



Infobase Learning

2013 AMS Summary

The following list summarizes the key changes that were made to the Account Management System (AMS) during 2013. Additional bug fixes and minor enhancements are not included in this list.

New Features/Enhancements

1. AMS Remote Access URL: ams.infobaselearning.com
2. New Multi-Year Order Wizard
3. New Attach-a-File Feature
4. New Admin Tools – Order Correction Options for Sales Managers
5. New and Modified Credit/Edit Options
6. New AMS Help Center

Account Data

1. eBook accounts (subscription collections only) added to the AMS
2. Vault Career Insider accounts/subscriptions/orders added to the AMS
3. Market/Org Type Data Broken into two separate fields
4. Market/Org Type Assignment Data Cleaned Up
5. MDRPID introduced as a required field for all accounts
6. Imported all MDR K-12 Districts
7. Imported all MDR K-12 Schools (83,743 new accounts)
8. Added Library Website URL

Order Data

1. Multi-Year Order Data Cleaned Up
2. Learn360 Order Data Cleaned Up
3. New “Decision Maker” Field Introduced to Order Wizard

Products

1. eBook Accounts Added to AMS for Subscription/Trial/Orders
2. Vault Career Insider Accounts Added to AMS For Subscription/Trial/Orders
3. New FOD Collections added to AMS: Subjects (30), International (3), Nursing (1)
4. Learn360 US Collection added to AMS
5. Learn360 International Collection added to AMS
6. AVOD Canadian Collection added to AMS

Messaging

1. Internal Order confirmation email now CC's the District Account Rep on individual K-12 school orders (these are internal only emails)
2. The Decision Maker Sales Rep is now CC'ed on any new or renewal order internal email notifications
3. Order / Trial Submission emails now CC the Independent Rep when applicable
4. Automated Renewal Reminder Emails now only show the products that did not decline/renew
5. Automated Renewal Reminder Emails now CC Bob Taylor on the Day Of Expiration Message

Accounts - General

1. Usage Stats link now available for the Learn360 Product if the customer has access and a verified Location ID

Accounts – Orders Tab

1. New Expire Date Month/Year Filter has been added to the Order History tab
2. Orders now display both the Account's Sales Rep and Rep Who Placed the Order
3. Orders now display in the Recipient Account's Order History tab in addition to the Billing Account's Order History tab.

Order Wizard

1. The Sales Rep now displays when selecting a Decision maker in the Order Wizards
2. The Decision Maker Account now displays on the Order Forms
3. Updated the Wizards to allow for New/Renewal products to be selectable regardless of previous orders – only for Consortia/District Accounts
4. The Notes field on all Orders was separated into Access Notes and Billing Notes

Reports

1. Renewal Letter Report now contains Decision Maker Address information
2. Reporting Wizard: Expired Status filter now only looks for the most current subscription of your selected product
3. Renewal Letter updated with billing/shipping addresses and new products
4. New Sales 24 months or greater have been annualized
5. New Exportable Annual Rep Report added “Expirations by Account (Full Year)
6. MDR PID has been added as a displayable field
7. Product Group Filter added to the Expirations Overview by Product Report

Advanced Search

1. Redesigned Advanced Search Page that allows Cross Searching Multiple fields.
2. Advanced Search now possible by school email domain
3. Advanced Search now includes Invoice Number search option

Trials

1. Trial Extension/Creation threshold set back to 90 days from previous access

Miscellaneous

1. New Decline Renewal Reason option added – “customer not responsive”