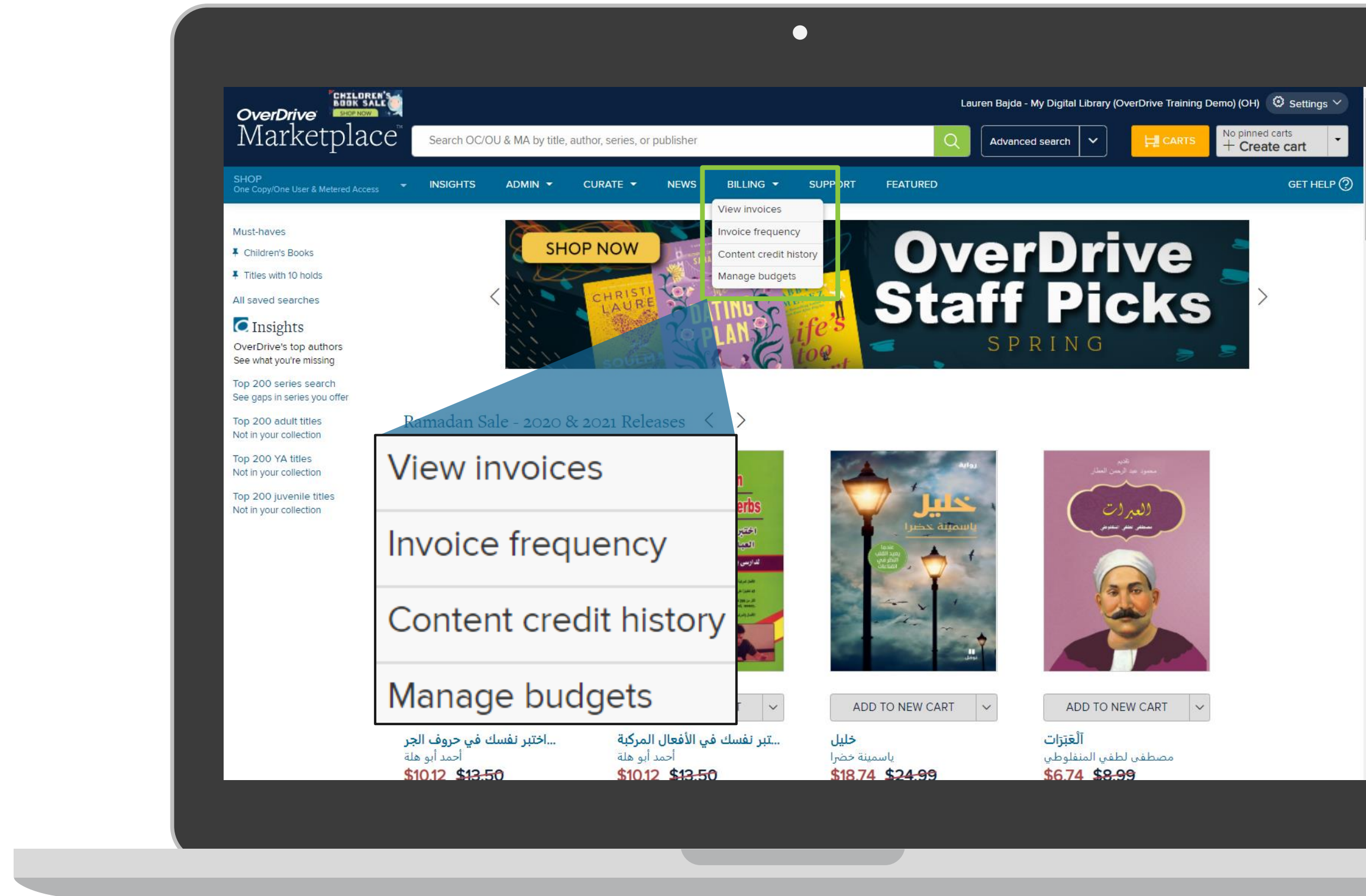


# Marketplace Invoicing

View and set preferences for billing in Marketplace

# Billing

In OverDrive Marketplace, you can view invoices and billing information all in one place, the **Billing** tab.



