

Marketplace Invoicing

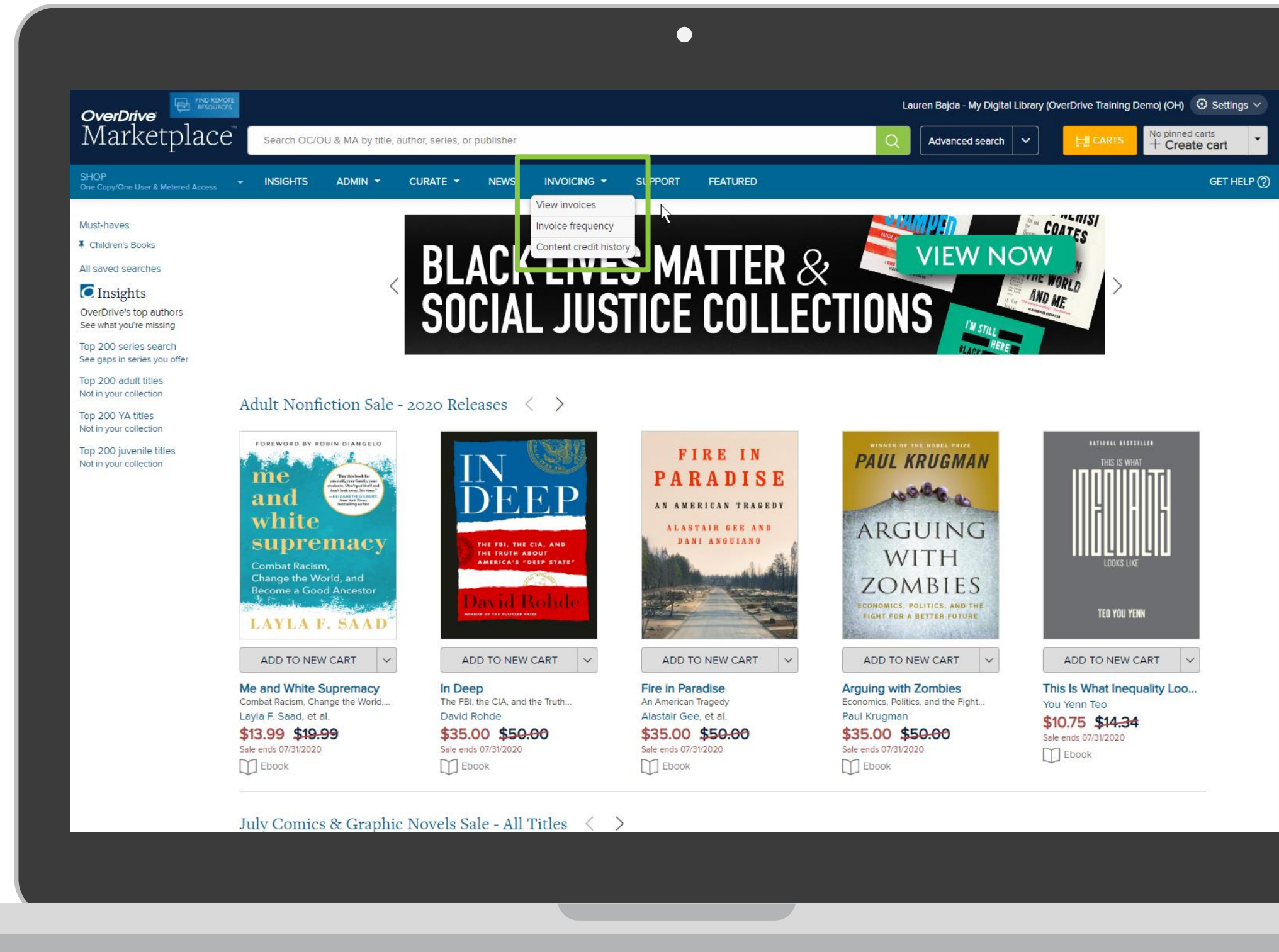
View and set preferences for invoicing in Marketplace

