

Self-Service Portal Customer User Guide (Legal Product Customers)

The self-service portal enables users on their own to effectively manage billing and payment processes, and user management tasks, including making full or partial payments, storing payment information, adding and removing users, designating which users have administrative access, and providing access to products to which your firm or organization subscribes.

This guide provides step-by-step instructions to perform specific tasks. The illustrations and instructions are current as of March 2023. The self-service portal is continually updated, including new feature releases and processes. We will maintain this guide to reflect any significant changes.

To access the portal, use the following URL: <https://www.thomsonreuters.com/en-us/account/sign-in>.

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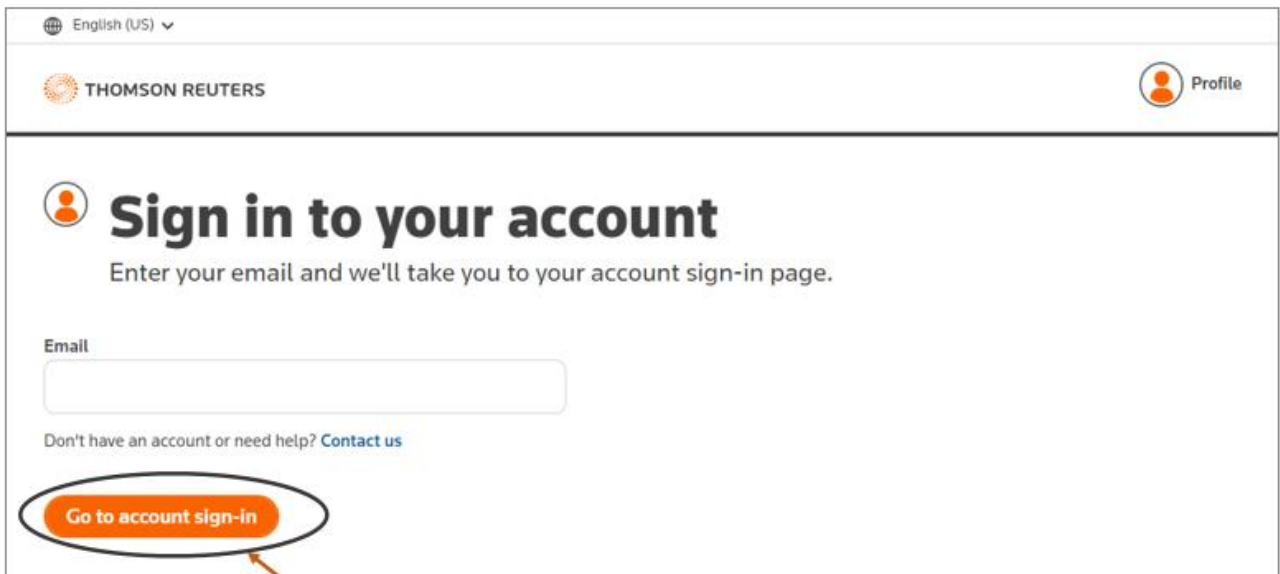
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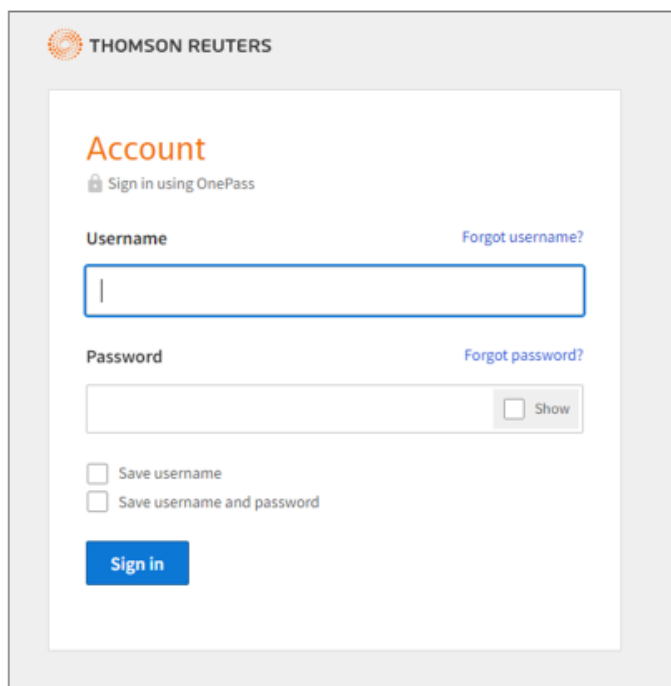
SIGN-IN TO SELF-SERVICE PORTAL

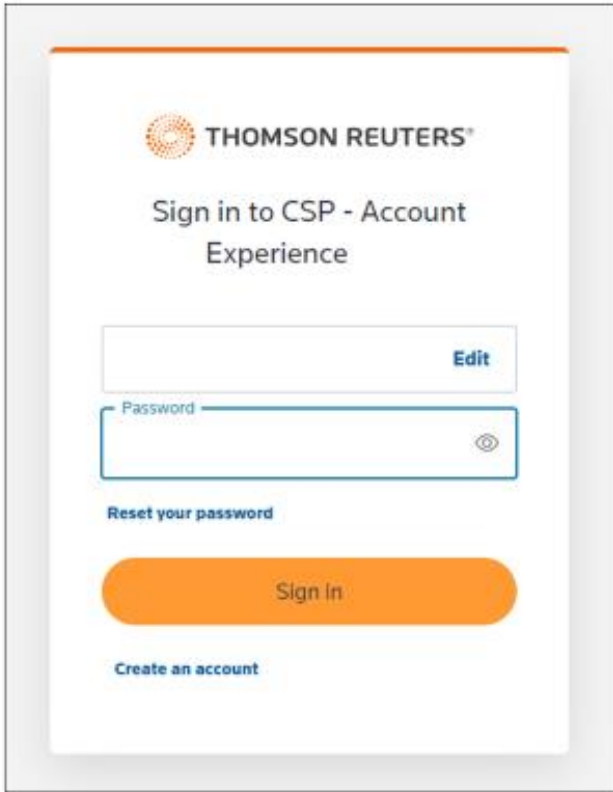
Sign-in

To sign-in to the self-service portal for Thomson Reuters' products, enter the email address used to create your account, then click **Go to account sign-in**.

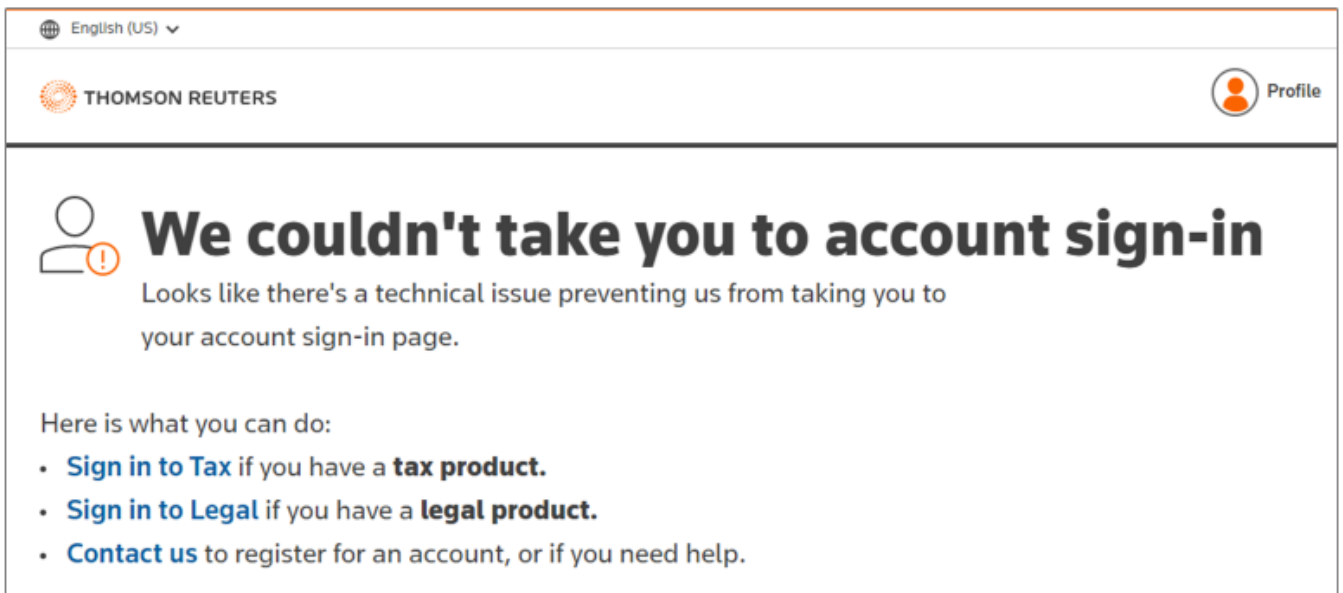


Next, sign-in to your account as prompted. Note, legal product customers (eDiscovery Point, Firm Central, Practical Law, Westlaw) will login using their OnePass account (similar to the first image below), while tax product customers (Checkpoint, CS Professional Suite, ONESOURCE, Onvio) will login using their CIAM account (similar to the second image below).





If your email address is not recognized, you will see a window similar to the below. To sign-in from here, click on the relevant link (**Sign in to Tax / Sign in to Legal**). If you do not have an account, click the **Contact us** link.



Terms and Conditions

The first time you login to the self-service portal, a Terms and conditions popup window will appear. Click **I agree** to continue to the platform.

Terms and conditions

By registering for an Account, Subscriber agrees/agreed to receive one or more OnePass passwords. Subscriber is solely responsible for maintaining the security of all OnePass passwords and for any access to information obtained on an Account through Subscriber's OnePass by Subscriber's personnel, whether or not Subscriber has knowledge of or authorizes such access. By accessing an Account via OnePass, the accessing party certifies that they are either the Subscriber or an authorized representative of Subscriber with express authority of Subscriber to have access to information and data contained on an Account; including, but not limited to, billing and account information, Westlaw passwords, etc. Subscriber and/or authorized representative(s) with Subscriber's express authority are responsible for contacting West for additional OnePass passwords or notifying West when passwords should be revoked. West reserves the right to terminate OnePass passwords. ONEPASS AND AN ACCOUNT ARE PROVIDED "AS IS," WITHOUT WARRANTY OF ANY KIND, EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, WARRANTIES OF PERFORMANCE, MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, ACCURACY, OMISSIONS, COMPLETENESS, CURRENTNESS AND DELAYS. Terms and conditions for an Account do not change or modify Subscriber's Order Form(s), Subscriber Agreement(s), Schedule(s) or other addendum.

I agree Sign out

Occasionally, you may need to agree to an updated Terms and conditions on login.

Updated terms and conditions

By registering for an **Account**, you certify that you are either the Subscriber or an authorized representative with the express authority of the Subscriber to access the information and data contained at the **Account**; including, but not limited to, billing and account information. Subscriber acknowledge responsibility for maintaining the security of any passwords used to access the Account, and for adhering to all recommended security settings, and Subscriber shall be fully liable for any access to the Account as a result of Subscriber's failure to implement any recommended security settings. Subscriber also acknowledges responsibility for all access to information obtained, modified or deleted through the **Account** by Subscriber's personnel or representatives, whether or not Subscriber has knowledge of or has authorized such actions. **ACCOUNT AND ANY SERVICES RECEIVED THROUGH THE ACCOUNT ARE PROVIDED "AS IS," WITHOUT WARRANTY OF ANY KIND, EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, WARRANTIES OF PERFORMANCE, MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, ACCURACY, OMISSIONS, COMPLETENESS, CURRENTNESS AND DELAYS.** Thomson Reuters reserves the right to terminate Subscriber's access to the **Account** at any time and without notice. These Account Terms and Conditions do not modify Subscriber's Order Form(s), Agreement(s) for products and/or services, Schedule(s) or any other Thomson Reuters agreement.

I agree
Sign out

BILLING & PAYMENTS

View Balances and Invoices

List of Invoices and Credits (Open)

To view a list of open invoices (see first image below) and credits (see second image below), navigate to the **Billing** tab and click the **Open** invoices tab.

The screenshot shows the Billing portal interface. At the top, there is a navigation bar with tabs: **Billing** (highlighted with an orange arrow), User access, Orders, Subscriptions, Reports, and Support. An account number is displayed in the top right corner.

The main content area is titled **Billing** and contains three cards:

- Total due (USD)**: \$44,449.62. Includes a past due amount of \$34,429.32. Buttons for "Pay total due" and "Pay past due" are present.
- Autopay**: Set up autopay and never miss a due date. Button for "Set up autopay".
- Quick links**: Manage payment methods, Manage e-billing contacts, and Payment history.

Below the cards, there are two tabs: **Open** (highlighted with an orange arrow) and **Paid invoices**.

The **Open** tab displays "Invoices and credits" with a help icon and the text "Where is my Invoice PDF?". An "Export open invoice list to file" button is in the top right of the table area.

Invoice	Title	Invoice date	Due by	Status	Amount (USD)	Actions
<input type="checkbox"/> 1400463026	WO GW sm balance	Apr 23, 2022	Apr 23, 2022	ⓘ Past due	\$0.01	⋮ Actions
<input type="checkbox"/> 0846393500	Subscription	May 01, 2022	Jun 03, 2022	ⓘ Past due	\$100.70	⋮ Actions
<input type="checkbox"/> 0846393501	Subscription	May 02, 2022	May 11, 2022	ⓘ Past due	\$53.57	⋮ Actions
<input type="checkbox"/> 0846390794	West information Charges	May 03, 2022	May 31, 2022	ⓘ Past due	\$9,861.00	⋮ Actions

Open

Paid invoices

Export open invoice list to file

Invoices and credits

Invoice	Title	Invoice date	Due by	Status	Amount (USD)	
<input type="checkbox"/> 1202525123	Credit	Oct 12, 2020	-	Open	-\$89.71	Actions
<input type="checkbox"/> 1202435671	Credit	Oct 14, 2020	-	Open	-\$89.71	Actions
<input type="checkbox"/> 0844389694	Credit	Sep 12, 2021	-	Open	-\$10.00	Actions
<input type="checkbox"/> 1300221263	Credit	Sep 13, 2021	-	Open	-\$34.75	Actions
<input type="checkbox"/> 1300221264	Credit	Sep 13, 2021	-	Open	-\$5.78	Actions
<input type="checkbox"/> 6144480869	Credit	Oct 27, 2021	-	Open	-\$25.92	Actions
<input type="checkbox"/> 6144480868	Credit	Oct 27, 2021	-	Open	-\$25.88	Actions
<input type="checkbox"/> 0845124537	Credit	Jan 24, 2022	-	Open	-\$195.67	Actions
<input type="checkbox"/> 0845459756	Credit	Jan 24, 2022	-	Open	-\$1,533.94	Actions
<input type="checkbox"/> 0844389694	Partial Balance	Jun 29, 2021	Oct 20, 2021	ⓘ Past due	\$37.90 Balance remaining	Actions

Viewing 1 - 10

⏪
Previous

1

2

3

Next
⏩

Rows per page 10

List of Invoices (Paid)

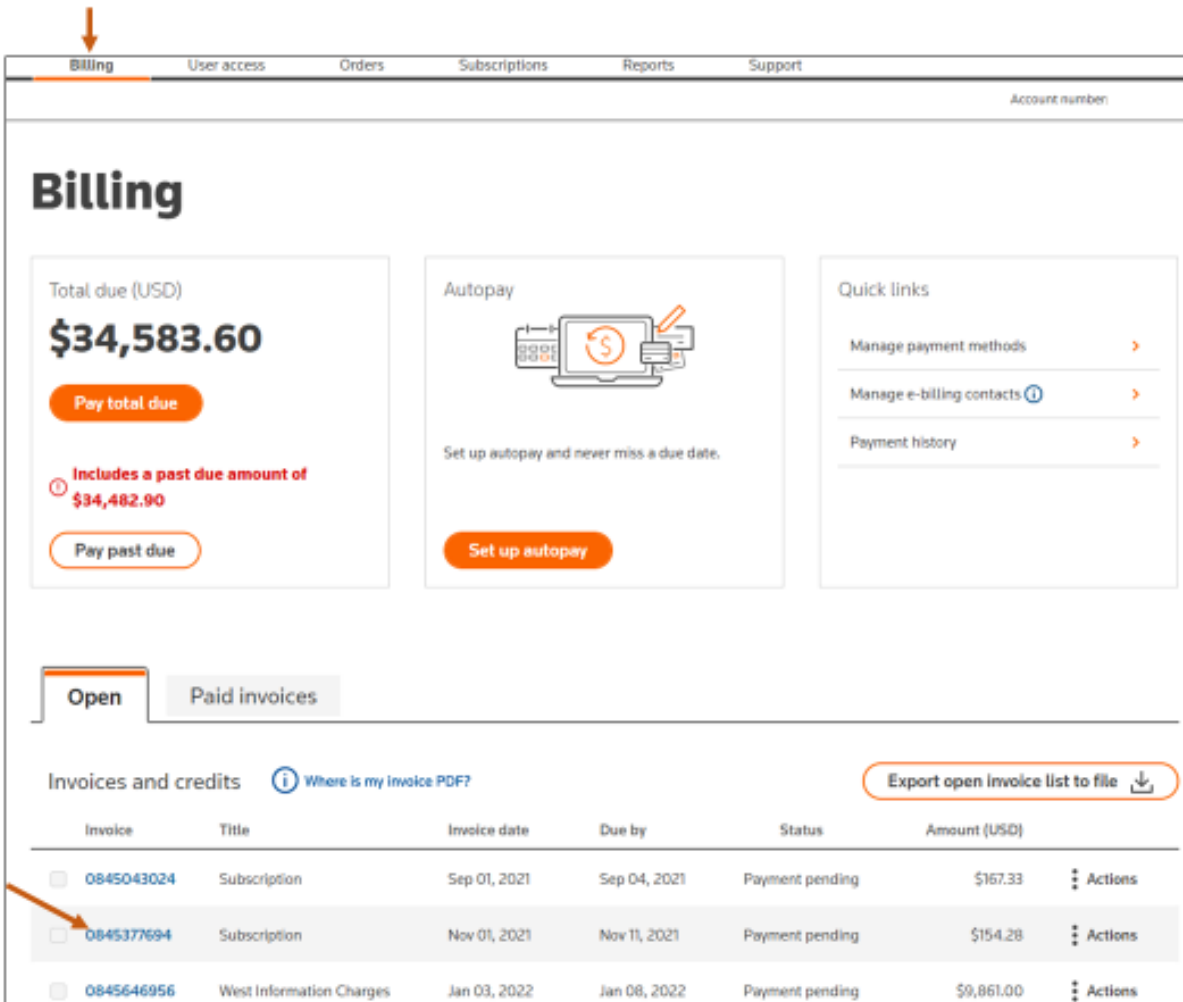
To view a list of paid invoices, navigate to the **Billing** tab and click the **Paid invoices** tab.

The screenshot shows the Thomson Reuters self-service portal interface. At the top, there is a navigation bar with tabs: **Billing** (selected), User access, Orders, Reports, and Support. An arrow points to the **Billing** tab. Below the navigation bar, the main content area is titled **Billing**. It contains three main sections: a status message 'Your account is up to date' with 'No payment due' and an illustration of a document with a checkmark; an 'Autopay' section with an illustration of a laptop and a credit card, and a 'Set up autopay' button; and a 'Quick links' section with three links: 'Manage payment methods', 'Manage e-billing contacts', and 'Payment history', each with a right-pointing arrow. Below these sections, there are two tabs: 'Open' and 'Paid invoices'. An arrow points to the 'Paid invoices' tab. Under the 'Paid invoices' tab, there is a table of invoices and an 'Export paid invoice list to file' button with a download icon. The table has columns for Invoice, Title, Invoice date, Status, and Amount (USD). It lists three paid invoices.

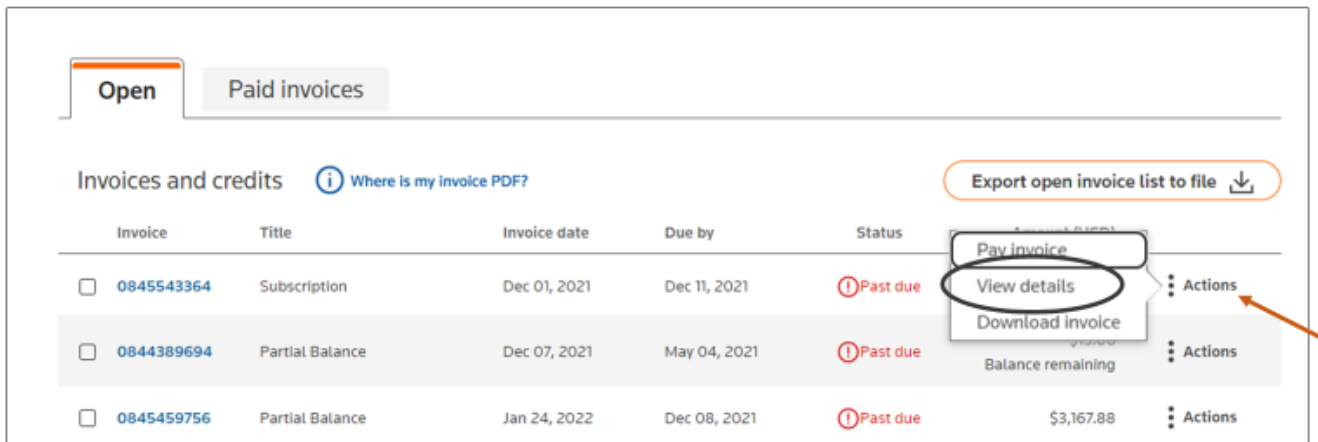
Invoice	Title	Invoice date	Status	Amount (USD)	
0845972625	Invoice	Mar 03, 2022	Paid	\$9,861.00	⋮ Actions
6146919210	Subscription	Mar 01, 2022	Paid	\$100.70	⋮ Actions
6147057679	Subscription	Mar 01, 2022	Paid	\$33.67	⋮ Actions

View Invoice Details

Navigate to the **Billing** tab and click on the Invoice number that you want to view.



You can also view an open invoice by clicking **Actions** and selecting **View details**.



Then, view invoice.

[← Back to billing](#)

Invoice 0845543

[Download Invoice \(PDF\)](#)

Selected amount (USD)

\$154.28

Pay amount

Details

Total amount: **\$154.28**

Due by: **Dec 12, 2021**

Invoice issued: **Dec 01, 2021**

[Report a problem](#)

Account name:

Account number:

610 OPPERMAN DR,
EAGAN, VT, USA,
32103

<input checked="" type="checkbox"/>	<p>A PRACTICAL GUIDE TO PREVENTING LEGAL MALPRACTICE ONE HARDBOUND VOL AND SUPP SUB</p> <p style="font-size: 0.8em;">Posting date: Dec 01, 2021 Posting number: 6145</p>	<p>Total: \$100.70</p>	▼
<input checked="" type="checkbox"/>	<p># LIBRARY MAINTENANCE AGREEMENT SUB</p> <p style="font-size: 0.8em;">Posting date: Dec 01, 2021 Posting number: 6145</p>	<p>Total: \$34.75</p>	▼
<input checked="" type="checkbox"/>	<p># LIBRARY MAINTENANCE AGREEMENT SUB</p> <p style="font-size: 0.8em;">Posting date: Dec 01, 2021 Posting number: 6145</p>	<p>Total: \$13.05</p>	▼
<input checked="" type="checkbox"/>	<p># LIBRARY MAINTENANCE AGREEMENT SUB</p> <p style="font-size: 0.8em;">Posting date: Dec 01, 2021 Posting number: 6145</p>	<p>Total: \$5.78</p>	▼

QuickView (View Westlaw Usage Details)

To view specific usage details on Westlaw invoices, navigate to the Invoice and click **Show itemized charges in QuickView+**.

← Back to billing

Invoice 084564

[Download invoice \(PDF\)](#)

Selected amount (USD)
\$9,861.00

[Pay amount](#)

Details

Total amount: **\$9,861.00**
Due by: **Jan 08, 2022**
Invoice issued: **Jan 03, 2022**
[Report a problem](#)

Account name:
Account number:
610 OPPERMAN DR,
EAGAN, VT, USA,
32103

WEST INFORMATION CHARGES (Usage Period: DEC 01 ,2021 - DEC 31,2021)

Posting number: ~~614500~~

[Show itemized charges in QuickView+](#)

Subscription charges:	\$9,861.00	Pay charge Amount \$9,861.00
Out of plan charges:	\$0.00	
Tax:	\$0.00	
Total:	\$9,861.00	

Next, you will be directed to the QuickView+ website. Sign-in with your OnePass account by clicking the **Sign On** button.



Download Invoice (PDF)

To download invoices in payment past due or processing status, navigate to the **Billing** tab and then either: 1) click on the invoice number that you want to view (as in the first image below) or 2) click on **Actions** and select **Download invoice** (as in the second and third images below).

Billing User access Orders Subscriptions Reports Support Account number

Billing

Total due (USD)
\$34,583.60

[Pay total due](#)

Includes a past due amount of \$34,482.90

[Pay past due](#)

Autopay

Set up autopay and never miss a due date.

[Set up autopay](#)

Quick links

- [Manage payment methods](#)
- [Manage e-billing contacts](#)
- [Payment history](#)

Open Paid invoices

Invoices and credits [Where is my Invoice PDF?](#) [Export open invoice list to file](#)

Invoice	Title	Invoice date	Due by	Status	Amount (USD)	Actions
<input type="checkbox"/> 0845043024	Subscription	Sep 01, 2021	Sep 04, 2021	Payment pending	\$167.33	⋮ Actions
<input type="checkbox"/> 0845377694	Subscription	Nov 01, 2021	Nov 11, 2021	Payment pending	\$154.28	⋮ Actions
<input type="checkbox"/> 0845646956	West Information Charges	Jan 03, 2022	Jan 08, 2022	Payment pending	\$9,861.00	⋮ Actions

Billing

Account number: _____

Billing

Total due (USD)
\$34,583.60

[Pay total due](#)

Includes a past due amount of \$34,482.90

[Pay past due](#)

Autopay

Set up autopay and never miss a due date.

[Set up autopay](#)

Quick links

- [Manage payment methods](#)
- [Manage e-billing contacts](#)
- [Payment history](#)

Open | **Paid invoices**

Invoices and credits [Where is my Invoice PDF?](#) [Export open invoice list to file](#)

Invoice	Title	Invoice date	Due by	Status	Amount (USD)	Actions
<input type="checkbox"/> 0845043024	Subscription	Sep 01, 2021	Sep 04, 2021	Payment pending	\$167.33	⋮ Actions
<input type="checkbox"/> 084537694	Subscription	Nov 01, 2021	Nov 11, 2021	Payment pending		View details Download invoice ⋮ Actions
<input type="checkbox"/> 0845646956	West Information Charges	Jan 03, 2022	Jan 06, 2022	Payment pending	\$9,861.00	⋮ Actions

Billing

User access Orders Subscriptions Reports Support

Account number:

Billing

Total due (USD)

\$34,583.60

[Pay total due](#)

Includes a past due amount of \$34,482.90

[Pay past due](#)

Autopay

Set up autopay and never miss a due date.

[Set up autopay](#)

Quick links

- [Manage payment methods](#)
- [Manage e-billing contacts](#)
- [Payment history](#)

Open Paid invoices

Invoices and credits [Where is my invoice PDF?](#) [Export open invoice list to file](#)

Invoice	Title	Invoice date	Due by	Status	Balance remaining	Actions
<input type="checkbox"/> 0045543364	Subscription	Dec 01, 2021	Dec 11, 2021	ⓘ Past due		<ul style="list-style-type: none"> Pay invoice View details Download invoice
<input type="checkbox"/> 0044389694	Partial Balance	Dec 07, 2021	May 04, 2021	ⓘ Past due		<ul style="list-style-type: none"> Balance remaining Actions
<input type="checkbox"/> 0045459756	Partial Balance	Jan 24, 2022	Dec 08, 2021	ⓘ Past due	\$3,167.88	<ul style="list-style-type: none"> Actions
<input type="checkbox"/> 0045124537	Partial Balance	Jan 24, 2022	Oct 08, 2021	ⓘ Past due	\$791.34	<ul style="list-style-type: none"> Actions

Next, click **Download invoice [PDF]** on right side.

← Back to billing

Invoice 084471

Selected amount (USD)
\$149.99

[Pay amount](#)

Details

Total amount: **\$149.99**
 Due by: **Oct 20, 2021**
 Invoice issued: **Jul 01, 2021**
[Report a problem](#)

Account name:
 Account number:

610 OPPERMAN DR,
 EAGAN, VT, USA,
 32103

[Download invoice \(PDF\)](#)

This invoice has no further details. If you need more info, [contact us](#).

To download paid invoices, navigate to the **Billing** tab, then click the **Paid invoices** tab. Next, click on the **Actions** tab and select **Download invoice**.

Billing User access Orders Subscriptions Reports Support

Account number:

Billing

Total due (USD)
\$44,603.90

[Pay total due](#)

Includes a past due amount of \$34,583.60

[Pay past due](#)

Autopay

Set up autopay and never miss a due date.

[Set up autopay](#)

Quick links

- Manage payment methods >
- Manage e-billing contacts >
- Payment history >

Open **Paid invoices**

Invoices [Where is my invoice PDF?](#) [Export paid invoice list to file](#)

Invoice	Title	Invoice date	Status	Amount (USD)	Actions
0846230921	Subscription	Apr 04, 2022	Paid		Download invoice Actions
0846132500	West Information Charges	Apr 03, 2022	Paid	\$580.00 Partial payment	Actions

Export Open Invoice List to File

To view the open invoice list as an Excel document, navigate to the **Billing** tab. Next, click the **Open** tab. Then, click **Export open invoice list to file**.

The screenshot shows the 'Billing' section of a self-service portal. At the top, there are navigation tabs: Billing, User access, Orders, Subscriptions, Reports, and Support. The 'Billing' tab is active. Below the navigation, there is a header with 'Account number:'. The main content area is titled 'Billing' and contains three panels: 'Total due (USD)' showing \$44,603.90 with a 'Pay total due' button and a note about a past due amount of \$34,583.60; 'Autopay' with an illustration of a calendar and a dollar sign, and a 'Set up autopay' button; and 'Quick links' with options for 'Manage payment methods', 'Manage e-billing contacts', and 'Payment history'. Below these panels, there are two tabs: 'Open' (selected) and 'Paid invoices'. Under the 'Open' tab, there is a section for 'Invoices and credits' with a link 'Where is my invoice PDF?'. A button 'Export open invoice list to file' with a download icon is circled in orange and pointed to by an orange arrow. Below this is a table of invoices.

Invoice	Title	Invoice date	Due by	Status	Amount (USD)	
<input type="checkbox"/> 0845543364	Subscription	Dec 01, 2021	Dec 11, 2021	ⓘ Past due	\$154.28	⋮ Actions
<input type="checkbox"/> 0844389694	Partial Balance	Dec 07, 2021	May 04, 2021	ⓘ Past due	\$13.06 Balance remaining	⋮ Actions

After clicking Export open invoice list to file, you will see blue and green status bars popup similar to the ones below. When the download completes, a **file exported** box will appear.

The screenshot displays the 'Billing' section of a self-service portal. At the top, there is a navigation bar with 'Billing' selected. Below the navigation bar, the 'Billing' section is divided into three main areas: 'Total due (USD)' showing a balance of \$44,603.90 with a 'Pay total due' button and a note about a past due amount of \$34,583.60; 'Autopay' with an illustration of a laptop and a calendar, and a 'Set up autopay' button; and 'Quick links' for managing payment methods, e-billing contacts, and payment history.

Below these sections, there are tabs for 'Open' and 'Paid invoices'. The 'Open' tab is active, showing a table of 'Invoices and credits'. Two status bars are overlaid on the table:

- A blue bar: "Preparing open invoice list for download. File will download when ready." (with a close 'x' button)
- A green bar: "Open Invoices list successfully downloaded. Please check downloads folder." (with a close 'x' button)

To the right of the table, a 'File exported' confirmation box with a checkmark is visible. An orange arrow points to this box from the right side of the image.

Invoice	Title	Invoice date	Due by	Status	Amount (USD)	Actions
<input type="checkbox"/> 0845543364	Subscription				\$154.28	⋮ Actions
<input type="checkbox"/> 0844286604	Partial Balance			⚠️ Past due	\$13.06	⋮ Actions

Once the green status box appears, open the download. The file will open as an Excel spreadsheet that looks similar to the one below. **Note, you may need to adjust the column widths to properly view the data.**

The screenshot shows an Excel spreadsheet with the following data:

Invoice	Title	Invoice date	Due by	Status	Amount	Amount description
845043024	Subscription	1-Sep-21	4-Sep-21	Payment pending	\$167.33	
845215287	Subscription	1-Oct-21	11-Oct-21	Payment pending	\$154.28	
845377694	Subscription	1-Nov-21	11-Nov-21	Payment pending	\$154.28	
845646956	West Information Charges	3-Jan-22	8-Jan-22	Payment pending	\$9,861.00	
845892783	Subscription	1-Feb-22	11-Feb-22	Payment pending	\$53.58	
845892782	Subscription	1-Feb-22	6-Mar-22	Payment pending	\$100.70	
845811045	West Information Charges	3-Feb-22	3-Mar-22	Payment pending	\$9,861.00	
846053923	Subscription	1-Mar-22	11-Mar-22	Payment pending	\$53.57	
844716448	Subscription	1-Jul-21	20-Oct-21	Past due	\$149.99	Balance remaining
844584349	West Information Charges	3-Jul-21	27-Oct-21	Past due	\$456.00	
845543364	Subscription	1-Dec-21	11-Dec-21	Past due	\$154.28	
844389694	Partial Balance	7-Dec-21	4-May-21	Past due	\$13.06	Balance remaining
845459756	Partial Balance	24-Jan-22	8-Dec-21	Past due	\$3,167.88	
845124537	Partial Balance	24-Jan-22	8-Oct-21	Past due	\$791.34	
846053922	Subscription	1-Mar-22	3-Apr-22	Past due	\$100.70	

Export Paid Invoice List to File

To view the paid invoice list as an Excel document, navigate to the **Billing** tab. Next, click the **Paid invoices** tab. Then, click **Export paid invoice list to file**.

Account number:

Billing

Your account is up to date

No payment due

Autopay

Set up autopay and never miss a due date.

Set up autopay

Quick links

- Manage payment methods >
- Manage e-billing contacts >
- Payment history >

Open Paid invoices

Invoices

Export paid invoice list to file ↓

Invoice	Title	Invoice date	Status	Amount (USD)	Actions
0845972625	Invoice	Mar 03, 2022	Paid	\$9,861.00	⋮ Actions
6146919210	Subscription	Mar 01, 2022	Paid	\$100.70	⋮ Actions
6147057679	Subscription	Mar 01, 2022	Paid	\$33.67	⋮ Actions

After clicking Export paid invoice list to file, you will see blue and green status bars popup similar to the ones below. When the download completes, a **file exported** box will appear.

The screenshot shows the 'Billing' section of a self-service portal. The 'Paid invoices' tab is active, displaying a table of invoices. Two status bars are overlaid on the table: a blue one indicating the download is in progress and a green one indicating it is complete. A 'File exported' confirmation box is also present in the top right of the table area.

Invoice	Title	Amount (USD)	Actions
0845972625	Invoice	\$9,861.00	⋮ Actions
6146919210	Subscription	\$100.70	⋮ Actions

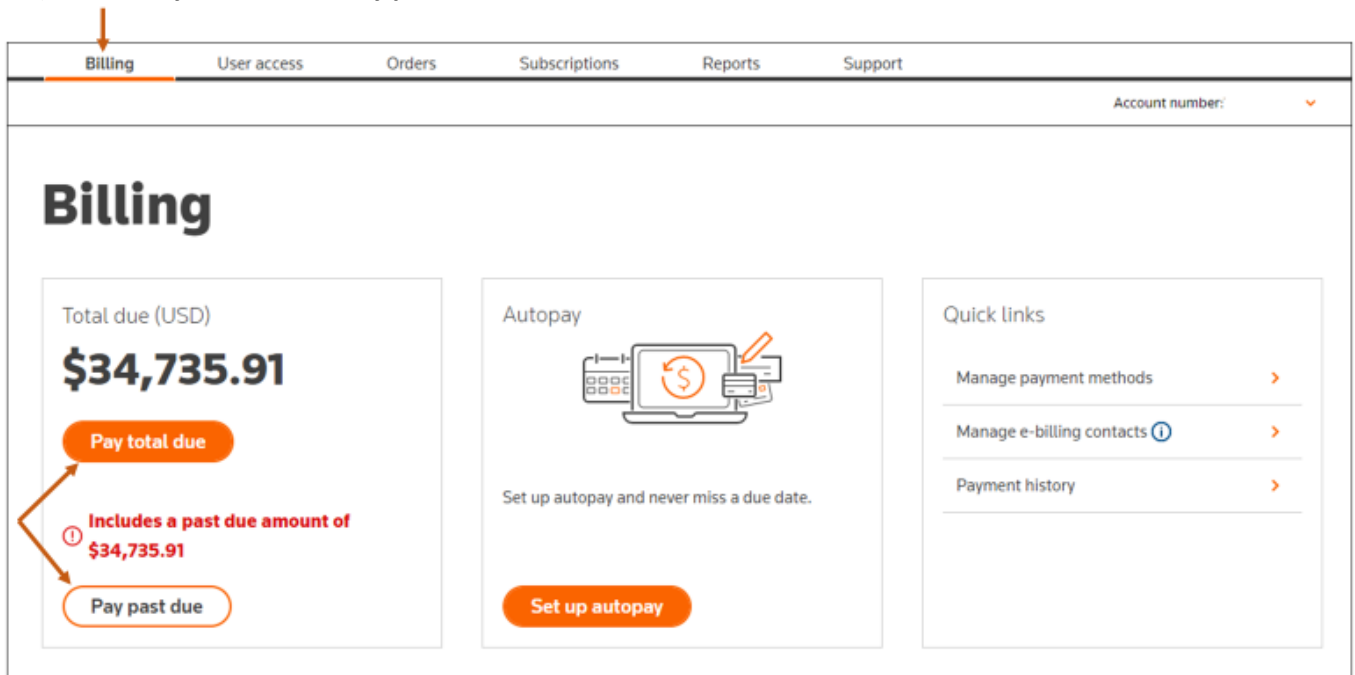
File exported ✓

Make Payments

Pay total due, select invoices, or past due amounts

From the **Billing** tab, there are several ways to access the one-time make a payment box.

- 1) Click **Pay total due** or **Pay past due** on left-side box.



2) Click **Actions** from the **Open** tab and then select **Pay invoice**.

Billing User access Orders Subscriptions Reports Support Account number: [redacted]

Billing

Total due (USD)
\$34,583.60
 Pay total due
 Includes a past due amount of \$34,482.90
 Pay past due

Autopay
 Set up autopay and never miss a due date.
 Set up autopay

Quick links
 Manage payment methods >
 Manage e-billing contacts >
 Payment history >

Open Paid invoices

Invoices and credits [Where is my Invoice PDF?](#) Export open invoice list to file

Invoice	Title	Invoice date	Due by	Status	Actions
<input type="checkbox"/> 0845543364	Subscription	Dec 01, 2021	Dec 11, 2021	Past due	Pay invoice View details Download invoice
<input type="checkbox"/> 0844389694	Partial Balance	Dec 07, 2021	May 04, 2021	Past due	Balance remaining Actions
<input type="checkbox"/> 0845459756	Partial Balance	Jan 24, 2022	Dec 08, 2021	Past due	\$3,167.88 Actions

3) Click on the Invoice number from the **Open** tab.

Billing

Account number:

Total due (USD)
\$34,583.60

Pay total due

Includes a past due amount of \$34,482.90

Pay past due

Autopay

Set up autopay and never miss a due date.

Set up autopay

Quick links

- Manage payment methods >
- Manage e-billing contacts ⓘ >
- Payment history >

Open | Paid invoices

Invoices and credits ⓘ [Where is my invoice PDF?](#) **Export open invoice list to file** ⬇

Invoice	Title	Invoice date	Due by	Status	Amount (USD)	
<input type="checkbox"/> 0845543364	Subscription	Dec 01, 2021	Dec 11, 2021	ⓘ Past due	\$154.28	⋮ Actions
<input type="checkbox"/> 0844389694	Partial Balance	Dec 07, 2021	May 04, 2021	ⓘ Past due	\$13.06 Balance remaining	⋮ Actions

Next, click **Pay amount**.

← Back to billing

Invoice 0845543

[Download Invoice \(PDF\)](#)

Selected amount (USD)
\$154.28

Pay amount

Details

Total amount: **\$154.28** Account name:
Due by: **Dec 12, 2021** Account number:
Invoice issued: **Dec 01, 2021** 610 OPPERMAN DR,
EAGAN, VT, USA,
32103

[Report a problem](#)

<input checked="" type="checkbox"/>	A PRACTICAL GUIDE TO PREVENTING LEGAL MALPRACTICE ONE HARDBOUND VOL AND SUPP SUB Posting date: Dec 01, 2021 Posting number: 6145	Total: \$100.70	▼
<input checked="" type="checkbox"/>	# LIBRARY MAINTENANCE AGREEMENT SUB Posting date: Dec 01, 2021 Posting number: 6145	Total: \$34.75	▼
<input checked="" type="checkbox"/>	# LIBRARY MAINTENANCE AGREEMENT SUB Posting date: Dec 01, 2021 Posting number: 6145	Total: \$13.05	▼
<input checked="" type="checkbox"/>	# LIBRARY MAINTENANCE AGREEMENT SUB Posting date: Dec 01, 2021 Posting number: 6145	Total: \$5.78	▼

- 4) From the **Open** invoices tab, check the box next to the invoice you want to pay. Then, click **Pay now** on the bottom of the screen.

The screenshot displays the 'Open' invoices tab in a self-service portal. At the top, there are tabs for 'Open' and 'Paid invoices'. Below the tabs, the text 'Invoices and credits' is followed by a help icon and the text 'Where is my invoice PDF?'. On the right, there is a button 'Export open invoice list to file' with a download icon. The main content is a table of invoices with columns: Invoice, Title, Invoice date, Due by, Status, and Amount (USD). The first row is highlighted in yellow and has its checkbox checked. Below the table, there is a summary bar showing '1 selected: \$154.28 USD total' and '1 Invoice: \$154.28'. A 'Pay now' button is highlighted with a white circle and an arrow. There is also a 'Dismiss' button on the right.

Invoice	Title	Invoice date	Due by	Status	Amount (USD)	Actions
<input checked="" type="checkbox"/> 0845543364	Subscription	Dec 01, 2021	Dec 31, 2021	Past due	\$154.28	⋮ Actions
<input type="checkbox"/> 0844389694	Partial Balance	Dec 07, 2021	May 04, 2021	Past due	\$13.06 Balance remaining	⋮ Actions
<input type="checkbox"/> 0845459756	Partial Balance	Jan 24, 2022	Dec 08, 2021	Past due	\$3,367.88	⋮ Actions
<input type="checkbox"/> 0845124537	Partial Balance	Jan 24, 2022	Oct 08, 2021	Past due	\$791.34	⋮ Actions
<input type="checkbox"/> 0846053922	Subscription	Mar 01, 2022	Apr 03, 2022	Past due	\$100.70	⋮ Actions
<input type="checkbox"/> 0845972625	West Information Charges	Mar 03, 2022	Mar 31, 2022	Past due	\$9,861.00	⋮ Actions
<input type="checkbox"/> 6145032761	Partial Balance	Mar 12, 2022	Dec 06, 2021	Past due	\$284.52 Balance remaining	⋮ Actions
<input type="checkbox"/> 0846230921	Subscription	Apr 01, 2022	May 04, 2022	Past due	\$100.70 Balance remaining	⋮ Actions
<input type="checkbox"/> 0846230922	Subscription	Apr 01, 2022	Apr 11, 2022	Past due	\$53.57	⋮ Actions
<input type="checkbox"/> 0846132500	Partial Balance	Apr 20, 2022	May 01, 2022	Past due	\$9,281.00 Balance remaining	⋮ Actions

Viewing 11 - 20 < Previous 1 2 3 Next > Rows per page 10

1 selected: **\$154.28 USD total**
1 Invoice: \$154.28 **Pay now** × Dismiss

- 5) To pay multiple invoices at the same time, click the box next to each invoice number you want to pay from the **Open** invoices tab. Then, click **Pay now** on the bottom of the screen.

The screenshot shows the 'Open' tab selected in the 'Invoices and credits' section. A table lists various invoices, with three rows highlighted in yellow and their checkboxes checked. An orange arrow points from the text above to these three rows. At the bottom, a summary bar shows '3 selected: \$958.68 USD total' and a 'Pay now' button circled in white with an orange arrow pointing to it.

Invoice	Title	Invoice date	Due by	Status	Amount (USD)	Actions
<input checked="" type="checkbox"/> 0845543364	Subscription	Dec 01, 2021	Dec 11, 2021	Past due	\$154.28	⋮ Actions
<input checked="" type="checkbox"/> 0844389694	Partial Balance	Dec 07, 2021	May 04, 2021	Past due	\$13.06 Balance remaining	⋮ Actions
<input type="checkbox"/> 0845459756	Partial Balance	Jan 24, 2022	Dec 08, 2021	Past due	\$3,167.88	⋮ Actions
<input checked="" type="checkbox"/> 0845124537	Partial Balance	Jan 24, 2022	Oct 08, 2021	Past due	\$791.34	⋮ Actions
<input type="checkbox"/> 0846053922	Subscription	Mar 01, 2022	Apr 03, 2022	Past due	\$100.70	⋮ Actions
<input type="checkbox"/> 0845972625	West Information Charges	Mar 03, 2022	Mar 31, 2022	Past due	\$9,861.00	⋮ Actions
<input type="checkbox"/> 6145032761	Partial Balance	Mar 12, 2022	Dec 06, 2021	Past due	\$284.52 Balance remaining	⋮ Actions
<input type="checkbox"/> 0846230921	Subscription	Apr 01, 2022	May 04, 2022	Past due	\$100.70 Balance remaining	⋮ Actions
<input type="checkbox"/> 0846230922	Subscription	Apr 01, 2022	Apr 11, 2022	Past due	\$53.57	⋮ Actions
<input type="checkbox"/> 0846132500	Partial Balance	Apr 20, 2022	May 01, 2022	Past due	\$9,281.00 Balance remaining	⋮ Actions

Viewing 11 - 20 < Previous 1 2 3 Next > Rows per page 10

3 selected: \$958.68 USD total
3 invoices: \$958.68 **Pay now** X Dismiss

After taking one of the options above, select payment method from the dropdown menu.

Make a payment [Cancel and go back to billing](#)

1 **Payment method** ^

Choose a payment method

- Choose a payment method
- Bank account ending in 0091
- Bank account ending in 5216
- Bank account ending in 5789
- Bank account ending in 2345
- Bank account ending in 3344
- Bank account ending in 3376
- Add new payment method**

Payment summary
[View details](#)

Total invoice amount	\$34,735.91
Credits applied (0)	\$0.00

Remaining balance \$34,735.91

2 **Confirmation** v

Then, click **Next**.

Make a payment [Cancel and go back to billing](#)

1 **Payment method** ^

Choose a payment method

Next [Cancel](#)

Payment summary
[View details](#)

Total invoice amount	\$34,735.91
Credits applied (0)	\$0.00

Remaining balance \$34,735.91

2 **Confirmation** v

Next, click **Pay**.

Make a payment [Cancel and go back to billing](#)

1 **Payment method** ▼
Bank account ending in 5216


2 **Confirmation** ▲

Total invoice amount **USD \$34,735.91**
Credits applied **USD \$0.00**
Remaining balance USD \$34,735.91
Account number *****5216

Pay **Back**

Then, you will see a popup window similar to the one below confirming that payment was made and offering the ability to provide feedback on the billing experience.

