

WorldShare® Acquisitions: *Receiving and invoicing monographs*

Receiving and invoicing single-part monographs

Option 1 - Receive and invoice (simultaneously)

- Create invoice
 - Click **Receive & Invoice** and select the Mono tab
 - From the Action menu, select **Receive & Invoice**
 - Click **New Invoice**. In the Add New Invoice window, enter an invoice number in the text box. Select the vendor you used for your order. If necessary, edit the Invoice Date
 - Click **Save**
 - Click **Outstanding Items**
- Receive and add items to invoice
 - Select titles to add to invoice from the list of Outstanding Items. Or search for title, PO#, ISBN/ISSN, or OCLC number using text box on the top left side of the screen. You can also limit your search by Content Type or Branch
 - For each title:
 - Edit the **Call number** if necessary
 - Scan or type the item **Barcode** and press <Enter>
 - The item record is created and added to the invoice, and the title moves to the “Items processed this session” section of the screen
 - If you added a Staff note to the order item and selected Show on **Receiving** or **Receiving and Payment**, a dialog box with the note will pop up when you receive the item. The note will also be visible in the Notes column on the Receiving screen.

Option 2 – Invoice and receive separately

- **Invoice**
 - Create invoice
 - Click on **Receive & Invoice** and select the **Mono** tab
 - From the Action menu, select **Invoice**
 - Click **New Invoice**. In the Add New Invoice window, enter an invoice number in the text box. Select the vendor you used for your order. If necessary, edit the Invoice Date
 - Click **Save**
 - Click Outstanding Items
 - Add items to Invoice
 - Select titles to add to the invoice from the list of Outstanding Items. Or search for title, PO#, ISBN/ISSN, or OCLC number using text box on the top left side of the screen. You can also limit your search by Content Type or Branch.
 - Click **Add to invoice** next to each title on the list of Outstanding Items. In Invoice All or Part of Item window, select number of copies to invoice and percentage to pay; then click **OK**.
- **Receive** (Receive items previously invoiced or Receive without Invoicing)
 - Click on **Receive & Invoice** and select the **Mono** tab
 - From the Action menu, select **Receive**
 - Click Outstanding Items
 - Select titles to receive from the list of **Outstanding Items**. Or search for title, PO#, ISBN/ISSN, Invoice number, or OCLC number using text box on the top left side of the screen. You can also limit your search by Content Type or Branch.
 - For each title:

- Edit the **Call number** if necessary
- Scan or type the item **Barcode** and press <Enter>
- The item record is created, and the title moves to the “Items processed this session” section of the screen
- If you added a Staff note to the order item and selected Show on **Receiving** or **Receiving and Payment**, a dialog box with the note will pop up when you receive the item. The note will also be visible in the Notes column on the Receiving screen.

Receiving and invoicing multi-part monographs

- Click on **Receive & Invoice** and select the **Serials** tab
- From the Action menu, select **Receive & Invoice**
- Click **New Invoice**. In the Add New Invoice window, enter an invoice number in the text box. Select the vendor you used for your order. If necessary, edit the Invoice Date
- Click **Save**
- Click **Outstanding Items**. Be sure search box on top left is empty
- You can search for titles on your order by title, ISBN, or Order number
- Click on **Start** for your title. The title will appear in the **Items Processed** area below with the status **Partially Received**
- Then click on **Add to Invoice** in the Invoice column (on the top part of the screen) to add the title to your invoice. You can choose to add the entire cost (100%) to the invoice or a lesser amount. The title will then appear again in the **Items Processed** area with the status **Receiving Started**.
- Click on the **Finish** button on the top part of the screen if you have received all of the volumes of the multipart monograph. The title will appear in the Items Processed area again with the Receiving Status of **Receiving Finished**.
- Click on the invoice link to go to the Invoice if you would like to edit and/or pay it at this point. Or you can follow the steps below in **Manage Invoices** to edit and/or pay it later.
- **NOTE:** You will need to create holdings for multi-part monographs in a separate step which will make them available for discovery in WorldCat® Local service or WorldCat® Discovery and available for circulation in WorldShare® Management Services (WMS). (This is covered in the Monograph Holdings training).

Manage invoices

- Click **Manage Invoices**, then **Open Invoices**.
- Find the invoice in the list of open invoices and click to select. (By default, invoices are sorted by invoice number. You may sort by any column. You may filter by vendor or invoice number, using the box at the top right).
- For each title, if necessary, edit fund, unit price, discount, service charges, shipping, and tax.
- You can add notes to invoice items by clicking on the folder icon in the Notes column. After typing the note, select Show in **None** or **Payment**. Then click **Save**.
- Click **Mark Invoice as Ready** or **Pay Now**. Optionally, you may **Unpay** an invoice if needed to make edits.
- When you pay the invoice the Notes for the order items and invoice items will display in a pop up (if you've selected “Show on payment.” Click on **OK** to close.

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