Create a new vendor for use with Acquisitions

Create a new vendor to use with your WorldShare Acquisitions workflows. Ideally, another library has already created the vendor you need. Before creating a vendor, search for a vendor to make sure the vendor does not already exist.

Search for a vendor

1. On the left navigation, click **Vendors**.
2. From the list, select the index to search. You can search by:
   - **Keyword**: Words in any of the indexes
   - **Vendor Name**: Words in the vendor name
   - **Location**: Words in the vendor's address
   - **Contact Name**: Words in the contact name
3. Type the search term in the text box. Tips:
   - Start or end searches with an asterisk (*) to increase your results. For example:
     - *rown retrieves both brown and crown
     - cop* retrieves both copy and copies
     - (*) Searching with only an asterisk (*) retrieves all possible results
4. Click **Search** or press <Enter>.
   - Previous searches appear below the **Search** button. Click a search to return to it
   - If the search results extend to two or more screens, use the navigation links (top and bottom of list) to move between screens. Screen headers and footers show your position within the list. For example: Results 11-20 of 56
5. On the Search results screen, click the name of the vendor to open the vendor record.

Filter results by In Use or Not in Use

Use the drop-down list in the upper right corner of the screen to filter results by In Use or Not in Use. These statuses have the following meanings:

- In Use (✔): You can initiate transactions with vendor
- Not in Use (Ø): You cannot initiate transactions with vendor. The vendor will not appear as an option anywhere in the system
### Columns in search results

Search results are sorted alphabetically by vendor name. To change the sort order, click on **Vendor Name**.

Some columns need explanation:

- **My Library Partner:**
  - Checked box: the vendor is in use
  - Unchecked box: the vendor is not in use

- **Private/Public:** Icons indicate whether vendor information is shared or not
  - Public/Published (🌐): A globe indicates that vendor information that is available to any library (as a result of it being published by a library). Note: In the General and Identifiers categories, if a library overwrites a field, the field is no longer shared, but the Globe icon remains unchanged.
  - Private/Not published (🏡): A house indicates that vendor information that is private and available only to your library (not published).
  - Some public and private (🌐🏡): Both a globe and a house indicate that within Addresses and Contacts, some information is public and some is private.

### Create a vendor

Ideally, another library has already created the vendor you need. Before creating a vendor, do a [Search for a vendor](https://help.oclc.org/Library_Management/WorldShare_License_Manager/Vendors/Create_a_new_vendor_for_us...).
make sure the vendor does not already exist. Only create a vendor if the vendor does not already exist. To create a new vendor:

1. In the left navigation, click **Vendors > New Vendor**.
2. Fill in the relevant fields in the sections that make up the vendor information (General, Links & Logins, Addresses, Contacts, etc.). Follow local practice. Most fields are self explanatory.
3. When finished, scroll to the upper-right corner of the screen and click **Save**.
4. To share the vendor with other libraries, click **Publish**. 
   Note: A vendor must be saved before it can be published.

### Complete the Vendor Fields

**Note:**

- Asterisks (*) indicated required fields.
- All vendor fields have a character limit of up to 255 characters.

#### General

If you have published this vendor (shared it globally), any edits to General information affect all libraries using this vendor.

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Country</td>
<td>The country of the vendor.</td>
</tr>
<tr>
<td>Vendor name*</td>
<td>The name of the vendor.</td>
</tr>
<tr>
<td>Roles</td>
<td>The role the vendor plays for libraries. Click <strong>Show Options</strong> to select a role.</td>
</tr>
<tr>
<td>Language</td>
<td>The language spoken by the vendor.</td>
</tr>
<tr>
<td>Relationships</td>
<td>Use to indicate relationships between different companies, units within a company, or other corporate relationships (distributor, etc.).</td>
</tr>
</tbody>
</table>

#### Links & Logins

List URLs to vendor services/products, along with User IDs and passwords, if needed.

Some fields need explanation:
### Active (check box) (only editable after saving)
- **Checked:** Contact is relevant to library
- **Unchecked:** Use to indicate contact is no longer relevant

### Addresses
- **Active (check box)**
  - **Checked:** Contact is relevant to library
  - **Unchecked:** Use to indicate contact is no longer relevant
- **Address role**
  - Use to indicate the kind of address. Click **Show Options** to select a role.

