Automating Metered Access Titles

Find and manage expired titles
Questions we’ll cover

1. How can I combine expiring titles into one cart?

2. How can I utilize automated carts to quickly find and manage Metered Access titles?

3. How do I automatically weed expired titles?
1. How can I combine expiring titles into one cart?
How to merge carts

1. Open Carts page

2. Select the **OD metered alert** carts you’d like to merge and click **Copy/merge cart(s)**

3. Select **Merge selected carts into a new cart**, then click **Next**

4. Enter your cart’s new name and click **Merge**

   ![Image with OverDrive interface]

You will automatically receive **OD metered alert** carts by OverDrive. These cannot be turned off at this time.
2. How can I utilize automated carts to quickly find and manage Metered Access titles?
How to run Smart Lists to manage MA titles

1. Go to Shop > Automate carts > Smart Lists

2. Add two Smart Lists:
   - MA by time
   - MA by checkout

3. Click Save

We encourage you to contact your Account Manager for personal assistance in setting up Smart Lists.
3. How do I automatically weed expired titles?
How to automatically weed expired MA titles

1. Go to Admin > Weeding
2. Click Create plan or Edit plan
3. Choose criteria to determine which titles to weed
4. Click Save

When you weed a title, you’ll need to manually remove any holds on that title.
Resources

Watch how-to videos on our Resource Center

View help articles on Marketplace Help

Download the PDF recap on our Resource Center

Contact your Account Team in Marketplace
THANK YOU

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