



Account Management System

WIZARDS

Quick Start Guide



Table of Contents

Each AMS Wizards is designed to guide you through the steps of a process or task by asking a series of questions or presenting options.

Wizards are available from the AMS Dashboard and also any Account screen.

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Create a New Account Wizard

Purpose: Use this Wizard to Create a New Account in the AMS

To get started, select the “+ Create A New Account” option from the AMS Dashboard. The “+ Create A New Account” wizard will then take you through the following steps to create the account:

Step 1 > Create Account Name

Step 1 > Create Account Name

This is the name of the Account that will be used system-wide in order to identify the account. This name does not have to be unique, it should however, accurately represent the company's, school's, institution's actual name. If you see a name in the similar accounts list you should verify that that is not the actual account for this institution. Do NOT add another account for the same institution.

Account Name *

Next Step

1. Enter the Name of the Institution that you are adding to the AMS.
 - The name does not have to be unique
 - The name should accurately represent the institution's actual name.
2. The “Search Assist” technology will present you with similar accounts already in the AMS. If you see an already existing account with a similar name to the one you are attempting to create, please verify that the accounts are not the same before proceeding.
3. If the accounts are the same, do not create a duplicate account. Exit the Wizard by clicking on the Home/Dashboard icon  at the top of the screen.
4. If you have confirmed that the Account does not already exist in the AMS, click on the “Next Step” button to proceed.

Step 2 > Create Username and Password

Step 2 > Create Username and Password

This is the Username and Password that this account will use to access their products. The Username must be unique throughout the system, and the Admin Username cannot be the same as the Username. The Admin Username is for an Admin User at this institution so that he/she can check their analytics, etc.

Username *

Password *

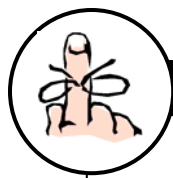
Admin Username *

Admin Password *

Previous Step

Next Step

1. Enter the Username that the customer will use to gain access to the products in the account.
 - The username must be unique; no two Accounts can have the same username.
 - The username must be at least 4 characters long.
2. Enter the Password that the customer will use to gain access to the products in the account.
 - The password must be at least 4 characters long.
3. Enter the Admin Username that the administrator of the account will use to gain access to the Usage Statistics, Icons, Search Widgets and other administrative features of the account.
 - The Admin username must be unique; no two Accounts can have the same Admin username.
 - The Admin username must be at least 4 characters long.
4. Enter the Admin Password that the administrator of the account will use to gain access to the Usage Statistics, Search Widgets, MARC Records and other administrative features of the account.
 - The Admin password must be at least 4 characters long.
5. Once you have entered in all required information, click on the “Next Step” button to proceed.



REMEMBER!

**All fields are required in this step.
You will not be able to move to the next step without completing all fields.**

Step 3 > Consortia

Step 3 > Consortia

A Consortium is a purchasing agent or service provider for other Accounts in this system. If this new Account is a purchasing agent or service provider for other Accounts in this system then this Account should be marked as a Master. If this new Account is a Member of one or several other Accounts already in this system, and those Accounts provide service or purchasing power to this new Account, then this Account should be marked as a Member. Otherwise, this Account can be marked as None at this time.

Is this Account part of a Consortium Account?

Not at This Time
Master
Member
Not at This Time

Previous Step Next Step

1. Indicate if this account is part of a Consortium Account by selecting the following options that applies to the account you are creating:
 - **Not At this Time** – Does not label the account as being part of a consortium.
 - **Master** – Labels the account as a Master Consortia Account.
 - **Member** – Labels the account as a Member of a Master account.
2. If “Member” is selected, you will be asked to input the Account Name of the associated “Master” Consortia Account.
 - Simply type in the name of the Master Account and select it from the Search Assist list.
3. If “Master” is selected, you will be asked to specify whether it is a “Bill Only” or a “Bill-And-Receive” Consortia Account. You will also be asked to locate the Consortia Members.
 - Simply type in the name of a Member Account to locate it from the Search Assist list.
 - You can add multiple Members on this screen.
 - You can also remove a Member on this screen if it is added in error.
4. Once you have entered in all required information, click on the “Next Step” button to proceed.

Step 4 > Account Details and Address

Step 4 > Account Details and Address

Please fill in the Account Details and the Address for this Account. The Address will be used as the Billing and Shipping Address. You will be able to add new / update this Address on the Account Details page after you have created this Account.

