

How to Create a Basic QuickView+ Report

1

Your **Account Number** will automatically display

2

Select **Display** to view the report

3

Enter the **Date Range** by selecting a specific Begin Date and End Date or an individual month

4

Select **Summary-Account by Client by User by Day** for the best breakdown of usage by each of those levels

5

Select **Separate Included/Excluded Charges**

6

Select **Hours-Minutes-Seconds**

7

Leave the **Apply Special Pricing**, **Calculate Tax**, and **Target Options** boxes unchecked

8

Click **Submit** to view the report

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QuickView+

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DOCUMENTATION WHAT'S NEW FEEDBACK MY ACCOUNT

Create Report:

To begin, select an account or account group from the list below and select a delivery method.

Enter Account: **1** BERENS STERNFELS STRUBLE & YOUNG (1001234567)

Select Delivery Method: Display **2**

Products: All Products

Content Family: All Content Families

Select Date Range or Month: (Customized Reporting: October 01, 2019 - October 18, 2020 Monthly Reports: September 2020 - August 2018)

Select Begin Date: September 01, 2020 **3** Select Month: No Month Selected (Use Date Range)

Select End Date: September 30, 2020

Select Report Format: Summary-Account by Client by User by Day **4**

Select Special Offer Charges to Display: Separate Included/Excluded Charges **5**

Time Format: Hours-Minutes-Seconds **6**

Apply Special Pricing: Yes

Calculate Tax: Yes **7**

Target Options: Yes

Include sessions marked as non-chargeable: Yes

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