OverDrive[®]

Invoicing

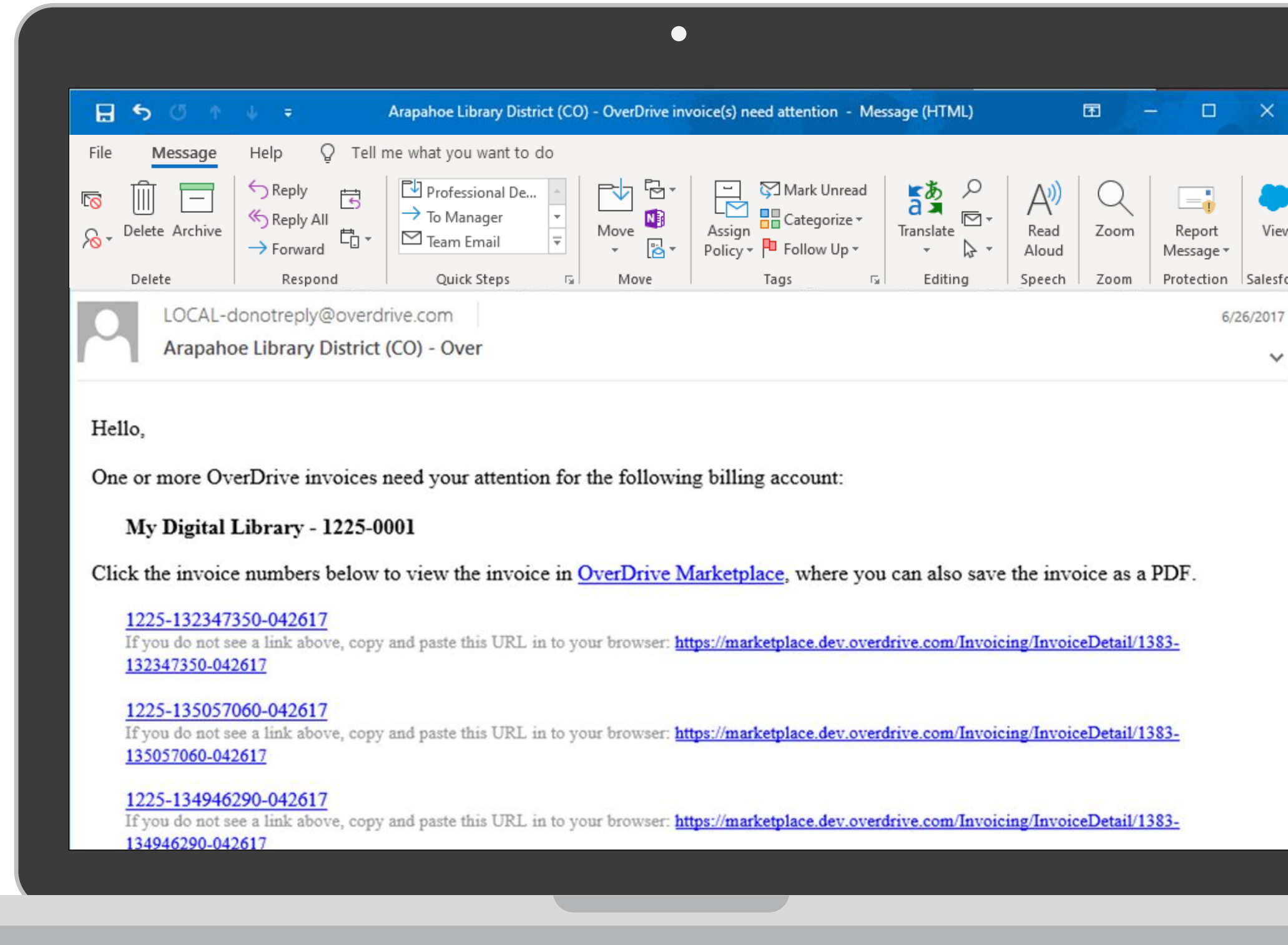
In OverDrive Marketplace, you can view invoices and payment history under the **Invoicing** tab.

