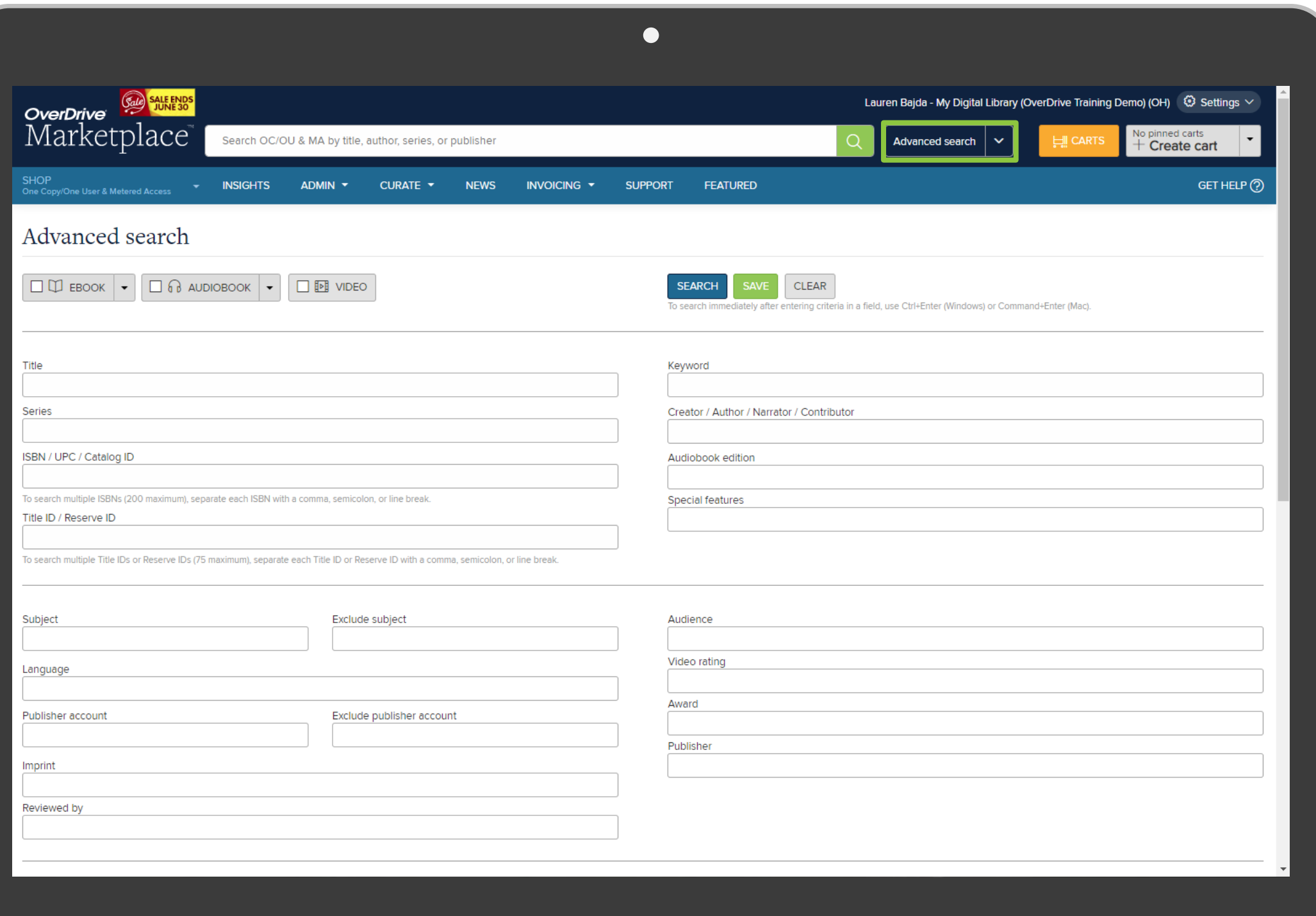


Smart Lists

How to create Smart Lists in OverDrive Marketplace

OverDrive[®]

Why Smart Lists?

