reporting Procedures" document and forms included in the Supporting Documents section as **Attachment K and L** or available on the Zip Books website at:  
<https://northnetlibs.org/statistics-reporting/>.



Photo courtesy of Christian Koszka, FreeTime Productions

## Items Added (monthly)

Along with tracking your running total of first-time Zip Books users, libraries are also asked to track the number of returned Zip Books items that are added to your library collection each month. This includes any Zip Books discards that you may have requested and received from another library. While this is reported each month along with your running total of users, keep in mind that this statistic resets each month and is tracked from the 1<sup>st</sup> of the month to the last day of the month.

Depending on the available staffing, staff time, and your end processing procedures, the number of items added will fluctuate throughout the year. Other factors, such as the COVID-19 pandemic and library closures, can also affect this statistic. Nevertheless, it is still important that libraries remember to follow-up with patrons regarding outstanding requests, and that data on the total number of items added continue to be reported to the State Library.

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## Local Library Funded Statistics (as needed)

Occasionally, participating libraries may choose to supplement their Zip Books program with local library funds. Although it is not a requirement of the grant that libraries report supplemental funding, it is still useful to know. Not only is this information tracked by NorthNet's Fiscal Department, but it is also shared with the State Library in the monthly updates and grant reporting. Knowing the popularity of Zip Books and seeing how libraries are willing to invest in their local programs in order to continuously provide this service to their patrons is just another way to demonstrate the impact Zip Books has on libraries and their communities.

A separate tab is provided in the monthly statistics reporting form for libraries to report any local library funded statistics. This includes the number of Zip Books items ordered using supplemental funds that month, the number of items added, and the total amount of funds spent. Libraries are not required to provide any invoicing for items purchased with local funds. Also, although space is left for libraries to report their number of Zip Books users, this does not have to be tracked separately. Instead, the running total of users should be the same as it is for the regular grant funded statistics. For further instructions on how to report this data, see ***Attachment K***.

## TRACKING REQUIREMENTS FOR INTERNAL RECORDS

### Zip Requests (ongoing)

To aid in the organization and efficiency of your local Zip Books program, it is very important for libraries to track all the requests received. This not only includes those requests that you fulfill, but also those that you choose not to fulfill for whatever reason. Having a set process and tool for tracking Zip Books requests helps to ensure that requests are processed in a timely manner, and provides a reference place should patrons or staff have any questions about past or pending requests. Many libraries create an Excel spreadsheet to use as their internal tracking tool to track requests, expenditures, statistics, and more. However, other libraries have utilized Google Sheets, SharePoint, and even Microsoft Access. For more information about the internal tracking tool, refer to the Tracking Tools section of the toolkit.

No matter the platform or look of your internal tracking tool, the information tracked will generally be the same. For each Zip Books request received you will want to track the following:

- Patron information (name, address, library card number)
- Item requesting (title, author, ISBN, cost)
- Status of request (fulfilled, pending, denied)
- Status of item (ordered, returned, added, discarded)

In addition, libraries may choose to track other facets such as item format, item genre, and other useful notes, such as when a request is undelivered, reordered, or returned damaged. Zip Books requests are tracked on an ongoing basis, but libraries may choose to reset or start a new sheet in your tracking tool for each new fiscal year. This is especially useful if your library has participated in Zip Books for a long time or if you process a large number of requests each year.

A sample workflow for tracking requests is shown in the Tracking Workflows section, as well as in **Attachment M**. Both demonstrate the various checks that staff must make before a request can be approved. Lake County Library's "Zip Books Flowchart" also clarifies which system or tool is utilized during each stage of the request process.

### Limits (monthly)

The "Zip Books Purchasing Policies", available in the Supporting Documents section as **Attachment B**, states that libraries should monitor the number of Zip Books requested by a



patron at any one time and may determine the maximum number, with a maximum allowable of five items per customer per month. Furthermore, libraries may choose to allow patrons their maximum allowable items all at once or limit them to one item at a time.

To ensure that program funding remains available for use by multiple users, libraries will want to track the number of requests submitted by a patron each month and only process those that fall within their allotted limit. While it is good practice to keep item limits consistent, occasionally you may need to adjust them due to funding, program usage, or even expanded parameters. So staff will need to be kept informed and adjustments made to ensure limits are being met each month.

In addition to item limits, there are also expenditure caps to keep in mind. The expenditure cap for individual items has been set by NorthNet and the State Library at \$75 pre-tax for audiobooks and foreign-language items, and \$50 pre-tax for all other eligible Zip Books items. This raised cap has allowed for more titles to be eligible for purchase through the program, and many libraries have cited this policy change as one of the main reasons for their program growth. Staff should make sure that requests meet these expenditure caps or request an exemption from the Zip Books Project Coordinator in order to purchase the item.

For larger programs or special situations in which you find you have “power users” living under one house, libraries may also choose to set a monthly limit for households. Riverside Public Library established a \$200 monthly limit per household, which impacted a handful of large families that had multiple members requesting their maximum number of items each month. Goleta Valley Library has taken a different approach by just setting a cap of five items per household per month. Both approaches have their pros and cons, and require a different level of tracking. Should your library find that setting a household limit may be necessary to ensure you have enough grant funds for the whole fiscal year, you will want to consider what limits are easiest to implement and track since you will be required to keep an eye on these limits each month. This will require some changes to staff procedures and updates to your internal tracking tool to help staff more easily track these various limits.



Photo courtesy of Christian Koszka, FreeTime Productions

## Zip Returns (ongoing)

In conjunction with tracking requests, library staff are also asked to track returns to determine if Zip Books items have been returned, if items are still out or outstanding, or if items are missing or damaged. This information should also be tracked using your internal tracking tool, especially the number of returned Zip Books that are then added to your library collection. Furthermore, if your library has set a limit on the number of “active” requests allowed at one time, such as only 1 or 2 requests at a time, then tracking returns will help staff know when requests should be processed or held until active requests are returned.

The process for tracking returns will differ depending on whether or not your library establishes a due date or time period for requests to be returned. If some sort of deadline is set, then staff will want to follow-up with patrons when items are not returned on time. For those libraries that check out Zip requests to patrons’ accounts, this can easily be done as part of your library’s normal process of sending email reminders for overdue books. For other libraries, it may be useful to create a “Zip Book Overdue Notice”, like the one created by Lake County Library (see **Attachment O**), which can be sent out to patrons by email or mail.

While it is possible for libraries to set no due date, thus allowing their patrons to utilize their request for as long as needed, this can result in items not being returned or a low number of items that can be added to your library collection. Therefore, it is recommended that some sort of deadline be established even if checking out items to a patron’s account is not a part of your normal request procedures. If your program does not set a due date, then establishing a timeline for following up with patrons is still suggested, such as 6 months from the initial request or at the end of each fiscal year.

## Patron Communications (ongoing)

Many patrons find it useful to know that their Zip Books request was received and processed so they can keep an eye out for their request in the mail. Some participating libraries will send emails notifying patrons of delivery dates, along with instructions on when the item is due and how to return it when done. However, even form messages notifying patrons that their request was received and providing them with an average processing time can be extremely helpful and much appreciated by patrons. Staff will often create an Amazon gift message for the patron when ordering the book and include information like the item barcode and return process. Besides following up with patrons at the beginning of the request process, you may also need to reach out to them at the end of the process when their Zip items are due or have been out for a long time. Not only will patrons welcome the reminder, but it may also help you catch items that may have incorrectly been returned through your library’s book drop. Moreover, it is always good

practice to notify patrons if there are any issues with their request, like if their request is denied, delayed, or was ordered through other means. Examples of patron communications are shared in the staff procedures shown in **Attachment N**, as well as the patron notifications shown in **Attachment O**.

If your program is large or you have a sizable base of Zip Books users, then you may be sending a large number of emails to patrons regarding their requests. This can be complicated if multiple Zip Books staff are involved with contacting patrons. Adding a column in your internal tracking tool specifically for tracking communications can be a quick and useful addition. Being able to track all communications to patrons will not only help to minimize confusion and keep things organized, but it will save staff time from having to search through emails and inboxes to find out if a specific patron had been notified or not. Likewise, putting one staff member in charge of all patron communications is another useful way to minimize confusion and streamline your overall Zip Books process.

## Patron Notes (ongoing)

Just as you would want to track all patron communications, being able to share and track notes about individual patrons can also be very helpful, especially if you have any “problem patrons” that staff will need to keep special eye on. Since it is also a requirement that patrons must be “in good standing” in order to request a Zip Books (see item 1 in **Attachment B**), you will want to add notes to your internal tracking tool or your integrated library system so that staff can quickly identify whether or not a patron is eligible to participate or if they have temporarily or permanently lost their good standing.

Besides patrons who have abused the program, you may also want to add notes regarding issues with patrons returning items properly or in good condition, or problems with deliveries being stolen or lost. Many libraries have a policy of allowing one first offense and reordering the requested item without issue. However, should it happen again with the same patron, staff are encouraged to arrange for future Zip Books requests to be delivered to a different address. For example, you might ask if there is another residence or a work address that you could ship to, or you could require that they pick up their requests from their local library branch. Keeping track of these instances can help staff to monitor for trends or identify repeat offenders, saving you folks time and money in the long run.



## TRACKING FOR OPTIONAL USE

### Circulation Information (ongoing)

On top of the data that needs to be tracked for NorthNet and the State Library, or for your own internal records, libraries may also want to track additional points of information for optional use. One that is highly recommended is tracking circulation information regarding Zip Books items. Many libraries will change the record type when importing bibliographic records for Zip Books items added to their library collection so that a quick search of their integrated library system will help them to identify all the Zip Books items in their catalog (see **Attachment N**). This is especially helpful if your library has added many Zip Books items or if you have multiple branches in your system. Tracking this circulation data can be helpful for:

- Creating Zip Books displays, such as “See what your local community is reading!”
- Tracking interlibrary loan data to see if Zip Books items are being sent outside of your system
- Acquisitions and collection development planning, such as identifying holes in your collection that Zip Books has been filling
- Gathering program statistics to share with library management, such as the total amount of items added over the years and the number of times those items have been checked out

### Total Requests Received (monthly)

In addition to monthly statistics and local library funded statistics, libraries are also asked to share supplemental statistics if this data is already being tracked by your library. While this data is optional, it is still useful to have as it can help libraries and program management to see where adjustments can be made to the program. For example, expenditure caps were raised when it was identified that requests were being denied because they did not meet the previously set cap of \$35.

One of optional supplemental statistics that can be tracked is the total number of requests received each month. This statistic used to be required for all libraries, but is now no longer needed. However, libraries may choose to still track this in order to see how many of the total requests received are actually processed. Knowing this could help libraries to clarify program policies more clearly so that patrons understand what items are eligible for request through the Zip Books program, which can save staff time and effort.

## Item Formats (ongoing)

Another optional supplemental statistic you may want to track is the format of the item requested, whether regular print, large print or audiobook. This may be useful in seeing where there may be gaps in your program marketing. For example, Redwood City Public Library created a special flyer to market Zip Books in their audiobook section since they found that many users did not realize that they could use Zip Books to request items in that format as well.

## Item Genres (ongoing)

The item genre is another optional statistic that some libraries continue to track for their information and usage. The statistics reporting form has these broken down to adult fiction/non-fiction, young adult and children's fiction/non-fiction, and non-English language items. However, libraries may track additional categories.

Just as with item formats, being able to see what genres are being requested and what genres are not can help libraries to adjust their marketing or look for new ways to bring more Zip Books users to the program. For example, libraries might encourage more families to use the program by asking the Children's Librarians to talk about Zip Books with parents at the reference desk or during Storytime. Likewise, you might find that you are getting a lot of requests for Adult and Children's items, but not very many Young Adult titles. This might tell you that you need to do more outreach to this age group and promote the service to the Teen clubs that your library hosts.

## Staff Time (monthly)

Staff time is another statistic that used to be tracked on a monthly basis, but is no longer required. However, if your program is growing or if you have multiple staff working on Zip Books, it may be useful to have them tracking the time they spend working on Zip Books, whether it is just processing requests or anything Zip Books related. This information may be useful in determining the staffing requirements for the program and help your library identify areas in the process that need to be streamlined.

# TRACKING WORKFLOWS

## Organized by Data Type

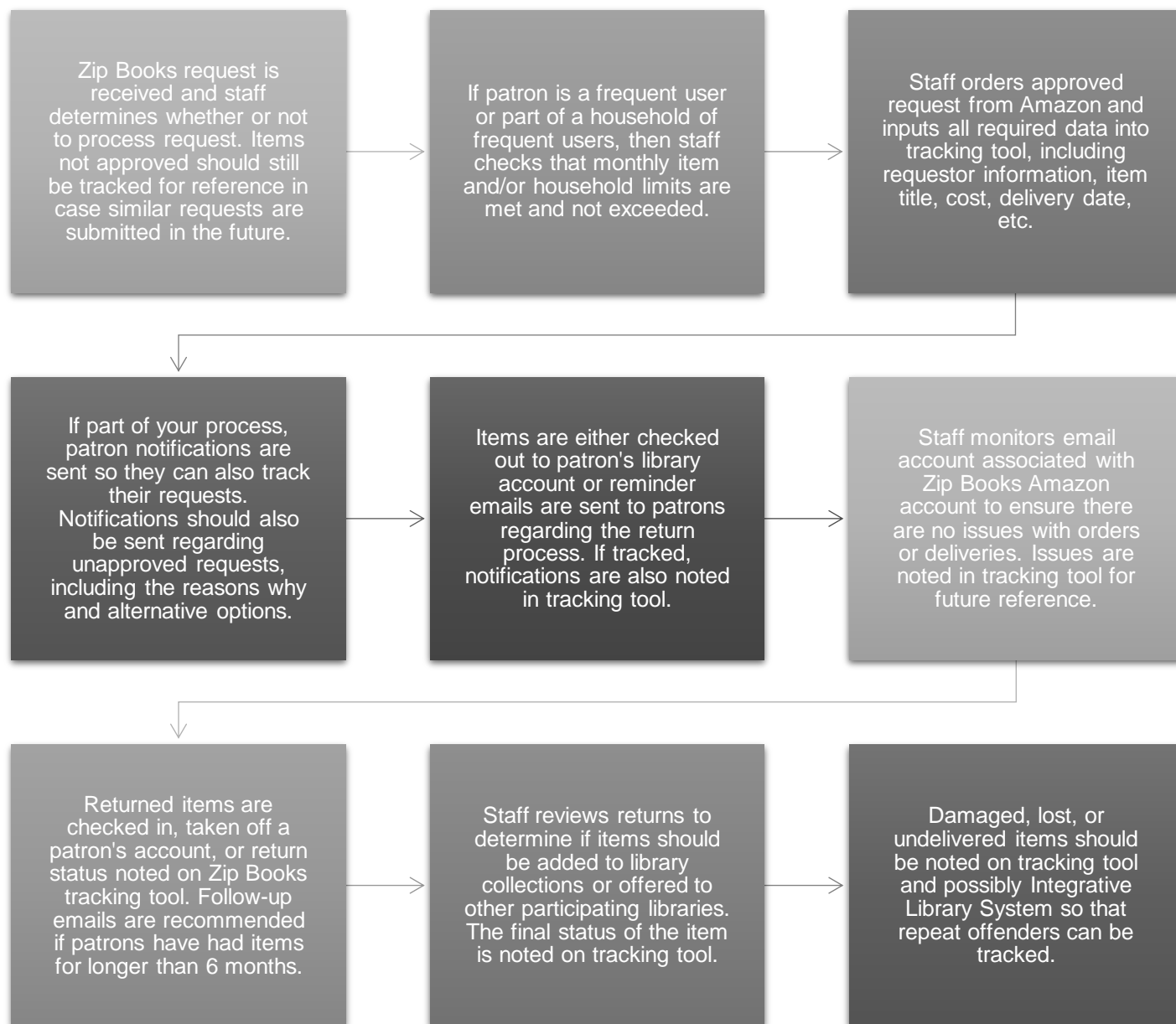
This following section demonstrates and discusses when different points of data are tracked and how. Workflows will vary for each individual Zip Books program depending on their own library needs and procedures.



Photo courtesy of Christian Koszka, FreeTime Productions

## TRACKING REQUESTS

*This workflow may differ depending on your library's own request processing procedures, but it gives a general idea of best practices for how and when Zip Books requests are tracked. If your library has multiple branches, then additional steps may be required to track requests coming from different locations.*



## Best Practices

- Your Zip Books tracking tool should serve as a one-stop for your program staff with all necessary information being tracked, including patron information, item information, request status (ordered/returned/denied/etc.), program spending, if item is added or shipped to another library, and other additional notes and comments. For reasons of convenience and accessibility, it is recommended that libraries create a digital tool, such as an Excel spreadsheet, Google Sheet, SharePoint, or Microsoft Access database. This is especially useful if staff are working from home or from different branches.
- While it does take additional time, many patrons do appreciate receiving notifications about their requests, whether approved, denied, or on its way. Some libraries send a separate email notifying patrons of the status of their request, along with instructions on when and how to return an item. Staff can also create an Amazon gift message for the patron when ordering the book, but this option is not always available when purchasing from third-party sellers.
- In addition to a Zip Books tracking tool, you can also make use of your existing integrated library system or library management system to help with your program tracking. For example, adding notes in a patron's account will help your staff keep track of patrons who have abused the program or have had problems with returning items properly or in good condition. Notes in patrons' accounts can also be used to set "friendly reminders" for patrons regarding any outstanding Zip items. Staff can also add notes to the note field of an item's bibliographic record, allowing you to quickly identify all the Zip items in your library catalog, including those that may be overdue.

