

# Getting Started with OverDrive Marketplace

How to log in and navigating the website

**OverDrive**<sup>®</sup>

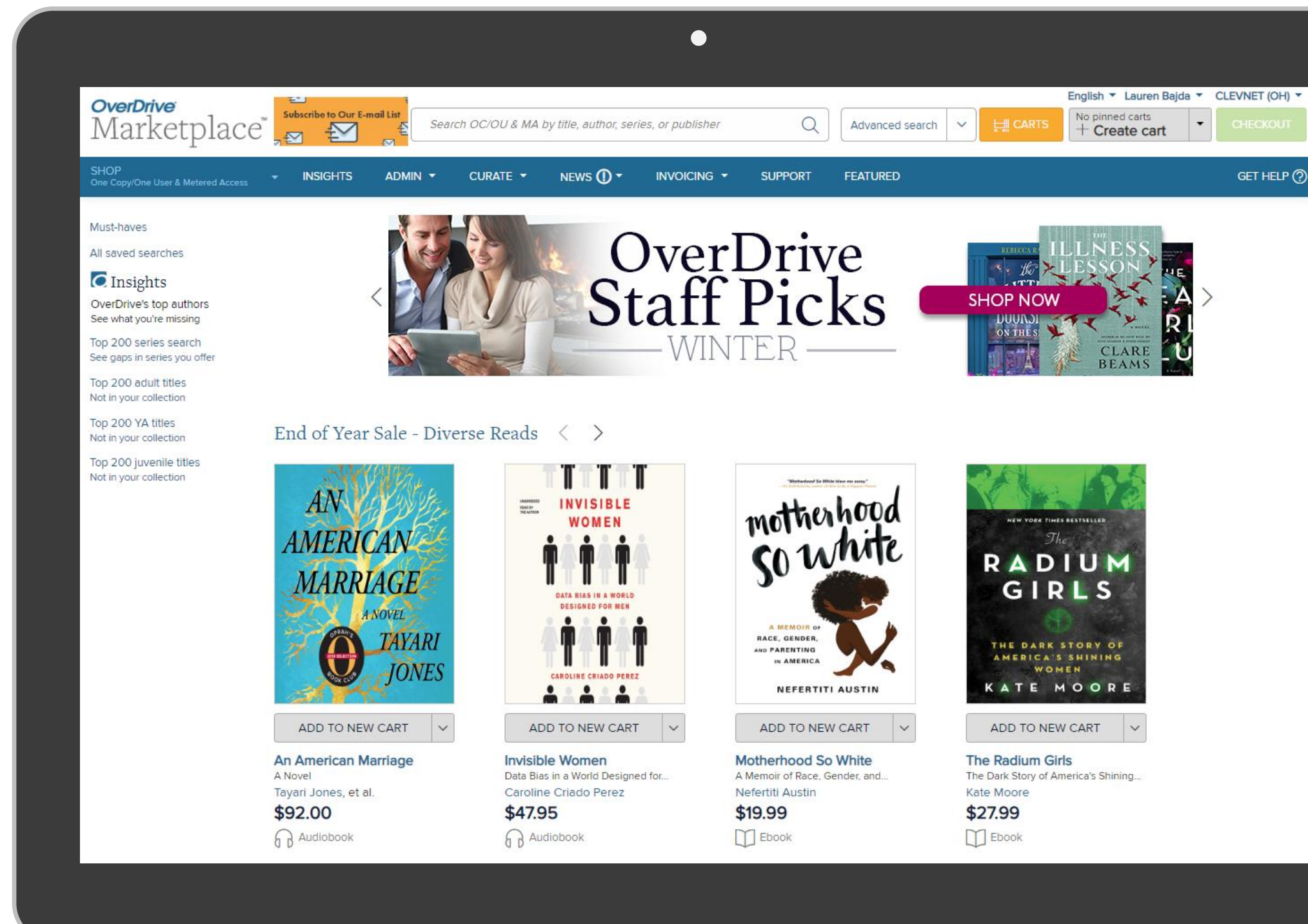
# OverDrive<sup>®</sup> Marketplace<sup>™</sup>

Over 2.9 million ebooks, audiobooks, videos and magazines\* to purchase for your digital library.

