Information about upcoming changes to OCLC invoicing

Last updated: Fri, 17 Jan 2020 16:28:08 GMT

Read frequently asked questions about upcoming changes as OCLC implements a new back office system to better serve you.

In the next few months, OCLC will implement new back office systems to better serve you. The new system will ensure that OCLC has consistent global processes, giving OCLC libraries a more streamlined experience. We want to highlight some changes and timing that will be important to you and your institution.

Invoice

How is the new invoice different?

Small changes in the invoice format will begin with your December invoices. Below is an example invoice to highlight the changes you will see.
How is the invoicing changing for IFM transactions?

If your library subscribes to WorldShare ILL and uses the ILL Fee Management (IFM) service, you will receive subscription invoices and IFM activity invoices separately in the future. In the months your IFM activity results in a credit, you will receive a credit memo rather than an invoice.
What are my options for applying my IFM credits or requesting a refund?

Your institution can communicate with the [OCLC Accounts Receivable](https://help.oclc.org/Librarian_Toolbox/Ordering_and_billing/Understand_your_invoice) team about how and when you would prefer to apply the credit memo to your account or to receive a refund.

Will the timing of my subscription invoices change?

Yes. All invoices will now be dated/sent on the first day of the subscription period.

Where can I view my invoices or get a copy of past invoices?

All invoices starting January 2020 will arrive as a PDF attachment emailed to your designated billing contact(s). To update your contact information, please use the [OCLC member contact form](https://help.oclc.org/Librarian_Toolbox/Ordering_and_billing/Understand_your_invoice). If you did not receive your invoice, you will need to add OCLC email addresses to your "safe sender" list.

Invoices sent prior to January 2020 will be available on the Online Service Center (OSC). As part of implementing the new system, the OSC will be decommissioned on June 30, 2020. Once the new system goes live, you will see changes in the functionality of the OSC. While you will continue to be able to access past OCLC invoices, new invoices will not be available for viewing or downloading.

A new portal for invoices and statements will be available later in 2020. In the interim, please submit all requests to the [OCLC Accounts Receivable](https://help.oclc.org/Librarian_Toolbox/Ordering_and_billing/Understand_your_invoice) team.

**Billing**

How do I change my billing frequency to annual?

If you would like to change from monthly to annual invoices, please contact the [OCLC Orders](https://help.oclc.org/Librarian_Toolbox/Ordering_and_billing/Understand_your_invoice) team. New orders are automatically set up with annual billing frequency.

What should I do if my library requires a purchase order (PO) in order to pay an OCLC invoice?

In order for the purchase order number to be included on your invoice, you will need to supply it to the [OCLC Orders](https://help.oclc.org/Librarian_Toolbox/Ordering_and_billing/Understand_your_invoice) team prior to the renewal date.

My organization is tax-exempt and was charged taxes on our new invoice. What should I do?

If your invoice incorrectly includes tax, please contact the [OCLC Accounts Receivable](https://help.oclc.org/Librarian_Toolbox/Ordering_and_billing/Understand_your_invoice) team.

**Customer information**
How do I update my contact information? Can I have specific contacts for different products?

Use the OCLC member contact form to update your contact information and provide specific product contacts. OCLC is also now collecting general Accounts Payable contacts for easier communication in invoicing and collection activity.

What is my new customer ID?

Your new customer ID was communicated in a recent letter. If you do not have this information, please contact the OCLC Orders team. Each library or organization will receive a new customer ID that will be referenced on the invoices sent to your organization. Your OCLC symbol will not change.

Product identification

Where can I find the new product descriptions and new product codes?

OCLC product identification—product codes and descriptions—are changing. The new item codes are now all numeric. The new invoices will reflect your subscription service dates and the billing period for each subscription, rather than having those reflected by the product codes. An example of the change appears below. To access the complete list of new codes and descriptions, download the product code mapping spreadsheet.

<table>
<thead>
<tr>
<th>Current Product Code and Description</th>
<th>New Item Code and Item Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>FIX9835 Cataloging and Metadata Subscription—annual</td>
<td>3000030 Cataloging and Metadata Subscription</td>
</tr>
<tr>
<td>FIX9839 WorldShare ILL Subscription—annual</td>
<td>3000065 WorldShare ILL</td>
</tr>
<tr>
<td>DPR6764 CONTENTdm AMA CONTENTdm Level 1 License - 10,000 Items AMA</td>
<td>3000212 CONTENTdm Annual Agreement</td>
</tr>
</tbody>
</table>

Renewal communication

Are there any changes to renewal communication?

OCLC will be providing your renewal information 80 days in advance of your renewal date. This communication will be sent via email to your designated contact(s). Renewal notices will no longer include the name of the products and services in the subject line of the email. OCLC will use the existing contact information we have for your library. If you would like to update your subscription contact information for either the invoice or the renewal, please use the OCLC member contact form.

If you did not receive your invoice, you will need to add OCLC email addresses to your “safe sender” list.

Below is an example of a new renewal notice that you will receive.

https://help.oclc.org/Librarian_Toolbox/Ordering_and_billing/Understand_your_invoice

Printed: Mon, 23 Mar 2020 16:09:00 GMT
Renewal

Your Institution Name
JOHN DOE
Library Director
Your Library
1234 Your Street Dr.
City, ST 12345
United States

<table>
<thead>
<tr>
<th>Item Code</th>
<th>Item</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>3000085</td>
<td>Eproxy Hosted</td>
<td>$3,900.00</td>
</tr>
</tbody>
</table>

Total $3,900.00

We appreciate your subscription to OCLC services and hope you are pleased with the service and the support you have received during the past year. Your subscription(s) will automatically renew on 1/15/2020.

If you wish to continue your subscription as is, with no changes, no action is required by you at this time. If you wish to change or cancel your subscription(s) please contact OCLC Order Services at orders@oclc.org. Your renewal order number is 100000085. Please note that we require written confirmation for cancellations requests. If your institution requires a PO, please provide the new details to OCLC prior to your renewal date.

If you have any questions about this service or need help using it, please contact OCLC support in your region at http://oclc/support.

Thank you
OCLC Order Services

THIS IS NOT AN INVOICE. An invoice will follow in the usual billing cycle.

* Please note prices are current as of the date of this notice and are subject to change.

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