## Supporting Documents

- **Sample Tracking Spreadsheet** (Attachment D)  
A simple tracking spreadsheet, such as the example shown here, can help staff easily keep track of requests from beginning to end. Additional tracking templates can be found on the Zip Books website at: <https://northnetlibs.org/policies-and-best-practices/>.
- **Patron Notifications** (Attachment O)  
Notifications can come in various forms, as demonstrated by the notices shown here. Providing as much item information, possibly even a photo of the item, can help patrons to distinguish the right item. This is especially helpful for patrons with multiple requests

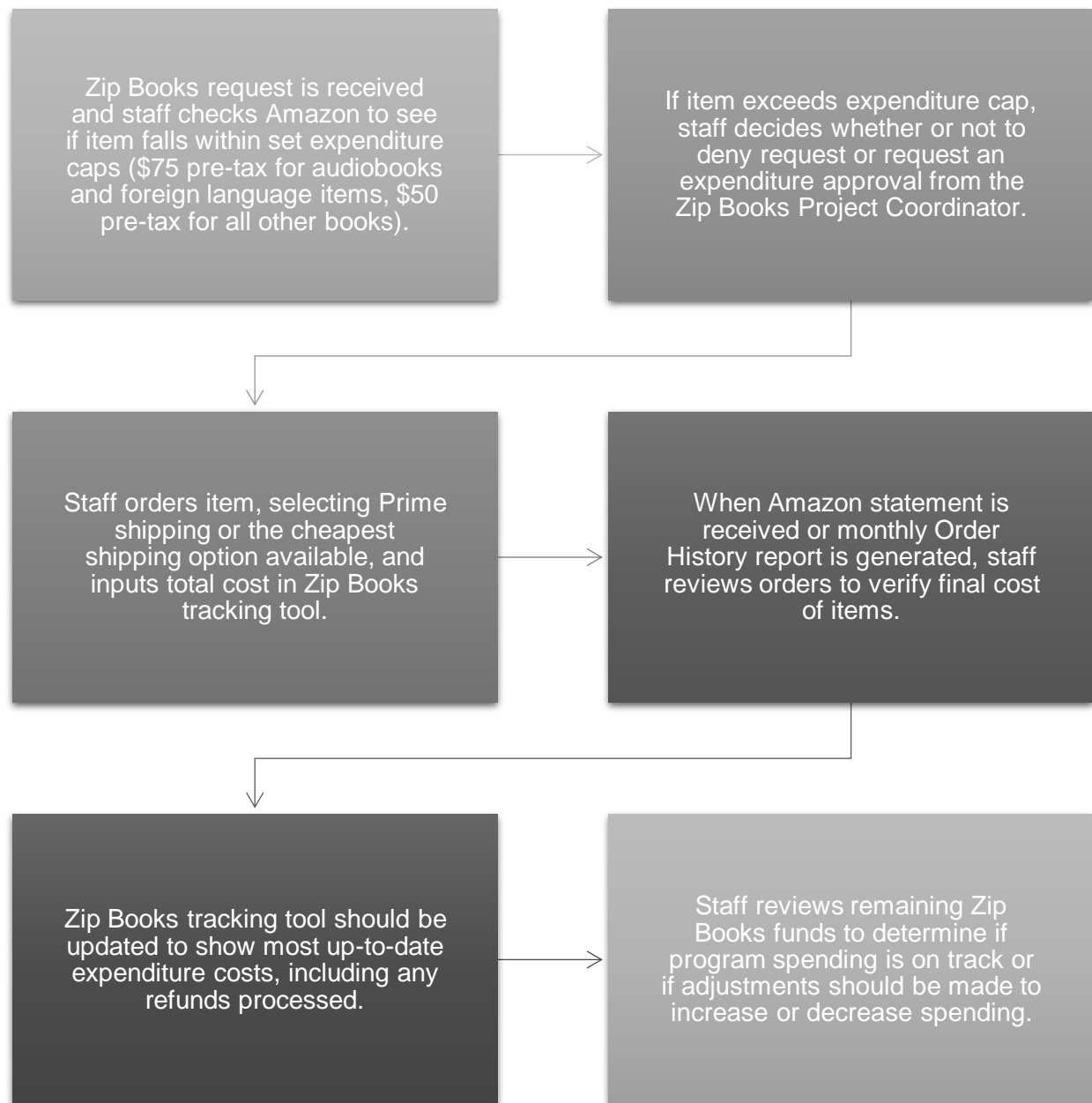


out who may have difficulty locating the item in their home.

- **Zip Books Returns Form for Staff** (Attachment P)  
To help streamline their return process, Mendocino County developed a form for staff that flags a returned Zip Book. They also included an option for patrons to indicate their interest in purchasing the item should the library decide not to add it to their collection.
  
- **Zip Books Return Envelope** (Attachment Q)  
Similarly, Pacific Grove Public Library provided each in-person patron request with a Zip Books return envelope to help streamline their return process and ensure that Zip returns are distinguished from all other returns and donations. This also allows patrons the freedom to return their items using the library book drop instead of having them to come into the library to return the item directly to a staff member.
  
- **Book Strap** (Attachment R)  
For patrons that prefer to pick up their Zip Books items at their local branch library, or that are required to do so due to shipping issues, then creating a book strap like Lake County Library can help both patrons and staff keep better track of Zip Books requests by distinguishing these items from other library materials.

## TRACKING EXPENDITURES

*The tools used to aid in tracking expenditures might be different for libraries who have an Amazon corporate credit line versus those that have an NLS-issued credit card, but this workflow still gives a pretty good overview of when and how program expenditures should be tracked by library staff.*



## Best Practices

- No matter if you have an Amazon Corporate Credit Line or an NLS-issued credit card, it is recommended that you track your program expenditures on an ongoing basis, preferably monthly if not weekly. This will help to ensure that your program spending is on track and prevents any unexpected “surprises”, such as running out of funds too soon.
- One way to help your staff effortlessly track program spending is to simply incorporate this function into your Zip Books tracking tool. For example, if you are using an Excel spreadsheet, formulas can be built into your system so that your remaining budget is always up-to-date as requests are inputted and processed. In this way, staff will always know the amount of funds available for requests.
- Since Zip Books is a grant funded program and funding is limited, it is a good idea to also set a monthly budget as a safeguard. This can easily be done by dividing your total allocation by the number of months remaining in the fiscal year. However, even a loose monthly budget that gives your staff a range to work within can be helpful. Again, this will ensure that your program stays within its allotted budget and that you do not exceed your allocation and have to pause your program early.
- Utilize the Zip Books Fiscal Department by checking in once or twice a year to make sure your remaining allocation balance matches what is shown on their own fiscal tracking spreadsheets. You can send an email anytime to the Zip Books Project Coordinator or submit a request when you send over your monthly invoice or Order History report.

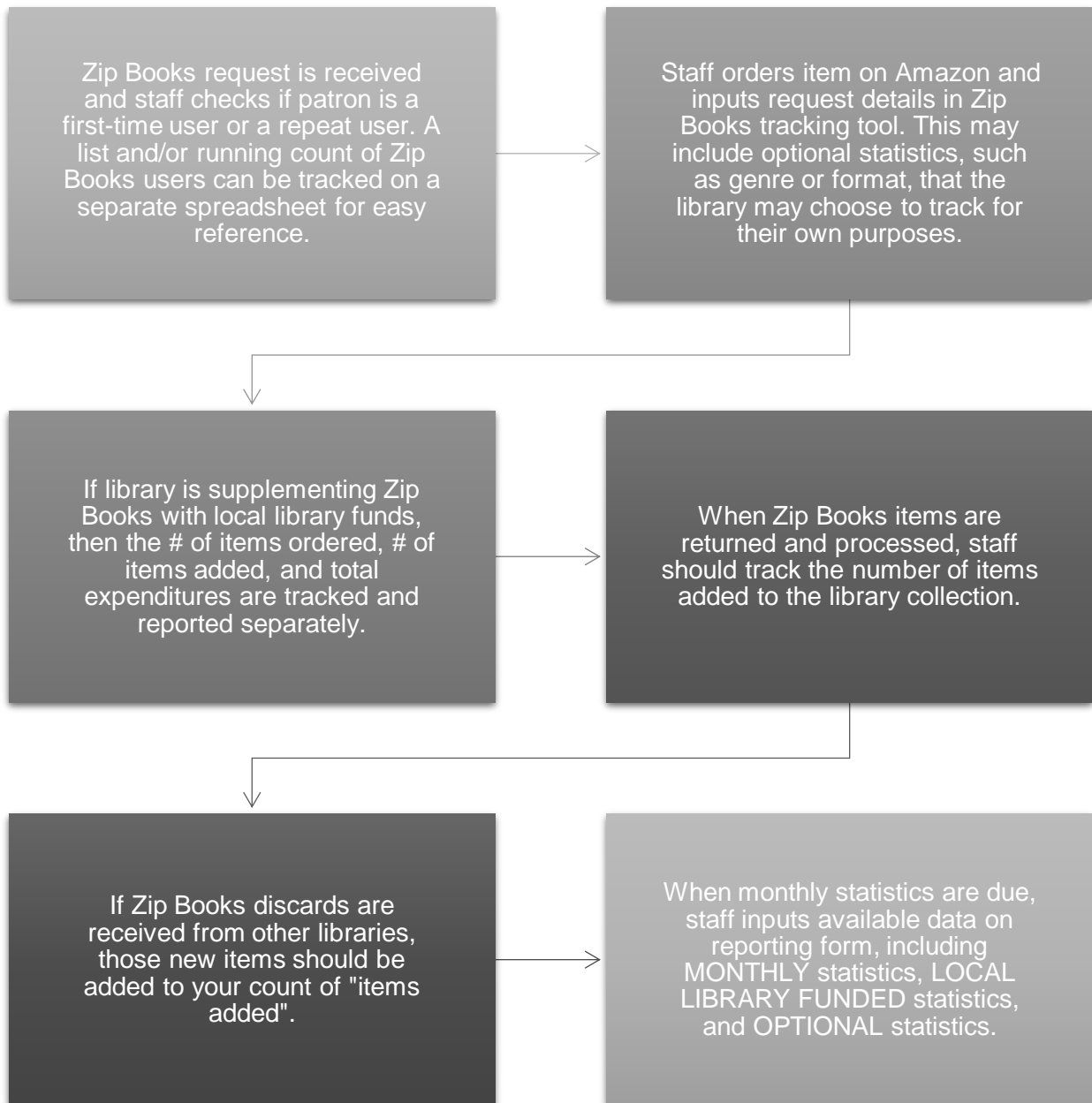
## Supporting Documents

- **Sample Amazon Invoice and Order Details** (Attachment F)  
A copy of what an Amazon invoice looks like is shown in this sample. For additional instructions on how read your monthly statement, refer to the Tracking Tools section of the toolkit.
- **Retrieving E-Statements** (Attachment J)  
For libraries that have set up online access to their Amazon Corporate Credit Line and signed up for electronic statements, instructions are provided on how to retrieve current and past statements.

- **Sample Order History report** (Attachment G)  
A sample of a general Order History report is shown here. However, individual reports may look differently depending on each library's type of Amazon account and data retrieval method used.
  
- **Amazon Data Request Instructions** (Attachment H)  
These instructions show how to generate an Order History report through Amazon's website. Additional information is provided in the the Tracking Tools section of the toolkit, including instructions for using a Google Chrome Extension to generate a similar report.

## TRACKING STATISTICS

*This workflow demonstrates where your monthly statistics can be tracked throughout the Zip Books process in order to make statistics reporting easy. Keep in mind that statistics should be tracked from the 1<sup>st</sup> of the month to the last day of the month. This differs slightly from the monthly invoices and Order History reports, which follows a different billing cycle.*





## Best Practices

- In the past, many libraries used the Order History reports to track their running total of Zip Books users. However, with Amazon's new Data Request function, this cannot easily be done each month. Libraries may find it more useful to create a separate Excel spreadsheet or even a Word document to track your first-time users. Alternatively, libraries can also build a separate column into their internal tracking tool in order to track this information.
- The new statistics reporting form was designed to help libraries easily track the growth of their Zip Books program over the course of the fiscal year. Instead of inputting your monthly data on a new form each time, try saving your previous month's report under a new file name and inputting your new data as you go. This not only serves to double-check your statistics so that your running total of Zip Books users is always accurate, but should staffing changes occur, it means all your reported statistics can be found in one place.
- If your library does not set a due date for Zip Books items to be returned, it may be useful to review all outstanding items at least once a year. If patrons have had items out for more than 6 months, a friendly reminder can help to encourage more items to be returned or identify items that are missing or were returned incorrectly.

## Supporting Documents

- **Statistics Reporting Procedures** (Attachment K)  
For a complete overview of statistics reporting, review the "Zip Books Statistics Reporting Procedures for FY20-21" document.
- **Sample Statistics Reporting Form** (Attachment L)  
Screenshots of the statistics reporting form, including the different reporting tabs, are shown in the Supporting Documents section of this toolkit. The most up-to-date form can be found online at <https://northnetlibs.org/statistics-reporting/>.

# TRACKING TOOLS

## Organized by Type

This following section discusses some of the resources and tools that can be utilized by your library to aid in program tracking. You may choose to utilize some or all of the various tools available, depending on the size and needs of your program.



Photo courtesy of Christian Koszka, FreeTime Productions

## INTERNAL TRACKING TOOL

As part of the program requirements, libraries are required to develop a tool to internally track Zip Books items and keep record of all your program orders and activities. Many libraries use an Excel spreadsheet, but other platform suggestions include SharePoint, Google Sheets, and Microsoft Access. Some libraries prefer an “old school” method instead and will maintain Zip Books file folders or binders. While this may work for smaller libraries that do not process many requests, there are limitations to this approach. For instance, if you have multiple staff members working on Zip Books from different locations, such as from home, then this analog approach will not work. Although creating a tracking tool on Excel or another platform will require some initial set up time and work, it will pay off in the long run to have a tool that is accessible, adaptable, time-saving, and easy to use.

Whatever method your library decides on, this tool will be what your team will use to track a Zip Books request from when it is placed to when the item is returned to the library. Information included in your tracking tool should consist of:

- Patron name and contact info, including shipping information. At Kern County Library, they choose to indicate their library card or borrower number instead
- Library branch where requested
- Book title, author, and format (regular print, large print, or audiobook)
- Item costs, including refunds and returns
- Genre type or collection (e.g. Children’s, Adult Non-Fiction, Mystery, etc.)
- Date requested, date ordered, and date due
- Order status (e.g. ordered, returned, etc.)
- Item added or not added to library collection
- Patron communications
- Comments and notes, including why an item was not ordered, if an item had to be reordered, or if there have been past issues with this patron

Besides your normal patron and item information, you may also want to include notes regarding past orders or patron issues. For instance, when patrons claim an item was not delivered to them and must be reordered or sent to another acceptable address, you will want to add notes about that particular order or patron. Additional patron communications can also be tracked, such as whether or not a gift message was included or if an email reminder was sent. If multiple staff members are communicating with patrons, this helps to lessen confusion and additional work.

To make your Zip Books team always aware of the amount of funds available for requests, your tracking tool can also be used to continuously track program spending. If you are using an Excel

spreadsheet as your tracking tool, formulas can be built into your spreadsheet to automatically deduct expenditures from your allocation balance as each request is inputted and processed. To ensure that expenditures are tracked correctly, it is recommended that you reconcile your tracking tool against your monthly statement or Order History report, as item and shipping costs can occasionally change between the time an item is ordered and it is shipped, which is when Amazon bills your payment method. This would also be the time in which to note any refunds or returns so that your available balance is accurate.

Likewise, your tracking tool can be used to help you gather statistical data that your library will be required to report on a monthly basis. It can be as simple as making sure those points of data are tracked, such as whether or not an item is added to your library collection. However, if you are familiar with Excel formulas, you can also choose to build your system to automatically gather statistical data as needed. This is demonstrated in the “Riverside Public Library Zip Books log template”, available at: <https://northnetlibs.org/policies-and-best-practices/>. In their template, a separate tab was created specifically for gathering stats, allowing them to quickly calculate the requested data by simply entering the date parameters. This may be too advanced and unnecessary for small libraries, but it gives you an idea of the things that can be done to help



Photo courtesy of Christian Koszka, FreeTime Productions

streamline your program. A separate tab can also be created to specifically help you track your running total of Zip Books users. Since patrons are only tracked once the first time that they use the program, you will want some way to check if they have been counted already. Creating a list of Zip Books users, either by name or library card, is a simple way to do this. Other libraries have tracked this by adding a separate column to indicate a “YES” for new patrons or a color-coded “F”, which is what Mendocino County Library and Torrance Public Library has chosen to do.

With so many elements being tracked, it may be useful to create and utilize a shorthand or color coded system for notes, such as indicating “Billed” for items that were billed to a patron account or highlighting items in yellow that have any issues, like if an item is backordered. Providing a quick reference guide or instructional sheet for your tracking tool is also a good idea if you have multiple staff members working on Zip Books, all of whom may be inputting data into your tracking tool. This not only prevents confusion and possible errors while inputting data, but it also ensures consistency even if staff changes should happen. The “Riverside Public Library Zip

Books log template” also provides a useful guide on how their template works. Additional instructions are included using the “Note” function on Excel, but adding “Comments” would also work. While your guide, or tracking tool for that matter, need not be as detailed or complex as what Riverside Public Library has created, leaving some instructions is still a good practice.

In addition, along with the requests that you process you may also want to track those requests that do not get approved, for your own internal purposes. While we like to say that Zip Books is a quick and convenient way for patrons to receive the items they are looking for, not every request received gets fulfilled. The reasons for this may vary. For example, it could simply be because the item cannot be found on Amazon or it is too expensive. Quite often staff may find that the library already owns the item. If you find that you are not getting a lot of requests or that many requests are not being fulfilled, being able to track that and further explore the reasons why, may help you to improve your service and be able to better communicate program parameters to patrons.

An example of a simple tracking spreadsheet is included in **Attachment D**. For most small programs, this template provides everything needed to keep track of their Zip Books requests. For a slightly more detailed template, check out “Merced County Library Zip Books Stats and Budget template“ available at: <https://northnetlibs.org/policies-and-best-practices/>. Conversely, other larger libraries have found it necessary and more beneficial to design more complicated spreadsheets, or even create an Access database to track their Zip Books orders, as Sacramento Public Library has done. The complexity of your tracking tool will depend on your own program needs. You may find that as your program grows so must your tracking tool. However, you will want to keep in mind the staff time and labor required to input information and maintain the overall system, and try to limit data entry to only what is required. A fine-tuned tracking system will have everything needed to track a request without any redundant information.



## AMAZON ACCOUNT FEATURES

*Using the tools already available to you through your Amazon account can help your library keep up with tracking requirements. The following are some of the most commonly used tools, but other resources are available including Amazon's Help page. Also, if your library has a Business Amazon account, there may be additional tools offered. Should there be issues with your Amazon account or with an order, you do have the option to contact an Amazon Customer Service representative either by phone or by chat. Most libraries report having better luck using the chat option. Keep in mind that the representative you are connected with may not have all the answers to your questions so you may need to contact them more than once. Note that this is separate from your Amazon Corporate Credit Line, which has its own contact number. This is discussed further in the "Online Credit Line Account" section.*

### Your Orders Page

Your Orders page is a handy resource that allows you to see all the orders placed by you and your Zip Books team (see **Attachment E**). You can view the orders placed in the last 3 months, last 30 days, throughout the whole year, or in past years. By using the provided search bar you can also do a search for items by title, author, subject, order number, and sometimes even by the name of the person to whom the item was shipped. This would be useful if you are trying to determine if a specific title has already been ordered before, since program parameters do allow duplicate requests up to 3 copies.

To further assist your staff in keeping track of pending orders, you can also click on "Open Orders" to view those items that have yet to be delivered. This would include orders that are backordered or that having a pending publication date, which some libraries may choose to order at the time of the request instead of waiting. Checking under "Cancelled Orders" will also help staff keep on top of items that may be unexpectedly cancelled, such as those ordered from third-party sellers, requiring you to order the item once again.

