



# **Navigating the Hilliard Customer Portal**

**Contents**

- 1. Customer Log In .....3**
- 2. Changing Password .....4**
- 3. Dashboard Overview .....5**
- 4. Entering a Service Call.....7**
- 5. Entering a Supply/Resupply Order .....9**
- 6 Making a Payment.....13**
- 7. Entering Meters.....16**

# 1. Customer Log In

Your customer portal url is <http://portal.hilliardos.com:4035>

You can also access the portal by visiting HilliardOS.com and navigating to **CUSTOMER PORTAL** in the top navigation.

1. Enter your email address in the Username field.
2. Enter the temporary password the first time you log in.
3. Click **Log In** to log in.

**HILLIARD**  
OFFICE SOLUTIONS

CUSTOMER PORTAL LOGIN

1 Your Email

2

Log In

## 2. Changing Password

Upon the first log in with the temporary password, you will need to change your password to avoid issues.

1. Enter the temporary (or existing password if previously changed)
2. Enter the new password  
**Note: Passwords must be a minimum of 6 characters including a letter and number. NO special characters are permitted.**
3. Retype the new password to ensure they match.
4. Choose a security question or create a custom question.
5. Enter your answer to the security question.
6. Click **Update Account** to save the changes.

The screenshot shows a web form titled "CHANGE PASSWORD" and "SECURITY QUESTION". A vertical line on the left side of the form has five yellow boxes with numbers 1 through 5, indicating the steps to follow. Step 1 points to the "Old Password" field. Step 2 points to the "New Password" field. Step 3 points to the "Repeat New Password" field. Step 4 points to the "Option 1" dropdown menu. Step 5 points to the "Security Answer" field.

**CHANGE PASSWORD**

Old Password: \*  
1 [.....]

New Password: \*  
2 [.....]

Repeat New Password: \*  
3 [.....]

**SECURITY QUESTION**

Option 1 - Select a predefined question from the list below:  
4 [In what city did you meet your spouse/significant other? ▼]

OR Option 2 - Create your own security question: (max. 200 characters)  
Custom Security Question:  
[.....]

Security Answer: (max. 100 characters) \*  
5 [Scottsdale]

[Update Account]

### 3. Dashboard Overview

Once logged in to the Customer Portal, the dashboard will appear. The dashboard offers the following options:

The screenshot shows the Hilliard Office Solutions Customer Portal. On the left is a navigation sidebar with options like 'Change password | Logout', 'CURRENT BALANCE \$36,389.49 USD', and various order and report actions. The main content area is titled 'WELCOME TO CUSTOMER PORTAL!' and features three primary sections: 'MY EQUIPMENT', 'ORDERS', and 'INVOICES'. Each section contains a table of data with various columns and a pagination control at the bottom of each table.

At the top of the dashboard you will see a list of your equipment with shortcuts to order supplies or place a service call.

ID	Equipment Type	Mfg Serial #	Address	On Contract	Orders	Service Calls
152	<a href="#">Order Supplies   New Service Call</a> Konica Minolta Konica Minolta BH 224E	6790092		No	0	2
27	<a href="#">Order Supplies   New Service Call</a> Konica Minolta Konica Minolta Bizhub 364e MFP	KL498017300		Yes	2	3
28	<a href="#">Order Supplies   New Service Call</a> Konica Minolta Konica Minolta Bizhub 364e MFP	KL498017301		Yes	1	2
34	<a href="#">Order Supplies   New Service Call</a> Konica Minolta Konica Minolta Bizhub 364e MFP	KL498017302		No	0	4
35	<a href="#">Order Supplies   New Service Call</a> Konica Minolta Konica Minolta Bizhub 364e MFP	KL498017303		No	1	2
36	<a href="#">Order Supplies   New Service Call</a> Konica Minolta Konica Minolta Bizhub 364e MFP	KL498017304		No	1	2
73	<a href="#">Order Supplies   New Service Call</a> Konica Minolta Konica Minolta Bizhub 364e MFP	KL498017305		No	0	1
75	<a href="#">Order Supplies   New Service Call</a> Konica Minolta Konica Minolta Bizhub 364e MFP	KL498017306		No	0	2
77	<a href="#">Order Supplies   New Service Call</a> Konica Minolta Konica Minolta Bizhub 364e MFP	KL498017307		No	0	2
163	<a href="#">Order Supplies   New Service Call</a> Konica Minolta Konica Minolta Bizhub 364e MFP	KL498017308		Yes	0	9

