

All-in-one Guide for Improved Invoices and Notification Emails

Table of Contents

In a complex world, we are constantly looking for opportunities to make it easier for you to do business with us. Starting in 2020, you will see an enhanced version of invoicing for New Sale Invoices, Subscription Invoices, the Monthly Account Summary, and Credit Notes as well as the notification emails for e-Invoicing and Credit Notes.

e-Invoicing Format Changes.....	Page 2
New Sale Invoice.....	Page 3
Subscription Invoice.....	Pages 4-7
Subscription Invoice - Summary.....	Page 4
Subscription Invoice - Detail - Library Plan Charges and Subscription Product Charges.....	Page 5
Subscription Invoice - Detail - Findlaw Charges.....	Page 6
Subscription Invoice - Account Totals by Location.....	Page 7
Monthly Account Summary.....	Page 8
Credit Notification Format Changes.....	Page 9
Credit Note.....	Page 10

Existing e-Invoicing Email

Customers currently signed up for e-Invoicing will continue to receive the existing email format for the following document types: Online Invoice, Online Debit, and Client Level.

Existing Functionality

- View Invoice button requires log in to view an invoice

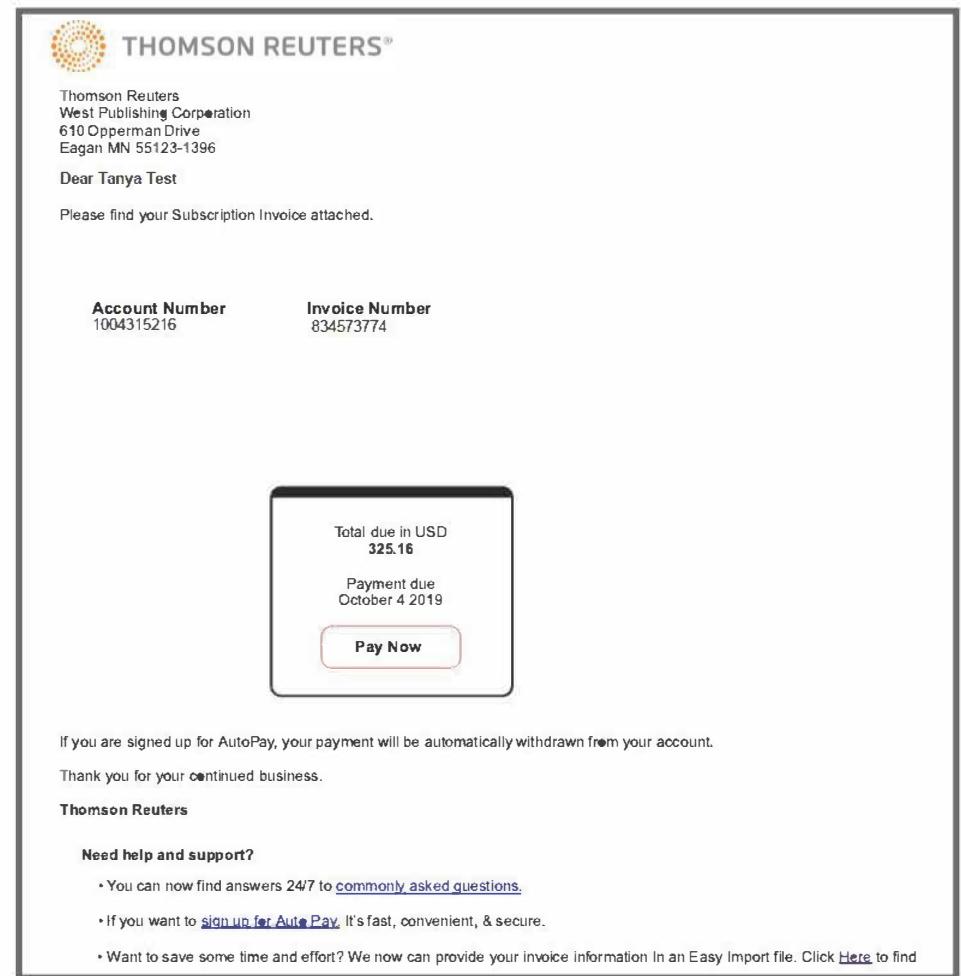
My Account'. It also includes a link to 'Customer Service Support' and a note about Auto-Pay. The footer says 'Please do not reply directly to this email message.' and 'If Auto-Pay appears the amount will be charged to your bank account or credit card on or after the invoice date.' Thank you for your business." data-bbox="62 269 419 925"/>