Thanks for your payment

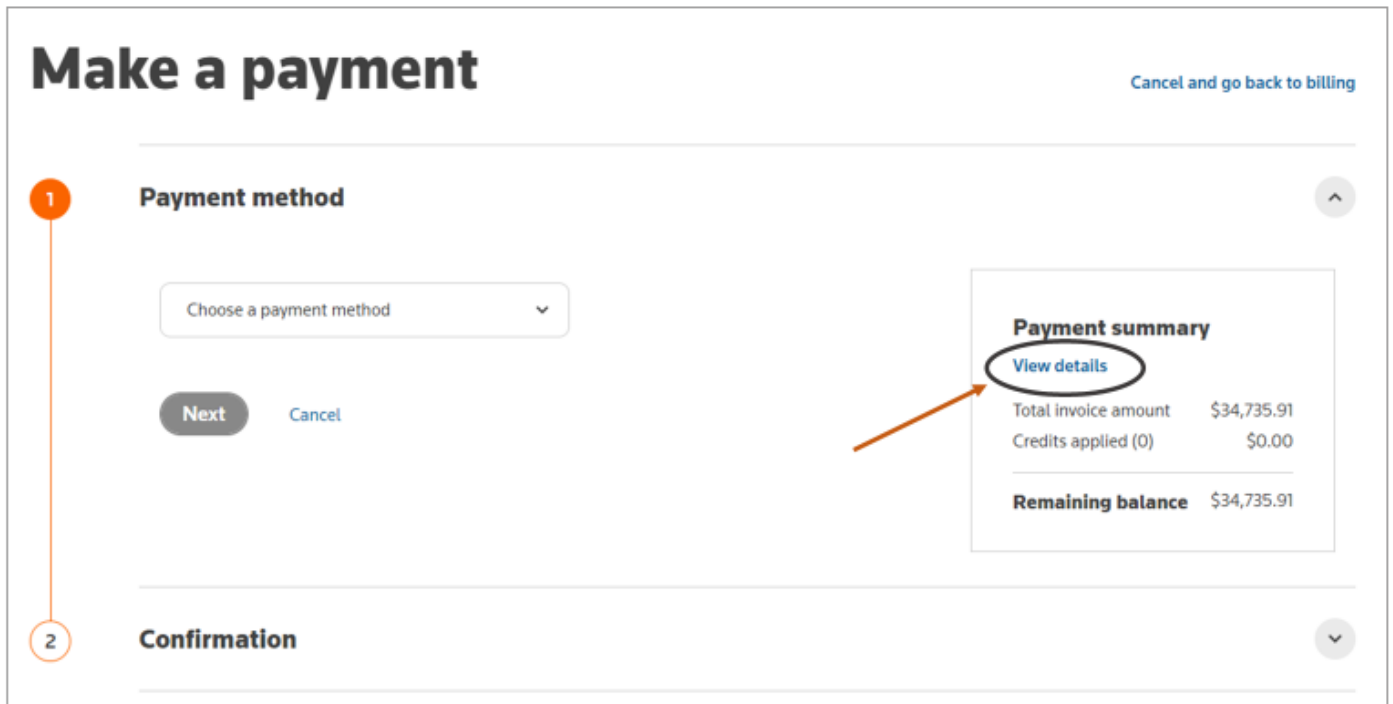
 Your payment of **USD \$0.69** will be processed within 1 to 2 business days.

Your confirmation number is 000357550775.

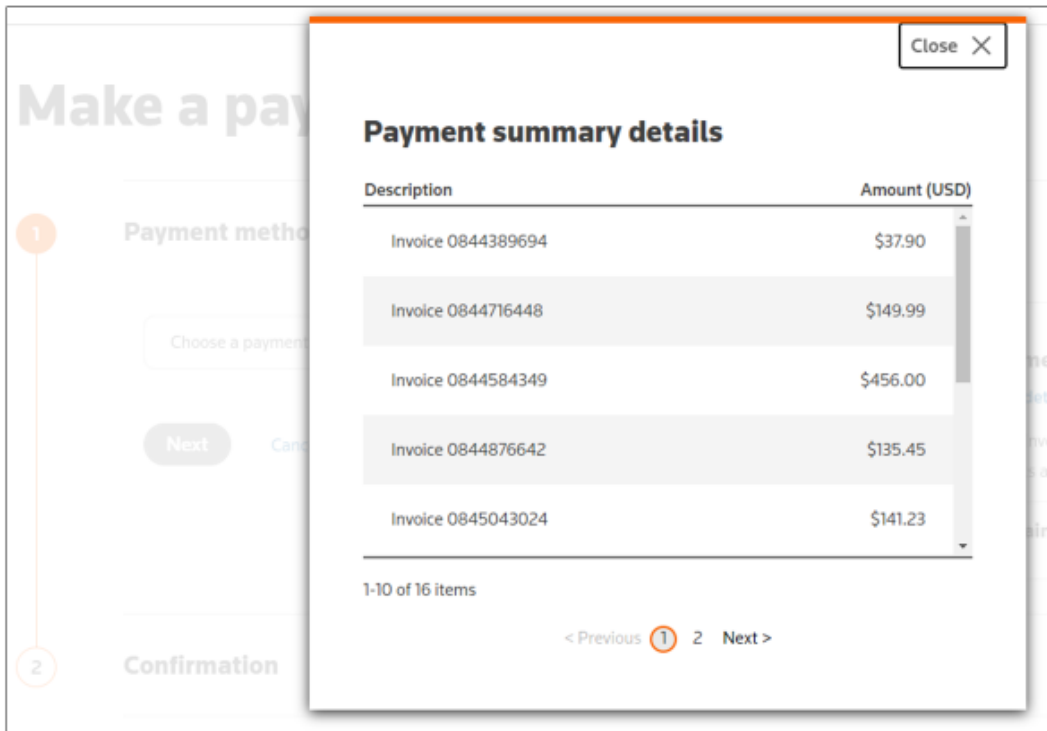
Back to billing

How would you rate your payment experience ☆☆☆☆☆

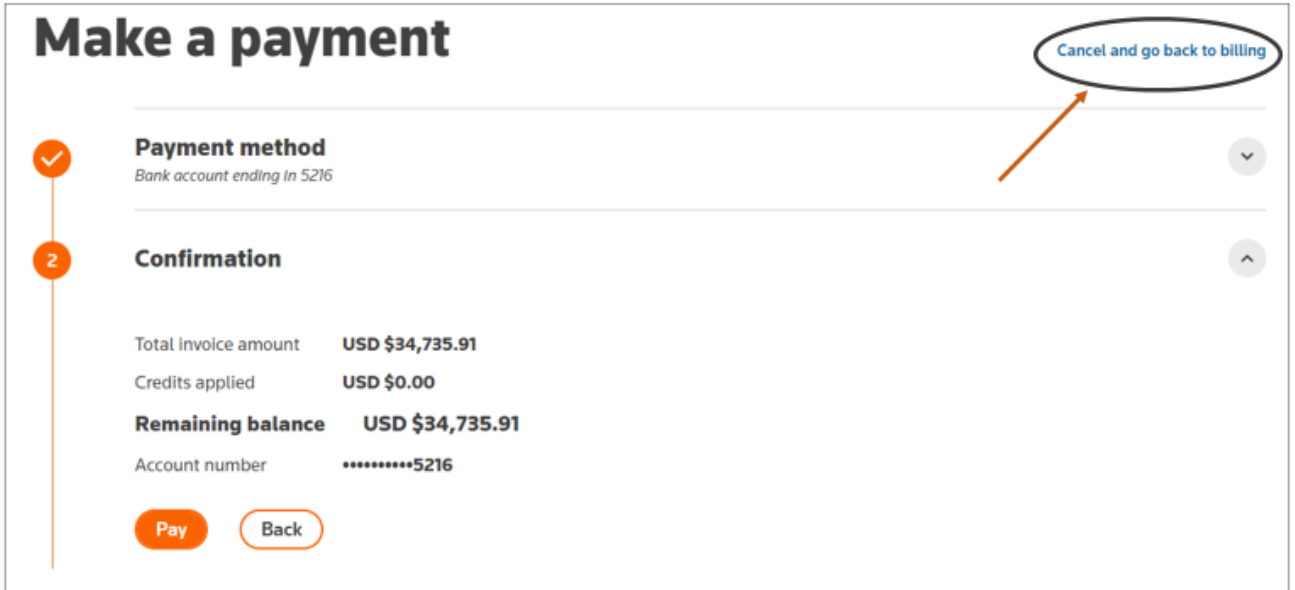
To view a summary of payment details before making a payment, click **View details** from the **Payment summary** box on the right side of the **Make a payment** page.



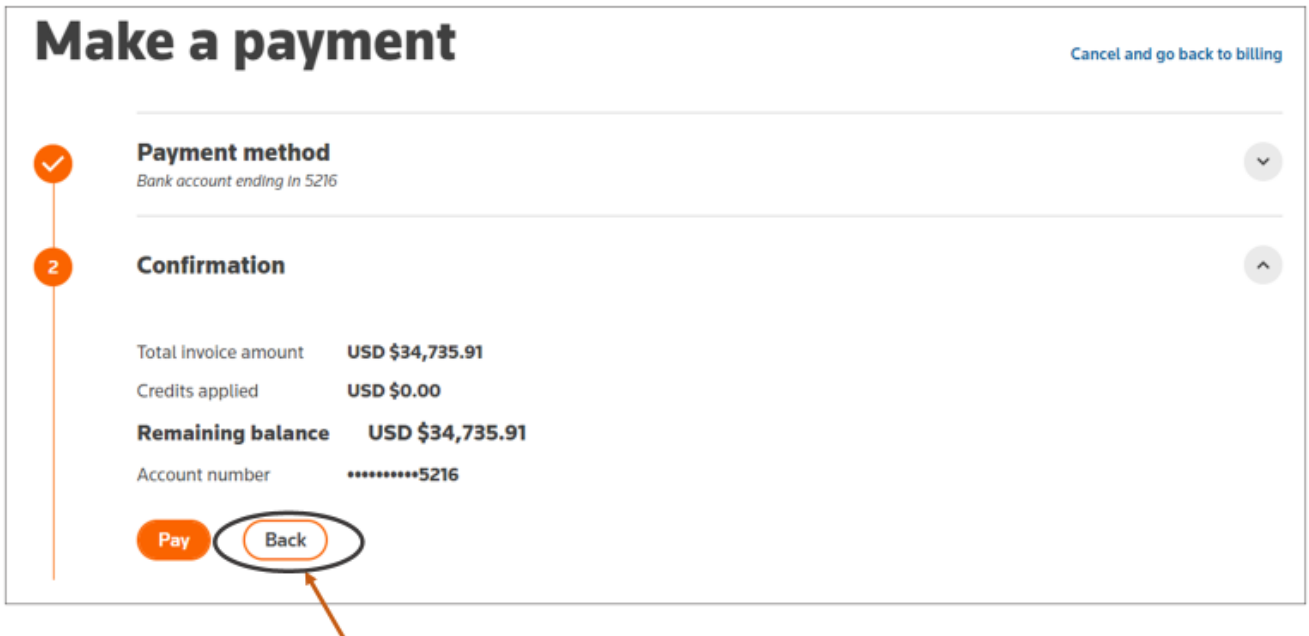
A popup window similar to the one below will provide the summary of payment details.



If you would like to cancel the payment process before clicking Pay on the Make a payment page, click on **Cancel and go back to billing**.

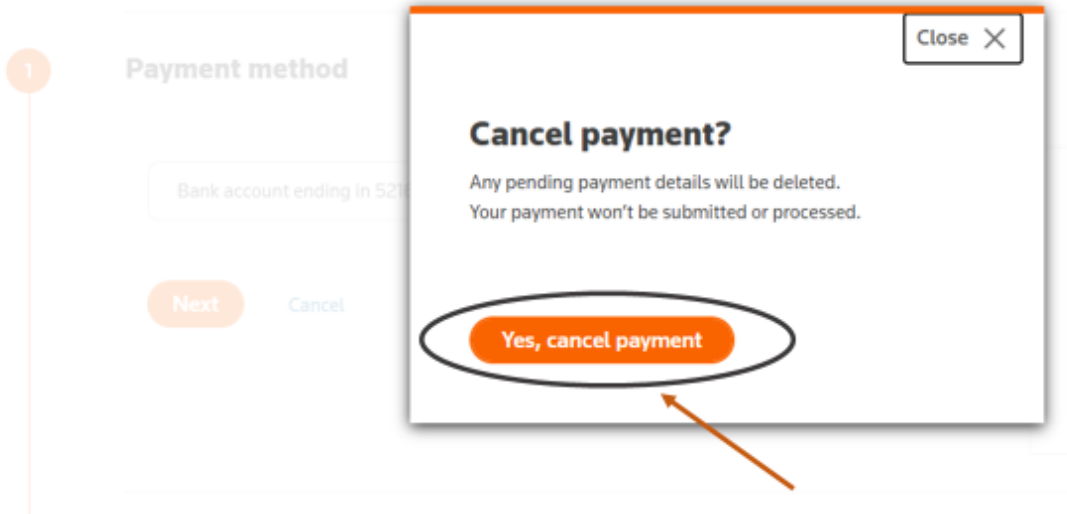


You can also cancel a payment from the Make a Payment page by clicking Back.



After either action above, click **Yes, cancel payment**.

Make a payment



Make a Partial Payment

Navigate to the **Billing** tab. Next, either click the invoice number (as in the first image below) or click **Actions** and select **View details** (as in the second image below).

The screenshot shows the Billing portal interface. At the top, there are navigation tabs: **Billing**, User access, Orders, Subscriptions, Reports, and Support. An arrow points to the **Billing** tab. Below the tabs is an "Account number" field.

The main content area is titled **Billing** and contains three main sections:

- Total due (USD):** \$44,449.62. Includes a "Pay total due" button and a note: "Includes a past due amount of \$34,429.32" with a "Pay past due" button.
- Autopay:** "Set up autopay and never miss a due date." with a "Set up autopay" button.
- Quick links:**
 - Manage payment methods
 - Manage e-billing contacts
 - Payment history

Below these sections are two tabs: **Open** (selected) and **Paid invoices**.

The **Invoices and credits** section includes a link "Where is my invoice PDF?" and an "Export open invoice list to file" button. Below is a table of open invoices:

Invoice	Title	Invoice date	Due by	Status	Amount (USD)	Actions
<input type="checkbox"/> 1400463026	WO GW sm balance	Apr 23, 2022	Apr 23, 2022	Past due	\$0.01	⋮ Actions
<input type="checkbox"/> 0846393500	Subscription	May 01, 2022	Jun 03, 2022	Past due	\$100.70	⋮ Actions
<input type="checkbox"/> 0846393501	Subscription	May 02, 2022	May 11, 2022	Past due	\$53.57	⋮ Actions
<input type="checkbox"/> 0846390794	West Information Charges	May 03, 2022	May 31, 2022	Past due	\$9,861.00	⋮ Actions

An arrow points to the invoice number **0846393501** in the table.

Billing User access Orders Subscriptions Reports Support Account number:

Billing

Total due (USD)

\$44,449.62

[Pay total due](#)

Includes a past due amount of \$34,429.32

[Pay past due](#)

Autopay

Set up autopay and never miss a due date.

[Set up autopay](#)

Quick links

- [Manage payment methods](#)
- [Manage e-billing contacts](#)
- [Payment history](#)

Open

Paid invoices

Invoices and credits [Where is my invoice PDF?](#) [Export open invoice list to file](#)

Invoice	Title	Invoice date	Due by	Status	Amount (USD)	Actions
<input type="checkbox"/> 1400463026	WO CW sm balance	Apr 23, 2022	Apr 23, 2022	Past due	\$0.01	Actions
<input type="checkbox"/> 0846393500	Subscription	May 01, 2022	Jun 03, 2022	Past due	\$100.00	Actions
<input type="checkbox"/> 0846393501	Subscription	May 02, 2022	May 11, 2022	Past due	\$100.00	Actions
<input type="checkbox"/> 0846310794	West Information Charges	May 03, 2022	May 31, 2022	Past due	\$9,861.00	Actions

Next, check the boxes next to the items in the invoice you want to pay.

[← Back to billing](#)

Invoice 08463

[Download invoice \(PDF\)](#)

Selected amount (USD)
\$53.57

[Pay amount](#)

Details

Total amount: **\$53.57** Account name:
Due by: **May 11, 2022** Account number:
Invoice issued: **May 02, 2022** 610 OPPERMAN DR,
EAGAN, VT, USA,
32103

[Report a problem](#)

<input checked="" type="checkbox"/>	# LIBRARY MAINTENANCE AGREEMENT SUB Posting date: May 02, 2022 Posting number: 614818	Total: \$33.67	▼
<input checked="" type="checkbox"/>	# LIBRARY MAINTENANCE AGREEMENT SUB Posting date: May 02, 2022 Posting number: 614818	Total: \$13.61	▼
<input checked="" type="checkbox"/>	# LIBRARY MAINTENANCE AGREEMENT SUB Posting date: May 02, 2022 Posting number: 614818	Total: \$6.29	▼

Expand an item to see more details by clicking on the carrot to the right of that item.

← Back to billing

Invoice 08463

[Download invoice \(PDF\)](#)

Selected amount (USD)
\$53.57

[Pay amount](#)

Details


Total amount: **\$53.57** Account name:

Due by: **May 11, 2022** Account number:


Invoice issued: **May 02, 2022**

610 OPPERMAN DR,
EAGAN, VT, USA,
32103

[Report a problem](#)


LIBRARY MAINTENANCE AGREEMENT SUB **Total: \$33.67** 

Posting date: **May 02, 2022** | Posting number: **614818**

LIBRARY MAINTENANCE AGREEMENT SUB **Total: \$13.61** 

Posting date: **May 02, 2022** | Posting number: **614818**

Item	Billed	Selected to pay		Per item	Total with tax
<input checked="" type="checkbox"/> ADMIN LAW PR & PROC SUB	1	-	<input type="text" value="1"/>	+\$	\$6.32 \$6.77
<input checked="" type="checkbox"/> AR CODE ANNO COURT RULES SUB	1	-	<input type="text" value="1"/>	+\$	\$4.59 \$4.92
<input checked="" type="checkbox"/> CA DRUNK DRIVING DEFENSE SUB	1	-	<input type="text" value="1"/>	+\$	\$1.14 \$1.22
<input checked="" type="checkbox"/> CA DESKTOP PROB CODE ANNO SUB	1	-	<input type="text" value="1"/>	+\$	\$0.65 \$0.70

LIBRARY MAINTENANCE AGREEMENT SUB **Total: \$6.29** 

Posting date: **May 02, 2022** | Posting number: **614818**

Next, uncheck the box next to any item you do not want to pay at this time. Then, click **Pay amount**.

← Back to billing

Invoice 08463

Selected amount (USD)
\$39.81

Pay amount

Details
 Total amount: \$58.57
 Due by: **May 11, 2022**
 Invoice issued: **May 02, 2022**
[Report a problem](#)

Account name:
Account number:
630 OPPERMAN DR,
EAGAN, VT, USA,
52105

[Download Invoice \(PDF\)](#)

LIBRARY MAINTENANCE AGREEMENT SUB Total: \$33.67

Posting date: **May 02, 2022** | Posting number: **614818**

LIBRARY MAINTENANCE AGREEMENT SUB Total: \$6.14

Posting date: **May 02, 2022** | Posting number: **614818**

Item	Billed	Selected to pay	Per item	Total with tax
<input type="checkbox"/> ADMIN LAW PR & PROC SUB	1	[-] <input type="text"/> [+]	\$6.32	--
<input checked="" type="checkbox"/> AR CODE ANNO COURT RULES SUB	1	[-] <input type="text" value="1"/> [+]	\$4.59	\$4.92
<input checked="" type="checkbox"/> CA DRUNK DRIVING DEFENSE SUB	1	[-] <input type="text" value="1"/> [+]	\$1.14	\$1.22
<input type="checkbox"/> CA DESKTOP PROB CODE ANNO SUB	1	[-] <input type="text"/> [+]	\$0.65	--

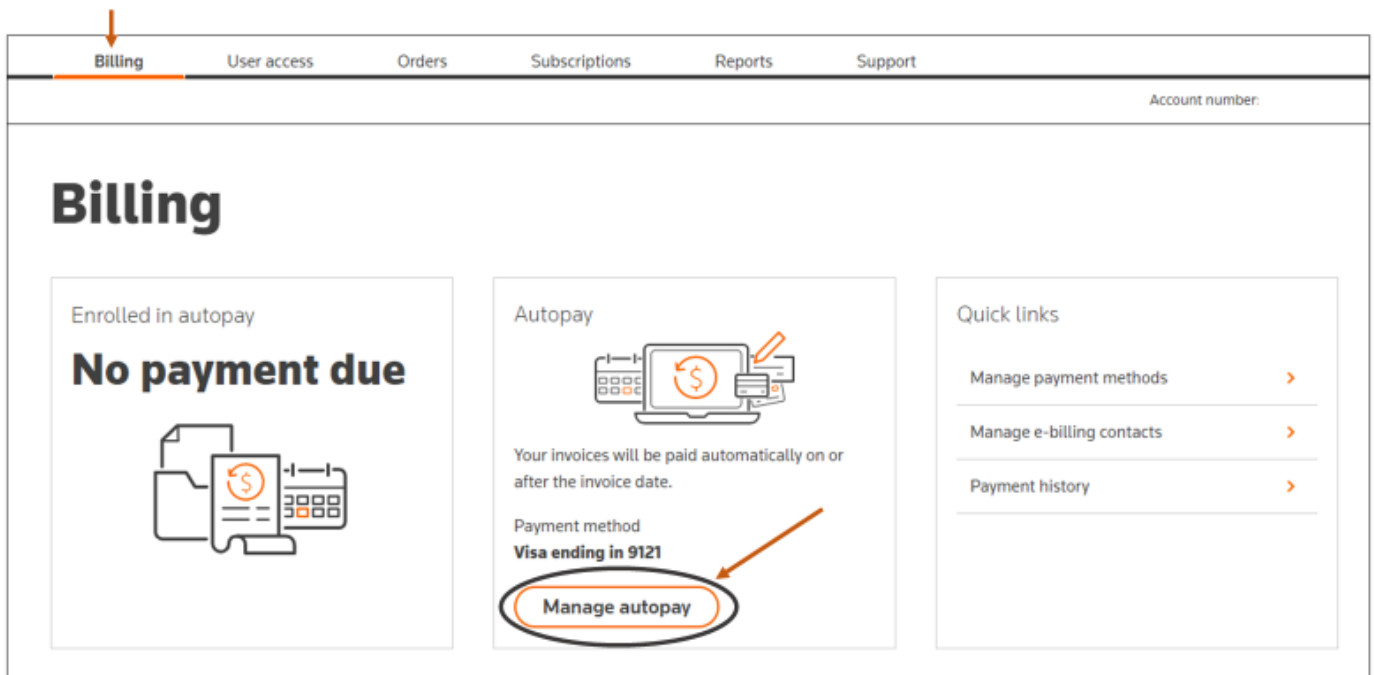
LIBRARY MAINTENANCE AGREEMENT SUB Total: \$0.00

Posting date: **May 02, 2022** | Posting number: **614818**

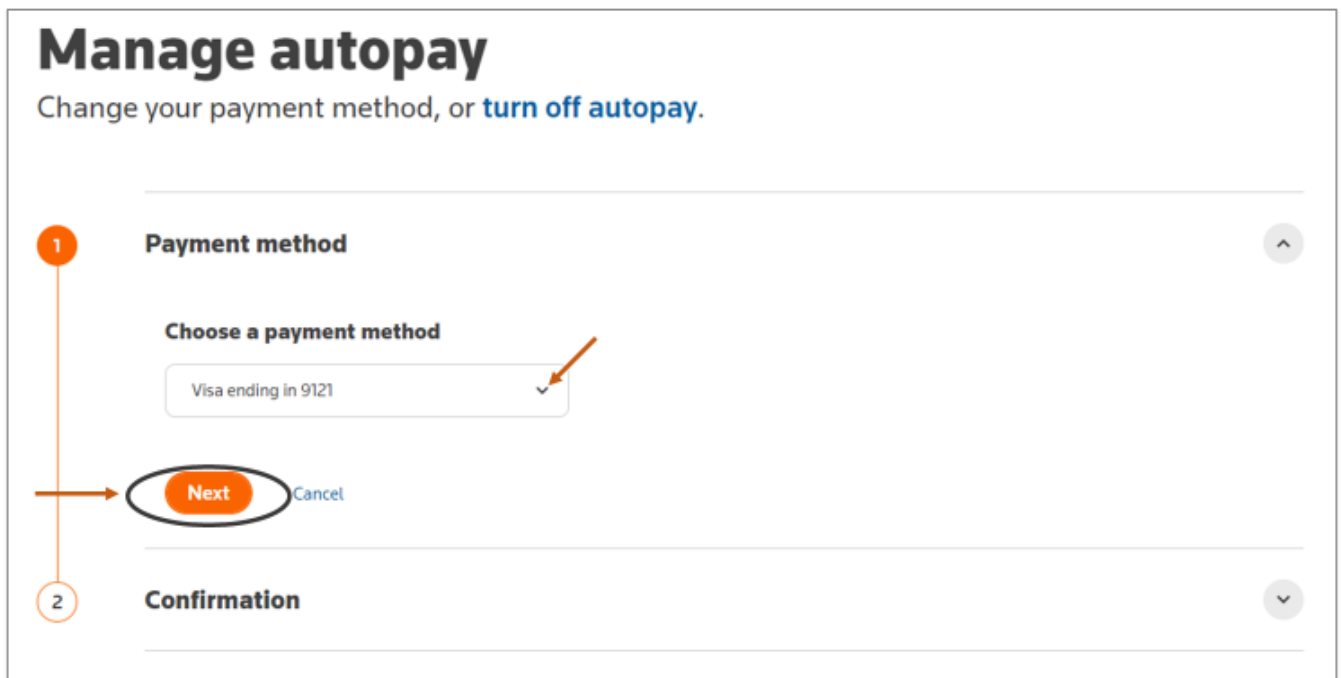
Next, follow the instructions to **Make a Payment** provided in this guide.

Manage Autopay

Navigate to the **Billing** tab. Next, click **Manage autopay** from the center box.

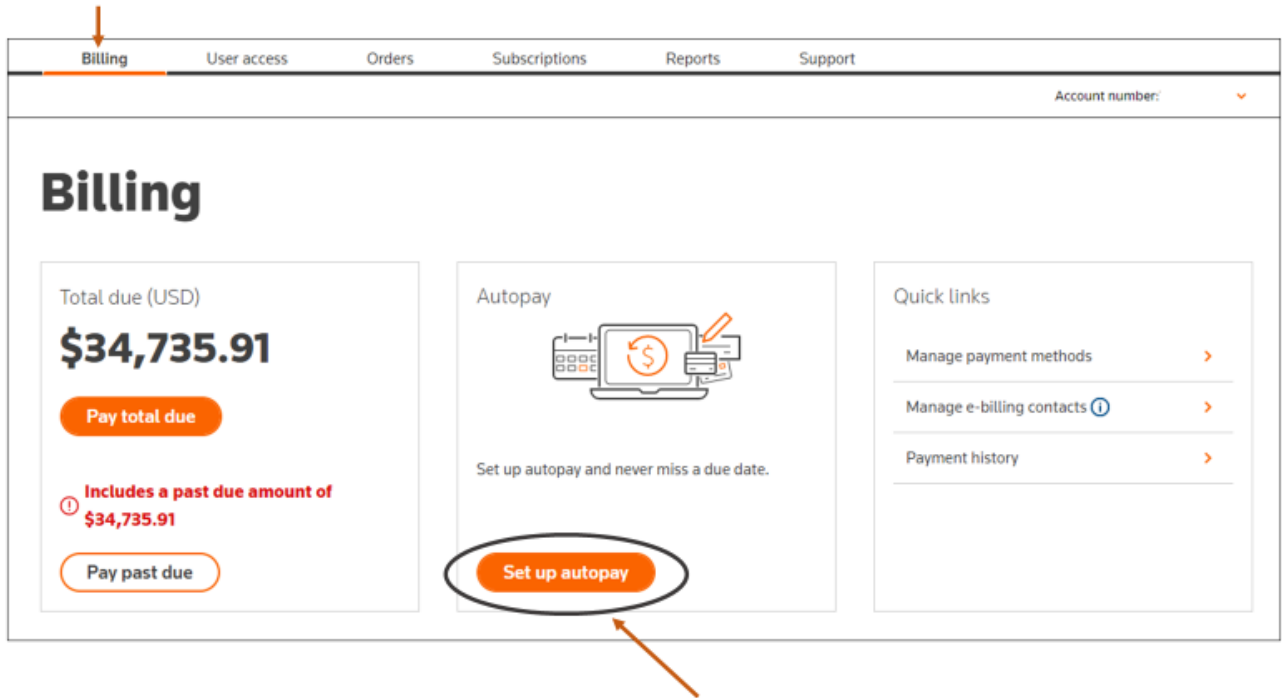


Next, choose a payment method and then click **Next**.

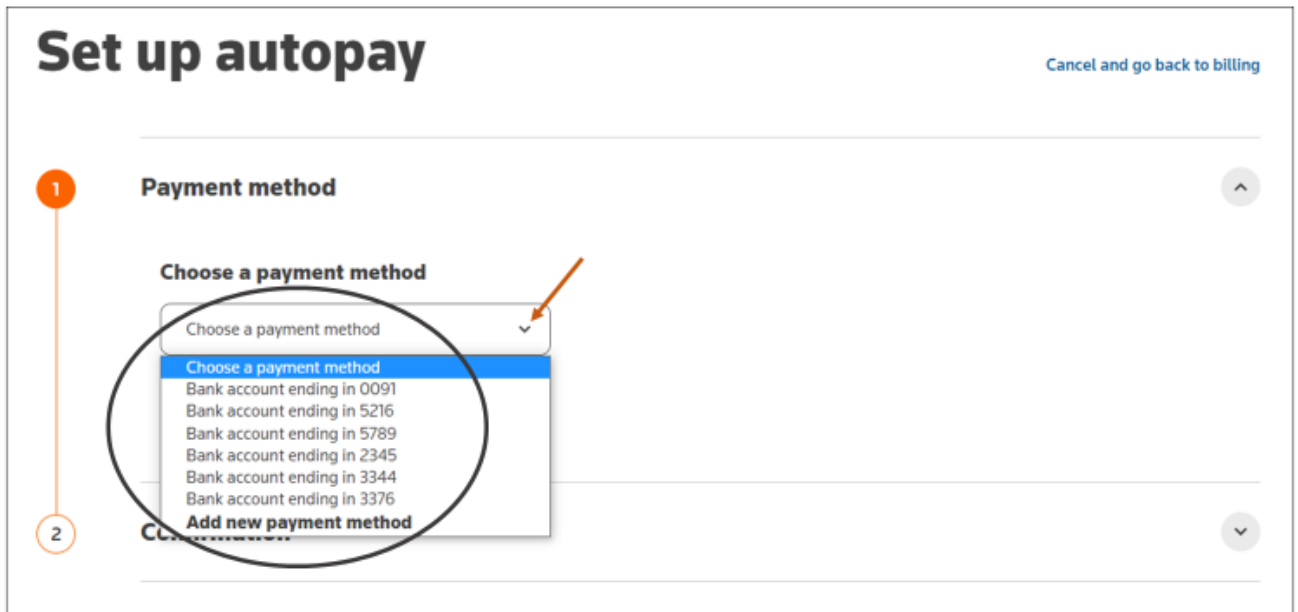


Set up Autopay

Navigate to the **Billing** tab and click **Set up autopay** from center box.



Then, click on the carrot next to Choose payment method and either select a saved payment method or add a new payment method.



To add a new payment method, click add new payment method. Then, select either **Bank account** or **Credit card**, and click **Next**.

Set up autopay [Cancel and go back to billing](#)

1 **Payment method**

Choose a payment method

Add new payment method

Bank account **Credit card**

All fields required.

Routing number: Enter routing number

Account number: Enter account number

Routing number: 123456789

Account number: 0012345678900

Next Cancel

2 **Confirmation**

Set up autopay

1 **Payment method**

Choose a payment method

Add new payment method

Bank account **Credit card**

All fields required.

Name on card

Card number

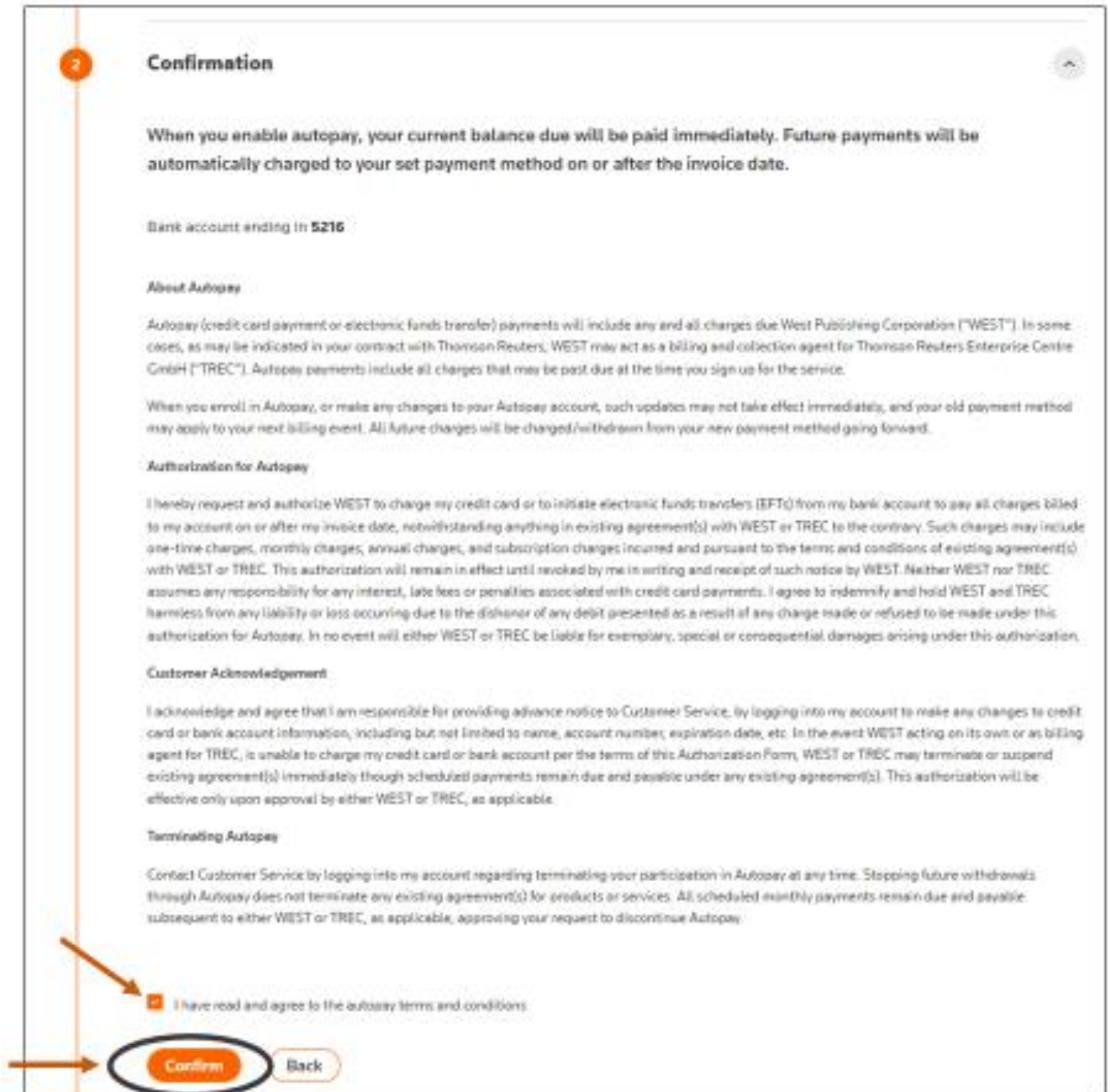
Expiration month (MM): Months

Expiration year (YYYY): Year

Security code: 3 or 4 digit code on the back or front of card

Next Cancel

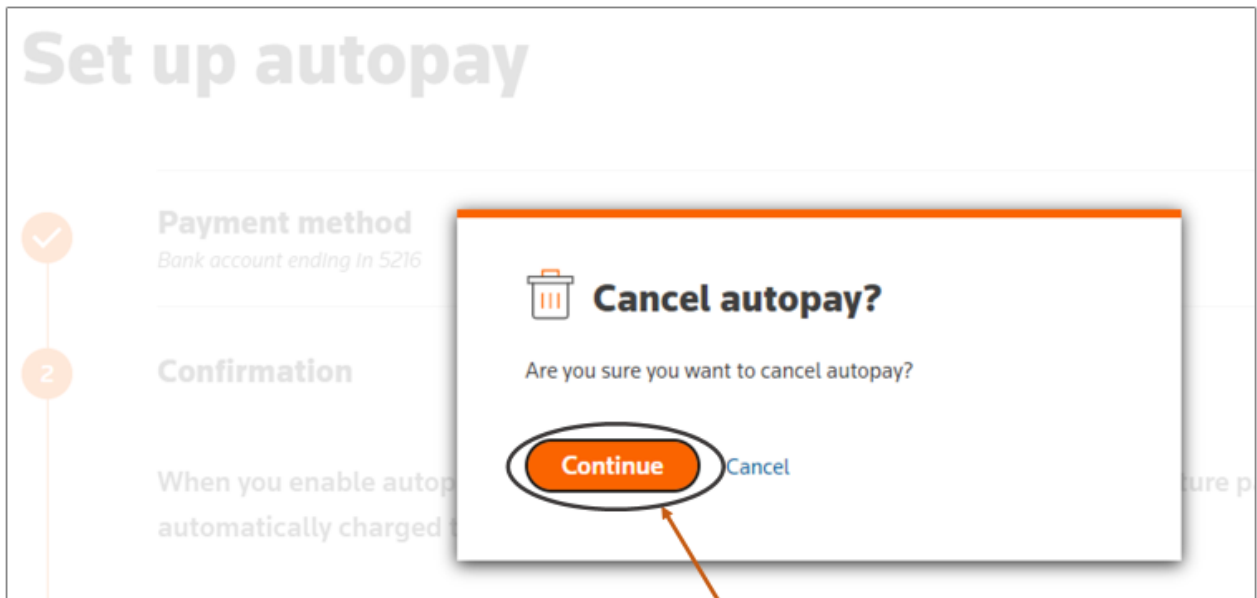
After choosing the payment method, click on the acknowledgment box. Then click **Confirm**.



If you would like to cancel the autopay signup process, from the Setup autopay page, click **Cancel and go back to billing** on the top right side.

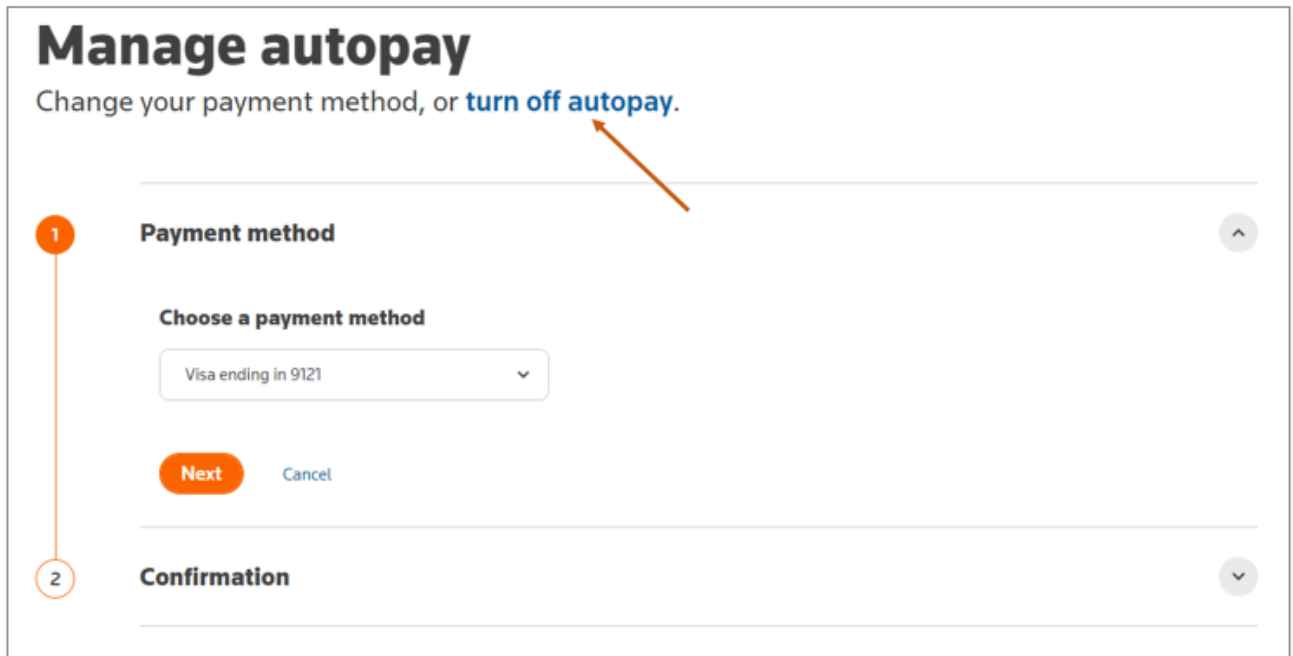


Next, click **Continue**.

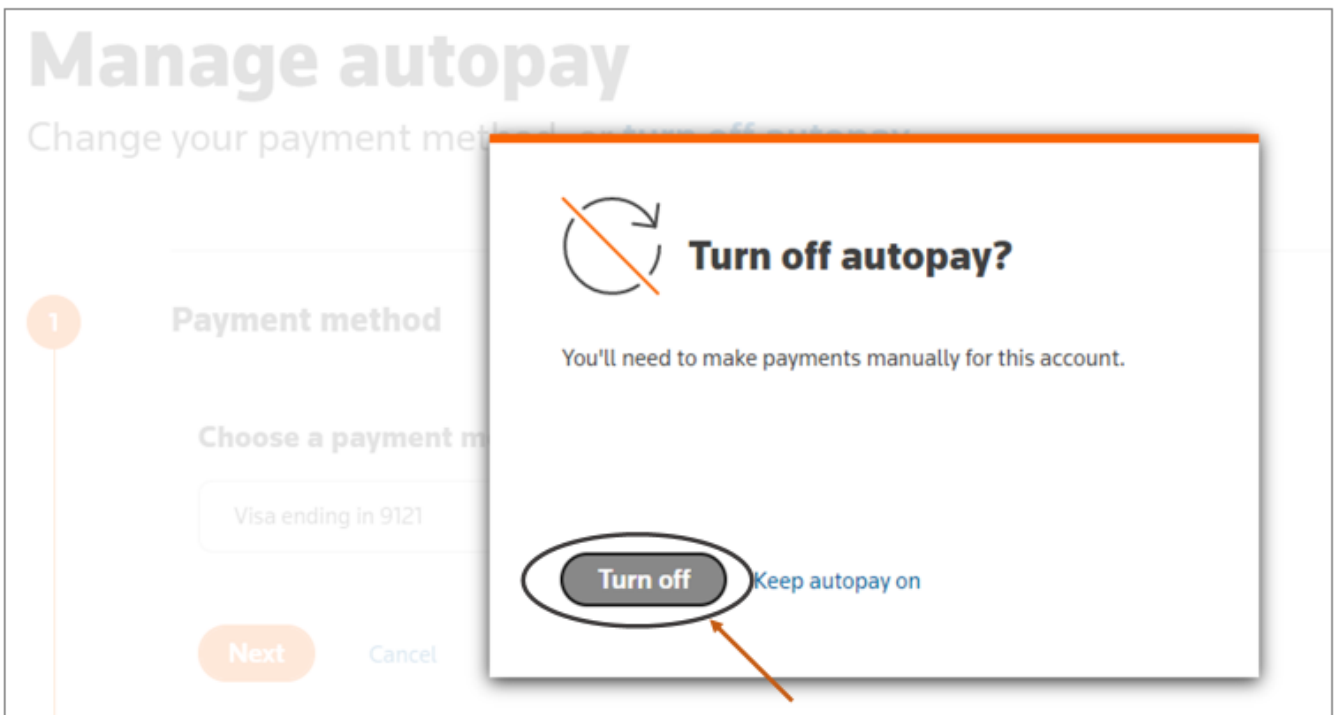


Turn Off Autopay

To turn off autopay that already exists, click **turn off autopay** in the Manage autopay box.



Then, click **Turn off**.



Dispute an Invoice

To dispute an invoice, navigate to the **Billing** tab, then either click the invoice number from the **Open** tab or click **Actions** and then select **View details**.

The screenshot displays the 'Billing' section of a self-service portal. At the top, there is a navigation bar with tabs for 'Billing', 'User access', 'Orders', 'Subscriptions', 'Reports', and 'Support'. The 'Billing' tab is selected and highlighted with an orange arrow. Below the navigation bar, the 'Billing' title is prominently displayed. The main content area is divided into three columns. The left column shows the 'Total due (USD)' as '\$34,583.60' with a 'Pay total due' button. Below this, it indicates 'Includes a past due amount of \$34,482.90' with a 'Pay past due' button. The middle column features an 'Autopay' section with an icon of a laptop and a calendar, and a 'Set up autopay' button. The right column contains 'Quick links' for 'Manage payment methods', 'Manage e-billing contacts', and 'Payment history'. Below these sections, there are two tabs: 'Open' (selected) and 'Paid invoices'. Under the 'Open' tab, there is a section for 'Invoices and credits' with a link 'Where is my Invoice PDF?'. A table lists three invoices, with the first one being 'Past due'. An 'Export open invoice list to file' button is located to the right of the table. A dropdown menu is open over the first invoice, showing options: 'Pay invoice', 'View details', and 'Download invoice'. The 'View details' option is circled in black, and an orange arrow points to it from the right. Another orange arrow points to the 'Billing' tab at the top left.

Invoice	Title	Invoice date	Due by	Status	Amount	Actions
<input type="checkbox"/> 0845543364	Subscription	Dec 01, 2021	Dec 11, 2021	❗ Past due		<ul style="list-style-type: none"> Pay invoice View details Download invoice
<input type="checkbox"/> 0844389694	Partial Balance	Dec 07, 2021	May 04, 2021	❗ Past due		<ul style="list-style-type: none"> Balance remaining Actions
<input type="checkbox"/> 0845459756	Partial Balance	Jan 24, 2022	Dec 08, 2021	❗ Past due	\$3,367.88	<ul style="list-style-type: none"> Actions

Next, click Report a problem.

[← Back to billing](#)

Invoice 084554

[Download invoice \(PDF\)](#)

Selected amount (USD)
\$154.28

[Pay amount](#)

Details

Total amount: **\$154.28**
Due by: **Dec 11, 2021**
Invoice issued: **Dec 01, 2021**

Account name:
Account number:

610 OPPERMAN DR,
EAGAN, VT, USA,
32103

[Report a problem](#)

<input checked="" type="checkbox"/> A PRACTICAL GUIDE TO PREVENTING LEGAL MALPRACTICE ONE HARDBOUND VOL AND SUPP SUB Posting date: Dec 01, 2021 Posting number: 6145	Total: \$100.70	<input type="button" value="v"/>
<input checked="" type="checkbox"/> # LIBRARY MAINTENANCE AGREEMENT SUB Posting date: Dec 01, 2021 Posting number: 6145	Total: \$34.75	<input type="button" value="v"/>
<input checked="" type="checkbox"/> # LIBRARY MAINTENANCE AGREEMENT SUB Posting date: Dec 01, 2021 Posting number: 6145	Total: \$13.05	<input type="button" value="v"/>
<input checked="" type="checkbox"/> # LIBRARY MAINTENANCE AGREEMENT SUB Posting date: Dec 01, 2021 Posting number: 6145	Total: \$5.78	<input type="button" value="v"/>

Complete the relevant information in the form. Note the following: 1) a phone number is required and must include the country code (i.e., +1 for US), and just numbers, 2) your email address is prepopulated and cannot be changed here, and 3) for **Type of problem**, click the carrot and select the most relevant choice. Then click **Submit**.