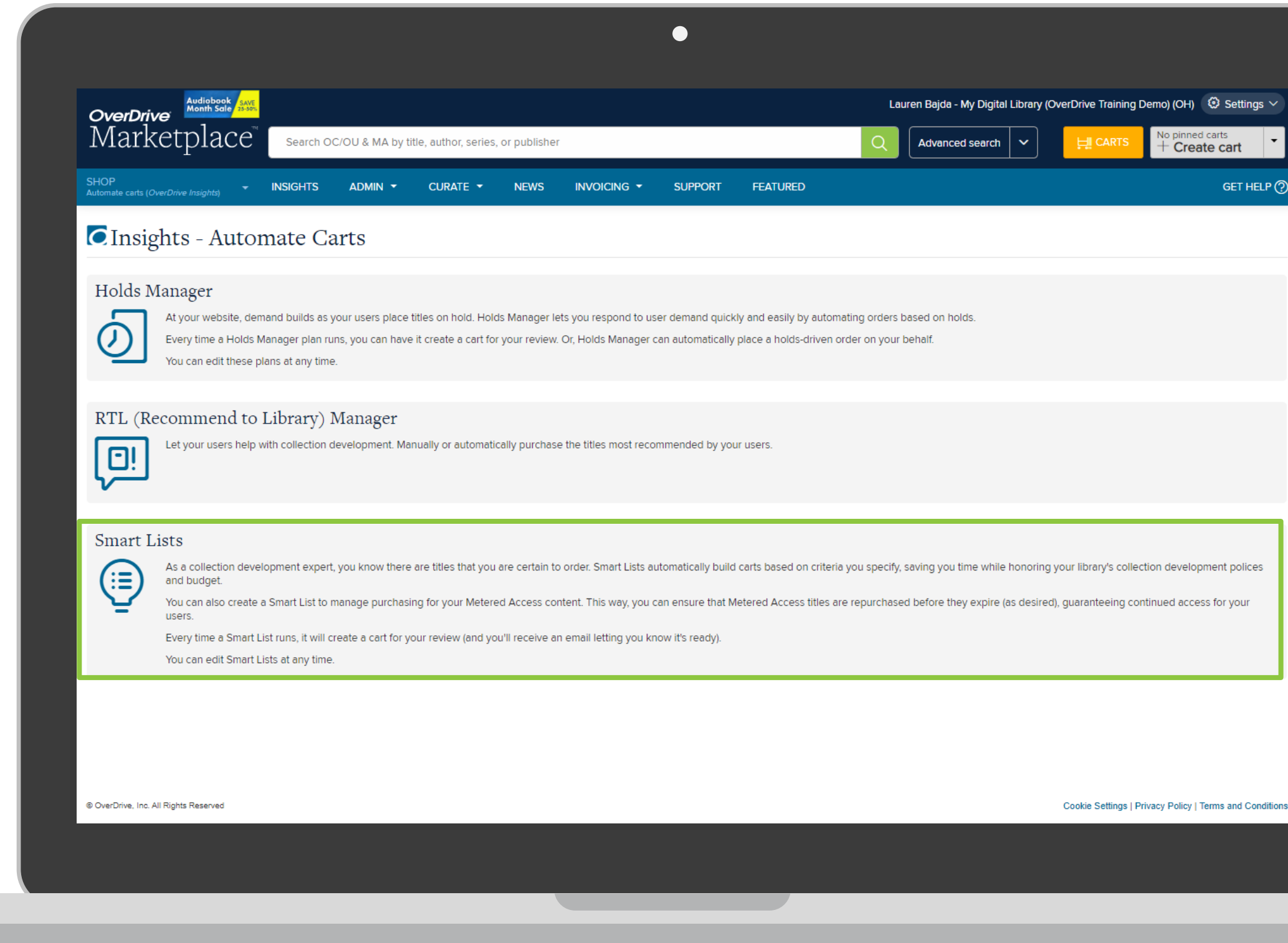


Advanced search is a great tool
when shopping for titles.

If you have more specific
needs, **Smart Lists** can help!

Smart Lists

Automatically build carts
based on **criteria you specify**
and manage purchasing for
your **Metered Access content**.



