

## 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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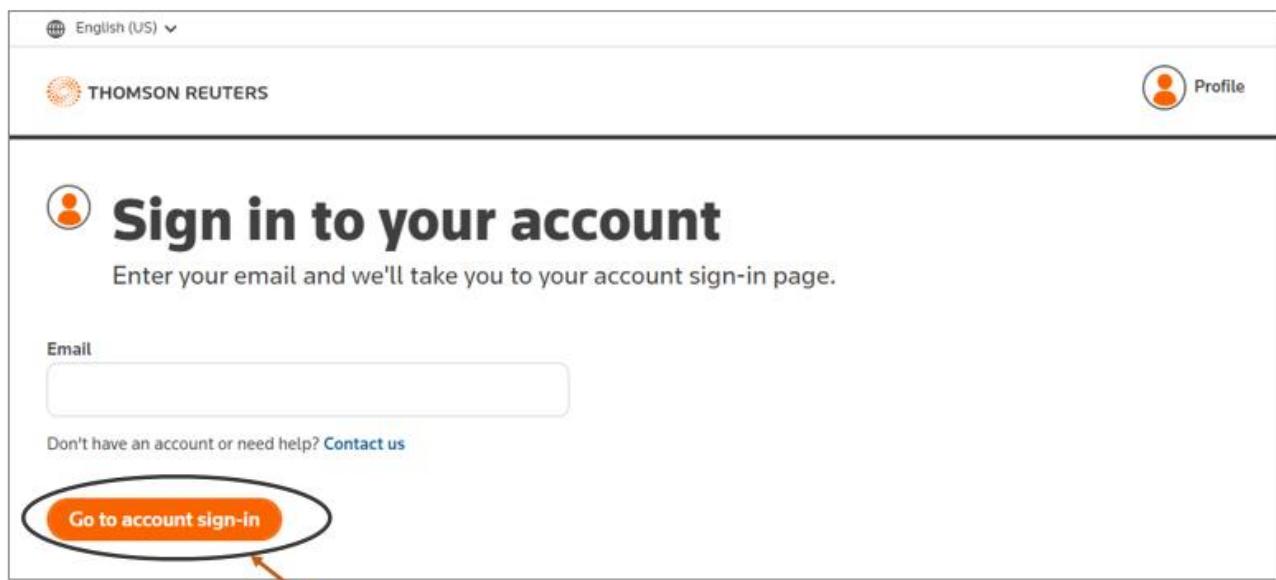
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## SIGN-IN TO SELF-SERVICE PORTAL

### 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**.



English (US) ▾

THOMSON REUTERS

Profile

## Sign in to your account

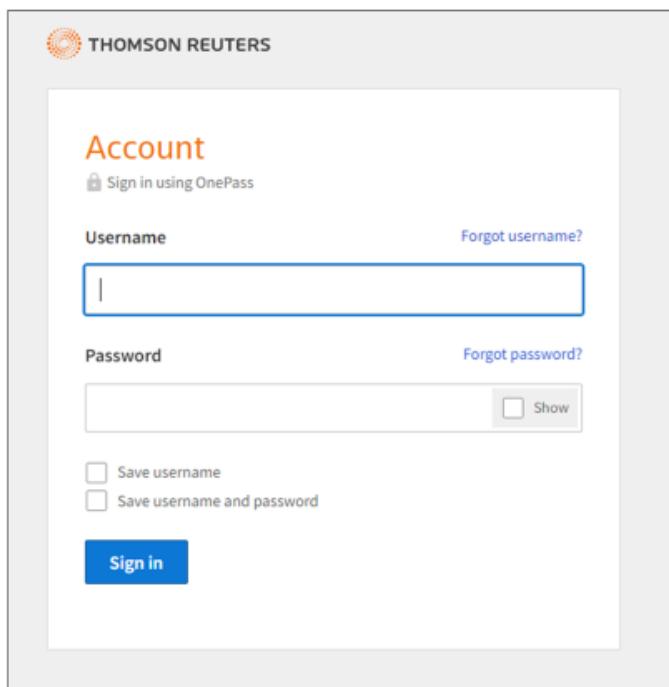
Enter your email and we'll take you to your account sign-in page.

Email

Don't have an account or need help? [Contact us](#)

**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).



THOMSON REUTERS

### Account

[Sign in using OnePass](#)

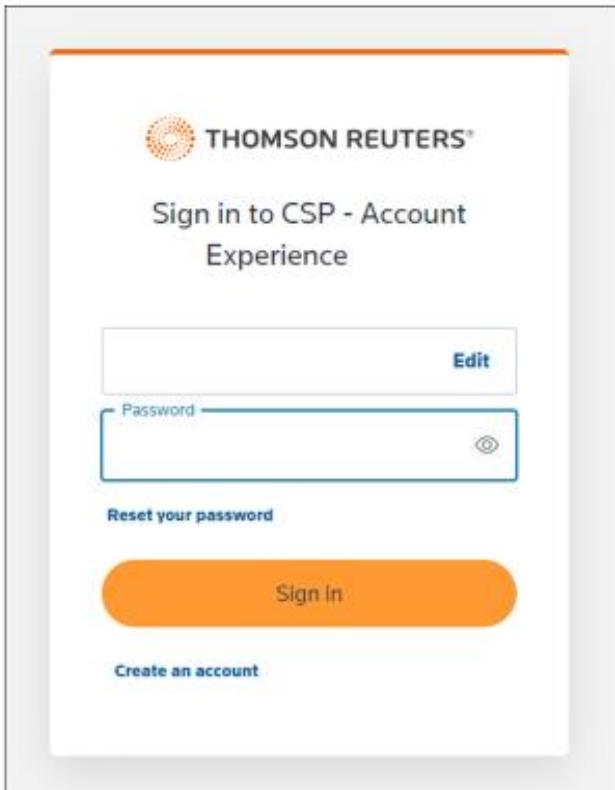
Username [Forgot username?](#)

Password [Forgot password?](#)

  Show

Save username  
 Save username and password

**Sign in**



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.

English (US) ▾

THOMSON REUTERS

Profile

 **We couldn't take you to account sign-in**

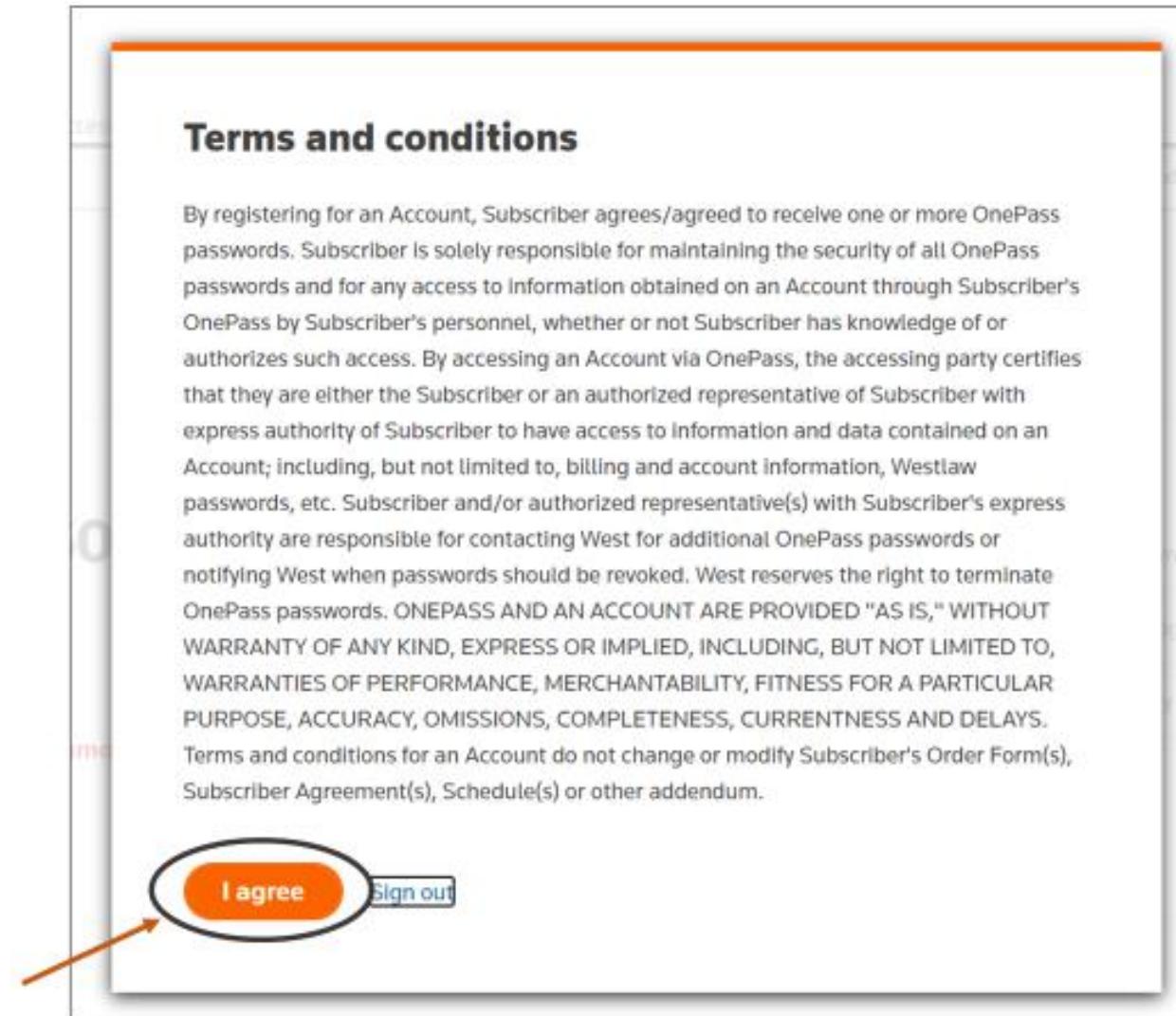
Looks like there's a technical issue preventing us from taking you to your account sign-in page.

Here is what you can do:

- [Sign in to Tax](#) if you have a **tax product**.
- [Sign in to Legal](#) if you have a **legal product**.
- [Contact us](#) to register for an account, or if you need help.

## 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.



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.

Invoice	Title	Invoice date	Due by	Status	Amount (USD)	Actions
<input type="checkbox"/> 1400463026	WO CW sm balance	Apr 23, 2022	Apr 23, 2022	① Past due	\$0.01	
<input type="checkbox"/> 0846393500	Subscription	May 01, 2022	Jun 03, 2022	① Past due	\$100.70	
<input type="checkbox"/> 0846393501	Subscription	May 02, 2022	May 11, 2022	① Past due	\$53.57	
<input type="checkbox"/> 08463930794	West Information Charges	May 03, 2022	May 31, 2022	① Past due	\$9,861.00	

OpenPaid invoices

Invoices and creditsExport open invoice list to file

---

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

Viewing 1 - 10 Previous 1 2 3 NextRows 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.

Account number: [REDACTED]

# 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**

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

[Export paid invoice list to file !\[\]\(96b2154c2318c2a77a97af5ed740d314\_img.jpg\)](#)

## View Invoice Details

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

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	<input type="button" value="Actions"/>
<input type="checkbox"/> 084537694	Subscription	Nov 01, 2021	Nov 11, 2021	Payment pending	\$154.28	<input type="button" value="Actions"/>
<input type="checkbox"/> 0845646956	West Information Charges	Jan 03, 2022	Jan 08, 2022	Payment pending	\$9,861.00	<input type="button" value="Actions"/>

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

Invoice	Title	Invoice date	Due by	Status	Actions
<input type="checkbox"/> 0845543364	Subscription	Dec 01, 2021	Dec 11, 2021	<span style="color: red;">! Past due</span>	<input type="button" value="Actions"/>
<input type="checkbox"/> 0844389694	Partial Balance	Dec 07, 2021	May 04, 2021	<span style="color: red;">! Past due</span>	<input type="button" value="Actions"/>
<input type="checkbox"/> 0845459756	Partial Balance	Jan 24, 2022	Dec 08, 2021	<span style="color: red;">! Past due</span>	<input type="button" value="Actions"/>

Then, view invoice.

[← Back to billing](#)

# Invoice 0845543

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

Selected amount (USD)  
**\$154.28**

[Pay amount](#)

**Details**

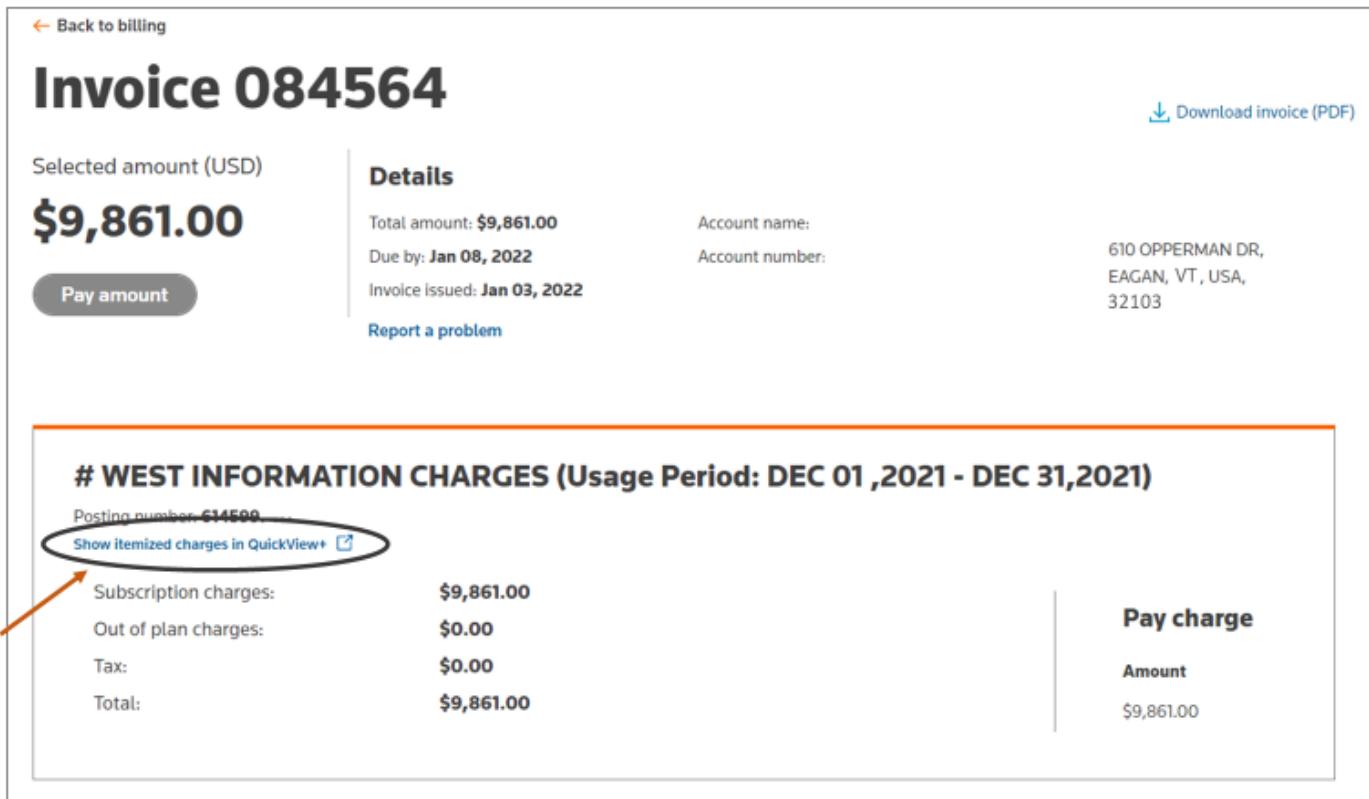
Total amount: \$154.28  
Due by: Dec 12, 2021  
Invoice issued: Dec 01, 2021  
[Report a problem](#)