New e-Invoicing Email

Customers currently signed up for e-Invoicing will receive the new e-Invoicing email format for their Subscription Invoice, Credit Note, New Sale Invoice, and Print Debit document types.

Enhancements

- Invoice PDF is attached to email, no logging in required
- New simplified format
- Hyperlinks throughout the document:
 - Pay now - linked to My Account
 - Commonly Asked Questions - linked to Customer Support Site
 - Sign up for Auto Pay - linked to Auto Pay sign up or updates
 - Privacy Policy - linked to the policy





Go Green by [signing up for e-Invoicing](#). It's easy, convenient, and secure to get your invoice by email delivery. Sign up today and enjoy all the benefits of paperless billing.

- **Easy for you** – just open an email instead of an envelope
- **Good for the environment** – less paper means less waste
- **Secure for your office** – invoice pdf is emailed to a designated party or parties

1 New Sale Invoices cover any one-time purchase.

2 High-level invoice information, including the invoice number, billing account number, invoice date, purchase order number if applicable, and the ship to address.

3 Total due and Payment due information will be listed if payment was not provided with the order. If your billing account has recurring payments set up you will see 'AUTO-PAY' in place of the Total due and Payment due information.

4 Your tax rate is unique to your location, product, and account.
Related Article: [How do I add my tax-exempt status to my account?](#)

5 Details about the products ordered, including the material number, quantity, unit price, charge price, tax, and total by line item.

6 Details about your order, including order number, order date, shipment date, and delivery number. Delivery numbers are visible on the outside of the shipment as well as on the shipping notice found inside the box for ease in matching a New Sale Invoice to a delivery.

7 Go Green by paying electronically on [MyAccount](#). When paying your invoice via check, remit payment to our payment address.
Related Articles: [How do I manage my account online?](#) [What methods can I use to make a payment?](#)

8 If you still have questions on your invoice, please have your billing account number available when contacting us to ensure you are routed in the most efficient way.

Call us Monday through Friday
7:00 a.m. - 7:00 p.m. CST

1-800-328-4880

Note: All prices and account details on this invoice have been modified and are for example purposes only.

1 New Sale Invoice



Thomson Reuters
West Publishing Corporation
610 Opperman Drive
Eagan, MN 55123-1396

Page 1 of 1

TANYA TESTING ACCOUNT

Invoice #: 6132909939
Account #: 1004315216
Invoice date: 04/01/2020
Purchase order #: ABC123

Ship to
TANYA TESTING ACCOUNT
FIRM CENTRAL **TESTING ONLY**
610 OPPERMAN DR
EAGAN, MN 55123-1340

Total Due
706.46
Payment due
April 30, 2020

5 Product Detail	Material #	Quantity	Unit price USD	Charge price USD	4 Tax USD	Total USD
MCGOVERN AND HIRSCH CA PROBATE CODE ANNO 2020	42630920	2	123.00	246.00	17.53	263.53
COURTROOM HANDBOOK ON FEDERAL EVIDENCE 2019 HANDBOOK	42168162	1	378.00	378.00	26.93	404.93
CODE OF LAWS OF SC 1976 ANNO V.20 EDUCATION	42496991	1	35.47	35.47	2.53	38.00
Total						706.46

