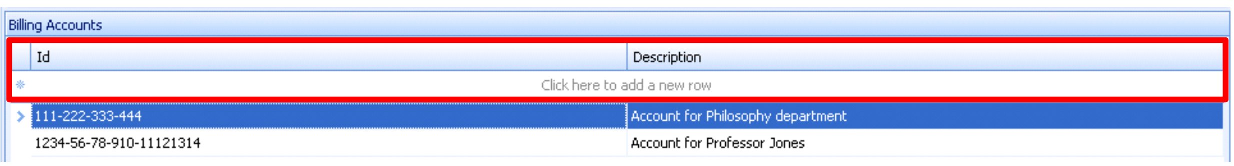
Billing Accounts

https://prometheus.atlas-sys.com/display/aeon/Billing+Accounts

Billing Accounts allows you to record payment for photoduplication orders using faculty, staff, or departmental accounts instead of cash, check, or credit card. Any staff member with access to the Aeon client can create and manage billing accounts; no special permission is needed. This feature is optional, but may be useful if you have many patrons that would benefit from paying via billing accounts.

Adding Billing Accounts

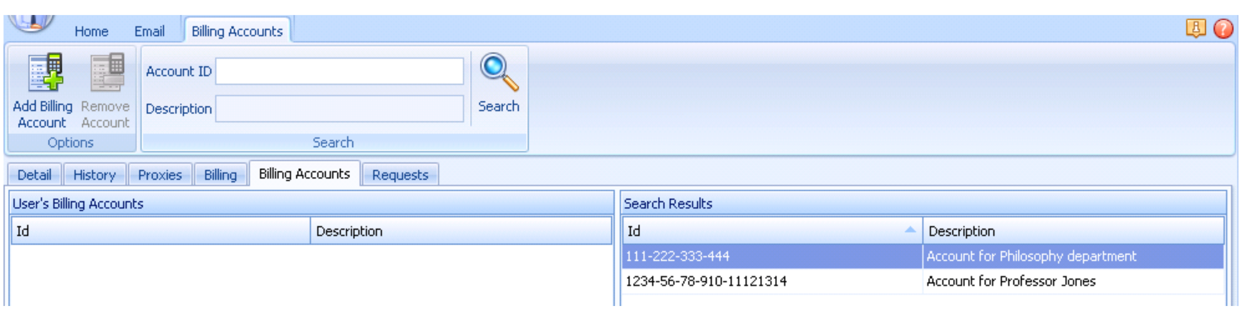
To add a Billing Account to your Aeon system, navigate to the Manage ribbon on your dashboard and click the Billing Accounts button. Enter the account ID (up to 50 characters) and a description. (NOTE: The ID must be a unique number and cannot be edited once it has been created.)



Once a Billing Account has been created, you can associate users with that account. These must be added individually in the user record.

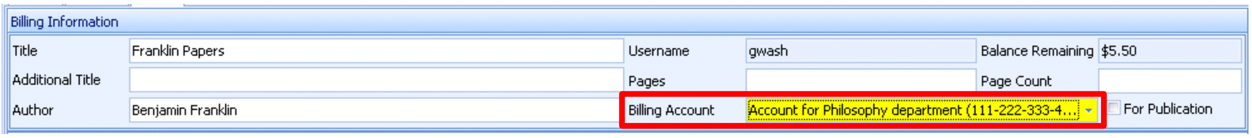
Assigning Billing Accounts to Users

In the user record, click the Billing Accounts tab. Search for accounts using the Search group (leaving the fields blank and clicking the Search button will display all accounts). Select the account you want to add and either click the Add Billing Account button or drag the account to the User's Billing Accounts box to add it. From the Billing Accounts tab you can also remove accounts from a user's record.



Once the account has been associated with a user, you can process photoduplication orders and mark in Aeon that they have been billed to that account. Choose the account in the Billing Account dropdown, save your changes, and record the payment in the Payments/Credits section of the Billing tab.

Recording Payment using Billing Accounts



You can give your web users the option to choose a billing account when they submit their request (if they have an account associated). Similar to an activity request, when a billing account is associated with a user, that user will have an additional field in their web request form that will allow them to choose the billing account from a drop down. See the documentation on the link above for more information about the code needed to make this visible. If you are on Aeon 3.6 or higher, you should already have this code in your pages, but it's always best to double check if you intend to use this feature.

