Discover how to notify a vendor of your order by sending them an EDIFACT order message using email or secure FTP in WorldShare Acquisitions.

**Overview**

When placing an order in WorldShare Acquisitions, you can notify the vendor of your order by sending them an EDIFACT order message using secure FTP (SFTP or FTPS) or email.

- Vendors prefer to receive EDIFACT orders via secure FTP as it can decrease order processing times.
- EDIFACT orders received via email will have the content in the body of the email and as an attachment.

You must follow the instructions below before using either EDIFACT order messaging method. You have to:

- Configure settings for every vendor you plan on notifying.
- Access to [OCLC Service Configuration](https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Order/Send_your_vendor_EDIFACT_order_in...) in order to configure EDIFACT order messages using email. For information on creating an account, see [Signing In](https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Order/Send_your_vendor_EDIFACT_order_in...).

Note: Most vendors require that you include the following information when you place an order: ISBN or ISSN for all order items and an Account Number.

**EDIFACT order data**

The following information will be included in the order data file you send to the vendor.

**EDIFACT order data - Table**

<table>
<thead>
<tr>
<th>EDIFACT ELEMENT</th>
<th>SEGMENT</th>
<th>EDIFACT ELEMENT DEFINITION</th>
<th>HOW WMS SETS THIS VALUE</th>
<th>EXAMPLE SEGMENT</th>
<th>EXAMPLE VALUES</th>
</tr>
</thead>
<tbody>
<tr>
<td>UNB Library Identifier</td>
<td>UNB</td>
<td>First of two identifiers in UNB segment. Identifies the library sending the order message.</td>
<td>An identifier for the library sending the order message. Can be configured by the library to use the: • SAN: Uses qualifier 31B</td>
<td>Library SAN: UNB+UNOC:3+Library SAN:31B+Vendor SAN:31B+200623:0700+{Unique Interchange ID}'</td>
<td>UNB+UNOC:3+{UNB Library Identifier}:{Library Qualifier}+Vendor Library GLN: SAN:31B+200623:0700+{Unique Interchange ID}'</td>
</tr>
<tr>
<td>EDIFACT ELEMENT</td>
<td>SEGMENT</td>
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<tr>
<td>Unique Interchange ID</td>
<td>UNB</td>
<td>Identifier for the message itself in the UNB segment.</td>
<td>Unique identifier assigned to each interchange by the system.</td>
<td>UNB+UNOC:3+LibrarySAN:31B+VendorSAN:3+{Interchange ID}</td>
<td>UNB+UNOC:3+LibrarySAN:31B+VendorSAN:3+{Interchange ID}</td>
</tr>
<tr>
<td>Unique Message ID</td>
<td>UNH</td>
<td>Identifier for the message itself in the UNH segment.</td>
<td>Unique identifier assigned to each message by the system.</td>
<td>UNH+{Unique Message ID}+ORDERS:D:96A:UN:EAN008’</td>
<td>UNH+20200623070000+ORDERS:D:96A:UN:EAN008’</td>
</tr>
<tr>
<td>Type of Order</td>
<td>BGM</td>
<td>Identifies the type of order that is being sent, including whether the order is a Rush order.</td>
<td>If the Shipping Type is “Express” or “Next Day”, WMS will use value 22E (Rush Order)</td>
<td>BGM+{Type of Order}+PO-2020-1+9’</td>
<td>Rush Order: BGM+22E+PO-2020-1+9’</td>
</tr>
</tbody>
</table>

- Library Supplied Identifier: Uses qualifier 91

- Rush order
- Continuation order

If all items on the order are Subscriptions, WMS will use value 224 (Continuation Order)