Billing note



6 Order Information
Order #: 66921484
Order date: 04/01/2020
Shipment date: 04/01/2020
Delivery #:



Proof

8

TANYA TESTING ACCOUNT
Invoice #: 6132909939
Invoice date: 04/01/2020
Account #: 1004315216
Federal Tax ID: 41-1426973
VAT reg #: EU826006554

Invoice due date: 4/30/2020
Amount due: 706.46

Please make checks payable to

Amount enclosed _____

Thomson Reuters - West
Payment Center
P.O. Box 6292
Carol Stream, IL 60197-6292

6132909939 00000000000000000000000000000000 20200401 ZPD 000070646 0010 1004315216 0



Go Green by [signing up for e-Invoicing](#). It's easy, convenient, and secure to get your invoice by email delivery. Sign up today and enjoy all the benefits of paperless billing.

- **Easy for you** – open an email instead of an envelope
- **Good for the environment** – less paper means less waste
- **Secure for your office** – invoice pdf is emailed to a designated party or parties

- 1 The Subscription invoice covers non-online services such as print, Preview, and Findlaw.
- 2 High-level invoice information, including the invoice number, billing account number, and invoice date.
- 3 Identify your Total Due and Payment Due information at a glance. If you have set up recurring monthly payments you will see 'AUTO-PAY' in place of the Total Due and Payment Due information. Do not remit separate payment, your automatic payment is already scheduled.
Related Articles: [How do I set up automatic payments from my credit card?](#) & [How do I set up automatic payments from my checking account?](#)
- 4 Your tax rate is unique to your location, product, and account.
Related Article: [How do I add my tax-exempt status to my account?](#)
- 5 The first invoice page features a rolled-up summary of your invoice broken out into three key types of charges. The Summary sections that appear will vary based on your account's products and services.
- 6 If you have prepaid for your services, prepayment information will be listed beneath the Summary. The Total Due will be adjusted and the running remaining prepayment balance will be listed.
This invoice has a prepayment of \$698.40 applied that reduced the Total Due to \$1,618.54.
Related Article: [How do I set up a prepayment?](#)
- 7 The Billing note and Self Service online resources sections will contain information of importance for your invoice and resources that will help save you time. Check it monthly for current messages.
- 8 If you have automatic payments set up, you will see 'AUTO-PAY' in the Payment Due field. Your expected payment withdrawal date will be visible in place of this generic message. Your invoice will display 'Total Invoice Amount will be withdrawn on or after XX/XX/XXXX'.
- 9 Go Green by paying electronically on [MyAccount](#) with a one-time or recurring payment. When paying your invoice via check, remit payment to our payment address.
Related Articles: [How do I manage my account online?](#) [What methods can I use to make a payment?](#)

1 Subscription invoice



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610 Opperman Drive
Eagan MN 55123-1396

Page 1 of 4

TANYA TESTING ACCOUNT

Invoice #: 0834573774
Account #: 1004315216
Invoice date: 02/04/2019

Total Due in USD
1,618.54

Payment Due
March 6 2019

TANYA TESTING ACCOUNT
610 OPPERMAN DR
EAGAN, MN 55123-1340

Summary	Charge USD	4 Tax total USD	Total USD
LIBRARY PLAN CHARGES	20.91	1.75	22.66
SUBSCRIPTION PRODUCT CHARGES	349.00	29.23	378.23
FINDLAW CHARGES	1,842.85	73.20	1,916.05
TOTAL INVOICE AMOUNT	2,212.76	104.18	2,316.94
Less prepayment applied to this invoice			-698.40
Total Due in USD			1,618.54
* Remaining prepayment balance to be applied to future invoices 6,054.50 USD			

Billing note:

NEW RESOURCE AVAILABLE: Find information on how to read your invoice and other commonly asked billing questions under the Billing, payment, returns & refunds section online at [legal.thomsonreuters.com/en/support](#).