[marketplace.overdrive.com](http://marketplace.overdrive.com)

For more help and information:

[help.marketplace.overdrive.com](http://help.marketplace.overdrive.com)



# Navigating Marketplace

The screenshot displays the OverDrive Marketplace website interface. At the top, there is a navigation bar with the OverDrive Marketplace logo, a search bar, and various utility links like 'CARTS', 'CHECKOUT', and 'GET HELP'. Below the navigation bar, there is a 'Must-haves' sidebar on the left and a main content area. The main content area features a 'OverDrive Staff Picks WINTER' banner with a 'SHOP NOW' button. Below the banner, there is a section titled 'End of Year Sale - Diverse Reads' which displays four book covers with their respective titles, authors, and prices. The books are: 'An American Marriage' by Tayari Jones (\$92.00), 'Invisible Women' by Caroline Criado Perez (\$47.95), 'Motherhood So White' by Nefertiti Austin (\$19.99), and 'The Radium Girls' by Kate Moore (\$27.99). Each book listing includes an 'ADD TO NEW CART' button and an icon indicating the format (Audiobook or Ebook).

OverDrive Marketplace

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

English Lauren Bajda CLEVNET (OH)

SHOP One Copy/One User & Metered Access

INSIGHTS ADMIN CURATE NEWS INVOICING SUPPORT FEATURED GET HELP

Must-haves

All saved searches

Insights

OverDrive's top authors  
See what you're missing

Top 200 series search  
See gaps in series you offer

Top 200 adult titles  
Not in your collection

Top 200 YA titles  
Not in your collection

Top 200 juvenile titles  
Not in your collection

OverDrive Staff Picks  
WINTER

SHOP NOW

End of Year Sale - Diverse Reads

**AN AMERICAN MARRIAGE**  
A NOVEL  
TAYARI JONES  
ADD TO NEW CART

**INVISIBLE WOMEN**  
DATA BIAS IN A WORLD DESIGNED FOR MEN  
CAROLINE CRIADO PEREZ  
ADD TO NEW CART

**motherhood so white**  
A MEMOIR OF RACE, GENDER, AND PARENTING IN AMERICA  
NEFERTITI AUSTIN  
ADD TO NEW CART

**The Radium Girls**  
THE DARK STORY OF AMERICA'S SHINING WOMEN  
KATE MOORE  
ADD TO NEW CART

\$92.00 Audiobook

\$47.95 Audiobook

\$19.99 Ebook

\$27.99 Ebook



# Ways to search in Marketplace

- Quick & advanced search
- Lending models
- Must-haves
- Saved searches
- Top 200 insights
- Featured tab

The screenshot displays the OverDrive Marketplace website. At the top, there is a search bar with the text "Search OC/OU & MA by title, author, series, or publisher" and a search icon. To the right of the search bar are links for "Advanced search", "CARTS", "No pinned carts", "Create cart", and "CHECKOUT". The navigation menu includes "SHOP", "INSIGHTS", "ADMIN", "CURATE", "NEWS", "INVOICING", "SUPPORT", and "FEATURED". A sidebar on the left lists "Must-haves" and "All saved searches" with various search filters. The main content area features a "February" banner with book covers and a "End of Year Sale - Diverse Reads" section with four book listings: "An American Marriage" by Tayari Jones, "Invisible Women" by Caroline Criado Perez, "Motherhood So White" by Nefertiti Austin, and "The Radium Girls" by Kate Moore. Each listing includes an "ADD TO NEW CART" button and the book's price.

# Refining and understanding results

## Refine search results:

- Filter
- Edit
- Sort

## Understand title information:

- Review title information
- See if it's owned or pending
- View stats at shared collection or advantage level

The screenshot shows the OverDrive Marketplace interface. At the top, there's a search bar with the text "Search OC/OU & MA by title, author, series, or publisher". Below the search bar, there are navigation tabs: SHOP, INSIGHTS, ADMIN, CURATE, NEWS, INVOICING, SUPPORT, and FEATURED. The main content area displays search results for "Where the Crawdads Sing" and "Educated".

**Search Results Summary:**

- 99,999+ results (Edit search)
- Sort options: Most popular across libraries, Most recent street date, Highest holds ratio, Most holds, Title A-Z, Lowest price, More... (50 items per page)
- Filters: Applied filters (3): Format (Ebook), Audience (Adult Fiction, Adult Nonfiction)