# Marketplace permissions

View invoices

Invoice frequency

- **Manage Invoices** permission

Content credit history

- **Reports** permission

User permissions

- Admin
  - End-user support
  - Reports
  - Manage invoices
  - Users
  - Local content
  - Weeding
  - Content access levels
  - Library site admin
  - Curate
  - Marketplace settings
  - Download MARC records
- Purchasing
  - RTL Manager
  - Smart List
  - Purchasei
  - Holds Manager
  - MARC preferences
- Shopping
  - Delete cartsi
  - Create/view carts

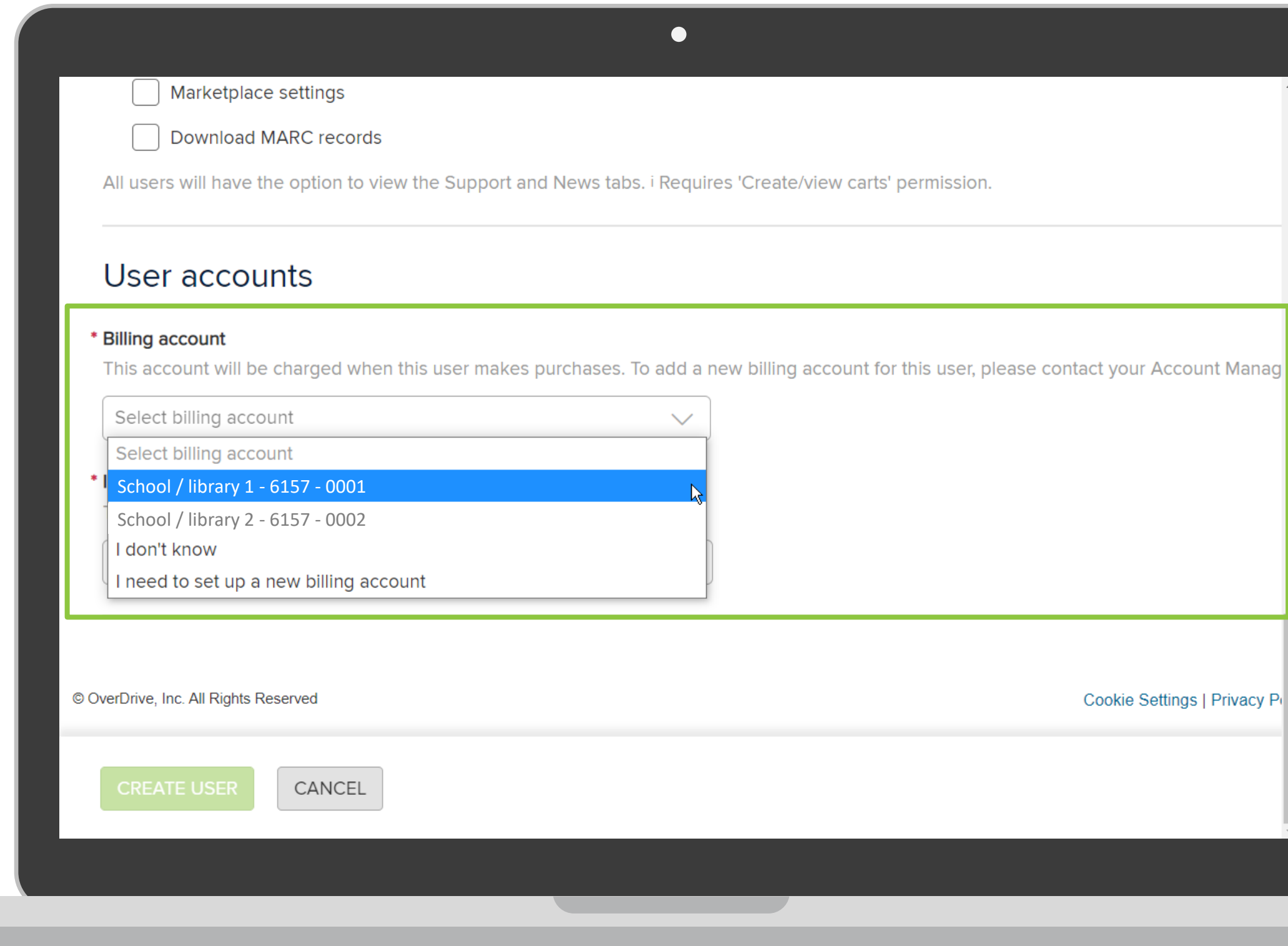
All users will have the option to view the Support and News tabs. <sup>i</sup> Requires 'Create/view carts' permission.

