



Stoneridge Portal

Step-by-Step Client Guide for My Services

Welcome to the Stoneridge Portal

What's new?

We've redesigned the Stoneridge Portal to make it easier than ever to manage your account, get support, and access your services — all in one place.

Key Benefits:

- Self-service tools so you can make updates, payments, and purchases anytime
- A better Support experience with clearer communication and faster case resolution
- Secure payment options — including direct ACH payments in the portal

Quick Start: Where to Find What You Need

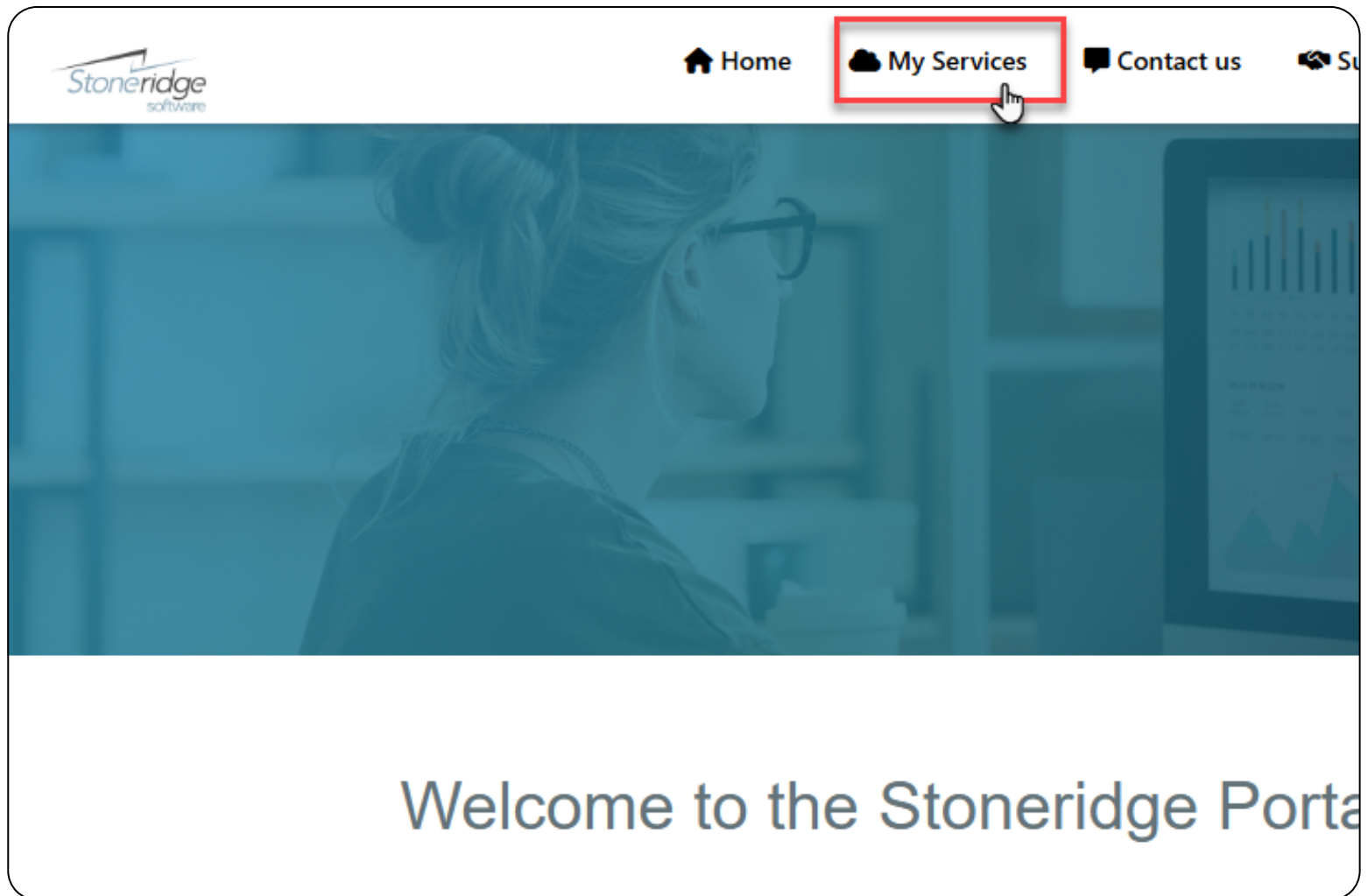
Click a task below to jump straight to the instructions.