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

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

## 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

Selected amount (USD)  
**\$9,861.00**

[Pay amount](#)

**Details**

Total amount: \$9,861.00	Account name:
Due by: Jan 08, 2022	Account number:
Invoice issued: Jan 03, 2022	610 OPPERMAN DR, EAGAN, VT, USA, 32103

[Report a problem](#)

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

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

Posting number: 614500	
<a href="#">Show itemized charges in QuickView+</a>	
Subscription charges:	\$9,861.00
Out of plan charges:	\$0.00
Tax:	\$0.00
Total:	<b>\$9,861.00</b>

**Pay charge**

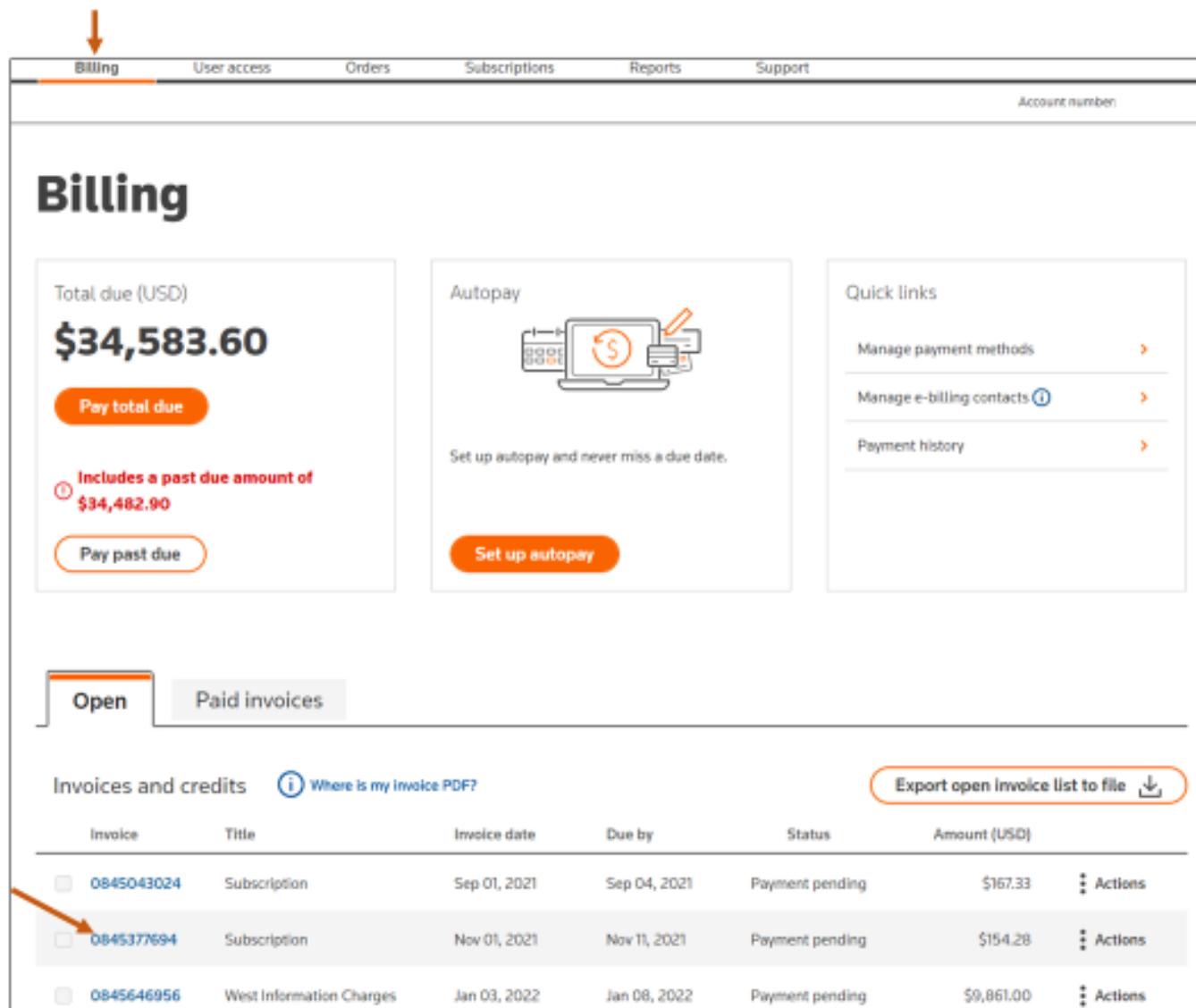
**Amount**  
\$9,861.00

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).



The screenshot shows the 'Billing' tab selected in the top navigation bar. The main content area is titled 'Billing' and displays the following information:

- Total due (USD): \$34,583.60**
- Pay total due** button
- Includes a past due amount of \$34,482.90**
- Pay past due** button
- Autopay** section with an icon of a laptop and a credit card, and the text: "Set up autopay and never miss a due date." Includes a **Set up autopay** button.
- Quick links** section with three items: "Manage payment methods", "Manage e-billing contacts", and "Payment history".
- Invoices and credits** section with a table:

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	
<input type="checkbox"/> 0845177694	Subscription	Nov 01, 2021	Nov 11, 2021	Payment pending	\$154.28	
<input type="checkbox"/> 0845646956	West Information Charges	Jan 03, 2022	Jan 08, 2022	Payment pending	\$9,861.00	

An orange arrow points to the invoice number 0845177694 in the list.

**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	<a href="#">View details</a> <a href="#">Download invoice</a>
<input type="checkbox"/> 0845377694	Subscription	Nov 01, 2021	Nov 11, 2021	Payment pending	<a href="#">View details</a> <a href="#">Download invoice</a>	<a href="#">Actions</a>
<input type="checkbox"/> 0845646956	West Information Charges	Jan 03, 2022	Jan 08, 2022	Payment pending	\$9,861.00	<a href="#">View details</a> <a href="#">Download invoice</a>

**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](#)

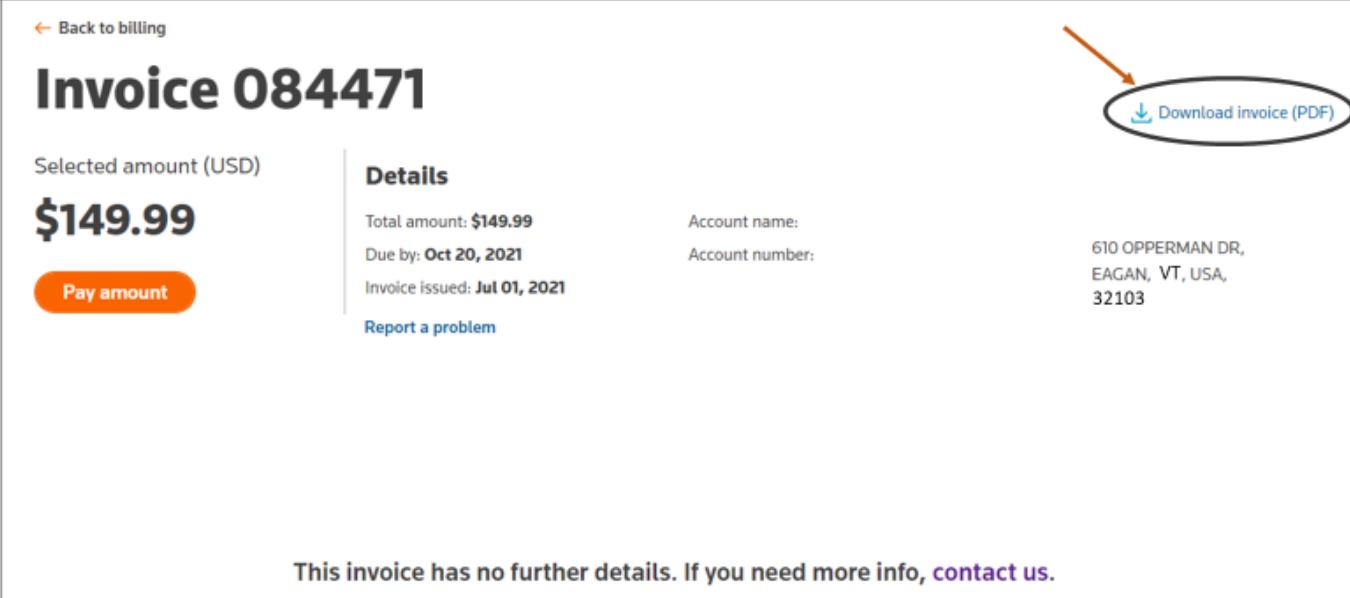
**Open** **Paid invoices**

**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"/> 0845543964	Subscription	Dec 01, 2021	Dec 11, 2021	<span>① Past due</span>	<a href="#">Pay invoice</a>
<input type="checkbox"/> 0844509694	Partial Balance	Dec 07, 2021	May 04, 2021	<span>① Past due</span>	<a href="#">View details</a>
<input type="checkbox"/> 0845459756	Partial Balance	Jan 24, 2022	Dec 08, 2021	<span>① Past due</span>	<a href="#">Download invoice</a>
<input type="checkbox"/> 0845124537	Partial Balance	Jan 24, 2022	Oct 08, 2021	<span>① Past due</span>	<a href="#">\$3,167.88</a>
					<a href="#">Actions</a>

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



Invoice 084471

Selected amount (USD)  
**\$149.99**

[Pay amount](#)

**Details**

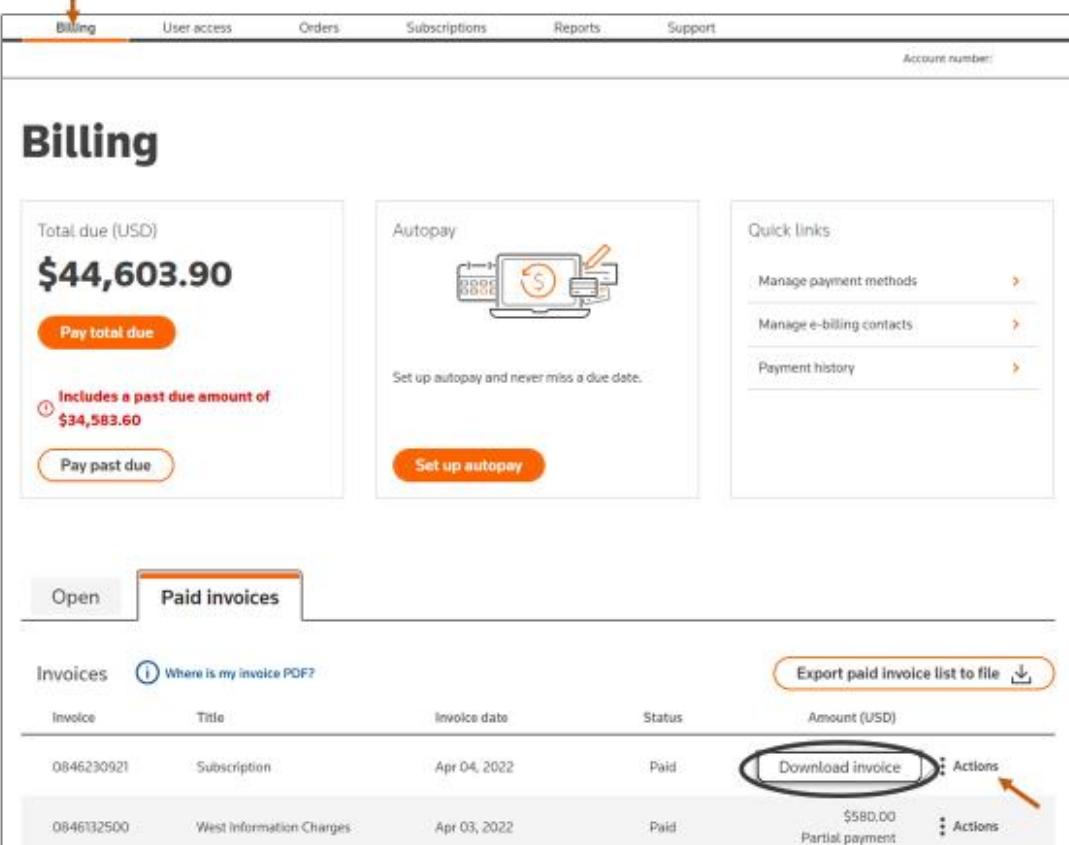
Total amount: **\$149.99**  
Due by: **Oct 20, 2021**  
Invoice issued: **Jul 01, 2021**

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

[Report a problem](#)

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**

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](#)