If both conditions above apply, WMS will use 224 (Continuation Order)
<table>
<thead>
<tr>
<th>EDIFACT ELEMENT</th>
<th>SEGMENT</th>
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<th>HOW WMS SETS THIS VALUE</th>
<th>EXAMPLE SEGMENT</th>
<th>EXAMPLE VALUES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order Number</td>
<td>BGM</td>
<td>Identifier for the order itself in the BGM segment.</td>
<td>Unique identifier for the order being sent by WMS.</td>
<td>BGM+220+{WMS OrderNumber}+9'</td>
<td>BGM+220+PO-2020-1+9'</td>
</tr>
<tr>
<td>Original Order or Re-transmission</td>
<td>BGM</td>
<td>Identifies whether order is the original order message sent or a retransmission of a previous message.</td>
<td>If the order is the original order, WMS will use value 9. If the order is a retransmission of a previous order, WMS will use value 7.</td>
<td>BGM+220+PO-2020-1+{Resend Indicator}</td>
<td>Original Order: BGM+220+PO-2020-1+9' Re-transmission: BGM+220+PO-2020-1+7'</td>
</tr>
<tr>
<td>Date of Order</td>
<td>DTM</td>
<td>Identifies the date of the order.</td>
<td>Current date the order was sent.</td>
<td>DTM+137:{YYYYMMDD}:102</td>
<td>DTM+137:20200623:102'</td>
</tr>
<tr>
<td>NAD Library Identifier</td>
<td>NAD (Specifically NAD+BY)</td>
<td>First of two NAD segment identifiers. Identifies the library sending the order message.</td>
<td>An identifier for the library sending the order message. Can be configured by the library to use the:</td>
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<td></td>
<td></td>
<td>• SAN: Uses qualifier 31B</td>
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<td></td>
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<td></td>
<td>• GLN: Uses qualifier 14</td>
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<td></td>
<td></td>
<td></td>
<td>• ISIL: Uses qualifier 92</td>
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<td></td>
<td></td>
<td>• WorldCat Registry ID: Uses qualifier 92</td>
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<td></td>
<td>• Vendor Supplied Identifier: Uses qualifier 91</td>
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<td></td>
<td>• Library</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>SAN: NAD+BY+LibrarySAN::31B</td>
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<td></td>
<td></td>
<td></td>
<td>GLN: NAD+BY+LibraryGLN::14</td>
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<td></td>
<td></td>
<td>ISIL: NAD+BY+LibraryISIL::92</td>
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<td></td>
<td></td>
<td>WorldCat Registry ID: NAD+BY+LibraryWWCA::92</td>
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<td>etc.</td>
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<td>EDIFACT ELEMENT</td>
<td>SEGMENT</td>
<td>EDIFACT ELEMENT DEFINITION</td>
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<td>EXAMPLE VALUES</td>
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</tr>
<tr>
<td>NAD Vendor Identifier</td>
<td>NAD</td>
<td>(Specifically NAD+SU)</td>
<td>Second of two NAD segment identifiers. Identifies the vendor recipient of the order message.</td>
<td>NAD+SU+{NAD Vendor Identifier}::{Vendor Qualifier}</td>
<td>SAN: NAD+SU+VendorSAN::31B</td>
</tr>
<tr>
<td></td>
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<td></td>
<td>GLN: NAD+SU+VendorGLN::14</td>
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<td></td>
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<td></td>
<td>An identifier for the vendor receiving the order message. Can be configured to use the:</td>
<td></td>
<td>etc.</td>
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<td></td>
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<td>• SAN: Uses qualifier 31B</td>
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<td>• GLN: Uses qualifier 14</td>
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<td>• ISIL: Uses qualifier 92</td>
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<td></td>
<td></td>
<td>• Local vendor Number: Uses qualifier 92</td>
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<td></td>
<td></td>
<td></td>
<td>• Vendor Supplied Identifier: Uses qualifier 91</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>• Library Supplied Identifier: Uses qualifier 91</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Account Number</td>
<td>RFF</td>
<td>(Specifically RFF+API)</td>
<td>Identifies the account number to be used for the order.</td>
<td>RFF+API:{Account Number}</td>
<td>RFF+API:123456-1'</td>
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<tr>
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<td></td>
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</tr>
<tr>
<td>Currency Code</td>
<td>CUX</td>
<td></td>
<td>Identifies the currency used</td>
<td>CUX+2:{Currency Code}:9'</td>
<td>CUX+2:USD:9'</td>
</tr>
<tr>
<td>EDIFACT ELEMENT</td>
<td>SEGMENT</td>
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</tr>
<tr>
<td>Line Number</td>
<td>LIN</td>
<td>Identifies the individual line item on an order.</td>
<td>Sequential number identifying the line item on the order.</td>
<td>LIN+{Line Number}++1234567890123:EN</td>
<td>LIN+1++1234567890123:EN'</td>
</tr>
<tr>
<td>Book or Serial Identifier (ISBN or ISSN)</td>
<td>LIN PIA</td>
<td>Contains the book (ISBN) or serial (ISSN) identifier for the item being ordered.</td>
<td>Preferred ISBN or ISSN selected by the user in WMS.</td>
<td>LIN+1++{Preferred ISBN}:EN'</td>