Smart List examples



MA by time



MA by checkout



Zombie holds



Top 10 Adult
Audiobooks
for July

Smart Lists

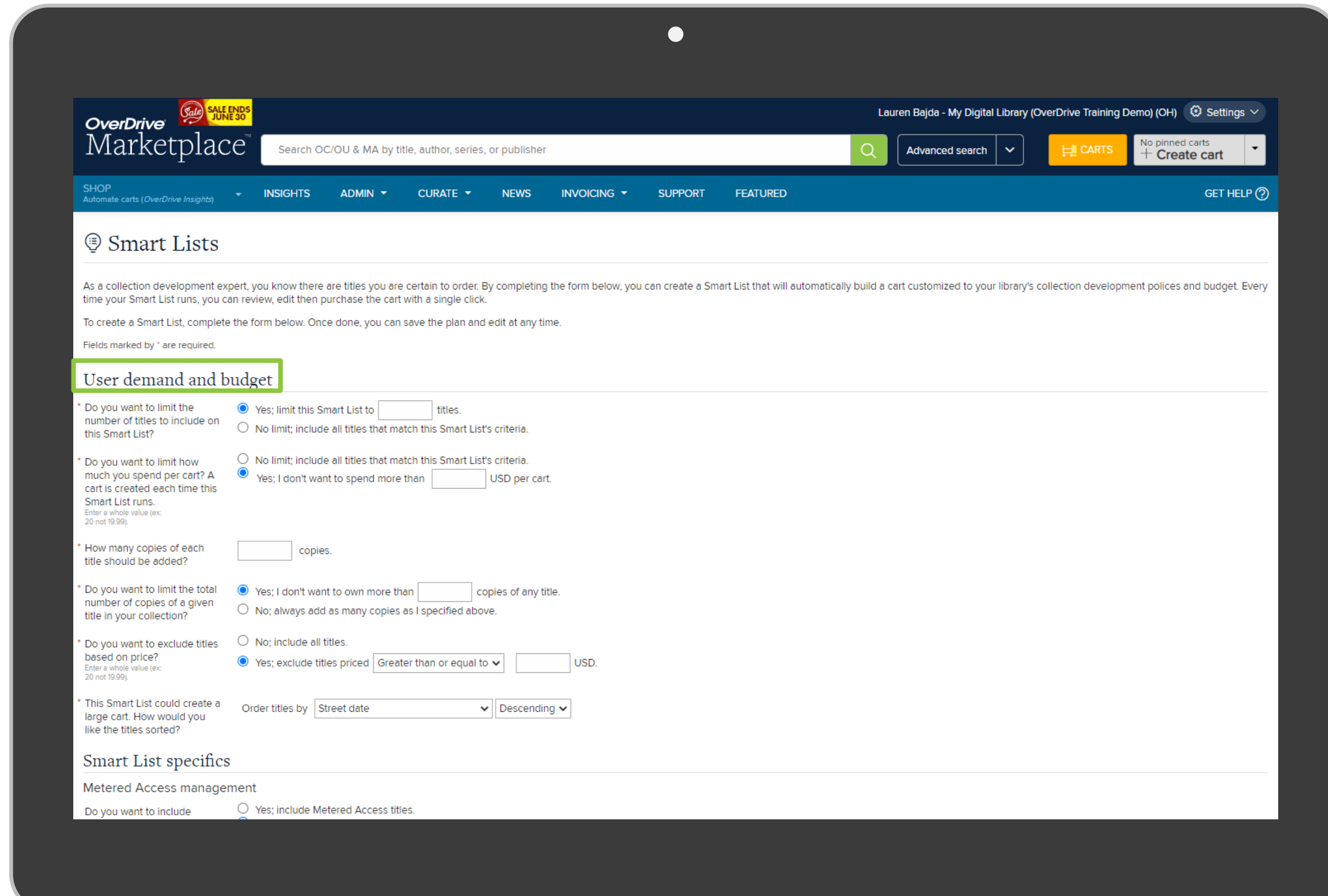
Benefits:

- ✓ Saves you time
- ✓ Keeps you on budget
- ✓ Gets new additions to your digital collection faster

The screenshot displays the OverDrive Marketplace interface. At the top, there is a navigation bar with the OverDrive logo, a search bar, and various menu items like SHOP, INSIGHTS, ADMIN, CURATE, NEWS, INVOICING, SUPPORT, and FEATURED. Below the navigation bar, the page title is "Smart Lists". A brief description explains that Smart Lists automatically build carts based on user-defined criteria to save time and honor library policies. Below the text, there are buttons for "ADD SMART LIST", "RUN NOW", "EDIT", "CREATE WORKSHEET", and "DELETE". The main content is a table listing 15 smart lists.