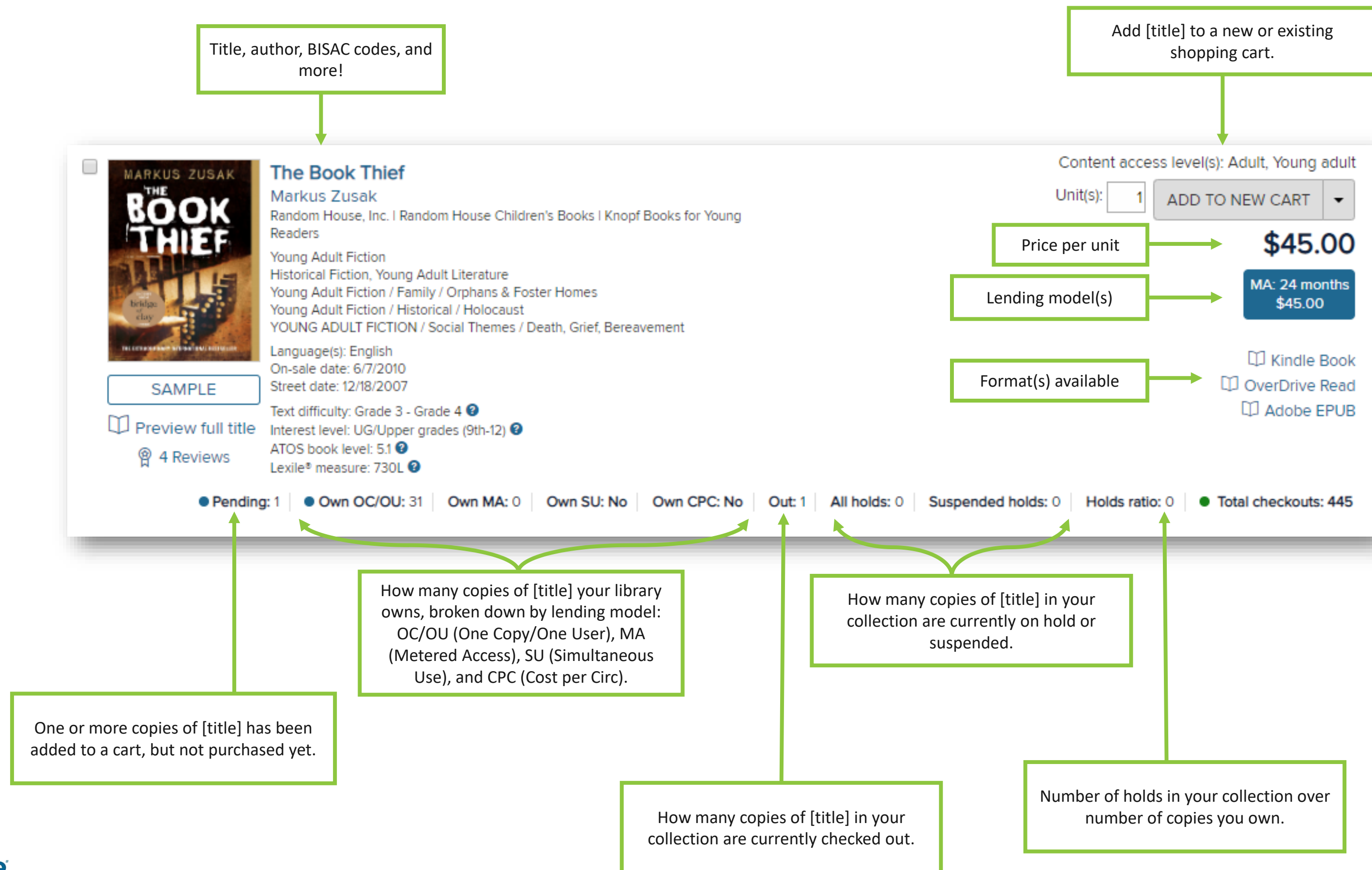
**Title 1: Where the Crawdads Sing**

- Author: Delia Owens
- Publisher: Penguin Group (USA), Inc. | Penguin Publishing Group | G.P. Putnam's Sons
- Category: Adult Fiction, Literature, Fiction / Literary, Fiction / Coming of Age, Fiction / Contemporary Women
- Price: \$55.00 (MA: 24 months)
- Options: Kindle Book, OverDrive Read, Adobe EPUB
- Stats: Own OC/OU: 8, Own MA: 170, Own SU: No, Adv Plus shared: 163, Own CPC: No, Lucky Day copies: 0, Out: 177, All holds: 151, Suspended holds: 15, Holds ratio: 0.4, Total checkouts: 5876

**Title 2: Educated**

- Author: Tara Westover
- Publisher: Random House, Inc. | Random House Publishing Group | Random House
- Category: Adult Nonfiction, Biography & Autobiography, Religion & Spirituality, Biography & Autobiography / Religious, Biography & Autobiography / Women, Biography & Autobiography / Personal Memoirs
- Price: \$55.00 (MA: 24 months)
- Options: Kindle Book, OverDrive Read, Adobe EPUB
- Stats: Advantage: Own OC/OU: 12, Own MA: 151, Own SU: No, Own CPC: No, Lucky Day copies: 3, Out: 163, All holds: 138, Suspended holds: 14, Holds ratio: 0.37, Total checkouts by Adv. users: 5448

# Understanding title information



# Creating carts

The screenshot shows the OverDrive interface with a modal window for adding a book to a new cart. The modal is titled "Add Big Nate: Silent But Deadly to new cart". It contains the following fields and options:

- Name:** Juv Fiction Spring
- Description:** Juvenile fiction titles to be added this spring.
- Pin as main cart
- Lock to prevent changes by others

The "CREATE" button is highlighted in green. The background shows a search results page for "Big Nate: Silent But Deadly" with a price of \$14.99 and a "Narwhal: Unicorn of the Sea" with a price of \$35.00.