Page 1 of 4 (32 Records) 1 2 3 4

On the right side is a list of options that are available, including account balance

At the bottom of the screen are a list of recent orders and invoices. To run a more detailed report choose **Billing** or **Orders** on the right side of the page.

ORDERS							
Order #	Status	Posting Date	Due Date	GrandTotal	Currency	Vendor	
10187	Closed	4/26/2018	4/26/2018	\$9,441.92 USD	USD	FEDEX Group	
10177	Open	3/19/2018		\$22,149.08 USD	USD		
10174	Closed	3/15/2018	3/15/2018	\$8,433.05 USD	USD	FEDEX Group	
10173	NC Rental Open	3/12/2018		\$7,800.00 USD	USD		
10171	Closed	3/6/2018	3/6/2018	\$19,082.73 USD	USD	FEDEX Group	
10170	Closed	3/6/2018	3/6/2018	\$511.03 USD	USD	FEDEX Group	
10159	Open	1/23/2018		\$106.86 USD	USD		
10151	Closed	11/13/2017	11/15/2017	\$13,772.42 USD	USD	FEDEX Group	
10149	Closed	10/27/2017	10/27/2017	\$19,935.75 USD	USD	FEDEX Group	
10147	T Open	10/10/2017		\$107.95 USD	USD		

INVOICES							
Invoice #	Ref #	Status	Posting Date	Due Date	GrandTotal	Currency	
5293		Closed	4/26/2018	5/26/2018	\$9,441.92 USD	USD	
5283	PO 45689	Closed	3/20/2018	3/20/2018	\$550.76 USD	USD	
5277	PO 45689	Open	2/24/2018	3/26/2018	\$149.37 USD	USD	
5276	PO 45689	Closed	3/19/2018	3/19/2018	\$149.37 USD	USD	
5264	PO 45689	Closed	3/6/2018	4/5/2018	\$149.37 USD	USD	
5240	PO 45689	Closed	3/5/2018	4/4/2018	\$550.76 USD	USD	
5239	PO 45689	Open	2/1/2018	3/3/2018	\$635.06 USD	USD	
5238	PO 45689	Open	1/1/2018	1/31/2018	\$271.50 USD	USD	
5224		Closed	11/15/2017	12/15/2017	\$0.00 USD	USD	
5223	Johanna	Closed	11/15/2017	12/15/2017	\$14,258.70 USD	USD	

## 4. Entering a Service Call

Locate the machine that needs to have a service call placed.

1. Click the **New Service Call** link.
2. Enter a subject for the service call. The subject field is limited to 100 characters.
3. If the machine that was selected is not correct, you can change the machine on the service call window by selecting it from the dropdown.

### NEW SERVICE CALL

Use the following form to submit your information and create a new service call.

\* indicates required field.

Contact Person

Email

Subject \*

Machine is Jamming

Equipment Type

Konica Minolta BH 224E

Serial Number

EQ0001

Equipment Address

Manufacturer Serial #

6790092

Location

Active Contract

No

152 - Konica Minolta BH 224EEQ0001 (#6790092) -

Below the equipment is where the priority of the call can be set.

There is a description field that you can provide any additional details that did not fit in the subject line.

4. Click Create Service Call to create the service call for your equipment.

Priority

Low

Description \*

The machine wont print and is jammed. There is an error code on the screen saying to clear the jam.

Create Service Call Cancel

The service call will be submitted to the system. The service call can be viewed by going to Service Calls > Open Service Calls CP

Service Calls navigation menu:

- Service Calls
- BACK
- New Service Call
- Open Service Calls CP
- Closed Service Calls

Phone icon highlighted in the sidebar.