CREATE USER CANCEL

# Marketplace permissions

“Billing account” controls the account that’s billed when a Marketplace user makes a purchase.

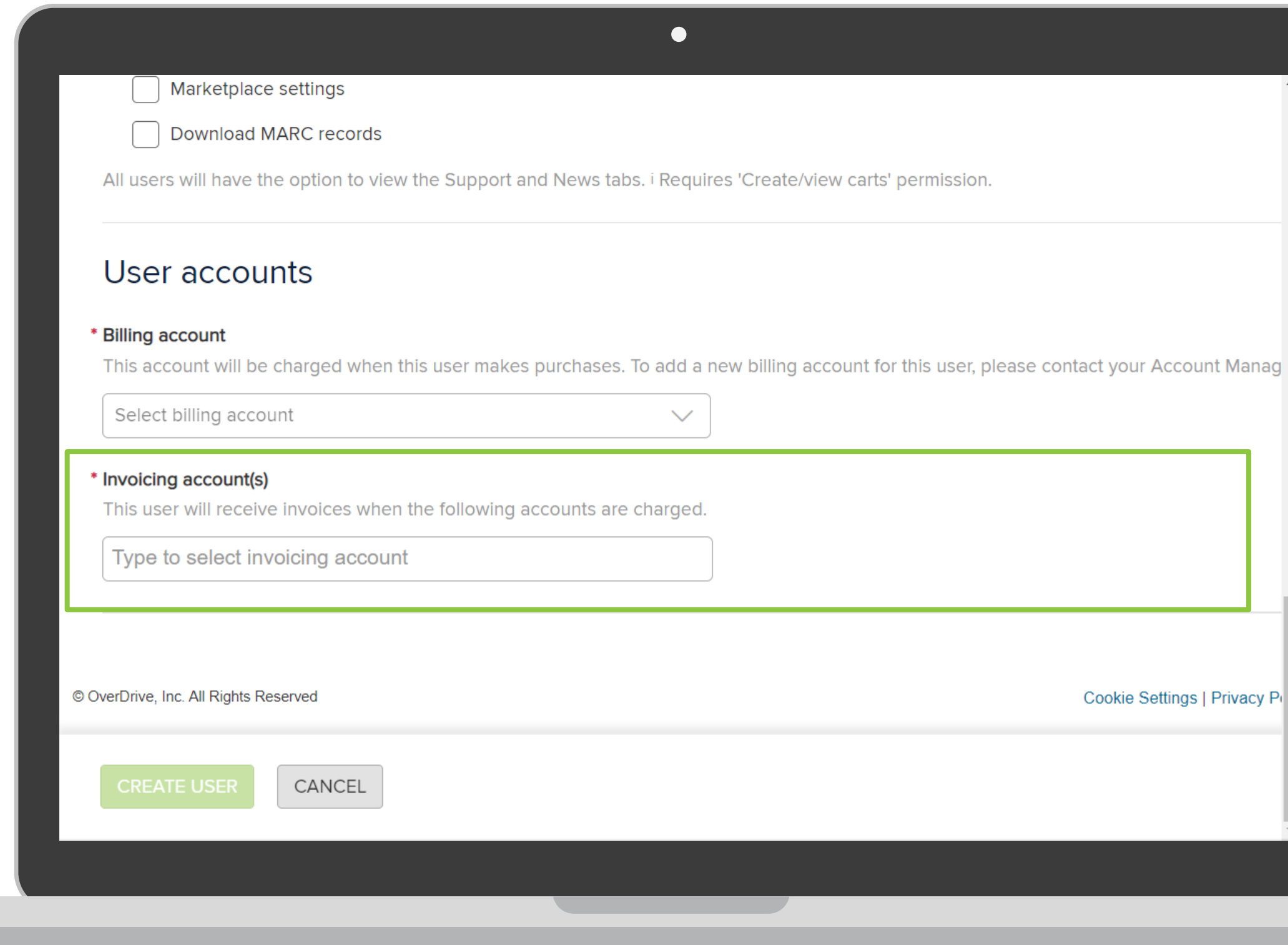
You can add **multiple billing accounts** to use multiple funding sources for your digital collection.



# Marketplace permissions

“Invoicing account” determines the accounts for which the user receives invoices.

User will receive an **email notification** when an invoice is created for any of their “Invoicing accounts”.