## How to create a cart:

1. Click **Create Cart** at top of screen *or* select a title and click **Add to New Cart**.
2. Create a unique and meaningful name.
3. Add titles.



*You can create as many carts as you like, but you can only pin five carts at a time (per lending model).*



# Editing carts

The screenshot shows the OverDrive Carts page. At the top, there is a search bar and navigation links for 'CARTS', 'Read-along favorites', and 'CHECKOUT'. Below the search bar, there are buttons for '+ CREATE CART', 'COPY/MERGE CART(S)', 'CREATE WORKSHEET', and 'DELETE CART(S)'. The main content area displays a grid of cart items, each with a pencil icon for editing. The items shown are:

- #ReadWoke**: Books suggested #ReadWoke / Cicely the ...  
Cart Type: Select List  
94 standard units  
TBD  
Last edited on 8/12/2019 by Sheila Henline
- Battle of the Books**:  
Cart Type: Select List  
65 standard units  
\$2,013.13  
Last edited on 10/3/2019 by Jody Brookshire
- Read Out Loud ES**:  
Cart Type: Select List  
88 standard units  
\$1,971.46  
Last edited on 10/8/2019 by Jody Brookshire
- Burk Elementary**:  
Cart Type: Select List  
31 standard units
- Burke County Middle**: Middle School Starter  
Cart Type: Select List  
267 standard units
- Camden City School**: Sheila for Tracy  
Cart Type: Select List  
56 standard units

At the bottom right, there is a 'Sort by: Name' dropdown menu.

## How to edit a cart:

1. Go to **Carts** page and click the **pencil** icon on the cart you want to edit.
2. Open the cart to edit the carts contents.



*Carts are automatically deleted when they meet one of seven criteria.*

Visit [help.marketplace.com](https://help.marketplace.com) to learn more.



# Reviewing carts

## How to review a cart:

1. Click on cart to view cart details page.
2. From here you can:
  - Update # of copies
  - Create worksheet
  - Copy, move, and delete titles
  - Add/remove columns
  - Expand and sort columns
  - Review title information
  - Create quote

#ReadWoke - Cart details Unlocked

[CREATE QUOTE NEW](#) [PURCHASE CART](#)

Standard units total: **\$117.94**  
At checkout, you can either pay this total by credit card or request an invoice.

Cart ID#	5158108	Standard units	3
Cart type	Select List	Standard titles	3
Last edited	1/16/2020 by Lauren Bajda	Standard total	\$117.94
Total units	3	Preorder units	0
Total titles	3	Preorder titles	0
Holds	32 / 30	Preorder total	\$0.00

[EDIT CART](#) [CREATE WORKSHEET](#) [COPY TITLE\(S\)](#) [MOVE TITLE\(S\)](#) [DELETE TITLE\(S\)](#)

Set all titles to  copies [UPDATE](#) (# / # = cons. / all adv.) [Sort by](#)

Notes:  
For standalone libraries: "Total checkouts" is the sum of all checkouts of this title by your end users.  
For members of consortia: "Total checkouts" is the sum of all checkouts of consortium copies of this title by any members of your consortium.  
Total checkouts and latest checkout are updated nightly.

\*Checkouts remaining\* is the number of checkouts remaining for your MA (Metered Access) units, if those units are metered by checkout.

**Adding and removing columns**  
You can add or remove columns in your carts at any time. To add or remove columns, click **Add/remove columns** below, then click the button(s) for the column(s) you would like to add or remove. Blue buttons are active columns and white buttons are columns that have been removed.

[ADD/REMOVE COLUMNS >](#)

	Titl...	Edi...	ISBN	Cre...	Au... Rat...	Su...	Lan...	Pu...	For...	Len... mo...	Pre... revi...	Pen...	Dates				Own												
													On sale	Street	First copy bought	Last copy expires	Cons MA units	Adv MA units	Cons checkouts remaining	Adv checkouts remaining	Cons OC/OU units	Adv OC/OU units	C... SU	A... SU	C... C...	A... C...	Adv Plus Shared	Total check...	Adv checkouts
<input type="checkbox"/>	1 Invis... Wo... Data Bias in a World Desi... for Men (una...	Una...	9781...	Caro... Criado Perez	Adult Nonf...	Soci... Wo... Stud...	Engl...	Blac... Audio, Inc.	OverDrive MP3, OverDrive Listen	OC/...	1	0	4/1/2019	6/25/2019	6/26/2019	n/a	0	0	0	0	4999	1003	N	N	N	N	1003	66	0
<input type="checkbox"/>	2 Mot... So White: A Mem... of Race, Gen... and Pare... in Ame...		9781...	Nefe... Austin	Adult Nonf...	Afric... Ame... Nonf... Biog... & Auto... Family & Rela...	Engl...	Sour...	Kindle Book, OverDrive Read, Adobe EPUB, Adobe PDF	OC/...	3	0	8/28/2019	9/23/2019	8/27/2019	n/a	0	0	0	0	0	2	N	N	N	N	2	8	0

\*A cart's total will be "TBD" if you haven't yet chosen a lending model for one or more titles in the cart.