OPEN SERVICE CALLS CP

Export

callid	Date	Subject	Equipmentid	insID	MFG Serial	Equipment Type	Technician	Status	Contact Name
1432	5/2/2018	Machine is Jamming	EQ0001	152	6790092	Konica Minolta BH 224E		Open	Jennifer Walker
1431	5/2/2018	test call	EQ0001	152	6790092	Konica Minolta BH 224E		Open	Jennifer Walker



## 5. Entering a Supply/Resupply Order

In the menu, choose “Resupply Order”, or in the equipment list, choose “Order Supplies”

The screenshot shows the Customer Portal interface. On the left, there is a sidebar with a 'Resupply Order' button highlighted by a red box. The main content area displays a 'MY EQUIPMENT' table with two rows. The first row has '152' in the ID column and 'Order Supplies | New Service Call' in the next column, also highlighted by a red box. The second row has '27' in the ID column and 'Order Supplies | New Service Call' in the next column.

ID		Equipment Type	Mfg Serial #	Adi
152	Order Supplies   New Service Call	Konica Minolta Konica Minolta BH 224E	6790092	15-850
27	Order Supplies   New Service Call	Konica Minolta Konica Minolta Bizhub 364e MFP	KL498017300	15-850

*Note: if you choose “Order Supplies” by a machine, only the items available for that machine will be available to be selected.*

Simply Check the box beside the items that must be ordered. Once all the items are selected, click “Finalize Order” to review before submitting the order.

The screenshot shows the order entry form. It contains three sections, each for a different machine. Each section has a table of supplies with checkboxes. The 'Finalize Order' button at the bottom is highlighted by a red box.

Supply Name	Item Code	UoM	Currency	List Price	
TN-324K Toner Black (C258/C308/C368: 28k)	A8DA130	EA	USD		<input checked="" type="checkbox"/>

188 - TJS7890 - Konica Minolta Bizhub 364e MFP (#KL498017319)  
Active Contract : Yes

Supply Name	Item Code	UoM	Currency	List Price	
TN-324K Toner Black (C258/C308/C368: 28k)	A8DA130	EA	USD		<input checked="" type="checkbox"/>

141 - TSS123 - Konica Minolta Bizhub C364E MFP (#ARTUL2175)  
Any Street USA  
Active Contract : No

Supply Name	Item Code	UoM	Currency	List Price	
TN-321C CYAN TNR C224/C28	A33K430	EA	USD		<input checked="" type="checkbox"/>
TN321K BLK TNR C224/284/e	A33K130	EA	USD		<input checked="" type="checkbox"/>
TN-321M MAG TNR C224/284	A33K330	EA	USD		<input type="checkbox"/>
TN-321Y YLLW TNR C224/284	A33K230	EA	USD		<input type="checkbox"/>

Subtotal \$311.40 **Finalize Order**

Update the Request Delivery Date if necessary

Enter your P.O. Number for your own tracking purposes

Note that the pricing may be adjusted to account for items covered under contract.

**Company Name  
Account Info.**

Request Delivery Date:  
5/3/2018

All The Prices Are In:

Billing Address

Any Street USA

Any Street USA

Shipping Address

Any Street USA

Any Street USA

P.O. Number

JW00123

**Order Items**

TN-324K Toner Black (C258/C308/C368: 28k)

A8DA130

Item Price : \$57.60

Covered : Yes

1

Line Total:

\$0.00

x

Equipment Address

Equipment Type  
Konica Minolta Bizhub 364e  
MFP

Serial Number  
TJS7888

Manufacturer Serial #  
KL498017320

TN-324K Toner Black (C258/C308/C368: 28k)

A8DA130

Item Price : \$57.60

Covered : Yes

1

Line Total:

\$0.00

x

Equipment Address

Equipment Type  
Konica Minolta Bizhub 364e  
MFP

Serial Number  
TJS7890

Manufacturer Serial #  
KL498017319

Please Note: Any prices listed are for demonstration purposes only

1. Click the “Add Equipment” dropdown to select an additional piece of equipment to order supplies for. Alternatively, choose the “Add Other Items” to search for additional items to order.
2. Update the shipping method if necessary.
3. Add any notes you need to communicate to the Hilliard supply team.
4. Click “Refresh Total” to update the document total.
5. When finished, click “Submit Order” to submit the order.