Self Service online resources

Sign up for E-delivery of invoices at [http://ebilling.thomsonreuters.com](#)
To manage your account, sign up at [MyAccount](#) [http://myaccount.tr.com/westlaw](#)
For online support, contact us at [http://legal.thomsonreuters.com/en/support](#)

7

8 *Include this portion with your payment-Folding and stapling may delay your payment*

TANYA TESTING ACCOUNT
Invoice #: 0834573774
Invoice date: 02/04/2019
Account #: 1004315216
Federal Tax ID: 41-1426973
VAT reg #:EU826006554

Invoice due date: March 6 2019
Amount due in USD: 1,618.54

Amount enclosed _____

Pay online:

Log on to [http://myaccount.tr.com/westlaw](#) to make the payment electronically. Set up your payment to be withdrawn electronically using direct debit or credit card.

Please make checks payable to:

Thomson Reuters - West
Payment Center
P.O. Box 6292
Carol Stream, IL 60197-6292

0834573774 00000000000000000000000000000000 20190204 ZCMI 000626789 0010 1000263553 8

10

Starting on page two of your invoice, you will see a breakdown of individual charges grouped by charge type that correlate to the Summary section totals appearing on page one. The Library Plan Charges section includes Library Maintenance Agreement and West Complete Library charges.

11

For materials that are shipped, the account number, name, and address will appear above the charge. The shipping account may differ from the billing account.

12

Products with billing plans will display the date range of the service period. When you first begin a new monthly billing plan you may experience pro-rated billing. When you first begin a new monthly billing plan your first invoice will have the pro-rated charges for your first service month as well as the full monthly charge for the current month. View the service period date ranges to identify the service dates your invoice covers.

This example does not have pro-rated billing.

13

Each billing line item is assigned an invoice Reference number that begins with a '6'. Reference this number when paying for a particular line item or when inquiring about a specific charge with Customer Service.

14

Customers who have bundled print deals will see a breakdown of charges as different products are taxed at different rates. Categories include:

- Books & Bound Volumes
- Newsletters
- Periodicals
- Digital Goods
- Tangible Personal Prop

Related Article: [What is Tangible Personal Property?](#)

15

Each section of individual charge detail will have a Charges Total that correlates to the Summary section totals appearing on page one.

16

The Subscription Product Charges section includes charges for print subscriptions, Assured Print Pricing, and annual/monthly charges not included in a bundled print deal.

17

The Ship/Post date references the date the update shipped for physical shipments or the date the charges posted to the account for other product charges. Any physical material that shipped will have a correlating Delivery number.

18

Any products that shipped under the same Delivery number will appear below the Delivery number.

If you have a Purchase Order number set up for your purchase, it will appear just below the shipment description.

Related Article: [How do I include a purchase order number on our account?](#)

TANYA TESTING ACCOUNT

Invoice #: 0834573774
Account #: 1004315216
Invoice date: 02/04/2019



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Proof

10 Library Plan Charges

Product Detail	Reference #	Quantity	Unit Price USD	Charge Price USD	Tax USD	Total USD
1004315216						
TANYA TESTING ACCOUNT						
610 OPPERMAN DR						
EAGAN, MN 55123-1340						
Ship/Post date:February 1						
February 1 2019 - February 28 2019						
12						
WEST COMPLETE LIBRARY SUB						
(Unique identifier 0000723021)						
13	6113778523					
BOOKS & BOUND VOLUMES						
14						
15						
Library Plan Charges Total USD						
						22.66

16 Subscription Product Charges

Product Detail	Reference #	Quantity	Unit Price USD	Charge Price USD	Tax USD	Total USD
1004930625						
TOM R WEST LLC						
810 WINTER ST						
EAGAN, MN 55123-1340						
Ship/Post date:January 23						
Delivery # 0432995213						
17						
NY ESTATES: PROBATE						
ADMINISTRATION AND LITIGATION						
6TH V1 2019						
18	6113778524	1	349.00	349.00	29.23	378.23
PO #: XXX						
19						
Subscription Product Charges Total USD						
						378.23

Continued on next page

19

The Findlaw Charges section will include charges for Findlaw and Super Lawyers.