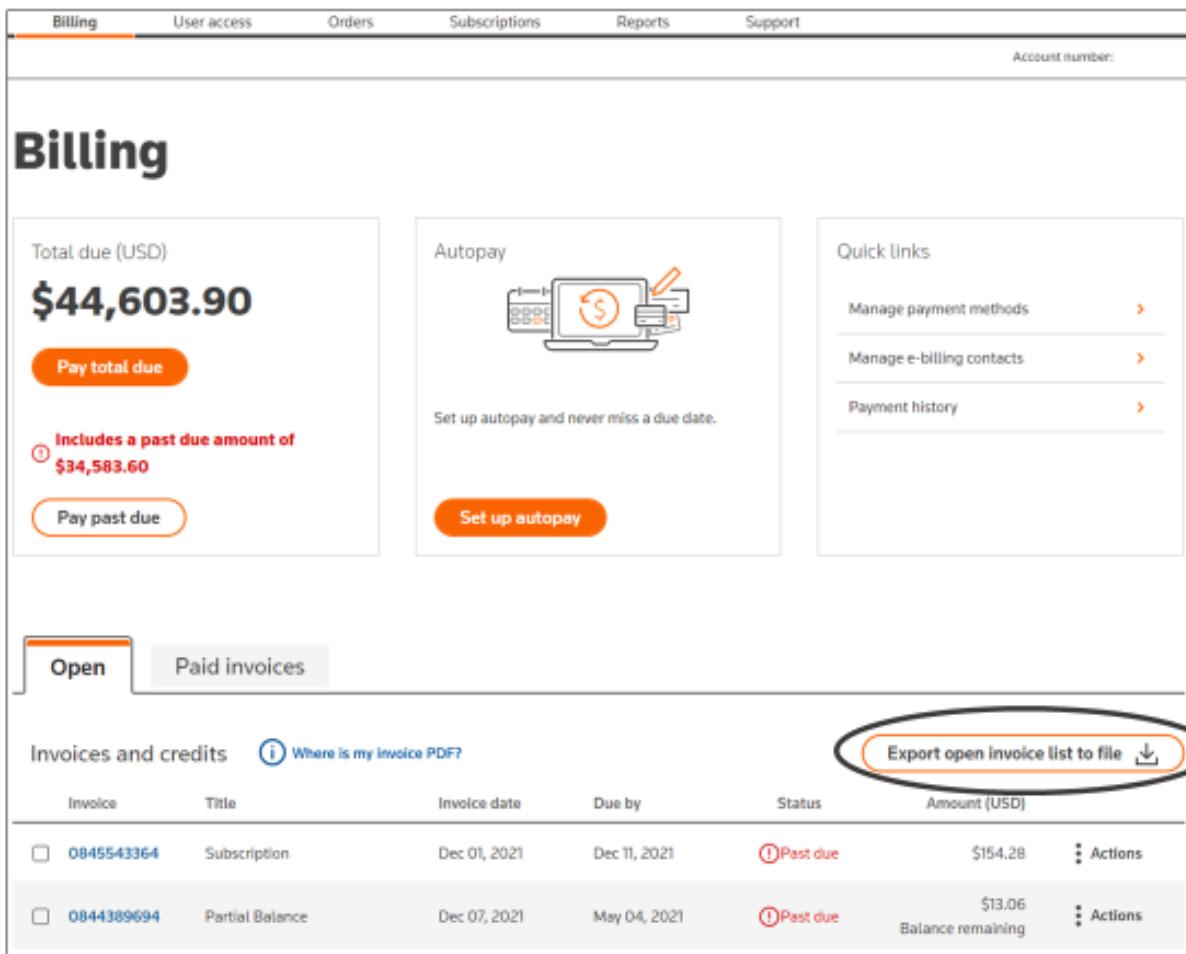
Invoices [Where is my invoice PDF?](#)

Invoice	Title	Invoice date	Status	Amount (USD)
0846230921	Subscription	Apr 04, 2022	Paid	<a href="#">Download invoice</a>
0846132500	West Information Charges	Apr 03, 2022	Paid	\$580.00 Partial payment

[Export paid invoice list to file](#)

## 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 Thomson Reuters Self-Service Portal. At the top, there is a navigation bar with tabs: Billing (which is selected and highlighted in orange), User access, Orders, Subscriptions, Reports, and Support. Below the navigation bar, there is a field for 'Account number:'.

The main content area is titled 'Billing'. It features three main sections: 'Total due (USD)' showing '\$44,603.90', 'Autopay' with a 'Set up autopay' button, and 'Quick links' for 'Manage payment methods', 'Manage e-billing contacts', and 'Payment history'.

Below these sections, there are two tabs: 'Open' (which is selected and highlighted in orange) and 'Paid invoices'. Under the 'Open' tab, there is a table titled 'Invoices and credits' with two rows. The columns are: Invoice, Title, Invoice date, Due by, Status, and Amount (USD). The first row has an invoice number '0845543364' for a 'Subscription' due on Dec 11, 2021, with a status of 'Past due' and an amount of '\$154.28'. The second row has an invoice number '0844389694' for a 'Partial Balance' due on May 04, 2021, with a status of 'Past due' and an amount of '\$13.06'. Each row has an 'Actions' button.

At the bottom right of the table, there is a button labeled 'Export open invoice list to file' with a download icon. An orange arrow points to this button, and it is circled with a black oval.

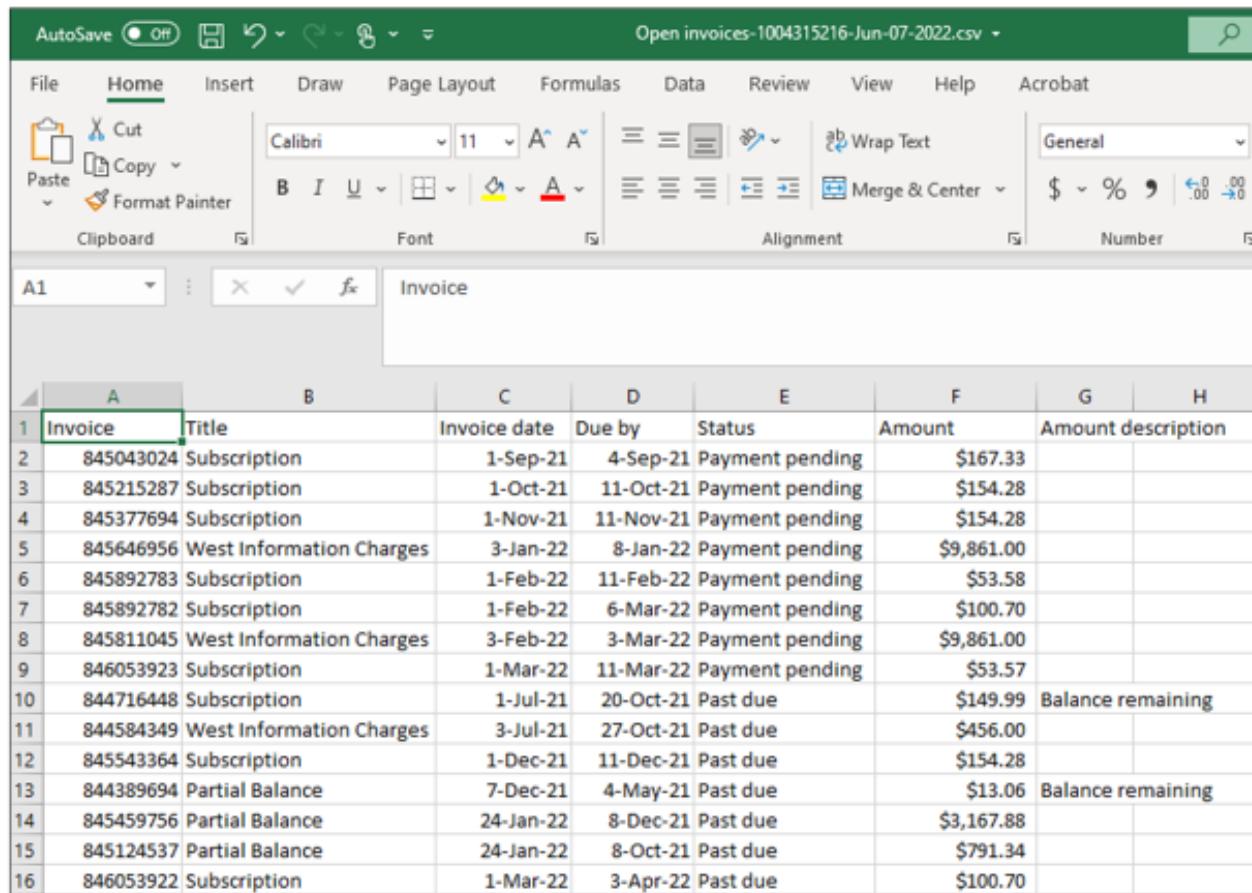
Invoice	Title	Invoice date	Due by	Status	Amount (USD)	Actions
<input type="checkbox"/> 0845543364	Subscription	Dec 01, 2021	Dec 11, 2021	① Past due	\$154.28	
<input type="checkbox"/> 0844389694	Partial Balance	Dec 07, 2021	May 04, 2021	① Past due	\$13.06 Balance remaining	

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 shows the 'Billing' section of the portal. At the top, there are tabs for Billing, User access, Orders, Subscriptions, Reports, and Support. An account number is displayed. The Billing section includes a summary of total due (\$44,603.90), a link to pay total due, and a note about past due amounts. It also features an Autopay section with a link to set it up. On the right, there are quick links for managing payment methods, e-billing contacts, and payment history. Below this, there is a table for invoices and credits. A blue status bar is overlaid on the table, indicating 'Preparing open invoice list for download. File will download when ready.' A green status bar below it says 'Open invoices list successfully downloaded. Please check downloads folder.' An orange arrow points to a 'File exported' button with a checkmark in the top right corner of the table area.

Invoice	Title	Invoice date	Due by	Status	Amount (USD)	Actions
<input type="checkbox"/> 0845543364	Subscription				\$154.28	<span>⋮ Actions</span>
<input type="checkbox"/> 0845520004	Partial Balance				\$13.06	<span>⋮ Actions</span>

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.**



	A	B	C	D	E	F	G	H
1	Invoice	Title	Invoice date	Due by	Status	Amount	Amount description	
2	845043024	Subscription	1-Sep-21	4-Sep-21	Payment pending	\$167.33		
3	845215287	Subscription	1-Oct-21	11-Oct-21	Payment pending	\$154.28		
4	845377694	Subscription	1-Nov-21	11-Nov-21	Payment pending	\$154.28		
5	845646956	West Information Charges	3-Jan-22	8-Jan-22	Payment pending	\$9,861.00		
6	845892783	Subscription	1-Feb-22	11-Feb-22	Payment pending	\$53.58		
7	845892782	Subscription	1-Feb-22	6-Mar-22	Payment pending	\$100.70		
8	845811045	West Information Charges	3-Feb-22	3-Mar-22	Payment pending	\$9,861.00		
9	846053923	Subscription	1-Mar-22	11-Mar-22	Payment pending	\$53.57		
10	844716448	Subscription	1-Jul-21	20-Oct-21	Past due	\$149.99	Balance remaining	
11	844584349	West Information Charges	3-Jul-21	27-Oct-21	Past due	\$456.00		
12	845543364	Subscription	1-Dec-21	11-Dec-21	Past due	\$154.28		
13	844389694	Partial Balance	7-Dec-21	4-May-21	Past due	\$13.06	Balance remaining	
14	845459756	Partial Balance	24-Jan-22	8-Dec-21	Past due	\$3,167.88		
15	845124537	Partial Balance	24-Jan-22	8-Oct-21	Past due	\$791.34		
16	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**.

The screenshot shows the 'Billing' section of the portal. At the top, there are tabs for 'Billing', 'User access', 'Orders', 'Reports', and 'Support'. Below the tabs, there is a placeholder for 'Account number'. The main area is titled 'Billing' and displays a message: 'Your account is up to date' and 'No payment due'. It also features a 'Autopay' section with a 'Set up autopay' button. To the right, there is a 'Quick links' sidebar with 'Manage payment methods', 'Manage e-billing contacts', and 'Payment history'. Below these sections, there are two tabs: 'Open' and 'Paid invoices', with 'Paid invoices' being the active tab. A red arrow points to the 'Paid invoices' tab. In the bottom right corner of the main area, there is a button labeled 'Export paid invoice list to file' with a downward arrow icon, which is also highlighted with a red oval and a red arrow pointing to it.

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

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 the portal. At the top, there are tabs for Billing, User access, Orders, Reports, and Support. An account number is displayed. The main area is titled 'Billing' and shows a message: 'Your account is up to date' and 'No payment due'. Below this, there is an icon of a document with a checkmark. To the right, there is a 'Autopay' section with an icon of a laptop and a credit card, and a 'Set up autopay' button. On the right side, there is a 'Quick links' panel with 'Manage payment methods', 'Manage e-billing contacts', and 'Payment history'. Below these, there is a table titled 'Invoices' with two rows: '0845972625' (Invoice) and '6146919210' (Subscription). The 'Paid invoices' tab is selected. A blue status bar at the top of the table area says 'Preparing paid invoice list for download. File will download when ready.' A green status bar at the bottom of the table area says 'Paid invoices list successfully downloaded. Please check downloads folder.' A red arrow points to a 'File exported' dropdown menu on the right, which contains a checked option. A large black oval encircles the two status bars.

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

## 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.

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

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

The screenshot shows the Thomson Reuters Self-Service Portal's Billing section. At the top, there is a navigation bar with tabs: Billing (which is highlighted with an orange underline), User access, Orders, Subscriptions, Reports, and Support. Below the navigation bar is a search bar labeled "Account number:".

The main area is titled "Billing". On the left, there is a summary box showing "Total due (USD) \$34,583.60" with a "Pay total due" button. Below this, a note says "Includes a past due amount of \$34,482.90" with a "Pay past due" button.

In the center, there is a "Autopay" section with an icon of a laptop and a credit card, and a button to "Set up autopay". Below this, there is a note: "Set up autopay and never miss a due date.".

On the right, there is a "Quick links" section with three items: "Manage payment methods", "Manage e-billing contacts", and "Payment history".