← Back to billing

Problem on invoice 084554

Briefly describe the problem, and attach any relevant files. We'll create a support ticket from the info that you provide here.

Phone number
We'll only use this to contact you about the problem that you're reporting.
Enter your phone number

Email

Receive email notifications when an agent comments on your ticket. (Optional)

Type of problem
Select one

Description
Share the details of the problem so that we can assign your ticket to the right service representative.

Attach files to your message (Optional)
Drop files to upload
Choose files
7 MB limit per upload

Type of problem
Select one

- I already paid this
- I have already cancelled this
- I did not want to renew
- The price is incorrect
- I need an update to my invoice
- Other

Submit

Next, if prompted, click **Update** or **Don't update** phone number from the popup window.

Update phone number?

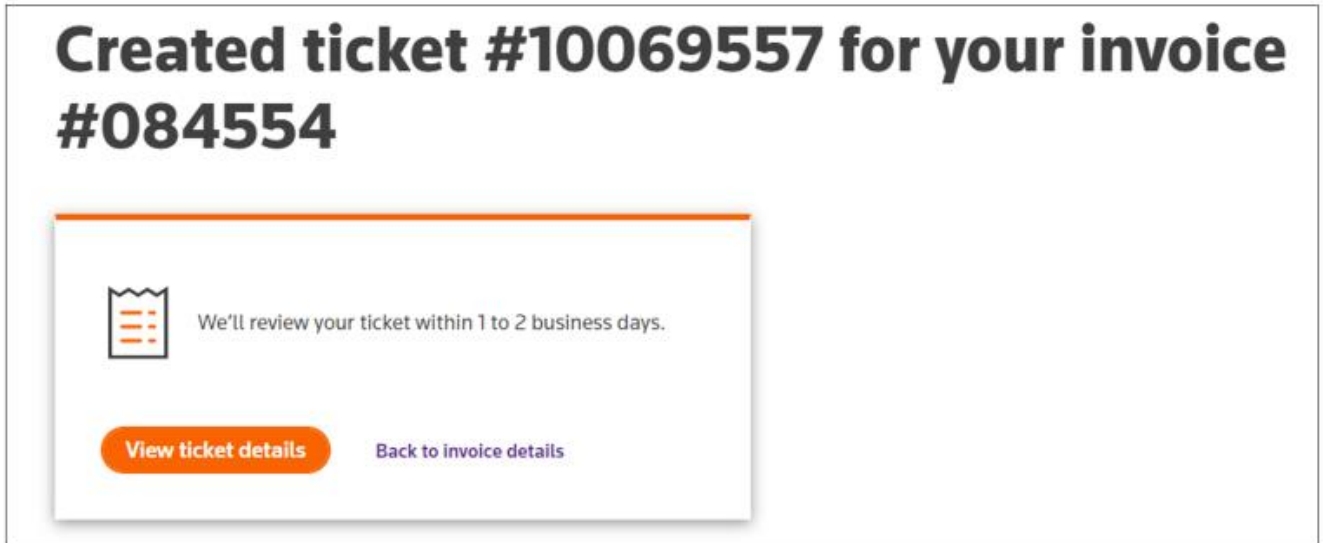
The current phone number in your profile is:

Do you want to update your phone number to:

+1

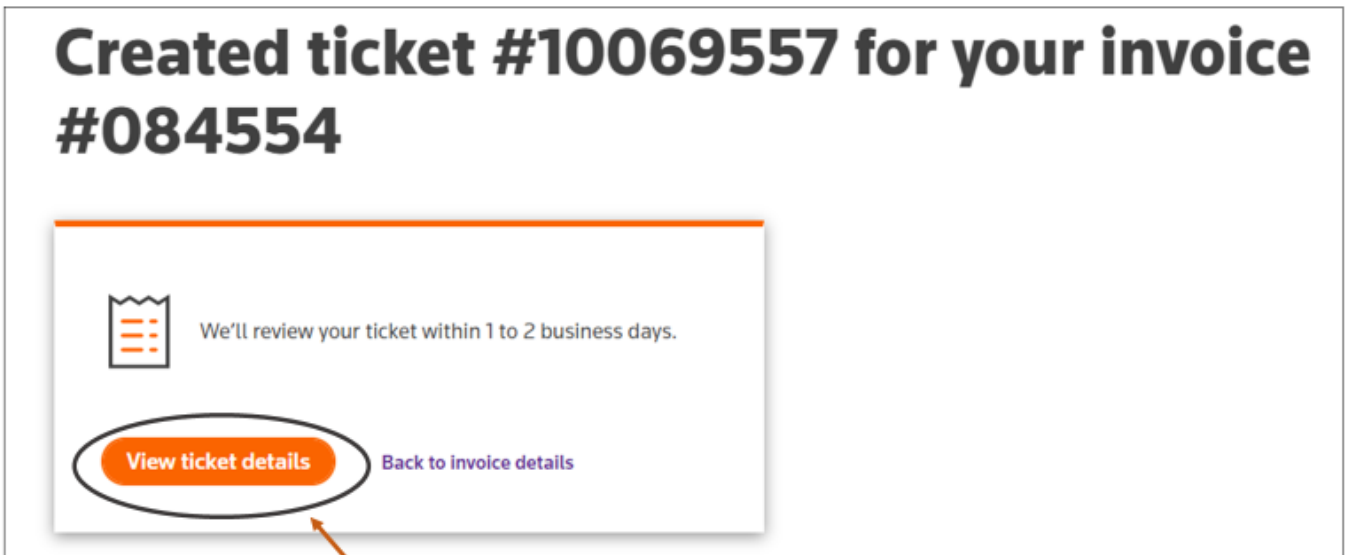
Update Don't update

Next, you will see a confirmation box acknowledging that your ticket was submitted.



Once you create an invoice ticket, there are two ways to view it.

- 1) View invoice ticket details by clicking on the View ticket details button in the Created ticket popup box after reporting a problem.



2) Navigate to the **Support** tab. Next, click on the ticket you want to view from the **Open tickets** tab.

Account number: _____

Support

Quick links

- [Westlaw Edge Training](#)
- [Westlaw Classic Training](#)
- [Practical Law Training](#)
- [Knowledge Center](#)

Submit tickets to get help faster

- Use tickets for issues related to your account or your orders. For help using products, go to [Product Support](#).
- View and track all your tickets here, including tickets we create when you call or email us.
- An agent will respond in 1 to 2 business days. You can opt in to updates via email when you submit a ticket.

[Submit a ticket](#)

Open tickets | Resolved tickets

Open ticket details

Subject	Status	Case number	Date submitted	Ticket category	Last updated
Problem on invoice 084554	Work in progress	10069557	6/3/2022	Billing, payments, refunds, and returns	6/3/2022

The open ticket will be similar to the one on the following page.

← Back to all tickets



Problem on invoice 084554

Created on Jun 3, 2022 • 3:54 pm

Ticket details



Status

Work in progress

Case number

10069267

Last updated

Jun 3, 2022 • 4:56 pm

Category

Billing, payments, refunds, and returns

Reason for submitting ticket

I need help with an invoice.

Ticket description

This is just a test - no need to contact.

Receive email notifications when an agent comments on your ticket. (Optional)

Attachments (0)



Send more details

Send a message to your customer service representative.

Ticket description (Optional)

How can we help?

Attach files to your message (Optional)

Drop files to upload

Choose files

7 MB limit per upload

Send



Conversation history



Leslie, customer service representative

Jun 3, 2022 • 4:54 pm

This is test case, no further action needed.

To view resolved tickets, navigate to the **Support** tab and click the **Resolved tickets** tab.

Billing User access Orders Subscriptions Reports **Support** Account number:

Support

Submit tickets to get help faster

- Use tickets for issues related to your account or your orders. For help using products, go to [Product Support](#).
- View and track all your tickets here, including tickets we create when you call or email us.
- An agent will respond in 1 to 2 business days. You can opt in to updates via email when you submit a ticket.

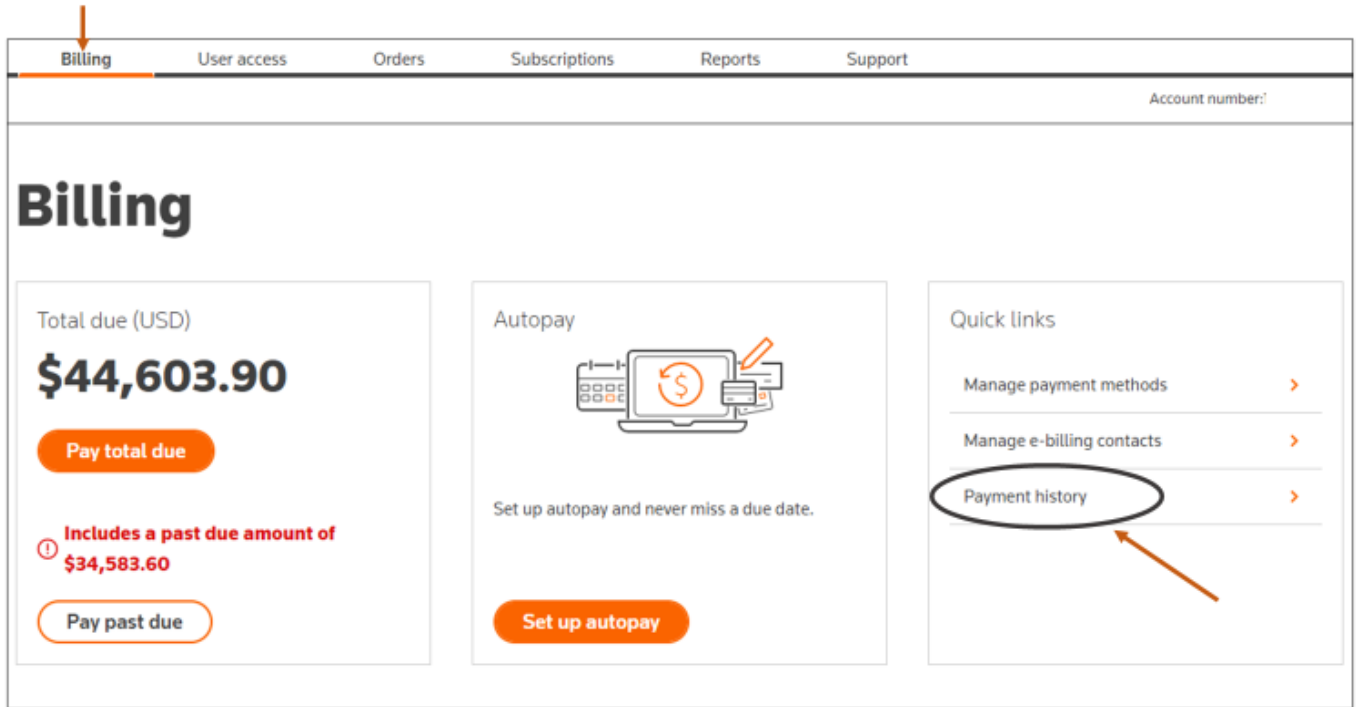
[Submit a ticket](#)

Open tickets **Resolved tickets**

You don't have any resolved tickets.

View Payment History

Navigate to the **Billing** tab and select **Payment history**. Payment history is available for the previous 13 months, including any full or partial payments made.



A sample Payment history appears below.

[← Back to billing](#)

Payment history

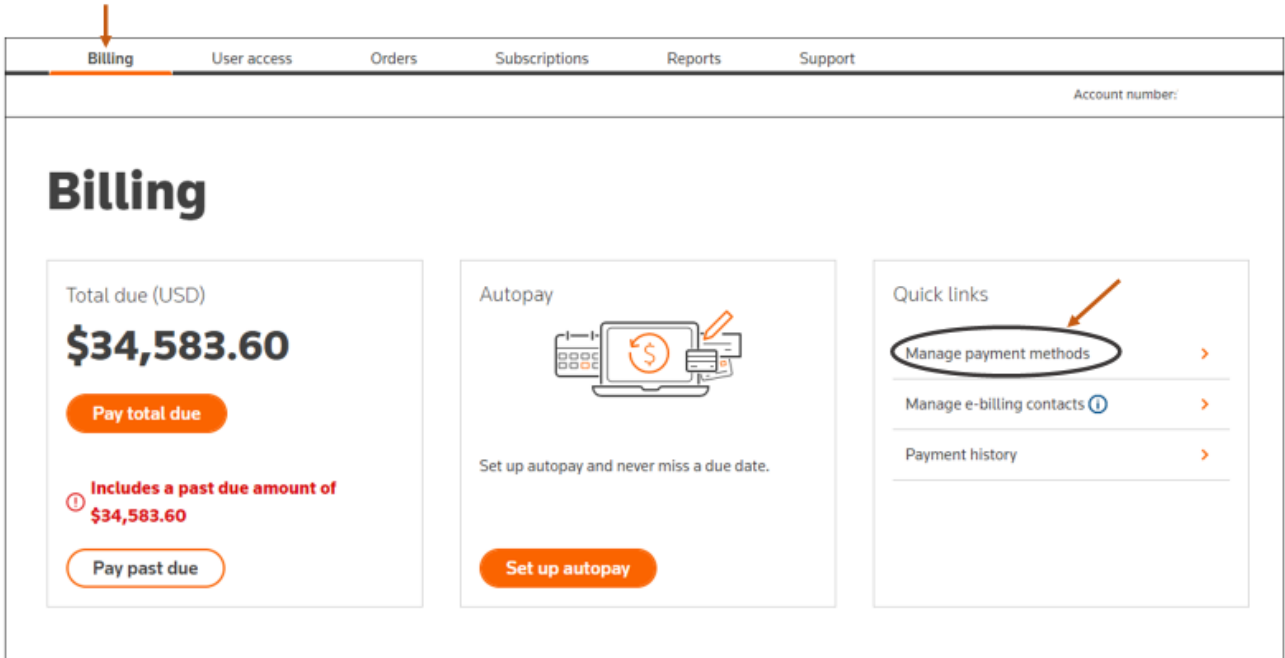
Payments made in the last 13 months are displayed below.

Payment history for 10043 Export payment history to file

Payment date	Invoice number	Payment method	Amount (USD)
May 20, 2022	0844876642	Bank account XXXXXXXX0137	\$154.28
Apr 11, 2022	0844389694	Visa ending in 5861	\$5.78 *Partial payment
Mar 28, 2022	0845728929	Bank account XXXXXXXX0137	\$154.28
Mar 27, 2022	0844389694	Visa ending in 8432	\$32.12 *Partial payment
Dec 07, 2021	AUTO WRITE-OFF	CREDIT	\$0.01 *Partial payment
Oct 07, 2021	0844389694	Visa ending in 3298	\$13.06 *Partial payment
Oct 07, 2021	0845043024	Visa ending in 3298	\$13.05 *Partial payment
Sep 12, 2021	0844389694	Visa ending in 8432	\$5.78 *Partial payment
Sep 12, 2021	0844716448	Visa ending in 8432	\$13.05 *Partial payment

Manage Payment Methods

Navigate to the **Billing** tab and click **Manage payment methods** from the Quick links box on the right side.



Add a Payment Method

From the Management payment method page, click **Add payment method**.

← Back to billing

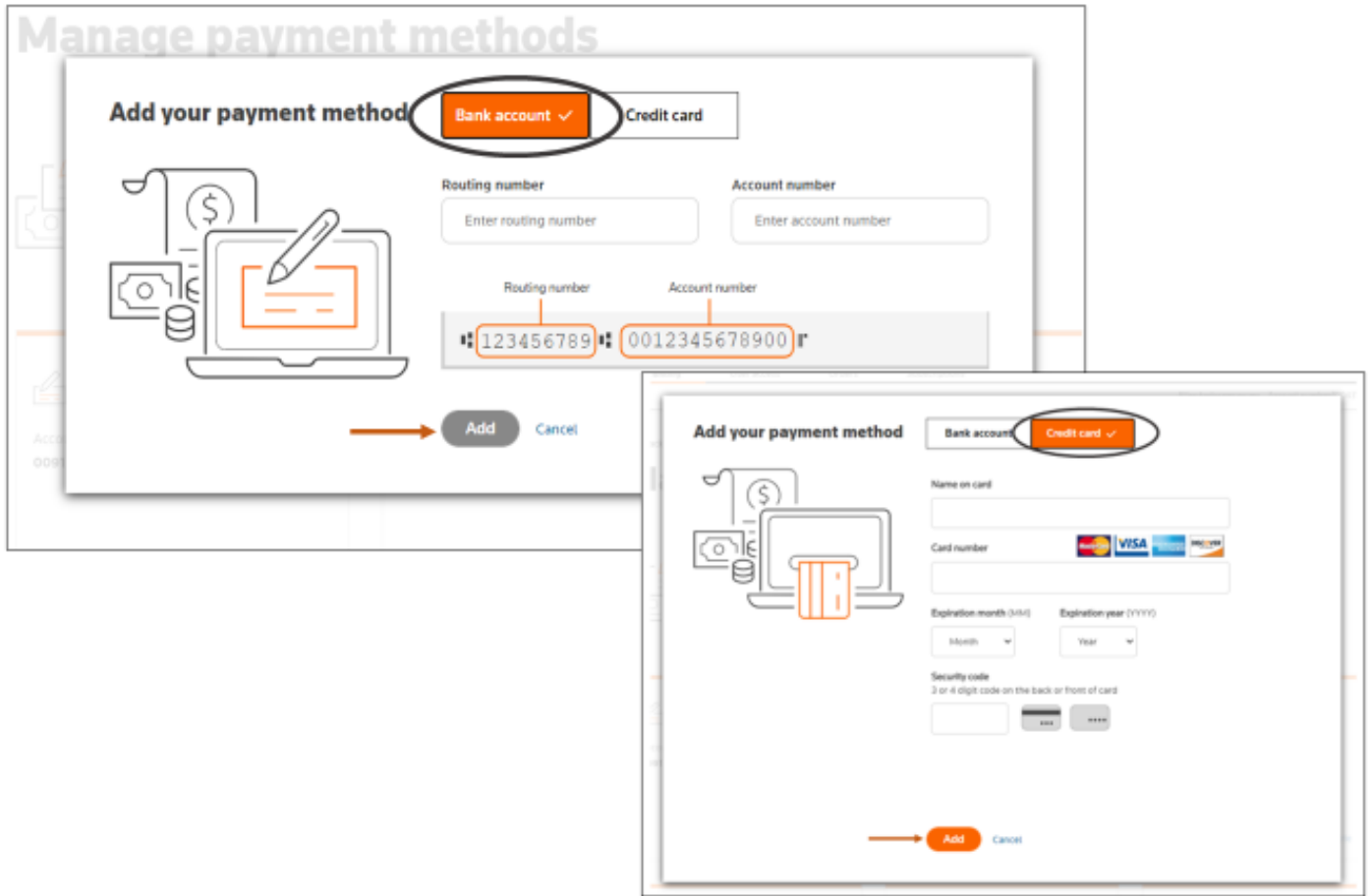
Manage payment methods

View and update your payment methods
Select **Add payment method** to add a bank account or credit card to your account.

Add payment method

 Bank account Account ending in 0091 Delete	 Bank account Account ending in 5216 Delete	 Bank account Account ending in 5789 Delete
 Bank account Account ending in 2345 Delete	 Bank account Account ending in 3344 Delete	 Bank account Account ending in 3376 Delete

Add your payment method page, select either Bank account or Credit card. Then, input the required information. Next, click **Add**.



Save a Payment Method

From Make a payment page, select **Save payment method**. Then, click **Next**.

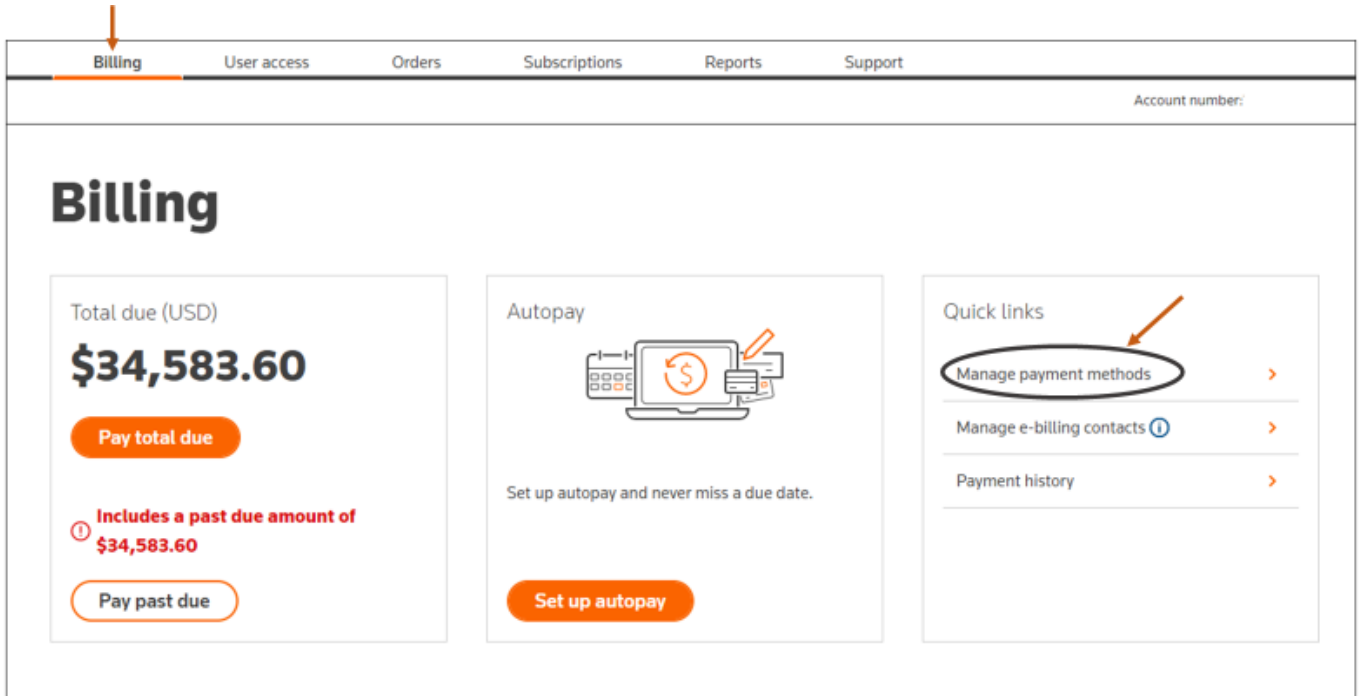
The image displays two sequential screenshots of the 'Make a payment' user interface. Both screenshots feature a title bar with 'Make a payment' on the left and a link 'Cancel and go back to billing' on the right. A vertical orange line on the left side of each form is marked with a circled '1' at the top and a circled '2' at the bottom, indicating the current step in the process.

Left Screenshot (Step 1): The 'Payment method' section shows a dropdown menu for 'Add new payment method'. Two buttons are visible: 'Bank account' (highlighted in orange with a checkmark) and 'Credit card'. Below these, a note states 'All fields required.' There are two input fields: 'Routing number' (containing '123456789') and 'Account number' (containing '0012345678900'). A 'Save payment method' checkbox is circled in black. Below it are 'Next' and 'Cancel' buttons. An orange arrow points from the 'Next' button to the circled '2' at the bottom of the vertical line.

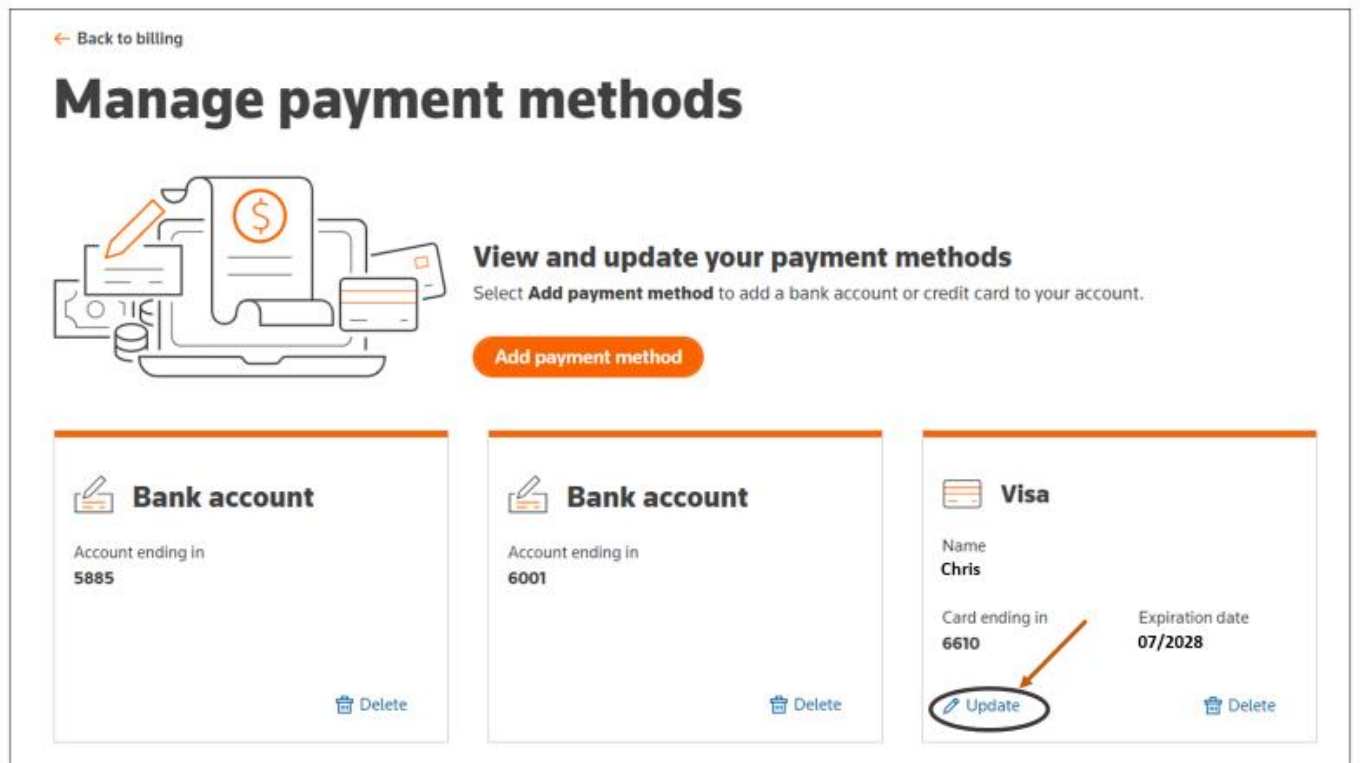
Right Screenshot (Step 2): The 'Payment method' section shows the 'Credit card' button highlighted in orange with a checkmark. Below it, the 'Name on card' field is empty. The 'Card number' field contains logos for Mastercard, VISA, American Express, and Discover. Below this are 'Expiration month (MM)' and 'Expiration year (YYYY)' dropdown menus. The 'Security code' field is empty, with a note '3 or 4 digit code on the back or front of card'. A 'Save payment method' checkbox is circled in black. Below it are 'Next' and 'Cancel' buttons. An orange arrow points from the 'Next' button to the circled '2' at the bottom of the vertical line.

Edit a Payment Method

Navigate to the **Billing** tab and click **Manage payment methods** from the Quick links box on the right side.



Next, click **Update** at the bottom left of the payment method you want to update.



Then, enter any necessary changes and click **Update**.

Update your credit card

Name on card

Card number
 DISCOVER MARQUEE AMERICAN EXPRESS VISA

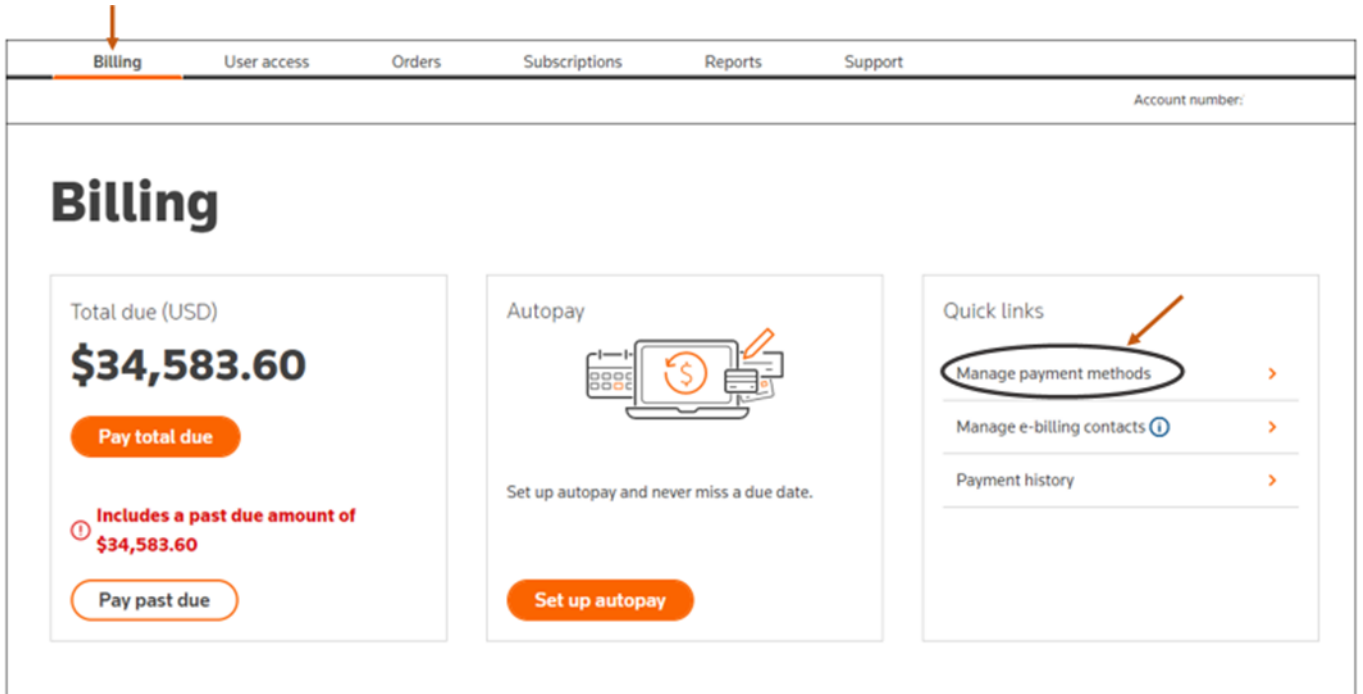
Expiration month (MM) Expiration year (YYYY)

Security code
3 or 4 digit code on the back or front of card

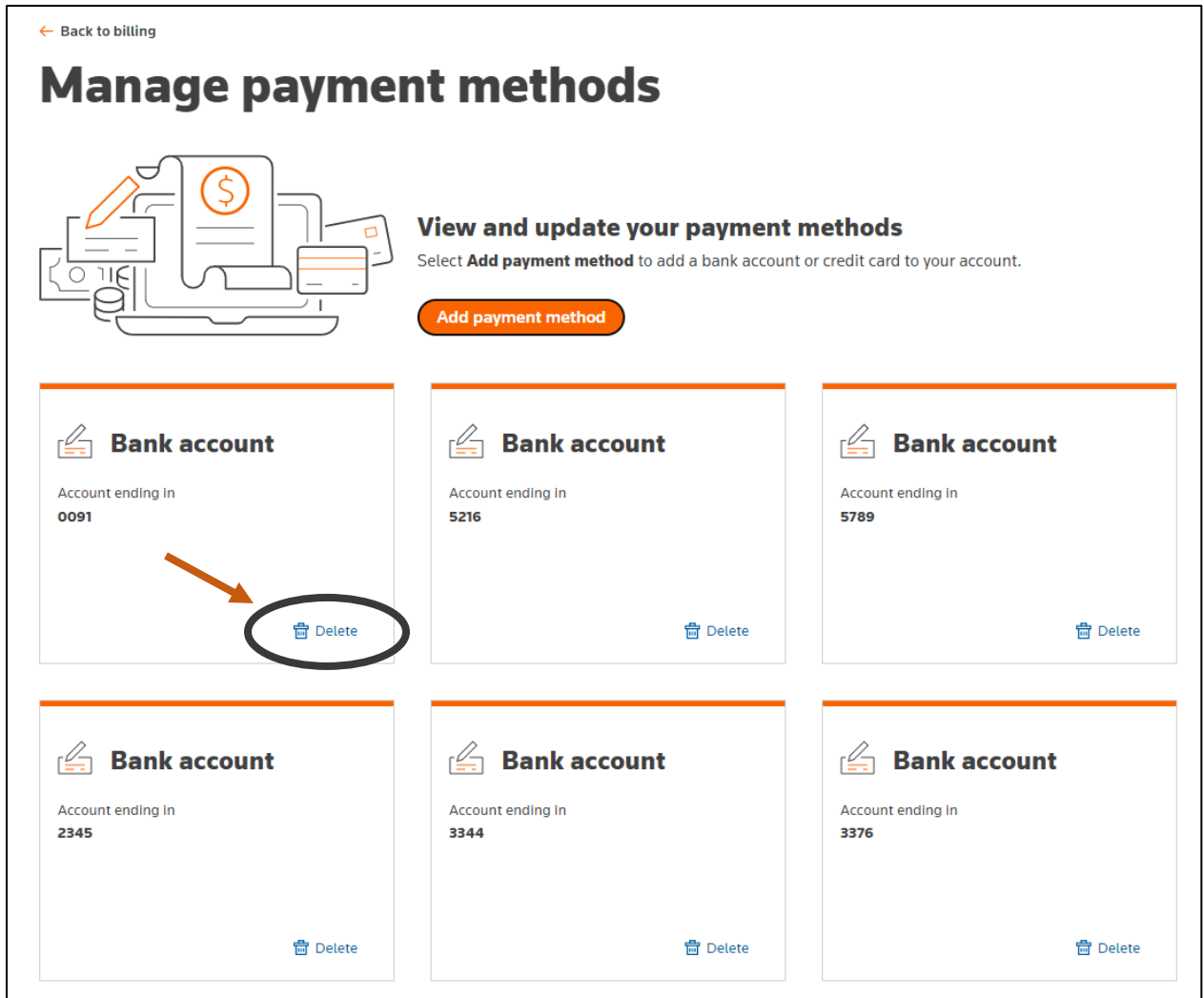
Update Cancel

Delete a Payment Method

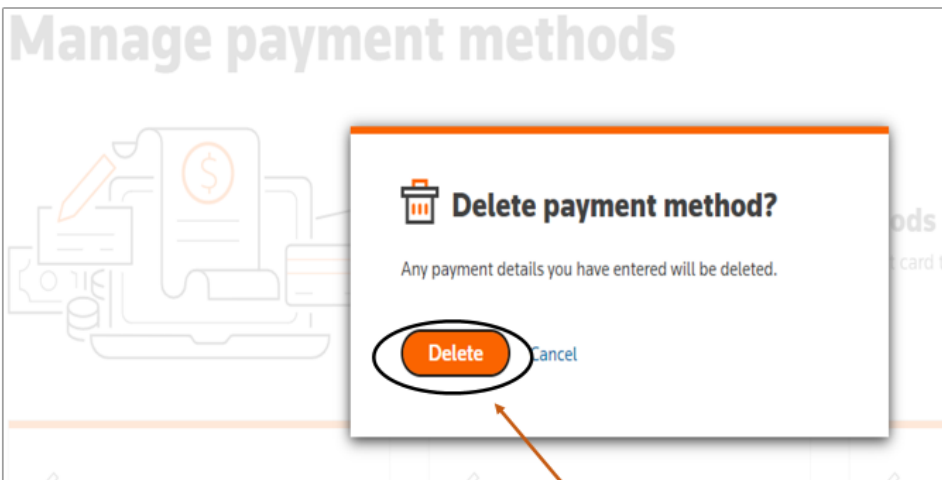
Navigate to the **Billing tab** and click **Manage payment methods** from the Quick links box on the right side.



Next, click **Delete** from the bottom left box of whichever payment method you want to remove.

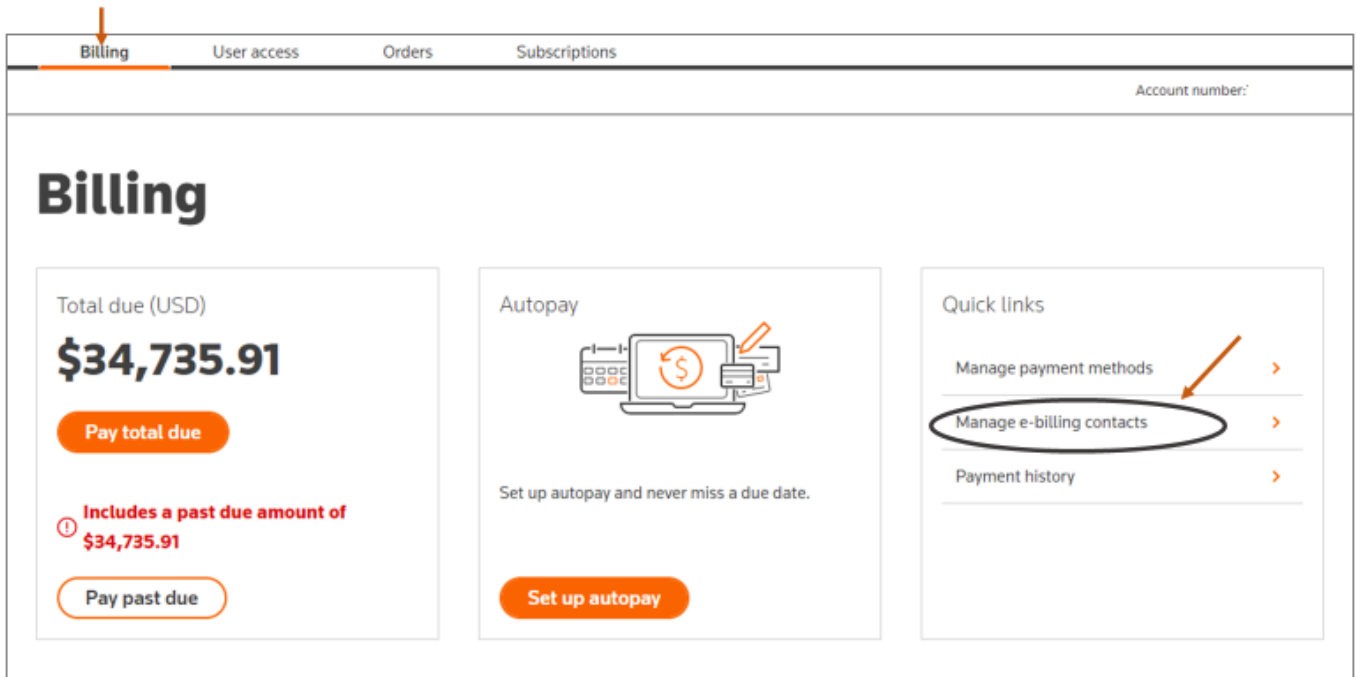


Then, click **Delete** in the popup window.



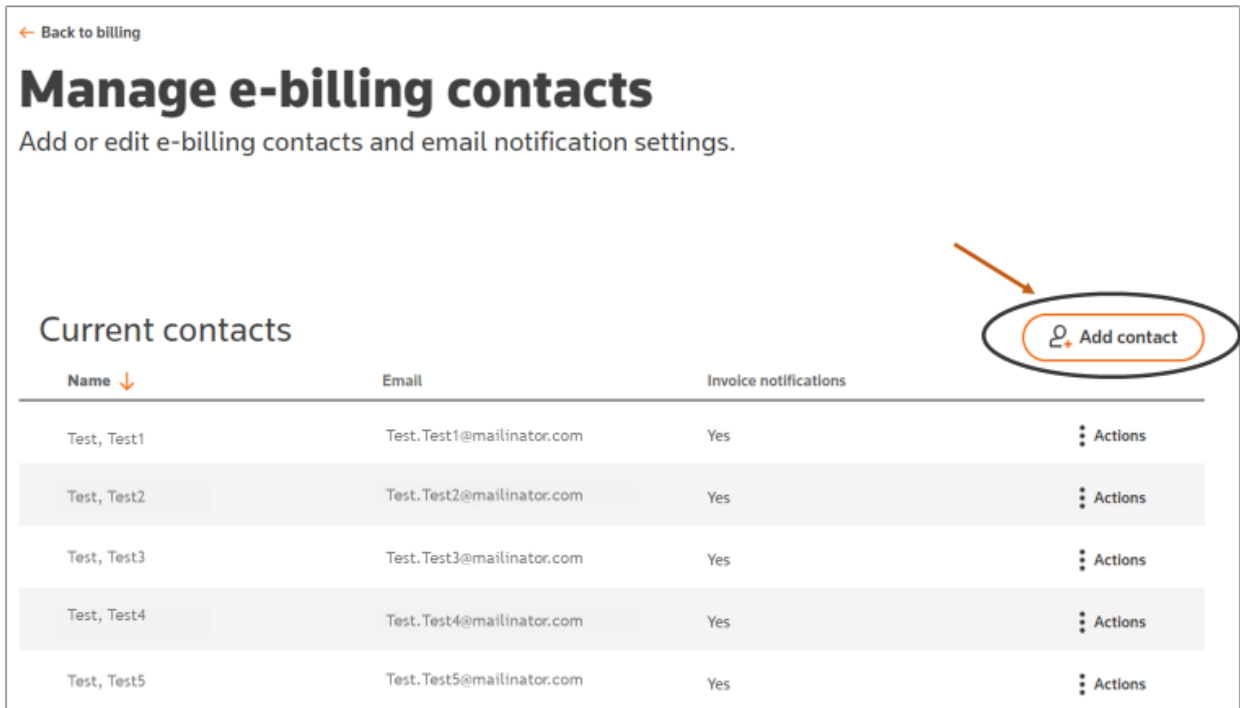
Manage e-Billing Contacts

Navigate to the **Billing** tab and select **Manage e-billing contacts**.



Add an e-Billing Contact

From the Manage e-billing contacts page, click **Add contact**.



Add a first name, last name, and email address. Then, click **Add contacts**.

← Back to manage e-billing contacts

Add contacts

Enter contact information

🔗 Contact 1:

First name:

Last name:

Email:

+ Add another contact

Add contacts Cancel

To add additional contacts, click **Add another contact**. Then, add a first name, last name, and email address for each Contact. Next, click **Add contacts**.

← Back to manage e-billing contacts

Add contacts

Enter contact information

🔗 Contact 1:

First name:

Last name:

Email:

+ Add another contact

Add contacts Cancel

← Back to manage e-billing contacts

Add contacts

Enter contact information

🔗 Contact 1:

First name:

Last name:

Email:

ⓘ Enter a first name.

🔗 Contact 2:

First name:

Last name:


Email:

+ Add another contact

Add contacts Cancel

After adding contacts, you will see a confirmation box similar to the one below.

Contacts added



We've added these contacts to receive e-billing notifications:

Sarah Jones

[Manage e-billing contacts](#) [Back to billing](#)

Edit an e-Billing Contact

From the Manage e-billing contacts page, click **Actions** for the desired user and then select **Edit**.

← Back to billing

Manage e-billing contacts

Add or edit e-billing contacts and email notification settings.

Current contacts + Add contact

Name ↓	Email	Invoice notifications	
Test, Test1	Test.Test1@mailinator.com	Yes	⋮ Actions
Test, Test2	Test.Test2@mailinator.com	Yes	⋮ Actions
Test, Test3	Test.Test3@mailinator.com	Yes	⋮ Actions
Test, Test4	Test.Test4@mailinator.com	Yes	⋮ Actions
Test, Test5	Test.Test5@mailinator.com	Yes	⋮ Actions

Next, make any changes to the first name, last name, or email address of the user and click **Save**.

← Back to manage e-billing contacts

Edit e-billing communications

Edit contact info

First name

Last name

Email

Save Cancel


Delete an e-Billing Contact

From the Manage e-billing contacts page, click **Actions** for the desired user and then select **Delete**.

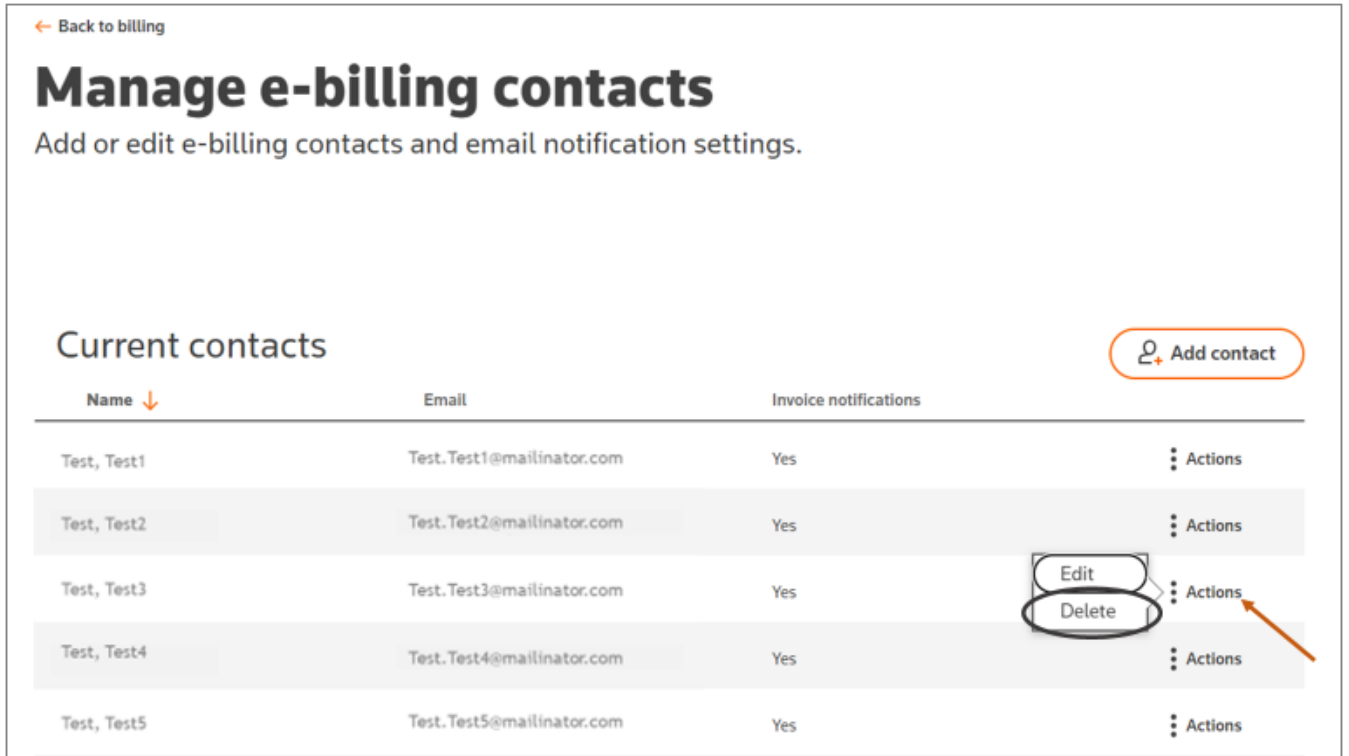
← Back to billing

Manage e-billing contacts

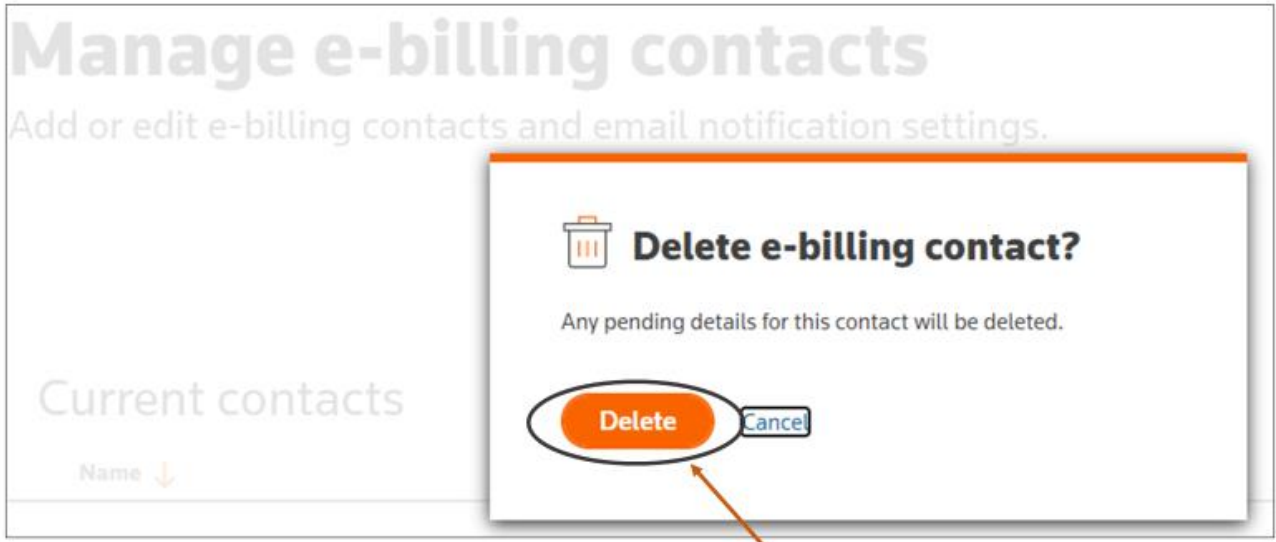
Add or edit e-billing contacts and email notification settings.