20

Findlaw websites are billed in arrears, after the month of service. Findlaw websites include FirmSite Website Packages and FS Integrated Marketing Suites.

In this example, the service period of the referenced website was January and they were billed on the February invoice.

21

The unique identifier is a way to easily identify a product or bundle of products that were purchased together. When you have similar products it can be helpful to reference the unique identifier when inquiring with Customer Service.

22

Findlaw Directory Topspots and Findlaw Super Lawyer profiles are billed in the same month the service is provided.

In this example, the service period of the referenced profiles was February and they were billed on the February invoice.

23

Some Findlaw products, such as Directory Topspots, will display the location / practice area information.



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TANYA TESTING ACCOUNT

Invoice #: 0834573774
Account #: 1004315216
Invoice date: 02/04/2019

Proof

19 Findlaw Charges

Product Detail	Reference #	Quantity	Unit Price USD	Charge Price USD	Tax USD	Total USD
1004315216 TANYA TESTING ACCOUNT 610 OPPERMAN DR EAGAN, MN 55123-1340 Ship/Post date:January 31 January 1 2019 - January 31 2019						
20 FINDLAW FIRMSITE 444C WEB SITE PACKAGE (Unique identifier 0000723478)	6113778525	1	874.08	874.08	73.20	947.28
21 Ship/Post date:January 31 January 1 2019 - January 31 2019						
FINDLAW SOCIAL PROMOTION SERVICE FINDLAW VIDEO SOCIAL PRO	6113778526	1	698.40	698.40	0.00	698.40
22 Ship/Post date:February 1 February 1 2019 - February 28 2019						
FINDLAW DIRECTORY REFINED TOPSPOT PUTNAM, NEW YORK/CRIMINAL LAW	6113778528	1	30.37	30.37	0.00	30.37
23 Ship/Post date:February 1 February 1 2019 - February 28 2019						
FINDLAW PREMIUM PROFILE	6113778532	1	51.35	51.35	0.00	51.35
FINDLAW DIRECTORY TOPSPOT SUB DUTCHES COUNTY, NY/PERSONAL INJURY -- PLAINTIFF	6113778533	1	188.65	188.65	0.00	188.65

Findlaw Charges Total USD
1,916.05

24

Following the detailed breakdown of the three key charge types there will be a summary of Account totals by location. This page will only appear if products were shipped to more than one location. This overview of charges by account location includes all charge types, making it easy to manage invoices when your office has multiple locations.

25

If you still have questions on your invoice, please have your billing account number available when contacting us to ensure you are routed in the most efficient way.

Call us Monday through Friday
7:00 a.m. - 7:00 p.m. CST

1-800-328-4880

Note: All prices and account details on this invoice have been modified and are for example purposes only.



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TANYA TESTING ACCOUNT

Invoice #: 0834573774
Account #: 1004315216
Invoice date: 02/04/2019

25

Proof

Account totals by location

Location	Account#	Charge Price USD	Tax USD	Total USD
TANYA TESTING ACCOUNT 610 OPPERMAN DR EAGAN, MN 55123-1340	1004315216	1,863.76	74.95	1,938.71
TOM R WEST LLC 810 WINTER ST EAGAN, MN 55123-1340	1004930625	349.00	29.23	378.23



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- **Good for the environment** – less paper means less waste
- **Secure for your office** – invoice pdf is emailed to a designated party or parties

1

For customers who have signed up for monthly account summaries, they will see the following Monthly Account Summary page along with their normal monthly Subscription Invoice. The Monthly Account Summary is a comprehensive report of all account activity for the current subscription billing period.

To sign up to receive a Monthly Account Summary, call Customer Service at 1-800-328-4880.