Organization Type *

FTE / Users *

Address 1 *

Address 2

Address 3

City *

Country *

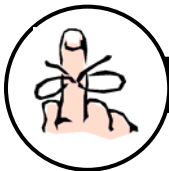
State *

Zip Code *

Province

[Previous Step](#) [Next Step](#)

1. Enter the account details and address information of the organization that is being added to the AMS.
 - **Organization Type** – Select the type of organization that applies to the account you are creating.
 - **FTE/Users** – Enter the total number of full time enrollment users that the organization has and who will potentially access the account.
 - **Address 1** – Enter the address of the organization.
 - **City** – Enter the city where the organization is located.
 - **Country** – Select the country where the organization is located.
 - **State** – Select the state where the organization is located.
 - **Zip Code** – Enter the zip code where the organization is located.
 - **Province** – Enter the province where the organization is located.
2. Once you have entered in all required information, click on the “Next Step” button to proceed.



REMEMBER!

**All fields are required in this step.
You will not be able to move to the next step without completing all fields.**

Step 5 > Contacts

Step 5 > **Contacts**

You must add at least one contact. If you would like to add more click the "Add Another Contact" button and fill in the contact's information. Once you are done, you can submit the entire form.

First Name *

Last Name *

Title *

Phone *

Email *

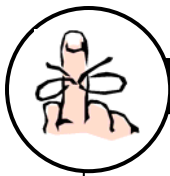
Product Line
All
Reference Database
Streaming Video
eLearning Module
eBook
Career Services

[+ Add Another New Contact](#)

1. Enter the contact information for the contact personnel of the account you are creating. All of the following fields are required except for the "*Product Line*" field:
 - **First Name** – Enter the contact personnel's first name.
 - **Last Name** – Enter the contact personnel's last name.
 - **Title** – Enter the contact personnel's title.
 - **Phone** – Enter the contact personnel's phone number.
 - **Email** – Enter the contact personnel's e-mail address.
 - **Product Line** – Select the product line that the contact personnel deals with. Unless it is specified by the contact personnel, leave this field on the defaulted "*All*" selection.
2. **"+ Add Another New Contact"** - Select this option, at the bottom of the page, if you would like to add another contact personnel to the account.



You can now have multiple contacts listed for a single account. Don't forget to use the "*Product Line*" designation to indicate which contact should be used for each type of product.



REMEMBER!

**All fields are required in this step.
You will not be able to move to the next step without completing all fields.**



Create a Price Quote

Purpose: Use this Wizard to Create a New Price Quote in the AMS

To get started, select the “+ Create A Price Quote” option from the AMS Dashboard.

Before you start, the Wizard will ask you to Find an Account to attach the Price Quote to. You can simply type in the Account Name or Web ID that you are looking for and the system will suggest Accounts for you to select from. If you do not see the Account listed, you can click on “Create One” to access the “+Create a New Account” Wizard.

Find An Account

Price Quote

Please type the **Name** or **ID** of the Account that you would like to **Price Quote** for.

Can't find the Account you're looking for? [Create one.](#)

Once you have selected an Account, the “+ Create A Price Quote” wizard will then take you through the following steps to create the price quote.

Step 1 > Select Products

Step 1 > Select Products

Products marked with a line-through (example) have been selected as part of a package. In order to add/remove those items you must deselect the related package in the "View By Package" section.

Start Date: End Date:

Reference Database
Streaming Video
eLearning Module

☐ Select All

☐ U.S. Government Online
☐ American History Online
☐ Modern World History Online
☐ American Women's History Online
☐ African-American History Online
☐ American Indian History Online
☐ Ancient and Medieval History Online
☐ Science Online
☐ World Geography and Culture Online
☐ Ferguson's Career Guidance Center
☐ Health Reference Center
☐ Bloom's Literary Reference Online
☐ Writer's Reference Center
☐ Curriculum Resource Center
☐ World News Digest
☐ Issues & Controversies
☐ Issues & Controversies in American History
☐ Today's Science
☐ The World Almanac for Kids Online
☐ The World Almanac Online
☐ World Religions Online

(View By Type)

Step 1 > Select Products

Products marked with a line-through (example) have been selected as part of a package. In order to add/remove those items you must deselect the related package in the "View By Package" section.

