

# Portal Introduction

## A Quick “How-To” Guide for Viewing & Paying Invoices

### DASHBOARD

The Dashboard is the first thing you will see when logging into the Portal

- From here you may quickly view invoices and make payments using the prominent tiles
  - The tiles will link to the same “Open Invoices” portal segment
- Using the three-bar menu, you may change your password or logout

**AUREON™**

Dashboard Open Invoices Invoices Payments AutoPay Service ▾

Total Balance  
\$35,076.20  
(4 INVOICES)  
MAKE PAYMENT

Past Due Amount  
\$30,618.83  
(1 INVOICES)  
MAKE PAYMENT

WELCOME TO OUR BILLING PORTAL

### OPEN INVOICES

Click the “OPEN INVOICES” menu option:

- All currently open invoices in our system are listed here; please let us know if items are missing
  - If needed, you may conveniently sort and filter with the three-bar button
  - Select the items you wish to pay, and click “Pay Selected”

**AUREON™**

Dashboard **Open Invoices** Invoices Payments AutoPay Service ▾

Search Invoice Numbers SEARCH [Filter Icon]

QUICK ACTIONS  
SELECT ALL DESELECT ALL PAY SELECTED

INVOICE NUMBER	BALANCE	TOTAL	DUE DATE	MORE
<input type="checkbox"/> 999620	\$30,618.83	\$30,618.83	7/30/19	MORE
<input checked="" type="checkbox"/> 112131	\$64.70	\$10,064.70	9/30/19	MORE
<input type="checkbox"/> 123456	\$3,939.00	\$3,939.00	10/15/19	MORE

## OPEN INVOICES (cont.)

Clicking "MORE" on any invoice will display a details window:

- Please "VIEW" to see the specific line items in PDF format
  - The PDF will open in a new browser tab
    - If you encounter issues, try using Google Chrome or temporarily allow pop-ups
  - You may print/save the PDF as desired
  - Click on "Comment" to send us an inquiry regarding an invoice

The screenshot shows the 'Open Invoices' interface. A details window is open for invoice 112131. The window has a header with the invoice number '112131' and summary statistics: DUE DATE 9/30/19, TOTAL \$10,064.70, BALANCE \$64.70, TRAN. DATE 8/31/19, and POS --. Below the header are three tabs: SUMMARY, EMAIL, and COMMENT. The SUMMARY tab is active, showing a table with columns AMOUNT and TRANSACTION DATE. The table has one row: \$129,404.87 on 9/15/19 with a green checkmark. At the bottom of the window are buttons for PAY (circled in red), VIEW (with an arrow pointing to it), and CLOSE. The background shows a list of other invoices with 'MORE' buttons.

To process a payment:

- Select the checkbox of one (or multiple) invoice(s); click "PAY SELECTED"
  - A dialog will appear; please select a payment method on file, or add a new entry
    - Partial payment amounts can be entered in the top right corner
    - You have the option of splitting payments with multiple payment methods

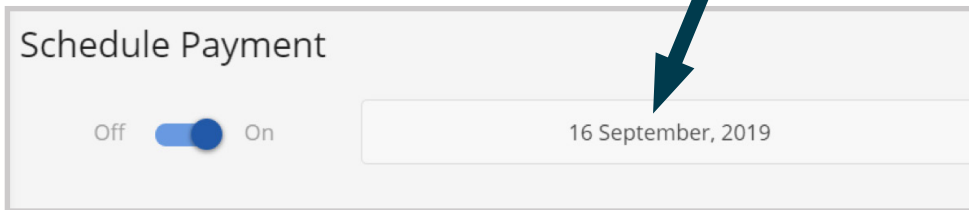
The screenshot shows a payment confirmation dialog. The dialog has a header with 'Details | Summary | Confirmation' and a close button. It is divided into two main sections: 'Wallet' and 'Invoices'. The 'Wallet' section shows logos for AMERICAN EXPRESS and VISA, with a red box around the AMERICAN EXPRESS logo and a plus sign button. The 'Invoices' section shows invoice 112131 with Due: 9/30/19 and Balance: \$64.70. A text input field contains the amount '64.7' with an arrow pointing to it. Below the input field is a table with the following data: Subtotal \$64.70, Adjustments \$0.00, and Grand Total \$64.70. At the bottom left is a 'CANCEL' button and at the bottom right is a 'SUBMIT' button (circled in red).