Current contacts  Add contact

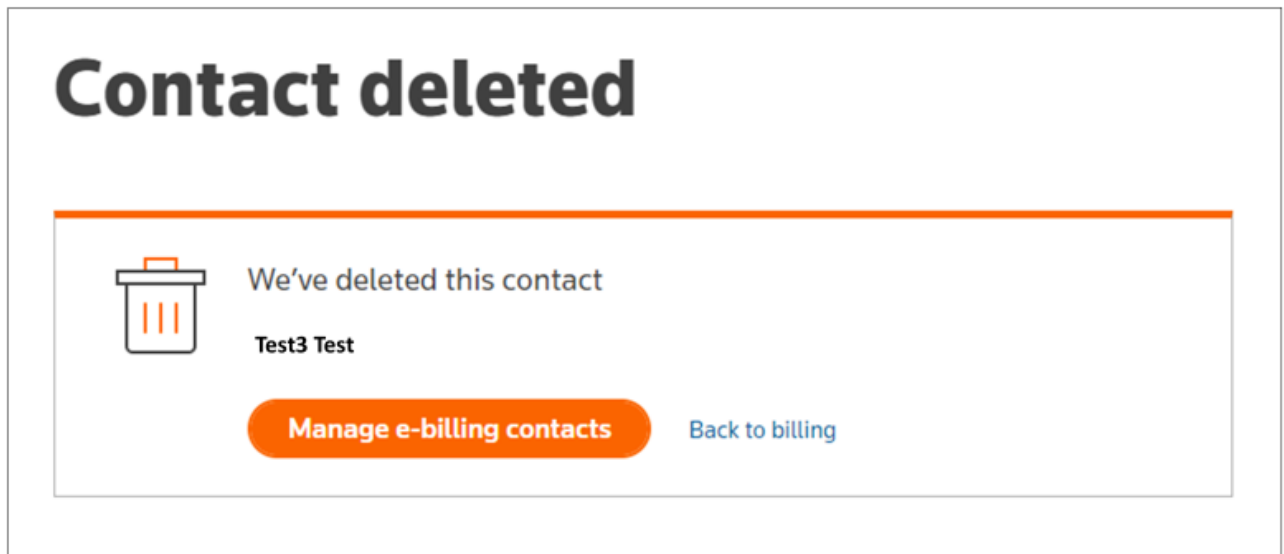
Name ↓	Email	Invoice notifications	
Test, Test1	Test.Test1@mailinator.com	Yes	⋮ Actions
Test, Test2	Test.Test2@mailinator.com	Yes	⋮ Actions
Test, Test3	Test.Test3@mailinator.com	Yes	<div style="display: flex; align-items: center; gap: 5px;"> <div style="border: 1px solid gray; border-radius: 5px; padding: 2px 5px;">Edit</div> <div style="border: 1px solid gray; border-radius: 5px; padding: 2px 5px;">Delete</div> <div style="text-align: right;">⋮ Actions</div> </div>
Test, Test4	Test.Test4@mailinator.com	Yes	⋮ Actions
Test, Test5	Test.Test5@mailinator.com	Yes	⋮ Actions



Then, click **Delete** from the popup window.



After deleting a contact, you will see a confirmation box similar to the one below.



USER MANAGEMENT TASKS

View Users

View Product Users

To view product users (users without administrative access), navigate to the **User access** tab and click on the **Users** tab.

The screenshot shows the 'User access' interface. At the top, there is a navigation bar with tabs: Billing, **User access**, Orders, Subscriptions, Reports, and Support. An arrow points to the 'User access' tab. Below the navigation bar, there is a sub-navigation area with 'Users' and 'Admins' tabs. An arrow points to the 'Users' tab. To the right of these tabs are two buttons: 'Export list to file' and 'Invite users'. Below this is a search bar with a 'Filter' icon and a search input field labeled 'Enter name'. The main content area is titled 'Users by account with product access' and contains a table with the following data:

Name	Products	Status	Position	Actions
<input type="checkbox"/> 123, Hello	Firm Central	Not registered	Technical	⋮
<input type="checkbox"/> 1234, Testaccount	Firm Central, Westlaw	Not registered	Non-attorney	⋮
<input type="checkbox"/> Adam, Testing	None	Not registered	Attorney	⋮

View Admin Users

To view Administrators (users with administrative access), navigate to the **User access** tab and click on the **Admins** tab.

The screenshot shows the 'User access' section of a self-service portal. At the top, there is a navigation bar with tabs for 'Billing', 'User access', 'Orders', 'Reports', and 'Support'. The 'User access' tab is active. Below this, there is a sub-navigation bar with 'Users' and 'Admins' tabs. The 'Admins' tab is selected and highlighted with an orange arrow. To the right of the sub-navigation bar is an 'Invite users' button. Below the sub-navigation bar is a search bar with the placeholder text 'Enter name' and a search icon. The main content area contains a table with the following data:

Name	Permissions	Status	Actions
12345, Testaccount	Billing, Manage Tickets, User Access, View Orders and Subscriptions	Not registered	⋮
Adam, Testing	Billing, Manage Orders and Subscriptions, User Access	Registered	⋮
Lee, Apple	Billing, Manage Orders and Subscriptions, User Access	Registered	⋮
Lee, Apple	Billing, Manage Orders and Subscriptions, User Access	Not registered	⋮
C, Skye	Billing, Manage Orders and Subscriptions, User Access	Not registered	⋮

Search for Product or Admin Users

Navigate to the **User access** tab and enter a name in the **Search** bar above the **Users** list (as in the first image) or the **Admins** list (as in the second image)) on the right side.

The screenshot shows the 'User access' page with the 'Users' tab selected. The search bar is highlighted with a red circle and an arrow pointing to it. The search bar contains the text 'Enter name'.

Name	Products	Status	Position	Actions
<input type="checkbox"/> K9, Sai9	Firm Central, Westlaw	Not registered	Non-attorney	⋮
<input type="checkbox"/> K9, Sai9	None	Not registered	Non-attorney	⋮
<input type="checkbox"/> Lee, Apple	Westlaw	Not registered	Contractor	⋮
<input type="checkbox"/> Maytest, Rose	None	Not registered	Analyst	⋮
<input type="checkbox"/> Newusertestemail, Alice	None	Not registered	Attorney	⋮
<input type="checkbox"/> P, Sadie Admin	Westlaw	Not registered	Contractor	⋮

The screenshot shows the 'User access' page with the 'Admins' tab selected. The search bar is highlighted with a red circle and an arrow pointing to it. The search bar contains the text 'Enter name'.

Name	Permissions	Status	Actions
12345, Testaccount	User Access, View Orders and Subscriptions	Not registered	⋮
Adam, Testing	Billing, Manage Orders and Subscriptions, User Access	Registered	⋮
Lee, Apple	Billing, Manage Orders and Subscriptions, User Access	Registered	⋮
Lee, Apple	Billing, Manage Orders and Subscriptions, User Access	Not registered	⋮
C, Skye	Billing, Manage Orders and Subscriptions, User Access	Not registered	⋮

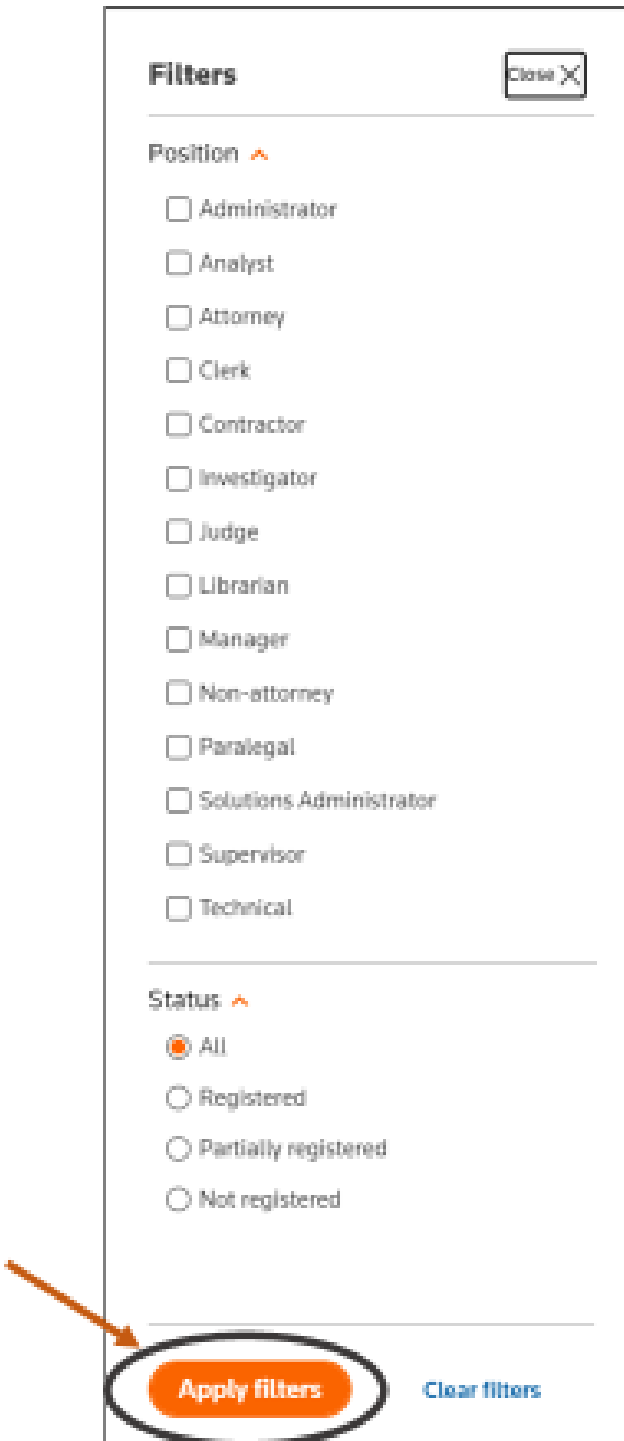
Filter Users

Navigate to the **User access** tab. Next, from the **Users** tab, click **Filter** to the left of the Search bar.

The screenshot shows the 'User access' section of a web portal. At the top, there are navigation tabs: 'Billing', 'User access' (highlighted with an orange arrow), 'Orders', 'Reports', and 'Support'. Below these is a search bar with the placeholder text 'Enter name' and a magnifying glass icon. To the left of the search bar is a 'Filter' button, which is circled in orange and has an orange arrow pointing to it. Above the search bar are two buttons: 'Export list to file' with a download icon and 'Invite users' with a plus icon. Below the search bar, there are two tabs: 'Users' (active) and 'Admins'. Below the tabs are two dropdown menus: 'Select' and 'Actions'. The main content area is titled 'Users by account with product access' and contains a table with the following columns: Name, Products, Status, Position, and Actions. The table lists six users with their respective details.

Name	Products	Status	Position	Actions
<input type="checkbox"/> K9, Sai9	Firm Central, Westlaw	Not registered	Non-attorney	⋮
<input type="checkbox"/> K9, Sai9	None	Not registered	Non-attorney	⋮
<input type="checkbox"/> Lee, Apple	Westlaw	Not registered	Contractor	⋮
<input type="checkbox"/> Maytest, Rose	None	Not registered	Analyst	⋮
<input type="checkbox"/> Newusertestemail, Alice	None	Not registered	Attorney	⋮
<input type="checkbox"/> P, Sadie Admin	Westlaw	Not registered	Contractor	⋮

Then, select the desired filters from the popup window and click **Apply filters**.



The **Users** list will now display only the filtered results, and the number of selected filters will display in parenthesis next to the **Filter** button.

Account number:

User access

Users Admins

Export list to file Invite users

Select | Actions

Filter(2) | Search

Users by account with product access

Name	Products	Status	Position	Actions
<input type="checkbox"/> Adam, Testing	None	Not registered	Attorney	
<input type="checkbox"/> Turner, Peter	Westlaw	Not registered	Attorney	
<input type="checkbox"/> C, Skye Admin	Firm Central	Not registered	Attorney	
<input type="checkbox"/> Newusertestemail, Alice	None	Not registered	Attorney	

Export List of Users to File

To export the list of users to an Excel file, navigate to the **User access** tab and click **Export list to file**.

User access

Account number:

Users Admins

Export list to file Invite users

Select Actions Filter Search Enter name

Users by account with product access

Name	Products	Status	Position	Actions
<input type="checkbox"/> 123, Hello	Firm Central, Westlaw	Not registered	Technical	⋮
<input type="checkbox"/> 12345, Testaccount Admin	Firm Central, Westlaw	Not registered	Non-attorney	⋮
<input type="checkbox"/> Adam, Testing	None	Not registered	Attorney	⋮
<input type="checkbox"/> Admin1202, Test1202	Firm Central, Westlaw	Not registered	Administrator	⋮
<input type="checkbox"/> Asx, Axa	Firm Central	Not registered	Analyst	⋮
<input type="checkbox"/> Turner, Peter	Westlaw	Not registered	Attorney	⋮
<input type="checkbox"/> C, Skye Admin	Firm Central	Not registered	Attorney	⋮

You can also click the **Export list to file** button after filtering to export the filtered list of users to an Excel file.

User access

Users | Admins

Export list to file | Invite users

Filter(2) | Search Enter name

Users by account with product access

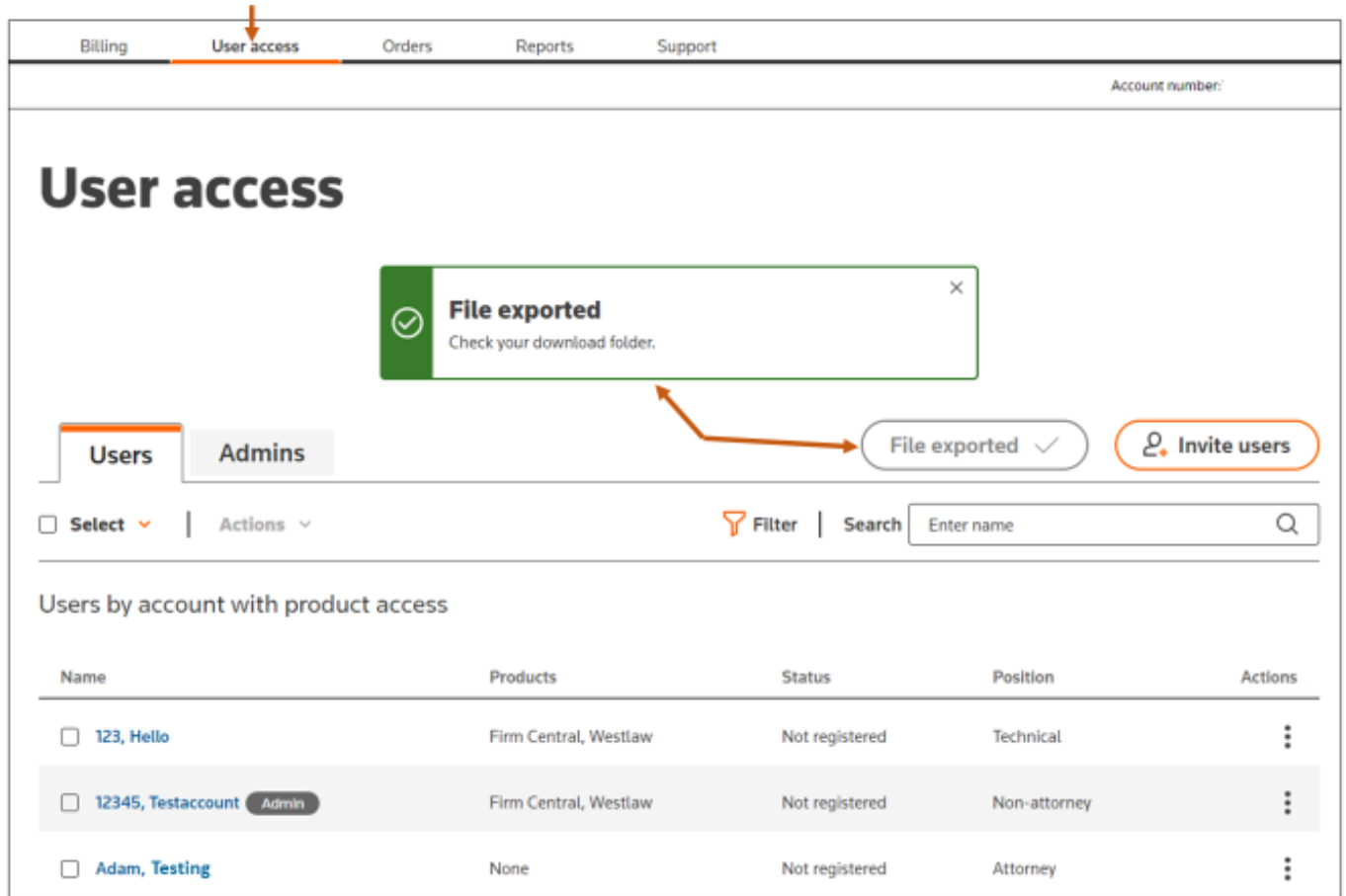
Name	Products	Status	Position	Actions
<input type="checkbox"/> Adam, Testing	None	Not registered	Attorney	⋮
<input type="checkbox"/> Turner, Peter	Westlaw	Not registered	Attorney	⋮
<input type="checkbox"/> C, Skye Admin	Firm Central	Not registered	Attorney	⋮
<input type="checkbox"/> Newusertestemail, Alice	None	Not registered	Attorney	⋮

As the list of users downloads, you will see status boxes indicating that the file is being prepared to download.

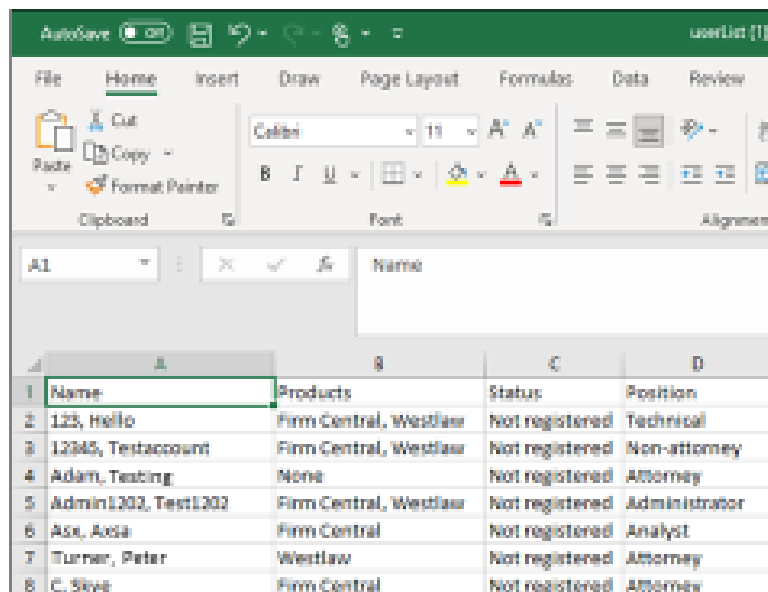
The screenshot displays the 'User access' section of the Thomson Reuters self-service portal. At the top, a navigation bar includes 'Billing', 'User access' (highlighted), 'Orders', 'Reports', and 'Support'. An 'Account number:' field is visible in the top right. The main heading is 'User access'. A blue notification box titled 'Preparing file' with an information icon and a close button (X) states: 'You can keep working while we load your data.' Below this, there are two tabs: 'Users' (active) and 'Admins'. To the right of the tabs is an 'Invite users' button. Below the tabs, there are 'Select' and 'Actions' dropdown menus, a 'Filter' icon, and a search bar with the placeholder text 'Enter name'. The main content area is titled 'Users by account with product access' and contains a table with the following data:

Name	Products	Status	Position	Actions
<input type="checkbox"/> 123, Hello	Firm Central, Westlaw	Not registered	Technical	⋮
<input type="checkbox"/> 12345, Testaccount Admin	Firm Central, Westlaw	Not registered	Non-attorney	⋮
<input type="checkbox"/> Adam, Testing	None	Not registered	Attorney	⋮

When the download completes, you will see status boxes indicating that the File was exported.



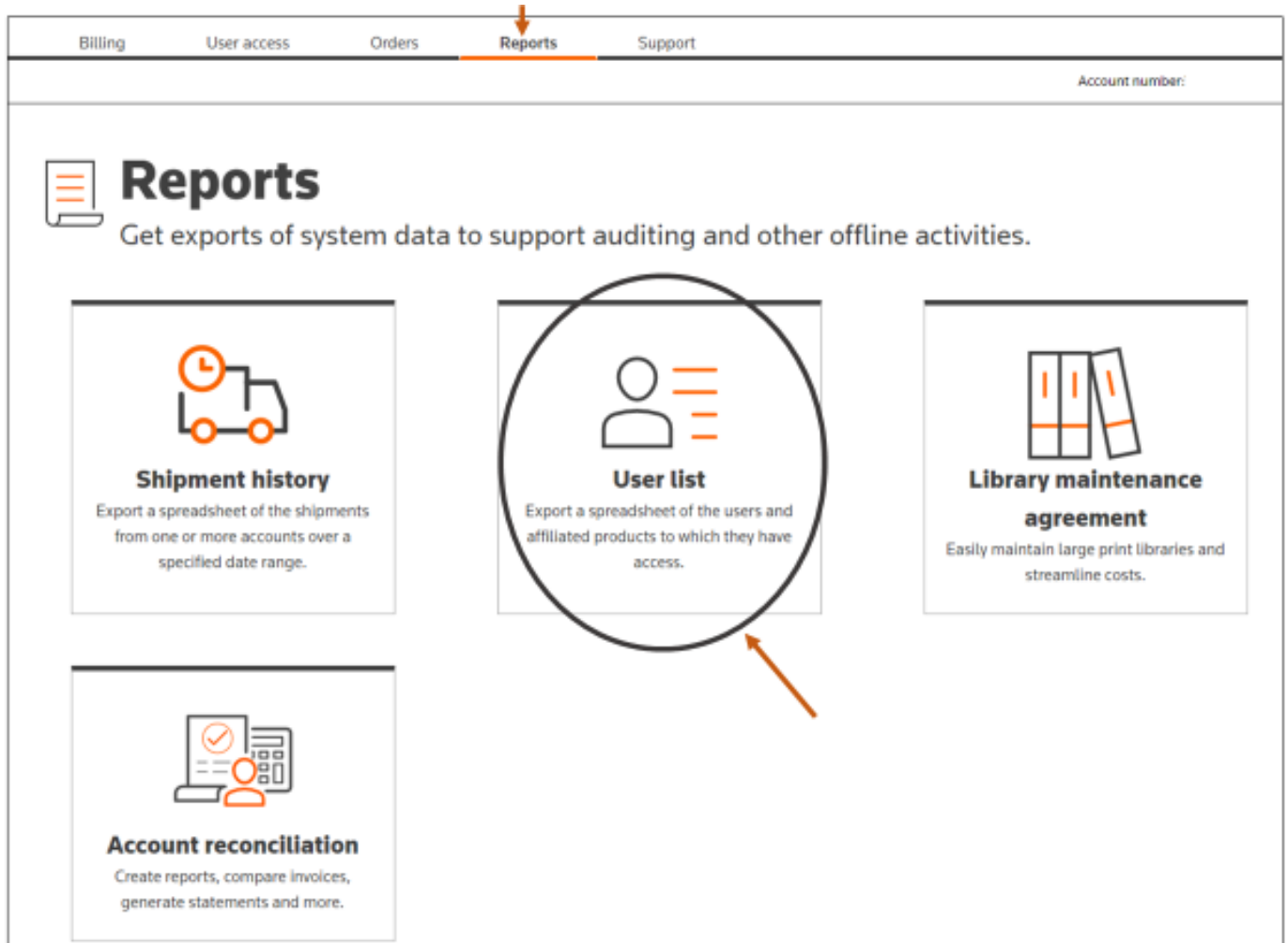
The downloaded Excel file will look similar to the below. Note that you may need to adjust the column widths to properly view the data.



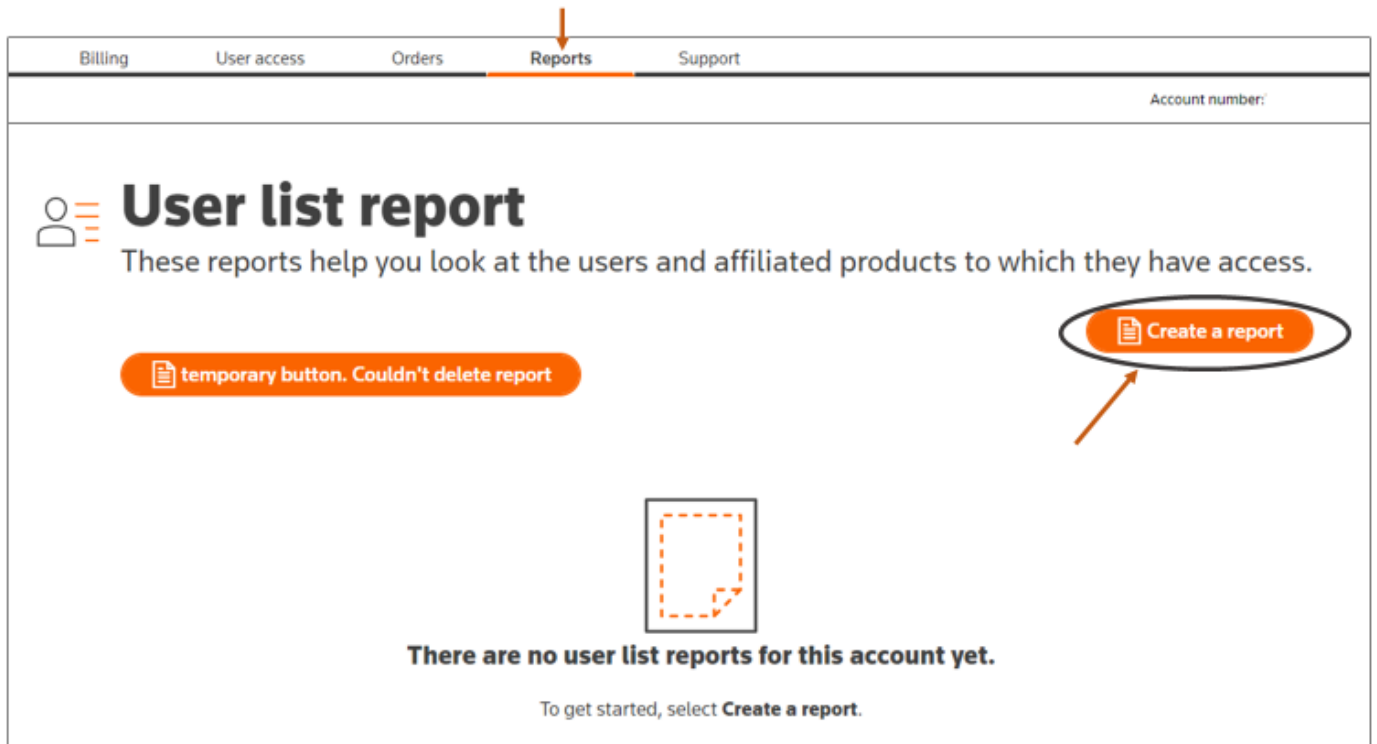
Get a Report of Users

We anticipate that user list reports will be available in 2024.

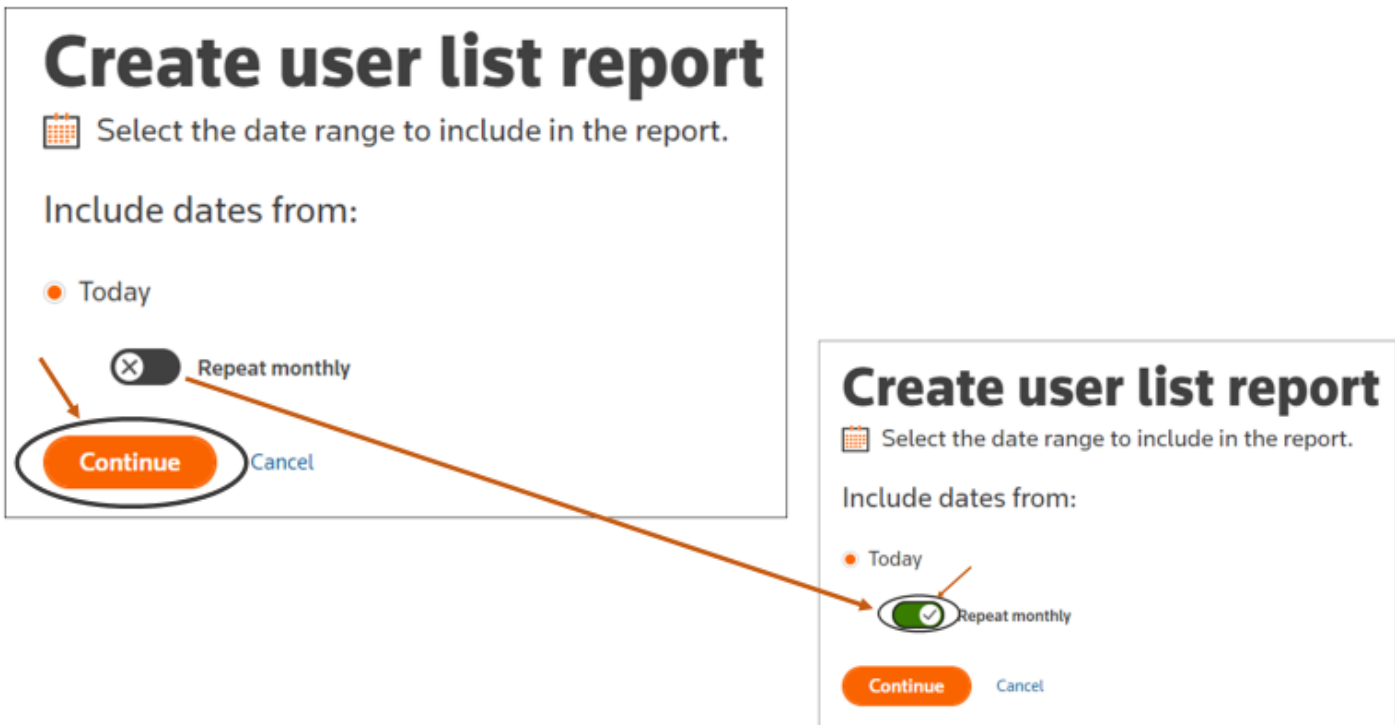
Navigate to the **Reports** tab and click **User list**.



Next, click **Create a report**.



Next, determine whether you want the report to run monthly. If so, click the **Repeat monthly** toggle button so it appears green with a check mark before clicking Continue. Then, click **Continue**.



Next, select the accounts for which you want to run the report. Then, click **Review report**.

Create user list report
Select the user accounts from which to save and run reports.

Available accounts list **Review report** [Cancel](#)

1 of 1 selected Search

Account ↓	Name	Address
<input checked="" type="checkbox"/> 100	**TEST FOR CENTRAL **TESTING ONLY**	610 OPPERMAN DR, EAGAN, VT SA

Viewing 1 - 1 Rows per page

Next, review the report details. If the details are correct, then click **Save and run report**.

Review your user list report
Now, review the report details. If everything looks good, save and run the report.


Report name [Edit](#) Date range [Edit](#)
user-list-report/Jun 15, 2022 11:10 AM **Today**
(Jun 15, 2022)





Selected accounts [Edit](#) Recurring [Edit](#)
100 **No**
****TEST FOR**
****TESTING ONLY****



Save and run report [Cancel](#)

If any of the details are incorrect, click **Edit** next to the wrong information and make the necessary change before continuing.

Review your user list report


 Now, review the report details. If everything looks good, save and run the report.


Report name 	Date range 
user-list-report/ Jun 15, 2022 11:10 AM	Today (Jun 15, 2022)
Selected accounts 	Recurring 
100 **TEST FOR **TESTING ONLY**	No

After running the report, you will see a confirmation window indicating that your report is being created. You will receive an email when the report is ready for download.

We're running your report

 This can take up to 4 hours, but you don't need to keep this page open. We'll email you at **current.testing@mailinator.com** when the data is available for download.



If you return to the **Reports** tab and click **User list**, you will see the status of your report.

Account number:

User list report

These reports help you look at the users and affiliated products to which they have access.

Create a report

Available and pending reports

Account	Date range	Status	
TEST FOR **TESTING ONLY	06/15/2022	Pending	⋮ Actions

Viewing 1 - 1

Rows per page 10

Manage Product Users

View and Edit User Details

To view a product user's details, navigate to the **User access** tab and click on the desired user's name.

The screenshot shows the 'User access' page with the following elements:

- Navigation tabs: Billing, **User access**, Orders, Reports, Support.
- Account number field: Account number: _____
- Section header: **User access**
- Sub-sections: **Users** (selected), Admins.
- Actions: Export list to file (download icon), Invite users (plus icon).
- Tools: Select (checkbox), Actions (dropdown), Filter (funnel icon), Search (input field with 'Enter name' placeholder and search icon).
- Table title: Users by account with product access
- Table columns: Name, Products, Status, Position, Actions.
- Table rows:
 - 123, Hello | Firm Central | Not registered | Technical | ⋮
 - 12345, Testaccount **Admin** | Firm Central, Westlaw | Not registered | Non-attorney | ⋮
 - Adam, Testing | None | Not registered | Attorney | ⋮
 - Admin1202, Test1202 | Firm Central, Westlaw | Not registered | Administrator | ⋮
 - Asx, Axxa | Firm Central | Not registered | Analyst | ⋮
 - Turner, Peter | Westlaw | Not registered | Attorney | ⋮
 - C. Skye** **Admin** | Firm Central, Westlaw | Not registered | Non-attorney | ⋮

Next, view the user's personal details and product access. To edit the user's personal details, click on **Edit** on the right-side of the **Personal details** box.

The screenshot shows a user management interface for a user named 'Skye C'. At the top left, there is a 'Back to User access' link. The user's profile is shown with a circular icon and the name 'Skye C', with a status of 'Not registered'. A 'Remove Skye' link is visible in the top right. The main content is divided into two columns. The left column is titled 'Personal details' and contains fields for Name (Skye C), Contact ID (0021613335), Position (Non-attorney), Email (skye.c@abc.com), Phone (N/A), Permissions (Billing, Manage Orders and Subscriptions, User Access), and End date. An 'Edit' link is located at the top right of this section, circled in orange with an arrow pointing to it. The right column is titled 'Products' and shows 'Products not yet registered' with an 'Edit products' link. Below this, there is a 'Send registration links' button and a list of products: 'Firm Central' (Product admin) with registration key 13936496, and 'Westlaw' with registration key 13936495.

Make any desired changes to the user's last name, email address, phone number or permissions. Then, click **Save**.

The screenshot shows a user profile page for 'Skye C' with a status of 'Not registered'. The page is divided into two main sections: 'Personal details' and 'Products'. The 'Personal details' section contains fields for First name (Skye), Last name (empty), Contact ID (0021011335), Position (Non-attorney), Email (empty), Phone (optional), Permissions (Billing, Manage Orders and Subscrip...), and End date (optional). The 'Products' section shows 'Products not yet registered' with a 'Send registration links' button and two product entries: 'Firm Central' and 'Westlaw', both with a registration key of 13956495. A 'Save' button is highlighted with a red circle and an arrow pointing to it from the left.

← Back to User access

Skye C
Status: **Not registered** [Remove Skye](#)

Personal details

First name
Skye
First name can't be edited

Last name

Contact ID
0021011335
Contact ID can't be edited

Position
Non-attorney

Email
This email is used for account communications only. OnePass email can't be edited here.

Phone (optional)

Permissions
Billing, Manage Orders and Subscrip...

End date (optional)
Enter as mm/dd/yyyy

Save [Cancel](#)

Products

[Edit products](#)

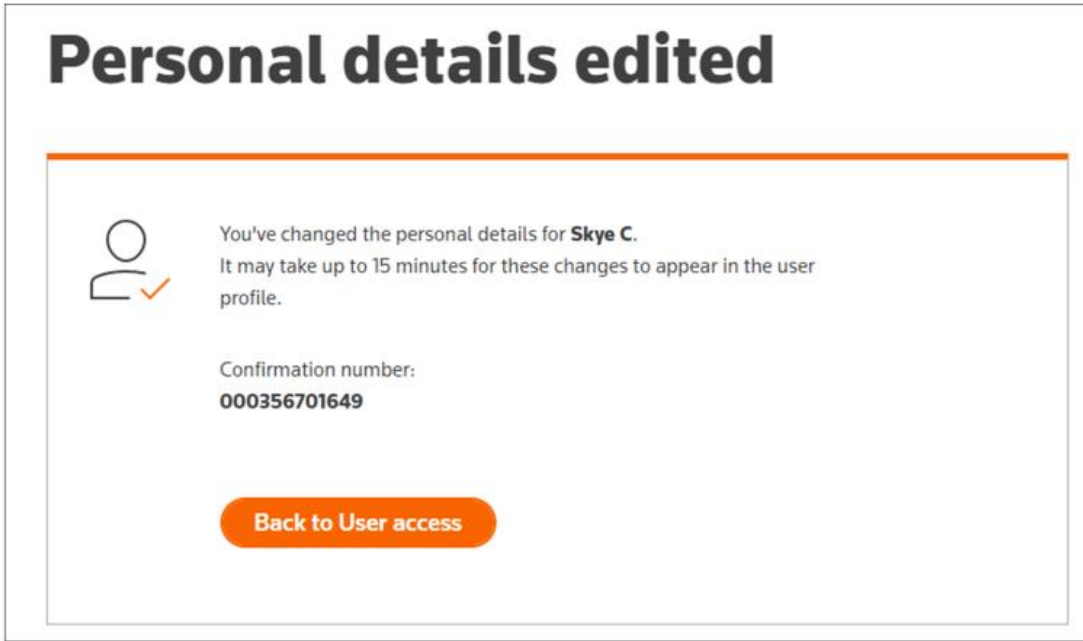
Products not yet registered ^
Send an invite link for any products that are not yet registered.

Send registration links

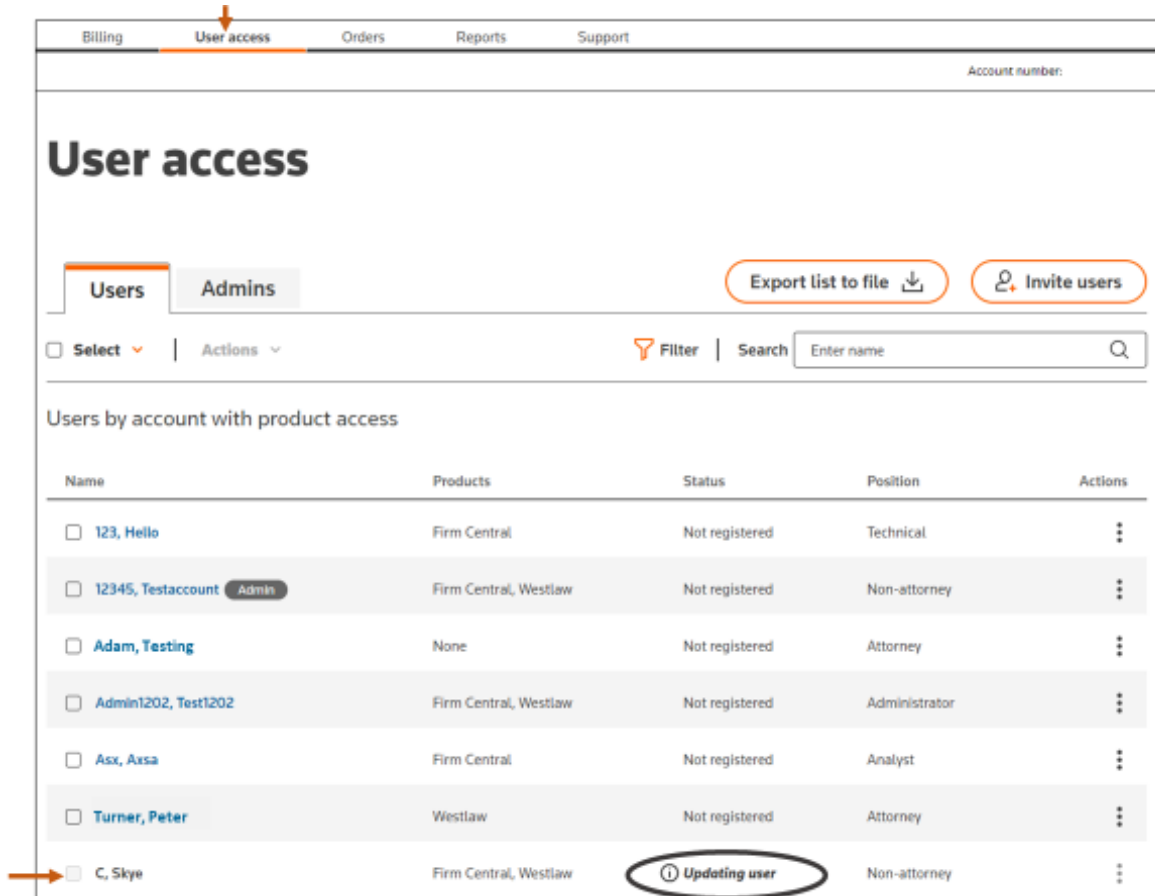
Firm Central Product admin
Registration key
13956495

Westlaw
Registration key
13956495

After clicking Save, you will receive a confirmation similar to the one below.



If you navigate back to the **User access** tab, the status for that user will appear as **Updating user**.



Add Users

Navigate to the **User access** tab and click **Invite users**.

The screenshot shows the 'User access' dashboard. At the top, a navigation bar includes 'Billing', 'User access' (selected), 'Orders', 'Subscriptions', 'Reports', and 'Support'. Below this, the main heading is 'User access'. There are two tabs: 'Users' (selected) and 'Admins'. To the right of the tabs are two buttons: 'Export list to file' and 'Invite users'. The 'Invite users' button is circled in orange. Below the buttons are filters and a search bar. A table lists users with columns for Name, Products, Status, Position, and Actions.

Name	Products	Status	Position	Actions
<input type="checkbox"/> 123, Hello	Firm Central	Not registered	Technical	⋮
<input type="checkbox"/> 1234, Testaccount	Firm Central, Westlaw	Not registered	Non-attorney	⋮
<input type="checkbox"/> Adam, Testing	None	Not registered	Attorney	⋮

From the Users box on the left, select **+ Invite users**.

The screenshot shows the 'Invite users' page. At the top left, there is a 'Back to User access' link. The main heading is 'Invite users'. Below the heading is a sub-heading: 'Choose which role to assign new users. You can always update them later.' There are two main sections: 'Users' and 'Admins'. The 'Users' section has a '+ Invite users' button circled in orange. The 'Admins' section has a '+ Invite admins' button.

Add a first and last name, email address, and select their position from the dropdown menu. If desired, add an end date for when the user's access will expire. Then, click **Continue** on the bottom left. **Note - Bulk Upload via Excel file will be available in 2024.*

← Back to User access

Invite users

Add up to 5 people. Or [upload more with an Excel file](#) in just a few steps.

User details

Contact 1

First name Last name Position

Error: Enter a first name.

Email End date mm/dd/yyyy (optional)

+ Add another user

Account

Name: ****TEST FOR FIRM CENTRAL **TESTING ONLY****

Account:

Address: **610 OPPERMAN DR
EAGAN VT USA**

Continue [Cancel](#)

To add an additional user, click **+ Add another user** on the left side.

← Back to User access

Invite users

Add up to 5 people. Or [upload more with an Excel file](#) in just a few steps.

User details

Contact 1

First name Last name Position

Enter a first name. Choose a position.

Email End date mm/dd/yyyy (optional)

+ Add another user

Under **Contact 2**, add a first and last name, email address, and select their position from the dropdown menu. If desired, add an end date for when the user's access will expire. Then, click **Continue**.

← Back to User access

Invite users

Add up to 5 people. Or [upload more with an Excel file](#) in just a few steps.

User details

Contact 1 Remove x

First name Last name Position

Enter a first name. Choose a position.

Email End date mm/dd/yyyy (optional)

Contact 2 Remove x

First name Last name Position

Enter a first name.

Email End date mm/dd/yyyy (optional)

+ Add another user

Account

Name: ****TEST FOR FIRM CENTRAL **TESTING ONLY****

Account:

Address: **G10 OPPERMAN DR
EAGAN VT | USA**

Continue Cancel

To add more than five (5) people, click on the link **upload more with an Excel file**.

[← Back to User access](#)

Invite users

Add up to 5 people. Or **upload more with an Excel file** in just a few steps.

User details

Contact 1

First name	Last name	Position
<input type="text" value="Enter first name"/>	<input type="text" value="Enter last name"/>	<input type="text" value="Choose"/>

Enter a first name. Choose a position.

Email	End date mm/dd/yyyy (optional)
<input type="text" value="Enter email"/>	<input type="text"/>

[+ Add another user](#)

Account

Name: ****TEST FOR FIRM CENTRAL **TESTING ONLY****

Account: **100**

Address: **610 OPPERMAN DR
EAGAN VT USA**

[Continue](#) [Cancel](#)

Next, click on the **Excel Template** button. Then, complete the Excel template. Next, upload the completed Excel template. Then, click **Continue**.

The screenshot shows the 'Invite users' interface with three main steps:

- 1. Download template:** A button labeled 'Excel Template' is highlighted with an orange arrow.
- 2. Enter user details:** A 'Drop files to upload' area with a 'Choose file' button and a '7 MB limit per upload' note is highlighted with an orange arrow.
- 3. Upload completed template:** A 'Continue' button is circled in black and highlighted with an orange arrow.

The Excel spreadsheet, titled 'invite_users_template.xlsx', has the following structure:

	A	B	C	D	E
1	First name	Last name	Position	Email	End date (mm/dd/yyyy, optional)
2					
3					
4					

To Edit user details, click **Edit user details**.

The 'User details' section shows a table with the following data:

Name	Position	Email	End date
Sadie P	Contractor	sadie.p@abc.com	None

An 'Edit user details' link with a pencil icon is circled in black in the top right corner of the table area.

Next, make any desired changes. Then, click **Continue**.

[← Back to User access](#)

Invite users

Add up to 5 people. Or [upload more with an Excel file](#) in just a few steps.