Start Date: End Date:

Careers & Education
Current Issues
General Reference
Geography & Culture
History
Literature & Language Arts
Medical & Health
News Services
Religion & Philosophy
Science & Mathematics

☐ Select All

☐ Ferguson's Career Guidance Center
☐ Top Careers with a Two-Year Degree Online
☐ Exploring Career Clusters Online

(View By Subject)

1. In this step, you are given the ability to select the product(s) that you will be quoting.
2. Select your View option.
 - Select the "View by Type" tab to view the available products by Product Type; or
 - Select the "View by Subject" tab to view the available products by Subject.
3. Select the checkbox next to the product(s) you are quoting.
4. Select the Start Date and End Date for the quote you are generating.
 - The Start Date and End Date are applied only to the individual product(s) you have selected and not to the account as a whole.
 - Products with a checkmark next to them have been selected as part of a package.



You can now view available Products by product type or subject. Products selected in one view will automatically be selected in the other view.

Step 2 > Edit Pricing Information

Step 2 > Edit Pricing Information

Edit pricing information, then create the price quote and prepare the message.

Product	Price
Modern World History Online	790.00

Discount (%)	0	Total	\$790.00
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Create & Preview Message

1. In this step, you are given the ability to edit the pricing information for the product(s) you are quoting.
2. Add any discount that you would like to give to the subscriber of the product(s) by clicking into the “*Discount*” section.
3. Make any other necessary changes and then click on “Create & Preview Message”.

Step 3 > Fill Out Message Details

Final Step > **Fill out Message Details**

Review the Message Details below and adjust as you see fit. Then Send this Message or Save it to be sent later.

Additional Addresses (Separate multiples with semicolon ";")

To:

CC:

Subject:

Infobase Learning PriceQuote – DeKalb County Public Library

DeKalb County Public Library

Thank you for your interest in a subscription to our online services. You will find suggested pricing and sales and technical information below. We appreciate your interest and encourage you to contact us with any further questions.

Product	Price
Modern World History Online	\$790.00 over 12 months
	Subtotal: 790.00
Percent Discount: 10	Subtotal after discount: 790.00

Contact Information

Technical Support

Streaming Video:
support@films.com, 1-800-322-8755 ext. 4236

Online Database & eLearning Module:
support@factsonfile.com, 1-800-322-8755 ext. 4230

Billing and Customer Service:
custserv@factsonfile.com, 1-800-322-8755 - option 1

Sincerely,

Domenic Durante
Digital Services Consultant
ddurante@infobaselearning.com
1-800-322-8755 x4305

You are receiving this email from Infobase Learning because you are one of our database or streaming video subscribers. To ensure the delivery of Infobase Learning emails to your inbox, please take a moment to add support@infobaselearning.com to your Email Address Book or Safe List.

Save & Close **Send**

1. In this step, you have the ability to review the message details for the product subscription(s) that will be reflected in the price quote and also adjust the message as you see fit.
2. You can then send the e-mail message or save it to be sent later. Click on “Send” to send the message; or click on “Save & Close” to save the message.



All Messages can now be saved and sent at a future time. The saved version will include any edits that you have made the message template. Saved messages are available in an Account's "Message History" tab.



Add a Subscription Wizard

Purpose: Use this Wizard to Add a New Subscription to an Account in the AMS

To get started, select the “+ Add a Subscription” option from the AMS Dashboard. The “+Add a Subscription” wizard will then take you through the following steps to create the account:

Before you start, the Wizard will ask you to Find an Account to attach the Subscription to. You can simply type in the Account Name or Web ID that you are looking for and the system will suggest Accounts for you to select from. If you do not see the Account listed, you can click on “Create One” to access the “+Create a New Account” Wizard.

The screenshot shows a web interface titled "Find An Account". Below the title is the heading "Add Subscription(s)". A text prompt reads: "Please type the **Name** or **ID** of the Account that you would like to **Add Subscription(s)** for:". Below this is a text input field with the placeholder text "Find an account...". At the bottom of the form, there is a link that says "Can't find the Account you're looking for? [Create one.](#)".

Once you have selected an Account, the “+ Add a Subscription” wizard will then take you through the following steps to add one or more subscriptions to an Account.

Step 1 > Select Packages

here.' There are three package options, each with a checkbox and a '(details +)' link: 'Science', 'History', and 'FOD Master Academic'. At the bottom, there are two buttons: 'Cancel' on the left and 'Next Step' on the right." data-bbox="136 81 839 351"/>

Step 1 > **Select Packages**

You may select from a list of packages below, or just skip to the next step [here](#).