#	Smart List	Format(s)	Status	How often	Titles per order	Budget	Next run	Last run	Last edited by
1.	<input type="checkbox"/> Cleveland's Own	📖 📑 📚	Inactive	Daily	25	n/a	11/27/2013	6/28/2013	Becky Dobelbower
2.	<input type="checkbox"/> Expired Metered Access	📖 📑 📚	Inactive	Monthly	n/a	n/a	5/1/2016	4/1/2016	Becky Dobelbower
3.	<input type="checkbox"/> Expired with 5 holds	📖 📑 📚	Active	Daily	n/a	\$500.00	6/23/2020	6/22/2020	Briana Johnson-Sims
4.	<input type="checkbox"/> Expired with holds	📖	Active	Every 45 days	n/a	n/a	8/5/2020	6/21/2020	Heather Valentine-Gold
5.	<input type="checkbox"/> Fifty popular eBooks	📖	Inactive	Daily	50	n/a	5/5/2017	5/4/2017	Heather Valentine-Gold
6.	<input type="checkbox"/> Gavin Smart List Test	📖 📑 📚	Inactive	Daily	25	\$500.00	7/31/2016	n/a	Gavin Potter
7.	<input type="checkbox"/> Hot New Ebook Releases	📖	Inactive	Weekly	500	n/a	4/22/2016	4/15/2016	Becky Dobelbower
8.	<input type="checkbox"/> Liz's List	📖 📑 📚	Inactive	Daily	n/a	n/a	7/28/2016	7/27/2016	Becky Dobelbower
9.	<input type="checkbox"/> LW test	📖 📑	Inactive	Every 14 days	n/a	n/a	7/21/2016	n/a	Liz Isbell
10.	<input type="checkbox"/> MA by time deploy	📖 📑 📚	Inactive	Monthly	n/a	n/a	6/25/2017	5/25/2017	Becky Dobelbower
11.	<input type="checkbox"/> MA by time w/ holds	📖 📑 📚	Active	Daily	n/a	n/a	6/23/2020	6/22/2020	Lauren Bajda
12.	<input type="checkbox"/> Macmillan OC/OU	📖	Active	Weekly	n/a	n/a	6/25/2020	6/18/2020	Heather Valentine-Gold
13.	<input type="checkbox"/> Major trade eBooks	📖	Inactive	Daily	n/a	n/a	6/6/2017	6/5/2017	Becky Dobelbower
14.	<input type="checkbox"/> Majors	📖 📑 📚	Inactive	Daily	n/a	n/a	6/6/2017	6/5/2017	Becky Dobelbower
15.	<input type="checkbox"/> New Audiobooks Test	📖	Inactive	Weekly	500	n/a	11/12/2013	11/5/2013	Becky Dobelbower

Recap



Recap

Smart List specifics

Metered Access management

Do you want to include Metered Access titles? Yes; include Metered Access titles.
 No; exclude Metered Access titles.

Do you want to *only* include Metered Access titles? No; include titles in all lending models.
 Yes; include only titles in the following Metered Access lending models:

MA by time
For example, some publishers allow 12 months of circulation per copy.
- Include titles when the final copy in my collection is days or less from expiration.
- Only include titles with or more total checkouts.
- Only include titles with or more active holds.

MA by checkout
For example, some publishers allow 26 checkouts per copy.
- Include titles when checkouts or less remain in my collection.
- Only include titles with or more total checkouts.
- Only include titles with or more active holds.

General policies

Do you want to include all formats? Yes; include all formats.
 No; include only the following formats: Audiobooks
 Ebooks
 Video

Do you want to include titles based on their on sale date? No; include all titles.
 Yes; include only titles for sale in the

Do you want to add titles based on their street date? No; include all titles.
 Yes; include only titles with streetdates from:

