Request a quote

Discover how to request a quote from a vendor for items that you are considering for purchase in WorldShare Acquisitions.
You can send a quote request to a vendor for items that you are considering for purchase. This will allow you to get firm prices from the vendor for expensive items, such as e-resources, prior to ordering. When you request a quote, the system generates an email or print out of the order information that you can send to the vendor. Quote requests can only be generated from open orders. Once you request a quote for an open order, the order's Status changes to Open - Quote Requested.

1. Create an order, or find an open order to send for a quote request. See Search and filter orders.
2. At the top of the screen, click Request Quote.
3. On the Request Quote window, fill in the fields:
   a. In the Method field, select the method you want to use to notify the vendor (print or email).
   b. In the To field, select the vendor contact. You can set a default method and vendor contact by editing the Acquisitions Settings in the vendor record. For more information, see Acquisitions Settings.
   c. In the Reply to field, select the library contact. This is the person at your library who the vendor can contact about the quote request.
      Note: The default is the first person listed in the OCLC WorldCat registry for your library.
      (Optional) Change the Reply to contact.
         1. If you want to change the library contact, you can click Change to select a different contact person.
         2. Click the Choose field to search through all users. Use the text field to search for a name, or select a name from the list.
         3. Click a name in the list to make them the library contact.
4. If you selected Print as the method:
   a. Click Continue.
   b. On the Print Preview window, click Print Request Quote.
   c. The quote request prints. Go to step 6.
5. If you selected Email (HTML) as the method:
   a. (Optional) Select the Preview email before sending check box to view the email before sending it to the vendor. Click Continue.
   b. Click Send Quote Request.
6. A confirmation message appears and the order's status is updated to Open - Quote Requested.