Category	Task
My Services	View My Services dashboard
	View and edit your subscriptions
	Purchase a new subscription
	View payment profiles
	View invoices
	Pay an invoice
	Create a payment profile (first-time payment)
	Paying multiple invoices

My Services

View My Services dashboard

- 1 On the Stoneridge Portal home page, click **My Services** in the top menu



My Services

View my services dashboard

2 When you land on the My Services Dashboard, you'll see:

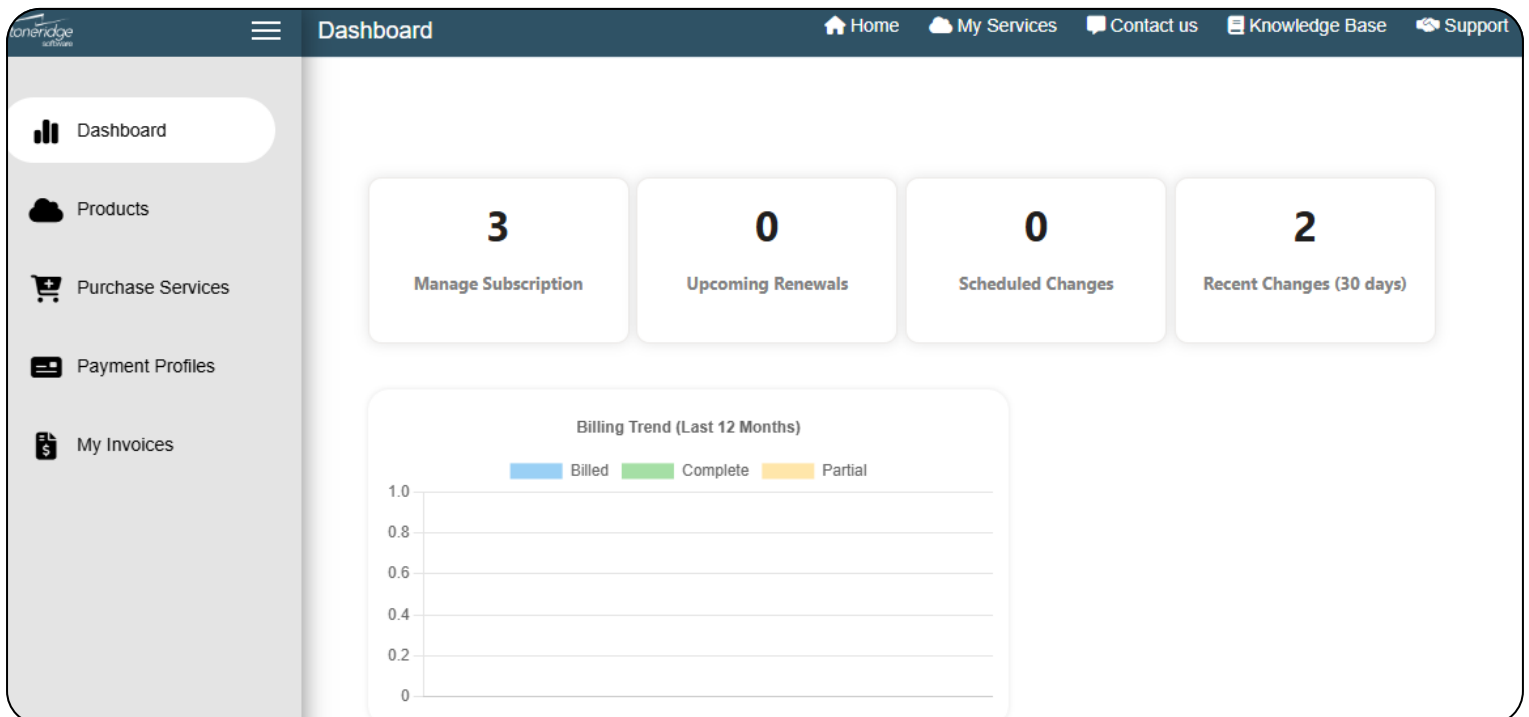
- **Manage Subscriptions** – subscriptions you can edit
- **Upcoming Renewals** – subscriptions due for renewal soon
- **Scheduled Changes** – pending updates already submitted
- **Recent Changes** – adjustments made in the last 30 days



Quick Note: Clicking any of the items above will take you directly to the relevant list of products

At the bottom, a 12-month billing trend graph displays invoice activity for your organization:

- **Billed** – invoices issued and awaiting payment
- **Complete** – fully paid
- **Partial** – partially paid or processed



My Services

View and edit subscriptions

1

Click **Products** in the left menu

Note: Pricing shown here might not reflect your discounts or promotions

The screenshot shows the 'My Services' interface. On the left, the 'Products' menu item is highlighted. The main area displays a table of subscriptions with columns: Product Name, Provisioned Q..., Next Rene..., Changes, and Action. The table lists three items: Office 365 E5, Power Apps Premium, and another Power Apps Premium. Callouts indicate that filters for Type, Term, and Billing Contracts are available on the left, and that the 'Changes' column shows the latest updates with an edit button in the 'Action' column.