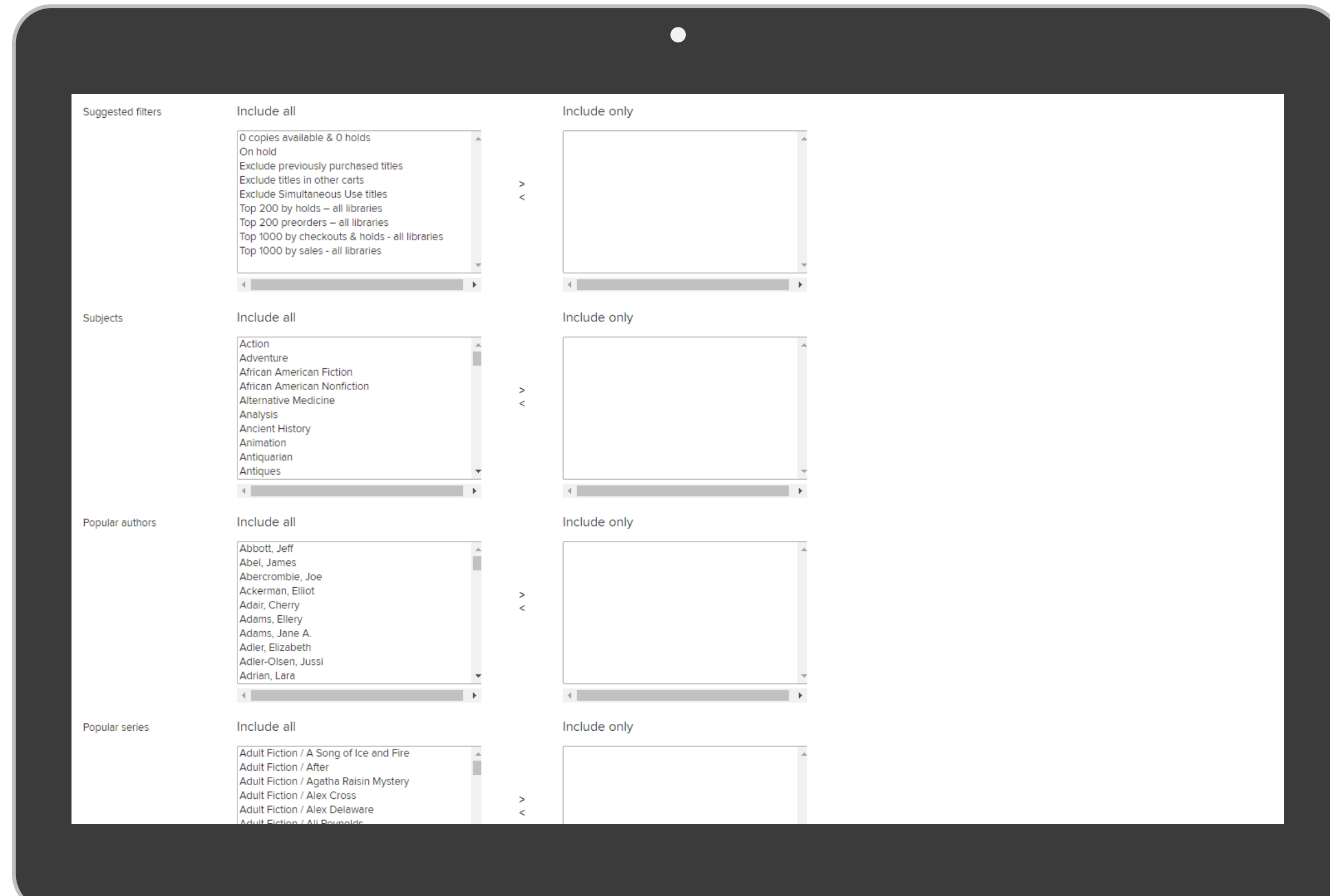
Do you want to include preorder titles? Yes
 No