☐ **Science**
(details +)

☐ **History**
(details +)

☐ **FOD Master Academic**
(details +)

[Cancel](#) [Next Step](#)

1. In this step, you have the option to select a pre-assembled group of products to add to a subscription. These are called “Packages”.
2. Select any group of packages that you would like to add to an account by the placing a check mark next to the corresponding package(s).
 - You can select the **(details +)** option to view the list of product subscription(s) that are part of any package.
3. If you do not want to select a package, you can select the **“here”** option listed at the top of the screen or just click on “Next Step” and you will be taken to next step in this wizard.



Packages are a new concept that will be made available based on Sales or Marketing requests. A package can consist of any combination of online products across subjects and/or product types.

Step 1(A) > Select Products

Step 1A > Select Products

Products marked with a line-through (~~example~~) have been selected as part of a package. In order to add/remove those items you must deselect the related package in the "View By Package" section.

Start Date End Date

Reference Database

Streaming Video

eLearning Module

- ☐ Select All
- ☐ U.S. Government Online
- ☐ American History Online
- ☐ Modern World History Online
- ☐ American Women's History Online
- ☐ African-American History Online
- ☐ American Indian History Online
- ☐ Ancient and Medieval History Online
- ☐ World Geography and Culture Online
- ☐ Ferguson's Career Guidance Center
- ☐ Health Reference Center
- ☐ Bloom's Literary Reference Online
- ☐ Writer's Reference Center
- ☐ Curriculum Resource Center
- ☐ World News Digest
- ☐ Issues & Controversies
- ☐ Issues & Controversies in American History
- ☐ Today's Science
- ☐ The World Almanac for Kids Online
- ☐ The World Almanac Online
- ☐ World Religions Online

1. In this step, you have the ability to select the product subscription(s) that you will be adding to the account.
2. Select the checkbox next to the product subscription(s) you are adding to the account.
 - Products with a check mark next to them have been selected as part of a package in the previous step.
3. Select the Start Date and End Date for the product subscription(s) you are adding to the account.
 - The Start Date and End Date are applied only to the individual product(s) you have selected and not to the account as a whole.
4. Once you have selected the products you want to add, click on the "Next Step" button.



The list of products available to be subscribed to is dynamic. Only those products not part of the Account's subscription or an active trial will display in the lists of available products.

Step 2 > Edit Pricing Information

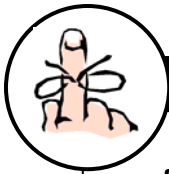
Step 2 > Edit Pricing Information

Edit pricing information for the selected Products.

Product	Start	End	Term	Base Price	Discount	Price
Science Online	10/28/2011	11/1/2012	12	\$1,442.00		1442.00
						Total \$ 1442.00

[Return to Product Selection](#)[Add Billing Details](#)

1. In this step, you have the ability to edit the pricing information for the product subscription(s) you are adding to the account.
2. Select the term length for the product subscription(s) you are adding to the account.
3. Add any discount that you would like to give to the subscriber of the product(s) by placing clicking into the “*Discount*” column.
4. When you are done, click on “Add Billing Details”.



REMEMBER!

In most Wizards, you can return to the previous step without losing any of the information you already entered. In this case, just click on “Return to Product Selection” to go back to the previous step.

Step 3 > Add Order Details

Step 3 > Add Order Details

Select the Account that is ordering these products, and select the Accounts that will receive these new products.

Bill Date: 10/28/2011

Account Details

This is a basic account

Notes:

Return to Product Details

Review

1. In this section, you have the ability to add details to the subscription order you are creating.
2. Specify the billing date for the order you are creating by placing your cursor in the input box where a date is listed and selecting a date from the calendar that will appear.
3. Add any notes that you would like associated with the order.
4. If the account is Not part of a Consortium then you will see the caption of *"This is a basic account"*.
5. If the account is a part of a Consortium then you will see the caption of *"This is a member of a consortium"*. You can then select from list of the related accounts that will also receive the product subscription(s) you are adding or you can add the product subscription(s) only to the current account.
6. When you are done, click on "Review" to review the subscription order.

Step 4 > Review The Order

Final Step > **Review the Order**

Review the details and Create the Order.

Products

Product	Start	Expire	Final Price
Science Online	10/28/2011	11/1/2012	\$1442.00
			\$1442.00

Billing Account

Springville Public Library

Bill Date

October 28, 2011

Recipients

Springville Public Library

Notes

[Return to Billing Details](#)[Create](#)

1. In this step, you have the ability to review the details of the product subscription(s) order you are creating and also complete the order.
2. If you need to back any changes, click on “Return to Billing Details”.
3. If you are satisfied with the information, click on “Create” to submit the Subscription order.