Product Name	Provisioned Q...	Next Rene...	Changes	Action
Office 365 E5	25		Last changed on 08/11/2025	[Edit]
Power Apps Premium	0			[Add]
Power Apps Premium	5	in 345 days	Last changed on 08/11/2025	[Edit]

You can filter by **Product Name**, **Provisioned Quantity**, and **Next Renewal**

Latest changes are shown under **Changes** and an edit button under **Action**



Quick Tip: Use filters to narrow down by **type**, **term**, or **billing contract**

The screenshot shows the 'My Services' interface with the filter section on the left highlighted by a red box. The filter section includes checkboxes for Type (Usage-Based, Subscription, One Time Purchases), Term (Monthly, Yearly, Quarterly, Triennial), and Billing Contracts (All, ContosoSSI Monthly). The main table shows the same subscription data as the previous screenshot. A callout points to the filter checkboxes, stating that all are selected by default.

Upon opening the Products page, **all checkboxes** are selected to show all subscriptions attributed to your organization



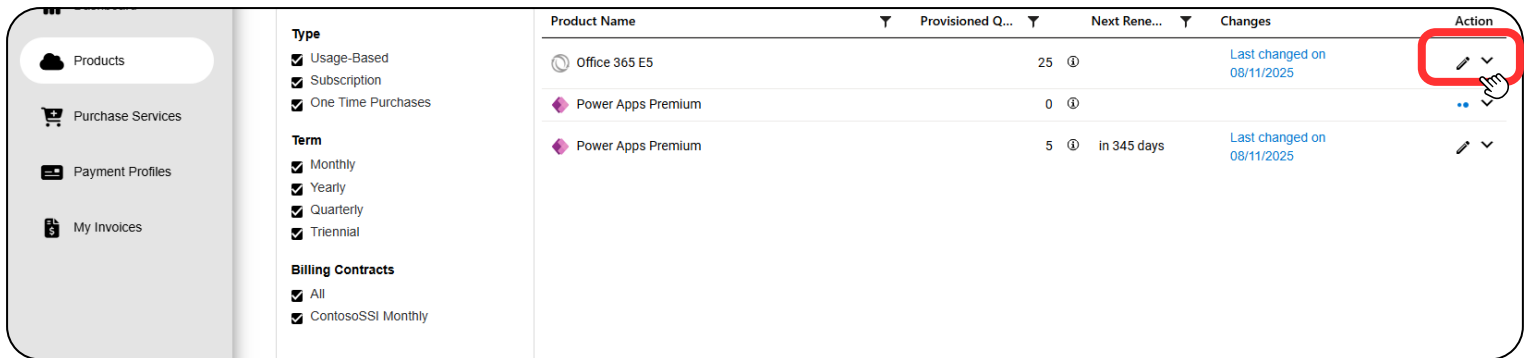
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My Services

View and edit subscriptions

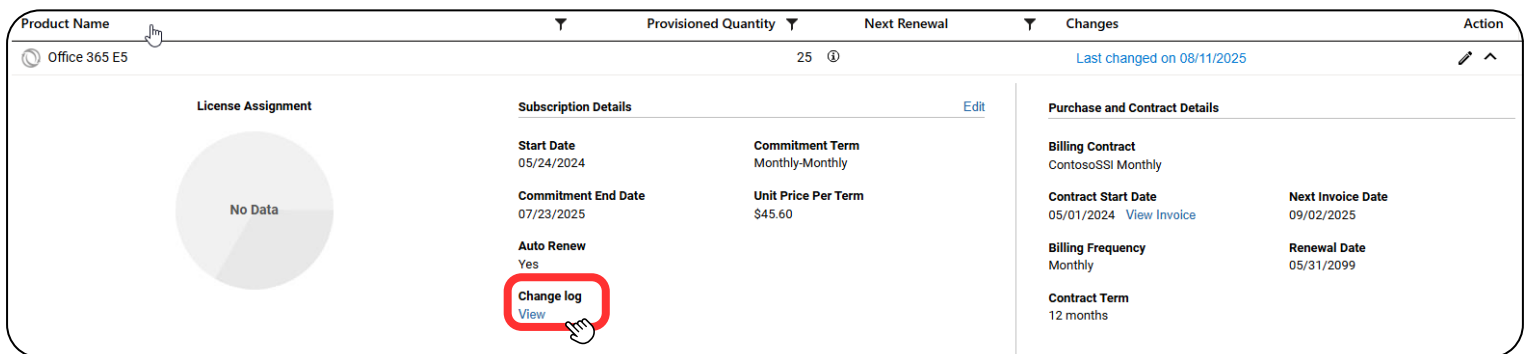
2 Click the **dropdown** on a subscription record to view:

- **License Assignments** (if applicable)
- **Azure Usage Data** (for Azure-based subscriptions)
- **Change Log** – includes details like start date, quantity, and order source



Type	Product Name	Provisioned Q...	Next Rene...	Changes	Action
☒ Usage-Based ☒ Subscription ☒ One Time Purchases	Office 365 E5	25 ⓘ		Last changed on 08/11/2025	
Term ☒ Monthly ☒ Yearly ☒ Quarterly ☒ Triennial	Power Apps Premium	0 ⓘ			
Billing Contracts ☒ All ☒ ContosoSSI Monthly	Power Apps Premium	5 ⓘ	in 345 days	Last changed on 08/11/2025	

Clicking **View** under the **Change Log** lets you see a full history of changes made to the subscription. The log is organized into seven filterable columns, including **Name**, **Start Date**, **Quantity**, **Ordered By**, **Order Reference**, **Order Source**, and **Status**.