<td>LIN+1++1234567890123:EN'</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Note:</td>
<td>PIA+5+{Preferred ISBN}:IB'</td>
<td>PIA+5+1234567890123:IB'</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• IS is used for PIA qualifier if ISSN is used</td>
<td>Or Or</td>
<td>Or</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• If no preferred ISBN or ISSN is selected, the field is left blank</td>
<td>LIN+1++{Preferred LIN}++1234-5678:EN'</td>
<td>PIA+5+1234-5678:IS'</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>PIA+5+{Preferred ISSN}:IS'</td>
<td></td>
</tr>
<tr>
<td>Resource Information</td>
<td>IMD</td>
<td>Identifies information about the resource being ordered, including:</td>
<td>Resource information retrieved from WorldCat, including:</td>
<td>IMD+L+010+:::{Author}</td>
<td>IMD+L+050+:::American Indians and the market economy, 1775-1850'</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Title</td>
<td>• Title</td>
<td>IMD+L+065+:::{Author}</td>
<td>IMD+L+065+:::Lance Greene'</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Author</td>
<td>• Author</td>
<td>IMD+L+100+:::{Edition}</td>
<td>IMD+L+120+:::{Publisher}</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Edition</td>
<td>• Edition</td>
<td>IMD+L+120+:::{Publisher}</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Publisher</td>
<td>• Publisher</td>
<td>IMD+L+170+:::{Date of publication}</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Date of Publication</td>
<td>• Date of publication</td>
<td>IMD+L+170+:::©2010'</td>
<td></td>
</tr>
<tr>
<td>Quantity</td>
<td>QTY</td>
<td>Identifies the Quantity as</td>
<td>QTY+21:{Quantity}QTY+21:1'</td>
<td></td>
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<tr>
<td>EDIFACT ELEMENT</td>
<td>SEGMENT</td>
<td>EDIFACT ELEMENT DEFINITION</td>
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<tr>
<td>Branch</td>
<td>GIR</td>
<td>Identifies the branch where the item will be located.</td>
<td>Identifier from the WorldCat Registry of Branch selected as the home location of this item.</td>
<td>GIR+L01+1:LQT+{Branch ID}:LLO+MAIN-STACKS:LSQ+BKS,100:LFN'</td>
<td>GIR+L01+1:LQT+12345:LL STACKS:LSQ+BKS,100:LFN'</td>
</tr>
<tr>
<td>Shelving Location</td>
<td>GIR</td>
<td>Identifies the shelving location where the item will be located.</td>
<td>Identifier configured by the library and selected on the order to indicate the specific shelving location of this item as its home branch.</td>
<td>GIR+L01+1:LQT+12345:LL STACKS:LSQ+BKS,100:LFN'</td>
<td>GIR+L01+1:LQT+12345:LL STACKS:LSQ+BKS,100:LFN'</td>
</tr>
<tr>
<td>Fund Code</td>
<td>GIR</td>
<td>Identifies the fund where the item will be charged in the library's budget.</td>
<td>Code for the fund to be used when encumbering money for the item on the library's budget.</td>
<td>GIR+L01+1:LQT+12345:LL STACKS:LSQ+BKS,100:LFN'</td>
<td>GIR+L01+1:LQT+12345:LL STACKS:LSQ+BKS,100:LFN'</td>
</tr>
<tr>
<td>Note for Vendor</td>
<td>FTX</td>
<td>Note for the vendor processing the order.</td>
<td>Note entered by the user and specified to be for the vendor. Can have multiple values.</td>
<td>FTX+LIN+++{Vendor Note 1}'</td>
<td>FTX+LIN+++{Vendor Note 2}'</td>
</tr>
<tr>
<td>Pricing</td>
<td>PRI</td>
<td>Pricing of various types provided for the lin</td>
<td>Price calculated in different ways based on the values entered by the user in PRI+AAA:{UnitPrice - Discount Amount + Service Charges +</td>
<td>PRI+AAA:30.97:CA'</td>
<td>PRI+AAB:29.99:CA'</td>
</tr>
<tr>
<td>EDIFACT ELEMENT</td>
<td>SEGMENT</td>
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</tr>
<tr>
<td>Line Item Identifier</td>
<td>RFF</td>
<td>Line item identifier provided by the library management system.</td>
<td>WMS: • Price of type AAA: UnitPrice - Discount Amount + Service Charges + Shipping</td>
<td>RFF+LI: {Order Item Number}&quot;</td>
<td>RFF+LI: &quot;PO-2020-1-1&quot;</td>
</tr>
<tr>
<td>Fund Code</td>
<td>RFF</td>
<td>Identifies the fund where the item will be charged in the library’s budget.</td>
<td>Code for the fund to be used when encumbering money for the item on the library’s budget.</td>
<td>RFF+BFN: {Fund Code}&quot;</td>
<td>RFF+BFN: &quot;BKS&quot;</td>
</tr>
<tr>
<td>Number of line items</td>
<td>CNT</td>
<td>Count of the line items on</td>
<td>Count of the line items on</td>
<td>CNT+2: {Number of Line Items}&quot;</td>
<td>CNT+2: &quot;5&quot;</td>
</tr>
<tr>
<td>EDIFACT ELEMENT</td>
<td>SEGMENT</td>
<td>EDIFACT ELEMENT DEFINITION</td>
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</tr>
<tr>
<td>Number of segments</td>
<td>UNT</td>
<td>Number of segments in the order message.</td>
<td>N/A</td>
<td>UNT+{Number of Segments}+20200623070000'</td>
<td>UNT+23+20200623070000'</td>
</tr>
<tr>
<td>Unique Message ID</td>
<td>UNT</td>
<td>Repeat of unique message ID in UNH segment.</td>
<td>Unique identifier assigned to each message by the system. Fits pattern: yyyyMMddhhmmss</td>
<td>UNT+23+{Unique Message ID}</td>
<td>UNT+23+20200623070000'</td>
</tr>
<tr>
<td>Number of Messages</td>
<td>UNZ</td>
<td>Number of messages in file.</td>
<td>N/A</td>
<td>UNZ+{Number of Messages}+20200623070000'</td>
<td>UNZ+1+20200623070000'</td>
</tr>
<tr>
<td>Unique Interchange ID</td>
<td>UNZ</td>
<td>Repeat of unique interchange ID in the UNB segment.</td>
<td>Unique identifier assigned to each interchange by the system. Fits pattern: yyyyMMddhhmmss</td>
<td>UNZ+1+{Unique Interchange ID}</td>
<td>UNZ+1+20200623070000'</td>
</tr>
</tbody>
</table>