Add a Trial Wizard

Purpose: Use this Wizard to Add a New Trial to an Account in the AMS

To get started, select the “+ Add a Trial” option from the AMS Dashboard. The “+Add a Trial” wizard will then take you through the following steps to create the account:

Before you start, the Wizard will ask you to Find an Account to attach the Trial to. You can simply type in the Account Name or Web ID that you are looking for and the system will suggest Accounts for you to select from. If you do not see the Account listed, you can click on “Create One” to access the “+Create a New Account” Wizard.

The screenshot shows a web interface titled "Find An Account". Below the title is the heading "Add Trial(s)". A text prompt reads: "Please type the **Name** or **ID** of the Account that you would like to **Add Trial(s)** for." Below this is a text input field with the placeholder text "Find an account...". At the bottom of the form, there is a link that says "Can't find the Account you're looking for? [Create one.](#)".

Once you have selected an Account, the “+ Add a Trial” wizard will then take you through the following steps to add one or more trials to an Account.

Step 1 > Select Products

Step 1 > Select Products

Products marked with a line-through (~~example~~) have been selected as part of a package. In order to add/remove those items you must deselect the related package in the "View By Package" section.

Start Date End Date

View By Type **View By Subject**

Reference Database
Streaming Video
eLearning Module

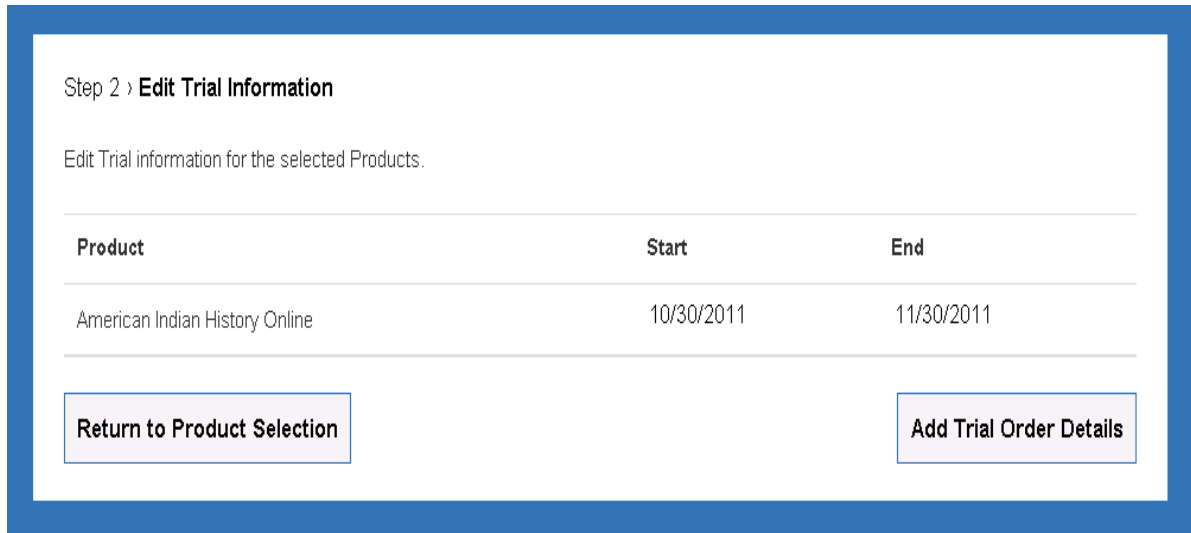
☐ Select All
☐ U.S. Government Online
☐ American History Online
☐ Modern World History Online
☐ American Women's History Online
☐ African-American History Online
☐ American Indian History Online
☐ Ancient and Medieval History Online
☐ Science Online
☐ World Geography and Culture Online
☐ Ferguson's Career Guidance Center
☐ Health Reference Center
☐ Bloom's Literary Reference Online
☐ Writer's Reference Center
☐ Curriculum Resource Center
☐ World News Digest
☐ Issues & Controversies
☐ Issues & Controversies in American History
☐ Today's Science
☐ The World Almanac for Kids Online
☐ The World Almanac Online
☐ World Religions Online

1. In this step, you have the ability to select the product trials(s) that you will be adding to the account.
2. Select the checkbox next to the product trials(s) you are adding to the account.
3. Select the Start Date and End Date for the product trials(s) you are adding to the account.
 - The Start Date and End Date are applied only to the individual product(s) you have selected and not to the account as a whole.
4. Once you have selected the products you want to add, click on the "Next Step" button.