Product Name	Provisioned Quantity	Next Renewal	Changes	Action
Office 365 E5	25 ⓘ		Last changed on 08/11/2025	
License Assignment No Data				
Subscription Details Edit				
Start Date 05/24/2024		Commitment Term Monthly-Monthly		
Commitment End Date 07/23/2025		Unit Price Per Term \$45.60		
Auto Renew Yes		Change log View		
Purchase and Contract Details				
Billing Contract ContosoSSI Monthly				
Contract Start Date 05/01/2024 View Invoice		Next Invoice Date 09/02/2025		
Billing Frequency Monthly		Renewal Date 05/31/2099		
Contract Term 12 months				



My Services

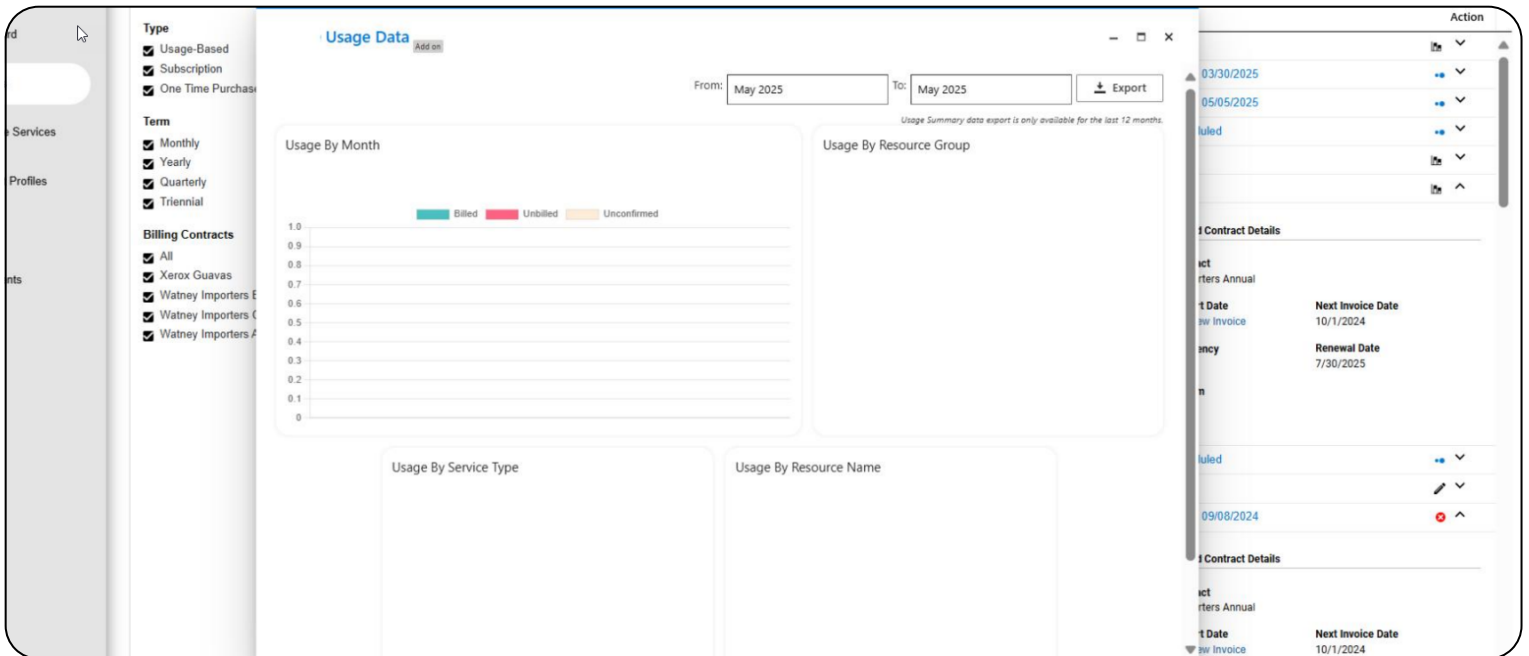
View and edit subscriptions

Change Log view

Office 365 E5

Name	Effecti...	Quantity	Order By	Order Reference	Order Source	Status
Update Quantity	08/11/2025	5	Jack Roehrich (jack.roehrich@stone...		Portal	✓
Update Quantity	07/29/2025	19	Jack Roehrich (jack.roehrich@stone...		Portal	✓
Create 'Office 365 E5'	05/23/2024	1	System	63bec038ff99	Provider	N/A

If applicable, you'll see license (or seat) assignment details on the left side of the subscription record. For **Azure-based subscriptions**, you can also open a pop-up window to view usage data.