### Order Details and Individual Invoices

Also available through Your Orders page are the Order Details and individual Invoices for each order placed. Both provide useful information such as the order number, item ordered, delivery address, shipping date, total charged, date charged (this is usually the date shipped instead of the date ordered), and payment method used. All of which you may need to input into your internal tracking tool if it is not automatically done at the time of ordering.

The Order Details page also includes helpful options such as "Track package" or "Return or

replace items". These tools can come in handy when a patron claims an item was not received and you need to try to track down the order or possibly reorder the item for them.

On occasion, NorthNet's Fiscal Department may ask for the individual Order Details for a specific order. For instance, when duplicate items are ordered during the same month, Fiscal staff will request additional information in order to verify each item was shipped to different patrons. In situations such as this, a copy of the Order Details or printed Invoice is all that is needed. A sample of an Order Detail is shown in **Attachment F** of the Supporting Documents section.

## Address Book

Another Amazon Account feature that libraries will sometimes use to help them track their running total of Zip Books users is the address book. A screenshot of an Amazon address book is shown in **Attachment E**. For libraries that are just beginning or that have relatively small programs, counting the number of names listed on Your Addresses page is a quick and easy way to gather this statistic. However, there are limits to this approach. For example, if your library has more than a hundred addresses saved then it can be quite a lot to count. Furthermore, if your library has a standard Amazon account, then your address book is limited to only 500 names, at which point Amazon will start randomly deleting names off your list.

If your program has been around for a number of years, or your program is extremely popular in your community, then using your address book to count your number of users will only work until you hit the 500 mark. To avoid this issue, some libraries have opted to upgrade to a Business Amazon account, which has no such limit. An equally effective approach, although it may require some time and planning, is to create a separate Excel spreadsheet or even Word document to list and number your first-time Zip Books users by name or even library card number. To help you start this list, libraries can generate an Order History report and adapt that report, making sure to delete any duplicate names. This is further discussed in the next section. For libraries that choose to stay with the standard Amazon account, it is recommended that staff routinely purge old addresses from your address book to avoid having to reinput addresses for frequent users.

## ORDER HISTORY REPORTS

*Order history reports are another tool that libraries can use to aid in tracking program expenditures. However, some libraries have also used it for statistical tracking. There are currently three ways in which a library can generate an Order History report, further discussed below. The resulting reports will look different from one another, but will include most of the information one would need. The reports, available as a .csv file that can be converted to an Excel file, include useful information such as Order ID, title, category, order and shipping dates, shipping information, payment information, and item and shipping costs. Information on refunds and returns is also available, which you will want to take into account when reconciling expenditures, but that data is accessed differently depending on the method used to generate the report.*

*If your library was issued an NLS credit card, then your monthly statements are sent directly to NorthNet for processing instead of to your library, and you are required to generate an Order History report to be sent to [ZipBooksInvoice@northnetlibs.org](mailto:ZipBooksInvoice@northnetlibs.org) for review each month before your payment can be processed (see item 4 of **Attachment C**). This is so NorthNet's Fiscal Department can reconcile your credit card statement against your Order History report and verify the amount spent. Likewise, libraries are encouraged to use these reports for their own reconciliation purposes as item and shipping costs can sometimes change from the time it is ordered to the time it is shipped, which is when Amazon charges your payment method for the order. For their reconciliation purposes, the Fiscal Department will filter and sort orders by shipping date, and review those orders placed between the 7<sup>th</sup> of the previous month and the 6<sup>th</sup> of the current month to match the billing cycle of the NLS credit card statements. However, libraries may find it more useful to keep their Order History reports organized by order date, which is when requests are most likely inputted into your tracking tool.*

*Should your library not already have a process in place for tracking your running total of first-time Zip Books users, then Order History reports can also be used to track this statistic. To do this, just apply a Data Filter to the full report, then sort by shipping address or the requestor's name. Names will be sorted by the first letter of the first name and will include duplicate listings that you will need to remove since patrons should only be counted once no matter the number of times they have used the Zip Books program. This process may take time if you have a large number of users so it is recommended that you save yourself time and effort each month by creating a reference list of users to which new users can be added, or by adding a specific column in your tracking spreadsheet to help identify your new users, as mentioned in the above section about the "Internal Tracking Tool".*

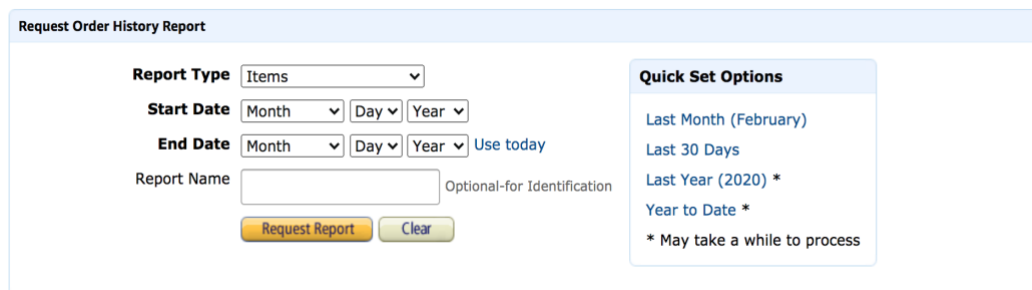
*The three methods for generating an Order History report and their various benefits and drawbacks are discussed below. Keep in mind that Amazon features and procedures may*

sometimes change, or become unavailable due to changes to their website. However, you should still be able to generate a report through one of the other means available. If your library has an Amazon Business account, then the process for generating your Order History report remains the same as it was before and no changes need be made. These instructions are provided in the “Zip Books Invoicing Procedures” document found as **Attachment C** in the Supporting Documents section. No matter the method used, all libraries are encouraged to retain copies of full or monthly Order History reports for your own recordkeeping and auditing purposes. It is recommended that these be held for a period of one year after the end date of the grant. Should libraries also wish to retain copies of their NLS credit card statements, requests can be sent to the NorthNet Fiscal Department at [ZipBooksInvoice@northnetlibs.org](mailto:ZipBooksInvoice@northnetlibs.org).

## Amazon Order History Reports

Another feature available through your Amazon account is the ability to generate Order History reports. Previously, this feature was easy to find and use, allowing libraries to quickly generate four types of reports:

“Items”, “Orders and shipment”, “Refunds”, and “Returns”. For a time, this feature was unavailable on the website and was replaced by the Data



Request function (discussed below). Fortunately, Amazon has recently reinstated this old feature, although it is not as easy to locate as it was before. It is unknown whether or not this change is permanent, and the process will differ slightly from the original instructions shared in the “Zip Books Invoicing Procedures” document (see **Attachment C** in Supporting Documents).

To find this feature once again, you would log into your Zip Books dedicated Amazon account and go to “Your Account”. Under the “Ordering and shopping preferences” box (found on the left center of the page), you will find the option to “Download order reports”. Clicking on this link will take you to the Order History Reports page where you would generate your reports as before, by selecting the “Report Type”, inputting the Start and End Dates, and indicating a “Report Name” for easy reference. For monthly Order History reports, an “Items” type report is all that is needed. Occasionally, the Fiscal Department may request that you also generate an “Orders and shipment” report or a “Refunds” report, such as during the end of the fiscal year when they are working to reconcile your account. It can sometimes take a few minutes to generate the reports

and an email will be sent once the reports are available for download, but the process is much quicker than the Data Request function. Alternatively, a search of “Order History Report” in the Help page search box will also bring you to the right page.

## Your Account

**Your Orders**  
Track, return, or buy things again

**Gift cards**  
View balance or redeem a card

**Your devices and content**  
Manage your Amazon devices and digital content

**Ordering and shopping preferences**

- Your addresses
- Your Payments
- Your Amazon profile
- Archived orders
- Manage your lists
- Your Amazon Day
- Download order reports**
- 1-Click settings
- Amazon Fresh settings
- Language preferences

## Help & Customer Service

### Help Topics

- Shipping & Delivery
- Returns & Refunds
- Managing Your Account
- Payment, Pricing & Promotions
- Ordering
- Kindle
- Amazon Fire TV
- Digital Music, Instant Video & Apps
- Gifts, Gift Cards & Registries
- Security & Privacy
- Author, Publisher & Vendor Guides
- Site Features

### Find more solutions

**order history report**

### Help Search Results

19 search results for **order history report**

**Create an Order History Report**

The Order History Reports feature allows customers to download shipment, return, and refund activity for Amazon.com orders. The report is in a "csv" format, which is compatible with Microsoft Excel.

in [Ordering](#) > [Placing Orders](#) >

## Amazon Data Request

For a time, changes to the Amazon website resulted in libraries being unable to quickly generate Order History reports. Instead, users were required to submit a Data Request to Amazon, which could take anything from a couple of days to a week to receive. This new process was clunkier and required some planning. The biggest inconvenience and hurdle for many libraries is the one-time password that is required to access your reports once they are available to be downloaded. This requires staff to have access to the phone number associated with their Zip Books Amazon account. If staff are able to use their personal cellphones this is not an issue, but those that are unable to do so, may have trouble receiving their password using their work line. Keep in mind, that if you do choose to use your personal cellphone as the number associated with your Amazon account, this may require disassociating your number from your personal Amazon account. One can change this each time you need to access your report, but it can be a hassle.



At the time of this update, the previous way of generating Order History reports has been reinstated on the Amazon website and the Data Request function seems to have been deactivated. However, it is unknown whether or not this change will be permanent so the procedures are being included for reference but may not be accurate or available. Step-by-step instructions on how to use the Data Request function to retrieve a “Retail.OrderHistory.zip” report can be found in **Attachment H**. Note that the reports generated using this method will include ALL the past orders placed through this account. If you want a history of all your past expenditures this is helpful, however, for the monthly reports requested by NorthNet’s Fiscal Department, libraries are asked to edit the reports to only include the requested time frame, which is usually the 10<sup>th</sup> of the previous month to the 10<sup>th</sup> of the current month. Also, refunds and returns are not included in the “Retail.OrderHistory.zip” report. Instead, you will need to download a separate report titled “Retail.OrdersReturned.Payments.zip”.

## Google Chrome Extension

As an alternative to Amazon’s new Data Request function, libraries also have the option to use the Amazon Order History Reporter Chrome extension. This option does require your library to use a Google Chrome browser and download an extension from the Chrome Web Store. A preview of the extension along with the link to where you can download it is shown in **Attachment I** of the Supporting Documents section. Many staff members have indicated that this option is much easier to use and does not require any waiting time. However, there are a few things that you should be aware of. Firstly, you will want to make sure that you are able to download and install this extension to your Chrome browser on your work computer, which due to local restrictions may not be allowed. Secondly, you may need to routinely delete your cookies in order to make this extension work, otherwise new data may not be generated. Thirdly, much like Amazon’s “Retail.OrderHistory.zip” report, all past orders will be generated, but it will be limited to the selected year. You will still need to edit the reports to only include the requested time frame for your monthly Order History reports submitted to the Fiscal Department for review. If you are wanting to gather ALL past data you would need to generate a report for each year and compile the results together. If this is your goal, such as when you are trying to build your list of Zip Books users, then it may be more efficient to submit a Data Request to Amazon and generate one large report instead.

Step-by-step instructions on how to use this extension are provided on the extension page of the Chrome Web Store. The extension will not work unless you are signed into Your Orders page on your Zip Books Amazon account. To use the extension, click on the puzzle icon, usually located at the top right corner of your browser. If you have multiple extensions installed you will need to select the appropriate one.

## MONTHLY AMAZON STATEMENT

For the libraries that set up an Amazon Corporate Credit Line (ACCL) as the payment method for their Zip Books program, a monthly statement will be sent to your library, either by mail or by email if you signed up to receive e-statements. Printed statements usually begin arriving around the 15<sup>th</sup> of the month, though they can sometimes take longer to arrive, while e-statements are sent out on the 10<sup>th</sup> of the month. Instead of submitting an Order History report to the Fiscal Department for review each month, libraries with a credit line are asked to scan ALL pages of the statement and email it as a PDF file to NorthNet at ZipBooksInvoice@northnetlibs.org. Refer to the **Attachment C** for the full invoicing procedures. Once received, the Fiscal Department will review and audit invoices in order to closely track expenditures and ensure program policies are being followed. Libraries are also encouraged to do the same for their own fiscal reconciliation. This can be done each month when statements are received or on a bi-monthly or quarterly basis, depending on staff time and your available funds. For instance, staff might want to keep a closer watch on expenditures during the end of the fiscal year, or when you are nearing the last of your allocated funds, to ensure that your program does not overspend.

When reconciling your internal tracking tool with your statements, it is useful to know that Amazon does not charge the cost of an item until it is actually shipped. This is good to know for two reasons. Firstly, sometimes shipping costs, and even item costs, can change between the time that the order was placed and when it is shipped and charged to your credit line. Reconciling your credit line charges against your tracking sheet will ensure that your expenditures are inputted correctly and that you are not inadvertently shortchanging yourselves. Secondly, even though staff might have placed orders on the 8<sup>th</sup> of the month, if it does not ship out by the 9<sup>th</sup>, then it will not be included in that month's invoice. This is due to Amazon/Synchrony's billing cycle, which runs from the 10<sup>th</sup> of the previous month to the 9<sup>th</sup> of the current month. This is especially important to be aware of when libraries are trying to meet expenditure deadlines, such as when check-in dates are set or when transitioning from one fiscal year to another. You will also want to keep this in mind should you ever request an allocation balance from NorthNet's Fiscal Department so that you are aware at which point you will need to refer to your own internal tracking tool to calculate your most recent purchases.

An example of what an Amazon statement will look like can be found in **Attachment F**. The first pages of your statement consists of the "Payment Stub". This is what NorthNet's Fiscal Department submits to Synchrony, along with a check payment, so that they know how to apply the payment (as indicated by a check box next to the invoice number). The "Payment Stub" includes any "Payments Received" and processed by Synchrony since the last statement, a list of the Current Invoices (listed by payment or shipping date), and any "Unapplied Payments & Credits" due to refunds or returns. On the bottom of the last page of the "Payment Stub" will be

the total balance due, along with a summary of the current total invoices, previously billed invoices that are overdue, and the total amount of credits. A space is provided for staff to indicate the total payment amount enclosed.

Keep in mind that a payment may not always be due at the time. This is because invoices are due 60 days after the end of the last billing cycle. For example, invoices included in your 10/10 statement, which includes orders placed between 9/10 – 10/9, are not due for payment until 12/5. All payments are due on the 5<sup>th</sup> of each month. When reviewing your statement, the Fiscal Department will make note of this due date and will bulk your monthly orders together using this date. What this means is that invoices processed before 10/9 will be counted as part of the 10/10 statement, while orders processed between 10/10 – 11/9 will be counted as part of the 11/10 statement. While your internal tracking spreadsheet may organize orders a different way, it may be helpful to know this in case you should ever ask for a confirmation of your remaining Zip Books funds. Oftentimes, Fiscal staff will not only provide this balance, but also include a breakdown of your expenditures, which will be listed by statement date and due date. This is different from your monthly statistics, which are tracked from the 1<sup>st</sup> of the month to the last day of the month.



Photo courtesy of Christian Koszka, FreeTime Productions

Following the “Payment Stub” are the “Current Invoice Details”, which is a breakdown of each of the current charges. These are the pages that your staff will most likely refer to when reconciling your fiscal tracking since it includes all the items included in an individual order, the item description/title, item price, shipping and tax costs, and balance due. You will notice that the “Date of Sale” may not match the Order Date listed on your tracking sheet. Again, this is due to Amazon’s practice of not charging orders until they are actually shipped. If you have any “Previously Billed Invoices”, those invoice details would be included in the statement they originally first showed up on. When reconciling your accounts, you should also take notice of any credits listed for any refunds or returns so that you can made adjustments to your expenditures. Unfortunately, Amazon does not provide the item title for these refunds, so you will need to do a bit of sleuthing to determine what items these refunds are for. This is when using other tracking tools, such as Your Orders page on Amazon where you can find a list of “Cancelled Orders” or do

a search of orders from the last 30 days. If you have set up your online credit line account, you can search your open and closed invoices by the invoice number provided on the statement. This is different than the order number shown on the order details or individual invoice, as provided by Amazon.

For the sake of convenience, both for library staff and NorthNet's Fiscal staff, libraries are encouraged to sign up for e-statements, if possible. This will not only ensure that invoices are received on time, but it helps to avoid any issues of access which can happen when staff are out on vacation or libraries are closed for a period of time, such as with the pandemic. This is especially useful when you remember that your library will be responsible for paying out-of-pocket any late fees that are incurred due to invoices not being received on time (see item 3 of the "Zip Books Invoicing Procedures" shown as **Attachment C**). This can be avoided by simply signing up to receive digital statements instead, or by confirming that your account is set-up as a "Government/Non-Profit Entity". Doing so will mean that any late fees accrued will automatically be credited back to your account on the following month and will not need to be paid for by your library. If you did not indicate you were a government or non-profit entity at the time that your credit line was set-up, you are still able to contact Synchrony and request that your account be updated as such. They may not be able to reverse past late fees, but it will help you avoid paying any future late fees. Another benefit of digital statements is the quality and search functionality of the PDF files. This is helpful when the Fiscal Department are trying to reconcile accounts and are searching for a particular title. To sign up for e-statements, you will need to first set up online access to your credit line account. Instructions on how to do this are shared in the following section.

No matter if you receive digital or printed copies, all libraries are encouraged to retain copies of any invoices received for your own recordkeeping and auditing purposes. It is recommended that these be held for a period of one year after the end date of the grant.

## ONLINE CREDIT LINE ACCOUNT

In order to be able to use your online credit line account as another tracking tool, you will first need to set up access to it. To do this you must have the authentication code provided on your most recent statement, shown on the very first page. Be aware that this code is only valid for a short period of time. If the provided code is no longer valid, you will need to wait until you receive a new code with your next statement or request that one be mailed to you. Alternatively, you may also call Synchrony (1-866-634-8381) for assistance or to see if a code can be provided over the phone. Contact information for Synchrony and their Customer Service line is also provided on the last page of the Payment Stub included with your monthly statement. To set up your online account, go to [amazon.com/creditline](https://amazon.com/creditline) and select the option to “Manage your account online”. Under “First time user?”, click the link to “Get UserID/Password” and complete the registration form. The Business Contact Email Address that you input will be the email to which notifications will be sent when your e-statement is available for viewing.

Once your online account is set up, you will need to go to Account Management to sign up for e-statements. However, if the billing period has already ended for that month (on the 9<sup>th</sup>), you may need to wait until the following month to start receiving e-statements. Statement notifications will be sent by email and you will need to log into your account to download the file. For step-by-step instructions on how to retrieve your e-statement and a preview of what your online credit line account will look like, see **Attachment J** in the Supporting Documents section.