The list of products available to be trialed is dynamic. Only those products not part of the Account's subscription or an active trial will display in the lists of available products.

Step 2 > Edit Trial Information



Step 2 > **Edit Trial Information**

Edit Trial information for the selected Products.

Product	Start	End
American Indian History Online	10/30/2011	11/30/2011

[Return to Product Selection](#) [Add Trial Order Details](#)

1. In this step, you have the ability to edit the trial information for the product(s) that will be part of the trial.
2. Verify the selected Start Date and End Date for the product(s) that will be part of the trial.
3. When you are done, click on “Add Trial Order Details”.

Step 3 > Add Order Details

Step 3 > Add Order Details

Select the Account that is ordering these products, and select the Accounts that will receive these new products.

Bill Date: 10/28/2011

Account Details

This is a basic account

Notes:

Return to Product Details

Review

1. In this step, you have the ability to add details to the trial you are creating.
2. Add any notes that you would like associated with the order.
3. If the account is Not part of a Consortium then you will see the caption of “*This is a basic account*”.
4. If the account is a part of a Consortium then you will see the caption of “*This is a member of a consortium*”. You can then select from list of the related accounts that will also receive the product subscription(s) you are adding or you can add the product subscription(s) only to the current account.
5. When you are done, click on “Review” to review the trial order.

Step 4 > Review The Order

Final Step > **Review the Order**

Review the details and Create the Order.

Products

Product	Start	Expire	Final Price
American Indian History Online	10/30/2011	11/30/2011	\$0
			\$0

Billing Account

George W Floyd Elem School

Bill Date

October 30, 2011

Recipients

George W Floyd Elem School

Notes

Return to Billing Details

Create

1. In this step, you have the ability to review the details of the product trial(s) you are creating and also complete the trial setup.
2. If you need to back any changes, click on “Return to Billing Details”.
3. If you are satisfied with the information, click on “Create” to submit the Trial.

Step 5 > Fill Out Message Details

Final Step > Fill out Message Details

Review the Message Details below and adjust as you see fit. Then Send this Message or Save it to be sent later.

Contact List

☐ Dr Elby B Lyons
(dasbury@itchfield.gcs.k12.al.us)

Additional Addresses (Separate multiples with semicolon ";")

To:

CC:

Subject:

Infobase Learning Trial – George W Floyd Elem School

Product Information to include:

☒ American Indian History Online

[Update Product Information](#)

Trial Information

No Products Selected

Includes Unlimited Usage; Onsite and Remote Access

We ask that you do not post usernames and passwords on publicly viewable websites.

Administration Access

Streaming Video:
<http://admin.films.com>

Online Database & eLearning Module:
<http://admin.infobasepublishing.com>

Our Admin Portals provide access to your usage statistics and other advanced features.

Contact Information

Technical Support

Streaming Video:
support@films.com, 1-800-322-8755 ext. 4236

Online Database & eLearning Module:
support@factsonfile.com, 1-800-322-8755 ext. 4230

Billing and Customer Service:
custserv@factsonfile.com, 1-800-322-8755 - option 1

Sincerely,

Domenic Duanle
Digital Services Consultant
dduanle@infobaselearning.com
1-800-322-8755 x4305

You are receiving this email from Infobase Learning because you are one of our database or streaming video subscribers. To ensure the delivery of Infobase Learning emails to your inbox, please take a moment to add support@infobaselearning.com to your Email Address Book or Safe List.

[Save & Close](#) [Send](#)

1. In this step, you have the ability to review the message details for the product trial(s) that will be reflected in the message as you see fit.
2. You can then send the e-mail message or save it to be sent later. Click on “Send” to send the message; or click on “Save & Close” to save the message.



All Messages can now be saved and sent at a future time. The saved version will include any edits that you have made the message template. Saved messages are available in an Account's “Message History” tab.



Renew a Subscription Wizard

Purpose: Use this Wizard to Renew an Existing Subscription in the AMS

To get started, select the “+ Renew a Subscription” option from the AMS Dashboard. The “+Renew a Subscription” wizard will then take you through the following steps to create the account:

Before you start, the Wizard will ask you to Find an Account to attach the Trial to. You can simply type in the Account Name or Web ID that you are looking for and the system will suggest Accounts for you to select from. If you do not see the Account listed, you can click on “Create One” to access the “+Renew a Subscription” Wizard.

The screenshot shows a web interface for the 'Find An Account' wizard. At the top, it says 'Find An Account' and 'Renew Subscription(s)'. Below this, there is a prompt: 'Please type the Name or ID of the Account that you would like to Renew Subscription(s) for'. Underneath the prompt is a text input field. At the bottom of the form, there is a link that says 'Can't find the Account you're looking for? [Create one.](#)'.