# Purchasing carts

The screenshot shows the checkout page for a purchasing cart. At the top, there is a navigation bar with a search bar, a 'CARTS' button showing a cart icon and '\$167.94', and a 'CHECKOUT' button. Below the navigation bar, there is a section for 'Special conditions' with three checked checkboxes: 'Titles from the following publisher(s) are metered for the earlier of 52 checkouts or 24 months from the date of purchase: W. W. Norton & Company', 'This order is final. Due to the nature of digital media, titles in this order cannot be returned.', and 'Once this purchase is finalized, the order will be processed immediately and the titles in it will be available on your OverDrive website within 24 hours. If users have these titles on hold, they will be alerted that their holds are available.' There is also a checkbox for 'By clicking "Complete purchase," I accept delivery of this order and acknowledge that I will be charged \$167.94 USD for standard titles.' Below this is an 'Internal purchase order ID (optional)' field. The 'Select payment method' section has three radio button options: 'Pay \$167.94 USD now by bank account', 'Pay \$167.94 USD now by credit card', and 'Bill my account'. A green 'COMPLETE PURCHASE' button is at the bottom left, with a mouse cursor hovering over it. At the bottom right, there are links for 'Cookie Settings', 'Privacy Policy', and 'Terms and Conditions'.

## How to purchase a cart:

1. Click **Purchase cart**.
2. Read and confirm the purchase conditions.
3. Choose a payment method and follow the prompts to complete your order.



*Your library won't be invoiced for preorder titles until they reach their street dates.*

# Curate collections

The screenshot shows the OverDrive Marketplace interface. At the top, there is a navigation bar with the OverDrive Marketplace logo, a search bar, and a CURATE menu. The CURATE menu is open, showing options: Standard curation, Lucky Day, and Organize published collections. Below the navigation bar, there is a section for 'Standard collections' with a 'CREATE STANDARD COLLECTION' button. Below that, there is a section for 'Published standard collections' with a table of collections.

**Standard collections**

Select **Create standard collection** to create automated or curated collections of titles you own, then publish them to your OverDrive website. This is a great way to showcase your content and boost circulation.

[Learn more about curation.](#)

[CREATE STANDARD COLLECTION](#)

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**Published standard collections**

The collections below are the standard collections that are currently live on your site.

	Name	Mapped to	Description	Curator	Titles	Type	Published on	Draft
<input type="checkbox"/>	1 <a href="#">Michigan Connections</a>	Main site - Home page		Up North Michigan Consortium	64	Curated	4/30/2018	
<input type="checkbox"/>	2 <a href="#">Indie Author Project</a>	Main site - Home page		Up North Michigan Consortium	110	Curated	7/8/2019	
<input type="checkbox"/>	3 <a href="#">Dystopian Favorites for Kids &amp; ...</a>	Kids - Home page		Up North Michigan Consortium	114	Curated	8/2/2018	
<input type="checkbox"/>	4 <a href="#">Has Anyone Seen My Shirt?</a>	Main site - Home page		Up North Michigan Consortium	83	Curated	9/3/2019	
<input type="checkbox"/>	5 <a href="#">Humor Me</a>	Main site - Home page		Up North Michigan Consortium	183	Curated	9/3/2019	
<input type="checkbox"/>	6 <a href="#">Read these Dramas about Mam...</a>	Main site - Home page	Family Drama/Sagas	Up North Michigan Consortium	108	Curated	9/3/2019	
<input type="checkbox"/>	7 <a href="#">RX for Literature - Medical Fiction</a>	Main site - Home page		Up North Michigan Consortium	34	Curated	1/3/2019	
<input type="checkbox"/>	8 <a href="#">Meow-der: Cat Cozy Mysteries</a>	Main site - EBOOKS, Main site - ...		Up North Michigan Consortium	41	Curated	3/5/2019	
<input type="checkbox"/>	9 <a href="#">True Crime Lovers Rejoice!</a>	Main site - Home page, Main sit...		Up North Michigan Consortium	112	Curated	7/16/2019	

# Automated carts


The screenshot displays the OverDrive Marketplace interface. At the top, there is a navigation bar with the OverDrive Marketplace logo, a search bar with the placeholder text "Search OC/OU & MA by title, author, series, or publisher", and a "CARTS" button. Below the navigation bar, the "INSIGHTS" menu item is highlighted, and the page title is "Insights - Automate Carts". The main content area features three sections: "Holds Manager", "RTL (Recommend to Library) Manager", and "Smart Lists". Each section includes an icon and a brief description of the feature.