Marketplace settings

Download MARC records

All users will have the option to view the Support and News tabs. i Requires 'Create/view carts' permission.

---

### User accounts

\* **Billing account**  
This account will be charged when this user makes purchases. To add a new billing account for this user, please contact your Account Manager.

Select billing account

\* **Invoicing account(s)**  
This user will receive invoices when the following accounts are charged.

Type to select invoicing account

© OverDrive, Inc. All Rights Reserved [Cookie Settings](#) | [Privacy Policy](#)

# Notifications

The screenshot shows the OverDrive Marketplace interface on a laptop. At the top, there's a navigation bar with the OverDrive logo, a search bar, and user information for Lauren Bajda. Below the navigation bar is a secondary menu with options like SHOP, INSIGHTS, ADMIN, CURATE, NEWS, BILLING, SUPPORT, and FEATURED. The main content area displays an invoice for 06157CO20157627. The invoice includes the OverDrive logo, contact information, a table of invoice details (Customer ID, Invoice number, Date), and sections for payment instructions: 'Pay directly in Marketplace', 'Other payment options', 'Pay by check', and 'Pay by ACH or wire'. A 'SAVE PDF' button is visible in the top right of the invoice area.

OverDrive Marketplace  
CHILDREN'S BOOK SALE  
Lauren Bajda - My Digital Library (OverDrive Training Demo) (OH) Settings

Search OC/OU & MA by title, author, series, or publisher  
Advanced search  
CARTS  
No pinned carts  
+ Create cart

SHOP  
One Copy/One User & Metered Access  
INSIGHTS  
ADMIN  
CURATE  
NEWS  
BILLING  
SUPPORT  
FEATURED  
GET HELP

Invoice - 06157CO20157627  
SAVE PDF

**OverDrive**  
One OverDrive Way  
Cleveland, OH 44125  
United States  
Phone: +1 216 573 6886 Fax: +1 216 672 0087  
Email: [invoicing@overdrive.com](mailto:invoicing@overdrive.com)  
US Tax ID number: 34-1522786

Customer ID	6157-0001
Invoice number	06157CO20157627
Date	May 28, 2020

**Pay directly in Marketplace**

- Select one or more invoices and click **Pay invoice(s)**.
- Select your payment method, then click **Pay by bank account** (US accounts only) or **Pay by credit card**.
- Enter the required information. Bank account information will be saved automatically for future use, and credit card information can be optionally saved.
- **Note:** Your saved bank account or credit card information can only be used by you.
- Click **Confirm payment**.

**Other payment options**  
When you make a payment using one of these methods, you must either include a list of invoice numbers and amounts due, or email the information separately to [invoicing@overdrive.com](mailto:invoicing@overdrive.com).

**Pay by check**  
Please make checks payable in USD to OverDrive, Inc.  
Remittance address:  
PO Box 72117  
Cleveland, OH 44192-0002  
United States

**Pay by ACH or wire**  
If you have a non-U.S. account and want to pay through your bank account, or if you don't want to pay directly in Marketplace, you can pay by ACH or wire. To do so, please visit OverDrive's banking instructions in Marketplace.

**Bill to:**  
Testing  
Testing  
Testing, OH test

**Sold to:**  
Testing

**Payment terms:**  
On receipt

# Recap - Invoice frequency

The screenshot shows the OverDrive Marketplace user interface. At the top, there's a navigation bar with the OverDrive Marketplace logo, a search bar, and user information for Lauren Bajda. Below the navigation bar, the page title is "Invoice frequency - 1225-0001". A dropdown menu for "Select billing account" is set to "School / library 1 - 6157 - 0001". A note states: "You can choose how often you receive invoices for One Copy/One User (OC/OU), Metered Access (MA), and Simultaneous Use (SU) content from the options below." Under "Important notes", there are three bullet points: "If you change your invoice frequency settings, the change will take effect on the first day of the next month.", "If you have Cost Per Circ (CPC) plan(s), you'll receive one invoice a month for your CPC plan(s), regardless of your selection below.", and "SU content can't be preordered, so it will only appear in standard invoices." The "Preorder invoice frequency" section has five radio button options, with "Daily: Give me one daily invoice that includes details about any preorder titles that reached their street dates the previous day." selected. The "Standard invoice frequency" section has four radio button options, with "On creation: Give me an invoice for every standard content order." selected. A green "SAVE" button is at the bottom left.