If you would like to start over, click “Clear Order”.

TN321K BLK TNR C224/284/e  
A33K130

Item Price : \$57.60    Covered : No    1    Line Total: \$57.60    ✕

Equipment Address	Equipment Type	Serial Number	Manufacturer Serial #
	Konica Minolta Bizhub C364E MFP	TSS123	ARTUL2175

- Select Equipment

**Add Supplies**

Select shipping method  
Company Truck

Notes  
Please deliver to receptionist

Subtotal	\$196.20
Tax	\$15.60
Total	\$211.80

**Refresh Totals**

**Submit Order**    Clear Order

Please Note: Any prices listed are for demonstration purposes only

Once the order is submitted, the page will refresh with a review of the order.

**Company Name**  
**Account Info.**

C001000



Bill To Address: 5559 E Main Street Suite B

Ship To Address 15156 N 76th Street Phoenix,

PO #

JW00123

**ORDER ITEMS**

<b>A8DA130</b> TN-324K Toner Black (C258/C308/C358: 28k)	Item Price : \$0.00 USD	Quantity 1	Line Total: \$0.00 USD	Covered : Yes
Equipment Address 15156 N 76th Street, Phoenix, AZ, 85033	Equipment Type Konica Minolta Bizhub 364e MFP	Serial Number TJ57555	Manufacturer Serial # KL498017320	
<b>A8DA130</b> TN-324K Toner Black (C258/C308/C358: 28k)	Item Price : \$0.00 USD	Quantity 1	Line Total: \$0.00 USD	Covered : Yes
Equipment Address 15156 N 76th Street, Phoenix, AZ, 85033	Equipment Type Konica Minolta Bizhub 364e MFP	Serial Number TJ57590	Manufacturer Serial # KL498017319	
<b>A33K430</b> TN-321C CYAN TNR C224/C28	Item Price : \$138.60 USD	Quantity 1	Line Total: \$138.60 USD	Covered : No
Equipment Address 15156 N 76th Street, Phoenix, AZ, 85033	Equipment Type Konica Minolta Bizhub C364e MFP	Serial Number T55123	Manufacturer Serial # ARTUL2175	
<b>A33K130</b> TN321K BLK TNR C224/284e	Item Price : \$57.60 USD	Quantity 1	Line Total: \$57.60 USD	Covered : No
Equipment Address 15156 N 76th Street, Phoenix, AZ, 85033	Equipment Type Konica Minolta Bizhub C364e MFP	Serial Number T55123	Manufacturer Serial # ARTUL2175	

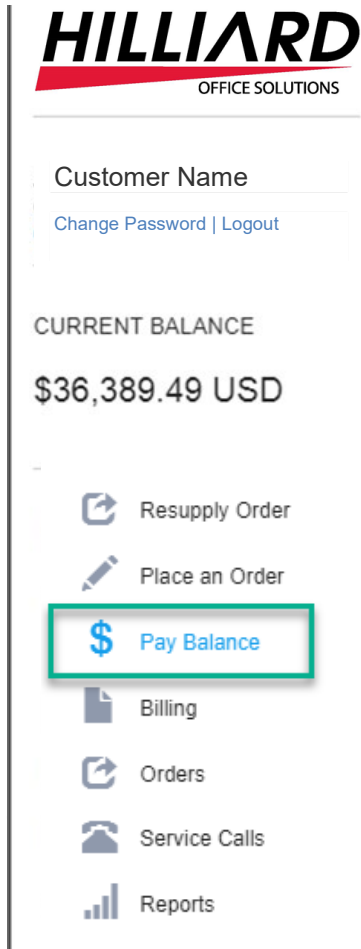
Subtotal	\$196.20 USD
Tax	\$15.60 USD
<b>Total</b>	<b>\$211.80 USD</b>

Order Notes

Please deliver to receptionist

## 6. Making a Payment

1. Log in to the Customer Portal
2. Click on “Pay Balance” in the Main Menu



3. In the “Make A Payment” window, check the box in the “Pay” column beside the invoice(s) **(A) you would like to pay**. Alternatively, if partial payments are enabled, you can click the pencil beside the “**Payment Amount**” **(B)** to edit the amount you would like to pay.

