R17 User Documentation

From CCB Local Wiki

Contents

Summary of Changes

- Subscriptions are created by selecting a product in the 'New Subscription' drop-down (no more order forms).
- Subscriptions now hold any number of products and addons. (Addons require that at least one product be on the subscription.)
- Products are displayed in bold text, and addons are displayed in normal text.
- Products and addons appear on the same lists and are no longer treated differently, other than the rule above.
- Various date rules are enforced, for instance:
    - Expiration dates are restricted to stay within 30 days of the original expiration date.
    - Products can have separate active/expiration dates from the subscription they are attached to, but must fit within the subscription
- Ask The Expert credits can be attached to a group, and become usable once they are assigned to a user. (A group administrator or CRM user can assign credits)

Pages

Customer Dashboard
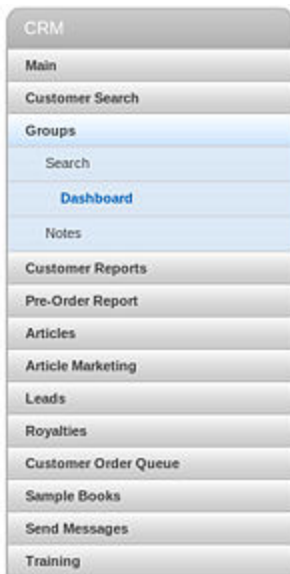
1. Products are listed in bold, and addons are listed in normal text
2. Demo/standard column indicates subscription type
3. Actions column links to any editing tasks for the subscription
4. Expired subscriptions are hidden by default, but can be shown with this link
5. The standard credits box - credits can now be shared among group members (see Credit Assignment Page)

Group Dashboard

1. Create a new subscription by clicking on this link.
2. Products are listed in bold, and addons are listed in normal text
3. Order Type column shows how this product was added to the subscription.
4. Actions column links to any editing tasks for the subscription
5. Expired subscriptions are hidden by default, but can be shown with this link
6. Group credits box - click on this to get to the Credit Assignment Page. Credits can now be shared among group members (see Credit Assignment Page).

Subscription Edit Page

CRM

Main
Customer Search
Groups
Customer Reports
Pre-Order Report
Articles
Article Marketing
Leads
Royalties
Customer Order Queue
Sample Books
Send Messages
Training

Subscription Editor

Subscription Info

Group	Decision Health
Reseller	CCB
Demo/Paid	standard **1**
Start Date	2010-01-01
Expires	2011-01-01 ▼

[Save Subscription Info]

Actions & Navigation

➡ View/edit the renewal for this subscription
⬅ View/edit the previous subscription **2**
❌ Terminate this subscription

Products

add new product: [ ] ▼ **3**

Product **4**	Order Type **5**	Promo Code	Licenses Used/Total	Active	Expires	
Dorland's Dictionary	renewal	Promo-R-2	**6** 1 / 5 **7**	2010-01-01	2011-01-01 ▼	**8** ✦ ❌ **9**
Expert CustomCoder	renewal	Promo-R-1	2 / 20	2010-01-01	2011-01-01 ▼	✦ ❌
Sample Addon	renewal	AddonPromo	1 / 1	2010-01-01	2011-01-01 ▼	✦ ❌

[Save Products List] **10**

Subscription History

➕ Add a comment

There has been no order activity.

1. The main subscription info refers to the "bucket" that the products are put into. Indicates subscription type and effective dates (products have their own effective dates within the subscription)
2. Links for this subscription - allows you to navigate between renewals, or to delete or terminate the subscription. (Future subscriptions can be deleted; current subscriptions can be terminated as of today but can not be deleted)
3. Use this drop down to add more products or addons to a subscription.
4. Products are listed in bold, and addons are listed in normal text
5. Order Type column shows how this product was added to the subscription.
6. The current number of licenses used
7. The current number of licenses available
8. Upgrade/downgrade button - use this to change the product
9. Cancel button - this will remove a single product from the subscription, but leave the rest of the subscription intact.
10. Submit button - use this to submit any changes you have made to license count or promo codes.

Credit Assignment Page

1. Counter shows the number of credits available at the group level. This will decrease as you add credits to the users.
2. Increment/decrement user credits. This will move credits from the group counter to the user counter.
3. Click 'Save' when you are done.

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