Discover how to create a new vendor in WorldShare Acquisitions.

Create a vendor

Ideally, another library has already created the vendor you need. Before creating a vendor, do a Search for a vendor to 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 Show Options 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</td>
</tr>
<tr>
<td>FIELD</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>-------</td>
<td>-------------</td>
</tr>
<tr>
<td></td>
<td>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:

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
</table>
| Active (check box) (only editable after saving) | Checked: Contact is relevant to library  
|        | Unchecked: Use to indicate contact is no longer relevant |

**Addresses**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
</table>
| 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**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
</table>
| Active (check box) | Checked: Contact is relevant to library  
<p>|        | Unchecked: Use to indicate contact is no longer relevant |
| Allocated address | An address allocated to a contact. |</p>
<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short name</td>
<td>Name preferred by contact.</td>
</tr>
</tbody>
</table>

**Partner Exchange Services (upload files)**

For information on uploading files, see [Import](https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Vendors/Create_a_new_vendor).

**Identifiers**

These identifiers are unique to the vendor.

<table>
<thead>
<tr>
<th>IDENTIFIER</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>URL</td>
<td>The Uniform Resource Locator (URL) value(s) for the vendor.</td>
</tr>
<tr>
<td>Tax Number</td>
<td>The tax number(s) for the vendor.</td>
</tr>
<tr>
<td>Previous Vendor Name</td>
<td>The previous name(s) for the vendor.</td>
</tr>
<tr>
<td>Alternate Vendor Name</td>
<td>The alternate name(s) for the vendor.</td>
</tr>
<tr>
<td>FEIN</td>
<td>The Federal Employer Identification Number (also known as Federal Tax Identification Number) is a nine-digit number issued by the Internal Revenue Service to track a business's tax returns.</td>
</tr>
<tr>
<td>SAN</td>
<td>The Standard Address Number (SAN) is a seven-digit numeric identifier used to identify organizations and businesses interacting with the publishing industry (including book and serial manufacturers, libraries, publishers.)</td>
</tr>
<tr>
<td>OCLC Symbol</td>
<td>The three or five-character code assigned by OCLC to identify a member institution.</td>
</tr>
<tr>
<td>Additional Identifiers</td>
<td>Select an additional identifier from the Type drop-down list and then enter the associated value.</td>
</tr>
<tr>
<td>IDENTIFIER</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>------------</td>
<td>-------------</td>
</tr>
<tr>
<td>GLN Global Location Number</td>
<td>A number used to uniquely identify a physical, functional, or legal entity. This number is also referred to as the International Location Number (ILN).</td>
</tr>
<tr>
<td>ILN International Location Number</td>
<td>A unique number used to identify a physical, functional, or legal entity.</td>
</tr>
<tr>
<td>ISIL International Standard Identifier for Libraries</td>
<td>A unique identifier assigned to libraries and related organizations, such as archives and museums, by the International Standard Identifier for Libraries and Related Organizations (ISIL), ISO 15511.</td>
</tr>
<tr>
<td>MARC Marc Organisation Code</td>
<td>A short alphabetic code used to represent names of libraries, organizations, and institutions that need to be identified in cataloging and in bibliographic control. See <a href="https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Vendors/Create_a_new_vendor">MARC Code List for Organizations</a> for more information.</td>
</tr>
<tr>
<td>NCES Identifier of National Center for Education Statistics</td>
<td>The unique identifier assigned to an LEA or school by the National Center for Education Statistics (NCES).</td>
</tr>
<tr>
<td>WorldCat knowledge</td>
<td>The collection ID</td>
</tr>
</tbody>
</table>
### Local identifiers

These identifiers are unique to your library.

<table>
<thead>
<tr>
<th>LOCAL IDENTIFIER</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Accountancy System ID</strong></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><strong>GST Registration Number</strong></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><strong>ILS Supplier Number</strong></td>
<td>Used to track the identifier used by your previous ILS.</td>
</tr>
<tr>
<td><strong>Match Codes</strong></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><strong>PST Registration Number</strong></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><strong>Vendor number</strong></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 Worldwide Interbank Financial Telecommunication (SWIFT).</td>
</tr>
<tr>
<td>International Bank Account Number (IBAN)</td>
<td>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.</td>
</tr>
</tbody>
</table>

### 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>
<tr>
<td>NOTIFICATION SETTING</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>----------------------</td>
<td>-------------</td>
</tr>
<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.