2

Billing Account number that the monthly account summary is covering.

3

The sections of the Monthly Account Summary will be broken up into Cleared Charges, Open Balance, and Open Prepayment. In this Cleared Charges section you will see a summary of all the cleared charges for the billing account number noted. The timeframe of the summary will cover the 30 days prior to the invoice date.

4

The Open Balance section will cover all currently open charges or credits as of the invoice date.

5

The Open Prepayment section will list any and all active prepayments currently set up on your billing account. The Amount will display the remaining prepayment balance as of the invoice date.

2

If you still have questions on your Monthly Account Summary, please have your billing account number available when contacting us to ensure you are routed in the most efficient way.

Call us Monday through Friday
7:00 a.m. - 7:00 p.m. CST

1-800-328-4880

Note: All prices and account details on this Monthly Account Summary have been modified and are for example purposes only.

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Page 25 of 25
TANYA TESTING ACCOUNT

1 Monthly Account Summary

2 Account #: 1004315216

3 Cleared Charges within September 5, 2019 to October 4, 2019

Document date	Document #	Description	Amount USD	Notes
09/06/2019	0840993820	Subscription Invoice	40,545.89	
09/23/2019		Credit Card Payment	-40,545.89	PAYMENT RECEIVED - THANK YOU
08/22/2019	6129881778	New Sale Invoice	342.07	CO CR S/F (2V) FULL SET
09/16/2019	024179835	Electronic Payment	-342.07	PAYMENT RECEIVED - THANK YOU

4 Open Balance Through October 4, 2019

Document date	Document #	Description	Amount USD	Notes	Due Date
08/01/2019	0840682354	Online Invoice	131,438.91		08/31/2019
09/01/2019	0840852231	Online Invoice	135,083.18		10/01/2019
09/01/2019	0840852231	Online Invoice	608.25		10/01/2019
10/01/2019	6128741365	Electronic Payment	-308.51	Duplicate payment-6128741366	10/01/2019
09/05/2019	6130292035	Duplicate Payment			
09/05/2019	6130292035	New Sale Invoice	199.18	+ UCC OFF TEXT COMMENTS 2017-2018 PAM	10/05/2019

Balance Open in USD as of October 4, 2019 **267,021.01**

5 Open Prepayment through October 4, 2019

Document date	Description	Amount USD
07/15/2019	Auto Prepay ID 0000056071	-287,835.99
08/26/2019	Auto Prepay ID 0000056533	-39,041.18

The Monthly Account Summary is a comprehensive report of all account activity for the current subscription billing period. Go to <http://myaccount.tr.com/westlaw> if need more details around these invoices.

If you have questions about your outstanding balance, please contact our Account Receivable area by calling 1-800-522-0552 and select account information.

Existing Credit Notification Email

Customers currently signed up for e-Invoicing will continue to receive the existing email format for Online credits.

Existing Functionality

- Credit notification PDF is attached to email

 THOMSON REUTERS

E-BILLING:
SECURE, CONVENIENT, PAPERLESS BILLING



YOUR E-BILLING CREDIT NOTIFICATION IS ATTACHED

Dear Thomson Reuters Customer,

A credit was issued to your account as the result of a returned product or an account adjustment. For your reference, a PDF of the detailed credit notification is attached. This credit may have already been applied to charges on your account. To see the current status of your credit, please visit [My Account](#)

West Account	#XXXXXX5216
Credit Notification	#6134557659
Location:	TANYA TEST ACCOUNT
Amount:	\$118.03 CR USD

Please do not reply directly to this email message.

Thank you for your business.

Time Savings Tip
You can now find answers 24/7 to commonly asked questions online at [Customer Service Support](#). Find information on **billing**, returns, refunds, account maintenance, **OnePass**, orders, subscriptions, contracts and more.

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[Privacy Policy](#)

New Credit Note Email

Customers currently signed up for e-Invoicing will receive the new e-Invoicing email format for their Print credits.