Along with viewing and downloading your current and past statements, you will also be available to view and monitor your available credit. Note that this is completely separate from your Zip Books allocation as this limit is set by Amazon/Synchrony when you set up your credit line and we have no say on that. Generally, libraries do not have to worry about reaching their credit limit since NorthNet submits a payment each month, whether or not a payment is due. Nevertheless, sometimes towards the end of the year payments can be delayed so you may want to keep an eye on this and reach out if it looks like you may be close to reaching your limit. Libraries can also request a limit raise from Amazon/Synchrony if they wish.

Other features available for use include viewing open and closed invoices, generating an order history report by date range (again, this will look different from other reports and may not have all the information needed), viewing payments, and general management your account.

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## INTEGRATED LIBRARY SYSTEM

On top of utilizing your Zip Books tracking tool, staff are also encouraged to make use of your existing integrated library system or library management system to help with your program tracking, whether it is Horizon, Sierra, Koha, or some other system. For example, as part of their normal request process most libraries will check a patron's account to make sure that they do not have any outstanding fines or fees. This is often a requirement for patrons to be eligible to use the Zip Books program. Adding notes in a patron's account will also help your staff keep track of patrons who have abused the program or have had problems with returning items properly or in good condition. This can help you determine if they should lose their good standing, either temporarily or permanently, and whether or not to process their requests.

Notes in patrons' accounts can also be used to set "friendly reminders" for patrons regarding any outstanding Zip items. It also provides an easy means for you to place a fine on a patron's account for items that were damaged or lost. Keep in mind that libraries can only bill patrons for the amount that was originally paid for the item. And if your library charges a nominal fee to use Zip Books, much like you would with an interlibrary loan request, your integrated library system can also be used to charge this fee.

You are not just limited to adding notes to a patron's account. You can also add notes to the note field of an item's bibliographic record, allowing you to quickly identify all the Zip items in your library catalog. Lake County Library does this as highlighted in their Staff Procedures, shown in **Attachment N**. Other libraries may find this useful in helping to build Zip Books displays or in gathering their own circulation statistics for Zip Books items.



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## ZIP BOOKS FISCAL DEPARTMENT

While it is always good practice for your library to do your own expenditure tracking and fiscal reconciliation, whether weekly, monthly or quarterly, sometimes you may have questions or simply want to verify your remaining allocation balance. Should your library have any questions regarding your funding availability, you are always welcome to reach out to the Zip Books Project Coordinator who will work with NorthNet's Fiscal Department to provide the information needed. Any issues that you have with your Amazon Corporate Credit Line or your NLS credit card, should also be forwarded to the Fiscal Department. For instance, if you are unable to place any orders or if you receive error messages, then you may have exceeded your available credit or there could be an issue with your credit card. While Fiscal staff may not always be able to help rectify the situation, sometimes it will require you to work with your own Finance Department, it is still useful for them to be aware of any fiscal issues you may be having.

Although NorthNet's Fiscal Department regularly monitors program spending, you will need to keep in mind that there are limitations to what they can do. Firstly, Fiscal staff can only work off the monthly invoices and Order History reports received so if any of these invoicing documents are missing or have not been submitted to the Fiscal Department, then their numbers will be incomplete. Secondly, these invoices and Order History reports may not include any orders your library placed since the last day of the invoice billing cycle. Keep in mind also that the billing cycle will be different depending on your library's payment method. For those with an Amazon Corporate Credit Line, your monthly statement will include charges up to the 9<sup>th</sup> of the month. For those with an NLS credit card, your monthly statement includes charges up to the 6<sup>th</sup> of the month.

So while the Fiscal Department is available to assist whenever needed, your most accurate and up-to-date spending numbers will ultimately come from your own tracking tool when reconciled against your monthly invoices or generated Order History reports. The information in this Tracking Toolkit was provided by the Fiscal Department and includes procedures that they themselves follow, so it is their hope that this additional tool will help you to better track your Zip Books program expenditures.

# Supporting Documents

## Attachments and Examples

The various documents included here were created by Zip Books administrative team and participating Zip Books libraries across the state. Some documentation may not have the most current information. For the most up-to-date program documentation, go to the Zip Books website at <https://northnetlibs.org/zip-books/>.



Photo courtesy of Christian Koszka, FreeTime Productions

## Attachment A - Commitment Letter

*This is an example of the Zip Books Participant Letter of Commitment that all libraries are required to sign and keep on file.*



### Zip Books Project Participant Letter of Commitment

On behalf of the \_\_\_\_\_, I agree to support the goals of the Zip Books Project (a project to test an alternative to traditional interlibrary loan services). Specifically, I certify the Library's commitment to each of the points listed below for the period of July 1, 2019 – June 30, 2020:

- 1) The Library will assign at least two staff members, one supervisory and one support staff, to participate in the project. One of these shall be designated as the Library's primary contact for project activities. The Library will inform the project coordinators at NorthNet if there are any changes to the staffing assigned to the project.
- 2) The Library will provide release time, space, and computer support for all assigned staff members, for any online project meetings or conference calls scheduled by NorthNet/California State Library. And assigned staff will attend online meetings/conference calls as required by NorthNet/California State Library.
- 3) The Library will ensure that staff members follow the policies, procedures and guidelines as outlined in the project documentation (<https://northnetlibs.org/zip-books/>) and as communicated via listserv and e-mail by the project grant monitor at the State Library and the project coordinators at NorthNet.
- 4) The Library will regularly monitor its Zip Books purchases, to stay within its allocated funds for the project year, and notify the project coordinators at NorthNet if they are encountering any delays, difficulties, or anticipated over expenditure or under expenditure of funds.
- 5) The Library will work to expend the full amount allocated to their program within the stated time. NorthNet/California State Library reserves the right to reallocate unspent funds to address the funding needs of other libraries.

- 6) The Library will offer any Zip Books purchases not added to their collection to other participating Zip Books Libraries throughout the state or within their consortium prior to donating it to their Friends of the Library.
- 7) The Library will keep project statistics as specified by NorthNet and the California State Library, and report them as requested.
- 8) The Library will participate in mid- and end-of-project surveys.
- 9) The Library will complete and submit all requested project documents and the final project survey, by the requested deadlines, including monthly invoices and order history reports.

Further, as the Library Director and/or designee, I personally will monitor the project activities and participate as much as possible.

Director Name: \_\_\_\_\_

Director Signature: \_\_\_\_\_

Designee Name: \_\_\_\_\_

Designee Signature: \_\_\_\_\_

Date:

Library:



## Attachment B – Purchasing Policies

The most up-to-date Purchasing Policies can be found online at <https://northnetlibs.org/policies-and-best-practices/>

### Zip Books Purchasing Policies for FY20-21

*This is an overview of the Zip Books purchasing policies as set by NorthNet Library System and the California State Library. With approval from the Zip Books Project Coordinator, libraries can adapt policies to fit their specific needs. In cases where policies are unclear or when specific situations fall into a grey area, library staff are encouraged to reach out to the Zip Books Project Coordinator for clarification or guidance on program policies and procedures. However, if faced with a time sensitive issue, staff may make their own call, choosing a course of action that provides customer service.*

1. **Zip Books users must be registered borrowers in good standing**
  - 1.1. This is generally defined as having a current library card with no more than \$5 in accumulated fines. However, libraries may choose to establish their own definition or restrictions, such as requiring the patron to be a resident of their jurisdiction.
  - 1.2. Borrowers may request Zip Books on the same day their library cards are issued.
  - 1.3. Libraries may choose to establish a two-strike policy that would withdraw the good standing (either temporarily or permanently) of Zip Books users who do not follow program policies or that have lost/damaged items.
  
2. **Allowable Zip Books purchases**
  - 2.1. Books available in tangible format – regular print, large print, or audiobook (MP3/CD/Playaway), including current titles in hardback or paperback and in any genre. E-books, E-audiobooks, CDs, DVDs, and any other non-book related items are not allowed unless purchased with local library funds. However, books that come with a CD/DVD included are allowed.
  - 2.2. Items not already owned by your library or whose status is listed as LOST, including items available through a shared system but that are not owned by your individual jurisdiction
  - 2.3. Prime and Non-Prime materials – so long as it can be purchased on the Amazon.com website and the cheapest shipping option is selected
  - 2.4. Used copies – if they are in good condition. Note that items purchased from other Amazon sellers will not have an option to include a gift slip/message.
  - 2.5. There are no restrictions as to genre. Current fiction is okay, but many libraries choose to limit requests to items not published in the last 6 months in order to weed out the core materials that would normally be ordered by your library.
  - 2.6. Duplicate requests for unowned items are allowed up to 3 copies
  - 2.7. Book sets can be purchased and are recommended if it is more cost-effective
  - 2.8. Textbooks and Study Guides – if they are general enough in nature to appeal to a broad audience and will be added to your collection. Textbook rentals (printed or digital) are not allowed.
  - 2.9. Adult fiction best sellers in alternative formats only (large print or audiobook/Playaway)

- 2.10. Non-fiction best sellers and young adult/children's best sellers in any format
- 2.11. Former best seller titles that are no longer on the New York Times Best Seller list or that have been on the New York Times Best Seller list for more than a year
- 2.12. Items from non-US vendors, such as foreign-language materials, so long as the cheapest shipping option is selected
- 2.13. Items that would have formerly been requested through interlibrary loan (includes current fiction/non-fiction if not part of a library's collection development focus or outside the scope of a library's ability to purchase with their own funds). You may continue to use traditional interlibrary loan at your discretion.
- 2.14. Exercise judgment when ordering items of higher cost, such as textbooks and study guides. Make sure that these titles or types of materials are appropriate for your collection.

### 3. Five item limit per patron, per month

- 3.1. Libraries should monitor the number of Zip Books requested by a patron at any one time, and may determine the maximum number, with a maximum allowable of 5 items per customer per month.
- 3.2. Libraries can choose to allow patrons their maximum allowable items all at once, or limit it to one item at a time, depending on their own borrowing policies.
- 3.3. Libraries should take into account their budgeted allotment when determining item limits. Limits can be adjusted as needed so long as patrons are informed of any changes.

### 4. Two-tiered expenditure cap

- 4.1. \$75 pre-tax and shipping for audiobooks and foreign-language items, and \$50 pre-tax and shipping for all other allowable items.
- 4.2. Higher per-item expenditures must be pre-approved by NorthNet. Should you wish to order an item more than the set expenditure cap, send the Project Coordinator an email ([nuesca@northnetlibs.org](mailto:nuesca@northnetlibs.org)) detailing what you want to purchase or a link to the item.

### 5. Shipping

- 5.1. When placing orders, you should take advantage of the Amazon Prime free two-day shipping option whenever possible. If the free two-day shipping option is not available, select standard shipping. You should not use expedited shipping.
- 5.2. Items should be shipped directly to the customer from Amazon and not to the library first for processing.
- 5.3. If it is in the best interest of the patron, exceptions may be made and items can be shipped to the library, a PO Box, or Amazon Locker (i.e....unsafe for deliveries to be made, patron request for personal reasons). Some sort of indication should be made on the shipping label identifying this as a Zip Books request so as to not raise any red flags when our Fiscal Dept reviews monthly reports. For example, the shipping name would be entered as "Patron Name – ZIP" or "Library Branch Name – ATTN: Zip Books".



- 5.4. If the patron is requesting multiple items and your library allows more than one request at the same time, a bulk order can be processed for convenience.

## 6. Staff requests

- 6.1. Library staff members that are also patrons may be allowed to request Zip Books for personal use only and should be limited to no more than 1 or 2 items per month.
- 6.2. Staff requests should be monitored onsite by the Zip Books coordinator. This will help to ensure that grant funds are used as intended.
- 6.3. Library volunteers are also allowed to request Zip Books for personal use only and are not subject to the 2 item staff limit.

## 7. Zip Books Discards

- 7.1. Items not added to your library collection should first be offered to other participating Zip Books libraries within your consortium or throughout the state prior to donating it to your Friends of the Library.
- 7.2. To help save on labor and shipping costs, libraries are welcome to share Zip Books discards with other participating libraries within their cooperative system instead of making them available to all libraries, allowing you to take advantage of your local shipping resources.
- 7.3. Items deemed too damaged for inclusion into a library collection, such as water-damaged books, do not need to be offered to other libraries and can instead be donated/discarded according to staff discretion.
- 7.4. Libraries may choose to give patrons the option to purchase their requested Zip Books if it is not added to their library collection. The price charged should be the exact amount paid by the library at the time of purchasing. Funds received should be put back into your library's collection development budget towards purchasing more materials. We are unable to add funds back to your Zip Books allocation at this time.

## 8. Using Local Library Funds

- 8.1. Libraries using local library funds to supplement their Zip Books program may choose to expand Zip Books parameters if they wish, such as allowing requests for DVDs and e-books.
- 8.2. If Zip Books parameters are expanded, you must make some sort of distinction on your program webpage and other program materials indicating that these exceptions are only being allowed while your library is using your own funds.

## Attachment C – Invoicing Procedures

The most updated Invoicing Procedures can be found online at <https://northnetlibs.org/invoicing/>. Keep in mind that some procedures may be different due to changes to Amazon's website.

### Zip Books Invoicing Procedures

***This is an overview of the invoicing procedures for all Zip Books orders. All invoices received should go to NorthNet Library System for payment. Double-check that this is the standard Amazon account dedicated to Zip Book orders (no other orders should be placed through this account to avoid confusion).***

1. When you receive your monthly invoice from Amazon **DO NOT PAY IT**. Please *immediately* scan and email the invoice in PDF format to [ZipBooksInvoice@northnetlibs.org](mailto:ZipBooksInvoice@northnetlibs.org) for payment.
2. **ANY** invoices received should be forwarded within 3 days of receipt, whether or not a payment is due. You do not need to mail in your hard copies.
3. If an invoice is not received in time and late fees are incurred, the library will be responsible for paying those late fees using their own funds. Amazon Accounts set up as a "Government/Non-Profit Entity" will have their late fees automatically credited back to their account on the following month and do not need to be paid by the library. To find out if your account is set up as a "Government/Non-Profit Entity" or to request that it be set up as such, contact your Synchrony Bank Account Manager (1-866-634-8381).
4. Libraries using the NLS Credit Card do not need to submit invoices, as they will automatically be sent to NorthNet. However, you are required to submit an Amazon-generated Order History Report by the 15<sup>th</sup> each month (see #6 below for instructions on how to create this report).
5. Any overpayment to your Amazon Corporate Credit Line (ACCL), shown as a credit or unapplied payment on your monthly statement, should be left alone as a credit in your account. This credit will automatically be subtracted from your following month's total. You should NOT request a refund check. Should Amazon/Synchrony reach out to you regarding an overpayment, please let them know that you'd like the money to remain in your account as a credit.
6. For auditing purposes, some libraries may be asked to submit individual Invoices/Order Details or an Order History report. Instructions on how to generate these files are below. All files should be sent directly to our Fiscal Department at [ZipBooksInvoice@northnetlibs.org](mailto:ZipBooksInvoice@northnetlibs.org).
7. How to create a PDF file of Invoices/Order Details:
  - a. Log into your Zip Books dedicated Amazon account
  - b. Select "**Orders**" (near Cart)
  - c. Use search bar to locate orders by title and click on "**Order Details**" next to item
  - d. Select "**Invoice**" (top right corner of order box)
  - e. Click on "**Print this page for your records**" (located at top of page)
  - f. Change "**Destination**" to "**Save as PDF**"
  - g. Click on "**Save**" and select location
  - h. Repeat process for each Invoice requested
8. How to generate an Order History Report:
  - a. Go to the instructions page:  
<https://www.amazon.com/gp/help/customer/display.html?nodeId=200131240>

If this link does not work, you can find the correct page by searching for "Order History Report" on the Help page.

- b. Click on "**Order History Reports**" in Step 1 of "**Create an Order History Report**"
- c. You may be prompted to log into your Amazon account. Be sure you are logged into your dedicated Zip Books Amazon account.
- d. Select "**Items**" under **Report Type**. This report type will include the item title and shipping information.
- e. Select **Start Date** [7<sup>th</sup> of previous month] and **End Date** [6<sup>th</sup> of current month]
- f. Enter a **Report Name**, using the following format: "Your Library Name 20XX MM 06 Order History" (e.g., "Riverside 2019 02 06 Order History," for 1/7 - 2/6 purchases).
- g. Click on "**Request Report**". It may take some time to process, and you will be notified by email when it is complete. Once the report is generated you can then download and email it directly to our Fiscal Department at [ZipBooksInvoice@northnetlibs.org](mailto:ZipBooksInvoice@northnetlibs.org).

If you have any questions, please contact the Zip Books Project Coordinator ([nuesca@northnetlibs.org](mailto:nuesca@northnetlibs.org)).

## Attachment D – Sample Tracking Spreadsheet


The following is a simple example of an Excel spreadsheet that can be used to track Zip Books requests during its various stages. Other libraries have also designed more complicated spreadsheets or created an Access database to track their Zip Books orders. The complexity of your tracking tool will depend on your own program needs.

Zip Book Requests											
								Remaining Budget	\$ 14,000.00		
Customer Name	Title	Author	Format Type (Book, Large Print, Audiobook)	Book Genre (AD FIC, AD NF, YA FIC, YA NF, J FIC, J NF, INT FIC, INT NF)	Language	Date Requested Service	Arrival (Received) Date	Item Cost	Email Sent/Called	Return Date	Added/FOL/Other Library
ex: Sarah La Torre	Twilight	Meyer	Book	YA FIC	English	3/26/18	3/30/18	\$ 19.99		4/10/18	FOL


## Attachment E – Amazon Account features

These screenshots indicate some of the available features on your Amazon account that can help you with your program tracking, including your orders page, address book, and help page. Features may look differently depending on if you have a standard Amazon account or a Business Account.


### Your Account




**Your Orders**  
Track, return, or buy things again




**Login & security**  
Edit login, name, and mobile number




**Prime**  
View benefits and payment settings




**Gift cards**  
View balance or redeem a card



**Your Payments**  
Manage payment methods and settings, view balances and offers



**All things Alexa**  
Get the most out of your Alexa-enabled devices



**Your devices and content**  
Manage your Amazon devices and digital content

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**Ordering and shopping preferences**

[Your addresses](#)

[Your Payments](#)

**Digital content and devices**

[Manage content and devices](#)

[Your apps](#)

[Prime Video settings](#)

**Memberships and subscriptions**

[Kindle Unlimited](#)

[Prime Video Channels](#)

[Music Unlimited](#)

Your Account > **Your Orders**

## Your Orders

Search Orders

**Orders**
[Buy Again](#)
[Open Orders](#)
[Digital Orders](#)
[Amazon Pay](#)
[Cancelled Orders](#)


13 orders placed in last 30 days

past 3 months


ORDER PLACED	2020	SHIP TO	ORDER # 114-6429867-5788265
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Your Account > [Your Addresses](#)

## Your Addresses



**Add Address**

Default: 

**Mercedith Nuesca**

[Add delivery instructions](#)

[Edit](#) | [Remove](#)

**Search the help library** *Type something like, "question about a charge"*

## Browse Help Topics

<p><b>Recommended Topics</b></p> <ul style="list-style-type: none"> <li>Where's My Stuff?</li> <li>Managing Your Orders</li> <li>Managing Your Account</li> <li>Returns &amp; Refunds</li> <li>Shipping Policies</li> <li>Devices &amp; Digital Services</li> <li>Amazon Business Accounts</li> <li>Large Items and Heavy-Bulky Services</li> <li>Security &amp; Privacy</li> <li><b>Other Topics &amp; Help Sites</b> &gt;</li> <li>Need More Help?</li> </ul>	<ul style="list-style-type: none"> <li><a href="#">Gifts, Gift Cards &amp; Registries</a></li> <li><a href="#">Security &amp; Privacy</a></li> <li><a href="#">Author, Publisher &amp; Vendor Guides</a></li> <li><a href="#">Pricing</a></li> <li><a href="#">Placing an Order</a></li> <li><a href="#">Sales Tax &amp; Regulatory Fees</a></li> <li><a href="#">Amazon Credit Cards</a></li> <li><a href="#">Promotions &amp; Deals</a></li> </ul>
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# Attachment F – Sample Amazon Invoice and Order Details

This is an example of what your Amazon invoice will look like, as well as a copy of the Order Details for a purchase.

