

Infobase Learning

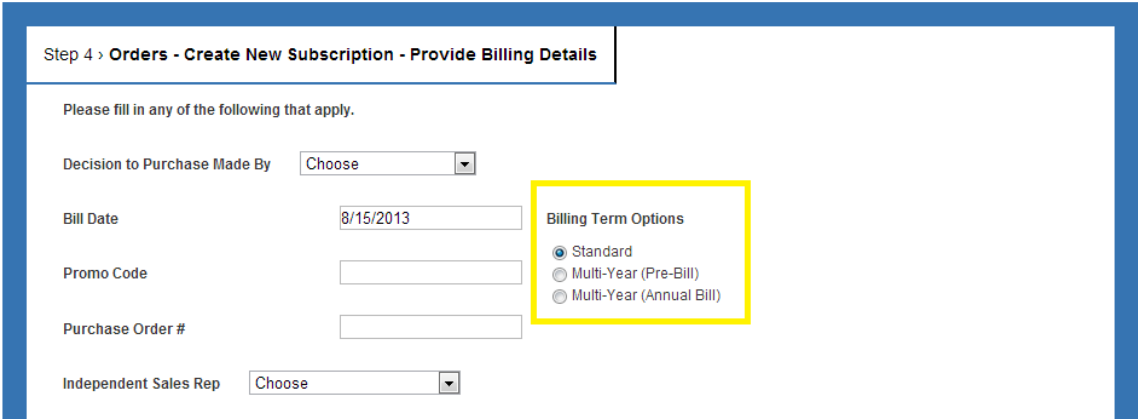
Account Management System

Multi-Year Order Feature Added

Added this week in the AMS was the ability to place a Multi-Year Order using either the New or Renewal Order Wizards.

New Billing Term Options

On Step 4 (*Provide Billing Details*) of the order wizards, you are now able to select from the following new billing term options:



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

Please fill in any of the following that apply.

Decision to Purchase Made By

Bill Date

Promo Code

Purchase Order #

Independent Sales Rep

Billing Term Options

- ☒ Standard
- ☐ Multi-Year (Pre-Bill)
- ☐ Multi-Year (Annual Bill)

- Standard
 - o This is the default selection, designed for any Order with a billing term between 1-23 Months.
- Multi-Year (Pre-Bill)
 - o Here you will be able to place an Order with billing terms of two or more years, where the customer is to be invoiced upfront for the entire length.
- Multi-Year (Annual Bill)
 - o The Annual Bill Option allows you to place an Order with a two or more year term, but the customer is billed each year separately.

Product Pricing per Year

On Step 6 (*Add Product Access Details*), you can select your billing terms in yearly increments: 24, 36, 48, 60, 72 Months.

Step 6 > Orders - Create New Subscription - Add Product Access Details

Add Access Dates and Billing Terms Multi-Year(Annual Bill)

Change Access Start for all Products:

Change Billing Terms for all Products:

Change Free Months for all Products:

On Step 7 (*Add Product Pricing Details*), you can price out each product individually per year.

Step 7 > Orders - Create New Subscription - Add Product Pricing Details

Add Pricing Multi-Year(Annual Bill)

Product	MSRP	Suggested Price	Billing Terms	Discount %	Final Price
African-American History Online (Year: 1)	0.00	0.00	12	0	0.00
African-American History Online (Year: 2)	0.00	0.00	12	0	0.00

Order History

- Pre-Bill will display as one order for the entire billing term.
- Annual Bill will display one order for each year of the billing term.

Multi Year University

Account DetailsSubscriptionsMessage HistoryAuthenticationOrder HistoryNotes

Date	Status	Price	Order			
Recipient: Multi Year UniversityView Print Edit						
8/15/2013	Awaiting Access and Billing	\$0.00	New Multi-Year (Annual Bill)			
Product	Bill Date	Access Start	Access End	Price	Adjustments	Final
African-American History Online	8/15/2013	8/15/2013	8/31/2014	\$0.00	\$0.00	\$0.00
Modern World History Online	8/15/2013	8/15/2013	8/31/2014	\$0.00	\$0.00	\$0.00
World News Digest	8/15/2013	8/15/2013	8/31/2014	\$0.00	\$0.00	\$0.00

Recipient: Multi Year UniversityView | Print | Edit

8/15/2013	Awaiting Access and Billing	\$0.00	Renewal Multi-Year (Annual Bill)
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Recipient: Multi Year UniversityView | Print | Edit

8/13/2013	Awaiting Access and Billing	\$36,000.00	New Multi-Year (Pre-Bill)
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If you have any questions or concerns about the Multi-Year Wizard functionality please contact AMS Support at account.support@infobaselearning.com.