Place an order

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Discover how to locate, place, and resend an order in WorldShare Acquisitions.

Search for Order

Locate the open order you want to place. For details see View and edit an order.

1. On the left navigation, click Orders > Orders.
2. Click Search to view all orders.
   Or
   From the drop-down list, select an index and enter the search term(s) in the box. Click Search.
   ◦ Results are sorted alphabetically by name.
   ◦ Use the Vendor, Order Type, Order status filters if required.
   ◦ To change the sort order, click any column heading.
3. Click the Order Name or Order # to view or edit the order or plan. For details, see View and edit an order.

(Placing orders cannot be done from a plan. Plans automatically have the status Placed.)

Place order

Open the order you want to place, complete any edits, and click Save Order at the top of the screen:

1. At the top of the screen click Place Order.
2. In the Place Order window, follow local practice to determine whether you check the box to notify the vendor about this order.
   ◦ Yes - Place order and notify the vendor
     a. Select the check box.
     b. Click Continue.
     c. Go to step 3.
   ◦ No - Place order, but do not notify the vendor
     a. Do not check the box.
     b. Click Place Order.
3. In the Notify Vendor about Order window, fill in the following fields:
   a. Method - The method you choose to notify the vendor of the order.
      i. E-Mail (EDIFACT): Send an EDIFACT order message via email. Before using this method, read Send your vendor EDIFACT order information via email for information on configuration.
      ii. E-Mail (HTML): Send your order via email.
      iii. Print: Print your order to send via mail.
b. **Reply to** - The person at your library that the vendor can contact about your order. The default is the first person listed on the Contacts page in OCLC Service Configuration (WorldCat Registry > Contacts). 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. **To** - The person at the vendor who will receive your notification of an order.

4. The method you choose determines the next step.

   a. **Email (EDIFACT and HTML)**
      
      i. *(Optional)* To preview the email, select **Preview email before sending** and then click **Continue**.
      
      ii. Click **Place & Send Order**.
   
   b. **Print**
      
      i. Click **Continue**.
      
      ii. From the Print Preview dialog, click **Place & Print Order**.

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**Resend order**

1. Open the order you want to resend and complete any edits.

2. Click **Resend Order**.

3. From the Notify Vendor about Order dialog, fill in the following fields:

   a. **Method** - The method you choose to notify the vendor of the order.
      
      i. **E-Email (HTML)**: Send your order via email.
      
      ii. **E-Mail (EDIFACT)**: Send an EDIFACT order message via email. Before using this method, read **Send your vendor EDIFACT order information via email** for information on configuration.
      
      iii. **Print**: Print your order to send via mail.

   b. **To** - The person at the vendor who will receive your notification of an order.

   c. **Reply to** - The person at your library that the vendor can contact about your order. The default is the first person listed on the Contacts page in OCLC Service Configuration (WorldCat Registry > Contacts). You can set a default method and vendor contact by editing the Acquisitions Settings in the vendor record. For more information, see Acquisitions Settings.

4. The method you choose determines the next step.

   a. **Email (HTML or EDIFACT)**
      
      1. *(Optional)* To preview the email, select **Preview email before sending** and then click **Continue**.
      
      2. From the Print Preview dialog, click **Send Order**.
   
   b. **Print**
      
      i. Click **Continue**.
      
      ii. From the Print Preview dialog, click **Place & Print Order**.

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**Watch a video**

Review, edit and place an order (8:07)

This video shows how to find an open purchase order, review and edit fields on the order and place the order in...
WorldShare® Acquisitions.

Media, iframe, embed and object tags are not supported inside of a PDF.

Reinforce your understanding with a practice exercise: Order Monographs