At the bottom, there is a table titled "Invoices and credits" with the "Open" tab selected. The table has columns: Invoice, Title, Invoice date, Due by, Status, and Actions. There are three rows of data:

Invoice	Title	Invoice date	Due by	Status	Actions
0845543364	Subscription	Dec 01, 2021	Dec 11, 2021	① Past due	<a href="#">Pay invoice</a> <a href="#">View details</a> <a href="#">Download invoice</a> <a href="#">Balance remaining</a>
0844389694	Partial Balance	Dec 07, 2021	May 04, 2021	① Past due	<a href="#">Pay invoice</a> <a href="#">View details</a> <a href="#">Download invoice</a> <a href="#">Balance remaining</a>
0845459756	Partial Balance	Jan 24, 2022	Dec 08, 2021	① Past due	<a href="#">Pay invoice</a> <a href="#">View details</a> <a href="#">Download invoice</a> <a href="#">Balance remaining</a>

A dropdown menu is open over the first invoice row, showing options: "Pay invoice", "View details", "Download invoice", and "Balance remaining". The "Pay invoice" option is highlighted with a red oval. An arrow points from the text "Click Actions from the Open tab and then select Pay invoice." to the "Actions" button in the dropdown menu.

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



**Billing**

Total due (USD)  
**\$34,583.60**

[Pay total due](#)

① 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](#) 

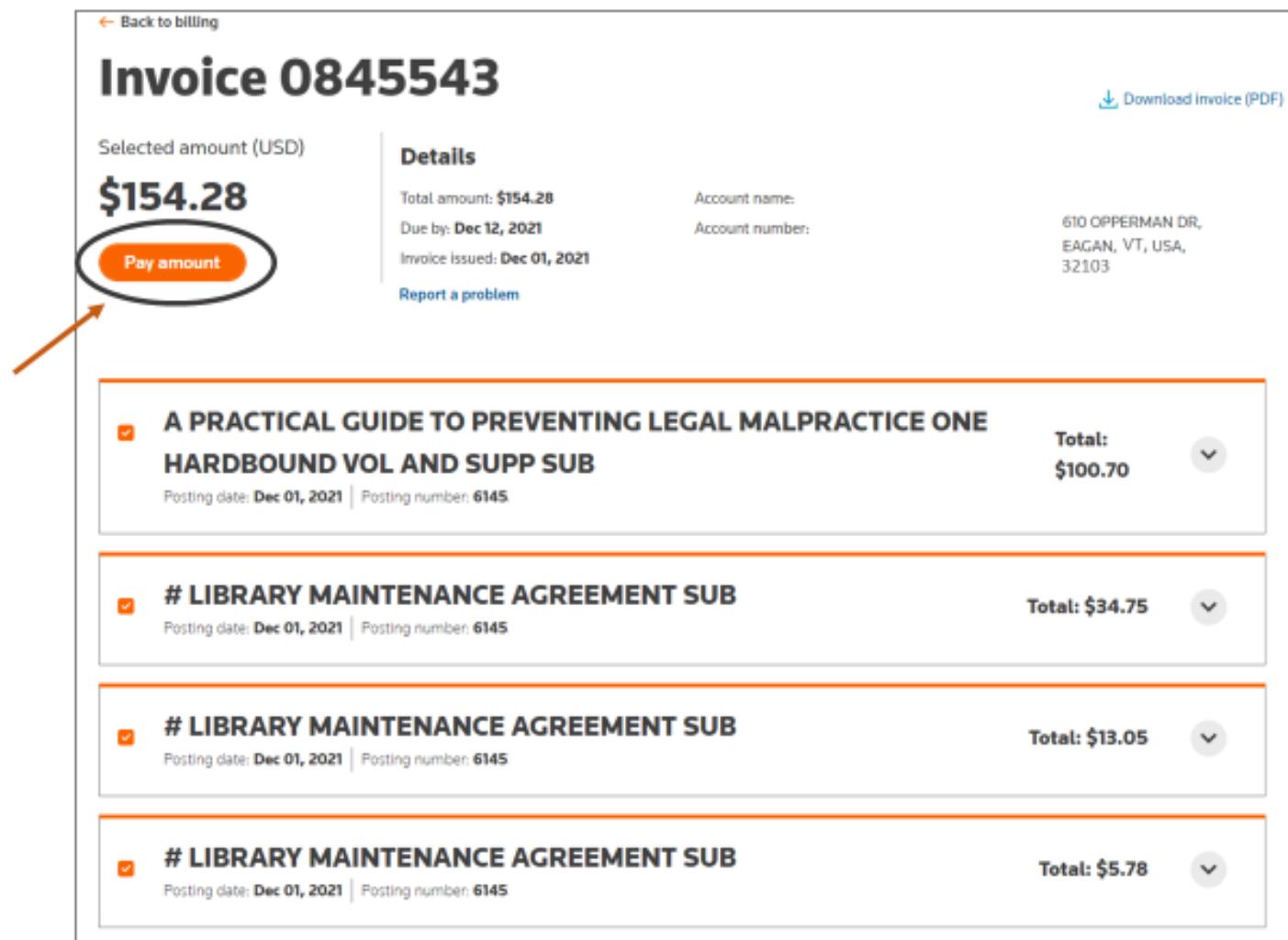
[Payment history](#) 

**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"/> 0845543364	Subscription	Dec 01, 2021	Dec 11, 2021	① Past due	\$154.28	
<input type="checkbox"/> 0844389694	Partial Balance	Dec 07, 2021	May 04, 2021	① Past due	\$13.06 Balance remaining	

Next, click **Pay amount**.



Invoice 0845543

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**  
Report a problem

**610 OPPERMANN DR,  
EAGAN, VT, USA,  
32103**

**A PRACTICAL GUIDE TO PREVENTING LEGAL MALPRACTICE ONE HARDBOUND VOL AND SUPP SUB** **Total: \$100.70**

Posting date: **Dec 01, 2021** | Posting number: **6145**

**# LIBRARY MAINTENANCE AGREEMENT SUB** **Total: \$34.75**

Posting date: **Dec 01, 2021** | Posting number: **6145**

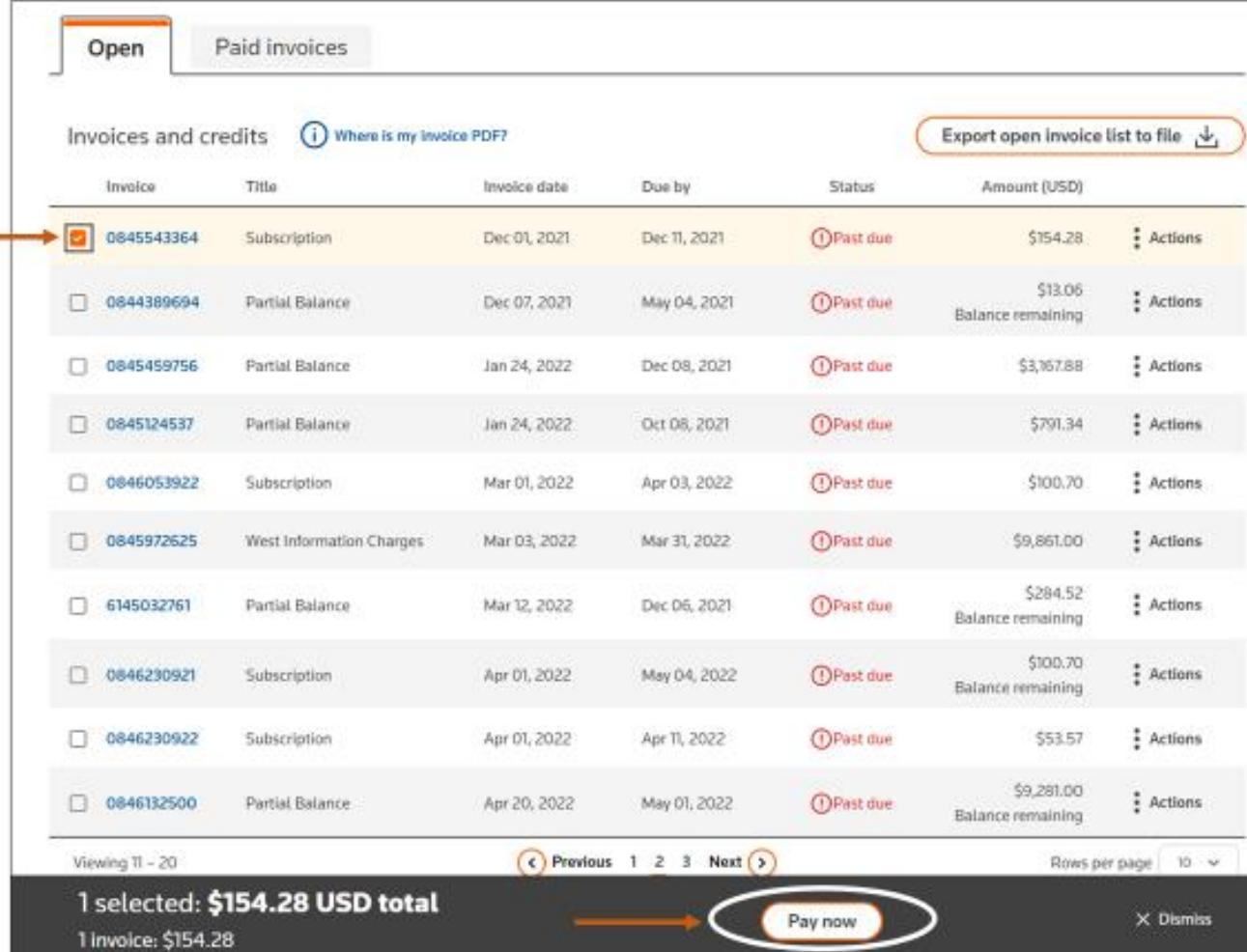
**# LIBRARY MAINTENANCE AGREEMENT SUB** **Total: \$13.05**

Posting date: **Dec 01, 2021** | Posting number: **6145**

**# LIBRARY MAINTENANCE AGREEMENT SUB** **Total: \$5.78**

Posting date: **Dec 01, 2021** | Posting number: **6145**

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.



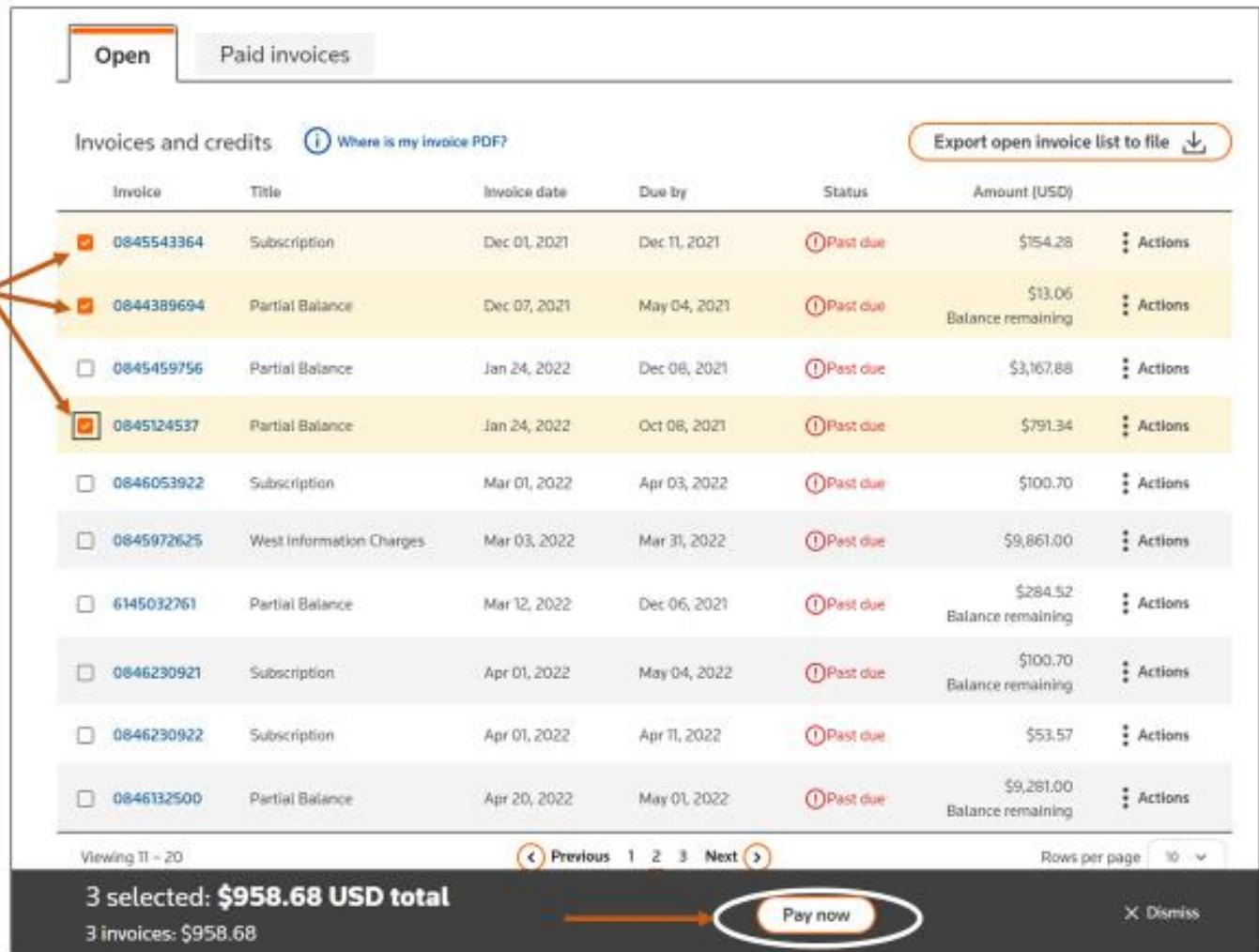
**Invoices and credits** (i) Where is my invoice PDF? Export open invoice list to file

Invoice	Title	Invoice date	Due by	Status	Amount (USD)	Actions
<input checked="" type="checkbox"/> 0845543364	Subscription	Dec 01, 2021	Dec 11, 2021	① Past due	\$154.28	<span>Actions</span>
<input type="checkbox"/> 0844389694	Partial Balance	Dec 07, 2021	May 04, 2021	① Past due	\$13.06	Balance remaining
<input type="checkbox"/> 0845459756	Partial Balance	Jan 24, 2022	Dec 08, 2021	① Past due	\$3,167.88	<span>Actions</span>
<input type="checkbox"/> 0845124537	Partial Balance	Jan 24, 2022	Oct 08, 2021	① Past due	\$791.34	<span>Actions</span>
<input type="checkbox"/> 0846053922	Subscription	Mar 01, 2022	Apr 03, 2022	① Past due	\$100.70	<span>Actions</span>
<input type="checkbox"/> 0845972625	West Information Charges	Mar 03, 2022	Mar 31, 2022	① Past due	\$9,861.00	<span>Actions</span>
<input type="checkbox"/> 6145032761	Partial Balance	Mar 12, 2022	Dec 06, 2021	① Past due	\$284.52	Balance remaining
<input type="checkbox"/> 0846230921	Subscription	Apr 01, 2022	May 04, 2022	① Past due	\$100.70	Balance remaining
<input type="checkbox"/> 0846230922	Subscription	Apr 01, 2022	Apr 11, 2022	① Past due	\$53.57	<span>Actions</span>
<input type="checkbox"/> 0846132500	Partial Balance	Apr 20, 2022	May 01, 2022	① Past due	\$9,281.00	Balance remaining

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.