## Sample Amazon Statement and Order Details

- 1) ALL pages should be scanned and emailed to [ZipBooksInvoice@northnetlibs.org](mailto:ZipBooksInvoice@northnetlibs.org)  
Statements will include the following sample pages

amazon.com

Account: 60457 8781 064078 5 Statement Date: 03/10/19 Page: 1 of 56

**CITY OF IMPERIAL PUBLIC L**  
ATTN: ADRIANA SOTA  
200 WEST 9TH ST  
IMPERIAL, CA 92251-1213

Customer Service Online at [amazon.com/creditline](http://amazon.com/creditline)  
This account is not registered.  
The authentication code is: S1181987

**PAYMENT STUB**  
Page 1 of 56

Account: 60457 8781 064078 5

**CITY OF IMPERIAL PUBLIC L**  
ATTN: ADRIANA SOTA  
200 WEST 9TH ST  
IMPERIAL, CA 92251-1213

PLEASE INDICATE ADDRESS CHANGES

**PAYMENT ADDRESS**  
SYNCB/AMAZON  
P.O. BOX 530958  
ATLANTA, GA 30353-0958

**Payments Received**

02/13/19	0002836	(1188.71)	PAYMENT RECEIVED - THANK YOU
03/07/19	0002929	(1766.08)	PAYMENT RECEIVED - THANK YOU
02/09/19	L190210-781	(12.40)	LATE CHARGE REVERSAL
01/09/19	L190110-781	(4.72)	LATE CHARGE REVERSAL

**Current Invoices (Details for Current Month's Invoices Enclosed)**

Date	Invoice	Original Amount	Due Date	Reference	Invoice	Date & Amount Due
02/07/19	497577448865	15.38	05/05/19		497577448865	02/07 15.38
02/09/19	696564887677	17.39	05/05/19		696564887677	02/09 17.39
02/09/19	868487393498	15.99	05/05/19		868487393498	02/09 15.99
02/09/19	954944973557	18.32	05/05/19		954944973557	02/09 18.32
02/11/19	854497793647	29.04	05/05/19		854497793647	02/11 29.04
02/12/19	459696376339	15.51	05/05/19		459696376339	02/12 15.51
02/12/19	435875864858	15.51	05/05/19		435875864858	02/12 15.51
02/12/19	448533643635	12.60	05/05/19		448533643635	02/12 12.60
02/12/19	443968368443	24.73	05/05/19		443968368443	02/12 24.73
02/13/19	433497865547	18.03	05/05/19		433497865547	02/13 18.03
02/13/19	549937935586	21.29	05/05/19		549937935586	02/13 21.29
02/13/19	746398579559	20.96	05/05/19		746398579559	02/13 20.96
02/13/19	469384595784	26.94	05/05/19		469384595784	02/13 26.94
02/13/19	059675653684	29.04	05/05/19		959675653684	02/13 29.04

-Continue-

COLR0813 7828 5001 SHG 34 190311 PAGE 00002 OF 00057 5534

Code needed to register account online.  
Note: only valid for a short period of time

amazon.com

**PAYMENT STUB**  
Page 7 of 56

Account: [REDACTED] Statement Date: 03/10/19 Page: 7 of 56

Account: [REDACTED]

**Current Invoices (Details for Current Month's Invoices Enclosed) (continued)**

Date	Invoice	Original Amount	Due Date	Reference
03/07/19	456464487578	10.96	05/05/19	
03/08/19	455754769334	19.28	05/05/19	
03/08/19	455945899855	17.77	05/05/19	
03/08/19	853343479353	14.39	05/05/19	
03/08/19	594333336688	6.38	05/05/19	
03/08/19	557889779347	17.20	05/05/19	
03/08/19	447895658663	22.42	05/05/19	
03/09/19	639545599378	13.57	05/05/19	
03/09/19	468938777473	18.81	05/05/19	
03/09/19	437695477565	15.99	05/05/19	

Invoice	Date & Amount Due
456464487578	03/07 10.96
455754769334	03/08 19.28
455945899855	03/08 17.77
853343479353	03/08 14.39
594333336688	03/08 6.38
557889779347	03/08 17.20
447895658663	03/08 22.42
639545599378	03/09 13.57
468938777473	03/09 18.81
437695477565	03/09 15.99

**Unapplied Payments & Credits**

Date	Reference	Original Description Amount
02/26/19	563583936766	(12.78) CR MEMO
02/26/19	655739775583	(15.06) CR MEMO
03/07/19	0002929	(1766.09) UNAPPLIED PAYMENT

Reference	Date & Current Amount
563583936766	02/26 0.00
655739775583	02/26 0.00
0002929	03/07 (62.08)



0-9 890

Current Invoices:	\$ 2526.57
Previously Billed Invoices:	\$ 0.00
Unapplied Payments & Credits:	\$ (1793.93)

Send payments to:  
P.O. Box 530968  
Atlanta GA 30353-0968

For billing/general inquiries:  
PO Box 965055  
Orlando FL 32896

For Customer Service:  
Call 1-866-634-8381

Account: 60457 8781 064078 5

**NO PAYMENT IS DUE**

PLEASE RETURN THIS STUB WITH YOUR PAYMENT

AMOUNT ENCLOSED \$

Retain left hand portion for your records, send right hand portion with your payment. If not sending stub, note account number, if being paid on your check.

If you have unapplied payments and credits, please call us at 866-634-8381 for instructions to apply. You do not need to contact us if you are paying on your check.

This is the number to call if you have questions about your statement or have not received it for the month. Note: you will need to know the account number (top of statement) and they may need to verify you work for the library

NOTE: If there are multi-item orders or duplicate orders listed, you may be asked to provide the Order Details (see sample on next page)

amazon.com

Account: [REDACTED] Statement Date: 03/10/19 Page: 22 of 56

---

AMAZON  
PO BOX 530958  
ATLANTA, GA 30353-0958

CITY OF IMPERIAL PUBLIC L  
Account : 8781 064078 5  
Location: 0001

Date of Sale: 02/20/19  
Invoice: 635687636586  
P.O. :

S.K.U.	DESCRIPTION	QUANTITY	UNIT	PRICE	EXT. PRICE
0060574259	The Berenstain Bears' Valentin	1.000	EA	6.9900	6.99
MISC	SHIPPING AND TAX	1.000	EA	0.5400	0.54
Subtotal: 7.53		Tax: 0.00		Balance Due: 7.53	

---

AMAZON  
PO BOX 530958  
ATLANTA, GA 30353-0958

CITY OF IMPERIAL PUBLIC L  
Account : 8781 064078 5  
Location: 0001

Date of Sale: 02/20/19  
Invoice: 737367866683  
P.O. :

S.K.U.	DESCRIPTION	QUANTITY	UNIT	PRICE	EXT. PRICE
0316349585	House of Robots: Robot Revolut	1.000	EA	13.9900	13.99
MISC	SHIPPING AND TAX	1.000	EA	1.0800	1.08
Subtotal: 15.07		Tax: 0.00		Balance Due: 15.07	

---

AMAZON  
PO BOX 530958  
ATLANTA, GA 30353-0958

CITY OF IMPERIAL PUBLIC L  
Account : 8781 064078 5  
Location: 0001

Date of Sale: 02/20/19  
Invoice: 875446976638  
P.O. :

S.K.U.	DESCRIPTION	QUANTITY	UNIT	PRICE	EXT. PRICE
0310734894	The Berenstain Bears' Valentin	1.000	EA	3.8300	3.83
MISC	SHIPPING AND TAX	1.000	EA	0.3000	0.30
Subtotal: 4.13		Tax: 0.00		Balance Due: 4.13	

-Continue-

COLR0813 7828 5001 SHG 34 190311 PAGE 00025 OF 00057 5534

- 2) If requested, Order Details for specified purchases should be sent as a PDF file to [ZipBooksInvoice@northnetlibs.org](mailto:ZipBooksInvoice@northnetlibs.org)

3/20/2019 Amazon.com - Order 114-4180994-0737018

**amazon.com**

**Final Details for Order #114-4180994-0737018**  
[Print this page for your records.](#)

**Order Placed:** March 7, 2019  
**Amazon.com order number:** 114-4180994-0737018  
**Order Total: \$13.04**

**Shipped on March 8, 2019**

Items Ordered	Price
1 of: <i>Mozart's Sister (Women of History) (Volume 1)</i> , Moser, Nancy <small>Sold by: Amazon Digital Services, Inc.</small>	\$11.99
Condition: New	

<b>Shipping Address:</b> [REDACTED]	Item(s) Subtotal: \$11.99
	Shipping & Handling: \$0.00
	-----
	Total before tax: \$11.99
	Sales Tax: \$1.05
	-----
	<b>Total for This Shipment: \$13.04</b>
	-----

**Shipping Speed:**  
Two-Day Shipping

**Payment information**

<b>Payment Method:</b> Amazon Corporate Credit Line	Item(s) Subtotal: \$11.99
	Shipping & Handling: \$0.00
	-----
	Total before tax: \$11.99
	Estimated tax to be collected: \$1.05
	-----
	<b>Grand Total: \$13.04</b>

**Billing address**  
[REDACTED]

**Credit Card transactions** AmazonPLCC ending in : March 8, 2019: \$13.04

To view the status of your order, return to [Order Summary](#).

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[https://www.amazon.com/gp/css/summary/print.html/ref=ppx\\_od\\_dt\\_b\\_print\\_invoice?ie=UTF8&orderID=114-4180994-0737018](https://www.amazon.com/gp/css/summary/print.html/ref=ppx_od_dt_b_print_invoice?ie=UTF8&orderID=114-4180994-0737018)
1/1

## Attachment G – Sample Order History report

The format for your order history report will differ depending on the type of Amazon account you have and how you generate the report (via Amazon or Chrome extension). Whatever you choose to use, your report should include vital information such as the item title, format, shipping date, shipping address, and cost.

A	B	C	D	N	O	R	S	T	U	V	W	X	Y	AA	AB	AC	AD
Order Date	Order ID	Title	Category	Quantity	Payment Inst	Ordering Cu	Shipment Ds	Shipping Address N	Shipping Ad:	Shipping Ad:	Shipping Ad:	Shipping Ad:	Order Status	Carrier Nam	Item Subtot:	Item Subtot:	Item Total
10/2/17	111-734175	Studio: Creative Spaces for Creative Peopl	Hardcover	1	Visa - 9818	ill@banning	10/2/17	PATRON NAME	1234 BOOK DRIVE	BANNING	CA	92220-3200	Shipped	USPS®93419	\$23.79	\$1.84	\$25.63
10/2/17	111-012842	How To Make It in the New Music Business	Hardcover	1	Visa - 9818	ill@banning	10/3/17	PATRON NAME	1235 BOOK DRIVE	BANNING	CA	92220-3200	Shipped	USPS®93419	\$20.36	\$1.58	\$21.94
10/4/17	111-742560	Comer atentos (Mindful Eating): Guvra pa	Paperback	1	Visa - 9818	ill@banning	10/5/17	PATRON NAME	1236 BOOK DRIVE	BANNING	CA	92220-3382	Shipped	USPS®93419	\$11.52	\$0.89	\$12.41
10/4/17	111-207089	The Choirboys	Paperback	1	Visa - 9818	ill@banning	10/5/17	PATRON NAME	1237 BOOK DRIVE	BANNING	CA	92220-3436	Shipped	USPS®93419	\$15.98	\$1.24	\$17.22
10/4/17	111-183567	The Sword Thief (The 39 Clues, Book 3)	Hardcover	1	Visa - 9818	ill@banning	10/6/17	PATRON NAME	1238 BOOK DRIVE	BEAUMONT	CA	92223-2084	Shipped	USPS®93419	\$8.27	\$0.64	\$8.91
10/4/17	111-249350	Yoga Body and Mind Handbook: Easy Pose	Paperback	1	Visa - 9818	ill@banning	10/5/17	PATRON NAME	1239 BOOK DRIVE	BANNING	CA	92220-3200	Shipped	USPS®93419	\$12.90	\$1.00	\$13.90
10/4/17	111-941478	And Then She Was GONE: A riveting new si	Paperback	1	Visa - 9818	ill@banning	10/5/17	PATRON NAME	1240 BOOK DRIVE	BANNING	CA	92220-3441	Shipped	USPS®93419	\$7.19	\$0.56	\$7.75
10/7/17	111-470991	The Creative Home: Inspiring ideas for bea	Hardcover	1	Visa - 9818	ill@banning	10/8/17	PATRON NAME	1241 BOOK DRIVE	BANNING	CA	92220-3200	Shipped	USPS®93419	\$22.65	\$1.76	\$24.41
10/9/17	111-094124	The Great Vegan Bean Book: More than 10	Paperback	1	Visa - 9818	ill@banning	10/10/17	PATRON NAME	1242 BOOK DRIVE	BANNING	CA	92220-3783	Shipped	USPS®93419	\$15.16	\$1.17	\$16.33
10/10/17	111-615884	The Marriage Lie (Thorndike Press Large Pr	Hardcover	1	Visa - 9818	ill@banning	10/11/17	PATRON NAME	1243 BOOK DRIVE	BANNING	CA	92220-5261	Shipped	USPS®93419	\$30.07	\$2.33	\$32.40
10/10/17	111-970486	Locke & Key, Vol. 6: Alpha & Omega	Paperback	1	Visa - 9818	ill@banning	10/11/17	PATRON NAME	1244 BOOK DRIVE	BANNING	CA	92220-2410	Shipped	USPS®93419	\$13.95	\$1.08	\$15.03
10/11/17	111-477513	Rainbow Magic Special Edition: Flora the	Mass Mark	1	Visa - 9818	ill@banning	10/12/17	PATRON NAME	1245 BOOK DRIVE	BANNING	CA	92220-2524	Shipped	USPS®93419	\$4.22	\$0.33	\$4.55
10/12/17	111-841428	To All the Boys I've Loved Before	Hardcover	1	Visa - 9818	ill@banning	10/13/17	PATRON NAME	1246 BOOK DRIVE	BANNING	CA	92220-4649	Shipped	USPS®93419	\$10.58	\$0.82	\$11.40
10/12/17	111-244097	Go Ask Alice	Hardcover	1	Visa - 9818	ill@banning	10/13/17	PATRON NAME	1247 BOOK DRIVE	BANNING	CA	92220-6127	Shipped	USPS®93419	\$15.19	\$1.25	\$17.44
10/12/17	111-069676	12 Ways to Get to 11 (Aladdin Picture Bo	Paperback	1	Visa - 9818	ill@banning	10/13/17	PATRON NAME	1248 BOOK DRIVE	BANNING	CA	92220-1928	Shipped	USPS®93419	\$6.87	\$0.53	\$7.40
10/13/17	111-927893	Switch	Paperback	1	Visa - 9818	ill@banning	10/15/17	PATRON NAME	1249 BOOK DRIVE	BANNING	CA	92220-5134	Shipped	USPS®93419	\$14.72	\$1.14	\$15.86
10/13/17	111-793898	The Christmas Chapel	Paperback	1	Visa - 9818	ill@banning	10/14/17	PATRON NAME	1250 BOOK DRIVE	BANNING	CA	92220-5112	Shipped	USPS®93419	\$13.52	\$1.05	\$14.57
10/16/17	111-307070	A Wind in The House Of Islam: How God Is	Paperback	1	Visa - 9818	ill@banning	10/17/17	PATRON NAME	1251 BOOK DRIVE	BANNING	CA	92220-5409	Shipped	USPS®93419	\$14.59	\$1.13	\$15.72
10/18/17	111-158461	The Glitter Dome	Paperback	1	Visa - 9818	ill@banning	10/19/17	PATRON NAME	1252 BOOK DRIVE	BANNING	CA	92220-3436	Shipped	USPS®12X46	\$14.70	\$1.14	\$15.84
10/19/17	111-569923	A Memory of Violets: A Novel of London's	Paperback	1	Visa - 9818	ill@banning	10/20/17	PATRON NAME	1253 BOOK DRIVE	BANNING	CA	92220-7151	Shipped	USPS®93419	\$11.07	\$0.86	\$11.93
10/24/17	112-390252	Let's Go for a Drive! (An Elephant and Pigg	Hardcover	1	Visa - 9818	ill@banning	10/24/17	PATRON NAME	1254 BOOK DRIVE	WHITEWATE	CA	92282-3104	Shipped	SUREPOST1	\$8.99	\$0.70	\$9.69
10/24/17	111-931480	The Lance: The Project: Book Two	Paperback	1	Visa - 9818	ill@banning	10/25/17	PATRON NAME	1255 BOOK DRIVE	BANNING	CA	92220-4520	Shipped	USPS®93419	\$10.95	\$0.85	\$11.80
10/24/17	111-885803	90 Minutes in Heaven: A True Story of Dea	Paperback	1	Visa - 9818	ill@banning	10/26/17	PATRON NAME	1256 BOOK DRIVE	BANNING	CA	92220-1951	Shipped	USPS®93419	\$9.02	\$0.70	\$9.72
10/27/17	111-189406	On a Pale Horse (Incarnations of Immortal	Mass Mark	1	Visa - 9818	ill@banning	10/28/17	PATRON NAME	1257 BOOK DRIVE	BANNING	CA	92220-1868	Shipped	USPS®93419	\$7.99	\$0.62	\$8.61
10/27/17	111-678336	60 Ways to Lower Your Blood Pressure: W	Paperback	1	Visa - 9818	ill@banning	10/28/17	PATRON NAME	1258 BOOK DRIVE	BANNING	CA	92220-3607	Shipped	USPS®93419	\$8.92	\$0.69	\$9.61
10/30/17	111-053999	The Seventh Pillar: The Project: Book Thr	Paperback	1	Visa - 9818	ill@banning	10/31/17	PATRON NAME	1259 BOOK DRIVE	BANNING	CA	92220-4520	Shipped	USPS®93419	\$10.93	\$0.85	\$11.78
11/1/17	111-892500	The Widower's Wife: A Thriller	Hardcover	1	Visa - 9818	ill@banning	11/2/17	PATRON NAME	1260 BOOK DRIVE	BANNING	CA	92220-3441	Shipped	USPS®93419	\$17.67	\$1.37	\$19.04
11/1/17	111-777410	How to Make It: 25 Makers Share the Secr	Paperback	1	Visa - 9818	ill@banning	11/2/17	PATRON NAME	1261 BOOK DRIVE	BANNING	CA	92220-3200	Shipped	USPS®93419	\$18.10	\$1.40	\$19.50
11/1/17	111-312138	String Instrument Setups: 10 Setups That	Paperback	1	Visa - 9818	ill@banning	11/2/17	PATRON NAME	1262 BOOK DRIVE	BANNING	CA	92220-3200	Shipped	USPS®93419	\$12.34	\$0.96	\$13.30
11/1/17	111-531112	Man's Search for Meaning: Gift Edition	Hardcover	1	Visa - 9818	ill@banning	11/2/17	PATRON NAME	1263 BOOK DRIVE	BANNING	CA	92220-5482	Shipped	USPS®93419	\$18.16	\$1.41	\$19.57
11/2/17	111-282543	The Delta Star	Mass Mark	1	Visa - 9818	ill@banning	11/2/17	PATRON NAME	1264 BOOK DRIVE	BANNING	CA	92220-3436	Shipped	USPS®93419	\$7.99	\$0.62	\$8.61
11/6/17	111-555335	How to Make Your Band Sound Great: Mu	Paperback	1	Visa - 9818	ill@banning	11/7/17	PATRON NAME	1265 BOOK DRIVE	BANNING	CA	92220-3200	Shipped	USPS®93419	\$25.12	\$1.95	\$27.07
11/6/17	111-794409	Beautiful: All-American Decorating and Tl	Hardcover	1	Visa - 9818	ill@banning	11/7/17	PATRON NAME	1266 BOOK DRIVE	BANNING	CA	92220-3200	Shipped	USPS®93419	\$30.59	\$2.37	\$32.96
11/6/17	111-388414	Black Harvest: The Project: Book Four (Vol	Paperback	1	Visa - 9818	ill@banning	11/7/17	PATRON NAME	1267 BOOK DRIVE	BANNING	CA	92220-4520	Shipped	USPS®93419	\$9.95	\$0.77	\$10.72
11/7/17	111-814889	Autismo (Spanish Edition)	Paperback	1	Visa - 9818	ill@banning	11/8/17	PATRON NAME	1268 BOOK DRIVE	BANNING	CA	92220-3382	Shipped	USPS®93419	\$11.52	\$0.89	\$12.41
11/9/17	111-327436	How Now Shall We Live?	Paperback	1	Visa - 9818	ill@banning	11/9/17	PATRON NAME	1269 BOOK DRIVE	BANNING	CA	92220-4454	Shipped	USPS®93419	\$11.67	\$0.90	\$12.57
11/10/17	111-327436	Cold Tangerines: Celebrating the Extraord	Paperback	1	Visa - 9818	ill@banning	11/10/17	PATRON NAME	1270 BOOK DRIVE	BANNING	CA	92220-4143	Shipped	USPS®93419	\$11.81	\$0.92	\$12.73
11/13/17	111-938430	The Fever Code: Book Five; Prequel (The M	Hardcover	1	Visa - 9818	ill@banning	11/14/17	PATRON NAME	1271 BOOK DRIVE	BANNING	CA	92220-3770	Shipped	USPS®93419	\$15.19	\$1.18	\$16.37
11/15/17	111-105000	The Isle of the Lost: A Descendants Novel (	Paperback	1	Visa - 9818	ill@banning	11/16/17	PATRON NAME	1272 BOOK DRIVE	BANNING	CA	92220-5885	Shipped	USPS®93419	\$7.99	\$0.62	\$8.61