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My Services

View and edit subscriptions

- 3 To adjust quantity:
1. Click **Edit** or the **pencil icon** on the subscription line
 2. Increase or decrease quantity
 3. Click **Save**

The screenshot shows a modal window for editing a subscription. The modal is divided into two main sections: 'Purchase and Contract Details' on the left and 'Changes' on the right. The 'Changes' section is highlighted with a red border and contains the following elements:

- A 'Adjust Quantity Count by' input field with a value of 0.
- A 'Resulting Quantity' field showing 25.
- 'Cancel' and 'Save' buttons at the bottom right.

The 'Purchase and Contract Details' section on the left includes fields for 'Commitment Term' (Monthly-Monthly), 'Unit Price Per Term' (\$45.60), 'Billing Contract' (ContosoSSI Monthly), 'Contract Start Date' (05/01/2024), 'Next Invoice Date' (09/02/2025), 'Billing Frequency' (Monthly), 'Renewal Date' (05/31/2099), and 'Contract Term' (12 months). There is also an 'Edit' link and a 'View Invoice' link.

4. A pop-up will remind you of Microsoft's 7-day license reduction policy
5. Select **Yes** to confirm the change

The screenshot shows a 'CONFIRMATION' pop-up dialog. The dialog has a title bar with a close button (X). The main text reads: 'Please note, license quantities can only be canceled or reduced within 7 days of placing the order. Please reach out to our Licensing Team (licensingteam@stoneridgesoftware.com) with any licensing-related questions. Do you want to proceed?'. Below the text are two buttons: 'Yes' (highlighted in blue) and 'No'.



Quick Note: You can only reduce subscription quantities if the subscription was created within the last 7 days.



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My Services

Purchase a new subscription

1

Go to **Purchase Services** in the left menu and choose your organization's billing contract from the dropdown

Product ID	Commitment Term	Manufacturer
SSICFQ7TTC0LH2H-0002	Monthly-Monthly	Microsoft
SSICFQ7TTC0LF8S-0002	Monthly-Monthly	Microsoft
SSICFQ7TTC0LF8S-0002	Annual	Microsoft
SSICFQ7TTC0LH2H-0002	Annual	Microsoft
SSICFQ7TTC0LH2H-0002	Annual-Monthly	Microsoft



Quick Tip: Browse the catalog (filterable by: **Name, Product ID, Commitment Term, Manufacturer, Unit Price, and Action - always "Buy"**)

Subscriptions are categorized by a Commitment-Billing format:

- **Annual-Annual** – One-year commitment, billed once upfront
- **Annual-Monthly** – One-year commitment, billed monthly
- **Monthly-Monthly** – Month-to-month commitment, billed monthly

2

Click **Buy** next to the subscription you want

Product ID	Commitment Term	Manufacturer	Unit Price	Action
SSICFQ7TTC0LH2H-0002	Monthly-Monthly	Microsoft	\$24.00	Buy
SSICFQ7TTC0LF8S-0002	Monthly-Monthly	Microsoft	\$45.60	Buy
SSICFQ7TTC0LF8S-0002	Annual	Microsoft	\$456.00	Buy
SSICFQ7TTC0LH2H-0002	Annual	Microsoft	\$240.00	Buy
SSICFQ7TTC0LH2H-0002	Annual-Monthly	Microsoft	\$252.00	Buy



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My Services

Purchase a new subscription

3

Fill out the **Add Product** form:

- Required: Quantity and Effective Start Date
- Optional: Reference or Description for your internal records

The 'Add Product' form is a web-based interface for adding a new subscription. It contains several input fields and buttons. The fields are organized into three columns. The first column contains 'Customer' (Contoso SSI (Work 365)), 'Commitment Term' (Annual), 'Quantity' (0), and 'Ordered By' (Jack Roehrich (jack.roehrich@stoneridgeso...)). The second column contains 'Billing Contract' (ContosoSSI Monthly), 'Currency' (US Dollar), 'Effective Start Date' (month/day/year), and 'Order Date' (8/8/2025). The third column contains 'Product' (Power Apps Premium), 'Unit Price' (\$240.00), and 'Reference'. There is also a large 'Description' text area at the bottom. At the bottom right, there are 'Save' and 'Cancel' buttons.



Quick Note: Our Licensing Team will ensure your subscription aligns with your existing terms

4

- Click **Save** to complete the order and a confirmation pop-up will appear, letting you know our Licensing Team has received your request.

The 'Success' pop-up is a small window with a title bar that says 'Success' and a close button (X). The main text inside says 'Order placed. A licensing specialist will confirm your order within 1 business day.' At the bottom right, there is a 'Close' button.