**OverDrive Marketplace™** [Subscribe to Our E-mail List](#)  [Advanced search](#) [English](#) [Jolene MNonfiction](#) [Up North Michigan Consortium \(MI\)](#) [CARTS](#) [No pinned carts](#) [+ Create cart](#) [CHECKOUT](#)


[SHOP](#) [Automate carts \(OverDrive Insights\)](#) [INSIGHTS](#) [CURATE](#) [NEWS](#) [INVOICING](#) [SUPPORT](#) [FEATURED](#) [GET HELP](#)

## Insights - Automate Carts


### Holds Manager

 At your website, demand builds as your users place titles on hold. Holds Manager lets you respond to user demand quickly and easily by automating orders based on holds. Every time a Holds Manager plan runs, you can have it create a cart for your review. Or, Holds Manager can automatically place a holds-driven order on your behalf. You can edit these plans at any time.

### RTL (Recommend to Library) Manager

 Let your users help with collection development. Manually or automatically purchase the titles most recommended by your users.

### Smart Lists

 As a collection development expert, you know there are titles that you are certain to order. Smart Lists automatically build carts based on criteria you specify, saving you time while honoring your library's collection development polices and budget. You can also create a Smart List to manage purchasing for your Metered Access content. This way, you can ensure that Metered Access titles are repurchased before they expire (as desired), guaranteeing continued access for your users. Every time a Smart List runs, it will create a cart for your review (and you'll receive an email letting you know it's ready). You can edit Smart Lists at any time.



# Marketplace Insights

Summary of current holdings and collection activity.

Customize the date range to see updated figures in the summary.

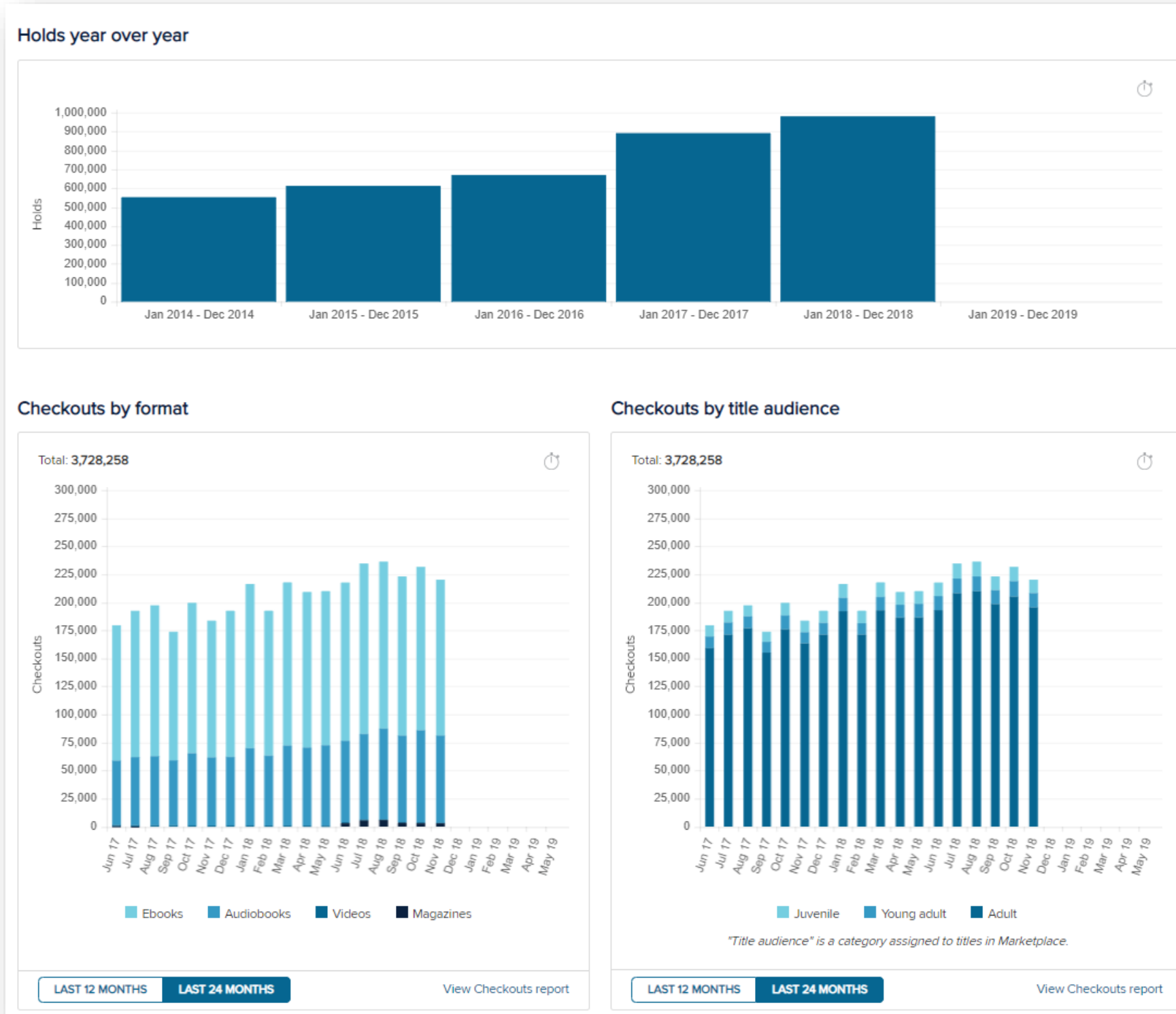
The screenshot shows the OverDrive Marketplace Insights dashboard. At the top, there is a navigation bar with 'SHOP', 'INSIGHTS', 'ADMIN', 'CURATE', 'NEWS', 'INVOICING', 'SUPPORT', and 'FEATURED'. A search bar is located in the top right, and a 'CARTS' button is visible. The main content area is titled 'Insights' and features a 'Summary' card with three key metrics: 1.446M Total checkouts, 563,777 Total holds, and 56,187 Total unique users. Below the summary is a 'Current holdings' section with a table of holdings by format.