NOTE: Remember that Aeon is not a payment processor. Like processing credit card or other payments, Aeon only serves as a record of payment. You will need to send the payment information for that billing account to whichever office or staff member normally processes these payments.

Bundles

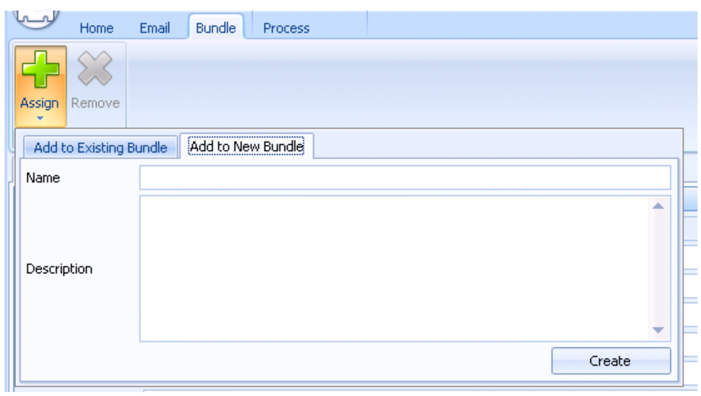
https://prometheus.atlas-sys.com/display/aeon/Assigning+Requests+to+Bundles
https://prometheus.atlas-sys.com/display/aeon/Managing+Bundles

Bundles act like a rubber band for a group of requests that you want to keep together. Putting several requests together in a bundle allows you to track them together, although they may be in different statuses.

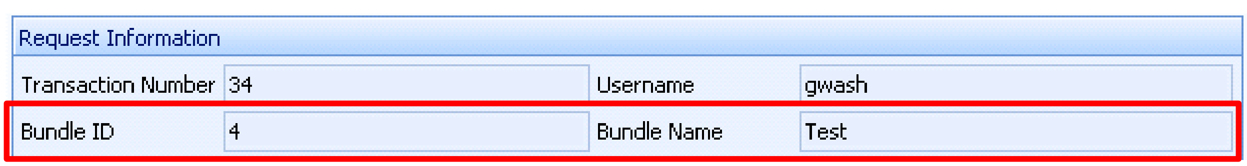
Bundles are useful to organize a large number of requests or orders from one patron or to organize requests within an activity. Bundles add an extra layer of organization to any number or type of requests. Bundles are only visible within the client and will not display to patrons on the web.

Assigning Requests to Bundles

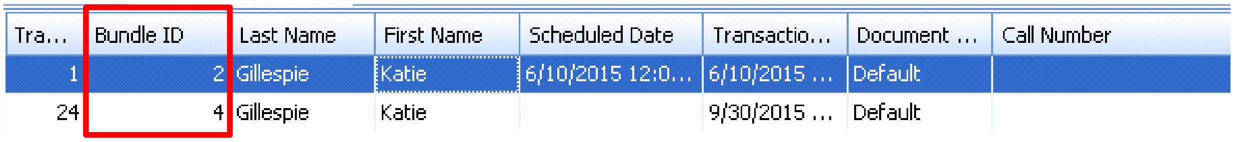
To assign a request to a bundle, open the request and click the Bundle ribbon. In the Assign dropdown, click the "Add to New Bundle" tab and fill in the Name and Description for your bundle. Then click Create.



Once a request is assigned to a bundle, you can see the Bundle ID (assigned by Aeon in numerical order) and the Bundle Name or Description in the Request Information form. To learn more about adding these fields, refer to the Managing Bundles page in the documentation.



You can also see Bundle information in any of the grids, which allows you to easily identify bundled requests or filter by bundle. To learn more about adding these fields, refer to the Managing Bundles page in the documentation.



Managing Bundles

To view all bundles and the requests associated, navigate to the Manage tab from the Aeon dashboard and click the Bundles button. The Manage Bundles window will allow you to see all bundles, search for bundles, and view (and remove) requests association with bundles.

If you leave the search fields blank and click the Search button, all bundles will show in the in the Bundle pane. Or you can limit your search by ID number, Name, or Description.