Once processed, your new subscription will appear:
On your **Products** page
On your **next invoice**

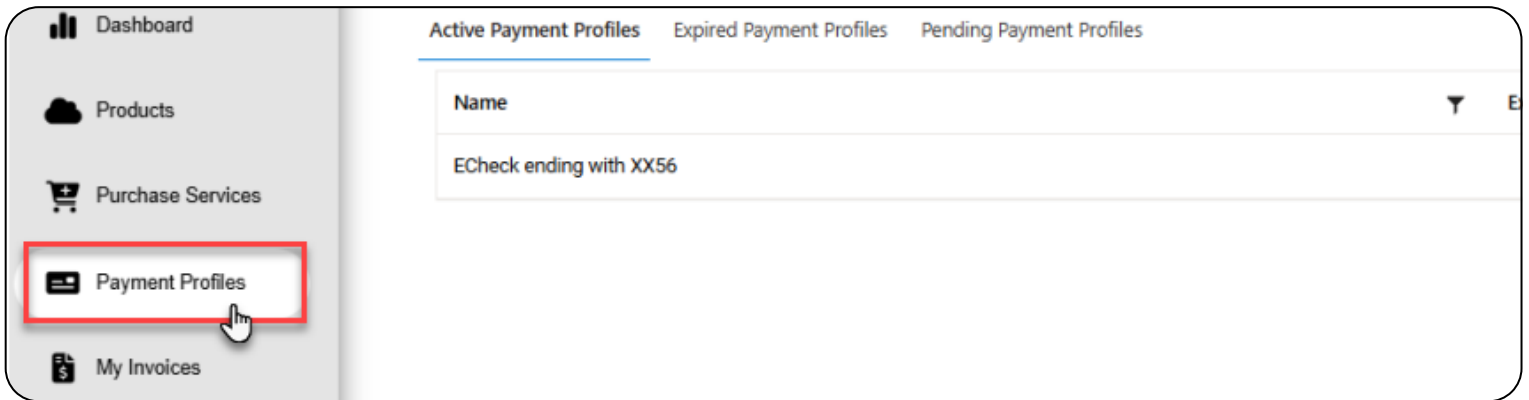


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My Services

View payment profiles

- 1 Click **Payment Profiles** in the left menu to see:
 - **Active** – available for use
 - **Expired** – no longer valid (e.g. expired cards)
 - **Pending** – awaiting validation (e.g. newly created profiles)



Quick Note: At this time, only E-Checks are accepted for payment via the portal.



My Services

View my invoices

1 Click **My Invoices** in the left menu

Products

Purchase Services

Payment Profiles

My Invoices

Important: Payments made outside of this portal (e.g. Check, Credit, ACH, etc.) may not be immediately reflected in your invoice status. Please allow time for these payments to be processed.

Open Invoices

	Invoice Number	Billing Date	Due Date	Total Amount
☐	INV-235693-D9X8T5	8/2/2025	8/31/2025	\$967.86
☐	INV-235694-P4G4R4	7/2/2025	7/31/2025	\$49.00

2 You'll see your Open Invoices by default

- Columns include **Invoice Number**, **Billing Date**, **Due Date**, and **Total**

3 Use the dropdown at the top-left to switch between:

- Open Invoices**
- Payment Pending**
- Paid Invoices**

Open Invoices

Payment Pending

Paid Invoices



Quick Tip: You can **download** or **pay** each invoice using buttons on the right-hand side.

	Invoice Number	Billing Date	Due Date	Total Amount	
☐	INV-235693-D9X8T5	8/2/2025	8/31/2025	\$967.86	Download Pay Now
☐	INV-235694-P4G4R4	7/2/2025	7/31/2025	\$49.00	Download Pay Now



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My Services

Pay an invoice

1 Click **Pay Now** next to the invoice

	Invoice Number	Billing Date	Due Date	Total Amount	
☐	INV-235693-D9X8T5	8/2/2025	8/31/2025	\$967.86	Download Pay Now
☐	INV-235694-P4G4R4	7/2/2025	7/31/2025	\$49.00	Download Pay Now

- 2 Choose whether to:
- **Pay the full amount**
 - **Enter a custom amount**
 - **Apply existing credits** (if available)

 **Quick Note:** If you have available credits with Stoneridge Software, you can switch the toggle to **Apply Credits** (if applicable) and select the dollar amount of your credit to apply toward the invoice.

Select Payment Option

☐ Pay invoice(s)

☒ Apply credits (if applicable)

Continue

Apply Credits

Continue

3 Select a **Payment Profile** or create a new one

Pay Invoice

Use Existing Payment Profile

Select Payment Profile

Or

+ Create New Payment Profile

Continue



My Services

Pay an invoice

4 Review your info and click **Confirm and Pay**

←

×

Confirm Payment

Invoice: INV-235695-X7R9G3 \$45.60

Total Payment: \$45.60

Payment Profile: ECheck ending with XX56

Confirm and Pay

Payments powered by GoCardless. GoCardless Inc.'s (a Delaware Corporation, NMLS ID 2123932) payment service is provided by (i) a program sponsored by Community Federal Savings Bank ("CFSB"), or (ii) GoCardless Inc., a FinCEN registered money services business, registration number 31000261158426. Where your payment is processed by GoCardless Inc., it serves as agent to receive payment on Stoneridge Software's behalf and your payment to GoCardless Inc. constitutes payment to Stoneridge Software.