Once you have selected an Account, the “+ Add a Trial” wizard will then take you through the following steps to add one or more trials to an Account.

Step 1 > Select Products

Step 1 > Select Products

Products marked with a line-through (~~example~~) have been selected as part of a package. In order to add/remove those items you must deselect the related package in the "View By Package" section.

Start Date End Date

View By Type **View By Subject**

Reference Database
Streaming Video
eLearning Module

☐ Select All
☐ U.S. Government Online
☐ American History Online
☐ Modern World History Online
☐ American Women's History Online
☐ African-American History Online
☐ American Indian History Online
☐ Ancient and Medieval History Online
☐ Science Online
☐ World Geography and Culture Online
☐ Ferguson's Career Guidance Center
☐ Health Reference Center
☐ Bloom's Literary Reference Online
☐ Writer's Reference Center
☐ Curriculum Resource Center
☐ World News Digest
☐ Issues & Controversies
☐ Issues & Controversies in American History
☐ Today's Science
☐ The World Almanac for Kids Online
☐ The World Almanac Online
☐ World Religions Online

1. In this step, you have the ability to select the product subscription(s) that you want to renew for the chosen account.
2. Select the checkbox next to the product subscription(s) you are renewing.
3. Select the new Start Date and End Date for the product subscription(s) you are renewing.
 - The Start Date and End Date are applied only to the individual product(s) you have selected and not to the account as a whole.
4. Once you have selected the products you want to add, click on the "Next Step" button.



The list of products available to be renewed is dynamic. Only those products already part of the Account's active or recently expired subscription list will display in the lists of available products.

Step 2 > Edit Pricing Information

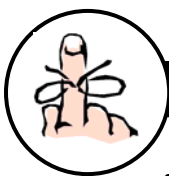
Step 2 > Edit Pricing Information

Edit pricing information, specific start and expiration dates, as well as the term for the selected Products.

Product	Start	End	Term		Base Price	Renewal Rate	Discount	Price
Science Online	5/31/2012	5/31/2013	12	▼	\$1442.00			1442.00
								Total \$ 1442.00

[Return to Product Selection](#)[Add Billing Details](#)

1. In this step, you have the ability to edit the pricing information for the product subscription(s) you are renewing for the selected account.
2. Select the term length for the product subscription(s) you are renewing.
3. Add the renewal rate for the product subscription(s) that you are renewing by placing your cursor underneath the “*Renewal Rate*” column.
4. Add any discount that you would like to give to the subscriber of the product(s) by placing clicking into the “*Discount*” column.
5. When you are done, click on “Add Billing Details”.



REMEMBER!

In most Wizards, you can return to the previous step without losing any of the information you already entered. In this case, just click on “Return to Product Selection” to go back to the previous step.

Step 3 > Add Order Details

Step 3 > Add Order Details

Select the Account that is ordering these products, and select the Accounts that will receive these new products.

Bill Date: 10/31/2011

Promo Code:

Account Details
This is a basic account

Notes:

[Return to Product Details](#) [Review](#)

1. In this step, you have the ability to add details to the product subscription(s) you are renewing.
2. You can specify the billing date for the product subscription(s) you are renewing by placing your cursor in the input box where a date is listed and selecting a date from the calendar that will appear.
3. Add any notes that you would like associated with the order.
4. If the account is Not part of a Consortium then you will see the caption of “*This is a basic account*”.
5. If the account is a part of a Consortium then you will see the caption of “*This is a member of a consortium*”. You can then select from list of the related accounts that will also receive the product subscriptions(s) you are renewing or you can add the product renewals(s) only to the current account.
6. When you are done, click on “Review” to review the renewal order.

Step 4 > Review The Order

Final Step > **Review the Order**

Review the details and Create the Order.

Products

Product	Start	Expire	Final Price
Science Online	5/31/2012	5/31/2013	\$1442.00
			\$1442.00

Billing Account

Loudoun County Public Library

Bill Date

October 31, 2011

Recipients

Loudoun County Public Library

Notes

[Return to Billing Details](#)[Create](#)

1. In this step, you have the ability to review the details of the product subscription(s) renewal you are creating and also complete the renewal.
2. If you need to back any changes, click on “Return to Billing Details”.
3. If you are satisfied with the information, click on “Create” to submit the Renewal order.