**Sample message**

Note:
- Uses the SAN for the vendor identifiers and a library-supplied identifier for the library identifiers
- Bolded portions are specified in table above

UNA:+,?
UNB+UNOC:3+1234:92+1234567:31B+200623:1546+20200623154616'
UNH+20200623154616+ORDERS:D:96A:UN:EAN008'
BGM+220+PO-2017-3478+9'
DTM+137:20200623:102'
RFF+API:03487239847'
NAD+BY+1234::92'
NAD+SU+1234567::31B'
CUX+2:USD:9'
LIN+1++9780817317140:EN'
Step 1: Contact your vendor

Before you begin configuration, you must contact the vendor in order to determine the correct EDIFACT notification settings:

- The vendor will provide what to put in the UNB Vendor Identifier and NAD Vendor Identifier fields.
- The vendor may also have recommendations for how your library should identify itself in the UNB Library Identifier and NAD Library Identifier fields. The vendor may require certain identifier types to be used, or they may provide you with the options they support.
- For secure FTP order messages, ask the vendor for their secure FTP information for dropping off order messages.
- For email order messages, ask the vendor which email contact the message should be sent to.

https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Order/Send_your_vendor_EDIFACT_order_in...
Step 2: Configure your vendor

The following workflow applies to sending order messages via both email and secure FTP. Steps that only apply to one order delivery method are identified.

