

Infobase Learning

Account Management System

“Attach a File” Feature Added

This week added in the AMS is the ability to attach a file of your choosing to an Order or Account. This may include any contract PDF or Word document, as long as the size is less than 20 MB.

Account Notes Tab

In addition to adding a text-based note, you can now also attach a document on the Account Notes tab. Simply click the “Paper Clip” icon, and browse for the file you would like to add.

Account Details

Subscriptions

Message History

Authentication

Order History

Notes

Add a note to this account

Attach Contact (optional) 

Add Note

Attach a file to this account



AMS - Pre Order Checklist... (88KB) - Complete

Please refresh the page to view your attached file.

Scott Wojtowicz

6/19/2013 12:19:00 PM

107995-Notes-2013 Holiday Schedule.doc



Please Note: In order to see your recently added file, please refresh the web browser page.

Order Wizards

During the Add Subscription and Renew Subscription Wizards you can now attach a document to be stored alongside the corresponding order.

Step 4 > Orders - Create New Subscription - Provide Billing Details

Please fill in any of the following that apply.

Decision to Purchase Made By The X Files

Bill Date 6/19/2013

Promo Code

Purchase Order #

Independent Sales Rep Choose

Access Notes

Billing Notes

Attach a File: 

[Back](#) [Save and Continue to Product Selection](#)

On Step 4, click the “Paper Clip” icon to add a file, and when the order is complete, you will be able to view it at any time from the Order History tab or Subscriptions tab.

[Account Details](#) [Subscriptions](#) [Message History](#) [Authentication](#) [Order History](#) [Notes](#)

Recipient: [OCLC-Capcon](#) [View](#) | [Print](#) | [Edit](#)

Date	Status	Price	Order Type
▶ 6/19/2013	Awaiting Access and Billing	\$0.00	New

Recipient: [OCLC-Capcon](#) [View](#) | [Print](#) | [Edit](#) 

Date	Status	Price	Order Type
▼ 6/19/2013	Awaiting Access and Billing	\$0.00	New

Product	Bill Date	Access Start	Access End	Price	Adjustments	Final
Ferguson's Career Guidance Center	6/19/2013	6/19/2013	6/30/2014	\$0.00	\$0.00	\$0.00
Health Reference Center	6/19/2013	6/19/2013	6/30/2014	\$0.00	\$0.00	\$0.00
Curriculum Resource Center	6/19/2013	6/19/2013	6/30/2014	\$0.00	\$0.00	\$0.00

If you have any questions or concerns about the Attach a File functionality please contact AMS Support at account.support@infobaselearning.com.