# 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

Service Software Product C	Ordering System	n		CAT	<b>ERPILLAR</b> <sup>®</sup>
SERVICE SOFTWARE PRODUCT SEARCH	ORDER SEARCH	ACCOUNT INFO	CONTACT US	HELP	SIGN OUT
HOME > ACCOUNT INFO > MANAGE SUBSCRIPTION		MANAGE USER			
		MANAGE SUBSCRIPTION DEALER POSITIONS MANAGE THIRD PARTY ACCOL	Manage Subscriptions		Shopping Cart

### 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 <ul> <li>Media Number</li> <li>Dealer Position</li> </ul>				
Attention Company				
Modified Date				
NEXG5007 Search Clear				

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 O Dealer Position								
Attention     Company								
Modified Date								
Search Clear	Search Clear							
NOTE: Additional quantity will be added to existing order and	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 25 TRecords Export to Excel								
	Column/Data can be so	rted by clicking the col	umn headin	gs.				
Media Mail DVD Number Code Type Frequency Quantity Deale Position	r Company	Attention	Modified By	Modified Date	Last Action			
Media # Mail Type # of Updates per Quantity Position	# Company Name	Attention Name	System User's CWS ID	Date/Time	Action	<u>Update</u> Quantity	<u>Cancel</u> Subscription	

Add Edit	Dealer Position
Fields marked v	vith an asterisk ( * ) are required.
* Dealer	Dealer Code & Dealer Name
Dealer Position	Dealer Code - Position #
* Company	Company
* Attention	Attention Name
*Address 1	Street Address
Address 2	
Address 3	
Address 4	
* City	City
* Country	Country
State/Province	State
* Postal Code	Zip Code
* Phone	Phone #
Extension	
Fax	
Status	<ul> <li>Active Inactive</li> </ul>
Save Ca	ncel

#### 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 O Dealer Position								
Company								
O Modified Date								
Search Clear								
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 25 • Records Export to Excel								
Column/Data can be sorted by clicking the column headings.								
Media Number         Mail Code         DVD Type         Frequency Position         Dealer Position         Company         Attention         Modified By         Modified         Last Action								
Media #         Mail Code         Type         # of Updates per         Quantity         Position #         Company Name         Attention Name         System User's CWS ID         Date/Time         Action	<u>Update</u> Quantity	<u>Cancel</u> Subscription						

Media Number	Mail Code	DVD Type	Frequency	Quantity	Dealer Position	Company	Attention	Modified By	Modified Date	Last Action		
Media #	Mail Code	Туре	# of Updates pe		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 subscript Media Numb	Search subscriptions by Media Number OR Dealer Position OR Modified Date										
Attention	O Co	mpany									
Modified Date	e										
		Sea	rch Cle	ar							
NOTE: Additiona	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 25 TR	cords	Export	to Excel								
					Column/Data can be so	rted by clicking the col	umn headir	igs.			
Media Ma Number Cod	l DVD e Type	Frequency	Quantity	Dealer Position	Company	Attention	Modified By	Modified Date	Last Action		
Media # Mail Code	Туре	# of Updates per	Quantity	Position #	Company Name	Attention Name	User's CWS ID	Date/Time	Action	<u>Update</u> <u>Quantity</u>	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.

Manage Subscription					
Search subscriptions by Media Number OR Dealer Position OR Modified Date Media Number Dealer Position					
Attention Company					
Modified Date					
Search Clear					
Show 25  Records Export to Excel					
SISUsers.xls					

## **Contact Us**

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

Technical\_Information\_Access\_Solutions@cat.com