FORMATS	TITLES	COPIES
Ebook	155,722	284,222
Audiobook	37,216	87,110
Video	4,072	4,582
Magazine	384	384
TOTAL	197,394	376,298

# Marketplace Trends

At-a-glance insight into activity over time.

Hover over bars and data points on each graph to see exact numbers.



# Marketplace goals

Measure the performance of your digital collection with quarterly goals.

SHOP  
One Copy/One User & Metered Access

INSIGHTS ADMIN CURATE NEWS INVOICING SUPPORT FEATURED

Jump to: Insights Trends **Goals**

Start typing to find a report

Popular reports

- Checkouts
- Current holds
- Purchase orders
- Title status & usage

Title activity reports

Purchase & orders reports

User activity reports

## Library goals

Below are your library's goals for this quarter (ending on **June 30, 2019**). Your quarterly goals are created uniquely by reviewing approximately two years of past performance to identify annual, seasonal and monthly trends in your digital collection's behavior. Those three trends are combined, weighted and used to create a quarterly forecast. Be sure to check back regularly to track your progress. OverDrive is here to help you achieve your goals, so please contact your Account Manager or email [libraryteam@overdrive.com](mailto:libraryteam@overdrive.com) anytime for assistance!

Goal Category	Goal	Current Status	Projection
<b>Circulation</b> Checkouts for this quarter	743,824	82,930 (11.15% of goal)	100.00%
<b>Users</b> Number of users who borrowed a title this quarter	56,902	26,405 (46.40% of goal)	104.41%
<b>Average waiting period</b> Average number of days a user waits for a title on hold	46.02 days	48.44 days	48.44 days

Review your library's goal history by quarter

Best practices to maximize digital circulation

Interested in setting your own goals?

Describe any goals you'd like to see for your library...

# MARC record ordering preferences

## Where?

[marketplace.overdrive.com](https://marketplace.overdrive.com).

Admin > MARC preferences

## What?

Choose whether to order MARC records for each lending model.

Explore your options for MARC record providers, and verify your current provider.

*Note: This task requires 'MARC preferences' permission.*





# MARC Express deliveries

## Where?

[marketplace.overdrive.com](https://marketplace.overdrive.com).

Admin > MARC Express deliveries

## What?

Search deliveries to find, select, and download MARC Express deliveries.

Create custom file to search for specific titles and download those records.

