

Managing Subscriptions

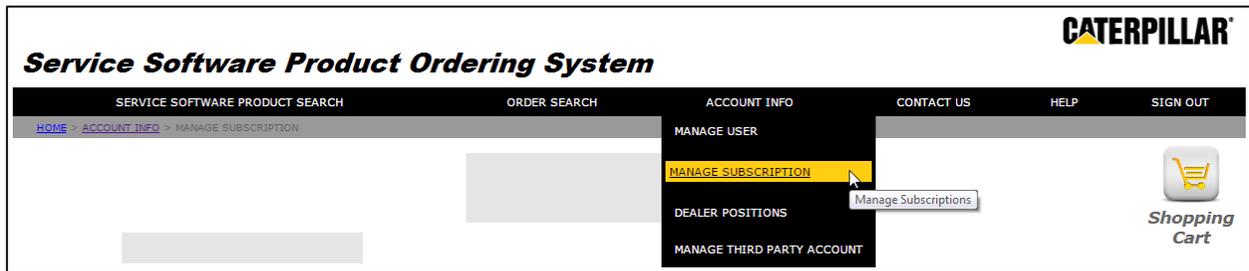
Objectives

- This guide will explain how to find a subscription.
- This guide will explain how to update a subscription.
- This guide will explain how to delete a subscription.

Instructions

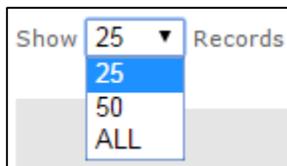
Step 1: Navigate to the “Manage Subscription” Page

1. Hover your cursor over “Account Info”
2. Select the “Manage Subscription” option



Step 2: Search for a Subscription

1. A list of Subscriptions for your dealership will appear.
 - a. Headings are sortable
2. You may change the number of Dealer Positions displayed to 25, 50, or ALL.



3. You may enter specific search criteria for each radio button such as:
 - a. Media Number
 - b. Company Name
 - c. Dealer Position
 - d. Attention Name
 - e. Modified Date

Manage Subscription

Search subscriptions by Media Number OR Dealer Position OR Modified Date

Media Number
 Dealer Position

Attention
 Company

Modified Date

Step 3: Edit an Existing Subscription - Address

1. Find the Subscription and/or Dealer Position you want to change the address on.
2. Select the "Dealer Position" link in the middle of the page.
3. Make changes to Company Name, Attention, Address, or any other text fields.
4. Select the "Save" button.

Manage Subscription

Search subscriptions by Media Number OR Dealer Position OR Modified Date

Media Number
 Dealer Position

Attention
 Company

Modified Date

NOTE: Additional quantity will be added to existing order and delivered at NEXT regular distribution - OR - User must create a new order for immediate delivery.

Show Records

Column/Data can be sorted by clicking the column headings.

| Media Number | Mail Code | DVD Type | Frequency | Quantity | Dealer Position | Company | Attention | Modified By | Modified Date | Last Action | | |
|-------------------------|---------------------------|----------------------|----------------------------------|--------------------------|----------------------------|------------------------------|--------------------------------|--------------------------------------|---------------------------|------------------------|---------------------------------|-------------------------------------|
| Media # | Mail Code | Type | # of Updates per | Quantity | Position # | Company Name | Attention Name | System User's CWS ID | Date/Time | Action | Update Quantity | Cancel Subscription |

Add|Edit Dealer Position

Fields marked with an asterisk (*) are required.

* Dealer

Dealer Position

* Company

* Attention

* Address 1

Address 2

Address 3

Address 4

* City

* Country

State/Province

* Postal Code

* Phone

Extension

Fax

Status Active Inactive

Step 4: Edit an Existing Subscription - Quantity

1. Find the Subscription and/or Dealer Position you want to change the address on.
2. Select the "Update Quantity" link on the right side of the page.
3. Input the quantity you want in the Quantity section.
 - a. You may increase the quantity or decrease the quantity.
 - b. The increased amount will reflect in the ***next*** update shipment.
 - c. If you need media to be sent out **immediately**, place a **new order** instead for the media you need and select this position during checkout.
4. Select the "Update" link on the right side of the page to save the changes.