Create Renewal Quote Wizard

Purpose: Use this Wizard to Create a Renewal Quote in the AMS

To get started, select the “+ Create A Renewal Quote” option from any Account screen in the AMS. The “+ Create A Renewal Quote” wizard will then take you through the following steps to create the renewal quote:

Step 1 > Select Products

The screenshot shows the 'Step 1 > Select Products' wizard. At the top, it says 'Step 1 > Select Products'. Below that, a note states: 'Products marked with a line-through (example) have been selected as part of a package. In order to add/remove those items you must deselect the related package in the "View By Package" section.' There are two date input fields: 'Start Date' with the value '10/28/2011' and 'End Date' with the value '10/28/2012'. Below the dates are two buttons: 'View By Type' and 'View By Subject'. The 'View By Subject' button is highlighted. On the left, there are three categories: 'Reference Database', 'Streaming Video', and 'eLearning Module'. The 'Reference Database' category is selected, and a list of products is displayed on the right. Each product has a checkbox next to it. The products listed are: 'Select All', 'U.S. Government Online', 'American History Online', 'Modern World History Online', 'American Women's History Online', 'African-American History Online', 'American Indian History Online', 'Ancient and Medieval History Online', 'Science Online', 'World Geography and Culture Online', 'Ferguson's Career Guidance Center', 'Health Reference Center', 'Bloom's Literary Reference Online', 'Writer's Reference Center', 'Curriculum Resource Center', 'World News Digest', 'Issues & Controversies', 'Issues & Controversies in American History', 'Today's Science', 'The World Almanac for Kids Online', 'The World Almanac Online', and 'World Religions Online'. At the bottom, there are two buttons: 'Cancel' and 'Next Step'.

1. In this step, you have the ability to select the product subscription(s) that will be included in the renewal quote.
2. Select the checkbox next to the product subscription(s) that will be part of the renewal quote.
3. Select the new Start Date and End Date for the product subscription(s) that will be part of the renewal quote.
 - The Start Date and End Date are applied only to the individual product(s) you have selected and not to the account as a whole.
4. Once you have selected the products you want to add, click on the “Next Step” button.

Step 2 > Edit Pricing Information

Step 2 > **Edit Pricing Information**

Edit pricing information, then create the price quote and prepare the message.

Product	Renewal Rate (%)	Price
Ferguson's Career Guidance Center	2	790.50
Discount (%)	0	Total \$790.50

Create & Preview Message

1. In this step, you have the ability to edit the pricing information for the product subscription(s) that will be reflected in the renewal quote.
2. Add the renewal rate for the product subscription(s) that will be part of the renewal by placing your cursor underneath the “*Renewal Rate*” column.
3. Add any discount that you would like to give to the subscriber of the product(s) by placing clicking into the “*Discount*” column.
4. When you are done, click on “Create & Preview Message”.

Step 3 > Fill Out Message Details

Final Step > Fill out Message Details

Review the Message Details below and adjust as you see fit. Then Send this Message or Save it to be sent later.

Contact List

☐ Henry Stewart
(hstewart@troy.edu)

Additional Addresses (Separate multiples with semicolon ";")

To:

CC:

Subject:

Infobase Learning RenewalQuote – Troy Univer

Troy University

Thank you for your interest in renewing a subscription to our online services. You will find suggested pricing and sales and technical information below. We appreciate your interest and encourage you to contact us with any further questions.

Product	Price
Ferguson's Career Guidance Center	\$790.50 over 12 months
Subtotal: 790.50	

Contact Information

Technical Support

Streaming Video:
support@films.com, 1-800-322-8755 ext. 4236

Online Database & eLearning Module:
support@factsonline.com, 1-800-322-8755 ext. 4230

Billing and Customer Service:
custserv@factsonline.com, 1-800-322-8755 - option 1

Sincerely,

Danielle Marchese
Digital Services Consultant
dmarchese@infobaselearning.com
1-212-896-4222

You are receiving this email from Infobase Learning because you are one of our database or streaming video subscribers. To ensure the delivery of Infobase Learning emails to your inbox, please take a moment to add support@infobaselearning.com to your Email Address Book or Safe List.

Save & Close **Send**

1. In this step, you have the ability to review the message details for the renewal quote that will be reflected in the message as you see fit.
2. You can then send the e-mail message or save it to be sent later. Click on "Send" to send the message; or click on "Save & Close" to save the message.



All Messages can now be saved and sent at a future time. The saved version will include any edits that you have made the message template. Saved messages are available in an Account's "Message History" tab.