Clicking "SUBMIT" will give you a chance to review your actions.

## OPEN INVOICES (cont.)

Advanced payment options:

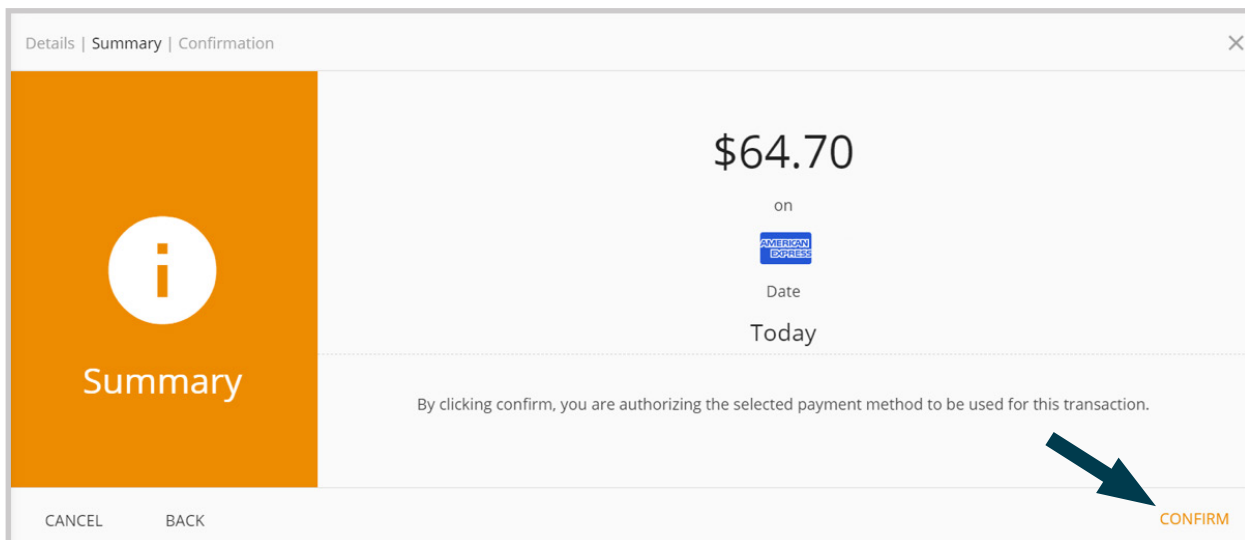
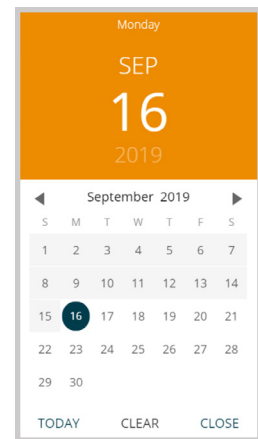
- Selecting the “Schedule Payment” switch to “ON” offers the ability to pick a specific payment date, using the Date Picker
  - This is not an “auto-pay” but rather a one-time future payment



Schedule Payment

Off  On

16 September, 2019



Details | Summary | Confirmation

\$64.70

on

AMERICAN EXPRESS

Date

Today

By clicking confirm, you are authorizing the selected payment method to be used for this transaction.

CANCEL BACK CONFIRM

Clicking “CONFIRM” will yield a payment success or failure screen.