User details

Contact 1

First name	Last name	Position
<input type="text" value="Sadie"/>	<input type="text" value="P"/>	<input type="text" value="Contractor"/>

Email	End date mm/dd/yyyy (optional)
<input type="text" value="sadie.p@abc.com"/>	<input type="text"/>

[+ Add another user](#)

Account

Name: ****TEST FOR
FIRM CENTRAL **TESTING
ONLY****

Account: **100**

Address: **610 OPPERMAN DR
EAGAN VT USA**

[Continue](#) [Cancel](#)

Select the desired product(s) to which you want to grant access. If assigning **Firm Central**, select whether to grant **Firm Central Administrator** access. Then, click **Continue**.

The screenshot shows the 'Invite users' page with the following sections:

- Back to User access** (link)
- Invite users** (title)
- User details** (icon) [Edit user details](#) (link)

Name	Position	Email	End date
Sadie P	Contractor	sadie.p@abc.com	None
- Account** (icon)

Name: ****TEST FOR FIRM CENTRAL **TESTING ONLY****
Account: **100***
Address: **610 OPPERMAN DR EAGAN VT USA**
- Products** (icon)

Assign products and subscriptions for all users that you're inviting.

Looking for something?
Some products aren't supported here quite yet. Until they are, you can still invite users by accessing [My Account](#)

 - Westlaw**
 - Firm Central**

Continue [Cancel](#)

A detailed view of the 'Firm Central' product selection options is shown in a callout box:

- Firm Central**
- Product admin (optional)**
 - Firm Central Administrator**
- Continue** [Cancel](#)

Orange callout boxes and arrows highlight the 'Westlaw' and 'Firm Central' product selection options, the 'Continue' button, and the 'Firm Central Administrator' checkbox in the detailed view.

Then, click **Invite users**.

[← Back to User access](#)

Review details

Once you submit, products are usually ready to use within about 30 minutes.

User details [Edit user details](#)

Name	Position	Email	End date
Sadie P	Contractor	sadie.p@sbc.com	None

Account

Name: **TEST FOR FIRM CENTRAL **TESTING ONLY**

Account: 100-

Address: 610 OPPERMAN DR
EAGAN VT USA

Products [Edit products](#)

Westlaw

Confirmation email

You'll receive a confirmation email at allicetestcspmyasinc@mailinator.com.

Notify invited users

Once access is available, we'll send registration links directly to each invited user.


Send links to users

[Invite users](#) [Cancel](#)

After clicking Invite users, you will receive a confirmation similar to the one below.

[← Back to User access](#)

Users invited

 You've invited 1 users

When products are ready to use, we'll send the registration details. This usually happens within about 30 minutes.

Confirmation: **#000356695310**

Invited by:

[Back to User access](#)

If you navigate back to the **User access** tab, you will see a blue box notification that a new user was added. Also, you can see the new user listed under the **Users** tab. Note, the status will appear as **Adding user** until the system completes the update.

The screenshot displays the 'User access' interface. At the top, navigation tabs include Billing, **User access**, Orders, Subscriptions, Reports, and Support. A notification box in the center reads: **Added 1 user**, It can take up to 30 minutes for all systems to reflect this. [Dismiss X](#). Below the notification, there are tabs for **Users** and Admins, along with buttons for 'Export list to file' and 'Invite users'. A search bar and filter options are also present. The main section is titled 'Users by account with product access' and contains a table with the following data:

Name	Products	Status	Position	Actions
<input type="checkbox"/> Florham, Erik	None	Not registered	Administrator	⋮
<input type="checkbox"/> Corley, Scott	Westlaw	Not registered	Non-attorney	⋮
<input type="checkbox"/> Lee, Apple	Westlaw	Not registered	Contractor	⋮
<input type="checkbox"/> Newsrtestemail, Alice	None	Not registered	Attorney	⋮
<input type="checkbox"/> P, Sedia	Westlaw	Not registered	Contractor	⋮
<input type="checkbox"/> Prodjanval, Alice3	Firm Central, Westlaw	Not registered	Attorney	⋮
<input type="checkbox"/> Products, Multiple	Westlaw	Not registered	Non-attorney	⋮
<input type="checkbox"/> P, Sedia	Westlaw	Adding user	Non-attorney	⋮

Remove Users

There are four (4) ways to remove a user.

- 1) Navigate to the **User access** tab and click on the user that you want to remove.

User access

Users Admins

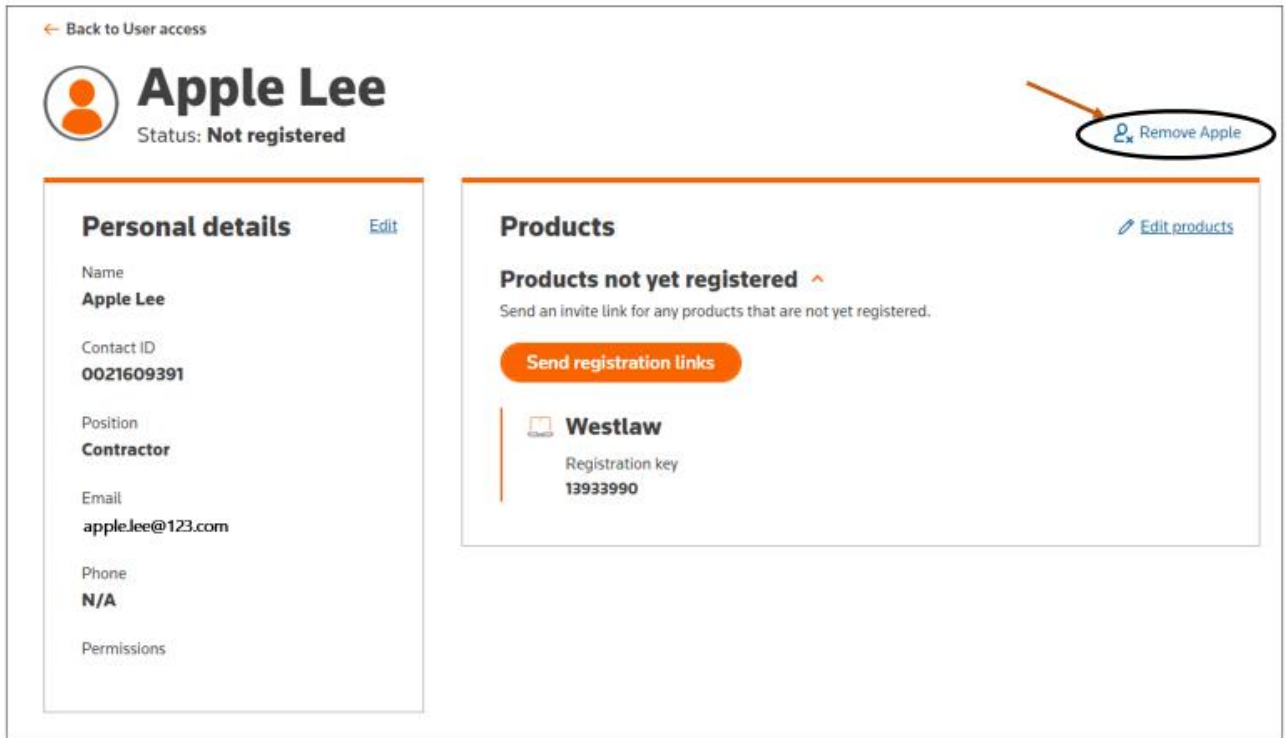
Export list to file Invite users

Select Actions Filter Search Enter name

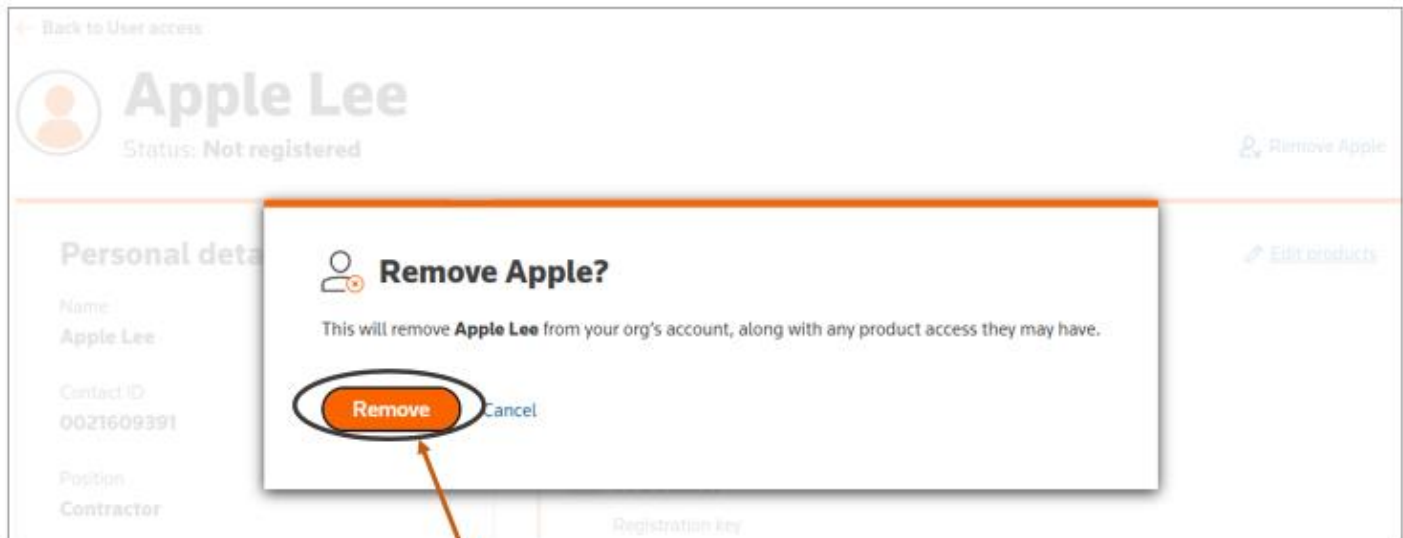
Users by account with product access

Name	Products	Status	Position	Actions
<input type="checkbox"/> Florham, Erik	None	Not registered	Administrator	
<input type="checkbox"/> Corley, Scott	Westlaw	Not registered	Non-attorney	
<input type="checkbox"/> Lee, Apple	Westlaw	Not registered	Contractor	
<input type="checkbox"/> Newusertestemail, Alice	None	Not registered	Attorney	
<input type="checkbox"/> P, Sadie	Westlaw	Not registered	Contractor	

Next, click **Remove [user's name]** on the right side.



Then, click **Remove**.



- 2) Navigate to the **User access** tab. Click on the three dots under the **Actions** tab for the user you want to remove. Then, select **Remove user**.

The screenshot shows the 'User access' page with the 'Users' tab selected. A table lists users with columns for Name, Products, Status, Position, and Actions. The 'Actions' column for the user 'P, Sadie' is highlighted, and a callout menu is open, showing options: 'Send registration links', 'Edit products', and 'Remove user'. The 'Remove user' option is circled, and an arrow points to it from the right.

Name	Products	Status	Position	Actions
<input type="checkbox"/> Florham, Erik	None	Not registered	Administrator	⋮
<input type="checkbox"/> Corley, Scott	Westlaw	Not registered	Non-attorney	⋮
<input type="checkbox"/> Lee, Apple	Westlaw	Not registered	Contractor	⋮
<input type="checkbox"/> Newusertestemail, Alice	None	Not registered	Attorney	⋮
<input type="checkbox"/> P, Sadie Admin	Westlaw	Not registered	Con	⋮
<input type="checkbox"/> P, Sadie	Westlaw	Not registered	Non-attorney	⋮
<input type="checkbox"/> Prodjanval, Alice3	Firm Central, Westlaw	Not registered	Attorney	⋮

Then, click **Remove**.

The screenshot shows the 'User access' page with a dialog box overlaid. The dialog box is titled 'Remove P, Sadie?' and contains the text: 'This will remove P, Sadie from your org's account, along with any product access they may have.' Below the text are two buttons: 'Remove' (circled in orange) and 'Cancel'.

After clicking Remove, you will receive a confirmation similar to the one below. Then, if you click **Back to User access**, you will see a blue box similar to the one below stating that a user was removed.

Removing user

We're removing **Sadie P** from your account. Any product access they may have will expire shortly. You'll get a confirmation message when complete.

Confirmation number:
000356695601

Back to User access

Billing
User access
Orders
Subscriptions
Reports
Support

Account number:

User access

i

Removed 1 user

It can take up to 30 minutes for all systems to reflect this. [Dismiss X](#)

Export list to file
Invite users

Select
Actions
Filter
Search

Users by account with product access

Name	Products	Status	Position	Actions
<input type="checkbox"/> 123, Hello	Firm Central	Not registered	Technical	⋮
<input type="checkbox"/> 12345, Testaccount Admin	Firm Central, Wordlaw	Not registered	Non-attorney	⋮
<input type="checkbox"/> Projamaul, Akool	Firm Central, Wordlaw	Not registered	Attorney	⋮
<input type="checkbox"/> Products, Multiple	Wordlaw	Not registered	Non-attorney	⋮
<input type="checkbox"/> P, Sadie	Wordlaw	Removed user	Non-attorney	⋮

- 3) To remove multiple users, navigate to the **Users access** tab. Next, select all users from the Users (or Admins) list that you want to remove. Then, click the carrot to the right of **Actions** on the left side and select **Remove users**.

The screenshot shows the 'User access' interface. At the top, there is a navigation bar with tabs: Billing, **User access**, Orders, Subscriptions, Reports, and Support. Below this, there are sub-tabs for 'Users' and 'Admins'. To the right, there are buttons for 'Export list to file' and 'Invite users'. Below the sub-tabs, there is a 'Select' dropdown, an 'Actions' dropdown (which is open, showing 'Send registration links' and 'Remove users'), a 'Filter' icon, and a search bar labeled 'Search' with the placeholder 'Enter name'. The main content area is titled 'Users by account access' and contains a table with the following columns: Name, Products, Status, Position, and Actions. The table lists several users, with 'Lee, Apple' and 'P, Sadie' selected. An arrow points to the 'Remove users' option in the 'Actions' dropdown menu.

Name	Products	Status	Position	Actions
<input type="checkbox"/> Florhan, Erik	None	Not registered	Administrator	⋮
<input type="checkbox"/> Corley, Scott	Westlaw	Not registered	Non-attorney	⋮
<input checked="" type="checkbox"/> Lee, Apple	Westlaw	Not registered	Contractor	⋮
<input type="checkbox"/> Newuserstestemail, Alice	None	Not registered	Attorney	⋮
<input type="checkbox"/> P, Sadie Admin	Westlaw	Not registered	Contractor	⋮
<input checked="" type="checkbox"/> P, Sadie	Westlaw	Not registered	Non-attorney	⋮
<input type="checkbox"/> Prodjanvat, Alice3	Firm Central, Westlaw	Not registered	Attorney	⋮

Next, click **Confirm**.

Review details
The selected users will be removed from your org's account, along with any product access they may have.

Name	Email	Products	Position	
P, Sadie	sadie.p@abc.com	Westlaw	Non-attorney	Remove from list
Lee, Apple	a.lee@abc.com	Westlaw	Contractor	Remove from list

Confirm [Cancel](#)

If you do not want to remove one of the listed users, click **Remove from list**.

Review details
The selected users will be removed from your org's account, along with any product access they may have.

Name	Email	Products	Position	
P, Sadie	sadie.p@abc.com	Westlaw	Non-attorney	Remove from list
Lee, Apple	a.lee@abc.com	Westlaw	Contractor	Remove from list

Confirm [Cancel](#)

- An administrator who manages multiple location accounts, may remove users through the Find a User page.

Send/Resend Product Registration Links

There are three ways to send product registration links to users.

- 1) Navigate to the **User access** tab and click the user to whom you want to send a product registration link.

The screenshot shows the 'User access' page in the Thomson Reuters self-service portal. The top navigation bar includes 'Billing', 'User access' (highlighted), 'Orders', 'Reports', and 'Support'. Below this, there are tabs for 'Users' and 'Admins', and buttons for 'Export list to file' and 'Invite users'. A search bar and filter options are present. A table lists users with columns for Name, Products, Status, Position, and Actions. An orange arrow points to the user 'C, Skye' in the table.

Name	Products	Status	Position	Actions
<input type="checkbox"/> 123, Hello	Firm Central	Not registered	Technical	⋮
<input type="checkbox"/> 12345, Testaccount Admin	Firm Central, Westlaw	Not registered	Non-attorney	⋮
<input type="checkbox"/> Adam, Testing	None	Not registered	Attorney	⋮
<input type="checkbox"/> Admin1202, Test1202	Firm Central, Westlaw	Not registered	Administrator	⋮
<input type="checkbox"/> Asx, Axxa	Firm Central	Not registered	Analyst	⋮
<input type="checkbox"/> Turner, Peter	Westlaw	Not registered	Attorney	⋮
<input type="checkbox"/> C, Skye Admin	Firm Central, Westlaw	Not registered	Non-attorney	⋮

Next, click **Send registration links** from the **Products** box.

← Back to User access

Skye C
Status: **Not registered** Remove Skye

Personal details [Edit](#)

Name
Skye C

Contact ID
0021613335

Position
Non-attorney

Email
skye.c@abc.com

Phone
N/A

Permissions
Billing
Manage Orders and Subscriptions
User Access

End date

Products [Edit products](#)

Products not yet registered ^
Send an invite link for any products that are not yet registered.

Send registration links

Firm Central Product admin
Registration key
13936496

Westlaw
Registration key
13936495

After clicking the Send registration links, you will receive a confirmation similar to the one below.

Invite links sent

We've sent registration links to Skye C at **skye.c@abc.com**

You can resend registration links as needed.

[Back to profile](#)

- 2) Navigate to the **User access** tab. Click on the three dots under the **Actions** tab for the user whose product access you want to change. Then, select **Send registration links**.

The screenshot shows the 'User access' interface. At the top, there are navigation tabs: Billing, User access (selected), Orders, Reports, and Support. Below the tabs, the user 'Alice testscpty@sync' and account number '1004315216' are displayed. The main heading is 'User access'. There are two tabs: 'Users' (selected) and 'Admins'. On the right, there are buttons for 'Export list to file' and 'Invite users'. Below these are 'Select' and 'Actions' dropdowns, a 'Filter' icon, and a search box labeled 'Search' with the placeholder 'Enter name'. The main content area is titled 'Users by account with product access' and contains a table with the following columns: Name, Products, Status, Position, and Actions.

Name	Products	Status	Position	Actions
<input type="checkbox"/> 123, Hello	Firm Central	Not registered	Technical	⋮
<input type="checkbox"/> 12345, Testaccount Admin	Firm Central, Westlaw	Not registered	Non-attorney	⋮
<input type="checkbox"/> Adam, Testing	None	Not registered	Attorney	⋮
<input type="checkbox"/> Admin1202, Test1202	Firm Central, Westlaw	Not registered	Administrator	⋮
<input type="checkbox"/> Asx, Asxa	Firm Central	Not registered	Analyst	⋮
<input type="checkbox"/> Turner, Peter	Westlaw	Not registered	Attorney	⋮
<input type="checkbox"/> C, Skye Admin	Firm Central	Not registered	A	⋮

The 'Actions' dropdown for the user 'C, Skye' is open, showing three options: 'Send registration links' (highlighted with a red circle), 'Edit products', and 'Remove user'. A red arrow points to the 'Actions' column header.

Next, click **Send**.

The screenshot shows the 'User access' page with a modal dialog box open. The dialog box has a title 'Send registration links?' and a message: 'Registration links will be sent to skye.c@abc.com for products that are not yet registered'. There are two buttons: 'Send' (highlighted with a red circle) and 'Cancel'. A red arrow points to the 'Send' button.

After clicking send, you will see a green box similar to the one below stating that registration links were sent.

The screenshot shows the 'User access' section of a self-service portal. At the top, there are navigation tabs: Billing, User access (highlighted with an orange arrow), Orders, Reports, and Support. Below the tabs is a header area with 'Account number:' on the right. The main heading is 'User access'. There are two tabs: 'Users' (active) and 'Admins'. To the right of these tabs are two buttons: 'Export list to file' with a download icon and 'Invite users' with a person icon. Below the tabs is a toolbar with a 'Select' dropdown, an 'Actions' dropdown, a 'Filter' icon, and a search box labeled 'Search' with the placeholder text 'Enter name' and a search icon. The main content area is titled 'Users by account with product access' and contains a table with the following columns: Name, Products, Status, Position, and Actions. The table lists several users, including '123, Hello', '12345, Testaccount Admin', 'Adam, Testing', 'Admin1202, Test1202', 'Asx, Axxa', 'Turner, Peter', and 'C, Skye Admin'. A green notification box with a checkmark icon and the text 'Registration links have been sent to the user' is overlaid on the bottom right of the table, with an orange arrow pointing to it from the 'Turner, Peter' row.

Name	Products	Status	Position	Actions
<input type="checkbox"/> 123, Hello	Firm Central	Not registered	Technical	⋮
<input type="checkbox"/> 12345, Testaccount Admin	Firm Central, Westlaw	Not registered	Non-attorney	⋮
<input type="checkbox"/> Adam, Testing	None	Not registered	Attorney	⋮
<input type="checkbox"/> Admin1202, Test1202	Firm Central, Westlaw	Not registered	Administrator	⋮
<input type="checkbox"/> Asx, Axxa	Firm Central	Not registered	Analyst	⋮
<input type="checkbox"/> Turner, Peter	Westlaw	Not registered	Attorney	⋮
<input type="checkbox"/> C, Skye Admin			Attorney	⋮

- 3) Navigate to the **User access** tab. Select the users to whom you want to send the registration links. Next, click the **Actions** carrot. Then, click **Send registration links**.

The screenshot shows the 'User access' interface. At the top, there are navigation tabs: Billing, **User access**, Orders, Subscriptions, Reports, and Support. Below this, there are sub-tabs for 'Users' and 'Admins'. On the right, there are buttons for 'Export list to file' and 'Invite users'. A 'Select' dropdown is set to 'All'. An 'Actions' dropdown menu is open, showing 'Send registration links' and 'Remove users'. The 'Send registration links' option is circled. Below the dropdown, there is a table of users with columns: Name, Products, Status, Position, and Actions. The user 'Lee, Apple' is selected with a checkbox. A large arrow points from the 'Send registration links' option to the 'Lee, Apple' row.

Name	Products	Status	Position	Actions
<input type="checkbox"/> Gool, Krystal	Firm Central, Westlaw	Not registered	Analyst	⋮
<input type="checkbox"/> Florham, Erik	None	Not registered	Administrator	⋮
<input type="checkbox"/> Turner, Peter	Westlaw	Not registered	Non-attorney	⋮
<input checked="" type="checkbox"/> Lee, Apple	Westlaw	Not registered	Contractor	⋮
<input type="checkbox"/> Newusertestemail, Alice	None	Not registered	Attorney	⋮
<input type="checkbox"/> P, Sadia Admin	Westlaw	Not registered	Contractor	⋮
<input checked="" type="checkbox"/> P, Sadia	Westlaw	Not registered	Non-attorney	⋮

Next, select whether to send registration details to you, to the selected users or to both you and the users. Then, click **Confirm**.

Review details

The selected users have not yet registered their access to the products below.

Name	Email	Unregistered products	Position	
Lee, Apple	a.lee@abc.com	Westlaw	Contractor	Remove from list
P, Sadie	sadie.p@abc.com	Westlaw	Non-attorney	Remove from list

Email Options

Choose who should receive registration details:

Send registration details for all selected users to me at Testingcentral@mailinator.com

Send registration details and links directly to selected users

Confirm
Cancel

If an incorrect user is listed in the Review details list, click on **Remove from list** to the right of the user.

Review details

The selected users have not yet registered their access to the products below.

Name	Email	Unregistered products	Position	
Lee, Apple	a.lee@abc.com	Westlaw	Contractor	Remove from list
P, Sadie	sadie.p@abc.com	Westlaw	Non-attorney	Remove from list

Email Options

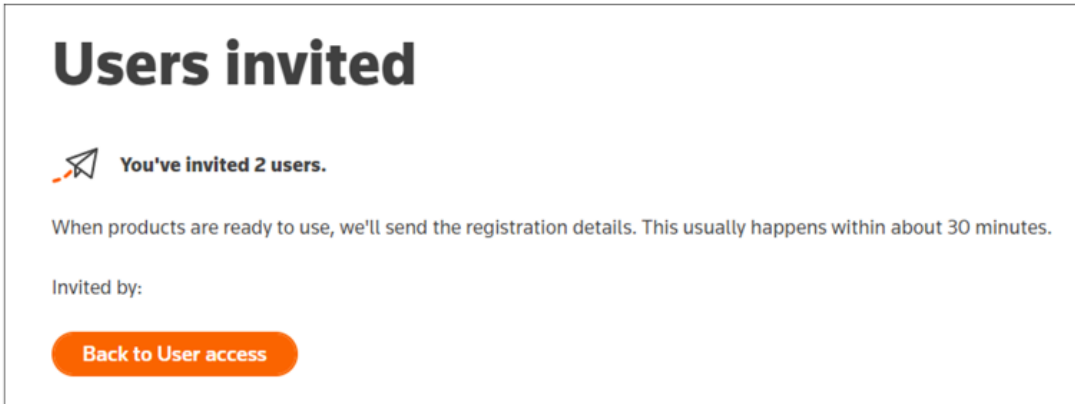
Choose who should receive registration details:

Send registration details for all selected users to me at Testingcentral@mailinator.com

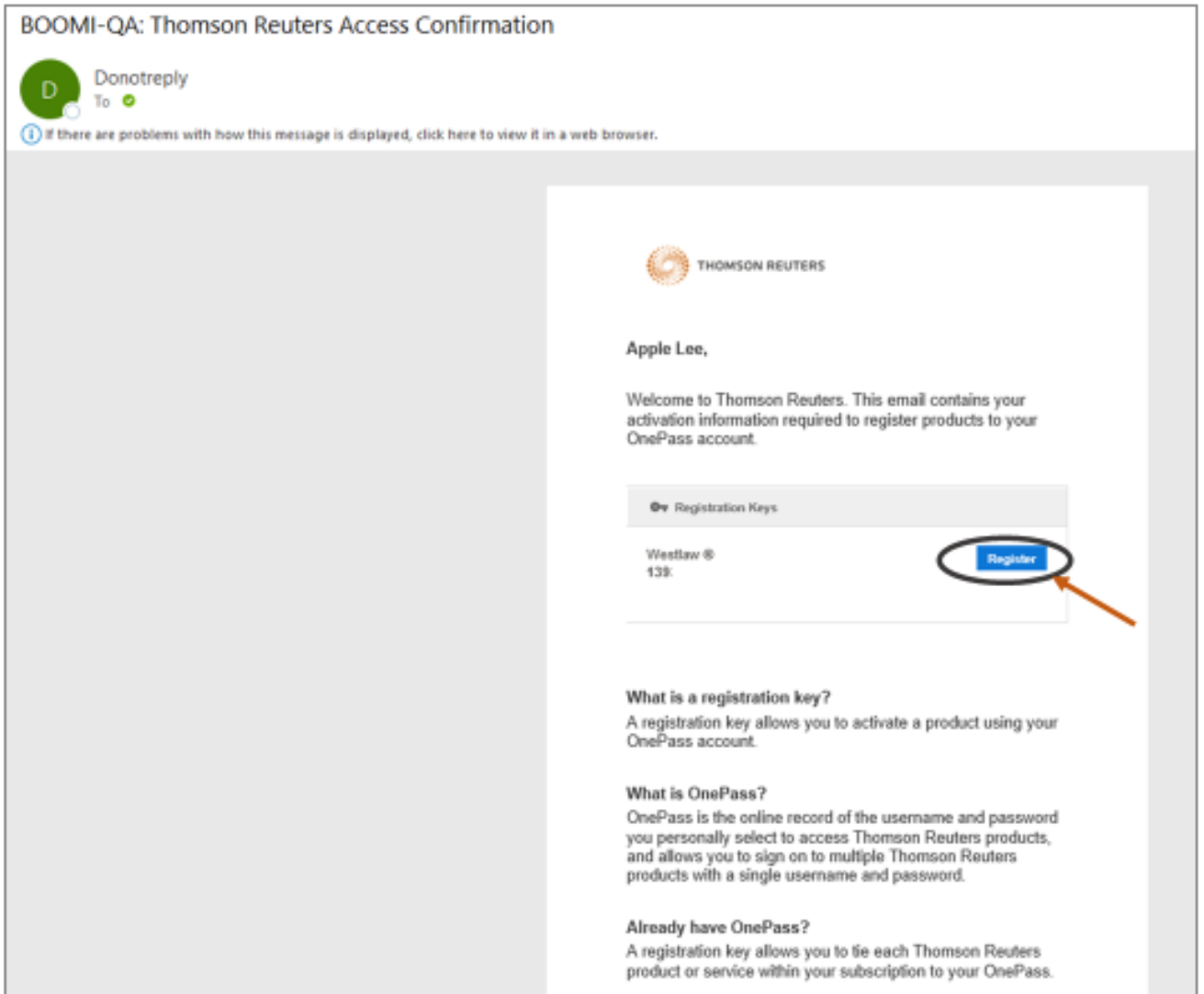
Send registration details and links directly to selected users

Confirm
Cancel

After clicking Confirm, you will receive a confirmation similar to the one below.



The user(s) to whom you sent registration links will receive an email (usually within 30 minutes) similar to the one below. To complete registration, the user must click on **Register** in the email.



Reset Password for a User

There are two ways to reset a user's password.


- 1) Navigate to the **User access** tab. Click on the three dots under the **Actions** tab for the user whose product access you want to change. Then, select **Reset password**.

The screenshot shows the 'User access' interface. At the top, there are navigation tabs: 'Billing', 'User access' (highlighted with an orange arrow), and 'Support'. Below this, there's an 'Account number:' field. The main heading is 'User access'. Underneath, there are two tabs: 'Users' (active) and 'Admins'. To the right, there are two buttons: 'Export list to file' and 'Invite users'. Below these are filters: 'Select' (checkbox), 'Actions' (dropdown), 'Filter' (funnel icon), and a search bar labeled 'Search' with the placeholder 'Enter name'. The main content area is titled 'Users by account with product access' and contains a table with the following data:

Name	Products	Status	Actions
<input type="checkbox"/> Fast, Brent	ProView, UK Books, Westlaw IE	Partially registered	⋮
<input type="checkbox"/> Sands, Tom	Data Privacy Advisor, UK Books	Registered	⋮
<input type="checkbox"/> C, Skye	Data Privacy Advisor		⋮
<input type="checkbox"/> Core with ids text	UK Books, Westlaw UK	Registered	⋮

The 'Actions' dropdown for 'Sands, Tom' is open, showing the following options: 'Registered', 'Edit products', 'Reset password' (circled in red), 'Remove user', and 'Registered'. An orange arrow points to the 'Actions' dropdown menu.

Next, select whether to send a link to the user's associated email address or to generate a temporary password to send to the user. Then, click **Continue**.

 **Reset password**

Help **Skye C** recover access to their products and account.

OnePass username

AL

Reset by

Sending a link to their associated email

Generating a temporary password to send them

Continue [Back](#)

2) Navigate to the User access tab and click on the user's name.

Account number:

User access

Users Admins

Export list to file Invite users

Select Actions Filter Search

Users by account with product access

Name	Products	Status	Actions
<input type="checkbox"/> Fast, Brent	ProView, UK Books, Westlaw IE	Partially registered	
<input type="checkbox"/> Sands, Tom	Data Privacy Advisor, UK Books	Registered	
<input type="checkbox"/> C, Skye	Data Privacy Advisor	Registered	
<input type="checkbox"/> Core with ids text	UK Books, Westlaw UK	Registered	

Next, click Reset password on the right side.

[← Back to User access](#)

Skye C
Status: **Registered**

[Remove Skye](#) [Reset password](#)

Personal details [Edit](#)

Name
Skye C

Contact ID
0021874781

Email

Phone
N/A

Permissions

Products [Edit products](#)

Registered products ^

OnePass username:

Data Privacy Advisor

Registration key: **14182283-** Last accessed: **N/A**

Next, select whether to send a link to the user's associated email address or to generate a temporary password to send to the user. Then, click **Continue**.

Reset password

Help **Skye C** recover access to their products and account.

OnePass username
AL

Reset by

- Sending a link to their associated email
- Generating a temporary password to send them

Continue [Back](#)

Afer clicking Continue, you will see a confirmation notification box indicating that a password reset link was emailed to the user.

Reset link sent

We've emailed a reset link to **Skye C** at **Skye.Ctest@abc.com**. It's valid for 3 hours or until it's used to create a new password.

OnePass username
AL

Back to profile

Edit Product Access (Add/Remove Product Access)



There are two ways to Edit product access assigned to a user.



- 1) Navigate to the **User access** tab and click on the user whose product access you want to update.

Account number:








User access

Users Admins

Export list to file  Invite users 

Select  | Actions  Filter Search

Users by account with product access

Name	Products	Status	Position	Actions
<input type="checkbox"/> 123, Hello	Firm Central	Not registered	Technical	
<input type="checkbox"/> 12345, Testaccount Admin	Firm Central, Westlaw	Not registered	Non-attorney	
<input type="checkbox"/> Adam, Testing	None	Not registered	Attorney	
<input type="checkbox"/> Admin1202, Test1202	Firm Central, Westlaw	Not registered	Administrator	
<input type="checkbox"/> Asx, Axa	Firm Central	Not registered	Analyst	
<input type="checkbox"/> Turner, Peter	Westlaw	Not registered	Attorney	
<input type="checkbox"/> C, Skye Admin	Firm Central, Westlaw	Not registered	Non-attorney	

Next, click on **Edit products** on the right-side of the **Products** box.

The screenshot shows a user profile page for 'Skye C'. At the top left, there is a 'Back to User access' link. The user's name 'Skye C' is displayed with a status of 'Not registered' and a 'Remove Skye' button. The page is divided into two main sections: 'Personal details' and 'Products'. The 'Personal details' section includes fields for Name, Contact ID, Position, Email, Phone, and Permissions. The 'Products' section shows 'Products not yet registered' with a 'Send registration links' button and a list of products: 'Firm Central' and 'Westlaw', each with a registration key. An orange arrow points to the 'Edit products' link in the top right corner of the 'Products' section.

← Back to User access

Skye C
Status: **Not registered** [Remove Skye](#)

Personal details [Edit](#)

Name
Skye C

Contact ID
0021613335

Position
Non-attorney

Email
skye.c@abc.com

Phone
N/A

Permissions
Billing
Manage Orders and Subscriptions
User Access

End date

Products [Edit products](#)

Products not yet registered ^
Send an invite link for any products that are not yet registered.

[Send registration links](#)

Firm Central **Product admin**
Registration key
13936496

Westlaw
Registration key
13936495

Then, select or deselect any product(s) access you want to add or remove and click **Save**.

The screenshot displays the 'Edit products' interface for user Skye C. The page title is 'Edit products' with a subtitle 'Change products or subscriptions for Skye C.'. Below the title is a 'Select products' section with a note: 'The number of selected seats impacts how many users you can invite. For more seats, [open a support ticket](#).' There are 'Save' and 'Cancel' buttons at the top right. An information box asks 'Looking for something?' and notes that some products aren't supported yet. The product list includes: 'Westlaw' (unchecked), 'Firm Central' (checked, with a sub-section for 'Product admin (optional)' containing 'Firm Central Administrator' which is also checked), and 'Thomson Reuters Regulatory Intelligence' (unchecked, with a warning 'All seats assigned.'). A 'Back to top' link is at the bottom left, and 'Save' and 'Cancel' buttons are at the bottom right. Orange arrows highlight the checkboxes for Westlaw, Firm Central, and the Save button.

- 2) Navigate to the **User access** tab. Click on the three dots under the **Actions** tab for the user whose product access you want to change. Then, select **Edit products**.

The screenshot shows the 'User access' interface. At the top, there are navigation tabs: Billing, **User access**, Orders, Reports, and Support. Below these are sub-tabs: **Users** and Admins. There are buttons for 'Export list to file' and 'Invite users'. A search bar is present with the text 'Enter name'. Below the search bar, the section is titled 'Users by account with product access'. A table lists several users with their details. The 'Actions' column for the user 'C, Skye' is expanded, showing three options: 'Send registration links', 'Edit products', and 'Remove user'. The 'Edit products' option is circled in red. An orange arrow points to the 'Actions' column header.

Name	Products	Status	Position	Actions
<input type="checkbox"/> 123, Hello	Firm Central	Not registered	Technical	⋮
<input type="checkbox"/> 12345, Testaccount Admin	Firm Central, Westlaw	Not registered	Non-attorney	⋮
<input type="checkbox"/> Adam, Testing	None	Not registered	Attorney	⋮
<input type="checkbox"/> Admin1202, Test1202	Firm Central, Westlaw	Not registered	Administrator	⋮
<input type="checkbox"/> Asx, Asxa	Firm Central	Not registered	Analyst	⋮
<input type="checkbox"/> Turner, Peter	Westlaw	Not registered	Attorney	⋮
<input type="checkbox"/> C, Skye Admin	Firm Central, Westlaw	Not registered		⋮

Then, select or deselect any desired product(s) and click **Save**.

Edit products
Change products or subscriptions for Skye C.

Select products
The number of selected seats impacts how many users you can invite. For more seats, [open a support ticket](#). **Save** [Cancel](#)

Looking for something?
Some products aren't supported here quite yet. Until they are, you can still invite users by accessing [My Account](#)

- Westlaw**
- Firm Central**
Product admin (optional)
 - Firm Central Administrator
- Thomson Reuters Regulatory Intelligence** ⚠ All seats assigned.

[↑ Back to top](#) **Save** [Cancel](#)

After editing the product(s) assigned to a user, you will receive a confirmation similar to the one below.

Products edited

You've changed access for [Skye C.](#) If you assigned any new products, registration emails will be sent shortly.

Confirmation number
000356701638

Back to User access

If you return to the **User access** tab immediately after editing a user's product access, the status for that user will appear as **Updating user**.

The screenshot shows the 'User access' section of the portal. At the top, there are navigation tabs: Billing, **User access**, Orders, Reports, and Support. Below these are sub-tabs: **Users** and Admins. There are buttons for 'Export list to file' and 'Invite users'. A search bar is present with the placeholder 'Enter name'. Below the search bar, the text 'Users by account with product access' is displayed. A table follows with the following data:

Name	Products	Status	Position	Actions
<input type="checkbox"/> 123, Hello	Firm Central	Not registered	Technical	⋮
<input type="checkbox"/> 12345, Testaccount Admins	Firm Central, Westlaw	Not registered	Non-attorney	⋮
<input type="checkbox"/> Adam, Testing	None	Not registered	Attorney	⋮
<input type="checkbox"/> Admin1202, Test1202	Firm Central, Westlaw	Not registered	Administrator	⋮
<input type="checkbox"/> Asx, Axsa	Firm Central	Not registered	Analyst	⋮
<input type="checkbox"/> Turner, Peter	Westlaw	Not registered	Attorney	⋮
<input type="checkbox"/> C, Skye	Firm Central, Westlaw	Updating user	Non-attorney	⋮

Add Additional Seats

Currently, we don't have a feature to support adding additional seats to an existing subscription. However, you can create a support ticket by either clicking on the **open a support ticket link** from the Edit products box or by going to the **Support** tab.

To locate the open a support ticket link, follow the steps above to Edit products. Then click **open a support ticket**.

Edit products
Change products or subscriptions for Skye C.

Select products
The number of selected seats impacts how many users you can invite. For more seats, [open a support ticket](#). Save [Cancel](#)

Looking for something?
Some products aren't supported here quite yet. Until they are, you can still invite users by accessing My Account

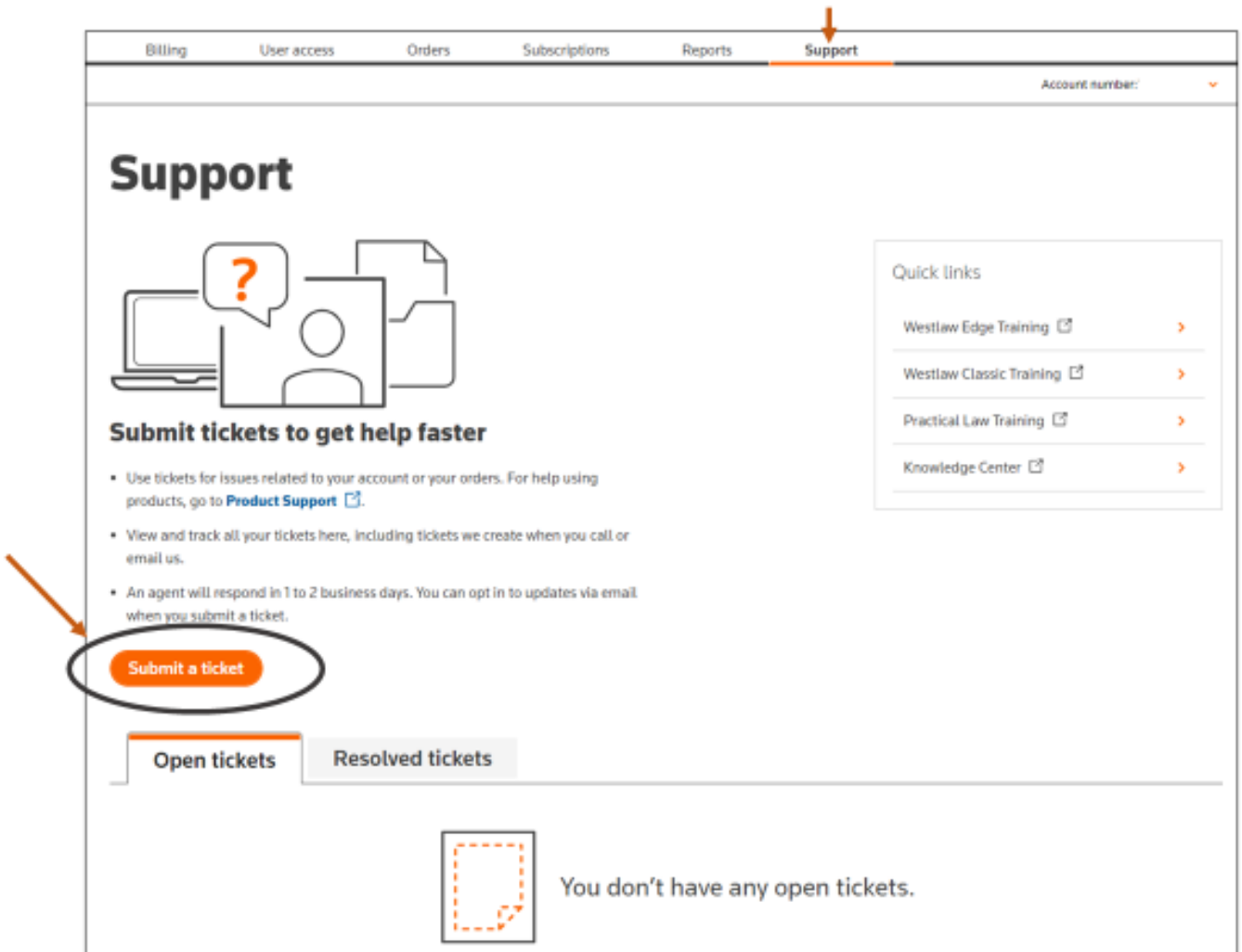
- Westlaw**
- Firm Central**

Product admin (optional)

Firm Central Administrator
- Thomson Reuters Regulatory Intelligence** ⚠ All seats assigned.

↑ Back to top Save [Cancel](#)

To open a support ticket using the Support tab, navigate to the **Support** tab and click **Submit a ticket**.



Manage Administrative Users

View and Edit Administrator User Details

To view an admin user's details, navigate to the **User access** tab. Next, click the **Admins** tab. Then, click on the desired user's name.


The screenshot shows the 'User access' page with the following elements:

- Top navigation: Billing, **User access**, Orders, Reports, Support
- Account number: []
- Section title: **User access**
- Sub-tabs: **Users**, **Admins**
- Button: **Invite users**
- Search: Search [Enter name]
- Table:

Name ↓	Permissions	Status	Actions
12345, Testaccount	Billing, Manage Tickets, User Access, View Orders and Subscriptions	Not registered	⋮
Adam, Testing	Billing, Manage Orders and Subscriptions, User Access	Registered	⋮
Lee, Apple	Billing, Manage Orders and Subscriptions, User Access	Registered	⋮
Lee, Apple	Billing, Manage Orders and Subscriptions, User Access	Not registered	⋮
C, Skye	Billing, Manage Orders and Subscriptions, User Access	Not registered	⋮

Next, view the user's personal details, including **Permissions** at the bottom of the **Personal details** box, and product access.

← Back to User access

 **Skye C**
Status: **Not registered**

[Remove Skye](#)

Personal details [Edit](#)

Name
Skye C

Contact ID
0021613335

Position
Non-attorney

Email
skye.c@abc.com

Phone
N/A



Permissions
Billing
Manage Orders and Subscriptions
User Access

End date

Products [Edit products](#)

Products not yet registered ^
Send an invite link for any products that are not yet registered.


[Send registration links](#)

-  **Firm Central** Product admin
Registration key
13936496
-  **Westlaw**
Registration key
13936495

To edit, click **Edit** on the right side of the **Personal details** box.

The screenshot shows a user profile page for 'Skye C'. At the top left, there is a 'Back to User access' link. The user's name 'Skye C' is displayed with a status of 'Not registered'. A 'Remove Skye' link is located at the top right. The page is divided into two main sections: 'Personal details' and 'Products'. In the 'Personal details' section, an 'Edit' link is circled in orange, with an arrow pointing to it from the right. The 'Personal details' section includes fields for Name (Skye C), Contact ID (0021613335), Position (Non-attorney), Email (skye.c@abc.com), and Phone (N/A). Below these fields are links for 'Billing', 'Manage Orders and Subscriptions', and 'User Access'. The 'Products' section shows 'Products not yet registered' with a 'Send registration links' button. Below this, two products are listed: 'Firm Central' (Product admin) and 'Westlaw', each with a registration key (13936496).

← Back to User access

 **Skye C**
Status: **Not registered**

[Remove Skye](#)

Personal details [Edit](#)

Name
Skye C

Contact ID
0021613335

Position
Non-attorney

Email
skye.c@abc.com

Phone
N/A


Permissions
Billing
Manage Orders and Subscriptions
User Access


End date

Products [Edit products](#)

Products not yet registered ^
Send an invite link for any products that are not yet registered.

[Send registration links](#)

 **Firm Central** Product admin
Registration key
13936496


 **Westlaw**
Registration key
13936495

Next, make any desired changes to the Last name, Position, Email, Phone number, Permissions, and End date. Then, click **Save**.

The screenshot displays a user profile page for 'Skye C'. At the top left, there is a 'Back to User access' link. The user's profile includes a circular avatar icon, the name 'Skye C', and a status of 'Not registered'. A 'Remove Skye' link is located in the top right corner. The page is divided into two main sections: 'Personal details' and 'Products'. The 'Personal details' section contains fields for 'First name' (Skye), 'Last name' (empty), 'Contact ID' (0020613335), 'Position' (Non-attorney), 'Email' (empty), 'Phone (optional)' (empty), 'Permissions' (Billing, Manage Orders and Subscrip...), and 'End date (optional)' (empty). The 'Products' section is titled 'Products not yet registered' and includes a 'Send registration links' button. Below this, two product entries are listed: 'Firm Central' and 'Westlaw', each with a 'Registration key' of '13956495'. At the bottom of the 'Personal details' section, the 'Save' button is circled in black, and an orange arrow points to it from the left. A 'Cancel' link is also visible next to the 'Save' button.

You will see a popup confirmation window indicating that changes were made to the personal details.

Personal details edited



You've changed the personal details for **Skye C.**
It may take up to 15 minutes for these changes to appear in the user profile.

Confirmation number:
000356701649

[Back to User access](#)

If you navigate back to the **User access** tab, the status for the user will appear as **Updating user** until the changes are fully processed.

