



Infobase Learning

2014 AMS Summary

The following list summarizes the key changes that were made to the Account Management System (AMS) during 2014. Additional bug fixes and minor enhancements are not included in this list. Items in [blue](#) were completed after November 1, 2014.

General Features/Enhancements

1. New Mass Email Wizard (Restricted to Managers)
2. Learn360 Access Control via AMS
3. Hot List "Favorites"
4. New Products Page added to display Summary/Usage stats about all products
5. New AMS Weekly email update available for managers

Account/Order Data

1. 3,501 Academic Accounts imported from MDR
2. 15,185 Public Library Accounts imported from MDR
3. Mapping Learn360 Location IDs to AMS Accounts
4. Learn360 Multi-Year Order Cleanup
5. Vault Campus Multi-Year Order Cleanup
6. Duplicate Account Data Cleaned Up

Products/Pricing

1. World News Digest – K-12/PL Pricing update
2. eLearning Library is now available as a new comprehensive product
3. FOD Australia Collection
4. AVOD Australia Collection
5. CVOD Australia Collection
6. AVOD International Collection
7. New World Cinema Collection
8. FOD Closed Captioning Collection discontinued
9. Learn360 "Content Only" version
10. Literary Classics eBooks Collection
11. [FOD-AVOD Combo Collection \(NC Live\)](#)

Accounts

1. School Logo Upload Option
2. Yearly Billing History chart
3. Consortia "children" list now display # of active subscriptions for each member
4. Contact Email Notifications, Job Titles, and Roles
5. Authentication Tab - Special Features (SSO, Local Hosting, LMS, and LTI options)
6. Authentication Tab – eBook Authentication controlled by AMS
7. New K-12 Accounts can only be setup by Managers
8. [Standard users can no longer create Public Library Accounts in the AMS](#)
9. [Added eBook Usage Stats link to AMS Accounts](#)
10. [1,500 School logos have been uploaded for the impending HRC launch](#)
11. [New MDR Population Served field is now displayed](#)
12. [Send Mass Email?" Suppression field has been added](#)
13. [New Proxy URL Modifier option added for HRC](#)

Messaging

1. Automated Renewal Reminder Emails now based on orders not subscriptions
2. New Vault Header Logo option in all message templates
3. New blank Infobase Learning email template
4. [Add Update Emails to AMS Message History - On Demand Monthly New Titles](#)
5. [Add Update Emails to AMS Message History - On Demand MARC Record Emails](#)
6. [New Font/Text Size Selections have been added to the Message Editor](#)

Reports

1. Removed annualization of dollars for all new sales across all reports
2. Expirations Overview report: Product Group filter added
3. Dashboard Expire Tab - changed to run on orders instead of subscriptions
4. New Report: Declined Renewal / Reason
5. New Report: Full year by Product Group
6. Order Report Wizard - Invoice Year filter added
7. Expire by Accounts Report - Billing Account added
8. Order Report Wizard - Order Date and Invoice Date displayable fields added
9. Account Report Wizard - Special Feature added
10. Primary Contact Phone Number displayable field added to all Report Wizards
11. National Account flag has been added to the Reporting Wizards
12. The Reporting Wizard broken into three separate wizards: Subscription, Order, and Account
13. Invoice Report - Payment Date, Invoiced Amount, and Balance Due fields now available
14. Independent Rep Report
15. ["All Selected Products Only" on Subscription Report Wizard](#)
16. [Product Exclusion Filters added to Report Wizard](#)
17. [Billing/Decision/Recipient filter added to the Order and Mass Email Wizard](#)
18. [Decision Maker Display field added to the Subscription Wizard](#)

Admin/Manager Tools

1. Edit Rep Territory Assignments
2. Edit Sales Reps on Accounts
3. Edit Order End Date
4. Change Order Type (New/Renewal)
5. Change Order Decision Maker
6. [Adding/Removing Independent Reps on an existing AMS Orders](#)
7. [New Unprint an order Function added](#)
8. [New Update Bill Date Function added](#)
9. [New Update Independent Rep Function added](#)
10. [New Include Recipients on Renewal Reminder Email Function added](#)

Trials

1. 90 Day time limitation has been removed for new trials

Sales Dashboard

1. All Dashboard Tabs Exportable to Excel
2. Expiring Subscriptions tab no longer displays subscriptions that have been already renewed
3. Expiring Subscriptions tab links now go directly to the Subscriptions page of an account
4. Sales Manager Dashboard - YTD Totals have been added to the Yearly progress tab
5. Dashboard Win Back Tab - Moves accounts to Prospect tab after three years
6. New Prospecting tab displays a list of accounts that have no active trials or subscriptions

Orders

1. New Extend/Renew Order Features
2. Order Wizards - add a "Bill as a Bundle" checkbox option
3. Moving the Support Order Queue from 15 days out to 30
4. Global Discount allowed increased from 10% to 30%
5. Order Specific Notes can be added

Price Quotes

1. Resubmit Price Quote button added to the details page in the Message History
2. Added a Low/Medium/High ranking option for Price Quotes
3. Added an Estimated Date for Price Quotes