- An email receipt will be sent to your login email address
  - You may send any additional receipts using the “Add Email Receipt” field
- If the payment is scheduled for the future, the receipt will show the scheduled payment date

## INVOICE HISTORY

Click on the "Invoices" menu option:

- Click "MORE" on previously issued and archaic invoices
  - You may again view specific details, or print and save the PDF
  - The page numbers on the right and search box can help narrow the results

INVOICE NUMBER	BALANCE	TOTAL	DUE DATE	
123456	\$3,939.00	\$3,939.00	10/15/19	MORE
789101	\$453.67	\$453.67	10/15/19	MORE
112131	\$64.70	\$10,064.70	9/30/19	MORE
415167	\$0.00	\$1,329.76	9/30/19	MORE
181920	\$0.00	\$3,939.00	9/14/19	MORE

## PAYMENTS

Click on the PAYMENTS menu option:

- View all currently pending, future scheduled (including AutoPay) or past historic payments

TRANSACTION	TOTAL PAYMENT	DATE	PAYMENT METHOD	
449409	\$129,404.87	9/16/19		✓
773015	\$437.94	9/14/19		✓
123456	\$3,939.00	9/14/19		✓
34876	\$1,329.76	9/9/19		✓

## AUTOPAY

Click on the AUTOPAY menu option:

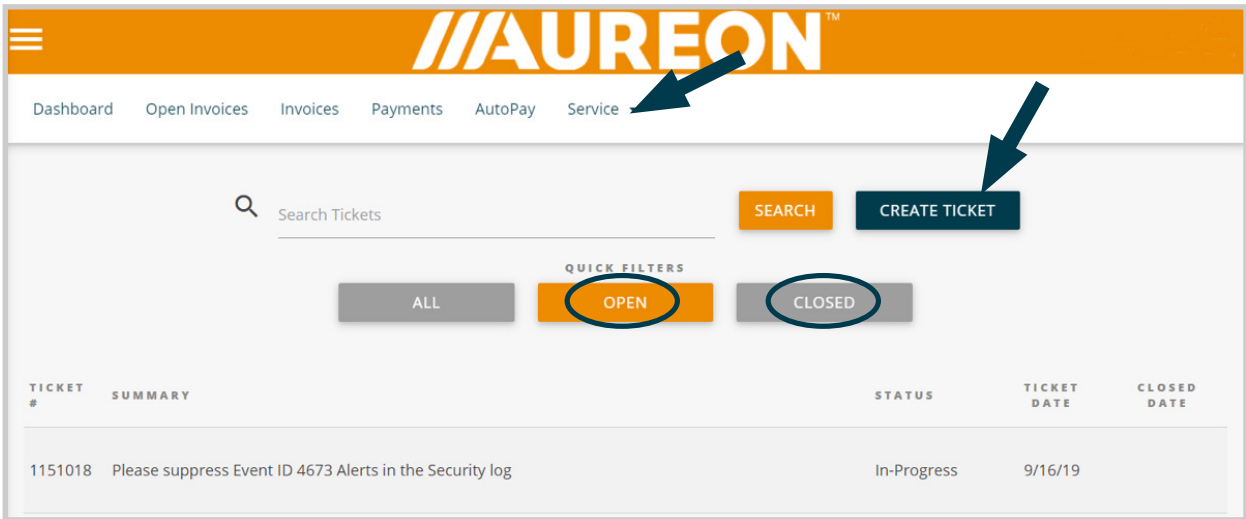
- Click “NEW” and expand to reveal the available options
- Configure your preferences in five steps, as per the example image below
  - Note: You can have more than one “AutoPay” rule/condition at a time
  - With the below “less than \$” example, “one-off” type invoices can also be paid automatically

1. Select the payment method you want this rule to follow
2. “On Due Date” will pay invoices matching the criteria on the date they are due (not created)
3. Select “Contract” or “Amount”
4. Pick the recurring service agreement you would like to be auto-paid
5. Save your changes

## SERVICE

Click on the “Service” menu option:

- Creating a new service ticket is easy
- You may also view historic tickets with the “Closed” filter



The screenshot shows the "Submit a Ticket" form. The form has the following fields: Summary, Department, Billing (with a dropdown arrow), and Description. At the bottom of the form, there are two buttons: "CANCEL" and "SUBMIT". A blue arrow points to the "SUBMIT" button.

## MOBILE

Mobile device navigation:

- The top menu bar is replaced by the lower right button but functions nearly the same