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 checked="" type="checkbox"/> 0845543364	Subscription	Dec 01, 2021	Dec 11, 2021	① Past due	\$154.28	<a href="#">Actions</a>
<input checked="" type="checkbox"/> 0844389694	Partial Balance	Dec 07, 2021	May 04, 2021	① Past due	\$13.06 Balance remaining	<a href="#">Actions</a>
<input type="checkbox"/> 0845459756	Partial Balance	Jan 24, 2022	Dec 08, 2021	① Past due	\$3,167.88	<a href="#">Actions</a>
<input checked="" type="checkbox"/> 0845124537	Partial Balance	Jan 24, 2022	Oct 08, 2021	① Past due	\$791.34	<a href="#">Actions</a>
<input type="checkbox"/> 0846053922	Subscription	Mar 01, 2022	Apr 03, 2022	① Past due	\$100.70	<a href="#">Actions</a>
<input type="checkbox"/> 0845972625	West Information Charges	Mar 03, 2022	Mar 31, 2022	① Past due	\$9,861.00	<a href="#">Actions</a>
<input type="checkbox"/> 6145032761	Partial Balance	Mar 12, 2022	Dec 06, 2021	① Past due	\$284.52 Balance remaining	<a href="#">Actions</a>
<input type="checkbox"/> 0846230921	Subscription	Apr 01, 2022	May 04, 2022	① Past due	\$100.70 Balance remaining	<a href="#">Actions</a>
<input type="checkbox"/> 0846230922	Subscription	Apr 01, 2022	Apr 11, 2022	① Past due	\$53.57	<a href="#">Actions</a>
<input type="checkbox"/> 0846132500	Partial Balance	Apr 20, 2022	May 01, 2022	① Past due	\$9,281.00 Balance remaining	<a href="#">Actions</a>

Viewing 11 - 20 [Previous](#) [1](#) [2](#) [3](#) [Next](#) [Rows per page](#) [10](#) [▼](#)

3 selected: **\$958.68 USD total** [Pay now](#) [Dismiss](#)

3 invoices: \$958.68

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

The screenshot shows the 'Make a payment' page. On the left, a vertical orange line with numbered circles indicates the process: '1' is above the 'Payment method' section, and '2' is below it. The 'Payment method' section contains a dropdown menu with the following options:

- 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

An orange arrow points from the '1' circle to the dropdown menu. To the right of the dropdown is a 'Payment summary' box:

Payment summary	
<a href="#">View details</a>	
Total invoice amount	\$34,735.91
Credits applied (0)	\$0.00
<b>Remaining balance</b>	<b>\$34,735.91</b>

Below the dropdown menu is a 'Confirmation' section with a '2' circle. The page has a header 'Cancel and go back to billing' and a collapse/expand button in the top right.

Then, click **Next**.

The screenshot shows the 'Make a payment' page after the 'Next' button has been clicked. The process is now at step '2'. The 'Payment method' dropdown is empty. The 'Next' button is highlighted with a black oval and an orange arrow pointing to it. The 'Cancel' button is also visible. The 'Payment summary' box remains the same:

Payment summary	
<a href="#">View details</a>	
Total invoice amount	\$34,735.91
Credits applied (0)	\$0.00
<b>Remaining balance</b>	<b>\$34,735.91</b>

The 'Confirmation' section is present below the dropdown. The page has a header 'Cancel and go back to billing' and a collapse/expand button in the top right.

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

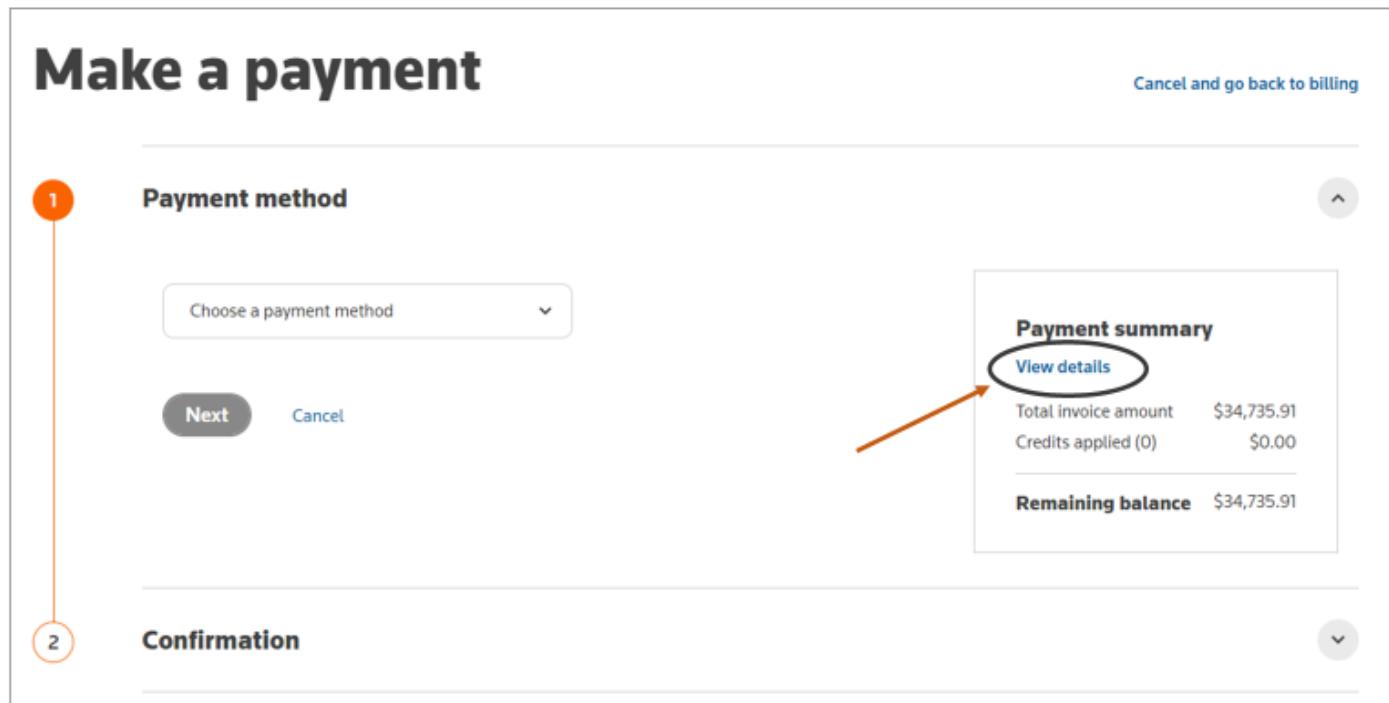
Your payment of **USD \$0.69** will be processed within 1 to 2 business days.

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.



**Make a payment**

**1** **Payment method**

Choose a payment method

Next Cancel

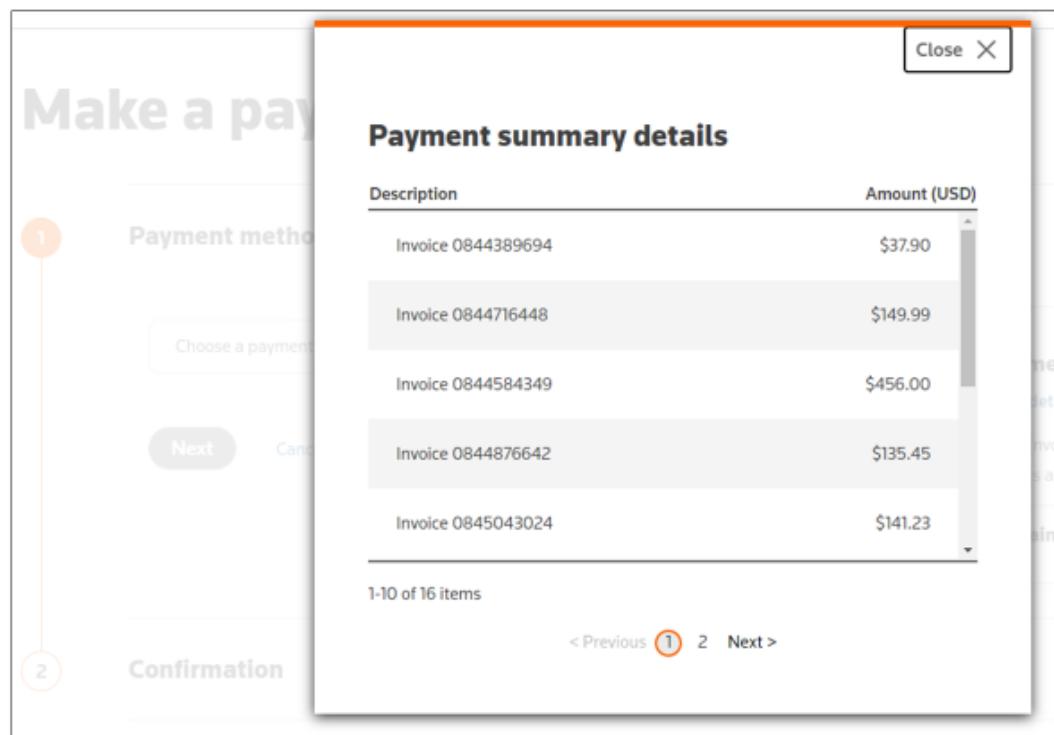
**2** **Confirmation**

**Payment summary**

**View details**

Total invoice amount	\$34,735.91
Credits applied (0)	\$0.00
<b>Remaining balance</b>	<b>\$34,735.91</b>

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



**Make a pay**

**1** **Payment method**

Choose a payment method

Next Cancel

**2** **Confirmation**

**Payment summary details**

Description	Amount (USD)
Invoice 0844389694	\$37.90
Invoice 0844716448	\$149.99
Invoice 0844584349	\$456.00
Invoice 0844876642	\$135.45
Invoice 0845043024	\$141.23

1-10 of 16 items

< Previous 1 2 Next >

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**.

## Make a payment

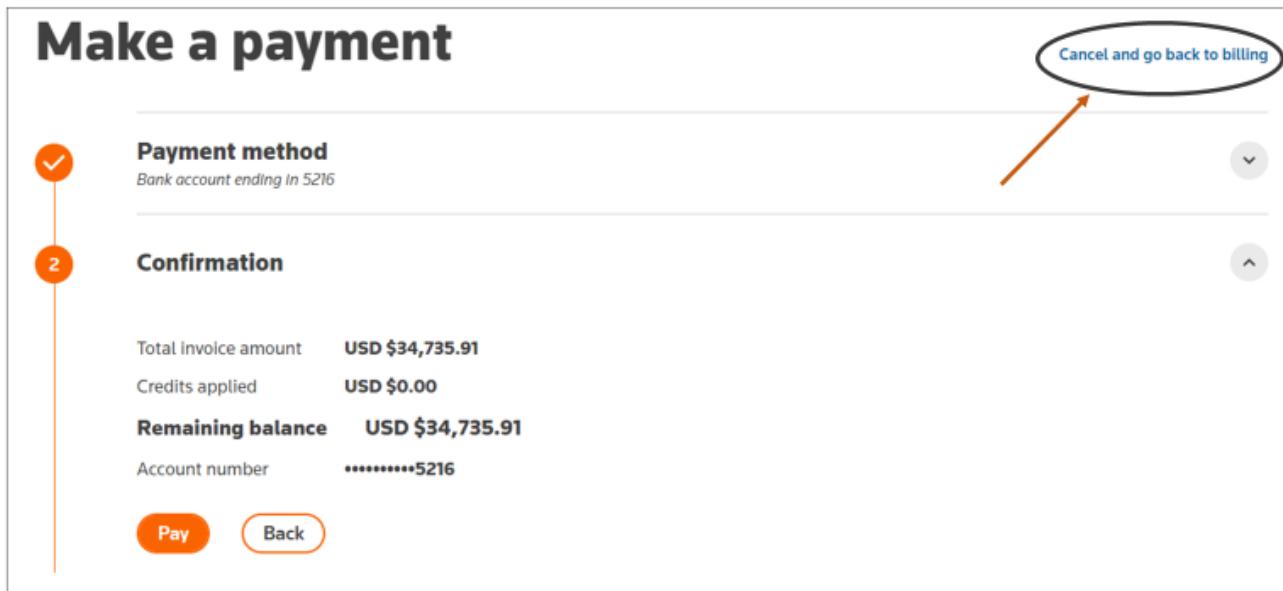
1 **Payment method**  
Bank account ending in 5216