The screenshot shows the 'User access' interface. At the top, there are navigation tabs: Billing, **User access**, Orders, Reports, and Support. Below this, there are sub-tabs for 'Users' and 'Admins'. To the right, there are buttons for 'Export list to file' and 'Invite users'. A search bar is present with the placeholder text 'Enter name'. Below the search bar, the text 'Users by account with product access' is displayed. A table follows with the following columns: Name, Products, Status, Position, and Actions. The table contains seven rows of user data. The last row, for user 'C, Skye', has an orange arrow pointing to the name and another orange arrow pointing to the status 'Updating user', which is circled in black.

Name	Products	Status	Position	Actions
<input type="checkbox"/> 123, Hello	Firm Central	Not registered	Technical	⋮
<input type="checkbox"/> 12345, Testaccount Admin	Firm Central, Westlaw	Not registered	Non-attorney	⋮
<input type="checkbox"/> Adam, Testing	None	Not registered	Attorney	⋮
<input type="checkbox"/> Admin1202, Test1202	Firm Central, Westlaw	Not registered	Administrator	⋮
<input type="checkbox"/> Asx, Axxa	Firm Central	Not registered	Analyst	⋮
<input type="checkbox"/> Turner, Peter	Westlaw	Not registered	Attorney	⋮
<input type="checkbox"/> C, Skye	Firm Central, Westlaw	Updating user	Non-attorney	⋮

Add Administrator Users

Navigate to the **User access** tab. Next, click the **Admins** tab. Then, click **Invite users**.

The screenshot shows the 'User access' page. At the top, there are navigation tabs: Billing, **User access**, Orders, Reports, and Support. An arrow points to the 'User access' tab. Below the navigation, there are sub-tabs: **Users** and **Admins**. An arrow points to the 'Admins' sub-tab. To the right, there is a search bar with the text 'Search' and 'Enter name'. Below the search bar is a table with the following data:

Name	Permissions	Status	Actions
12345, Testaccount	User Access, View Orders and Subscriptions	Not registered	⋮
Adam, Testing	Billing, Manage Orders and Subscriptions, User Access	Registered	⋮
Lee, Apple	Billing, Manage Orders and Subscriptions, User Access	Registered	⋮
Lee, Apple	Billing, Manage Orders and Subscriptions, User Access	Not registered	⋮
C, Skye	Billing, Manage Orders and Subscriptions, User Access	Not registered	⋮

On the right side of the page, there is a button labeled '+ Invite users' which is circled in orange. An arrow points to this button.

From the Admins box on the right, select **+ Invite admins**.

The screenshot shows the 'Invite users' page. At the top left, there is a link '← Back to User access'. The main heading is 'Invite users' with the subtext 'Choose which role to assign new users. You can always update them later.' Below this, there are two panels:

- Users**: Invite new users and assign them product access. Below this is a button '+ Invite users'.
- Admins**: Invite new admins to help manage your account. Below this is a button '+ Invite admins' which is circled in orange. An arrow points to this button.

Add a first and last name, email address, and select the permissions you want to provide to that user from the dropdown menu. Then, click **Continue**.

← Back to User access

Invite admins

Enter up to 5 admins. If they need access to products, you can edit their profiles once they register.

Admin details

Contact 1

First name

Last name

Billing
View and pay invoices

Manage Orders and Subscriptions
Manage Orders and Subscriptions

Manage Tickets
Manage Tickets

User Access
Add, edit and delete users

View Orders and Subscriptions
View Orders and Subscriptions

+ Add another user

Account

Name: ****TEST FOR FIRM CENTRAL **TESTING ONLY****

Account: **100**

Address: **610 OPPERMAN DR
EAGAN VT USA**

Continue Cancel

To add additional administrators, click + **Add another user** on the left side.

← Back to User access

Invite admins

Enter up to 5 admins. If they need access to products, you can edit their profiles once they register.

Admin details

Contact 1

First name	Last name	Permissions
<input type="text" value="Sadie"/>	<input type="text" value="P"/>	<input type="text" value="Billing, User Access, Manage..."/>

Email

+ Add another user

Account

Name: ****TEST FOR FIRM CENTRAL **TESTING ONLY****

Account: **100**

Address: **610 OPPERMAN DR
EAGAN VT USA**

Continue Cancel

Under **Contact 2**, add a first and last name, email address, and select their permissions from the dropdown menu. Then, click **Continue**.

← Back to User access

Invite admins

Enter up to 5 admins. If they need access to products, you can edit their profiles once they register.

Admin details

Contact 1 Remove X

First name: Last name: Permissions:

Email:

Contact 2 Remove X

First name: Last name: Permissions:

⊗ Enter a first name.

Email:

+ Add another user

Account

Name: **TEST FOR FIRM CENTRAL **TESTING ONLY**

Account: 100

Address: 610 OPPERMAN DR
EAGAN VT USA

Then, click **Invite admins**.

← Back to User access

Review details

Invites will get sent directly to admins after submitting.

Admin details [Edit admin details](#)

Name	Permissions	Email
Sadie P	Billing, User Access, Manage Orders and Subscriptions	sadie.p@abc.com

Account

Name: ****TEST FOR FIRM CENTRAL **TESTING ONLY****

Account: **100**

Address: **610 OPPERMAN DR
EAGAN VT USA**

Confirmation email

Once access is available, we'll send registration links directly to each invited admin.

Invite admins [Cancel](#)

After clicking Invite admins, you will receive confirmation similar to the one below.

← Back to User access

Admins invited

You've invited one person with admin permissions.

Once they finish registering, they will show as "registered" in their profile

Invited by:

Back to User access

If you navigate back to the **User access** tab, you will see a blue box notification that a new user was added. Also, you can see the new user listed under the **Admins** tab.

The screenshot displays the 'User access' section of the portal. At the top, navigation tabs include Billing, User access (selected), Orders, Subscriptions, Reports, and Support. A notification box in the center reads 'Added 1 admin' and notes that it may take up to 30 minutes for systems to reflect the change. Below the notification, there are tabs for 'Users' and 'Admins' (selected), along with an 'Invite users' button. A search bar is present with the placeholder text 'Enter name'. The main content is a table of users with columns for Name, Permissions, Status, and Actions.

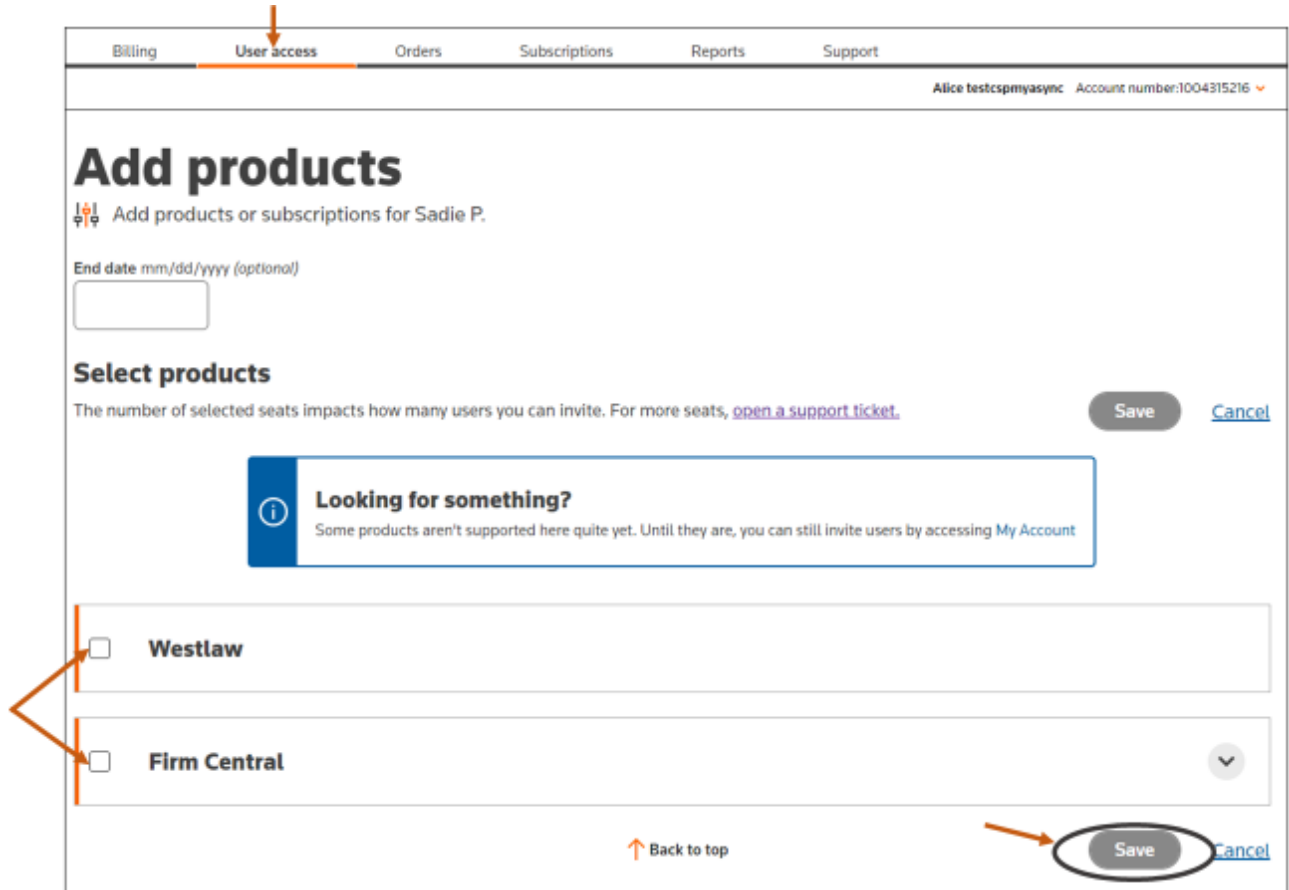
Name	Permissions	Status	Actions
12345, Testaccount	User Access, View Orders and Subscriptions	Not registered	
Adam, Testing	Billing, Manage Orders and Subscriptions, User Access	Registered	
Lee, Apple	Billing, Manage Orders and Subscriptions, User Access	Registered	
Lee, Apple	Billing, Manage Orders and Subscriptions, User Access	Not registered	
CSPQA, Alice	Billing, Manage Orders and Subscriptions, User Access	Not registered	
Circa, Ella	Billing, Manage Orders and Subscriptions, User Access	Registered	
Dora, Robert	Billing, Manage Orders and Subscriptions, User Access	Not registered	
testtest, apple	Billing	Not registered	
Morton, Cally	Manage Orders and Subscriptions	Registered	
R, Sadie	Billing, Manage Orders and Subscriptions, User Access	Not registered	

Next, from the **Admins** tab, click on a user's name. Then, click **Add products**.

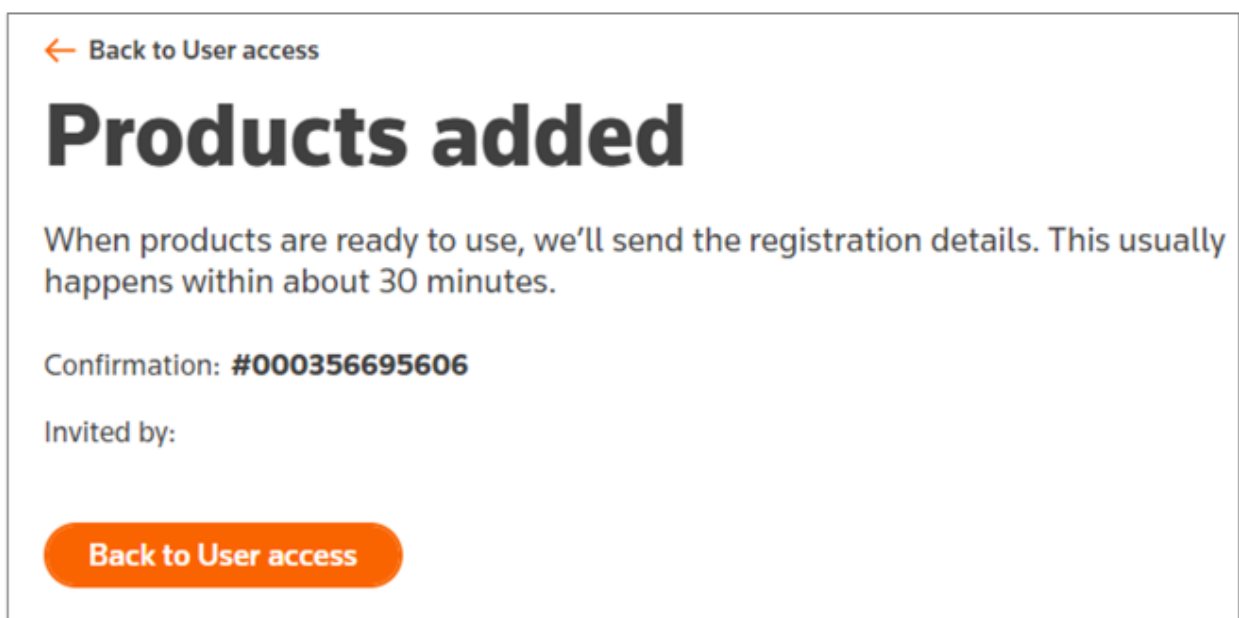
The screenshot shows a user profile page for 'Sadie P' with a status of 'Not registered'. The page is divided into several sections:

- Header:** Includes a 'Back to User access' link, a profile icon, the name 'Sadie P', the status 'Not registered', and a 'Remove user' link.
- Personal details:** A section with an 'Edit' link containing fields for Name (Sadie P), Email (sadie.p@abc.com), and Phone (N/A). It also lists permissions: Billing, Manage Orders and Subscriptions, and User Access.
- Account details:** A section with an 'Invite user' link and a 'Resend invite' button. The text below the link states: 'We'll email this person again with the registration link.'
- Products:** A section with the text 'This person doesn't have access to products yet.' and an illustration of various devices. An 'Add products' button is located in the top right corner of this section and is circled with an orange arrow.

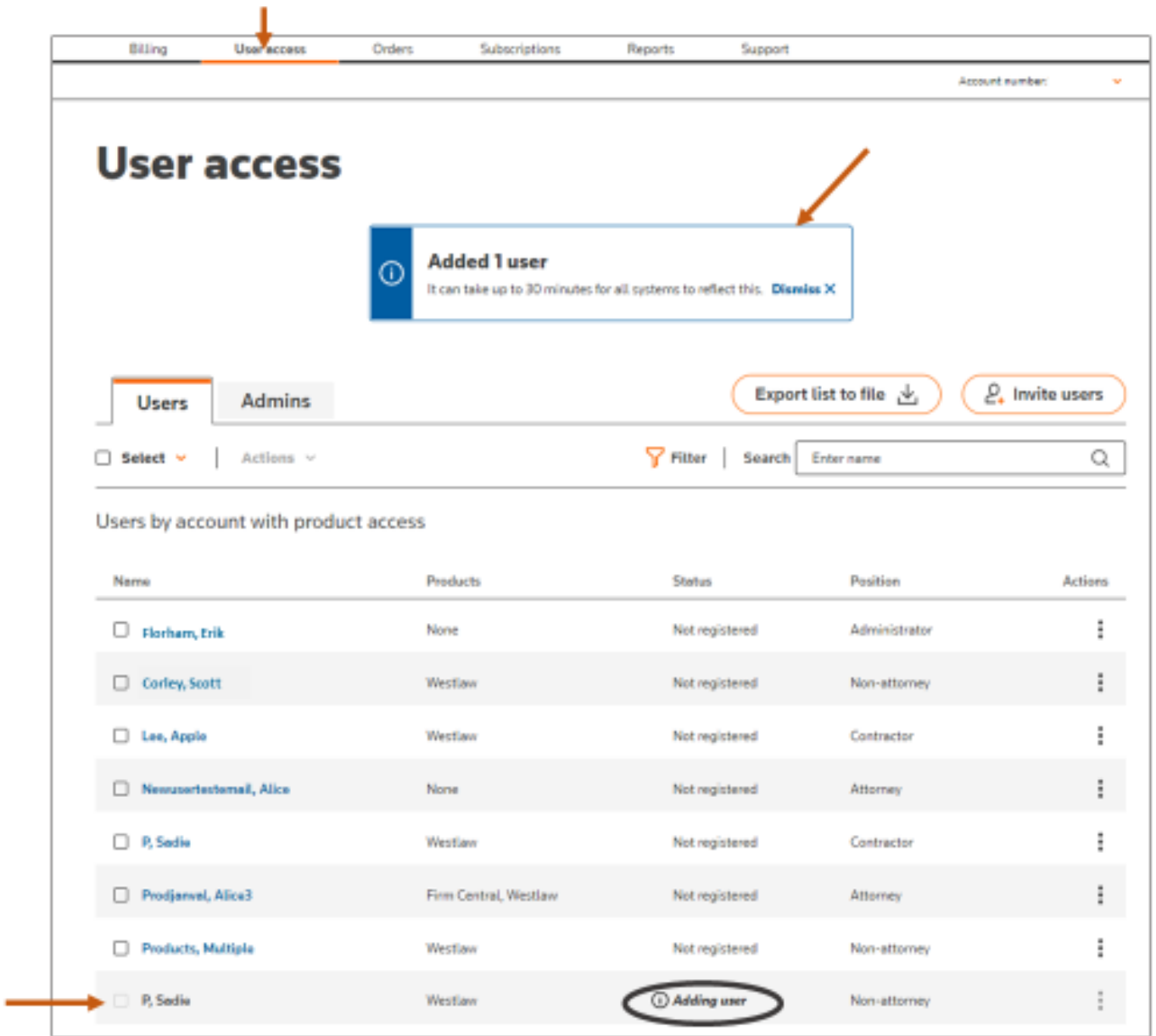
Next, select desired products. Then, click **Save**.



After clicking Save, you will receive a confirmation similar to the one below.



If you Navigate back to the **User access** tab, you will see a blue box notification that a new user was added. Also, you can see the new user listed under the **Users** tab.



Remove an Admin User

Navigate to the **User access** tab and select the **Admins** tab. Next, follow the steps for removing a user in the section Manage Product Users: Remove Users in this guide.

Resend Invitation to an Admin User


To resend an invitation to an administrator, navigate to the **User Access** tab and click on the **Admins** tab. Next, click on the user to whom you want to resend the invite.

The screenshot shows the 'User access' section of a self-service portal. At the top, there are navigation tabs: Billing, User access (selected), Orders, Reports, and Support. Below these, there are sub-tabs: Users and Admins (selected). A search bar is present with the placeholder text 'Enter name'. An 'Invite users' button is located in the top right corner. A table below lists users with the following columns: Name, Permissions, Status, and Actions.

Name	Permissions	Status	Actions
Singh, Carol	Manage Orders and Subscriptions	Registered	⋮
P, Sadie	Billing, Manage Orders and Subscriptions, User Access	Not registered	⋮
P, Sadie	Billing	Not registered	⋮

Next, in the **Account details** box, click **Resend invite**.

← Back to User access

 **Sadie P**
Status: **Not registered**

[Remove user](#)

Personal details [Edit](#)

Name
Sadie P

Email
sadie.p@abc.com

Phone
N/A

Permissions
Billing
Manage Orders and Subscriptions
User Access


Products [Add products](#)

This person doesn't have access to products yet.

Account details

Invite user
We'll email this person again with the registration link.

Resend invite



After clicking Resend invite, you will see a green box similar to the one below indicating that the invite was sent.

The screenshot shows a user management interface for a user named Sadie P. At the top left, there is a back arrow and the text "Back to User access". The user's name "Sadie P" is displayed in large font, with a status of "Not registered" below it. A "Remove user" link is located in the top right corner. The interface is divided into three main sections: "Personal details", "Products", and "Account details".

- Personal details:** Includes fields for Name (Sadie P), Email (sadie.p@abc.com), and Phone (N/A). Under "Permissions", it lists "Billing", "Manage Orders and Subscriptions", and "User Access". An "Edit" link is present.
- Products:** A message states "This person doesn't have access to products yet." with an "Add products" link. An illustration of various devices (laptop, tablet, smartphone) and documents is shown.
- Account details:** Includes an "Invite user" section with the text "We'll email this person again with the registration link."

A green confirmation box at the bottom center displays a checkmark icon, the text "Invite sent", and a close "X" icon. An orange arrow points to this box.

Reset Password for an Admin User

Navigate to the **User access** tab and select the **Admins** tab. Next, click the admin user's name.

The screenshot shows the 'User access' page in the Thomson Reuters self-service portal. At the top, there are navigation tabs: 'Billing', 'User access' (selected), and 'Support'. Below this, there's a search bar and an 'Invite users' button. The main content area has two sub-tabs: 'Users' and 'Admins' (selected). Below the sub-tabs is a search bar with the placeholder text 'Enter name'. A table lists users with the following columns: Name, Permissions, Status, and Actions. The user 'Clone, Test' is highlighted with an orange arrow pointing to its name.

Name	Permissions	Status	Actions
10048	Billing, User Access	Registered	⋮
Brent, Kevin	Billing, User Access	Registered	⋮
bikeneu, electric	Billing, User Access	Not registered	⋮
Clone, Test	Billing, User Access	Registered	⋮

Next, click **Reset password** on the right side.

The screenshot shows a user profile page for 'Test Clone' with a status of 'Registered'. The page is divided into several sections:

- Header:** Includes a 'Back to User access' link, a user profile icon, the name 'Test Clone', and the status 'Registered'. On the right, there are two buttons: 'Remove user' and 'Reset password'. An orange arrow points to the 'Reset password' button, which is also circled in orange.
- Personal details:** A section with an 'Edit' link. It lists:
 - Name: **Test Clone**
 - Email: **test.clone@tr.com**
 - Phone: **N/A**
 - Permissions: **Billing** and **User Access**
- Account details:** A section listing:
 - OnePass username
 - Registration key
 - Last sign-in: **Feb 03, 2022 06:11 am**
- Products:** A section with an 'Add products' link. It contains the text 'This person doesn't have access to products yet.' and an illustration of various devices (laptop, tablet, smartphone) and books.

Then, select whether to send a link to the user's associated email address or to generate a temporary password to send to the user. Then, click **Continue**.

Reset password

Help **Test Clone** recover access to their products and account.

OnePass username

Reset by

- Sending a link to their associated email
- Generating a temporary password to send them

Continue [Back](#)

ORDERS

We anticipate the Print Order tasks shown in this section will be available in 2024.

View Print Order


Navigate to the **Orders** tab. Next, enter the **Order number**. Then, click **Go**.



Then, view the Print Order details.

[Print Orders](#) / 0205

Order 020500000 details

 **Shipping and payment information**

<p>Placed on 06/19/2022</p> <p>Order status Shipped</p>	<p>Ship to TESTING ACCOUNT PAYABLE 5230 FRONT BLVD SUNNYVALE, AZ 92618</p>	<p>PO Number 87</p> <p>Total amount (USD) \$599.09</p>
---	---	--

[Start a return](#) [Return policy](#)

[Start a reship](#)

1 item in your order

Item ↓	Quantity ↑↓	Delivery number ↑↓	Shipped on ↑↓	Posting number ↑↓
TRG CA PRACTICE ALTERNATIVE DISPUTE RESOLUTION CH6-8 2021 CONTENT	2	0441	07/04/2022	614


Viewing 1 - 1 Rows per page

Returning Items (Start a return)

To return one or more items from an order, navigate to the relevant Order details page. Then, click **Start a return** on the right side.

Print Orders / 0205

Order 020500000 details

 Shipping and payment information

Placed on 06/19/2022	Ship to TESTING ACCOUNT PAYABLE 5230 FRONT BLVD SUNNYVALE, AZ 92618	PO Number 87
Order status Shipped		Total amount (USD) \$599.09

[Return policy](#)

Start a return

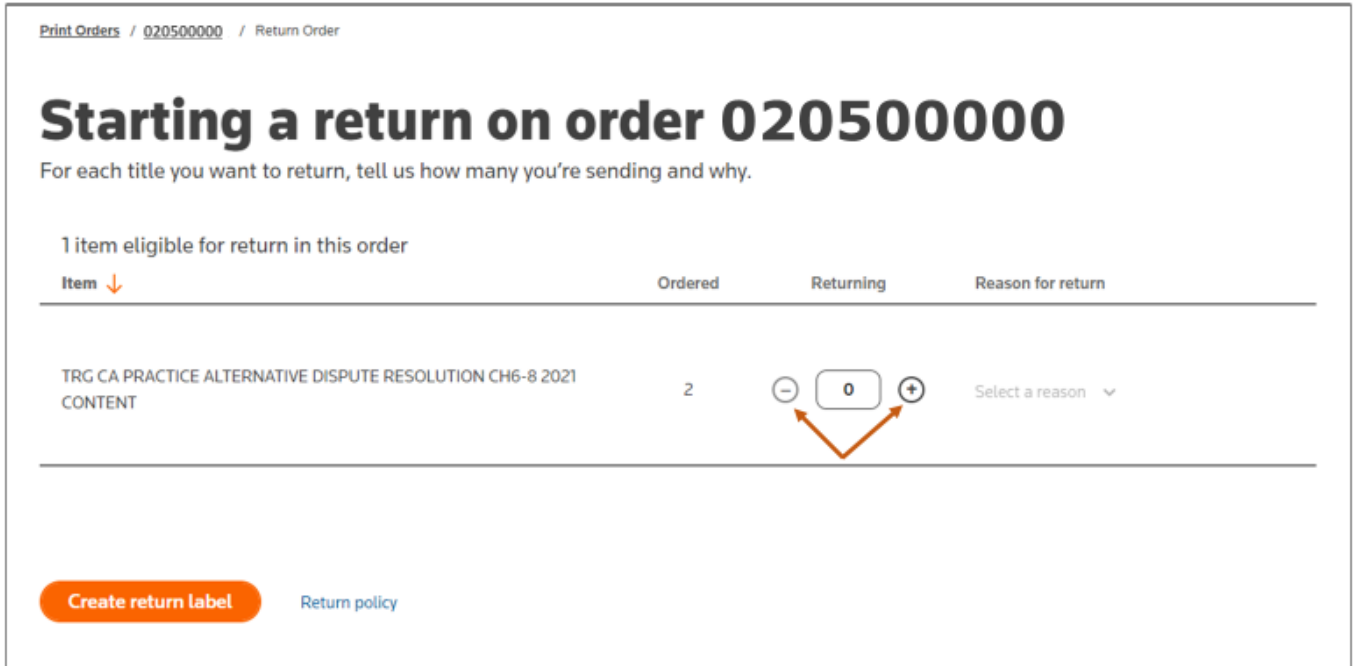
Start a reship

1 item in your order

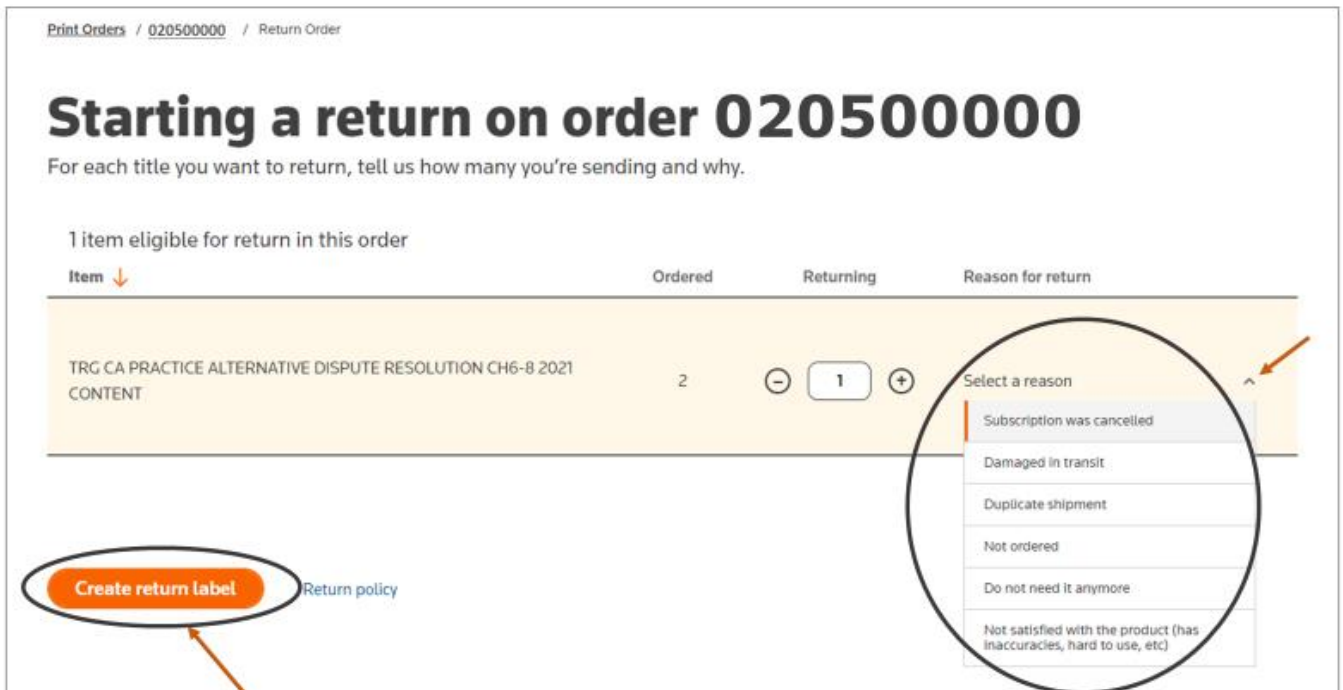
Item ↓	Quantity ↑↓	Delivery number ↑↓	Shipped on ↑↓	Posting number ↑↓
TRG CA PRACTICE ALTERNATIVE DISPUTE RESOLUTION CH6-8 2021 CONTENT	2	0441	07/04/2022	614

Viewing 1 - 1 Rows per page 10 ▼

Next, use the plus and minus buttons to select the number of items you want to return.




Next, click the carrot next to **Select a reason** and select the reason for returning the item from the dropdown menu. Then, click **Create return label**.





Next, click **Print return label**.

[Print Orders](#) / [020500000](#) / [Return Order](#)


Print the return label

 Print the return label, then follow the steps to ensure a successful return.

 **Print return label** [Search for a new order](#)



The return label will download as a PDF document that you can print. It will look similar to the below. Follow the directions for attaching the return label and mailing the item back to Thomson Reuters.


From: TESTING ACCOUNT PAYABLE 5230 FRONT BLVD SUNNYVALE, AZ 92618	Box _____ of _____												
 Delivery number: 0441 West – A Thomson Reuters business Returns 100 Helpful Rd Eagan MN 55123-1310													
----- Detach here -----													
Return label	 THOMSON REUTERS												
Account number: 100 TESTING ACCOUNT PAYABLE 5230 FRONT BLVD SUNNYVALE, AZ 92618	<i>Printed on 07/28/2022 at 2:38:57 pm</i>												
Order number: 020500000													
<table border="0" style="width: 100%;"><thead><tr><th style="text-align: left;">Delivery number</th><th style="text-align: left;">Description</th><th style="text-align: left;">Returning</th><th style="text-align: left;">Reason</th></tr></thead><tbody><tr><td colspan="4"><hr/></td></tr><tr><td>0441</td><td>TRG CA PRACTICE ALTERNATIVE DISPUTE...</td><td>1</td><td>Damaged in transit.</td></tr></tbody></table>		Delivery number	Description	Returning	Reason	<hr/>				0441	TRG CA PRACTICE ALTERNATIVE DISPUTE...	1	Damaged in transit.
Delivery number	Description	Returning	Reason										
<hr/>													
0441	TRG CA PRACTICE ALTERNATIVE DISPUTE...	1	Damaged in transit.										

Return Policy

To view the Thomson Reuters' return policy, navigate to the relevant Order details page. Next, click **Return policy** on the right side.

Print Orders / 0205

Order 020500000 details

 Shipping and payment information

Placed on 06/19/2022	Ship to TESTING ACCOUNT PAYABLE 5230 FRONT BLVD SUNNYVALE, AZ 92618	PO Number 87
Order status Shipped		Total amount (USD) \$599.09

[Start a return](#)

[Start a reship](#)

[Return policy](#)

1 item in your order

Item ↓	Quantity ↕	Delivery number ↕	Shipped on ↕	Posting number ↕
TRG CA PRACTICE ALTERNATIVE DISPUTE RESOLUTION CH6-8 2021 CONTENT	2	0441	07/04/2022	614

Viewing 1 – 1 Rows per page 10 ▼

Next, view the return policy terms and conditions.

Returns: Terms and conditions

By proceeding to generate the packing slip for your return to us, you're agreeing to the terms and conditions outlined here:

Timing

For a successful return, we must receive the unwanted products no later than the 45th day after their ship dates. Any returns received on the 46th day onwards unfortunately will be ineligible for both credit and reshipment. The ship date for each ordered product can be found on its order detail page and is also indicated on the packing slip included with each shipment.

Exclusions

Currently we offer credit for returns on a subset of our products and only when purchased under general terms.

These products are ineligible, as mentioned on their order forms:

- Online products
- Hosted products
- Software products
- ProView eBook products

Products that were included within our most favorable programs are also ineligible for individual cancellation and refundable returns. Such programs include but are not limited to:

- Library Maintenance Agreement
- Library Management Arrangement
- Library Savings Plan
- West Complete
- Assured Print Pricing
- WestPack
- Special Offer agreements

Costs

We (Thomson Reuters) do not cover any of the expenses related to your return, and all applicable discounts are forfeited when returning part of a promotional sale.

Packing

For timely processing, place the returning products in their original packaging. Make sure to enclose a copy of the delivery slip or order invoice along with a brief explanation of the reason for the return. Use a shipping method with tracking, and add insurance in the amount of the purchased value.

Status


You can verify our receipt of your return and any credit applied in the Returns History section of My Account.

Reshipping Items (Start a Reship Request)

To request the reshipment of one or more items from an order, navigate to the relevant Order details page. Next, click **Start a reship**.

Print Orders / 0205

Order020500000 details

 Shipping and payment information

Placed on 06/19/2022	Ship to TESTING ACCOUNT PAYABLE 5230 FRONT BLVD SUNNYVALE, AZ 92618	PO Number 87
Order status Shipped		Total amount (USD) \$599.09

[Start a return](#) [Return policy](#)
Start a reship

1 item in your order

Item ↓	Quantity ↓	Delivery number ↓	Shipped on ↓	Posting number ↓
TRG CA PRACTICE ALTERNATIVE DISPUTE RESOLUTION CH6-8 2021 CONTENT	2	0441	07/04/2022	614

Viewing 1 – 1 Rows per page 10 ↓

Next, use the plus and minus buttons to select the number of items you want reshipped.

Print Orders / 020500000 / Start a reship request

Start a reship request for order 020500000

For each item you want to reship, tell us what went wrong.

1 item eligible for reshipment

Item ↓	Ordered	Reshipping	Reason for reship
TRG CA PRACTICE ALTERNATIVE DISPUTE RESOLUTION CH6-8 2021 CONTENT	2	<input type="button" value="-"/> <input style="width: 40px; text-align: center;" type="text" value="0"/> <input type="button" value="+"/>	Select a reason ↓

Continue
Cancel

Next, click the carrot next to **Select a reason** and select the reason for requesting the reshipment from the dropdown menu. Then, click **Continue**.

[Print Orders](#) / [020500000](#) / [Start a reship request](#)

Start a reship request for order 020500000

For each item you want to reship, tell us what went wrong.

1 item eligible for reshipment


Item ↓	Ordered	Reshipping	Reason for reship
TRG CA PRACTICE ALTERNATIVE DISPUTE RESOLUTION CH6-8 2021 CONTENT	2	− 1 +	<div style="border: 1px solid #ccc; padding: 2px;">Select a reason</div> <ul style="list-style-type: none">Lost shipmentDamageDefectiveWrong product sent

Continue [Cancel](#)

Then, review the reship request details. If any changes are required, follow the steps outlined below for removing an item, editing the shipping address, or changing the shipping method. If all details are correct, click **Submit**.

[Print Orders](#) / [020500000](#) / [Start a reship request](#) / Review reship request

Review reship request for order 020500000

 **Original order:** 020500000

<p>Ship To TESTING ACCOUNT PAYABLE 5230 FRONT BLVD SUNNYVALE, AZ 92618</p> <p>Edit address</p>	<p>Ship Via U.S. ground service (free) Edit shipping method</p>
---	--

Item(s) to be reshipped


Item ↓	Reshipping	Reason for reship	Remove an Item
TRG CA PRACTICE ALTERNATIVE DISPUTE RESOLUTION CH6-8 2021 CONTENT	1	Damage	✕ Remove

[Submit](#) [Back](#)

After clicking Submit, you will see a confirmation box similar to the below.

[Print Orders](#) / [020500000](#) / Reship requested

Reship requested for order 020500000

 Your reship request was sent to our support team. We'll send you an email once the reship order has been processed. This usually takes 1 to 2 days.

Confirmation: **000356714326**


[Go back to all orders](#)

Remove an Item

To remove an item from a reship request, navigate to the Review reship request details page. Then, click **X Remove** to the right of the item you want to remove.

[Print Orders](#) / [020500000](#) / [Start a reship request](#) / Review reship request

Review reship request for order 020500000

 **Original order:** 020500000

Ship To TESTING ACCOUNT PAYABLE 5230 FRONT BLVD SUNNYVALE, AZ 92618 Edit address	Ship Via U.S. ground service (free) Edit shipping method
--	---

Item(s) to be reshipped

Item ↓	Reshipping	Reason for reship	Remove an item
TRG CA PRACTICE ALTERNATIVE DISPUTE RESOLUTION CH6-8 2021 CONTENT	1	Damage	X Remove


Submit
[Back](#)

Edit Shipping Address

To make changes to the shipping address, navigate to the Review reship request details page and click **Edit address**.

[Print Orders](#) / [020500000](#) / [Start a reship request](#) / Review reship request

Review reship request for order 020500000

 **Original order:** 020500000

Ship To
TESTING ACCOUNT
PAYABLE
5230 FRONT BLVD
SUNNYVALE, AZ 92618

Ship Via
U.S. ground service (free)
[Edit shipping method](#)

[Edit address](#)

Item(s) to be reshipped

Item ↓	Reshipping	Reason for reship	Remove an item
TRG CA PRACTICE ALTERNATIVE DISPUTE RESOLUTION CH6-8 2021 CONTENT	1	Damage	X Remove

[Submit](#) [Back](#)

Next, make any necessary changes to the shipping name and address. Then, click **Save and continue**.

[Print Orders](#) / [020500000](#) / [Start a reship request](#) / [Review reship request](#) / [Edit shipping address for reship](#)

Edit shipping address for reship

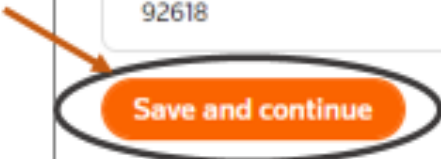
Original order: 020500000

Ship to

TESTING ACCOUNT PAYABLE
5230 FRONT BLVD SUNNYVALE, AZ, 92618

Enter new address

Name line 1	Name line 2 (optional)
<input type="text" value="TESTING"/>	<input type="text" value="ACCOUNT PAYABLE"/>
Address line 1	Address line 2 (optional)
<input type="text" value="5230 FRONT BLVD"/>	<input type="text"/>
Country	State/province
<input style="border: none; border-bottom: 1px solid #ccc; padding: 2px 10px 2px 10px;" type="text" value="United States"/> ▼	<input style="border: none; border-bottom: 1px solid #ccc; padding: 2px 10px 2px 10px;" type="text" value="Arizona"/> ▼
Zip/Postal	City
<input type="text" value="92618"/>	<input type="text" value="SUNNYVALE"/>


 **Save and continue** [Cancel](#)

Change Shipping Method

To change the shipping method, navigate to the review reship request details page and click **Edit shipping method**.

[Print Orders](#) / [020500000](#) / [Start a reship request](#) / Review reship request

Review reship request for order 020500000

 **Original order:** 020500000

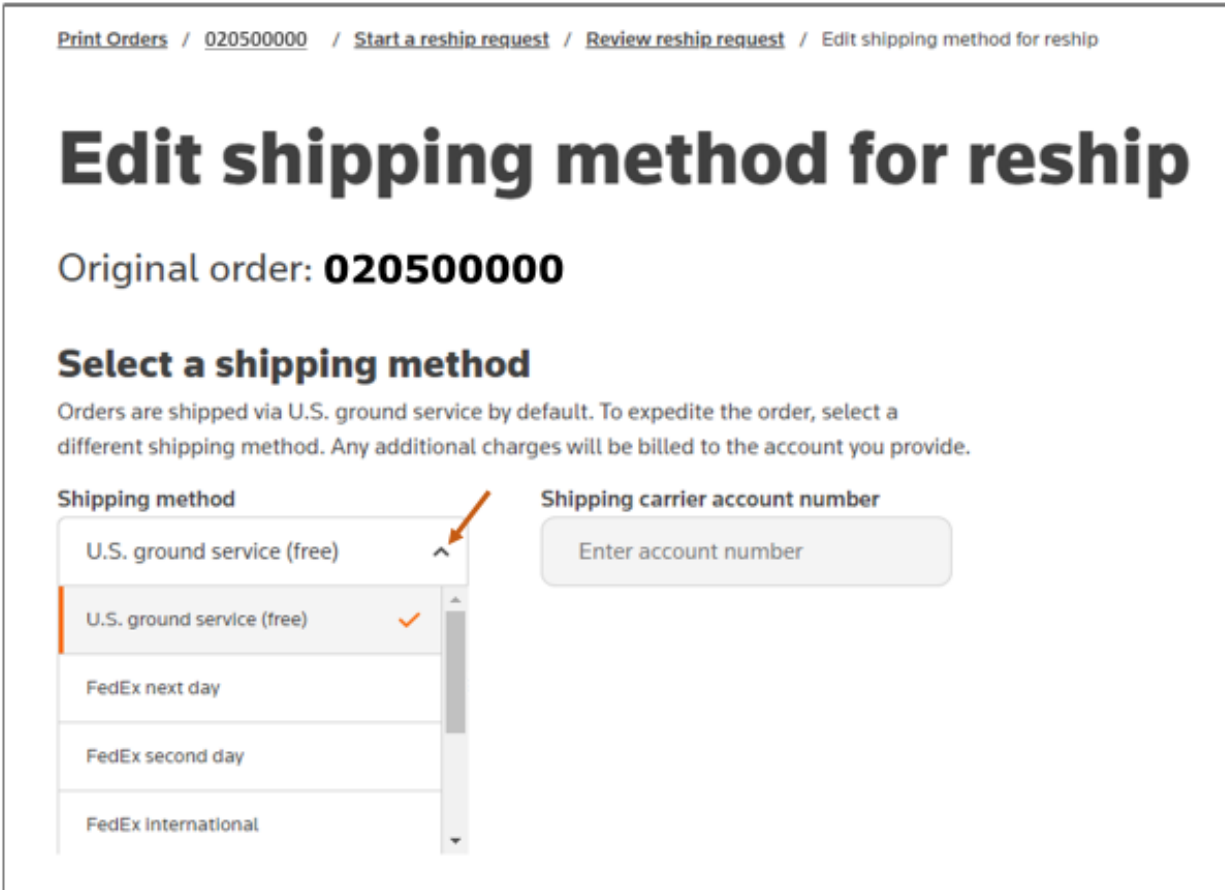
<p>Ship To TESTING ACCOUNT PAYABLE 5230 FRONT BLVD SUNNYVALE, AZ 92618</p> <p>Edit address</p>	<p>Ship Via U.S. ground service (free)</p> <p>Edit shipping method</p>
---	--

Item(s) to be reshipped

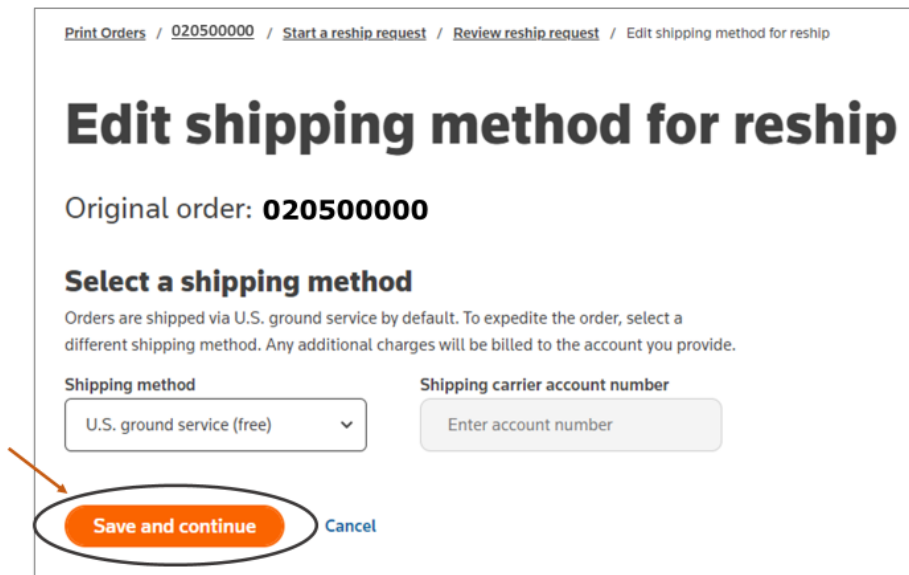
Item ↓	Reshipping	Reason for reship	Remove an item
TRG CA PRACTICE ALTERNATIVE DISPUTE RESOLUTION CH6-8 2021 CONTENT	1	Damage	X Remove

[Submit](#) [Back](#)

Next, click the carrot next to the Shipping method and select the desired shipping method from the dropdown menu.



Then, click **Save and continue**.



REPORTS

We anticipate that the reports shown in this section will be available in 2024.

Navigate to the **Reports** tab to obtain various types of reports.

The screenshot shows a navigation bar with tabs for Billing, User access, Orders, Reports, and Support. The Reports tab is highlighted with an orange underline and an arrow pointing to it. Below the navigation bar, the main content area is titled "Reports" with a sub-header "Get exports of system data to support auditing and other offline activities." There are four report cards displayed: "Shipment history" (with a truck icon), "User list" (with a person icon), "Library maintenance agreement" (with a book icon), and "Account reconciliation" (with a document icon). Each card includes a brief description of the report's function.