1. On the left navigation, click Vendors.
2. Search for the vendor you want to configure for the EDIFACT email method.
3. From the vendor search results, click the Vendor Name.
4. (Secure FTP messages only) In the vendor record, click the Links & Logins accordion.
   a. Click Add New Link.
   b. Complete the following fields for the secure FTP link.
      ▪ Link Name - Enter a descriptive name for the link (e.g., FTP account for EDIFACT orders).
      ▪ URL - Enter the URL of your vendor's FTP site. The URL must start with sftp:// or ftps://.
      ▪ Type - Select SFTP or FTPS from the drop-down list.
      ▪ User ID - Enter the username provided by the vendor for the secure FTP account.
      ▪ Password - Enter the password provided by the vendor for the secure FTP account.
      ▪ Directory - Enter the directory or folder where EDIFACT orders should go.
        ▪ Top-level folders do not require a beginning slash (e.g. orders not /orders).
        ▪ Sub-folders require a slash (e.g., incoming/order).
   c. Click Save.
5. In the vendor record, click the Acquisitions Settings accordion.
   a. In the Specific Notification Settings fields, set the following:
      ▪ For secure FTP order messages:
        1. In the Action list, select Ordering.
        2. In the Delivery Method list, select FTP (EDIFACT).
        3. In the FTP Profile list, select the profile you created in step 1.
      ▪ For email order messages:
        1. In the Action list, select Ordering.
        2. In the Contact list, select your vendor contact who will be receiving the email. You can add contacts in the Vendors section of the vendor record.
        3. In the Delivery Method list, select E-Mail (EDIFACT).
        4. Click Save.
   b. In the Edifact Notification Settings fields, use the lists to select the type of identifiers provided to you by your vendor. You must select a value for all four fields:
1. Depending on what you select for UNB Vendor Identifier and NAD Vendor Identifier, your next steps will vary.

<table>
<thead>
<tr>
<th>IDENTIFIER TYPE</th>
<th>ACTION</th>
</tr>
</thead>
</table>
| SAN             | 1. Click the Identifiers accordion.  
2. In the SAN field, enter the vendor identifier. |
| GLN or ISIL     | 1. Click the Identifiers accordion.  
2. In the Additional Identifiers Type list, select GLN Global Number or ISIL International Standard for Libraries.  
3. In the Value field, enter the vendor identifier. |
| Local Vendor ID | The Local Vendor Number is assigned by the system. To view your vendor number, click the Local Identifiers accordion. |
| Vendor-supplied ID or Library-supplied ID | Enter the identifier in the text field that appears on the right. |

2. Depending on what you select for UNB Library Identifier and NAD Library Identifier, your next steps will vary.

<table>
<thead>
<tr>
<th>IDENTIFIER TYPE</th>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAN, GLN, or ISIL</td>
<td>See Step 3: Add library identifiers in OCLC Service Configuration.</td>
</tr>
<tr>
<td>WorldCat Registry ID</td>
<td>The WorldCat Registry ID is an identifier in the form of a running number which is assigned to all libraries and other cultural institutions within the WorldCat Registry. To view your WorldCat Registry ID, log into OCLC Service Configuration, and click WorldCat Registry &gt; Identifiers.</td>
</tr>
<tr>
<td>Vendor-supplied ID or Library-supplied ID</td>
<td>Enter the identifier in the text field that appears on the right.</td>
</tr>
</tbody>
</table>

6. Click Save.

7. If you selected SAN, GLIN, or ISIL for your UNB Library Identifier or NAD Library Identifier, continue to the next step to configure your library identifier. Otherwise you can begin using the EDIFACT email method (see Step 4:...
Step 3: Add library identifiers in OCLC Service Configuration

If your UNB Library Identifier or NAD Library Identifier is a SAN, GLN, or ISIL, you must configure your library identification in OCLC Service Configuration.

1. Sign in to Service Configuration.
2. On the left navigation, click WorldCat Registry > Identifiers.
3. Select your Identifier Type from the list.
4. Enter your Identifier in the text field.
5. Click Add.
6. Click Save.
7. You can begin using the EDIFACT email method.

Step 4: Send the order

1. Create your order for the vendor and add line items using your normal method.
2. Select an ISBN or ISSN for each item on the order.
3. Select the appropriate Account Number if the vendor requires an account number.
4. Click Place Order.
5. On the Place Order window, make sure the Notify Vendor about this order check box is selected.
6. On the Notify Vendor about Order window, confirm:
   (Secure FTP order messages) The delivery method is set to FTP (EDIFACT) and the FTP profile selected is correct.
   (Email order messages) The delivery method is set to E-mail (EDIFACT) and the vendor contact selected is correct.
7. Click Continue.
8. Click Place & Send Order.