Receive and invoice monographs at the same time

Discover how to receive and invoice single-part and multi-part monographs in WorldShare Acquisitions.

1. From the left navigation, click Receive and Invoice.
2. In order to receive and invoice items, you must select an invoice or create a new invoice.

   Create a new invoice
   a. From the Receive and Invoice panel, click New Invoices.
   b. Enter the Vendor, Invoice Number, and Invoice Date of the invoice.
   c. Click Save. This invoice will then be automatically selected for use and you can skip to step 7.

   Select an existing invoice
   a. Select the vendor.
      • Enter the vendor name into the Vendor search box in the left panel. As you type, a list will appear showing the vendors in use that match your search.
      • If a vendor does not appear, make sure the vendor is listed as In use in Vendors.
   b. Select the invoice.
      • Type the invoice number into the Invoice Number search box. As you type, a list will appear showing the vendors in use that match your search.

3. Click View Items.
4. Find the items you want to receive and invoice.

   Find a specific item
   a. Select a search filter from the Search drop-down list.
   b. Enter the barcode, ISBN, ISSN, OCLC number, or title, using the Search Text form field. Search results appear automatically when you stop typing or hit enter.
   c. To return to the list of outstanding items, delete all text from the Search Text form field.
      Note: Barcode searches are possible only after importing shelf ready data. See Import invoice and/or shelf-ready data files.

   Find all items on an order
   a. Select Order Number from the Search drop-down list.
   b. Enter the full order number (PO number), including "PO" and dashes (-), in the Search Text form field. Search results appear automatically when you stop typing.
   c. To return to the list of outstanding items, delete all text from the Search Text form field.
5. You may also narrow your search by one of the filters below.

**Search filters - Table**

<table>
<thead>
<tr>
<th>TO SEARCH BY</th>
<th>USE RETRIEVAL METHOD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search</td>
<td>Select an index with which to limit your search from the list:</td>
</tr>
<tr>
<td></td>
<td>◦ Keyword</td>
</tr>
<tr>
<td></td>
<td>◦ Title (default)</td>
</tr>
<tr>
<td></td>
<td>◦ Copy Number</td>
</tr>
<tr>
<td></td>
<td>◦ Barcode</td>
</tr>
<tr>
<td></td>
<td>◦ Invoice Number</td>
</tr>
<tr>
<td></td>
<td>◦ ISBN</td>
</tr>
<tr>
<td></td>
<td>◦ ISSN</td>
</tr>
<tr>
<td></td>
<td>◦ Order Item Number</td>
</tr>
<tr>
<td></td>
<td>◦ Order Number</td>
</tr>
<tr>
<td>Content Type</td>
<td>Select the content type of the item from the list.</td>
</tr>
<tr>
<td></td>
<td>◦ To return to the list of all items, select the blank space in the list.</td>
</tr>
<tr>
<td>Branch</td>
<td>Select the branch the item is to be delivered to from the list.</td>
</tr>
<tr>
<td></td>
<td>◦ The branch is in the Location column on the order.</td>
</tr>
<tr>
<td></td>
<td>◦ To return to the list of outstanding items, select the blank space in the list.</td>
</tr>
<tr>
<td>Order Status (not available for editing when action is set to Receive)</td>
<td>Select the degree to which the order has been placed:</td>
</tr>
<tr>
<td></td>
<td>◦ Ordered</td>
</tr>
<tr>
<td></td>
<td>◦ Cancellation requested</td>
</tr>
<tr>
<td></td>
<td>◦ Not cancelled</td>
</tr>
<tr>
<td></td>
<td>◦ Cancelled</td>
</tr>
<tr>
<td>Receipt Status</td>
<td>Select the degree to which the order has been completed:</td>
</tr>
<tr>
<td></td>
<td>◦ Not received</td>
</tr>
<tr>
<td></td>
<td>◦ Received</td>
</tr>
</tbody>
</table>
TO SEARCH BY

- Returned
- Withdrawn

USE RETRIEVAL METHOD

Select the degree to which invoicing has been completed:

- Not invoiced
- Partially invoiced
- Invoiced
- Partially paid
- Paid

Purchase Status

6. In the Call#, Barcode column, fill in the call number fields. Follow local practice.

7. Fill in the barcode field (use scanner or type barcode). If you type in the barcode, press <Enter> to receive and invoice the item (the cursor must be in the barcode field when you press <Enter>):

Result

- The item moves to the Item(s) processed in this session area at the bottom of the screen.
- The Invoiced column says 100%.
- The barcode links to the item record.
- The item is now available in WMS Circulation and WorldCat Local/Discovery.
- If the item has a hold or a Requestor, the system displays an alert at the top of the screen by default. Contact OCLC Support or your Implementation Manager to turn off this feature.

To set cost of item

The cost field ($c of the LHR) is filled in automatically with the price of the item from the order. When the item is received, its cost is assigned according to either:

- Total unit cost (including any service charges, shipping, discounts, or taxes). **This is the default for all existing and new libraries.**
- Unit cost (excluding any service charges, shipping, discounts, or taxes)
- No cost is assigned

To change how item cost is assigned, contact OCLC Support or your Implementation Manager.

8. Next steps:

- Optionally you can Print labels for received items.
- To pay the invoice, see Pay an invoice.
- To edit the item record, click the barcode.
View the WorldCat record for an order item

You can view the WorldCat bibliographic record for an order item in WorldShare Record Manager or your WorldCat Discovery instance. This allows you to verify that the record for a received item is correct by:

- Viewing the metadata and, if needed, editing a record before receiving (Record Manager)
- Viewing the patron-facing record (WorldCat Discovery)

Note: This functionality does not apply to items with either of the following processing types

- Electronic Product
- Local

1. From the Receive and Invoice screen, hover over the information icon (i) next to the order item title.
2. The information pop-up window provides the following links:
   - View/Edit Metadata - Click to open the full MARC 21 bibliographic record in Record Manager. This link only appears if you have permission to view Metadata.
   - View in WorldCat Discovery - Click to open the bibliographic record in your WorldCat Discovery instance.

Watch a video

Receive and invoice monographs (8:21)

This video shows how to receive and invoice single-part and multi-part monographs in WorldShare Acquisitions.

Learn more in a training course: Receiving and invoicing monographs