Additionally, if you would like to make a payment on account, not tied to an invoice, enter that amount in the **Payment on account field (C)**.

4. Once ready, click the “Make a Credit Card Payment” button or the Make ACH Payment button to be taken to the screen to fill in formation.

Please Note: Any prices listed are for demonstration purposes only

## MAKE A PAYMENT

Customer Information  
 1212 Any Street  
 Any Town, 77879

The following is an up-to-date statement of activities on your account. Use this page to pay online using your credit card or you can remit payment to the above address.

**Select All**   Unselect All

Type	Date	Doc #	Reference	Due Date	Original	Amount Due	Pay	Payment Amount	Balance
Journal entry	2/15/2018	658		2/15/2018	\$14,138.32	\$14,138.32	<input type="checkbox"/>	\$0.00 /	\$14,138.32
Credit Memo	4/29/2018	108		4/29/2018	\$-41.23	\$-41.23	<input type="checkbox"/>	\$0.00 /	\$-41.23

Credit memo	10/9/2019	32		10/9/2019	\$-1.73	\$-1.73	<input type="checkbox"/>	\$0.00 /	\$-1.73
Invoice	9/18/2019	5591		10/18/2019	\$426.41	\$426.41	<input type="checkbox"/>	\$0.00 /	\$426.41
Invoice	1/27/2020	5630	1234	2/26/2020	\$51.50	\$51.50	<input type="checkbox"/>	\$0.00 /	\$51.50
Invoice	2/4/2020	5633		3/5/2020	\$41.97	\$41.97	<input checked="" type="checkbox"/>	\$41.97 /	\$0.00
Invoice	2/4/2020	5634		3/5/2020	\$783.40	\$783.40	<input checked="" type="checkbox"/>	\$500.00 /	\$283.40
Invoice	2/4/2020	5635	101	3/5/2020	\$489.66	\$489.66	<input checked="" type="checkbox"/>	\$489.66 /	\$0.00
Invoice	2/4/2020	5636	013456	3/5/2020	\$537.67	\$537.67	<input type="checkbox"/>	\$0.00 /	\$537.67
Payment	3/31/2020	138		3/31/2020	\$-8,403.34	\$-8,403.34	<input type="checkbox"/>	\$0.00 /	\$-8,403.34

**C** Payment on account:

**D**

Total Payment: **\$1,131.63**

\*\*\* DEMO \*\*\* Make a Credit Card Payment \*\*\* DEMO \*\*\*

Make ACH Payment

Please Note: Any prices listed are for demonstration purposes only

5. Enter your payment information, any additional notes on the screen and click “Pay Balance”.

A list of the invoices you are paying and the amounts appears at the bottom of the window. If you would like to change the invoices, click “Change Selection” to be taken back to step 3 to update the selection.

### MAKE A CREDIT CARD PAYMENT

#### ENTER CARD DETAILS

Name on card: \*

Card Number:

Expiry:   CCV:

Card Type: \*

#### ADDRESS INFORMATION

Country\*

Street/PO Box: \*

City / State:\*

Zip:\*

Primary Phone:\*

Primary Email:\*

Amount to Pay:

**\$1,131.63 USD**

#### Notes

Thank you for the excellent service and support!

**Pay Balance**    Change Selections


Documents Selected					
Date	Type	Our Ref #	Reference	Due Date	Amount
2/4/2020	Invoice	5633		3/5/2020	\$41.97 USD
2/4/2020	Invoice	5634		3/5/2020	\$500.00 USD
2/4/2020	Invoice	5635		3/5/2020	\$489.66 USD
4/29/2020	On Account			4/29/2020	\$100.00 USD
					<b>\$1,131.63 USD</b>

6. The Address Information will disappear after clicking “Pay Balance” and will let you know if the payment is successful or if there was an error. You will also receive a confirmation email letting you know once your payment was successful.