Billing User access Orders **Reports** Support

Account number:

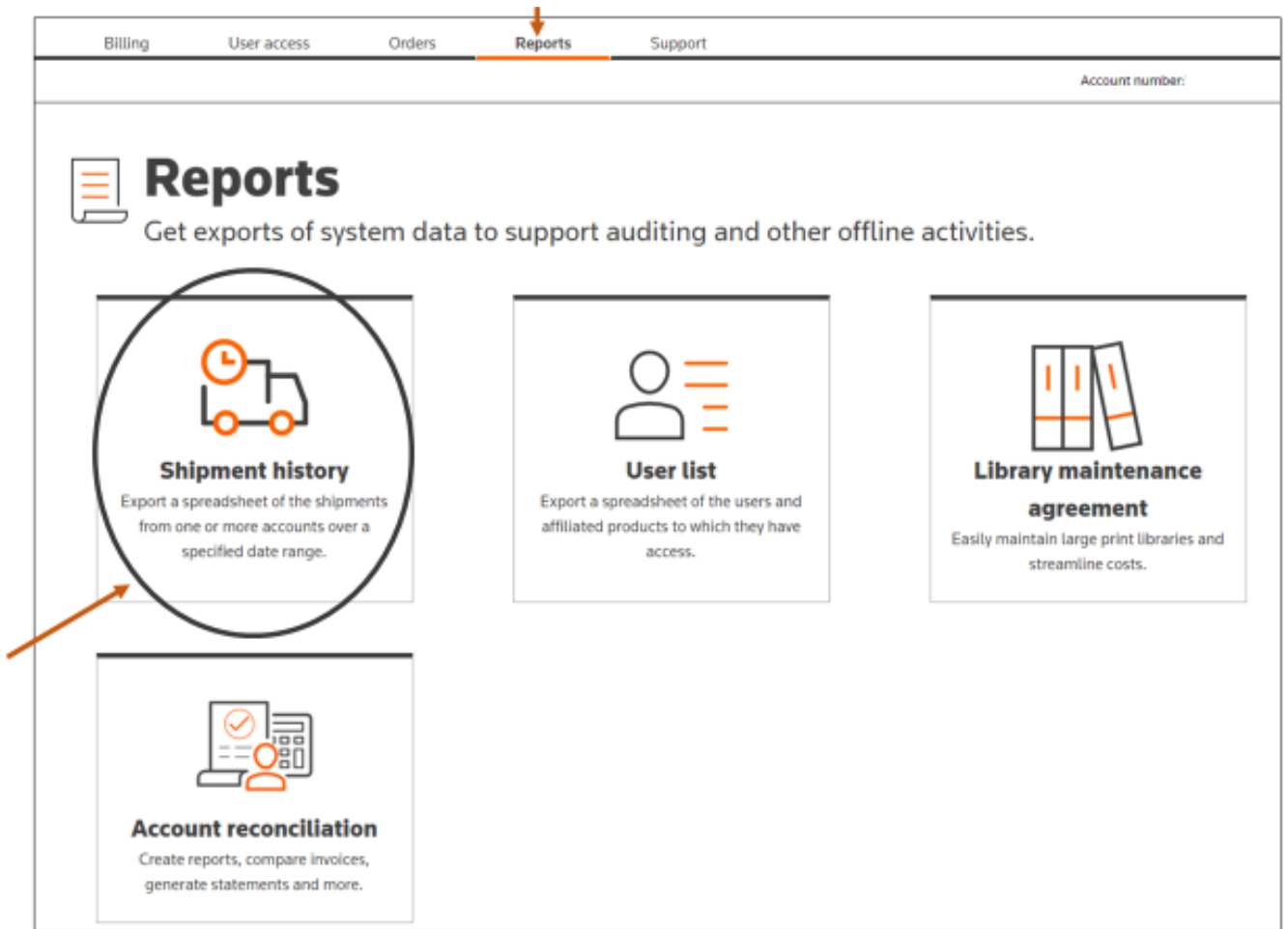
Reports

Get exports of system data to support auditing and other offline activities.


- Shipment history**
Export a spreadsheet of the shipments from one or more accounts over a specified date range.
- User list**
Export a spreadsheet of the users and affiliated products to which they have access.
- Library maintenance agreement**
Easily maintain large print libraries and streamline costs.
- Account reconciliation**
Create reports, compare invoices, generate statements and more.

Shipping History Report

Navigate to the **Reports** tab and click **Shipment history**.





A list of previously created shipping reports will appear in a chart. If no prior shipping history report exists, you will see a message similar to the one below.



Shipment history reports

These reports help you look at large volumes of order shipments and can be useful for auditing or bulk purchases.

Create a report 



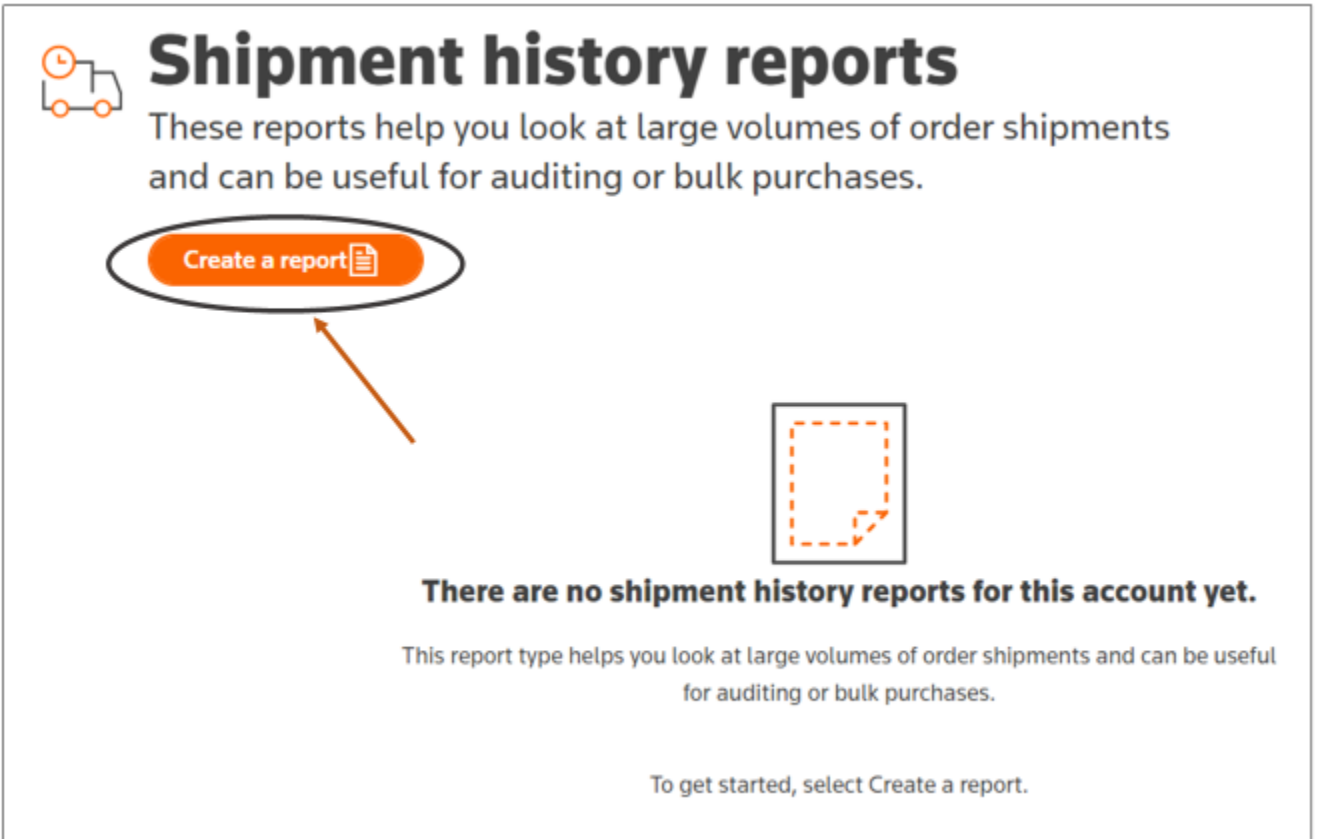
There are no shipment history reports for this account yet.


This report type helps you look at large volumes of order shipments and can be useful for auditing or bulk purchases.

To get started, select Create a report.


Create a Shipping History Report

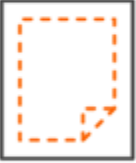
From the Shipment history reports page, click **Create a report**.



 **Shipment history reports**

These reports help you look at large volumes of order shipments and can be useful for auditing or bulk purchases.

Create a report 



There are no shipment history reports for this account yet.

This report type helps you look at large volumes of order shipments and can be useful for auditing or bulk purchases.

To get started, select Create a report.

The screenshot shows a user interface for 'Shipment history reports'. At the top left is a truck icon with a clock. The main heading is 'Shipment history reports'. Below it is a descriptive sentence. A prominent orange button labeled 'Create a report' with a document icon is circled in black, and an orange arrow points to it from below. To the right of the button is a dashed orange square icon. Below the icon is a bolded message: 'There are no shipment history reports for this account yet.' Underneath this message is another descriptive sentence. At the bottom, a final instruction reads: 'To get started, select Create a report.'

Next, provide a name for the shipping report, if desired, and choose the dates for the report. If you want to run the same report on a monthly basis, click the button next to **Repeat monthly** so it appears green with a check mark. Then, click **Continue to select accounts**. before clicking Continue.

Create a shipment history report

First, select the date range that the report should cover.

Report name (Optional)
Give the report a unique name.

Include shipment dates from:

- Previous calendar month
- Previous 90 days
- Custom date range

Repeat monthly

Repeat monthly


Continue to select accounts

Next, select the accounts on which you want to run a report. Then, click **Review report**.

To make any edits to the report name, selected accounts, date range or recurring status, click **Edit** next to the relevant change. Then, enter the desired changes. When the report details are correct, click **Save and run report**.

Then, you will see a notification box indicating that the report is processing.

We're running your report




This can take up to 4 hours, but you don't need to keep this page open. We'll email you at **currenttesting@mailinator.com** when the data is available for download.

[Back to shipment history reports](#)

If you navigate back to the Shipment history report page, you will see the status of the created report. Once the report is done processing, you can click on the report to view it.

Billing
User access
Orders
Reports
Support

Account number:



Shipment history reports

These reports help you look at large volumes of order shipments and can be useful for auditing or bulk purchases.

[Create a report](#)

Available and pending reports

Report name	Created on	Duration	Status	
Test1		Monthly	Pending	⋮

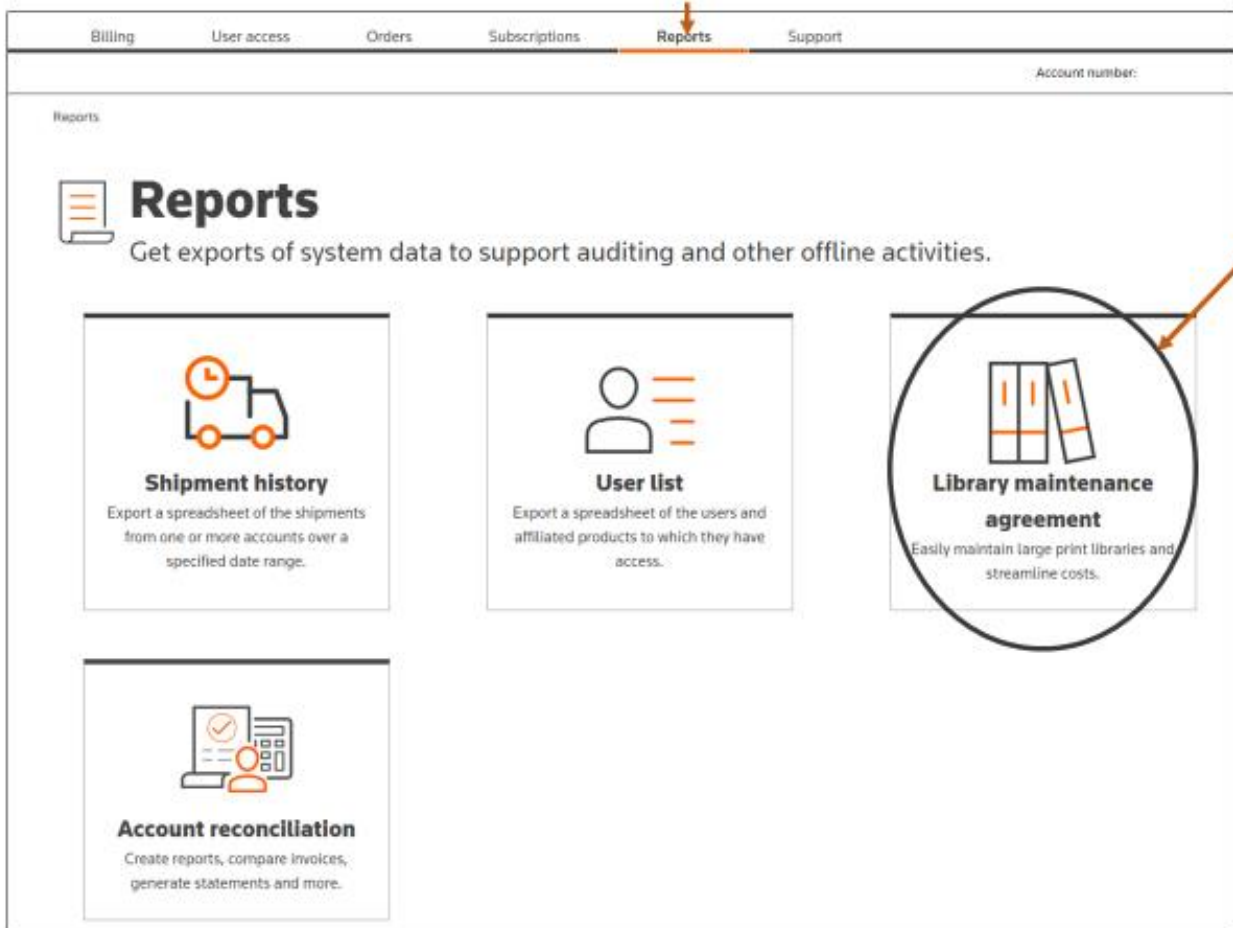
Viewing 1 - 1
Rows per page 10 ▼

User List Report

See section View users: Get a Report of Users.


Library Maintenance Agreements

Navigate to the **Reports** tab. Next, click **Library maintenance agreement**.



Then, click **Download the report**.

[Reports](#) / Library Maintenance Agreement



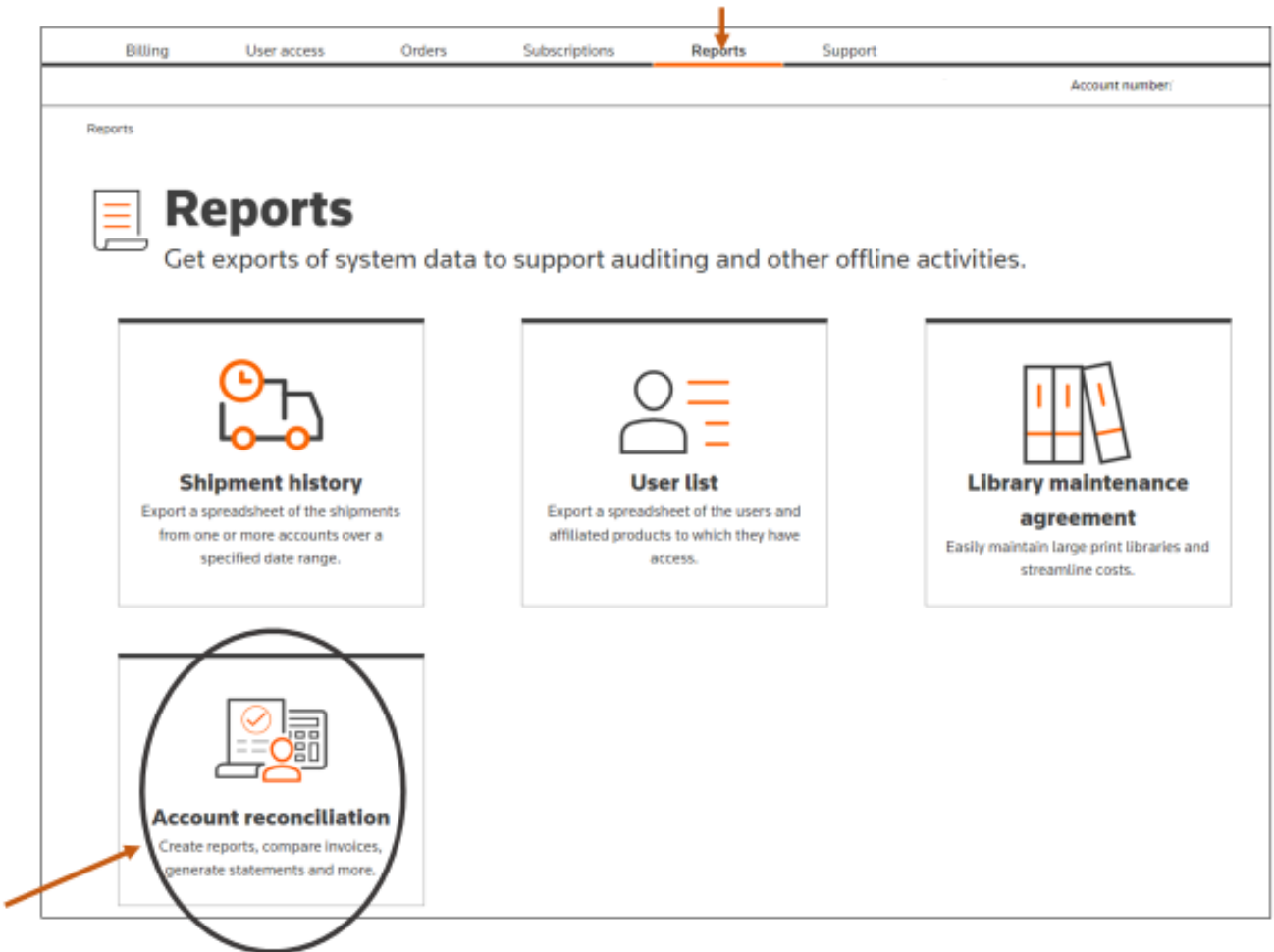
Library Maintenance Agreement (LMA)

A Library Maintenance Agreement helps you maintain large print libraries and streamline costs. Download your report to view detailed information about your current LMAs.

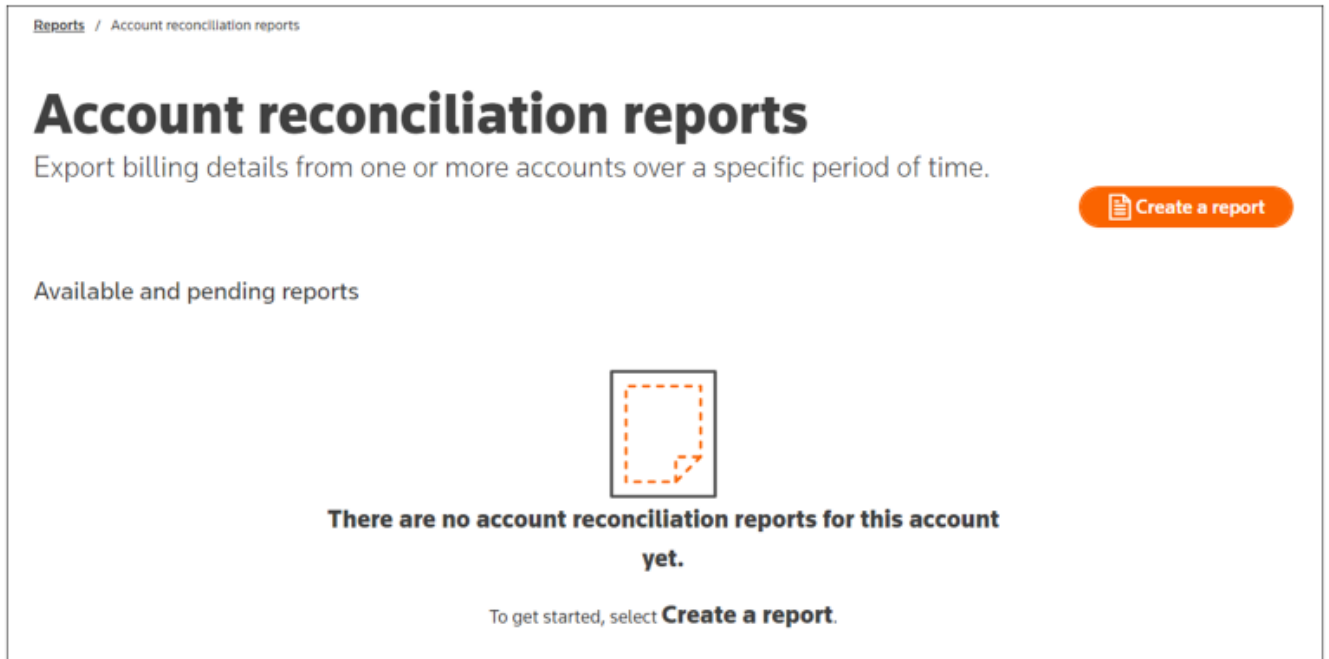
[Download the report](#)

Account Reconciliation Report

To view or create an account reconciliation report, navigate to the **Reports** tab and click **Account reconciliation**.

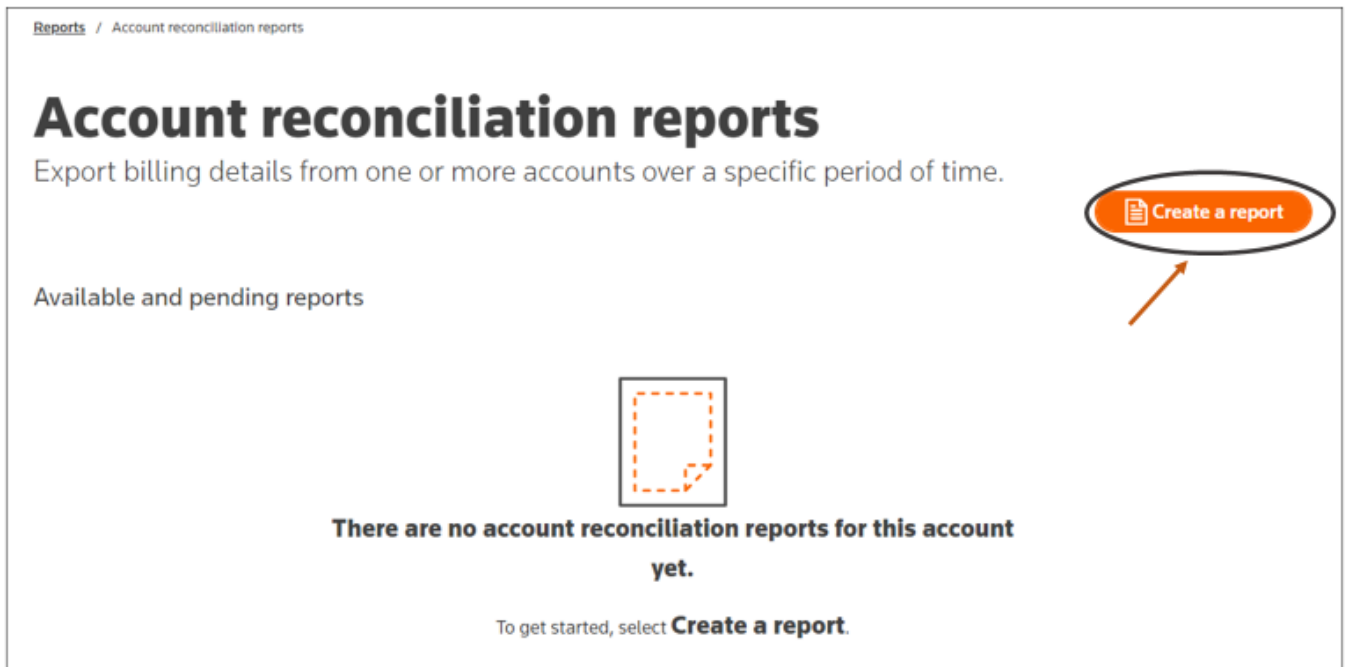


A list of previously created account reconciliation reports will appear in a chart. If no prior account reconciliation report exists, you will see a message similar to the one below.

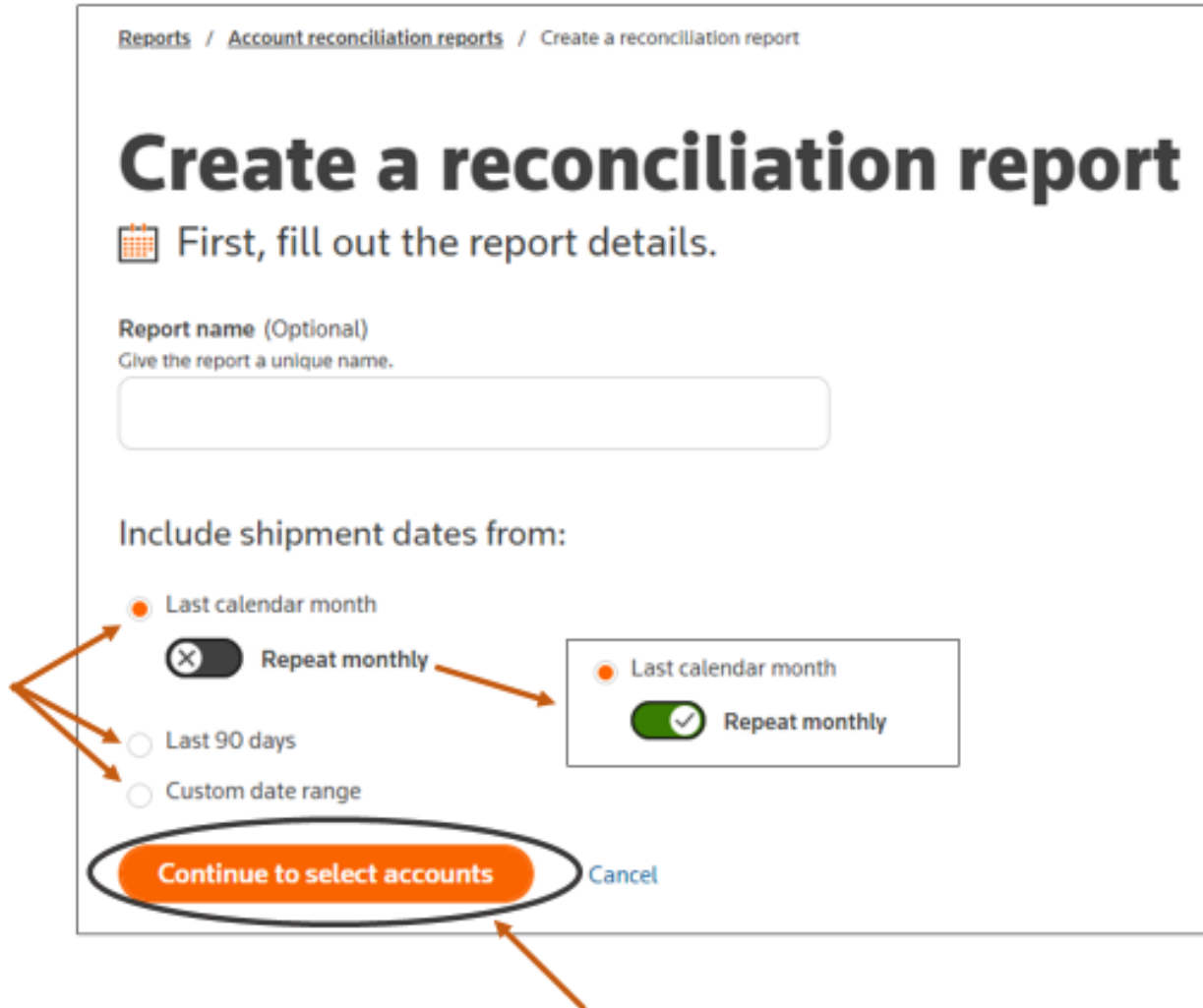


Create an Account Reconciliation Report

From the Account reconciliation reports page, click **Create a report.**



Next, provide a name for the reconciliation report, if desired, and choose the dates for the report. If you want to run the same report on a monthly basis, click the button next to **Repeat monthly** so it appears green with a check mark. Then, click **Continue to select accounts**.



Next, select the accounts on which you want to run a report. Then, click **Review report**.

Reports / Account reconciliation reports / Create a reconciliation report / Select accounts

Select accounts

Next, select the accounts you want to export account reconciliation for.

Available accounts list **Review report** [Cancel](#)

1 of 1 selected Search

Account ↓	Name	Address
<input checked="" type="checkbox"/> 100	**TEST FOR CENTRAL **TESTING ONLY**	610 OPPERMAN DR, EAGAN VT JSA

Viewing 1 - 1 Rows per page 10 ▾

To make any edits to the report name, selected accounts, date range or recurring status, click **Edit** next to the relevant change. Then, enter the desired changes. When the report details are correct, click **Save and run report**.

Reports / Account reconciliation reports / Create a reconciliation report / Select accounts / Review report details

Review report details

Now, review the report details. If everything looks good, save and run the report.

Report name **Test** [Edit](#) Duration **Last calendar month** [Edit](#) Recurring **No** [Edit](#)
Jun 01, 2022 to Jun 30, 2022


Selected accounts **100** [Edit](#)
****TEST FOR
 TESTING ONLY**

Save and run report [Cancel](#)

Then, you will see a notification box indicating that the report is processing.

[Reports](#) / [Account reconciliation reports](#) / Confirmation

We're running your report



This can take up to 4 hours, but you don't need to keep this page open. We'll email you at **apple.leetesting4658@mailinator.com** when the data is available for download.

[Back to reports](#)

If you navigate back to the account reconciliation reports page, you will see the status of the created report. Once the report is done processing, you can click on the report to view it.

[Reports](#) / [Account reconciliation reports](#)

Account reconciliation reports

Export billing details from one or more accounts over a specific period of time.

[Create a report](#)

Available and pending reports

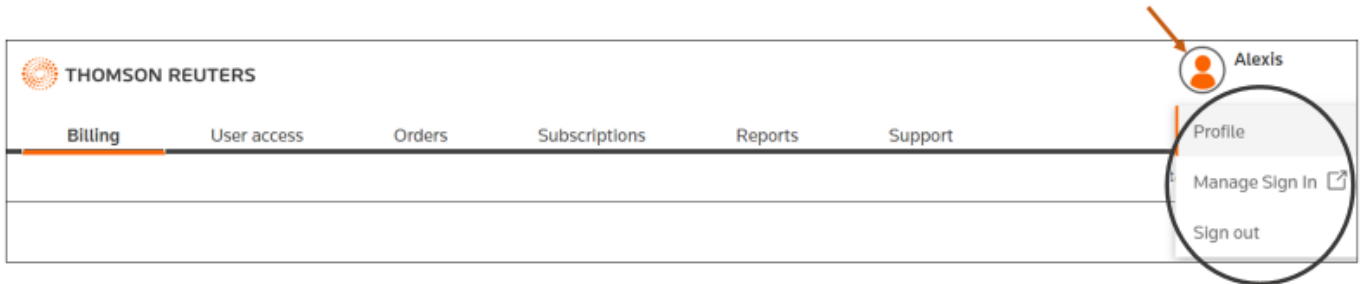
Report name ↓	Created on ↑↓	Duration	Status	
Test	Jul 29, 2022	Last calendar month May 31, 2022 to Jun 29, 2022	Pending	⋮ Actions

Viewing 1 - 1 Rows per page 10 ▾

MANAGE YOUR PROFILE

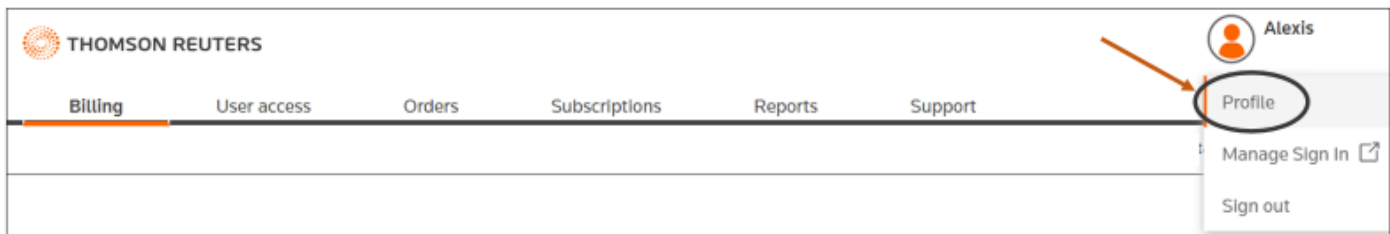
View Profile, Manage Sign In or Sign Out

Click the icon on the top right-hand side next to your name. Then, select either **Profile**, **Manage Sign In** or **Sign out**.



Profile

Click **Profile** from the icon on the top right-hand side next to your name.



After clicking Profile, your personal details will appear. To edit your "Last name" or "Phone number," click **Edit** on the right side of the **Personal details** box. Next, make any changes. Then click **Save**.



After clicking Save, you will see a green box confirming your profile was updated similar to the one below.

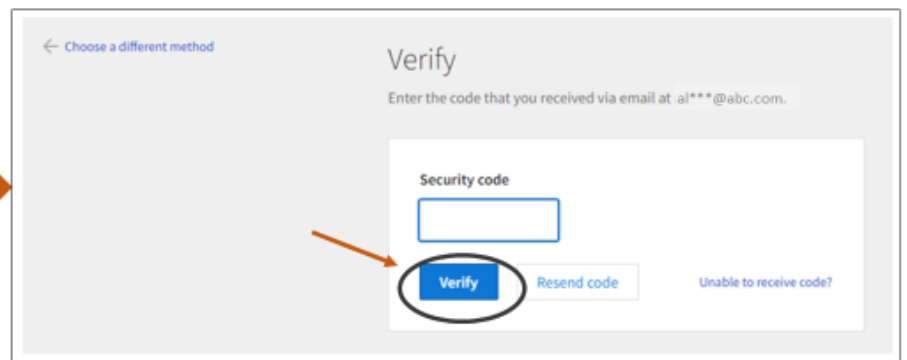
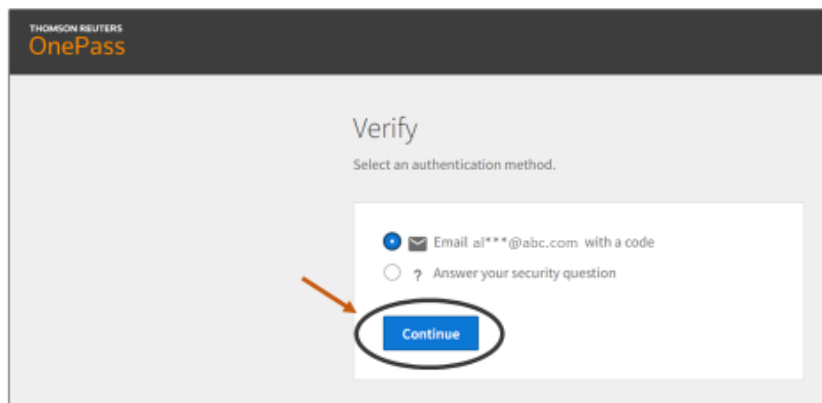
The screenshot displays a user profile interface. At the top left, there is a circular profile icon with an orange person silhouette, followed by the name **Alexis** and the status **Status: Registered**. Below this is a section titled **Personal details** with an [Edit](#) link. The details listed are: Name **Alexis**, Email **alexis.test@abc.com**, and Phone **N/A**. At the bottom of the page, a green notification box with a checkmark icon contains the text **Profile updated** and a close button (X). An orange arrow points from the notification box back to the profile details section. The Thomson Reuters logo is visible in the bottom left corner of the page.

Manage Sign In

To manage your Thomson Reuters OnePass, including products, profile, and security options, click **Manage Sign In** from the icon on the top right-hand side next to your name.

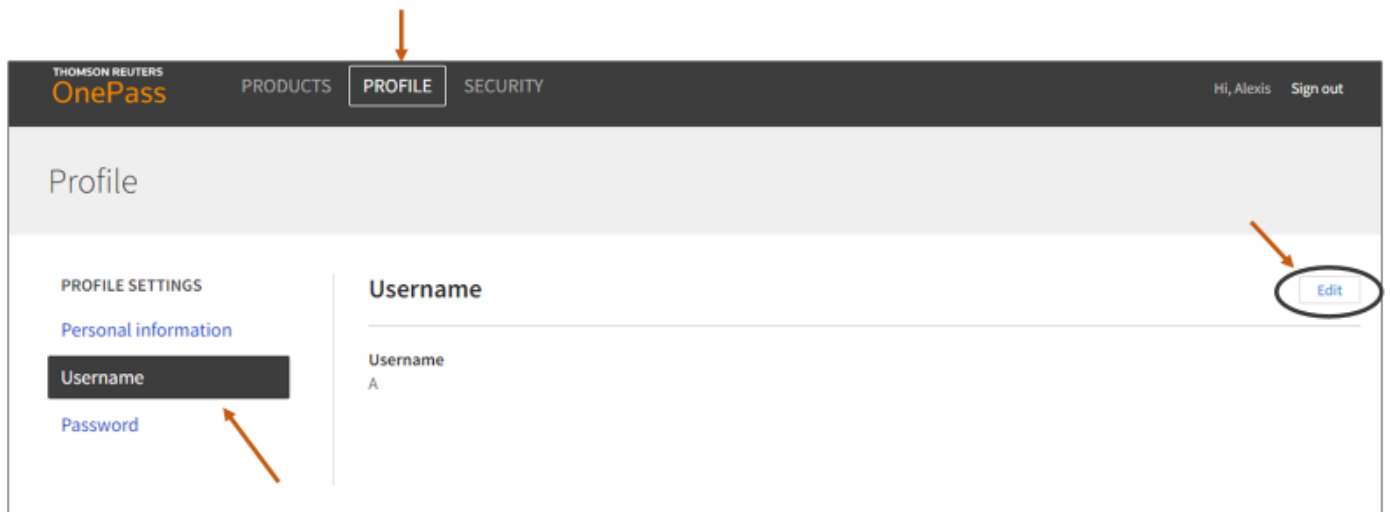
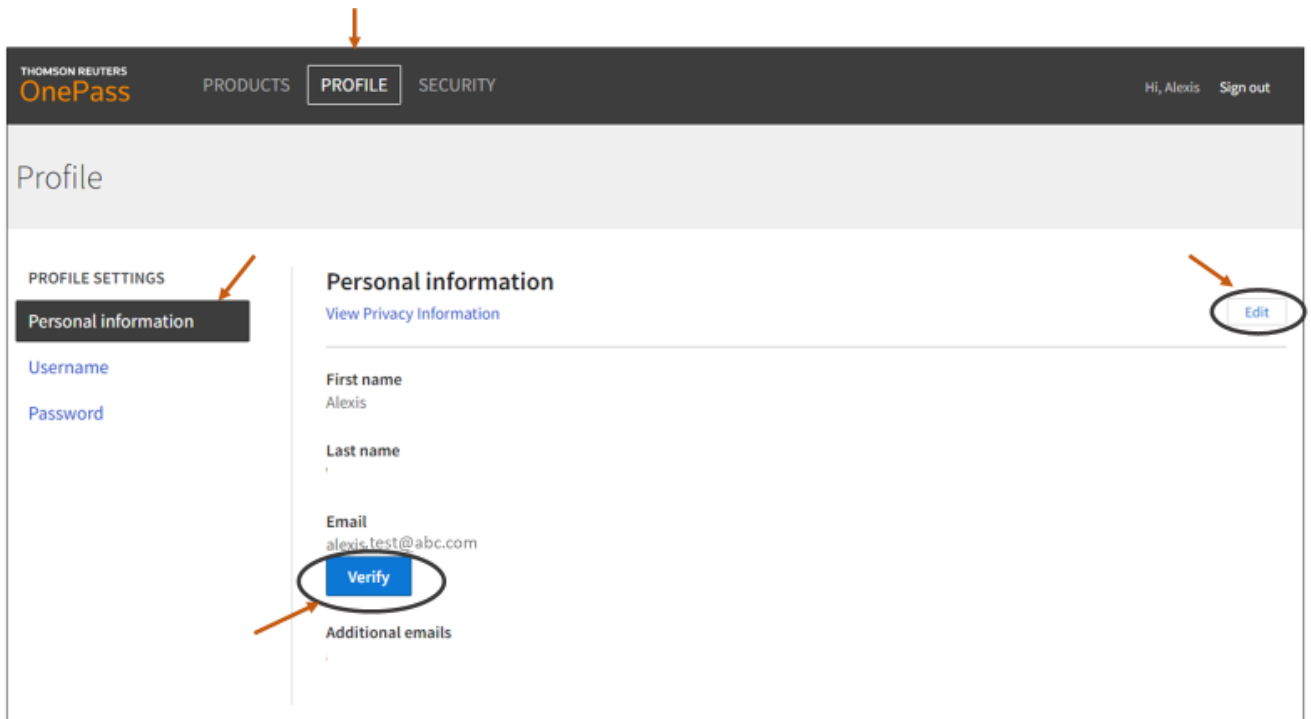


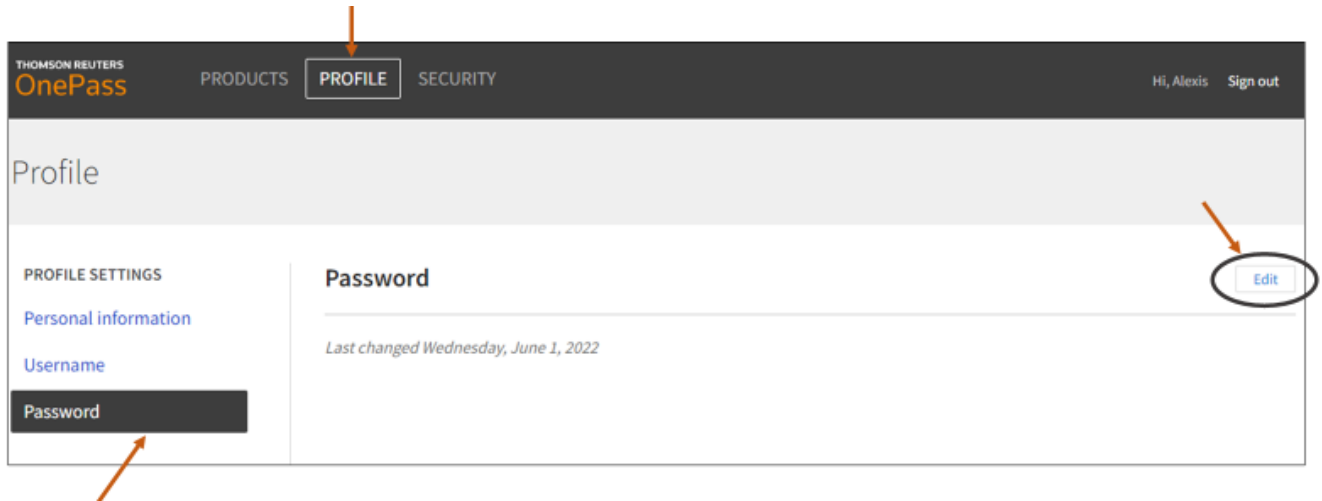
Next, follow the prompts to verify your identity.



OnePass PROFILE

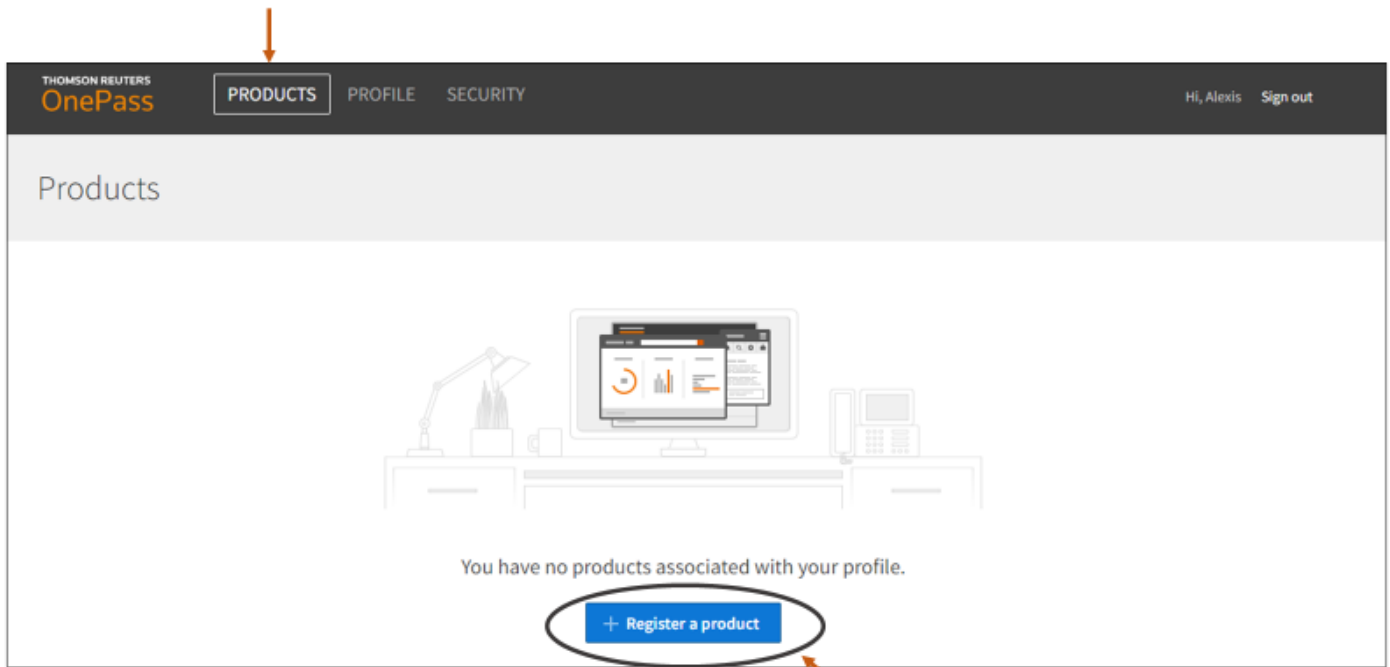
Navigate to **PROFILE** to view and edit your **Personal information, Username** or **Password** (see illustrations below).



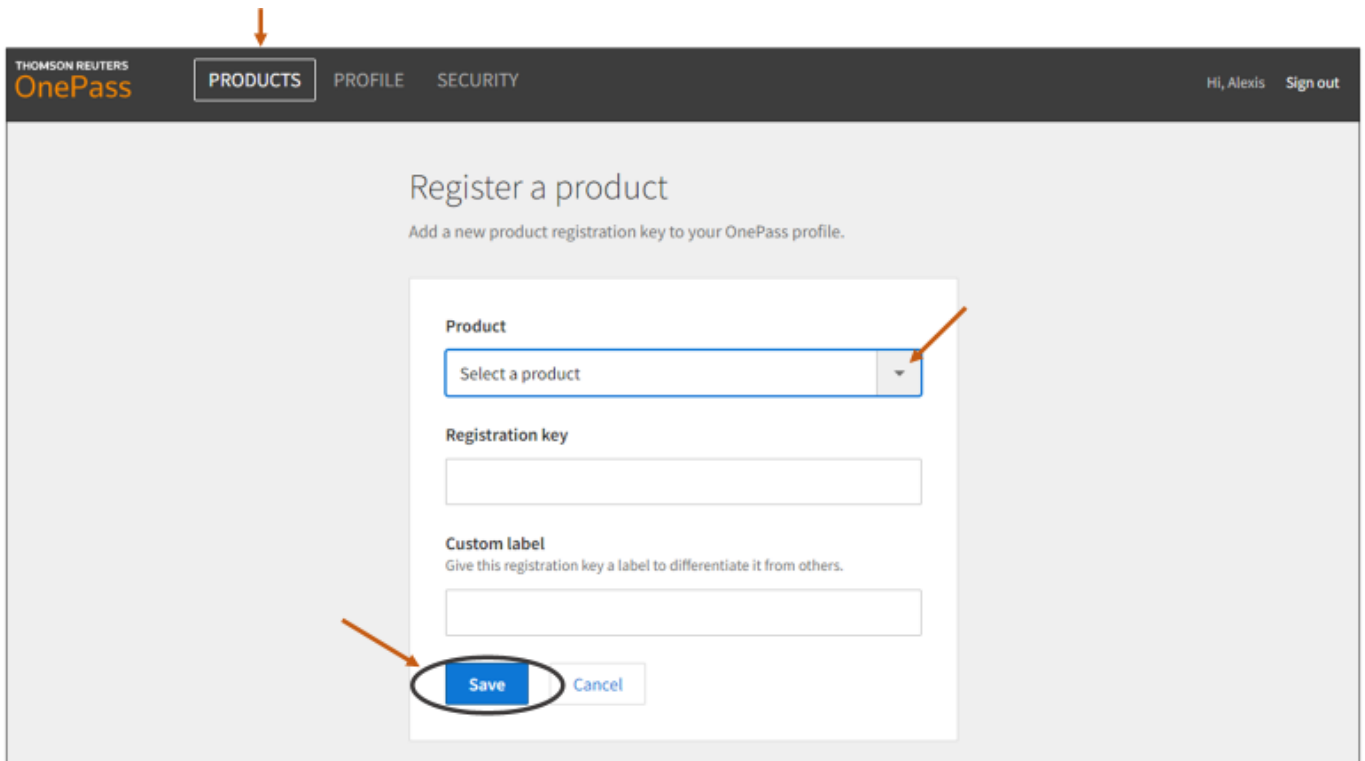


OnePass PRODUCTS

Navigate to **PRODUCTS** and click **+ Register a product**.