GoCardless and CFSB use personal data as described in these [privacy notices](#)

5 You'll receive a success message, and the invoice will move to **Payment Pending**

←

Payment Successful

Your payment for invoice **INV-235695-X7R9G3** was processed successfully.

Close



Quick Note: It will be marked as **Paid** after processing (usually within 3 business days)

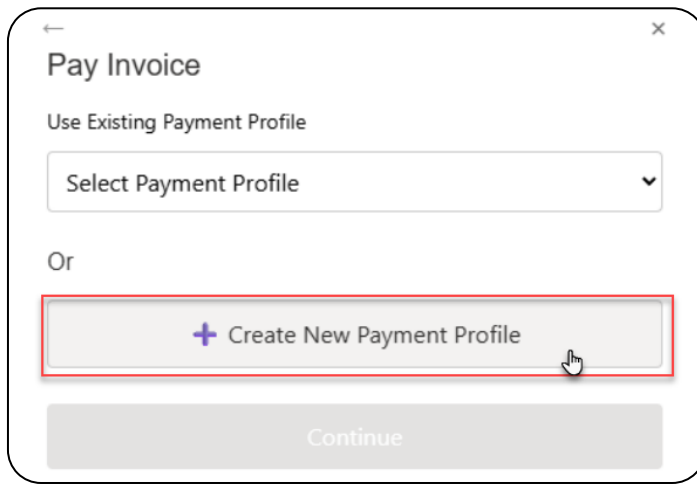


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My Services

Create a payment profile (first-time payment)

1 On the payment screen, select **Create New Payment Profile**

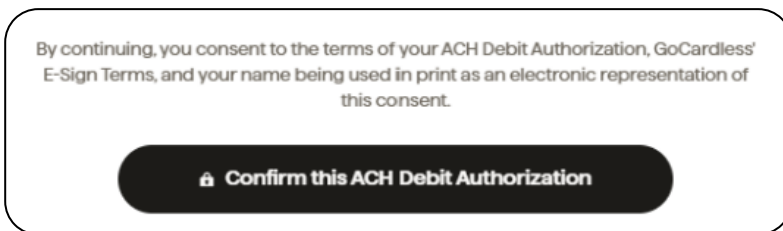


The screenshot shows a mobile app interface for 'Pay Invoice'. At the top, there's a title bar with a back arrow and a close 'x' button. Below the title, it says 'Use Existing Payment Profile' followed by a dropdown menu labeled 'Select Payment Profile'. Below this, it says 'Or'. Then, there's a button with a purple plus icon and the text '+ Create New Payment Profile', which is highlighted with a red rectangular box. At the bottom, there's a grey 'Continue' button.

2 Fill in:

- Country, name, email, billing address, currency
- Bank details: Account holder name, routing number, account number, account type

3 Confirm your info and **submit**



The screenshot shows a confirmation screen with a text block that reads: 'By continuing, you consent to the terms of your ACH Debit Authorization, GoCardless' E-Sign Terms, and your name being used in print as an electronic representation of this consent.' Below the text is a large black button with white text that says 'Confirm this ACH Debit Authorization'.



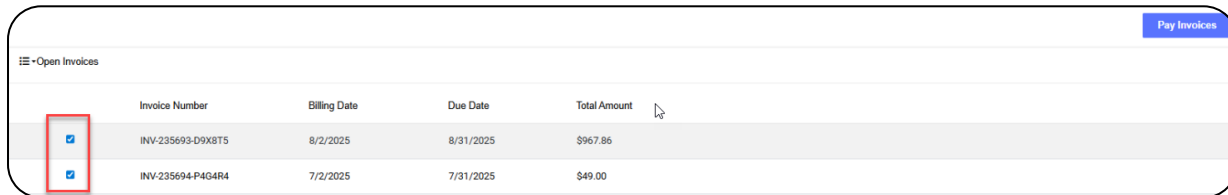
Quick Note: Your new profile will appear as an **E-Check option** and can be used for future payments.