## 7. Entering Meters

1. Locate the piece of equipment you would like to submit meters for. Click on the equipment id

DASHBOARD



**WELCOME TO CUSTOMER PORTAL!**

Customer Name

[Change Password](#) | [Logout](#)

CURRENT BALANCE

**\$36,389.49 USD**

Resupply Order

Place an Order

Pay Balance

Billing

Orders

Service Calls

Reports

MY EQUIPMENT

Equipment ID	Order Supplies   New Service Call	Equipment Type
T78980136		Konica Minolta C001000 - JPC Tech - KM Bizhub C364E MFP
EQ0001		Konica Minolta Konica Minolta BH 224E
IMPACT230942		Konica Minolta Konica Minolta BH 224E
DuaneWis		Konica Minolta Konica Minolta Bizhub 227 MFP
BEN TEST		Konica Minolta Konica Minolta Bizhub 364e MFP
M200		Konica Minolta Konica Minolta Bizhub 364e MFP
Test123		Konica Minolta Konica Minolta Bizhub 364e MFP
50090		Konica Minolta Konica Minolta Bizhub 364e MFP
65490		Konica Minolta Konica Minolta Bizhub 364e MFP
52020		Konica Minolta Konica Minolta Bizhub 364e MFP

[View All Equipment](#)

Page 1 of 6 (56 Records) ◀ 1 2 3 4 5 6 ▶

2. In the top right corner of the Equipment Information window, click the “Meters Needed” button.

*Note: If this button does not appear, no meters are need at this time.*

GENERAL INFORMATION

New Service Call
Place an Order
Meters Needed

Equipment Type Konica Minolta BH 224E	Serial Number EQ0001
Item Number A61H011	Manufacturer Serial # 6790092
Status Active	Active Contract No
Contact Name	Telephone 888-541-3214 X100
Equipment Address	Location

METER INFO

Display 10 records Search

Meter	Date	Value	Type	Billed	Source
BLK	7/23/2018	3526	Service	N	Mobile
BLK	9/20/2017	3526	Actual	N	Phone
BLK	8/20/2017	10	Initial	N	

Please Note: Any prices listed are for demonstration purposes only

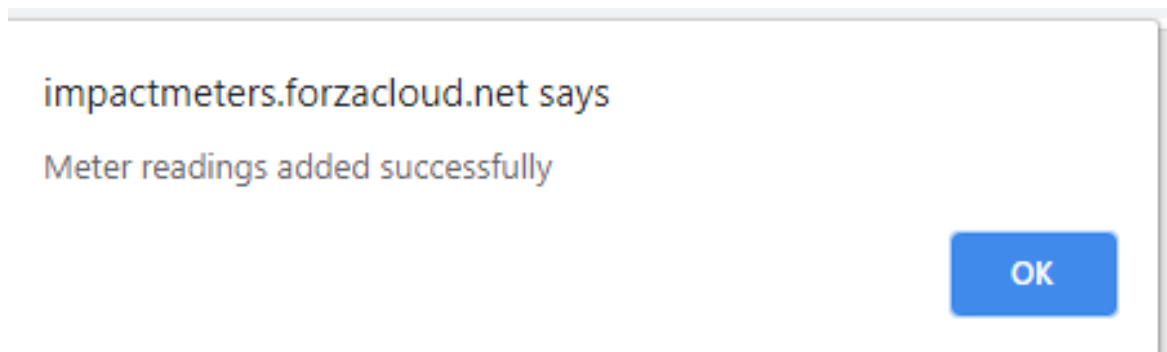


3. The meter entry page will open. Please enter your meters here.

Send your meter readings easy way!  
Please submit your meter readings below.

#	Model	AssetTag	MfrSN	Address	Location	MeterCode	DueDate	Meter Value
1	BH 224E	EQ0001	6790092			BLK	05/01/20	<input type="text" value="25467"/>

4. Once completed, click "OK" to submit the readings. A confirmation will appear.



Please Note: Any prices listed are for demonstration purposes only