Send your vendor EDIFACT order information via email


Discover how to send your EDIFACT order information via email in WorldShare Acquisitions. When placing an order in WorldShare Acquisitions, you can notify the vendor of your order by sending them EDIFACT order information via email. The EDIFACT content will appear in the body of the email and as an attachment.

You must follow the instructions below before using the EDIFACT email method of notifying your vendor about your order. You have to configure these settings for every vendor you plan on notifying by this method. You need to have access to OCLC Service Configuration in order to complete all the steps. For information on creating an account, see Signing In.

Note: Most vendors require that you include the following information when you place an order: ISBN or ISSN for all order items and an Account Number.

Step 1: Contact your vendor

Before you begin configuration, you must contact the vendor in order to determine the correct EDIFACT notification settings:

- The vendor will provide what to put in the UNB Vendor Identifier and NAD Vendor Identifier fields.
- The vendor may also have recommendations for how your library should identify itself in the UNB Library Identifier and NAD Library Identifier fields. The vendor may require certain identifier types to be used, or they may provide you with the options they support.
- It is your library's responsibility to have a conversation with the vendor about your library identifier. If you hit a roadblock in the process, contact OCLC Support.

Step 2: Add vendor identifiers in Vendors

1. On the left navigation, click Vendors.
2. Search for the vendor you want to configure for the EDIFACT email method.
3. From the vendor search results, click the Vendor Name.
4. In the vendor record, click the Acquisitions Settings accordion.
5. In the Specific Notification Settings fields, set the following:
   a. In the Action list, select Ordering.
   b. In the Contact list, select your vendor contact who will be receiving the email. You can add contacts in the Vendors section of the vendor record.
   c. In the Delivery Method list, select E-Mail (EDIFACT).
d. Click Save.

6. In the Edifact Notification Settings fields, use the lists to select the type of identifiers provided to you by your vendor. You must select a value for all four fields:

   a. Depending on what you select for UNB Vendor Identifier and NAD Vendor Identifier, your next steps will vary.

<table>
<thead>
<tr>
<th>IDENTIFIER TYPE</th>
<th>ACTION</th>
</tr>
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</table>
   | SAN                      | 1. Click the Identifiers accordion.  
                            | 2. In the SAN field, enter the vendor identifier.                      |
   | GLN or ISIL              | 1. Click the Identifiers accordion.  
                            | 2. In the Additional Identifiers Type list, select GLN Global Number or ISIL International Standard for Libraries.  
                            | 3. In the Value field, enter the vendor identifier.                   |
   | Local Vendor ID          | The Local Vendor Number is assigned by the system. To view your vendor number, click the Local Identifiers accordion. |
   | Vendor-supplied ID or Library-supplied ID | Enter the identifier in the text field that appears on the right. |

   b. Depending on what you select for UNB Library Identifier and NAD Library Identifier, your next steps will vary.

<table>
<thead>
<tr>
<th>IDENTIFIER TYPE</th>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAN, GLN, or ISIL</td>
<td>Go to step 8.</td>
</tr>
<tr>
<td>WorldCat Registry ID</td>
<td>The WorldCat Registry ID is an identifier in the form of a running number which is assigned to all libraries and other cultural institutions within the WorldCat Registry. To view your WorldCat Registry ID, log into OCLC Service Configuration, and click WorldCat Registry &gt; Identifiers.</td>
</tr>
<tr>
<td>Vendor-supplied ID or Library-supplied ID</td>
<td>Enter the identifier in the text field that appears on the right.</td>
</tr>
</tbody>
</table>

7. Click Save.
8. If you selected SAN, GLIN, or ISIL for your UNB Library Identifier or NAD Library Identifier, continue to the steps below to configure your library identifier. Otherwise you can begin using the EDIFACT email method (see Step 4: Send the order).

Step 3: Add library identifiers in OCLC Service Configuration

If your UNB Library Identifier or NAD Library Identifier is a SAN, GLN, or ISIL, you must configure your library identification in OCLC Service Configuration.

1. Sign in to Service Configuration.
2. On the left navigation, click WorldCat Registry > Identifiers.
3. Select your Identifier Type from the list.
4. Enter your Identifier in the text field.
5. Click Add.
6. Click Save.
7. You can begin using the EDIFACT email method.

Step 4: Send the order

1. Create your order for the vendor and add line items using your normal method.
2. Select an ISBN or ISSN for each item on the order.
3. Select the appropriate Account Number.
4. Click Place Order.
5. On the Place Order window, make sure the Notify Vendor about this order check box is selected.
6. Click Continue.
7. Click Place & Send Order.