Reach out to your **Account Manger** if you need the **Manage invoices / Reports** permission.



Notifications

Users with the **Manage Invoices** permission will receive email notifications about new invoices.



Recap - Invoice frequency

The screenshot shows the OverDrive Marketplace interface. 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, the page title is "Invoice frequency - 1225-0001". A sub-header explains that users can choose how often they receive invoices for One Copy/One User (OC/OU), Metered Access (MA), and Simultaneous Use (SU) content. There are two main sections: "Preorder invoice frequency" and "Standard invoice frequency". Each section contains several radio button options for different frequencies. A "SAVE" button is located at the bottom left of the form.

Important notes:

- 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.
- SU content can't be preordered, so it will only appear in standard invoices.

Preorder invoice frequency

- Daily: Give me one daily invoice that includes details about any preorder titles that reached their street dates the previous day.
- Daily by original purchase order: Give me one daily invoice per original purchase order for any preorder titles that reached their street date the previous day.
- Monthly: Give me one monthly invoice that includes details about any preorder titles that reached their street dates the previous month.
- Monthly by original purchase order: Give me one monthly invoice per original purchase order for any preorder titles that reached their street date dates the previous month.
- Monthly by original Internal purchase order ID: Give me one monthly invoice per original Internal purchase order ID for any preorder titles that reached their street dates the previous month.

Standard invoice frequency

- On creation: Give me an invoice for every standard content order.
- Daily: Give me one daily invoice that includes details about all standard titles ordered the previous day.
- Bimonthly: Give me invoices twice a month that include details about all standard titles ordered during the previous two-week period.
- Monthly: Give me one monthly invoice that includes details about all standard titles ordered the previous month.

SAVE

- Default invoice preferences will remain in place unless changed
- These preferences apply to OC/OU, MA, and SU content
- CPC plans will only provide invoices on a monthly basis

Recap - View invoices

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 INVOICING SUPPORT FEATURED GET HELP

View invoices - 1225-0001

The invoices shown below include all open invoices (regardless of date) and any invoices created on 1/1/2017 or later. All content invoices are due on receipt, and non-content invoices are due within 30 days. If you've opted to receive daily, bimonthly, or monthly invoices for preorder or standard titles, those invoices will be shown here.

Important notes:

- It may take up to five business days for invoices to appear on this page.
- Summary information on this page will remain, regardless of the status of the invoice.
- If you have any questions about invoicing, complete our [FAQ](#).
- You can pay invoices by check, credit card, or by an account.

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

* Unapplied payments can result from overpayments, early payments, or payments made to the wrong account. For more information, please contact our Accounting team by using the invoicing support form (select "Payment: Incorrect").

Date: Inception to 7/16/2020

Payment status: Unpaid, Partially paid

Flag: Any

Invoice type: All invoice types

Report options dialog:

- Period Type: Specific
- Start Date: [Empty]
- End Date: [Empty]
- Payment status: Unpaid, Partially paid
- Flag: Any
- Order ID: [Empty]
- Internal purchase order ID: [Empty]
- Invoice type: All invoice types

Buttons: Update, Cancel

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

Recap - Content credit history

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 created on 1/1/2017 or later. An "Important notes" section lists several points about invoice timing and payment methods. A "Summary" table shows zero values for available, reserved, and balance due content credit. A "Report options" modal is open, allowing users to filter invoices by period type (Last), days (30), payment status, flag (Any), order ID, internal purchase order ID, and invoice type (All invoice types). Below the modal, there's a table with filters for Date, Payment status, Flag, and Invoice type. At the bottom, there are buttons for "SAVE INVOICES TO PDF" and "PAY INVOICE(S)", along with a search bar and a message stating "Sorry, your search did not return any results." A table header is visible at the very bottom, listing columns like Order ID, Invoice date, Invoice type, Invoice number, Invoice amount, Content credit, Credit card payment, Amount due, Payment date, Payment status, and Payment history.

THANK YOU

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