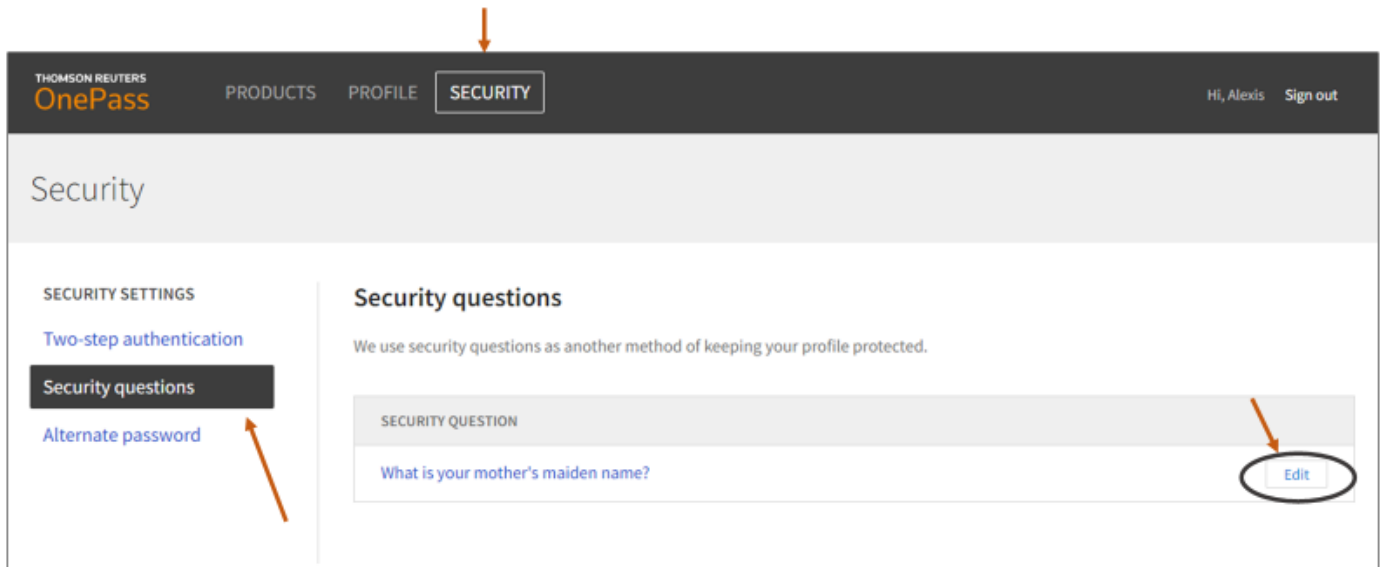
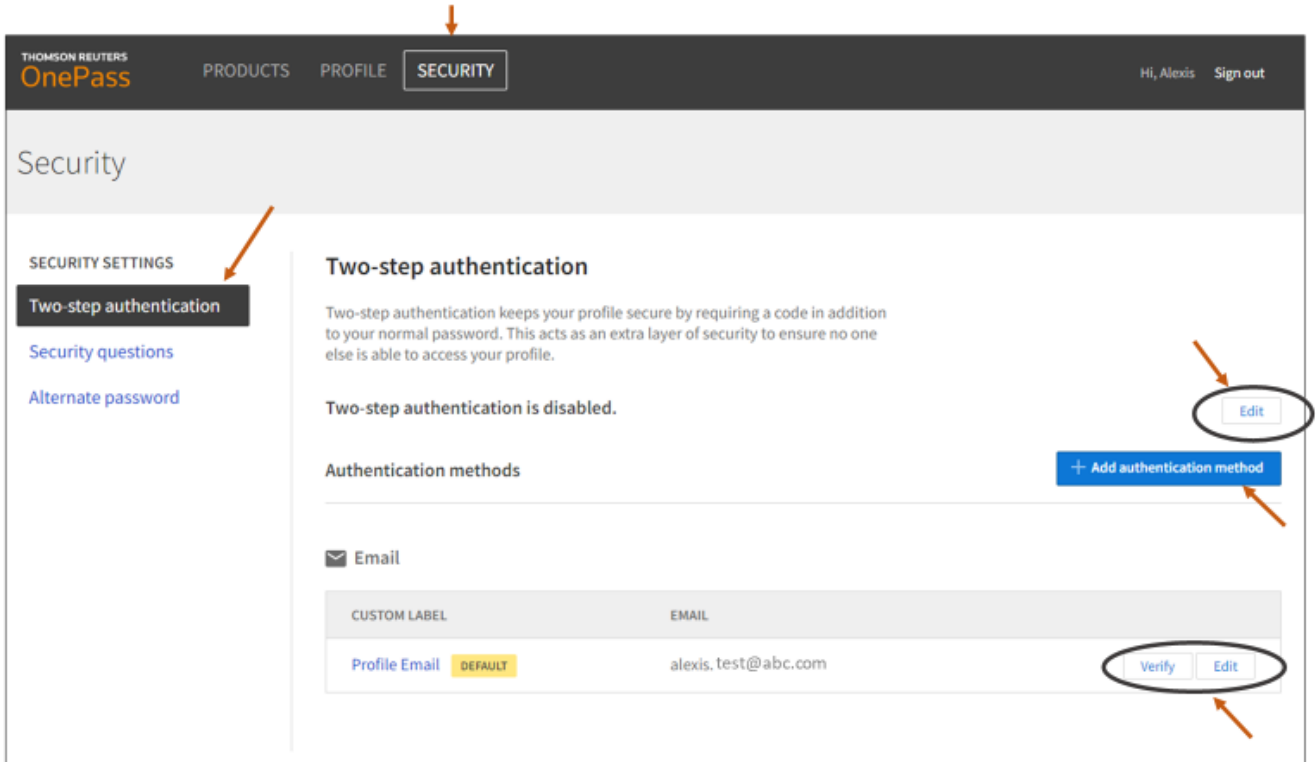


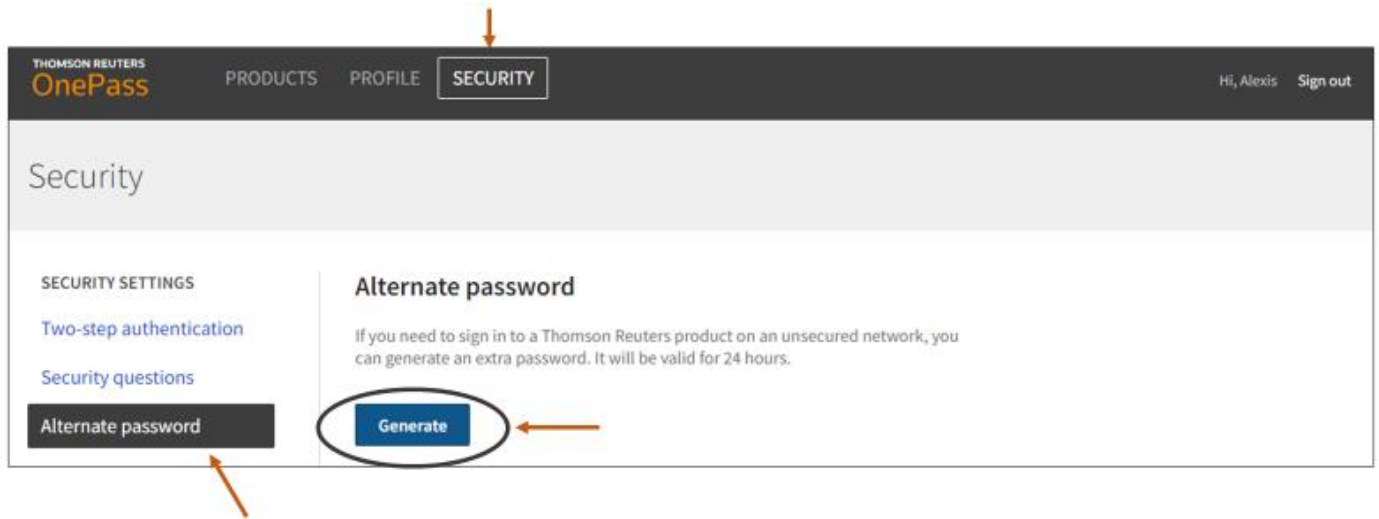
Next, click on the carrot under Product and select the **Product** you want to register. Then, provide the **Registration key** and if desired a **Custom label**. Then, click **Save**.



OnePass SECURITY

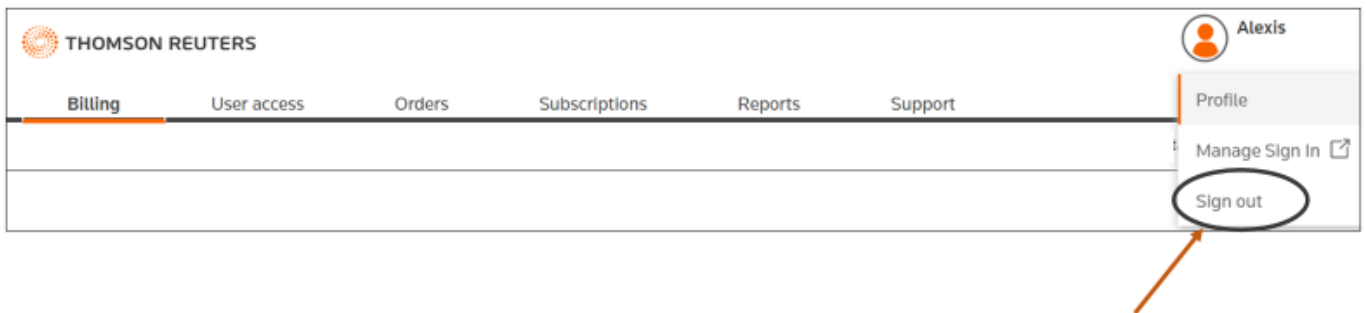
Navigate to SECURITY to change your security settings, including: 1) setting up **Two-step authentication**, 2) **Security questions**, and 3) creating an **Alternate password** (see illustrations below).





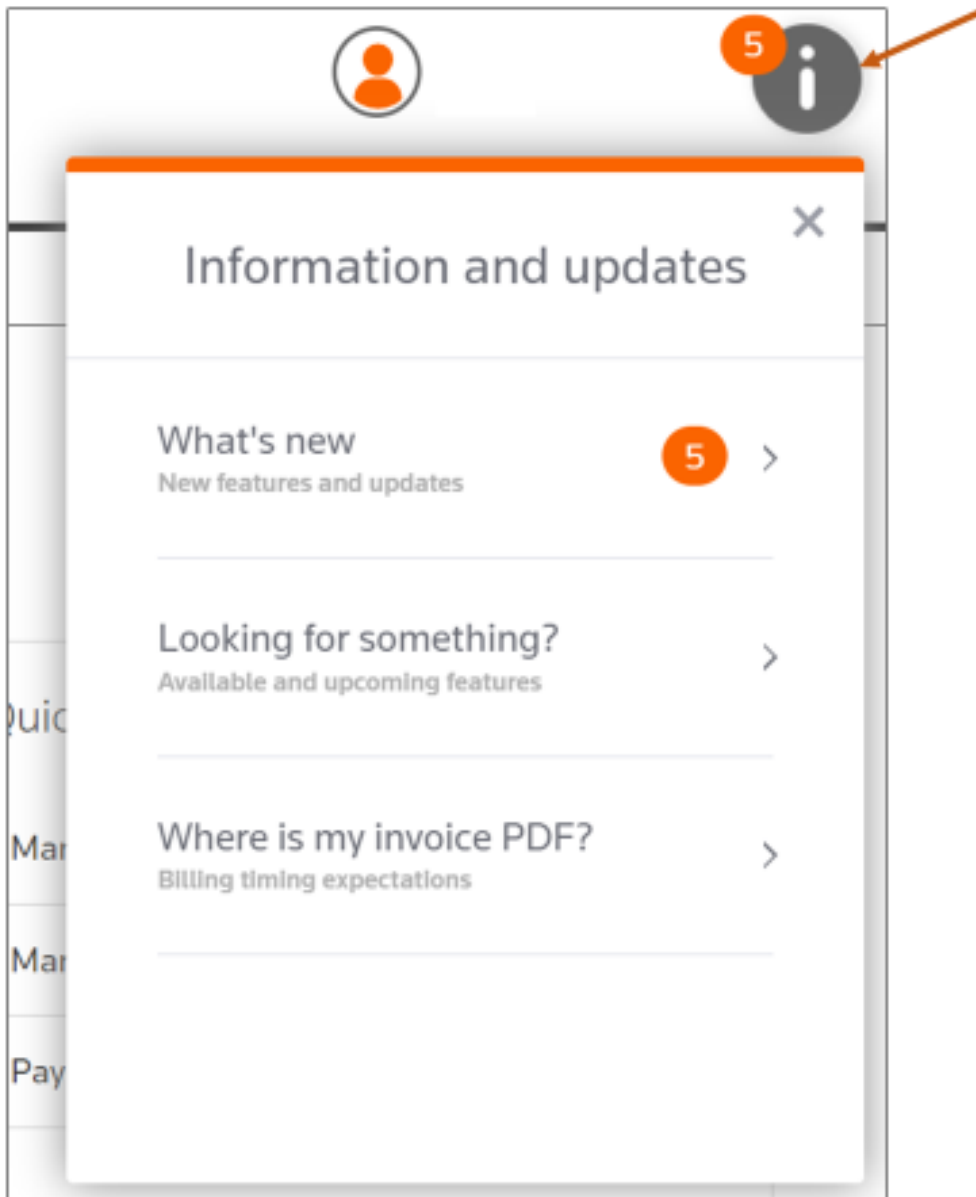
Sign-out

To sign-out of the self-service portal, click **Sign out** from the icon on the top right-hand side next to your name.



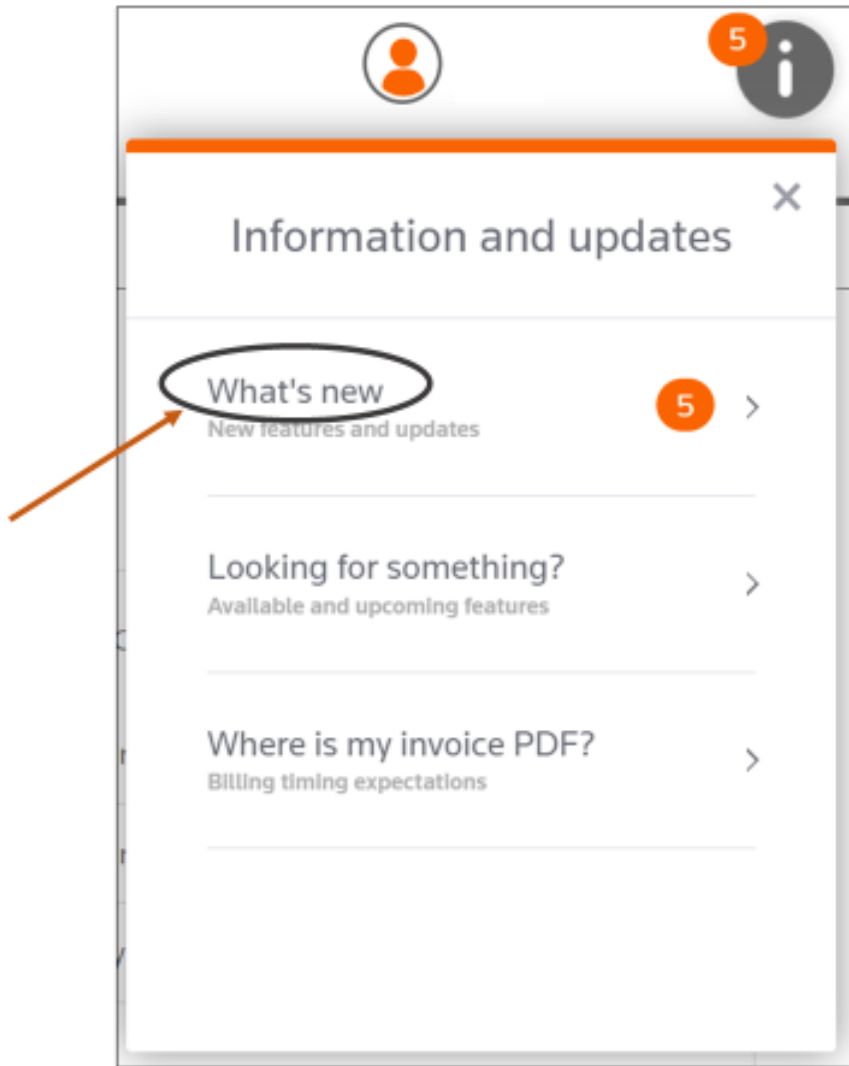
INFORMATION AND UPDATES

Click on the ⓘ on the top right side.



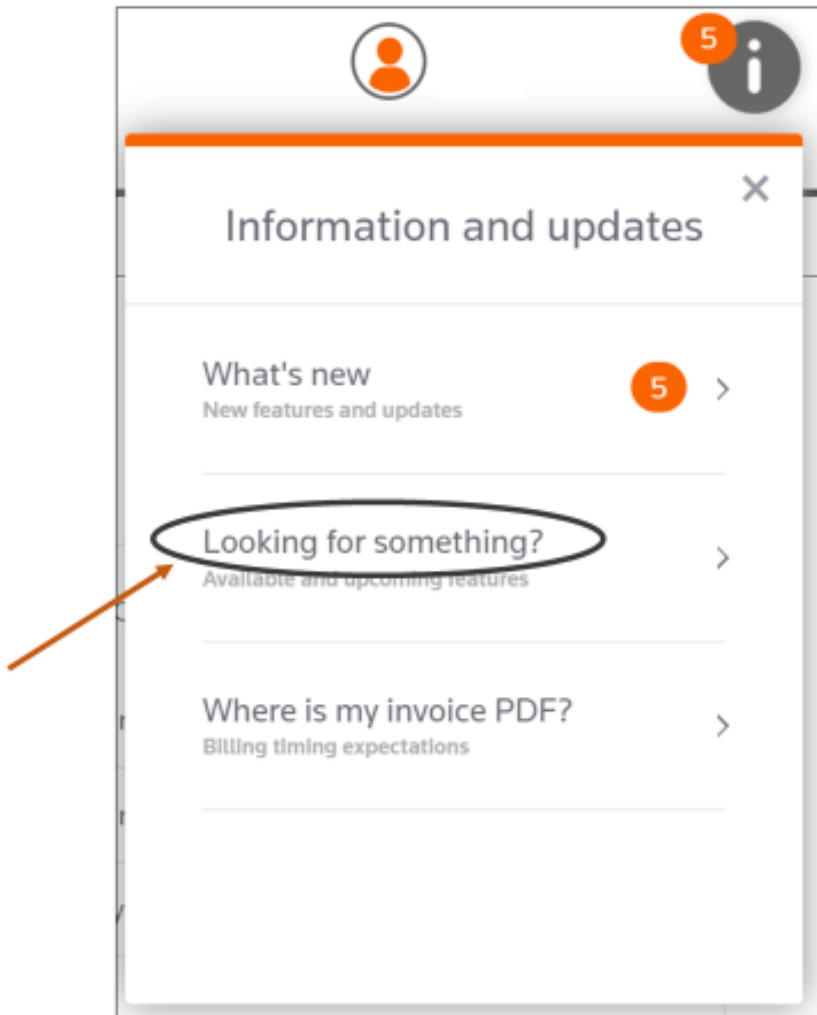
What's new

Click What's new to learn about recent updates or newly released features, including how to utilize them or tours.

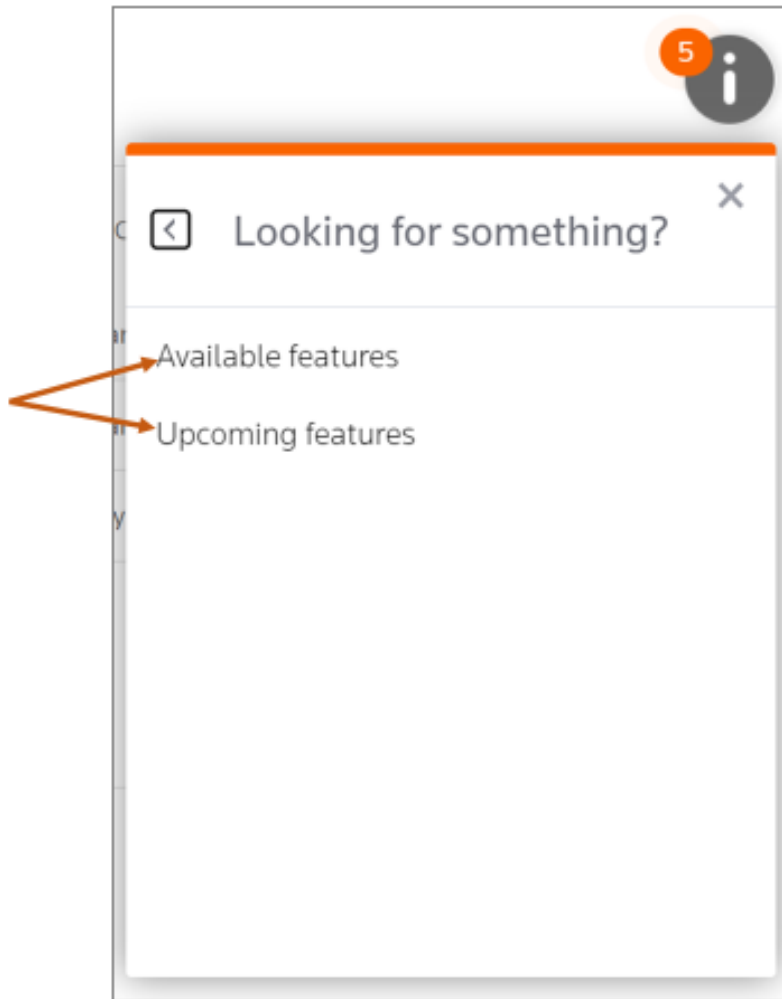


Looking for something?

To view a list of available and upcoming features, click **Looking for something?**



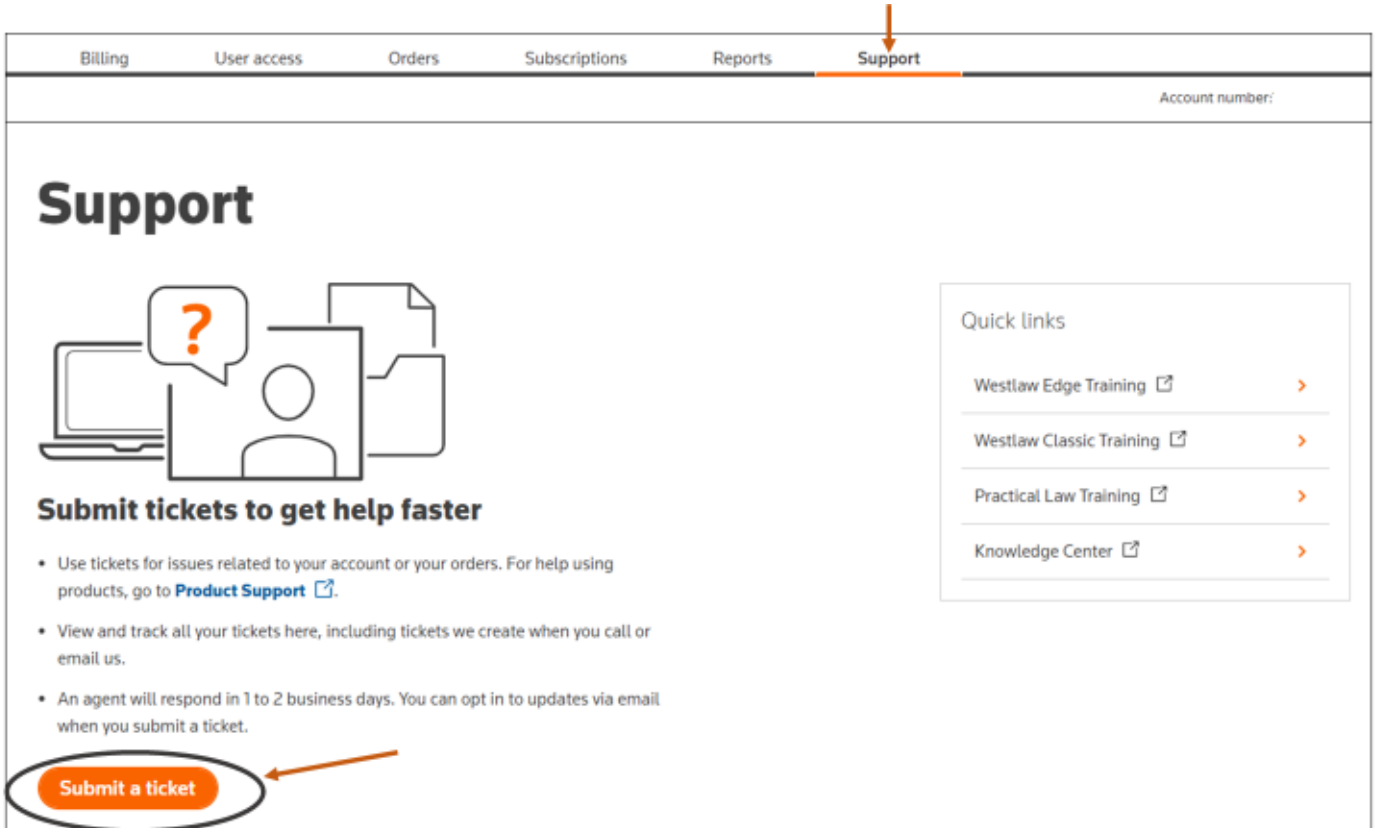
Next click either **Available features** or **Upcoming features**.



SUPPORT

Submit a Ticket

To submit a ticket, navigate to the **Support** tab and click **Submit a ticket**.



Next, under Topic, select either **Account support** or **User and admin access**. Then, click **Next**.

Billing User access Orders Subscriptions Reports **Support** Account number:

Submit a ticket

[Cancel and return to support](#)

1 What can we help you with? ^

Topic

Account support User and admin access

Next

2 Which area can we help you with? v

3 What's the main reason for submitting this ticket? v

4 Tell us a little more. v

Follow the prompts to complete the ticket request. For an example of a ticket submission flow see the illustrations below.

Submit a ticket Cancel and return to support

1 **What can we help you with?**
User and admin access

2 **Which area can we help you with?**

Category

Manage account users Manage account admins

Manage product users Account passwords

Product passwords

Next **Back**

3 **What's the main reason for submitting this ticket?**

4 **Tell us a little more.**

Submit a ticket Cancel and return to support

1 **What can we help you with?**
User and admin access

2 **Which area can we help you with?**
Manage account users

3 **What's the main reason for submitting this ticket?**

Reason

I need to add a user to my account. I need to delete a user from my account.

I need to transfer a user to another account.

Next **Back**

4 **Tell us a little more.**

Submit a ticket

[Cancel and return to support](#)

- 1 What can we help you with?**
User and admin access
- 2 Which area can we help you with?**
Manage account users
- 3 What's the main reason for submitting this ticket?**
I need to add a user to my account.
- 4 Tell us a little more.**

More details


Phone

Ticket subject

Email

Receive email notifications when an agent comments on your ticket. (Optional)

Ticket description

Attach files to your message (Optional)
Drop files to upload

Choose files
7 MB limit per upload

Submit **Back**

To receive notification when an agent responds to your ticket, click the box next to **Receive email notification when an agent comments on your ticket** before clicking Submit.

Submit a ticket Cancel and return to support

- 1** What can we help you with?
User and admin access
- 2** Which area can we help you with?
Manage account users
- 3** What's the main reason for submitting this ticket?
I need to add a user to my account.
- 4** Tell us a little more.

More details

Phone
Enter your phone number

Ticket subject
Enter a short subject line that will help you identify this ticket

Email

Receive email notifications when an agent comments on your ticket. (Optional)

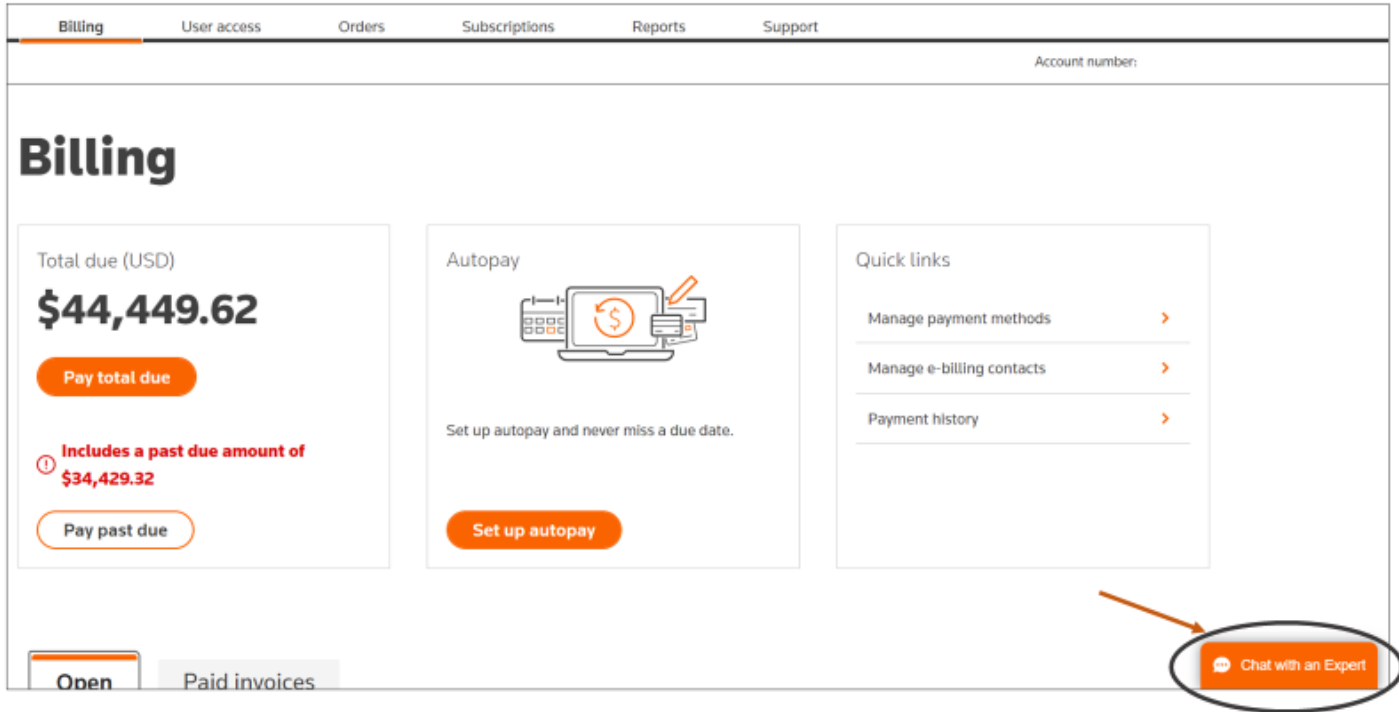
Ticket description
Share specific details so we can better assist you

Attach files to your message (Optional)
Drop files to upload
Choose files
7 MB limit per upload

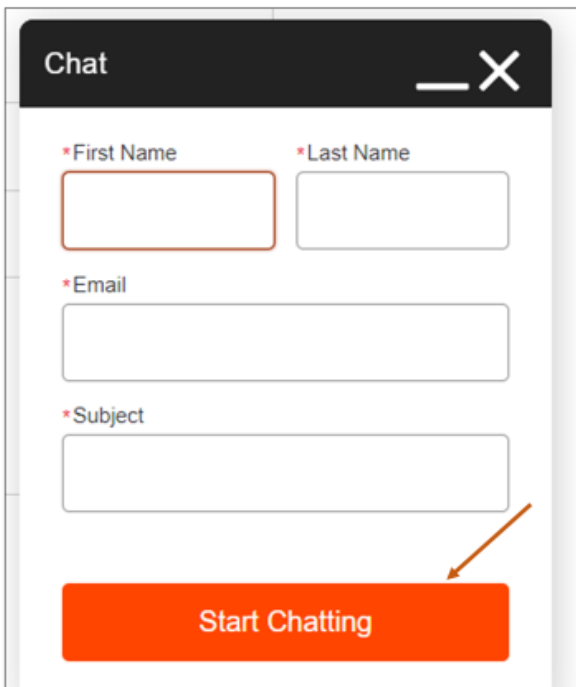
Submit Back

Live Chat

To receive immediate support, chat with a live agent. From any page, click on the **Chat with an Expert** button on the bottom right.



Next, complete the required fields in the popup **Chat** window. Then, click **Start Chatting**.



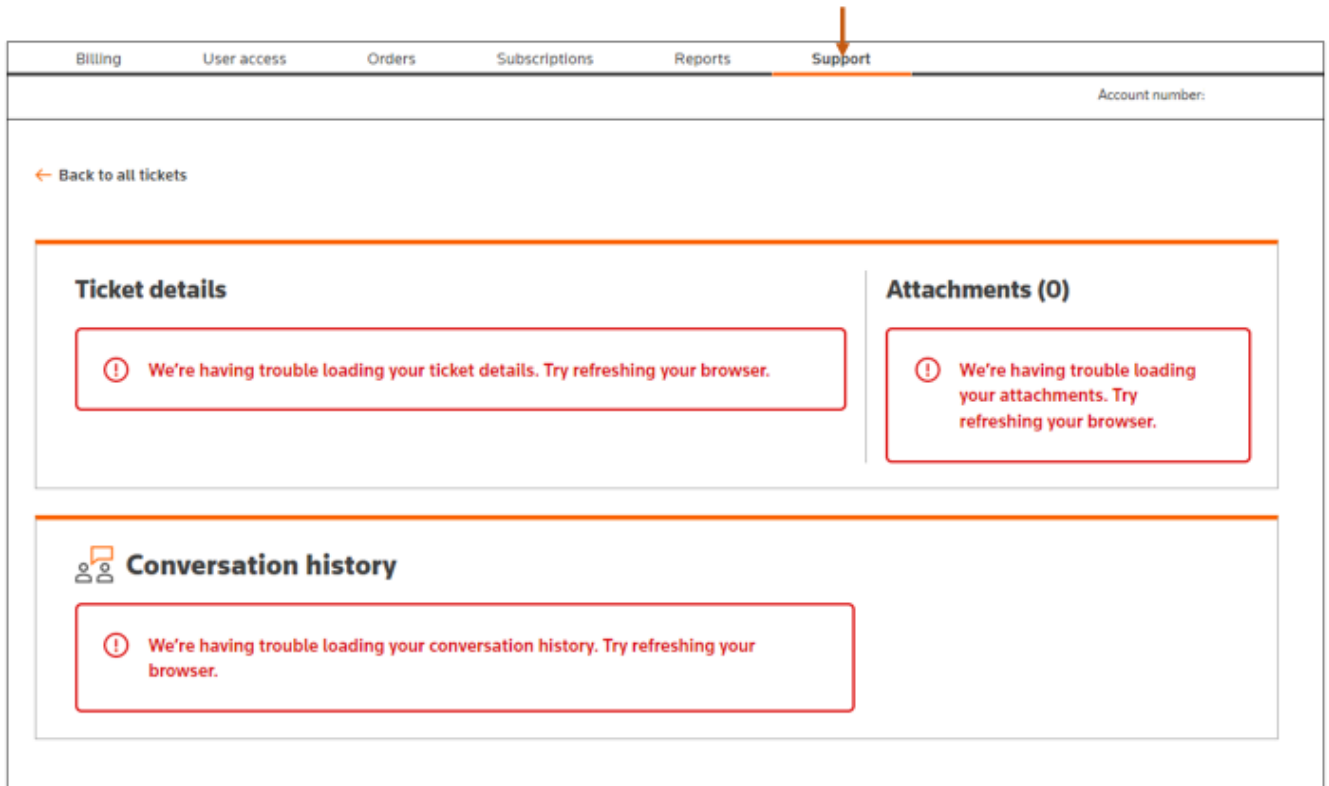
TROUBLESHOOTING & FAQs

Credit Card Error

If an error message appears when you try to add or make a payment using a credit card, click **Bank account**, then click **Credit card** again. This should resolve the issue. You can use the same procedure if you try to input credit card information and the information fails to appear.

Error Displaying Support Data

If the Support page fails to properly display ticket data, you may see one or more red boxes similar to the image below. Refresh the page. The data should properly display.



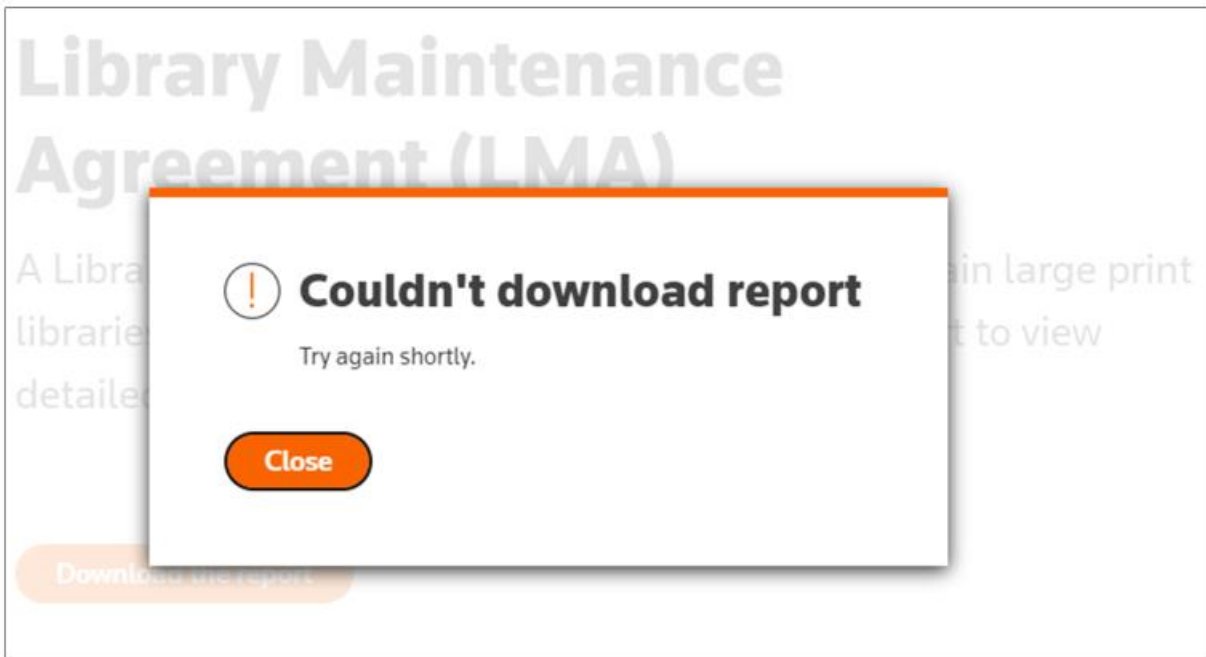
Failure to Download Invoice

If a popup window box similar to the one below appears stating that there is no PDF available for an invoice, close the box. Next, refresh or logout of the platform. Then, follow the steps to download the invoice again.



Failure to Download Library Maintenance Agreement

If a popup window box similar to the one below appears stating that the Library Maintenance Agreement could not be downloaded, close the box. You will need to try to download the report again.



Failure to Save E-billing Contact Change

If an e-billing contact change does not save properly, you will see a red box display similar to the one below. You will need to repeat the process and make the changes again.

← Back to manage e-billing contacts

! We couldn't save your changes. Please try again shortly.

Add contacts

Enter contact information

+ Contact 1:

First name	Last name	Email
<input type="text"/>	<input type="text"/>	<input type="text"/>

+ Add another contact

Add contacts [Cancel](#)

Missing Invoice

To understand timing for receiving an invoice, follow either step below.

- 1) Navigate to the **Billing** tab and click **Where is my invoice PDF**.

Billing User access Orders Subscriptions Reports Support Account number

Billing

Total due (USD)
\$34,735.91

[Pay total due](#)

Includes a past due amount of \$34,735.91

[Pay past due](#)

Autopay

Set up autopay and never miss a due date.

[Set up autopay](#)

Quick links

- [Manage payment methods](#)
- [Manage e-billing contacts](#)
- [Payment history](#)

Open Paid invoices

Invoices and credits [Where is my Invoice PDF?](#) [Export open invoice list to file](#)

Invoice	Title	Invoice date	Due by	Status	Amount (USD)	Actions
<input type="checkbox"/> 0845728929	Subscription	Jan 01, 2022	Jan 11, 2022	Payment pending	\$154.28	Actions
<input type="checkbox"/> 1202525123	Credit	Oct 12, 2020	-	Open	-\$89.71	Actions
<input type="checkbox"/> 1202415671	Credit	Oct 14, 2020	-	Open	-\$89.71	Actions

Then, view the **Did you know** popup window.

✕

Did you know?

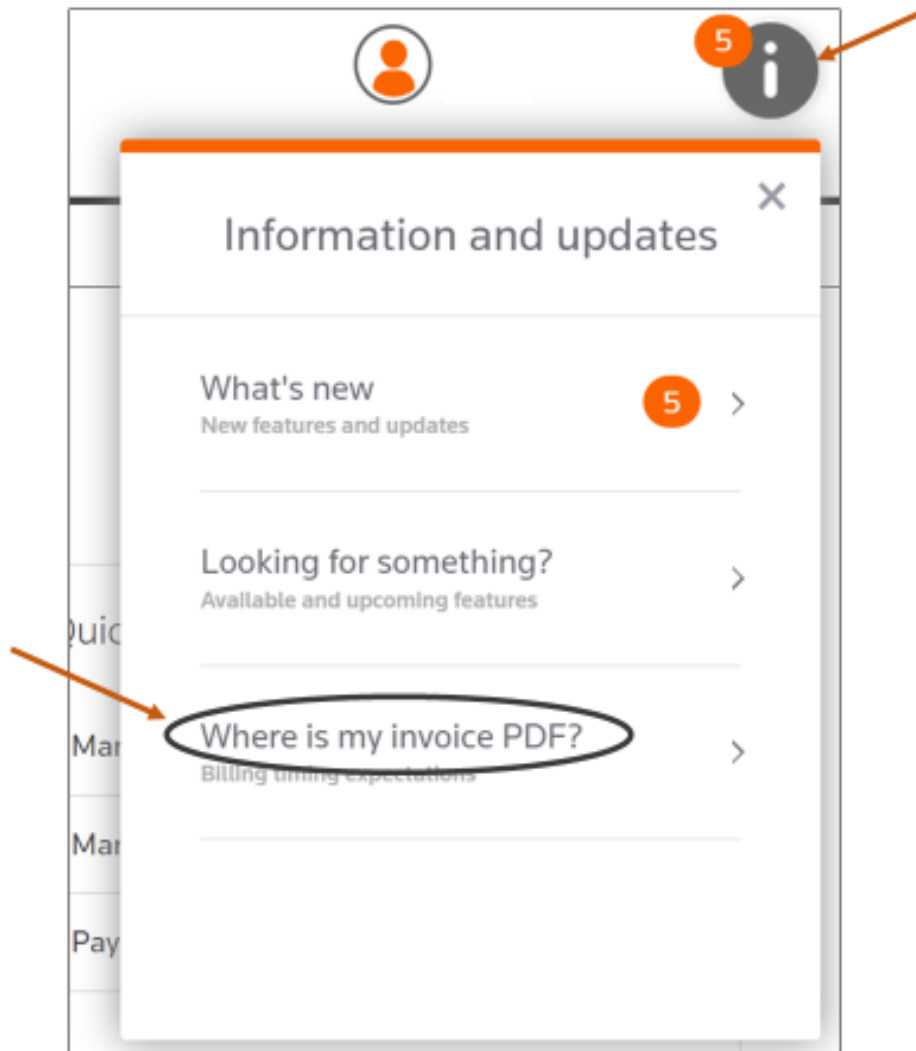
Online invoices (West information charges) are generated at the beginning of each month. Individual charges are visible on our self-service portal by the fourth day of each month and invoice PDFs are available for download by the seventh to eighth day of each month. Invoices are mailed shortly thereafter to customers who choose to receive paper copies.

Day(s) of the month	Online invoice billing timeframe expectations
4th	Individual charges are visible, but invoice PDF is not yet available
4 th – 5 th	e-billing emails are sent with invoice PDF attached to the email
7 th – 8 th	Invoice PDF is available for download from the self-service portal

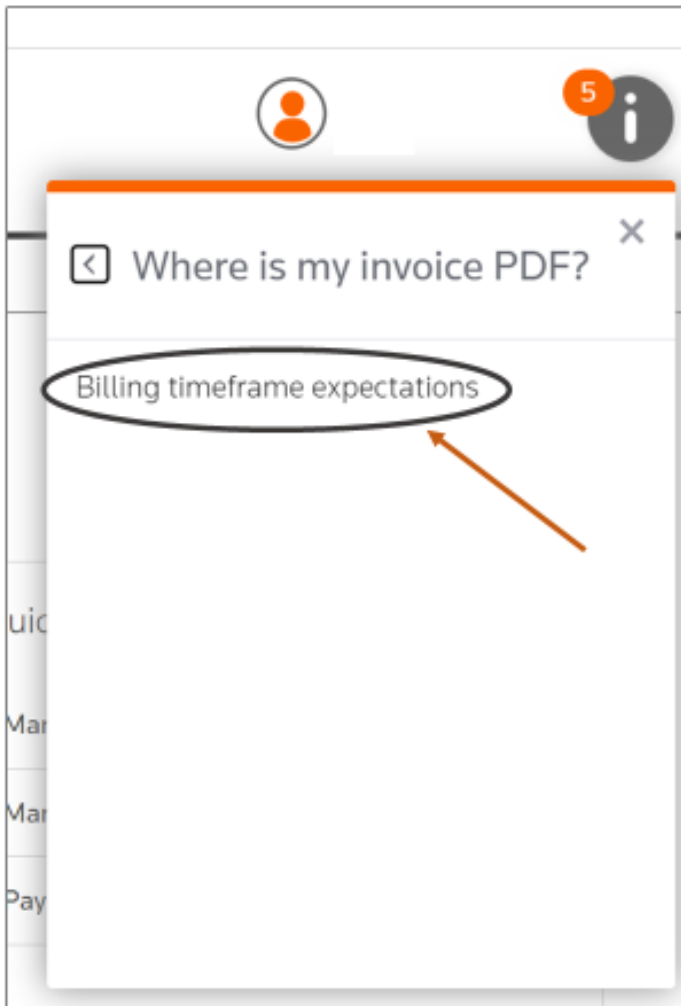
For more details, review [this article](#) in our Support Center.

Close

2) Click the ⓘ on the top right side and select **Where is my invoice PDF?**.



Next, click **Billing timeframe expectations**.



Then, view the **Did you know** popup window (displayed in above).

OnePass Log-in Issue


When creating a OnePass account, please ensure you use the email address provided to set-up your account. If you have multiple email addresses (or a shortened version of an email address), you need to use the exact address used to set-up the account. If you already have a OnePass account, you may need to create a new OnePass account to use the self-service portal.

Suspended Account / Reactivate Account


A user who logs into an account suspended for nonpayment will see a box similar to the image below. Call the phone number listed or send an email to the provided email address to reactivate the account.

Your account is suspended for non-payment

To reactivate your account, contact our support team to work out a payment plan for the outstanding balance.



Call 1-800-522-0552
Available Monday to Friday from 7 AM to 5 PM CT.



Email west.arcollection.inquiries@thomson.com
We'll get back to you within 2 business days.

Unable to Chat with Live Agent

At certain times, including non-business hours, live agent support is unavailable. This is indicated at the bottom right of the screen as either **Chat offline** (as in the first image below) or **Agent Offline** (as in the second image below).