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**

**Cancel and go back to billing**



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

## Make a payment

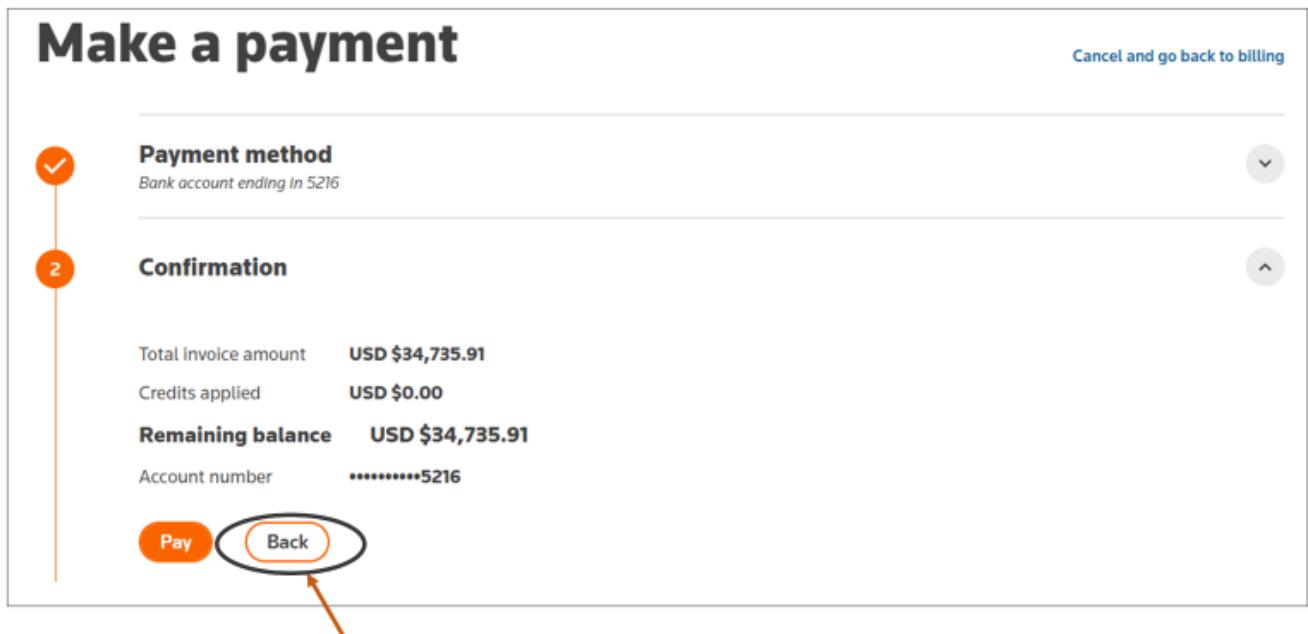
1 **Payment method**  
Bank account ending in 5216

2 **Confirmation**

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

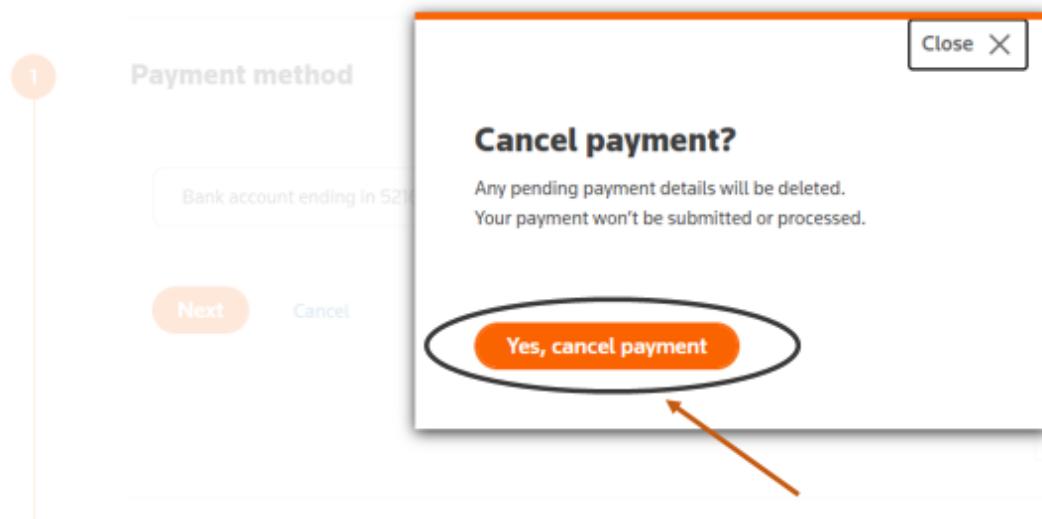
**Pay** **Back**

**Cancel and go back to billing**



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).

**Billing**

Total due (USD)  
**\$44,449.62**

[Pay total due](#)

① 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 GW sm balance	Apr 23, 2022	Apr 23, 2022	① Past due	\$0.01	<a href="#">Actions</a>
<input type="checkbox"/> 0846393500	Subscription	May 01, 2022	Jun 03, 2022	① Past due	\$100.70	<a href="#">Actions</a>
<input type="checkbox"/> 0846393501	Subscription	May 02, 2022	May 11, 2022	① Past due	\$53.57	<a href="#">Actions</a>
<input type="checkbox"/> 0846390794	West Information Charges	May 03, 2022	May 31, 2022	① Past due	\$9,861.00	<a href="#">Actions</a>

**Billing** [User access](#) [Orders](#) [Subscriptions](#) [Reports](#) [Support](#)

Account number:

## Billing

Total due (USD)  
**\$44,449.62**

[Pay total due](#)

① 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 GW sm balance	Apr 23, 2022	Apr 23, 2022	① Past due	\$0.01	<a href="#">Actions</a>
<input type="checkbox"/> 0846393500	Subscription	May 01, 2022	Jun 03, 2022	① Past due	\$100.70	<a href="#">Actions</a>
<input type="checkbox"/> 0846393501	Subscription	May 02, 2022	May 11, 2022	① Past due	\$100.70	<a href="#">Actions</a>
<input type="checkbox"/> 0846310794	West Information Charges	May 03, 2022	May 31, 2022	① Past due	\$9,861.00	<a href="#">Actions</a>

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

Invoice 08463

Selected amount (USD)  
**\$53.57**

[Pay amount](#)

**Details**

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

[Report a problem](#)

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

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

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
<a href="#">Report a problem</a>	

**# 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	<span>-</span> <span>1</span> <span>+</span>	\$6.32	\$6.77
<input checked="" type="checkbox"/> AR CODE ANNO COURT RULES SUB	1	<span>-</span> <span>1</span> <span>+</span>	\$4.59	\$4.92
<input checked="" type="checkbox"/> CA DRUNK DRIVING DEFENSE SUB	1	<span>-</span> <span>1</span> <span>+</span>	\$1.14	\$1.22
<input checked="" type="checkbox"/> CA DESKTOP PROB CODE ANNO SUB	1	<span>-</span> <span>1</span> <span>+</span>	\$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**.

The screenshot shows the 'Invoice 08463' page. At the top, the selected amount is \$39.81, with a 'Pay amount' button highlighted by a black oval and an orange arrow pointing to it. Below this, the 'Details' section shows the total amount as \$53.57, due by May 11, 2022, and the invoice issued on May 02, 2022. The address is 610 OPPERMAN DR, EAGAN, VT, USA, 32105. A 'Report a problem' link is also present. The main content area displays three sections of items:

- # 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
- # LIBRARY MAINTENANCE AGREEMENT SUB** (Total: \$0.00)  
Posting date: May 02, 2022 | Posting number: 614818

In the second section, there is a table with columns: Item, Billed, Selected to pay, Per item, and Total with tax. The table contains four rows, each with a checkbox. The first row has an unchecked checkbox. The second and third rows have checked checkboxes. The fourth row has an unchecked checkbox. Arrows point from the 'Pay amount' button to the first and fourth checkboxes in the table.

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

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.

Enrolled in autopay

## No payment due

Autopay

Your invoices will be paid automatically on or after the invoice date.

Payment method  
Visa ending in 9121

Manage autopay

Quick links

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

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

1

## Manage autopay

Change your payment method, or [turn off autopay](#).

2

Payment method

Choose a payment method

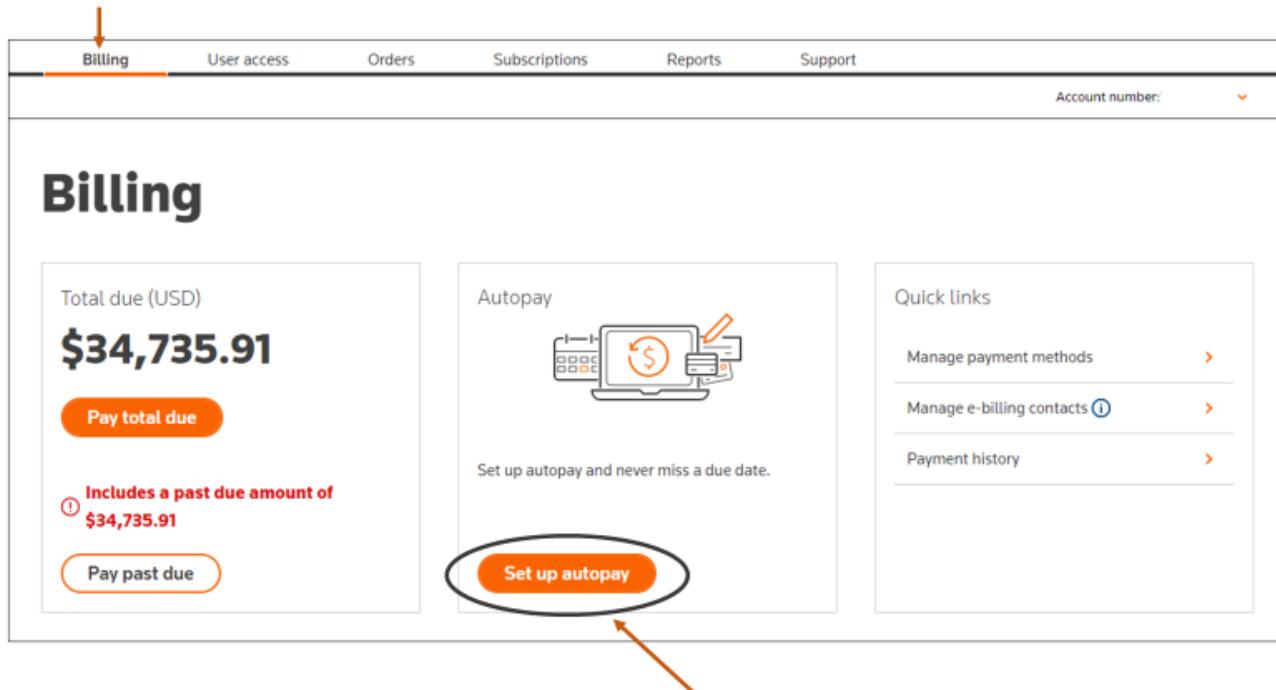
Visa ending in 9121

Next Cancel

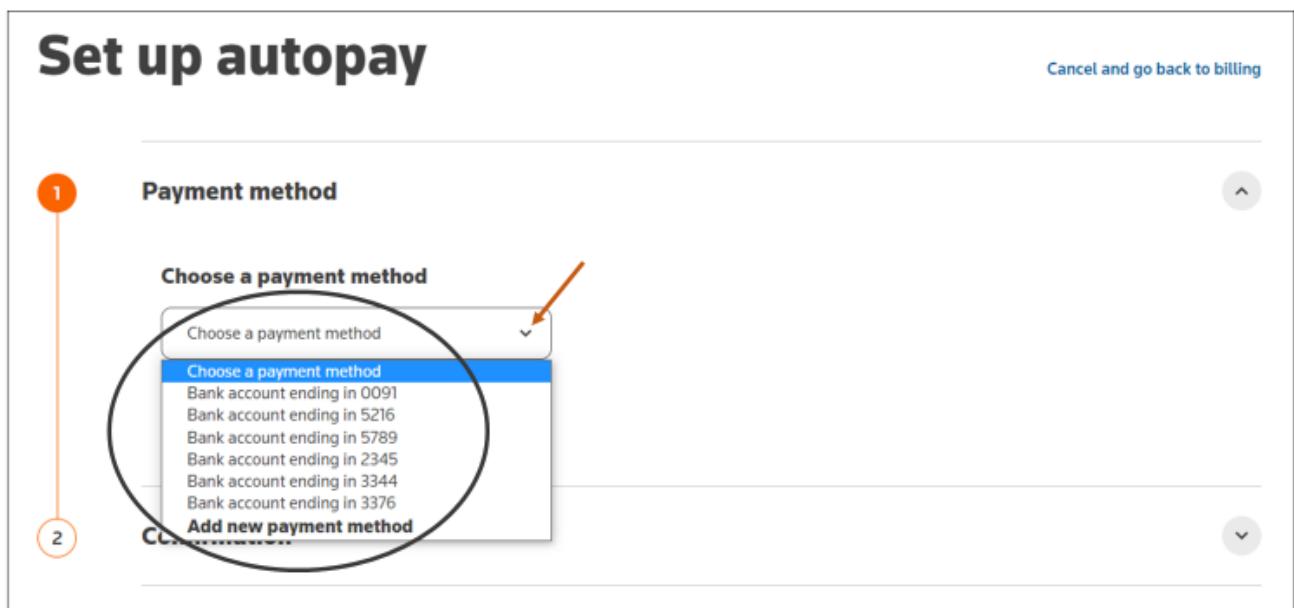
Confirmation

## 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**

**Payment method**

Choose a payment method

Add new payment method

**Bank account ✓** Credit card

All fields required.

Routing number Account number

Enter routing number Enter account number

Routing number Account number

123456789 0012345678900

Next Cancel

**Confirmation**

Cancel and go back to billing

**Set up autopay**

**Payment method**

Choose a payment method

Add new payment method

**Bank account** Credit card

All fields required.

Name on card

Card number

Card logos: MasterCard, VISA, American Express, Discover

Expiration month (MM) Expiration year (YYYY)

Month 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**.

**Confirmation**

When you enable Autopay, your current balance due will be paid immediately. Future payments will be automatically charged to your set payment method on or after the invoice date.

Bank account ending in **5216**

**About Autopay**

Autopay (credit card payment or electronic funds transfer) payments will include any and all charges due West Publishing Corporation ("WEST"). In some cases, as may be indicated in your contract with Thomson Reuters, WEST may act as a billing and collection agent for Thomson Reuters Enterprise Centre GmbH ("TREC"). Autopay payments include all charges that may be past due at the time you sign up for the service.

When you enroll in Autopay, or make any changes to your Autopay account, such updates may not take effect immediately, and your old payment method may apply to your next billing event. All future charges will be charged/withdrawn from your new payment method going forward.

**Authorization for Autopay**

I hereby request and authorize WEST to charge my credit card or to initiate electronic funds transfers (EFTs) from my bank account to pay all charges billed to my account on or after my invoice date, notwithstanding anything in existing agreement(s) with WEST or TREC to the contrary. Such charges may include one-time charges, monthly charges, annual charges, and subscription charges incurred and pursuant to the terms and conditions of existing agreement(s) with WEST or TREC. This authorization will remain in effect until revoked by me in writing and receipt of such notice by WEST. Neither WEST nor TREC assumes any responsibility for any interest, late fees or penalties associated with credit card payments. I agree to indemnify and hold WEST and TREC harmless from any liability or loss occurring due to the dishonor of any debit presented as a result of any charge made or refused to be made under this authorization for Autopay. In no event will either WEST or TREC be liable for exemplary, special or consequential damages arising under this authorization.