## Attachment H – Amazon Data Request Instructions

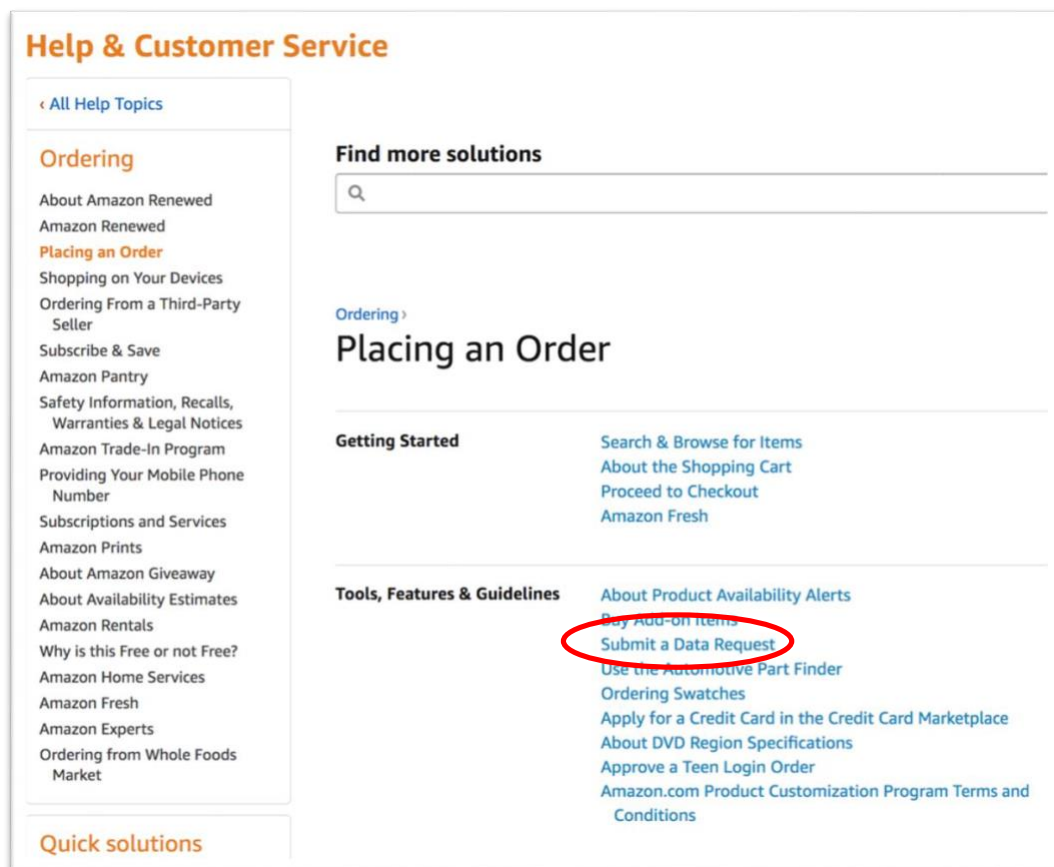
The following are instructions for retrieving an Order History report from Amazon using the Data Request function.

### Retrieving Amazon Order History Reports Using the Data Request Function

1. Go to the Help page on Placing an Order:  
[https://www.amazon.com/gp/help/customer/display.html/ref=hp\\_gt3\\_oths\\_placeo?no\\_deid=201889510](https://www.amazon.com/gp/help/customer/display.html/ref=hp_gt3_oths_placeo?no_deid=201889510)

If this link does not work, you can find the correct page by going to the Help page. Under “Browse Help Topics”, select “Other Topics & Help Sites”, then click on “Placing an Order”.

2. Click on “**Submit a Data Request**”.



The screenshot shows the Amazon Help & Customer Service page for "Placing an Order". On the left is a navigation menu with categories like "Ordering", "Getting Started", and "Tools, Features & Guidelines". The main content area is titled "Placing an Order" and lists various links. The link "Submit a Data Request" is circled in red.

**Help & Customer Service**

◀ All Help Topics

**Ordering**

- About Amazon Renewed
- Amazon Renewed
- Placing an Order**
- Shopping on Your Devices
- Ordering From a Third-Party Seller
- Subscribe & Save
- Amazon Pantry
- Safety Information, Recalls, Warranties & Legal Notices
- Amazon Trade-In Program
- Providing Your Mobile Phone Number
- Subscriptions and Services
- Amazon Prints
- About Amazon Giveaway
- About Availability Estimates
- Amazon Rentals
- Why is this Free or not Free?
- Amazon Home Services
- Amazon Fresh
- Amazon Experts
- Ordering from Whole Foods Market

**Quick solutions**

**Find more solutions**

Search

Ordering >

## Placing an Order

**Getting Started**

- Search & Browse for Items
- About the Shopping Cart
- Proceed to Checkout
- Amazon Fresh

**Tools, Features & Guidelines**

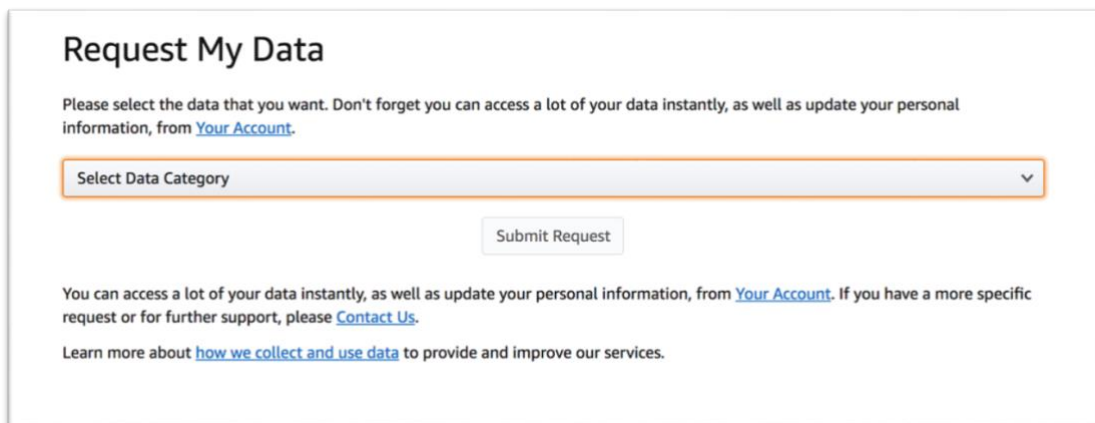
- About Product Availability Alerts
- Buy Add-on Items
- Submit a Data Request**
- Use the Automotive Part Finder
- Ordering Swatches
- Apply for a Credit Card in the Credit Card Marketplace
- About DVD Region Specifications
- Approve a Teen Login Order
- Amazon.com Product Customization Program Terms and Conditions



3. You will be prompted to log into your Amazon account. Be sure you are logged into your dedicated Zip Books Amazon account.

Note that you will need to have a phone number associated with your account to download your reports. Be sure that you have access to the phone number saved. You should NOT use a NorthNet phone number. You can find this info or set-up a number under “Your Account” > “Login & Security”. If no number is saved, you will be prompted to set one up when your reports are ready to download.

4. On the “Request My Data” page, click on the drop-down menu to select “Your Orders”. It is the first option listed.



**Request My Data**

Please select the data that you want. Don't forget you can access a lot of your data instantly, as well as update your personal information, from [Your Account](#).

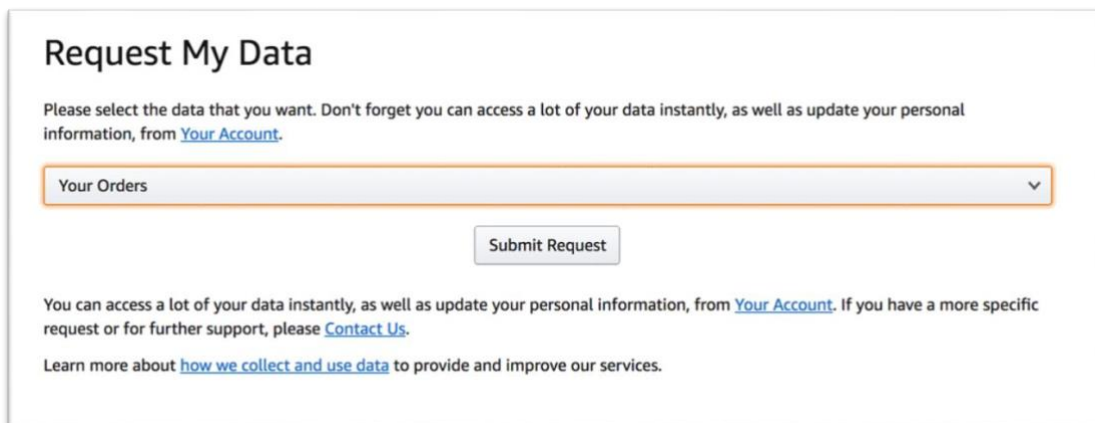
Select Data Category ▾

Submit Request

You can access a lot of your data instantly, as well as update your personal information, from [Your Account](#). If you have a more specific request or for further support, please [Contact Us](#).

Learn more about [how we collect and use data](#) to provide and improve our services.

5. After selecting “Your Orders”, click on “Submit Request”.



**Request My Data**

Please select the data that you want. Don't forget you can access a lot of your data instantly, as well as update your personal information, from [Your Account](#).

Your Orders ▾

Submit Request

You can access a lot of your data instantly, as well as update your personal information, from [Your Account](#). If you have a more specific request or for further support, please [Contact Us](#).

Learn more about [how we collect and use data](#) to provide and improve our services.

6. You will receive notification of your “**Data Request Creation**”. A confirmation email will also be sent to you with a link to “**Confirm Data Request**”.

## Data Request Creation



### Thank You. You're almost done...

Protecting your privacy and the security of your data is and always has been a top priority for Amazon. We've sent a confirmation link to your email which you will need to click in order to verify your request. Please note, this link will expire in 5 days. If you have any queries on this request, please [Contact Us](#).

You can access a lot of your data instantly, as well as update your personal information, from [Your Account](#). If you have a more specific request or for further support, please [Contact Us](#).

Learn more about [how we collect and use data](#) to provide and improve our services.

### Your Data Request Confirmation



We've received a request for your  
personal data

Hello,

Protecting your privacy and the security of your data is and has always been a top priority for Amazon, therefore click the **confirm** button below to verify your request.

Once we receive your confirmation, we will process your request.

**Confirm Data Request**

This link will be active for 5 days

7. You will receive a “**Data Request Confirmation**”. Note that they indicate the process can take up to a month to complete, but our reports were received in a few days.

### Data Request Confirmation

✓ **We've received and are processing your request to access your personal data.**

We will provide your information to you as soon as we can. Usually, this should not take more than a month. In exceptional cases, for example if a request is more complex or if we are processing a high volume of requests, it might take longer, but if so we will notify you that there will be a delay.

You can access a lot of your data instantly, as well as update your personal information, from [Your Account](#). If you have a more specific request or for further support, please [Contact Us](#).

Learn more about [how we collect and use data](#) to provide and improve our services.

8. Amazon will send you an email when your reports are ready to download. To download your reports, click on the provided “**Download Data**” link and log into your Zip Books dedicated Amazon account.

For security purposes, you will need to have a phone number associated with your account to download your reports. If you don't currently have a phone number associated with your account, you will be asked to add one after you sign into your account. If you don't want Amazon to retain this phone number, you can delete it from your account once you have accessed your data.

Your Data Request

## Your personal data is ready to download

Hello,

We are happy to confirm that we have completed your data request. Your data will be available to download for the **next 90 days**.

[Download Data](#)

 **Authentication required**

Protecting privacy and security of your data is and has always been a top priority for Amazon. To get access to your data, authentication with e-mail and password is required and to validate your identity a One Time Password (OTP) will be sent to your phone number via SMS or phone call.

If you don't currently have a phone number associated with your account, you will be asked to add one after your sign into your account.

If you don't want us to retain this phone number, you can delete it from your account once you have accessed your data. If you are experiencing any difficulties, please respond to this email.

- Once you have gained access to your account, you will be given various file options to download. The “Retail.OrderHistory.zip” file is the Order History report needed. However, there are also reports for returns, if needed for your own tracking purposes.

The reports will look different than the old order history reports and will include all orders going back to the start of your account. You will need to filter and sort the file to find your most recent orders. If you’re submitting an Order History report to the Fiscal Dept for review, we ask that you send only the data for the period requested.

### Download your Amazon data

Here are the files that you requested. The links will be available for 90 days, after which they will expire. Do not download your data on public computers or devices, or upload them where others can see them. For more information on the data provided, please visit the [Amazon & My Data Help page](#).

Files created on August 31, 2020 <span style="float: right;">^</span>		
Digital.Borrows.1.zip	3.83 KB	<a href="#">Download</a>
Retail.CustomerReturns.1.zip	662.00 bytes	<a href="#">Download</a>
Retail.OrderHistory.zip	36.24 KB	<a href="#">Download</a>
Retail.OrdersReturned.Payments.zip	584.00 bytes	<a href="#">Download</a>
Retail.OrdersReturned.zip	633.00 bytes	<a href="#">Download</a>
Subscriptions and Digital Order History_na.zip	10.08 KB	<a href="#">Download</a>
YourOrders.AmazonDeals.zip	484.00 bytes	<a href="#">Download</a>

You can access a lot of your data instantly, as well as update your personal information, from [Your Account](#). If you have a more specific request or for further support, please [Contact Us](#).

Learn more about [how we collect and use data](#) to provide and improve our services.

# Attachment I – Chrome Extension

The Amazon Order History Reporter, available for download at <https://bit.ly/3hiUxI5>, is a Chrome extension that can be used to generate an Order History report instead of Amazon's Data Request function. This report looks different but includes most of the information needed to assist with tracking.



chrome web store



Home > Extensions > Amazon Order History Reporter



## Amazon Order History Reporter

Offered by: philip

★★★★☆ 180 | Shopping | 20,000+ users

Overview

Reviews

Support

Related

order id	items	to	date	total	postage	gift	VAT
026-06619849	Thermoscan Braun Replacement Probe Cover For Thermometer, 150g(Pack of 4)		2020-02-27	£6.99	0		£1.17
026-08593637	USB Type C Cable, GIANAC [2-Pack/ 0.5M/1.6FT] Nylon Braided USB C Fast Charging and Sync Data Cable Cord for Samsung Galaxy S10/S8/S9 plus/Note		2020-02-02	£3.99	0		0
026-25370532	Bahco 228-S2-10P Junior Saw Blade Pack 10;		2020-02-12	£3.74	0		£0.62
026-33461858	Bahco 3906 Sandflex Pack 10 Hacksaw Blades 12 X 52;		2020-02-12	£8.34	0		£1.39
026-77371782	D'Addario EJ11-3D 80/20 12-53 Bronze Light Acoustic Guitar Strings;		2020-04-05	£29.12	0		£4.86



## Attachment J – Retrieving E-Statements

The following instructions indicate how to locate and download your monthly statements from your online credit line account. Procedures may be different due to changes to the website.