Enhancements

- New simplified format
- Hyperlinks throughout the document:
 - View current status of your credit - linked to [My Account](#)
 - Commonly Asked Questions - linked to [Customer Support Site](#)
 - Sign up for Auto Pay - linked to [Auto Pay sign up or updates](#)
 - Privacy Policy - linked to the policy

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Dear Tanya Test

Please find your Credit note attached.

Account Number
1004315216 **Credit Number**
6132943022

Credit amount in USD
- 345.13

Payment not required for credit amount

The credit was issued to your account as the result of a returned product or an account adjustment. For your reference, a PDF of the detailed credit note is attached. This credit may have already been applied to charges on your account. To see the current status of your credit, please visit <http://myaccount.tr.com/westlaw>

Thank you for your continued business.

Thomson Reuters

Need help and support?

- You can now find answers 24/7 to [commonly asked questions](#).
- If you want to [sign up for Auto Pay](#), it's fast, convenient, & secure.
- Want to save some time and effort? We now can provide your invoice information in an Easy Import file. Click [Here](#) to find out more and [get setup](#) today.



Go Green by [signing up for e-Invoicing](#). It's easy, convenient, and secure to get your invoice by email delivery. Sign up today and enjoy all the benefits of paperless billing.

- **Easy for you** – open an email instead of an envelope
- **Good for the environment** – less paper means less waste
- **Secure for your office** – invoice pdf is emailed to a designated party or parties
- **Synced delivery** - if you are signed up for e-Invoicing, you will automatically receive credit notes via email pdf

1

When you are signed up for e-Invoicing you will automatically receive a Credit note when a credit is issued to your account.

Related Article: [How do I know when a credit has been issued on my account?](#)

2

High-level information about this credit can be found at the top right corner including the credit number, account number, credit date, and if applicable the purchase order number.

3

Identify your total credit amount at a glance.

4

The Product Detail section will include line item detail for the products or services for which you are receiving a credit including quantity, unit price, tax, and total.

5

The Credit Information section will include details of the original invoice that was credited, the Credit Type, and the Reason for the credit.

6

This section includes general information on how credits are applied when the original invoice has already been paid. If you have not yet made a payment against the original invoice, it is recommended that you underpay the referenced invoice by the Credit Amount shown. Log on to [My Account](#) to view your adjusted invoice balance or to view your credit history.

Related Articles: [What is my current account balance?](#)
[Do I have any credits?](#)

2

If you still have questions on your Credit note, please have your billing account number available when contacting us to ensure you are routed in the most efficient way.

Call us Monday through Friday
7:00 a.m. - 7:00 p.m. CST

1-800-328-4880

Note: All prices and account details on this Credit note have been modified and are for example purposes only.

1

Credit note

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610 Opperman Drive
Eagan MN 55123-1396

Page 1 of 1
TANYA TESTING ACCOUNT

Credit #: 6132700945
Account #: 1004315216
Credit date: March 27, 2020
Purchase order #:

Credit Amount in USD
-126.93
Payment not required
for credit amount

TANYA TESTING ACCOUNT
610 OPPERMAN DR
EAGAN, MN 55123-1340

4

Product Detail	Quantity	Unit Price USD	Charge Price USD	Tax USD	Total USD
ADMINISTRATIVE LAW PRACTICE AND PROCEDURE SUB	1	-118.49	-118.49	-8.44	-126.93

5

Credit information:
Credit for reference #: 6129187678
Credit for invoice#: 0840648574
Credit Type: Print Credit
Reason: Retro-bill - Pricing Error

6 This credit note will be applied to the reference/invoice number posted above. If the invoice has already been paid, the credit memo will be applied to any aged invoices and a refund check will be issued for any remaining credit balance.

Additional details:

Log on to MyAccount to view your Credit History <http://myaccount.tr.com/westlaw>