**Customer Acknowledgement**

I acknowledge and agree that I am responsible for providing advance notice to Customer Service, by logging into my account to make any changes to credit card or bank account information, including but not limited to name, account number, expiration date, etc. In the event WEST acting on its own or as billing agent for TREC, is unable to charge my credit card or bank account per the terms of this Authorization Form, WEST or TREC may terminate or suspend existing agreement(s) immediately though scheduled payments remain due and payable under any existing agreement(s). This authorization will be effective only upon approval by either WEST or TREC, as applicable.

**Terminating Autopay**

Contact Customer Service by logging into my account regarding terminating your participation in Autopay at any time. Stopping future withdrawals through Autopay does not terminate any existing agreement(s) for products or services. All scheduled monthly payments remain due and payable subsequent to either WEST or TREC, as applicable, approving your request to discontinue Autopay.

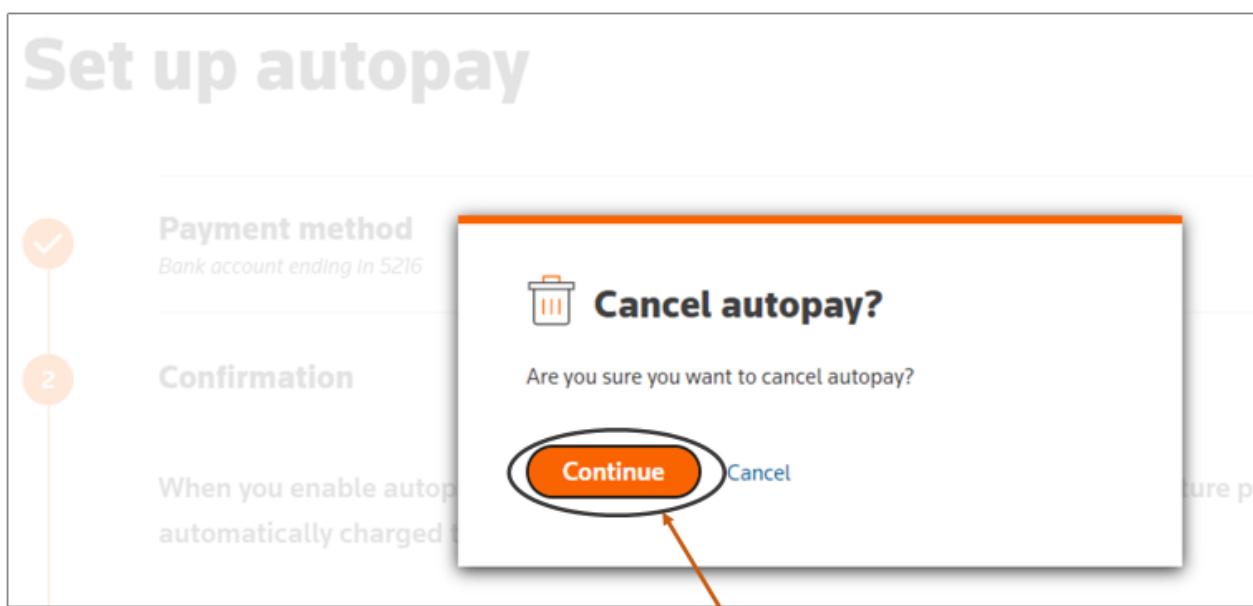
I have read and agree to the Autopay terms and conditions.

**Confirm** **Back**

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.

## Manage autopay

Change your payment method, or [turn off autopay](#).

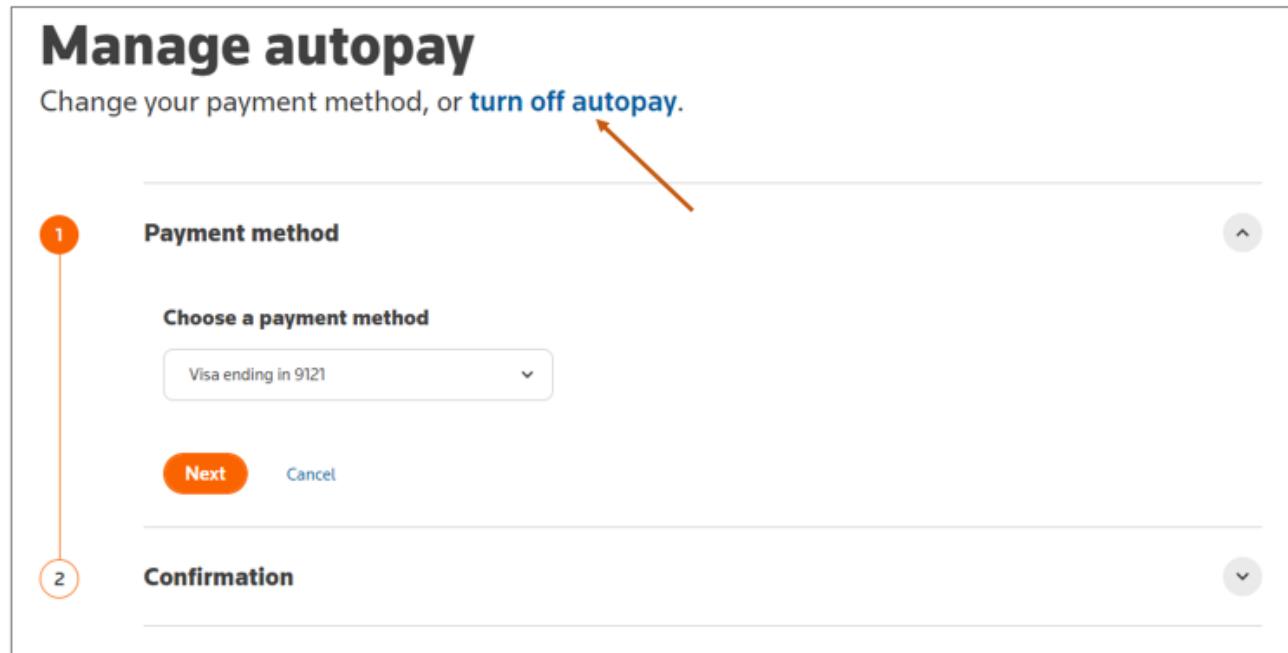
1 **Payment method**

Choose a payment method

Visa ending in 9121

Next Cancel

2 **Confirmation**



Then, click **Turn off**.

## Manage autopay

Change your payment method, or [turn off autopay](#).

1 **Payment method**

Choose a payment method

Visa ending in 9121

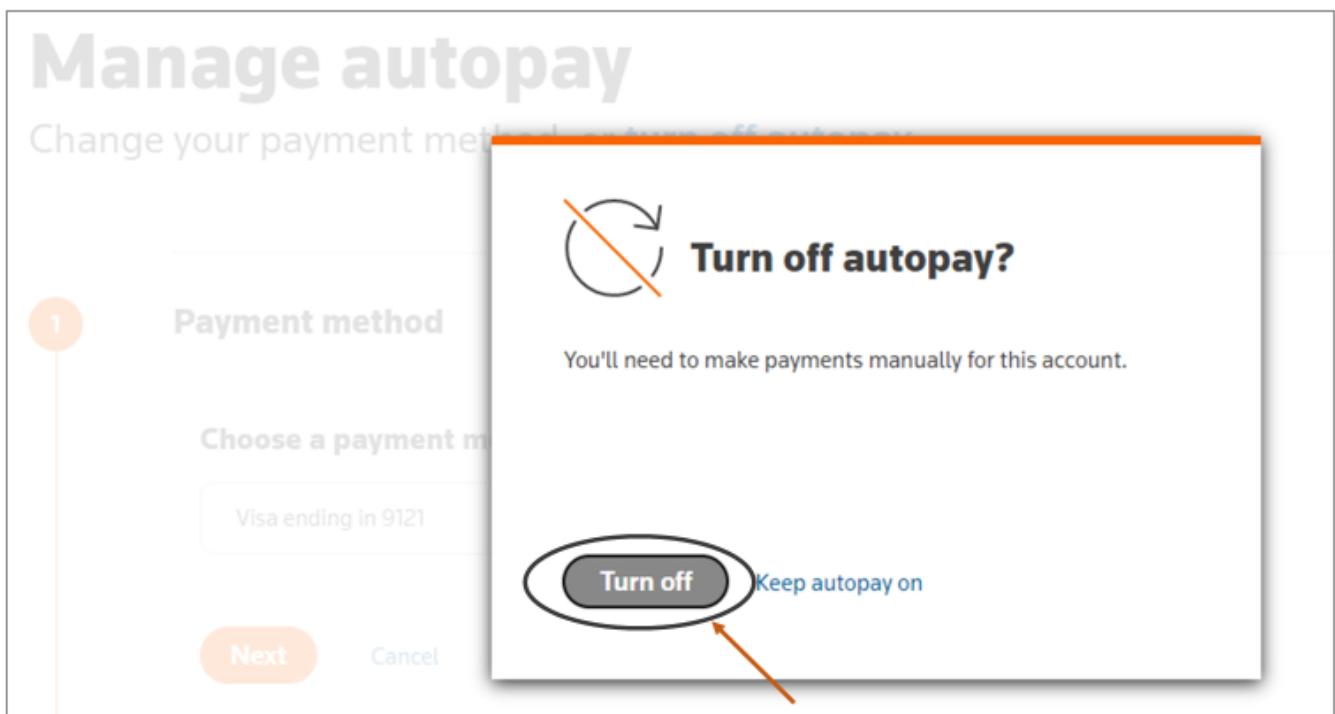
Next Cancel

### Turn off autopay?

You'll need to make payments manually for this account.

**Turn off** [Keep autopay on](#)





## 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**.

**Billing**

Total due (USD)  
**\$34,583.60**

Includes a past due amount of  
\$34,482.90

Pay total due

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	① Past due	<a href="#">Pay invoice</a> <a href="#">View details</a> <a href="#">Download invoice</a> <a href="#">Actions</a>
<input type="checkbox"/> 0844389694	Partial Balance	Dec 07, 2021	May 04, 2021	① Past due	<a href="#">Actions</a>
<input type="checkbox"/> 0845459756	Partial Balance	Jan 24, 2022	Dec 08, 2021	① Past due	\$3,067.88 <a href="#">Actions</a>

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 OPPERMANN DR,  
EAGAN, VT, USA,  
32103

**Report a problem**



<input checked="" type="checkbox"/> <b>A PRACTICAL GUIDE TO PREVENTING LEGAL MALPRACTICE ONE HARDBOUND VOL AND SUPP SUB</b>	Total: <b>\$100.70</b>
<input checked="" type="checkbox"/> <b># LIBRARY MAINTENANCE AGREEMENT SUB</b>	Total: <b>\$34.75</b>
<input checked="" type="checkbox"/> <b># LIBRARY MAINTENANCE AGREEMENT SUB</b>	Total: <b>\$13.05</b>
<input checked="" type="checkbox"/> <b># LIBRARY MAINTENANCE AGREEMENT SUB</b>	Total: <b>\$5.78</b>

Posting date: **Dec 01, 2021** | Posting number: **6145**

Posting date: **Dec 01, 2021** | Posting number: **6145**

Posting date: **Dec 01, 2021** | Posting number: **6145**

Posting date: **Dec 01, 2021** | Posting number: **6145**

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**

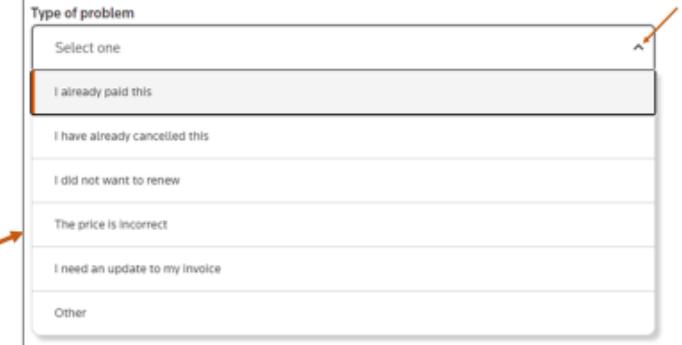
Receive email notifications when an agent comments on your ticket. (Optional)

**Type of problem**  
Select one

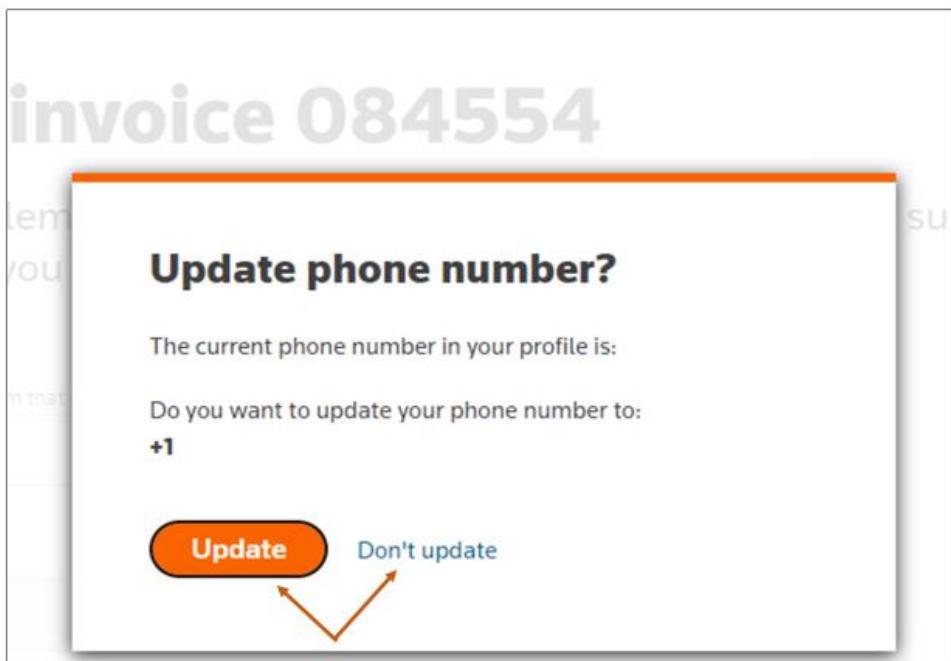
**Description**  
Share the details of the problem so that we can assign your ticket to the right service representative.