- Use the "Select billing account" dropdown if you receive invoices for multiple libraries/schools
- These preferences apply to OC/OU, MA, and SU content
- CPC plans will only provide invoices on a monthly basis
- Changes will take effect on the first day of the next month

# Recap - View invoices

The screenshot shows the OverDrive Marketplace interface. At the top, there's a navigation bar with the OverDrive Marketplace logo, a search bar, and user information for Lauren Bajda. Below the navigation bar, the page title is 'View invoices - 1225-0001'. A paragraph explains that the invoices shown include all open invoices and any invoices created on 1/1/2017 or later. An 'Important notes' section lists several points about invoice processing. A 'Summary' table shows financial details like 'Est. available content credit' and 'Est. balance due'. A 'Report options' modal is open, allowing users to filter invoices by 'Period Type', 'Start Date', 'End Date', 'Payment status', 'Flag', 'Order ID', 'Internal purchase order ID', and 'Invoice type'. The modal has 'Update' and 'Cancel' buttons. At the bottom of the page, there's a table with filters for 'Date', 'Payment status', 'Flag', and 'Invoice type'.

Summary	
Est. available content credit	\$0.00
Est. reserved content credit	\$0.00
Est. balance due	\$0.00
Est. unapplied payments*	\$0.00

Filter	Value
Date	Inception to 7/16/2020
Payment status	Unpaid, Partially paid
Flag	Any
Invoice type	All invoice types

- View invoices for purchase orders, contract fees, MARC record orders, Instant Digital Card, and more
- It may take up to 5 business days for invoices to appear on this page



# Recap – Content credit history

The screenshot displays the OverDrive Marketplace interface. At the top, the user is identified as "Lauren Bajda - My Digital Library (OverDrive Training Demo) (OH)". The main navigation bar includes "SHOP", "INSIGHTS", "ADMIN", "CURATE", "NEWS", "BILLING", "SUPPORT", and "FEATURED". The "Content credit history" report is selected, and a "Report options" dialog box is open. The dialog box contains the following fields:

- Period type: Last
- 30 Days
- Bill to account: All
- Credit to account: All
- Internal purchase order ID: (empty field)

Buttons for "Update" and "Cancel" are visible at the bottom of the dialog box. The background shows a table with columns for "Bill to account", "Credit to account", "Type", "Number", "Credit number", "Ordered/added by", and "Void status". A message states "Sorry, your search did not return any results."

- View details of content credit that was purchased by or earned by your library / school

# Recap - Manage budgets

OverDrive Marketplace

Lauren Bajda - My Digital Library (OverDrive Training Demo) (OH) Settings

Search OC/OU & MA by title, author, series, or publisher

Advanced search

CARTS

No pinned carts  
+ Create cart

SHOP  
One Copy/One User & Metered Access

INSIGHTS ADMIN CURATE NEWS BILLING SUPPORT FEATURED GET HELP

## Manage budgets

Review and edit your target monthly budgets for Cost Per Circ titles and external services.  
Any questions? Contact your Account Manager at [libraryteam@overdrive.com](mailto:libraryteam@overdrive.com).

Create worksheet

Page 1 of 1 Displaying 1 - 5 of 5

	Budget type	Budget cycle	Budget activated	Billing account	Total target budget	Total available budget
1	CPC Audiobook	Monthly	02/02/2021	1225-0001	\$200.00	\$200.00
2	CPC Ebook	Monthly	02/02/2021	1225-0001	\$200.00	\$192.59
3	IndieFlix	Monthly	04/26/2021	1225-0001	\$500.00	\$482.06
4	Qello Concerts	Monthly	04/23/2021	1225-0001	\$500.00	\$500.00
5	The Great Courses Library Collection	Monthly	04/19/2021	1225-0001	\$300.00	\$300.00

Notes:  
In certain situations, you can exceed your target budget.  
You will be invoiced for CPC content on a monthly basis.

© OverDrive, Inc. All Rights Reserved

[Cookie Settings](#) | [Privacy Policy](#) | [Terms and Conditions](#)

- Manage budgets for all active Cost Per Circ titles and external services
- Can also navigate to this page under:
  - *SHOP > Cost Per Circ*
  - *SHOP > Databases & streaming media*

***OverDrive***<sup>®</sup>

ebooks | audiobooks | video | magazines