### Retrieving E-Statements from your Synchrony Online Account

1. Go to your Amazon.com Pay-In-Full Credit Line account at <https://commercial.syf.com/commercialgen2/login.do?subActionId=1000&clientId=amazon>

You can also use the link provided in the email notifying you that your e-statement is ready to view. E-Statements are usually ready for viewing on the 11<sup>th</sup> of the month.

- Log into your account using your User ID and Password. If it asks if you want to enroll in the Invoice Net Terms program, you want to ignore this request and close the pop-up window. You'll be taken to your "Account Overview" page. Note that you will be viewing your Primary account. Do NOT switch to your Zip Books account, as your e-statement can only be accessed from your Primary account at this time.

**amazon.com** Amazon Business Line of Credit

Welcome to the Online Credit Center

Contact Us Help Log Out

Account Overview Payments Account Management Account History View All Accounts

**\*Current Balance: \$0.00**

Available \$8,000.00  
Credit:  
\*\*Credit Limit: \$8,000.00

**Current Statement**

Outstanding Balance: \$0.00  
Last Amount Paid: \$815.49 on 10/01/20  
Days Past Due:

0 - 30:	\$0.00	91 - 120:	\$0.00
31 - 60:	\$0.00	121 - 150:	\$0.00
61 - 90:	\$0.00	151+:	\$0.00

Make a Payment View Electronic Statements  
View Payment History Enroll in Invoice Net Terms (INT)

Open Invoices Closed Invoices

No Invoices Present

We want to hear from you!  
How are we doing?

Shopping for work?  
Enjoy exclusive pricing, FREE Two-Day Shipping and more

Create a Free Account

amazonbusiness

3. Click on “View Electronic Statements” under the “Current Statement” info box. This option is only available from your Primary Account.

The screenshot shows the Amazon Business Line of Credit Online Credit Center dashboard. The page title is "Amazon Business Line of Credit" and "Welcome to the Online Credit Center". The user's account information is partially redacted with a blue box, showing "ALTURAS, CA 961013193". Navigation links include "Account Overview", "Payments", "Account Management", "Account History", and "View All Accounts".

The "Current Statement" section displays the following information:

- \*Current Balance: \$0.00
- Available Credit: \$8,000.00
- \*\*Credit Limit: \$8,000.00
- Outstanding Balance: \$0.00
- Last Amount Paid: \$815.49 on 10/01/20
- Days Past Due:
 

0 - 30:	\$0.00	91 - 120:	\$0.00
31 - 60:	\$0.00	121 - 150:	\$0.00
61 - 90:	\$0.00	151+:	\$0.00

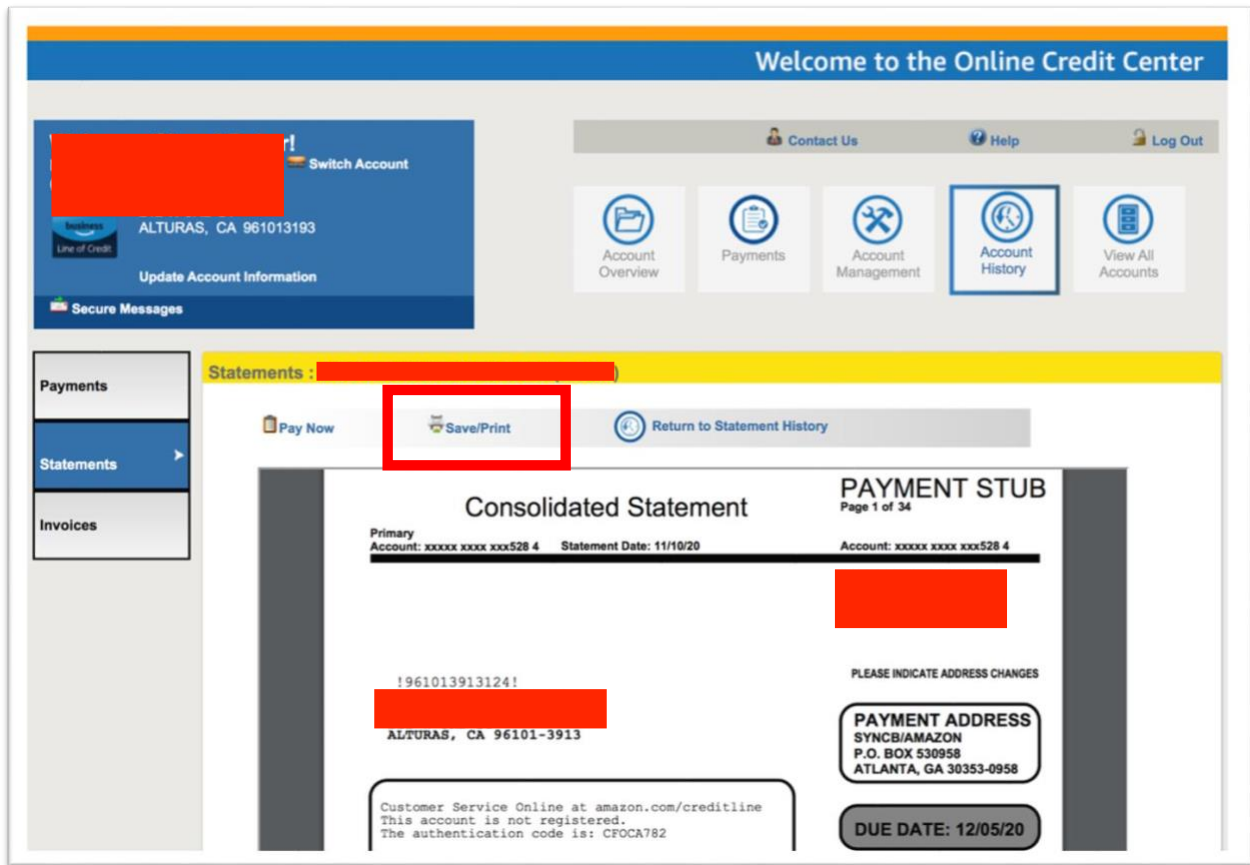
Below the statement, there are links for "Make a Payment", "View Payment History", and "View Electronic Statements". The "View Electronic Statements" link is highlighted with a red box. There is also a link for "Email an Invoice Request Terms (PDF)".

The "Open Invoices" and "Closed Invoices" tabs are visible, with "No Invoices Present" displayed below them. A sidebar on the right contains a "We want to hear from you!" section with a "How are we doing?" link, and a "Shopping for work?" section with a "Create a Free Account" button and the Amazon Business logo.

4. You will be taken to the Statements page where you will find a list of statements by date. Click on the most recent invoice or the invoice needed.

The screenshot shows the Amazon Business Line of Credit Online Credit Center. The page title is "Amazon Business Line of Credit" and "Welcome to the Online Credit Center". The user's account information is partially redacted with a red box, showing "ALTURAS, CA 961013193". The page features a navigation menu on the left with "Payments", "Statements", and "Invoices". The main content area is titled "Statements" and includes instructions: "Click the Statement Date to view the statement. Only statements processed after enrollment are available as Electronic Statements. Up to 12 months are available to view. If a statement is needed that is not listed, please use the Request a Paper Statement function." Below the instructions are two buttons: "Request a Paper Statement" and "Change Enrolled Email Address". A section titled "Available Statements - PRIMARY LIBRARY" contains a list of statement dates: 11/10/2020, 10/10/2020, 09/10/2020, 08/10/2020, 07/10/2020, 06/10/2020, 05/10/2020, 04/10/2020, 03/10/2020, and 02/10/2020. The date 11/10/2020 is circled in red.

- This will open up your e-statement in a window. Select the option to “Save/Print”. It will automatically download the file onto your computer. You should be able to find it in your “Downloads” folder saved as “Statement.pdf”. We recommend renaming the file using the following format to make it more identifiable: “Your Library Name 20XX MM 10” (for example, “Modoc 2020 11 10” for your statement dated 11/10/20).



- Attach the file to an email and send it to [ZipBooksInvoice@northnetlibs.org](mailto:ZipBooksInvoice@northnetlibs.org). You will receive a confirmation email from Adeline or Mercy verifying that the file has been received.

## Attachment K – Statistics Reporting Procedures

The most up-to-date Statistics Reporting Procedures can be found online at <https://northnetlibs.org/statistics-reporting/>

### Zip Books Statistics Reporting Procedures for FY20-21

*This is an overview of the statistics reporting procedures for all Zip Books libraries, including Zip Books items purchased with local library funds. The data provided will give us a better understanding of your library's Zip Books program and will be used in our reports to the California State Library. Instructions are provided below for each tab in the "FY20-21 Zip Books Statistics Reporting Form". This form can be found online at <https://northnetlibs.org/statistics-reporting/>.*

1. Individual libraries are responsible for developing and maintaining their own tool to internally track Zip Books. Sample tracking tools are shared online on the Zip Books website at <https://northnetlibs.org/policies-and-best-practices/>.
2. Statistics should be tracked from the 1<sup>st</sup> of the month to the last day of the month.
3. Use the provided Excel spreadsheet titled "FY 20-21 Zip Books Statistics Reporting Form" to compile your library's statistics for the month. Formulas have been built into the form to help your library track your growth over the fiscal year. You can also hover over the question cells to get additional notes on what data should be entered. You may need to scroll the page all the way to the left to see the notes pop-up. Cells with notes will have by a red triangle at the top right corner.
4. The statistics reporting form should be emailed to [nuesca@northnetlibs.org](mailto:nuesca@northnetlibs.org) by the 15<sup>th</sup> day of the following month. For example, July's statistics should be submitted by August 15<sup>th</sup>. Deadlines may be adjusted due to holidays or reporting schedules, and notification will be provided via email.

#### **Monthly Statistics**

5. If your library is using grant funds, only two statistics need to be reported each month: the running total of first-time Zip Books users and the number of Zip Books items added to the library collection that month.
6. Use the "MONTHLY Statistics" tab to report these statistics. Only use the other tabs if they apply to your library's situation.
7. Any comments or feedback received from patrons, such as those that would be captured in patron satisfaction surveys, can be included under Comments/Feedback. Library staff are also encouraged to provide feedback.



***Local Library Funded Statistics***

8. If your library is using local library funds to supplement your Zip Books program, we ask that you track and report those statistics separately on the “LOCAL LIBRARY FUNDED Statistics” tab. The only statistic that does not need to be tracked separately is the running total of first-time Zip Books customers served since launch. Since it is a running total for your program, the number reported for your local library funded statistics should be the same as it is on your regular monthly statistics.
9. If your library has chosen to expand the normal Zip Books parameters while using local library funds, we ask that you only report the numbers for items that comply with our established parameters. This means that DVDs, music CDs, e-books, and adult fiction best-sellers should not be counted and reported.
10. Libraries should refer to the “[Zip Books Procedures for Using Local Library Funding](https://northnetlibs.org/zip-books-resources/)” document for additional information regarding supplementing your Zip Books program. You can find this on the Invoicing page under Zip Books Resources (<https://northnetlibs.org/zip-books-resources/>).

***Optional Statistics***

11. Supplemental statistics no longer need to be tracked and reported. Note that April’s supplemental statistics for FY19-20 were cancelled due to COVID-19. Instead, these statistics are now optional and can be reported if your library already tracks this data as part of your normal procedures.
12. Use the “OPTIONAL Statistics” tab to report any supplemental statistics that you may track, such as the number of Zip Books items ordered by format or by category. You do not need to complete all the questions listed.

## Attachment L – Statistics Reporting Form

The following images show the different tabs included in the Excel spreadsheet that is used to report statistics each month, including “MONTHLY Statistics”, “LOCAL LIBRARY FUNDED Statistics” and “OPTIONAL Statistics”. The most updated Statistics Reporting Form can be found online at <https://northnetlibs.org/statistics-reporting/>

	A	B	C	D	E	F	G	H	I	J
1	<b>Zip Books Monthly Statistics</b> <small>(rev. 7/31/20)</small>		<i>Use this tab to report your monthly statistics, which should be tracked from the 1st to the last day of the month</i>							
2	<b>Library Name:</b> <b>Date Service Launched (first year):</b>		<b>Month:</b> July	<b>Month:</b> August	<b>Month:</b> September	<b>Month:</b> October	<b>Month:</b> November	<b>Month:</b> December	<b>Month:</b> January	<b>Month:</b> February
3	1 Running total of first-time Zip Books customers served since launch:									
4	2 Number of Zip Books added to library collection this month:									
5	3 Comments/Feedback (optional):									
6										
7										
8										
<div style="display: flex; justify-content: space-between; align-items: center;"> <span>←</span> <span>MONTHLY Statistics</span> <span>LOCAL LIBRARY FUNDED Statistics</span> <span>OPTIONAL Statistics</span> <span>+</span> </div>										

	A	B	C	D	E	F	G	H
1	<b>Monthly Statistics for Zip Books purchased with local library funds</b> <small>(rev. 7/31/20)</small>		<i>Use this tab to report your monthly statistics for <b>NON-GRANT-FUNDED</b> items, wh</i>					
2	<b>Library Name:</b> <b>Date Service Launched (first year):</b>		July	August	September	October	November	December
3	1	Running total of first-time Zip Books customers served since launch:						
4	2	Number of Zip Books ordered this month <small>(COUNT ONLY: items that comply with Zip Books parameters*)</small>						
5	3	Number of Zip Books added to library collection this month: <small>(COUNT ONLY: items that comply with Zip Books parameters*)</small>						
6	4	Total amount of library funds spent this month on Zip Books items: <small>(COUNT ONLY: items that comply with Zip Books parameters*)</small>						
7	5	Comments/Feedback (optional):						
			<div style="display: flex; justify-content: space-between; align-items: center;"> <span>←</span> <span>MONTHLY Statistics</span> <span>LOCAL LIBRARY FUNDED Statistics</span> <span>OPTIONAL Statistics</span> <span>+</span> </div>					

	A	B	C	D	E	F	G	H	I
1	<b>Optional Supplemental Statistics</b> <small>(rev. 7/31/20)</small>		<i>Use this tab to report your supplemental statistics. They are optional but can be reported.</i>						
2	<b>Library Name:</b> <b>Date Service Launched (first year):</b>		July	August	September	October	November	December	January
3	4	Total number of Zip Books requests received this month:							
4	5	Of the total number of Zip Books ordered this month, how many were:							
5		Regular print books							
6		Large print books							
7		Audiobooks							
8		Adult fiction/non-fiction							
9		Young adult and children's fiction/non-fiction							
10		Non-English language items							
11	6	Total staff time for Zip Books request processing only (in hours):							
12		[Note: only indicate the time spent processing Zip Books requests which includes any procedures completed before the Zip Book items are returned, do not include time spent on processing items after they are returned to your library or other Zip Books related activities such as cataloging or compiling/reporting statistics]							
13			<div style="display: flex; justify-content: space-between; align-items: center;"> <span>←</span> <span>MONTHLY Statistics</span> <span>LOCAL LIBRARY FUNDED Statistics</span> <span>OPTIONAL Statistics</span> <span>+</span> </div>						

## Attachment M – Zip Books Flowchart

*This simple flowchart was created by Lake County Library to give their staff a basic outline of the Zip Books order process from beginning to end.*

### Zip Books Flowchart—Lake County Library

This is a basic outline of the Zip order process.

Refer to the Zip instruction manual for full details.

1	Go to list of Zip requests	
2	Horizon: Does the patron have fines over \$10 or excess CKOs? No. Proceed below.	YES. Notify patron fines need to be paid or items returned before Zip request can be processed. Yes →
3	Horizon: Does the patron have 2 Zip books checked out?, or have had 5 this month? NO. Proceed below.	YES. Flag the new request as WAIT.
4	Horizon: Is the book available at any Lake County branch? NO. Proceed below.	YES. Request the book in Horizon for the patron. Inform patron that we aren't doing it as a Zip Book
5	Amazon: Is the book available in Amazon, preferably in Prime? YES. Proceed below.	NO. Suggest interlibrary loan to the patron.
6	Amazon: Is the price more than \$50.00 [book] \$75 [BOCD]? NO. Proceed below.	YES. Ask Zip admin for permission to order. APPROVED. Proceed to ordering. NOT APPROVED. Suggest interlibrary loan to the patron.
7	OCLC Connexion: Is there a bibliographic record for the book if it's not in Horizon?	NO. We can't order it unless it's a local author. ILL probably isn't an option either. Notify patron.
8	OCLC Connexion: Export the bib record.	
9	Amazon: place the order including a gift receipt with the Zip information, if Amazon offers that choice.	
10	Amazon: Save the Amazon invoice as a PDF. Use "Fill & Sign" -Write the branch assignment & call number on the invoice.	
11	Cataloging shortcut & Horizon: Import the bib record into Horizon.	
12	Horizon: Attach the book barcode to the bib record.	
13	Horizon: Check the book out to the patron.	
14	Horizon: when book is returned, determine if library will keep or decline. Process the keepers.	

## Attachment N – Staff Procedures

*The following are examples of procedural documents created by Kings County Library, Lake County Library, and Mendocino County Library in order to orient their staff on local processing procedures and policies, including cataloging.*

### How to request a Zip Book for a patron:

- Patrons must have their library card in hand.
- A valid Kings County Library Card with the code of KIAD, KICH, KIST only. An account in good standing is required (Less than \$5.00 in fines).
- Check Horizon for the title of book or audiobook to ensure that Kings County Library or any member of the San Joaquin Valley Library System does not own the book.
- No fee to request a Zip Book.
- Only one Zip Book may be requested at a time. A previous Zip Book must be returned and the survey completed before requesting another. No exceptions.
- Books may be requested in regular print format, large print format, or audiobooks on CD.
- Books costing over \$35.00, out-of-print books, books or audiobooks that were published within the last 12 months may not be requested as Zip Books.
- Patrons can keep Zip Book for 3 weeks. If the item is not returned, the patron will be charged the full amount of the item.
- Their Zip Book will be shipped directly to their house. A gift slip will be included. The gift slip will say: "Thank you for your request. After 3 weeks, please return this slip & book to the Kings County Library."
- Patrons may not request more than **two** Zip Books per month.
- Library patron must be present to place the order. We do not take Zip Books requests over the phone

Once the Zip Book order has been placed, put a note on the patron's account that a Zip Book has been ordered. This will remain until the book is returned.

## Returning Zip Books:

- The patron must return the item on or before the end of the three week check out time to staff at any Kings County Library Branch circulation desk with the Gift Slip in the book.
- The return of a Zip Book is not considered complete without the Gift Slip.
- Zip Books can **NOT** be returned in the Book Drop.
- Once the book has been returned and survey complete:
  - Delete the Zip Book note on the patron's account
  - Send the book in transit to Tamara at the Hanford Branch Library.
- Another Zip Book may be requested at that time.
- The Library decides whether to add the book to the collection or donate to the Friends of the Kings County Library.