Advanced filters

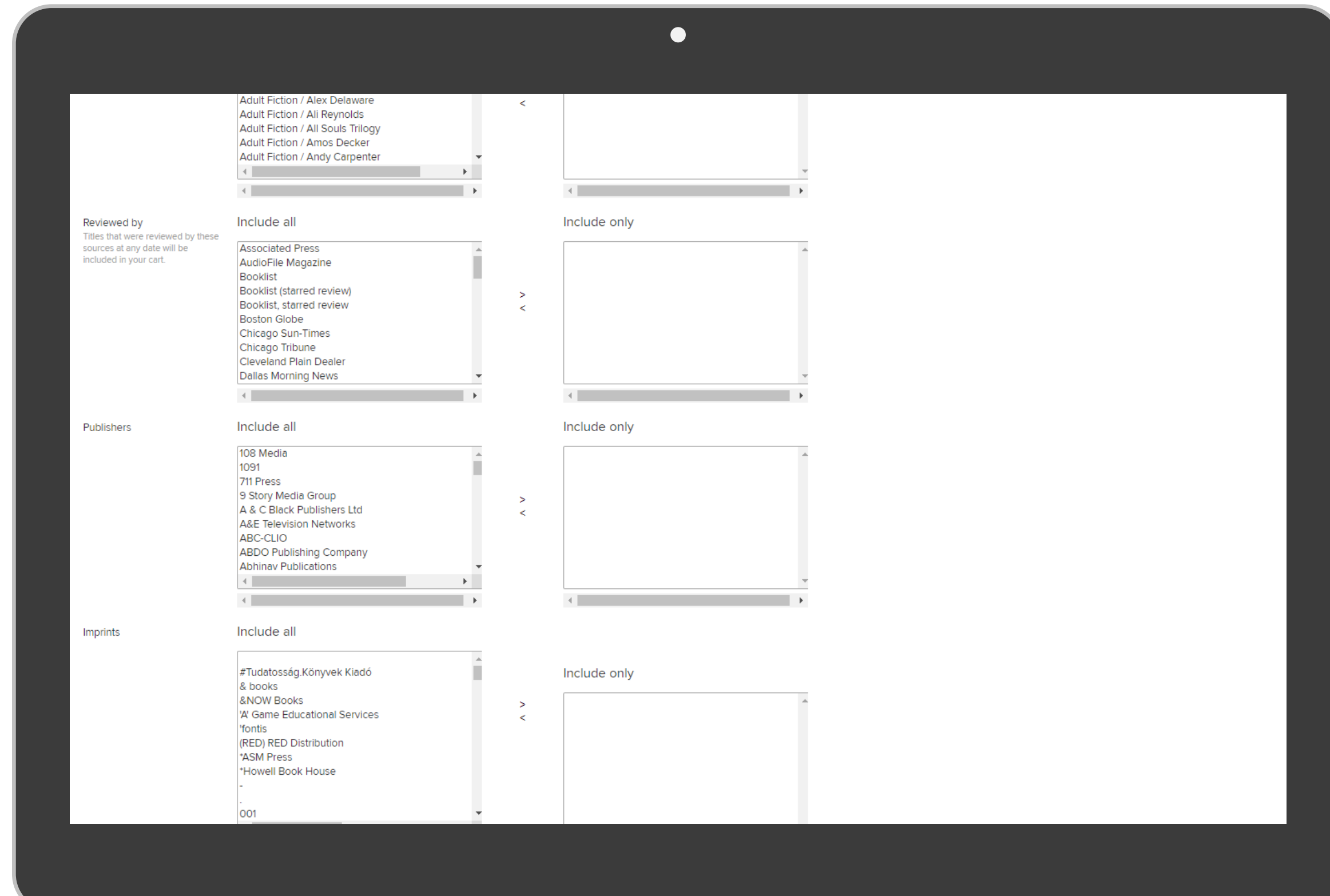
Audience

Include all		Include only
Adult Fiction		
Adult Nonfiction		
Juvenile Fiction		
Juvenile Nonfiction		
Young Adult Fiction	>	
Young Adult Nonfiction	<	

Recap



Recap



Recap

The screenshot displays the OverDrive Smart List configuration interface. At the top, there are dropdown menus for publisher selection, including (RED) RED Distribution, *ASM Press, and *Howell Book House. Below this is a 'Languages' section with two columns: 'Include all' and 'Include only'. The 'Include all' column lists various languages such as Abkhazian, Afar, Afrikaans, Akan, Albanian, Amharic, Arabic, Aragonese, and Armenian. The 'Scheduling' section, highlighted with a green box, contains the following fields:

- * Plan status: Active, Inactive
- * Name this Smart List: [Text input field]
- * On what date do you want this Smart List to run for the first time?: 6/23/2020 (with a calendar icon and the instruction 'Select a future date (tomorrow or later).')
- * After this Smart List runs for the first time, how often do you want it to run going forward?: Daily (dropdown), Every [Text input] Days
- Name the cart that will be created by this Smart List: [Text input field]
- If desired, enter an Internal purchase order ID: [Text input field]

At the bottom of the scheduling section are 'SAVE' and 'CANCEL' buttons. To the right, a blue summary card for 'Smart List: Top eBoo' displays:

- Smart List: Top eBooks for kids - 07/01/2020 (with an edit icon)
- Cart Type: Smart List
- 125 standard units
- \$3,349.65**
- Last edited on 7/1/2020 by Becky Dobelbower
- PURCHASE** button

A blue arrow points from the 'Scheduling' section to the summary card. The footer of the interface includes '© OverDrive, Inc. All Rights Reserved' and links for 'Cookie Settings | Privacy Policy | Terms and Conditions'.

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**

Smart List specifics

Metered Access management

Do you want to include Metered Access titles? Yes; include Metered Access titles. No; exclude Metered Access titles.

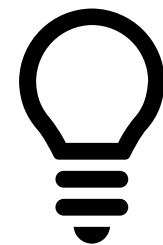
Do you want to *only* include Metered Access titles? No; include titles in all lending models. Yes; include only titles in the following Metered Access lending models:

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Watch our [how-to video](#) on automating metered access titles.

THANK YOU

OverDrive[®]