

R17 User Documentation

From CCB Local Wiki

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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



Luke Scott

Customer Information

Reseller: **CCB** Royalty Exempt: Individual
 ID: 13200 Group (send message)
 Actions:

Name: **Luke Scott** Active: Yes - Deactivate
 Username: jlukecott Verified: Yes
 Job Title: Developer AMA Accepted: Yes
 Clinic: DH Partner: N/A
 E-mail: luscott@ucg.com Partner ID: N/A
 Note: Changing the customer's e-mail will send them a reactivation e-mail Group(s): Decision Health (admin)
 External ID(s): 1 (Legacy)

Phone: 206.325.0485
 Address: 1408A S Lander St
 City: Seattle
 State: WA
 Zip: 98144
 Referral:

Login History (Total: 538) [Log in as this Customer](#)

Date	When	Action	Last	Current	IP	Browser
2010-03-29 13:22:52	3 seconds ago	login			127.0.0.1	Firefox 3.5
2010-03-29 13:22:44	11 seconds ago	logout		none	127.0.0.1	Firefox 3.5

[see more...](#)

Subscriptions

Products	Demo/standard	Group	Expires	Actions
Dorland's Dictionary 1	Demo/standard 2			
Expert CustomCoder	standard	Decision Health	2011-01-01	View/Edit 3
Sample Addon				
Premium CustomCoder	standard	Decision Health	2011-02-01	View/Edit
Dorland's Dictionary	standard	Decision Health	2012-01-01	View/Edit
Expert CustomCoder				

[show 2 expired subscriptions](#) **4**

Credits [Order Credits](#)

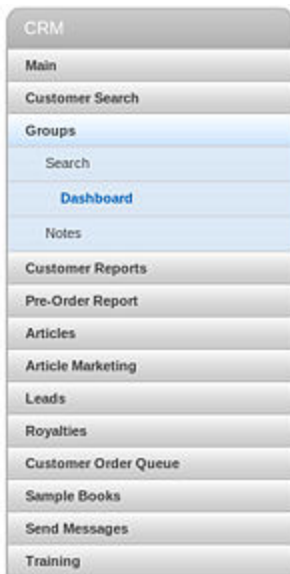
30 **5**

Ask the Expert

Customer Credits

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



Group Dashboard

Reseller: **CCB** Royalty Exempt: Save
 Name: **Decision Health** Actions: (send message) External ID(s):
 ID: 200 No external IDs found.
 Street: [empty]
 City: [empty]
 State: [empty]
 Zip: [empty]
 Phone: [empty]
 Org Type: Please choose a type of Organization...
 Org Size: Please choose a number of Physicians...

Group Members + Add a Member

Member	Admin	Login Count	Last Login	Actions
Bart Simpson	No	0	Member has not logged in.	<input type="checkbox"/> <input type="checkbox"/>
Crusty the Clown	No	0	Member has not logged in.	<input type="checkbox"/> <input type="checkbox"/>
Luke Scott	Yes	537	3/29/2010 1:18 pm	<input type="checkbox"/> <input type="checkbox"/>

Subscriptions 1+ New Subscription

Products 2	Order Type	Active Licenses	Demolstandard	Active/Expire	Actions 4	<input type="checkbox"/>
Dorland's Dictionary	renewal	3 / 5	standard	2010-01-01 2011-01-01	View/Edit Renew Terminate	<input type="checkbox"/>
Expert CustomCoder	renewal	2 / 20				
Sample Addon	renewal	1 / 1				
Premium CustomCoder	renewal	1 / 20	standard	2009-12-01 2011-02-01	View/Edit Renew Terminate	<input type="checkbox"/>
Sample Addon	renewal	0 / 5				
Dorland's Dictionary	renewal	1 / 5	standard	2011-01-01 2012-01-01	View/Edit Renew Delete	<input type="checkbox"/>
Expert CustomCoder	renewal	2 / 20				

[show 2 expired subscriptions 5](#) Merge selected subscriptions

Credits

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Ask the Expert

Group Credits

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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



Subscription Editor

Subscription Info

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

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 / 5 7	2010-01-01	2011-01-01	8 9
Expert CustomCoder	renewal	Promo-R-1	2 / 20	2010-01-01	2011-01-01	9
Sample Addon	renewal	AddonPromo	1 / 1	2010-01-01	2011-01-01	9

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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

Enterprise

Members

Notes

Group Credits for Decision Health

Ask the Expert Credits

Assignable Credits

30
Ask the Expert
Group Credits

1

Credits Assigned to Group Members

Member	Credits
Bart Simpson	0 2
Crusty the Clown	0
Luke Scott	0

3 Save Cancel

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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- This page was last modified on 30 March 2010, at 20:22.