**\*If a patron's request does not meet the requirements for Zip Books, encourage them to use regular ILL with a \$15.00 fee.**





## Lake County Library Zip Books Manual

April 2018

### Placing Amazon orders.

I usually place Zip orders once or twice a week, in a batch. To do a Zip order you need:

- The Zip requests Google spreadsheet online
- Amazon
- OCLC Connexion
- OCLC cataloguing utility [the “suitcase”]
- Horizon

In Zip Requests response Google forms spreadsheet, sort by PATRON NAME [click the upper left corner of the spreadsheet where the numbered rows and lettered columns join. Click the DATA menu. Choose Sort by COLUMN D. Each patron can have two active Zip requests, that is, items that are checked out to their cards.

### Patron Requests

Go through the list of patrons to see which patrons have unprocessed requests. Look up each patron in Horizon to check for fines and fees over \$10. Check to see if the patron has a Zip Book checked out. If the patron’s account is good and has no more than 1 Zip Book, you can place the Zip order in Amazon. You can spot Zip Books because the I-type shows as LZIP.

Check Horizon to see if the book is available there. If so, request it in Horizon for the patron. In the patron request spreadsheet, type HORIZON in the Status cell. Highlight the request details and choose Strikethrough to cross out the text. Fill the request detail cells with light orange. Do not delete the text; you might need to refer to the request in the future. Retain the request information for about 6 months because sometimes you will need to refer to it.

If the patron has Zip Books CKO, find the new request(s) in the spreadsheet, enter WAIT in the Status cell, and fill it with lime green.

If the patron has outstanding fines, fill the Status cell in turquoise. Type FINES in the Notes cell and fill with turquoise.

When the patron clears the fines or returns a Zip Book, you can fill the next request.

### Amazon Search

Go to Amazon. Search for the patron’s item.

If the item is in Amazon Prime and the price is under \$35, we can order it. If the item is \$35 or more, we have to email the Zip Books Project Coordinator to ask permission to order it.

If the item is not published yet, go to the patron spreadsheet and enter the projected publication date in the Notes cell and fill that request with turquoise. Type PENDING in the Status cell.

### OCLC Records

When we order something from Amazon, we also download the OCLC MARC record into Horizon. If there is no OCLC record we can't order the book UNLESS IT'S BY A LOCAL AUTHOR. [Sonoma County Library will do special cataloguing on those items] Find and export the OCLC record that matches the Amazon item. When you finish placing Amazon orders, import the OCLC records into Horizon.

### Amazon Ordering

Find the item. Select **Amazon Prime** copies only, \$35 or under. Select **new** items, **hard cover** if possible. Put it in the cart. Proceed to checkout. Choose the patron from the list of addresses, or add a new patron [look near the bottom of the page for the link.] Use the Zip Visa card [number xxxx in the password book] for existing patrons, or enter it for new patrons. Choose **Use this payment method**. Click on **Add a Gift Receipt**. Edit the text for the gift receipt:

*Dear Patron. Your ZIP BOOK ~TITLE~ is checked out on your library card and is due DATE 4 weeks from order date. The barcode is 25253000xxxxxx. Please return this note & the book to a library employee. From Lake County Library 263-8817.*

Get a barcode from the roll. Scan it into the gift receipt] [NOTE if the gift message is too long, the Save button will be grayed out. Delete some spaces and it should clear the problem.]

Place the Amazon order.

To print the invoice:

In Amazon-

1. Click Review or edit your order.
2. View or Print Invoice.
3. Print this page for your records.
4. Print.

Paper clip the barcode to the invoice.

- Get the **Call Number info from the OCLC online record** and write it on the invoice.
- Write the OCLC number on the invoice in case you need to refer to it later.

In the Zip spreadsheet, type ORDERED in the Status cell. Highlight and Strikethrough the text of the request details. Clear any colored fill.

### Horizon: Begin the processing.

Import the OCLC MARC records. In the Copy Item List create a new item using the barcode assigned to that book. **Change the record so the I-type is LZIP and use the real collection code.** Use the price that's on the invoice.

CKO to patron with the Zip barcode.

DETAILS.

**Horizon: Zip Books to finish processing.**

After patron returns the book, make sure book is checked in. Pull the Amazon invoice from the Zip Books file on the ILL processing cart.

[We do not process all Zip Books; not all mass-market paperbacks and graphic novels are automatically processed. Other items might not be useful for our collection. Christopher is the ultimate authority on that choice.]

In Horizon open the item record. Edit to change the I-type to L21DAY. *Books published within the last two years should go in the NEW collection.* Change the price to match the price on the book instead of the Amazon Prime price.

Attach the usual stamps and library labels. Put a Zip Book bookplate in the front of the book. Bookplate master is in the E drive LOCATION. Enter the Zip books in the Library Statistics spreadsheet.

**Zip Title Spreadsheet.** This is on the E Drive. It lists books ordered in the Zip Books, if they are accessioned, if the Zip bookplate has been applied.

**Other Zip Book tasks**

Check the Amazon orders on the Lake County Library Zip account regularly to make sure the books are being delivered to the patrons. You can see the tracking information. Follow up if the books are delayed. See How to Find Amazon Help below.

Check the **Zip Books Gmail** account regularly [lakelibzipbks@gmail.com, *fastlibros*]. Delete routine order confirmation/shipping/delivery emails. Watch for messages about delivery delays and problems and follow up as needed.

*Amazon Order reports. In Amazon create order reports to see how we're spending our allotment, see who is ordering, etc. Go to Account and Lists > Your Account > Ordering and shopping preferences > Download order reports*

**Amazon Invoices.** Go through the file of Amazon Zip invoices monthly to see if items are getting back to the library.

**How to find Amazon help.**

Amazon has a help desk but it's very well hidden. INSTRUCTIONS.

## MENDOCINO COUNTY STAFF INSTRUCTIONS

### ZIP BOOK INSTRUCTION

1. Previous zip return?
2. Does it qualify \$
3. Search in Horizon
4. Check account for mg borrower type and fees (\$10 or less)
5. Check address in Horizon – call if different
6. Add to cart
7. Check this is a gift (if avail)
8. Create new item in Horizon and add barcode, Title: \* (MENDO ZIP)
9. Double click item to edit due date
10. Type free personal message (if avail) highlight due date and add barcode
11. Order
12. Edit item w/send to Copy/Item list  
    Itype mzip, collection ill, checkin note “SEND BACK TO UKIAH (#\*)”
13. Add info to excel spreadsheet
14. Email note or call patron
15. File the email

### Amazon.com Gift Note

Thank you for your Zip Book request. This book is checked out to you (**barcode: \* ZIP**) and **due by \***. Please hand to library staff for them to check in. Enjoy! MENDOCINO COUNTY LIBRARY

Hello ^,

The Mendocino County Library has processed your Zip Book request today. The item ^ by ^ should be delivered via Amazon to your address within a few days. This item is checked out to your library account and is **due by ^**. *This item is subject to the usual library late fees and replacement costs.* Please return the item (with the enclosed packing slips if available) by handing it directly to staff at any branch of the Mendocino County Library. It may then be added to the county library collection or passed along to another Zip library. For more information, please contact [707-472-0143](tel:707-472-0143).

Zip Books is a grant project provided in partnership with the California State Library and the NorthNet Library System. It is supported by California Library Services Act funds.

Thank you and enjoy!

## Attachment O – Patron Notifications

*The following are sample patron notifications that can be sent by email, included in the Amazon order as a Gift Message, or sent by post.*

# Customer Zip Books Messages

## Amazon Gift Message

Thank you for your request. Another Zip Book item cannot be requested until returned. Thank you, Redwood City Public Library when finished, please return the enclosed item(s) to the staff at the downtown RCPL front desk.

## Email Message to Customer:

Thank you for requesting a Zip Book. Your item is expected to arrive on MONTH DATE, YEAR. Keep the item as long as you want. When you are finished with the item, return it to a staff member at the front desk of the Redwood City Downtown Library and let them know it is a Zip Book. The item will then be taken off your record and you may request an additional item (Total of 3 per month). **If the Zip Book is returned in the self-check or outdoor book returns it will not be removed from your account. You would be responsible for the whole cost of the item if you want to use the service again.**

*Zip Books is a grant project provided in partnership with the California State Library and the NorthNet Library System. It is supported by California Library Services Act funds.*

## Lake County Sample Gift Message



### A gift for you

Hi [REDACTED], Please return this note &  
your ZIP BOOK -FATAL SCANDAL-  
to a library employee. This book is  
checked out to you, due 12/19/19  
barcode35253002770398 LAKE From  
Lake County Library



Print Notice 1:

**Lake County Library Zip Book request information**

Your request for

\_\_\_\_\_ will be filled by a Zip Book that will arrive in your mail \_\_\_\_\_

The book is checked out to you for 4 weeks. Due date \_\_\_\_\_

Save the Amazon paperwork that comes with the book.

When you finish the book, return it and the Amazon note to a library circulation employee. Please tell the employee that it's a Zip Book.

~~ from the Lake County Library interlibrary loan department. 263-8817 x 17106

**Shipper is** \_\_\_\_\_

Print Notice 2:

**Unable to obtain the item you requested at the Lake County Library**

You recently requested this title through Zip Books.

\_\_\_\_\_.

The library is not able to get this for you.

- There is no Amazon Prime-eligible copy.
- The price exceeds the limit for a Zip book.
- Amazon does not carry it.
- Out of print.
- This item isn't published in the format you requested.

The library might be able to borrow this from another library through interlibrary loans. The request form is on the Lake County Library website. All interlibrary loan items are now charged a \$3.00 postage fee when they arrive in Lake County.

Lake County Library, 1425 N. High Street, Lakeport CA 95453. 707-263-8817

July 20, 2017

Lake County Library  
 Zip Book Department  
 1425 North High Street  
 Lakeport, CA 95453-3800  
 707-263-8817 ext 17106



TO  
 Patron  
 Address  
 City, state zip

Account Number

First Notice.

### Zip Book Overdue Notice

Your account is being charged for the following item.  
 This item is now overdue.

If you have any questions, please contact the library.

jmc

Item	
<p>Title</p> <p>Author</p> <p>Call Number</p> <p>Library Barcode</p> <p>Charges</p> <p>Due Date</p>	

**Lakeport Library**  
 1425 N. High Street  
 Lakeport CA, 95453  
 707-263-8817  
 Tue, Thu-Sat 10am-5pm  
 Wed 12n-8pm

**Redbud Library**  
 14785 Burns Valley Road  
 Clearlake, CA 95422  
 707-994-5115  
 Tue, Thu-Sat 10am-5pm  
 Wed 12n-8pm

**Middletown Library**  
 21267 Calistoga Road  
 Middletown CA, 95461  
 707-987-3674  
 Tue - Fri 1-6pm  
 Sat 10am-3pm

**Upper Lake Library**  
 310 2<sup>nd</sup> St.  
 Upper Lake CA, 95485  
 707-275-2049  
 Tue - Fri 1-6pm  
 Sat 10am-3pm

	Please return this notice and the book to a library employee.
--	---

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**Lakeport Library**  
1425 N. High Street  
Lakeport CA, 95453  
707-263-8817  
Tue, Thu-Sat 10am-5pm  
Wed 12n-8pm

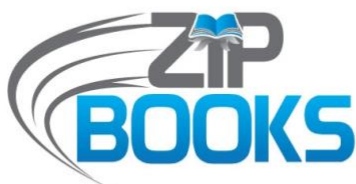
**Redbud Library**  
14785 Burns Valley Road  
Clearlake, CA 95422  
707-994-5115  
Tue, Thu-Sat 10am-5pm  
Wed 12n-8pm

**Middletown Library**  
21267 Calistoga Road  
Middletown CA, 95461  
707-987-3674  
Tue - Fri 1-6pm  
Sat 10am-3pm

**Upper Lake Library**  
310 2<sup>nd</sup> St.  
Upper Lake CA, 95485  
707-275-2049  
Tue - Fri 1-6pm  
Sat 10am-3pm

## Attachment P – Zip Books Returns Form for Staff

A return form such as this can be used by your library to assist with identify Zip Books returns that will need to be assessed to determine where they should go.



### FOR ZIP RETURNS - STAFF USE ONLY

(updated 9/22/15)

Please complete this portion and return it along with ZIP Book to *materials & collection development* at the Ukiah Library. Borrower's next request cannot be processed until this survey and returned ZIP Book are received.

Branch:

Date:

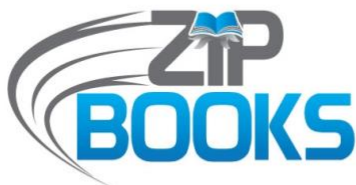
Patron Name:

Library Card #:

ZIP Book Title:

We would like to add this title to the collection

Patron would like to purchase ZIP Book if not added to another library's collection



### FOR ZIP RETURNS - STAFF USE ONLY

(updated 9/22/15)

Please complete this portion and return it along with ZIP Book to *materials & collection development* at the Ukiah Library. Borrower's next request cannot be processed until this survey and returned ZIP Book are received.

Branch:

Date:

Patron Name:

Library Card #:

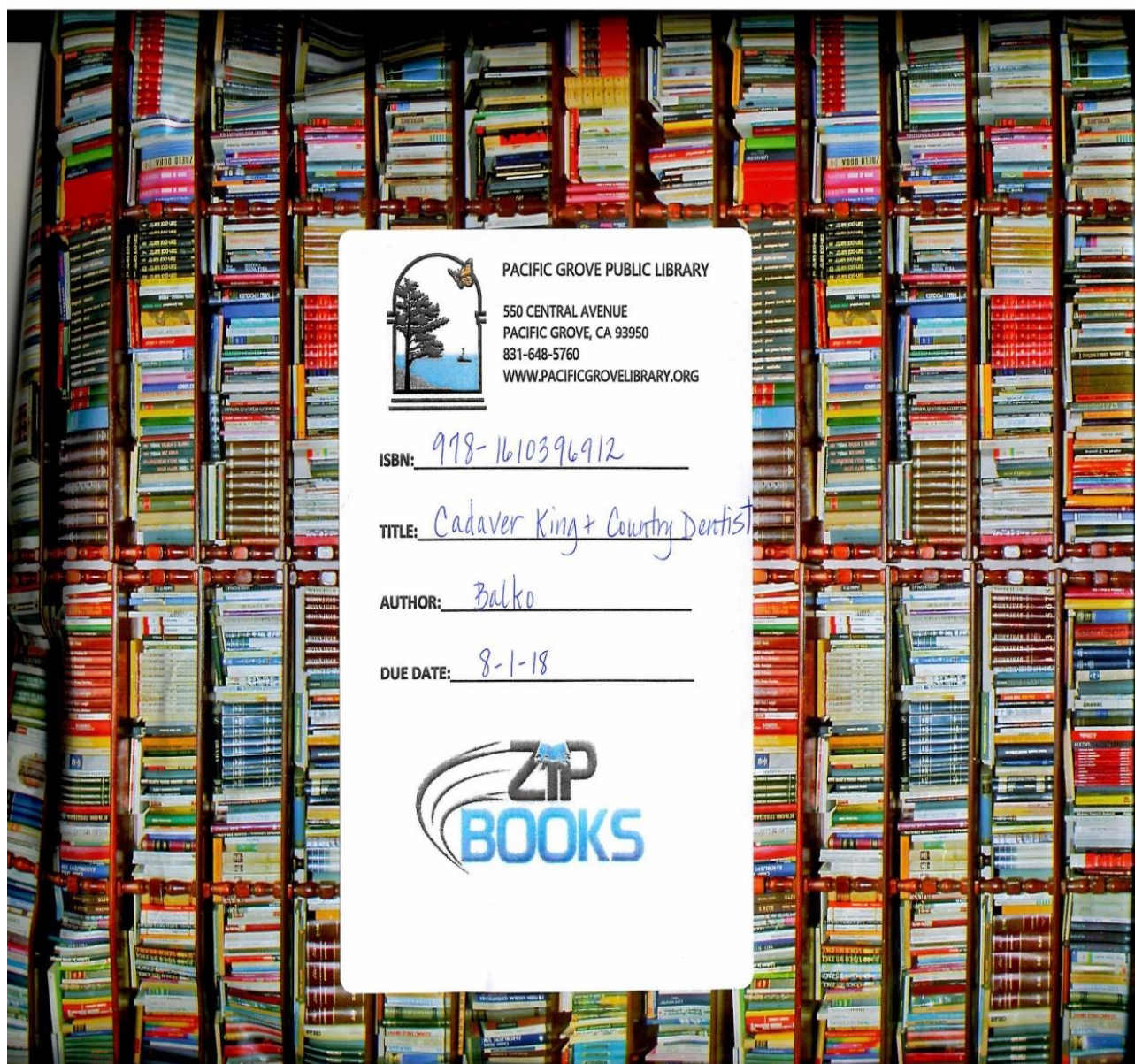
ZIP Book Title:

We would like to add this title to the collection

Patron would like to purchase ZIP Book if not added to another library's collection

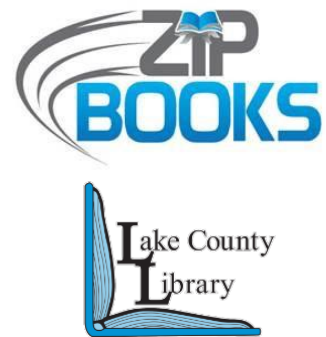
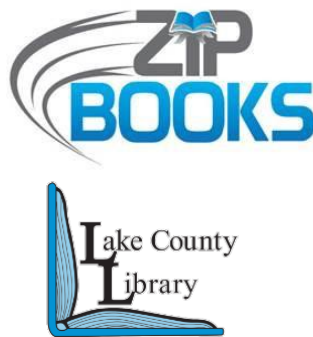
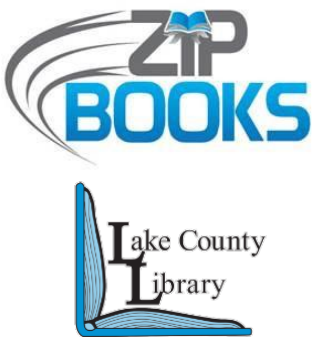
## Attachment Q – Zip Books Return Envelope

*This specially labeled return envelope, designed by Pacific Grove Public Library, is provided to patrons when they submit their requests in person. It serves to help both patrons and staff distinguish Zip Books items from regular library items.*



## Attachment R – Book Strap

The following is an example of a book strap created by Lake County Library to help identify Zip Books items to patrons that have arranged for their requests to be delivered to the library instead of their home address.



This Zip Book is checked out to:

---

This Zip Book is checked out to:

---

This Zip Book is checked out to:

---

The due date is

---

The due date is

---

The due date is

---

The library barcode is

---

The library barcode is

---

The library barcode is

---

**Please return this book to  
Lake County Library.**

**Do not remove this bookstrap.**

**Please return this book to  
Lake County Library.**

**Do not remove this bookstrap.**

**Please return this book to  
Lake County Library.**

**Do not remove this bookstrap.**