Infobase Learning

Account Management System

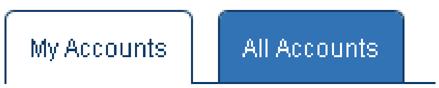
Account Overview

The new Account Management System has updated how Account information is stored, displayed and edited. This Quick Start Guide provides important information about finding, viewing, and modifying an existing account.

Finding an Account

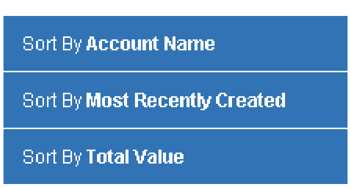
You can locate an account by clicking on the “Accounts” icon in the top navitation bar or by using the search function.

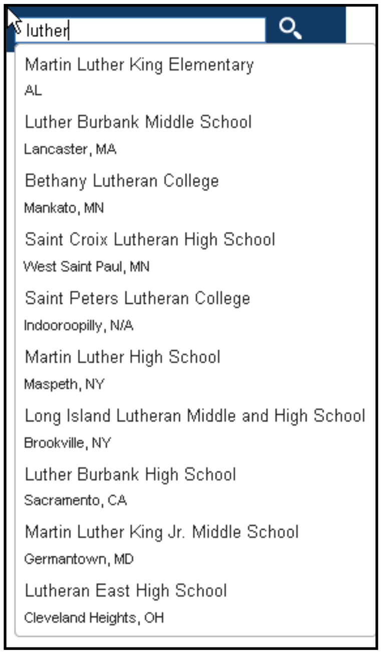
Selecting the “Accounts” icon will display a list accounts in two separate tabs. The default tab view (“My Accounts”) will contain a list of all accounts associated with your username. The other tab view (“All Accounts”) will contain a list of all accounts in the system.



Whether looking at “My Accounts” or “All Accounts” you can filter the list to show only the following types of accounts: All Accounts, Only those with Active Trials, Only those with Active Subscriptions, Only those with Expired Trials, or Only Those with Expired Subscriptions. The filtering options are available at the top of the screen in the “Show” drop-down menu.

You can also sort both “My Accounts” and “All Accounts” using the sorting options on the right of the screen. Clicking on any sort option will rearrange the order that the current list displays.



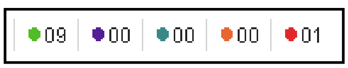


If you use the search box to locate an account, start typing the name of the account and the system will display suggested accounts using a search assist technology. This includes account names and city/state information. If one of the accounts displayed is what you are looking for, click it to access that's account information.

If not, click on the magnifying glass icon to over-ride the Search Assist and perform a full account search. The search results will display with the same options noted above – you will be able to filter and/or sort the results to find what you are looking for.

Once you locate an account, you will have instant access to some key information about the account right from the search or browse listing. This information includes the Territory, Date Created, Market, Total Value, and a summary of Subscriptions and Trials.

The Subscriptions/Trials summary information is presented visually with a different color used to represent each type of access the account has. The key to this data is provided in the top right of the screen. And each account's summary data is displayed next to the Account Name:



To access more detailed account information, you can click on any Account Name. This will take you the new Account Details Page, organized into the following tabs to make it easier to find and edit the information you need:

Account Details
In this tab you will find all basic, contact, address, and consortium information available for the selected account. You may edit any fields by clicking the "pencil" icon on the right side of the screen.

KEY CHANGE

You can now have multiple contacts and multiple addresses listed for a single account. For Contacts, use the "Product Line" designation to indicate which contact should be used for each type of product. For Addresses, use the Billing/Shipping options to designate each address as one or the other.

Subscriptions
In this tab you will see all the products this account currently has access to. You are able to sort by all of the subscription/trial types: active, expired, and deferred using the options at the top of the screen. From this tab you can also view the subscription history, extend access or decline renewal.

Message History
From this tab you can view any email message sent previously, resend any message related to this account, or use the message templates.

Authentication
Here you can manage the Usernames and Passwords the customer uses to access their subscriptions and trials. You may also submit requests to the Support Team for adding additional authentication options like IP recognition.

KEY CHANGE

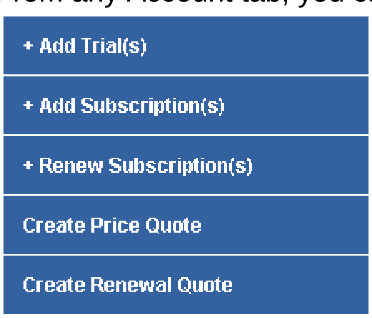
For new Accounts, a single Username and Password will work across all product types. All new Usernames must be at least 4 characters.

For existing Accounts, On Demand products will continue to have separate Usernames and Passwords.

Order History
In this tab you can view any orders placed for this account. Click the "arrow" next to any date to view the product and pricing details for an order. You can also submit a Credit from this page.

Notes
From here you can view and add individually time-stamped notes relevant to the account.

Additional Options
From any Account tab, you can access the available Wizards on the right of the screen:



Additional Help
If you experience problems or have questions with any of the Account options, you can click on the "Contact Support" link to send a pre-populated email to the Support team.