My Services

Paying multiple invoices

1 Select checkboxes next to the invoices you want to pay



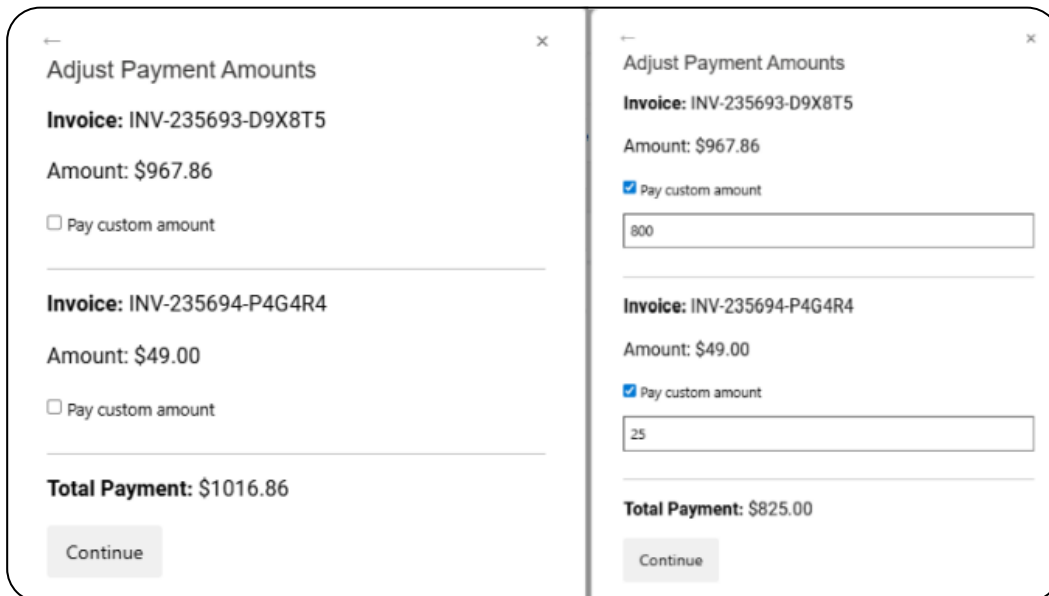
The screenshot shows a table titled "Open Invoices" with a "Pay Invoices" button in the top right corner. The table has five columns: Invoice Number, Billing Date, Due Date, and Total Amount. Two rows are visible, each with a checked checkbox in the first column. The first row is for invoice INV-235693-D9X8T5 with a total amount of \$967.86. The second row is for invoice INV-235694-P4G4R4 with a total amount of \$49.00.

	Invoice Number	Billing Date	Due Date	Total Amount
☒	INV-235693-D9X8T5	8/2/2025	8/31/2025	\$967.86
☒	INV-235694-P4G4R4	7/2/2025	7/31/2025	\$49.00

2 Click **Pay Invoices**

3 Choose to:

- **Pay the full amounts**
- **Enter a custom amount per invoice**
- **Apply credits (if available)**



The left screenshot shows the "Adjust Payment Amounts" dialog box for two invoices. The first invoice is INV-235693-D9X8T5 with an amount of \$967.86. The second invoice is INV-235694-P4G4R4 with an amount of \$49.00. The "Pay custom amount" checkbox is unchecked for both. The total payment is \$1016.86. The right screenshot shows the same dialog box but with the "Pay custom amount" checkbox checked for both invoices. The first invoice has a custom amount of 800 entered, and the second has a custom amount of 25 entered. The total payment is now \$825.00.

Adjust Payment Amounts

Invoice: INV-235693-D9X8T5

Amount: \$967.86

☐ Pay custom amount

Invoice: INV-235694-P4G4R4

Amount: \$49.00

☐ Pay custom amount

Total Payment: \$1016.86

Continue

Adjust Payment Amounts

Invoice: INV-235693-D9X8T5

Amount: \$967.86

☒ Pay custom amount

800

Invoice: INV-235694-P4G4R4

Amount: \$49.00

☒ Pay custom amount

25

Total Payment: \$825.00

Continue



My Services

Paying multiple invoices

4 Select a **Payment Profile**

Pay Invoice

Use Existing Payment Profile

ECheck ending with XX56

Or

+ Create New Payment Profile

Continue

Confirm Payment

Invoice: INV-235693-D9X8T5 \$967.86

Invoice: INV-235694-P4G4R4 \$49.00

Total Payment: \$1016.86

Payment Profile: ECheck ending with XX56

Confirm and Pay

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5 Click **Confirm and Pay**

Pay Invoice

Use Existing Payment Profile

ECheck ending with XX56

Or

+ Create New Payment Profile

Continue

Confirm Payment

Invoice: INV-235693-D9X8T5 \$967.86

Invoice: INV-235694-P4G4R4 \$49.00

Total Payment: \$1016.86

Payment Profile: ECheck ending with XX56

Confirm and Pay

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Quick Note: Paid invoices will first appear under **Payment Pending**, then move to **Paid** once processed.

Payment Pending					
Name	Billing Date	Due Date	Total Amount		
ContosoSSI Monthly - Monthly - August 2025 (30-Jul-2025 16:15:41)	8/2/2025	8/31/2025	\$967.86	Download	
ContosoSSI Monthly - Monthly - July 2025 (30-Jul-2025 16:17:10)	7/2/2025	7/31/2025	\$49.00	Download	



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