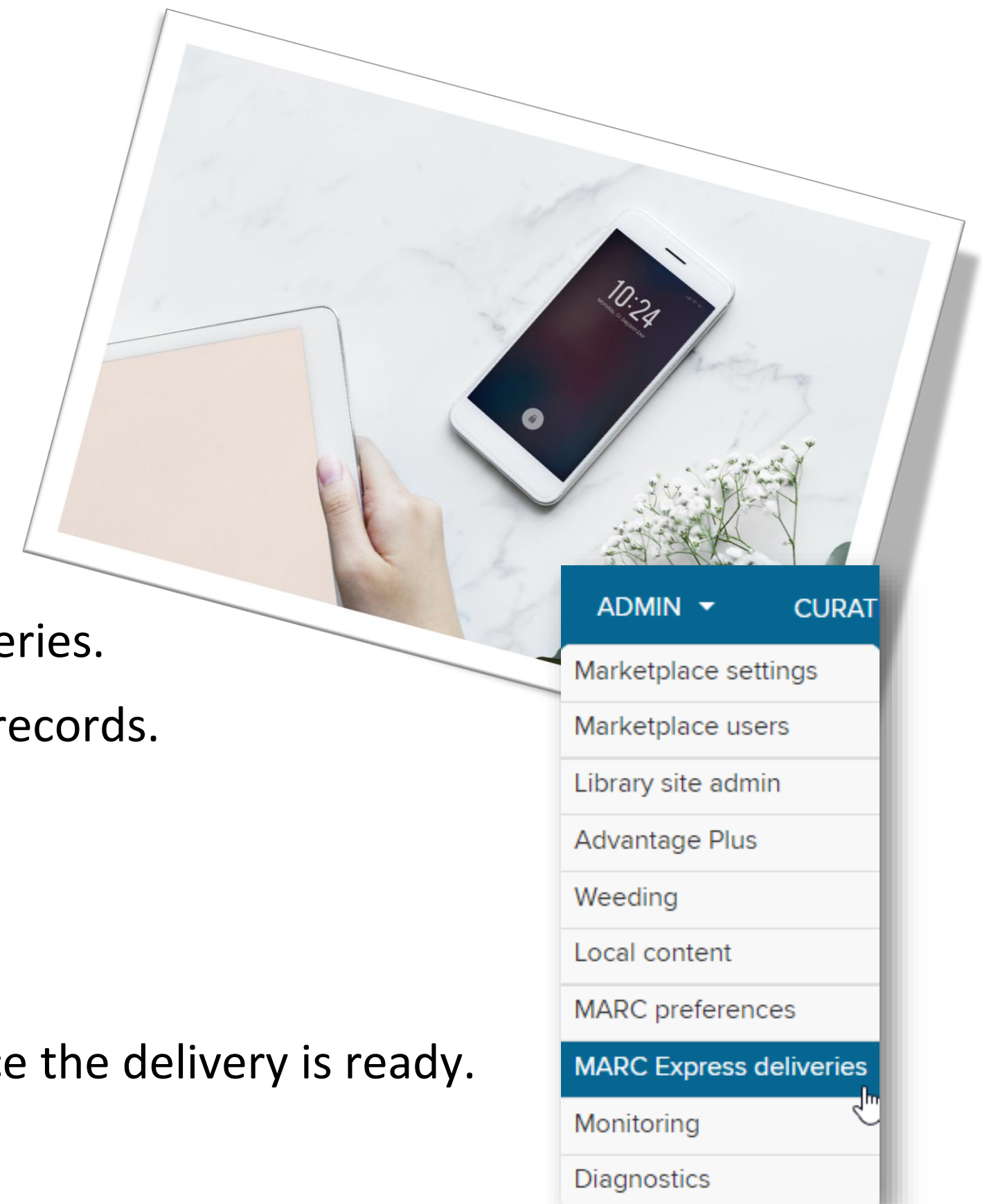
Create backdated file to download all records in your collection.

## Notes

You'll receive one delivery per day and will be notified by email once the delivery is ready.

Records are downloaded in a .zip folder.

See all titles in a order by clicking on the hyperlinked delivery date in the search results.



# Resources

## Learn more

Marketplace help - [help.marketplace.overdrive.com](https://help.marketplace.overdrive.com).

Resource Center - [resources.overdrive.com](https://resources.overdrive.com).

## Contact us

Contact your Account Manager:

**Daiva Madjar**

[dmadjar@overdrive.com](mailto:dmadjar@overdrive.com)

216.573.6886 x 1246



Join our  
email list  
today!

OverDrive Resource Center Library K-12 Schools Higher Education Corporate Search for...

## Libraries

### Marketing & Outreach

We are here to help you get the word out about your OverDrive collection with free print and digital assets, communication templates, and programming & event ideas.

» Explore

### Staff Training

Sign-up for live webcasts, download training templates, and view on-demand staff training recordings any time of the day or night.

» Explore

### Collection Development

View recommended lists created by our Collection Development Librarians to help find the best titles for your digital collection based on reviews, media coverage and more. Plus, learn about the latest sales in OverDrive Marketplace to get the most bang for your buck!

» Explore

### Apps & Features

Learn about apps, features, and service enhancements to maximize your digital collection and reach more users.

» Explore

thank you

THANK YOU

*OverDrive*<sup>®</sup>