

# Marketplace Quick Reference Guide

Manage Account - Order Activity Report

## Marketplace: Manage Account—Order Activity Report

Account administrators can view activity reports for all orders placed on their organization's account. This guide will provide instructions for creating reports, to gain insight into your overall account activity.

#### Log on by visiting: <u>http://marketplace.copyright.com</u>

#### 1. Open Reports Interface

- After signing into your account, select **Reports** from the drop-down menu, next to your name at the top right of the application:
- The **Reports** tab on the **Manage Account** page will display the **Order Activity Report** interface.
- NOTE: Account-level reports are only available to account administrators. Individual users can use "View Orders" to view their individual orders.

View Orders Special Requests View & Pay Invoices Projects Reports Account Settings Sign Out

### 2. Search by Order Information

- You can search for orders in multiple ways. To begin, enter or select one or more of the search parameters described below.
- **Order Number**. If you know the order number, type it into the box.
- Order Date Range. Use the From: and To: calendar boxes to specify a date range for the orders.
- Order Type. Use the drop down to filter the report to specific types of orders, such as Print Permissions or Republication Permissions. Select one or more order types from the drop-down list.

All
✓ All
Print Permissions
O Print Course Materials Permissions
<ul> <li>Digital Permissions</li> </ul>
O Digital Course Materials Permissions
Republication permissions

View Your Orders	Special Requests View & P	Pay Invoices Projects Reports	Manage Account Settings	
Order Activity Report				
Order number:		Invoice number:		
Order date range:	From:	Invoice date range:	From:	
	То:	ii ii	To:	
Order type:	All	- Project name:		
Order detail status:	All	<ul> <li>Start of term date range:</li> </ul>	From:	
ISSN/ISBN:			To:	
Publication title:				

# 2. Search by Order Information (Continued)

- Order Detail Status. You can search by order status, such as Invoiced or Canceled. Select one or more order statuses from the drop-down list.
- ISSN/ISBN/Publication Title. If you have publication information, such as the Publication Title, enter it in the box.
- Begin Search. Once you have entered/selected the order information to search, click on Submit to download the report as a .CSV file. You can open the report in Excel or another spreadsheet application.

#### 3. Search by Invoice/Project Information

- You can also search by invoice or project information. To begin, enter or select one or more of the search parameters below.
  - $\Rightarrow$  Invoice Number/Date Range.
  - $\Rightarrow$  Project Name/Start of Term.
- Begin Search. Once you have entered invoice/project information to search, click on Submit to download the report as a .CSV file. You can open the report in Excel or another spreadsheet application.

#### **Questions?**

For general questions: Search the Knowledgebase or Contact Customer Service



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