Manage Subscription

Search subscriptions by Media Number OR Dealer Position OR Modified Date

Media Number Dealer Position
 Attention Company
 Modified Date

NOTE: Additional quantity will be added to existing order and delivered at NEXT regular distribution - OR - User must create a new order for immediate delivery.

Show Records

Column/Data can be sorted by clicking the column headings.

| Media Number | Mail Code | DVD Type | Frequency | Quantity | Dealer Position | Company | Attention | Modified By | Modified Date | Last Action | | |
|-------------------------|---------------------------|----------------------|----------------------------------|--------------------------|----------------------------|------------------------------|--------------------------------|--------------------------------------|---------------------------|------------------------|---------------------------------|-------------------------------------|
| Media # | Mail Code | Type | # of Updates per | Quantity | Position # | Company Name | Attention Name | System User's CWS ID | Date/Time | Action | Update Quantity | Cancel Subscription |

| Media Number | Mail Code | DVD Type | Frequency | Quantity | Dealer Position | Company | Attention | Modified By | Modified Date | Last Action | | |
|-------------------------|---------------------------|----------------------|---------------------------------|--------------------------|----------------------------|------------------------------|--------------------------------|-------------------------------|---------------------------|------------------------|------------------------|------------------------|
| Media # | Mail Code | Type | # of Updates pe | Quantity | Position # | Company Name | Attention Name | User's CWS ID | Date/Time | Action | Update | Cancel |

Step 5: Cancel a Subscription

1. Find the Subscription and/or Dealer Position you want to cancel.
2. Select the "Cancel Subscription" link on the right side of the page.
3. Select "OK" in the pop-up confirmation window.

Manage Subscription

Search subscriptions by Media Number OR Dealer Position OR Modified Date

Media Number Dealer Position
 Attention Company
 Modified Date

NOTE: Additional quantity will be added to existing order and delivered at NEXT regular distribution - OR - User must create a new order for immediate delivery.

Show Records

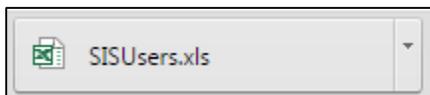
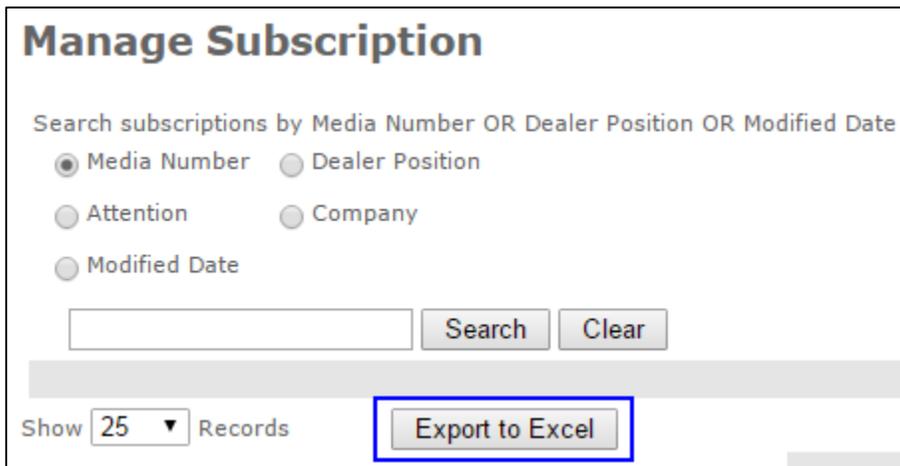
Column/Data can be sorted by clicking the column headings.

| Media Number | Mail Code | DVD Type | Frequency | Quantity | Dealer Position | Company | Attention | Modified By | Modified Date | Last Action | | |
|-------------------------|---------------------------|----------------------|----------------------------------|--------------------------|----------------------------|------------------------------|--------------------------------|--------------------------------------|---------------------------|------------------------|---------------------------------|-------------------------------------|
| Media # | Mail Code | Type | # of Updates per | Quantity | Position # | Company Name | Attention Name | System User's CWS ID | Date/Time | Action | Update Quantity | Cancel Subscription |



Step 6: Export the User List

1. Select the "Export to Excel" button.
2. Once the file is created, click to open the file in MS Excel.



Contact Us

If you need assistance or have any questions, please contact the TIAS Inbox:

Technical_Information_Access_Solutions@cat.com