### Contacts
- **Active (check box)**
  - **Checked:** Contact is relevant to library
  - **Unchecked:** Use to indicate contact is no longer relevant
- **Allocated address**
  - An address allocated to a contact.
- **Short name**
  - Name preferred by contact.

### Partner Exchange Services (upload files)
For information on uploading files, see [Import](https://help.oclc.org/Library_Management/WorldShare_License_Manager/Vendors/Create_a_new_vendor_for_us…).

### Identifiers
List vendor's tax numbers, main URL, previous or alternate names, as well as other additional identifiers.

### Local identifiers
These identifiers are unique to your library.
<table>
<thead>
<tr>
<th>LOCAL IDENTIFIER</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accountancy System ID</td>
<td>Used to track the identifier used by your parent institution's financial system. OCLC recommends using this field for your enterprise resource planning (ERP) system.</td>
</tr>
<tr>
<td>GST Registration Number</td>
<td>A unique, 15-digit identification number issued to a business registered under the Goods and Services Tax (GST) on the basis of the PAN number of the business. The last digit is a checksum number.</td>
</tr>
<tr>
<td>ILS Supplier Number</td>
<td>Used to track the identifier used by your previous ILS.</td>
</tr>
<tr>
<td>Match Codes</td>
<td>Used when a code is needed to identify (match) vendors in other systems. Using the same match code for the same vendor in both WMS and other systems facilitates sharing vendor information between systems.</td>
</tr>
<tr>
<td>PST Registration Number</td>
<td>A unique, 11-character identification number (e.g., PST-1234-5678) issued to a business registered under the Provincial Sales Tax (PST).</td>
</tr>
<tr>
<td>Vendor number*</td>
<td>An ID number assigned by your instance of WMS, in the same way order numbers are assigned.</td>
</tr>
</tbody>
</table>

**Bank Account Info**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name of Financial Institution</td>
<td>The name of the financial institution associated with the vendor.</td>
</tr>
<tr>
<td>Location of Financial Institution</td>
<td>The location of the financial institution associated with the vendor.</td>
</tr>
<tr>
<td>Payment Recipient</td>
<td>The name of the payment recipient for the vendor.</td>
</tr>
<tr>
<td>Bank Code</td>
<td>The numeric code assigned by the central financial institution to all of its licensed member banks or financial institutions.</td>
</tr>
<tr>
<td>Account Number</td>
<td>A unique number of several (often eight or nine) digits used to identify the account at a financial institution.</td>
</tr>
<tr>
<td>Bank Identifier Code (BIC) / SWIFT codes</td>
<td>A unique identification code for both financial and non-financial institutions assigned by the Society for</td>
</tr>
</tbody>
</table>
International Bank Account Number (IBAN)

An internationally-established unique number consisting of up to 34 alphanumeric characters comprising: a country code; two check digits; and a number that includes the domestic bank account number, branch identifier, and potential routing information.

Customer/Account Numbers

Numbers used to indicate how orders are handled (monograph, serials, rush handling, children's materials, etc.)

Acquisitions Settings

Some settings need explanation:

<table>
<thead>
<tr>
<th>ACQUISITIONS SETTING</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Currency</td>
<td>The currency of the vendor.</td>
</tr>
<tr>
<td>Default Contact</td>
<td>The default contact of the vendor.</td>
</tr>
<tr>
<td>Default Delivery Method</td>
<td>The default delivery method of the vendor.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>NOTIFICATION SETTING</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
<td>The actions you want to be notified about.</td>
</tr>
<tr>
<td>Contact</td>
<td>The vendor staff person who provides the notification.</td>
</tr>
<tr>
<td>Delivery Method</td>
<td>The method the vendor staff person uses to notify you.</td>
</tr>
</tbody>
</table>

Watch a video

Manage vendors (13:37)

This video shows how to search, edit and create new vendors in WorldShare Acquisitions.
Media, iframe, embed and object tags are not supported inside of a PDF.