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

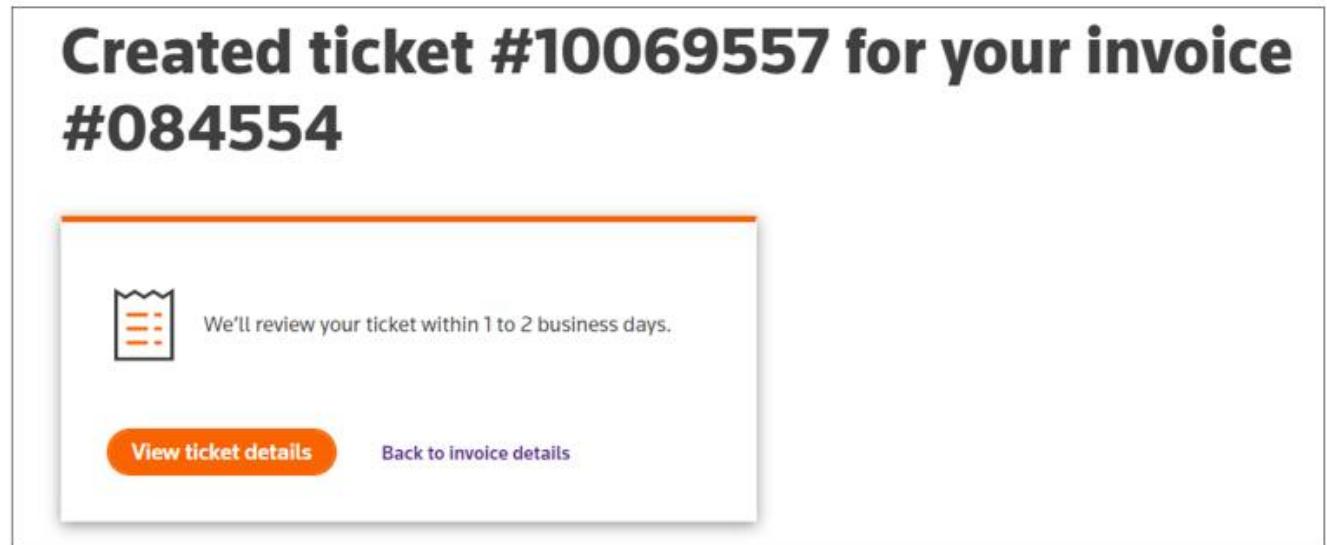
**Submit** 



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

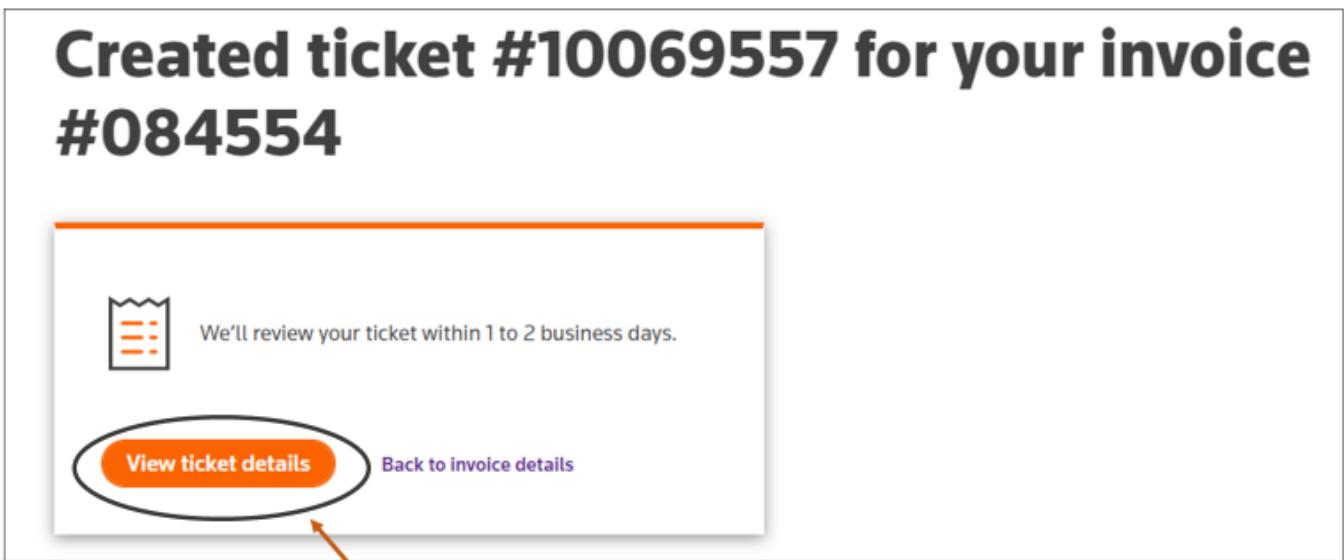


Next, you will see a confirmation box acknowledging that your ticket was submitted.



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.

**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](#)

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?

**Send**

## Attach files to your message (Optional)

Drop files to upload



Choose files

7 MB limit per upload



### 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.

**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.

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**

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				<a href="#">Export payment history to file</a>
Payment date	Invoice number	Payment method	Amount (USD)	
May 20, 2022	0844876642	Bank account XXXXXX0137	\$154.28	
Apr 11, 2022	0844389694	Visa ending in 5861	\$5.78	*Partial payment
Mar 28, 2022	0845728929	Bank account XXXXXX0137	\$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.

The screenshot shows the Thomson Reuters Self-Service Portal interface. At the top, there is a navigation bar with tabs: Billing (which is highlighted with an orange arrow), User access, Orders, Subscriptions, Reports, and Support. Below the navigation bar, there is a text input field for 'Account number:'.

The main content area is titled 'Billing'. It displays the following information:

- Total due (USD): **\$34,583.60**
- Pay total due** button
- Includes a past due amount of \$34,583.60** (indicated by a red note)
- Pay past due** button
- Autopay** section with an icon of a laptop and a credit card, and the text: 'Set up autopay and never miss a due date.' A **Set up autopay** button is present.
- Quick links** sidebar on the right, which includes:
  - Manage payment methods** (this link is circled with an orange oval and has an orange arrow pointing to it)
  - Manage e-billing contacts**
  - Payment history**

## Add a Payment Method

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

The screenshot shows the 'Manage payment methods' page. At the top, there is a heading 'Manage payment methods' with a sub-instruction: 'View and update your payment methods. Select **Add payment method** to add a bank account or credit card to your account.' Below this, there is an 'Add payment method' button, which is highlighted with a black oval and an arrow pointing to it from the left. The page displays a grid of six bank account entries, each with a 'Bank account' icon, the account number, and a 'Delete' button. The account numbers listed are 0091, 5216, 5789, 2345, 3344, and 3376.

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

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

**Manage payment methods**

**Add your payment method**

**Bank account**  **Credit card**

**Routing number**  **Account number**

**Routing number**  **Account number**

**Add** **Cancel**

**Add your payment method**

**Credit card**  **Bank account**

**Name on card**  **Card number**

**Expiration month (MM)**  **Expiration year (YY)**   
Month  Year

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

**Add** **Cancel**

## Save a Payment Method

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

**Make a payment**

**1 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

Save payment method

Next Cancel

**2 Confirmation**

**Make a payment**

**1 Payment method**

Add new payment method

Bank account  Credit card

All fields required.

Name on card

Card number

MasterCard VISA American Express

Expiration month (MM)      Expiration year (YYYY)

Month Year

Security code

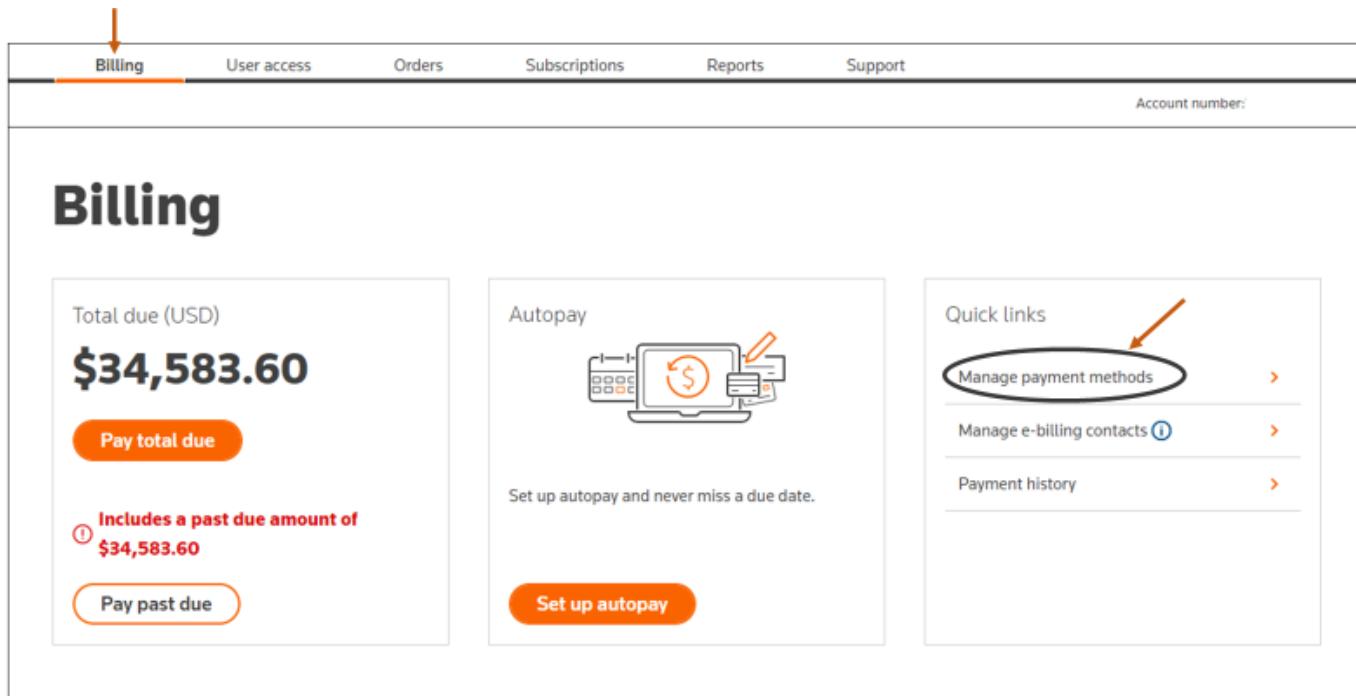
3 or 4 digit code on the back or front of card

Save payment method

Next Cancel

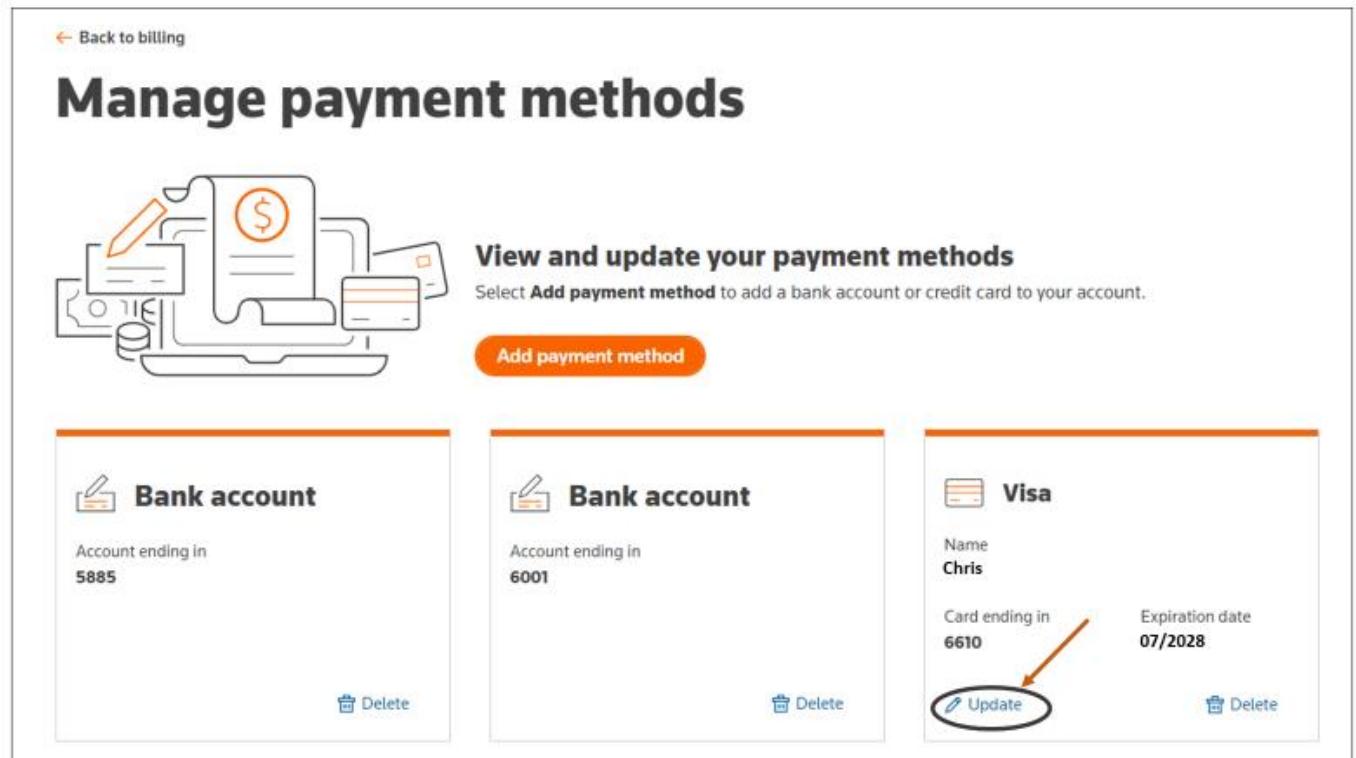
## Edit a Payment Method

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



The screenshot shows the 'Billing' tab selected in the top navigation bar. The 'Manage payment methods' link is circled with a red arrow in the 'Quick links' sidebar on the right.

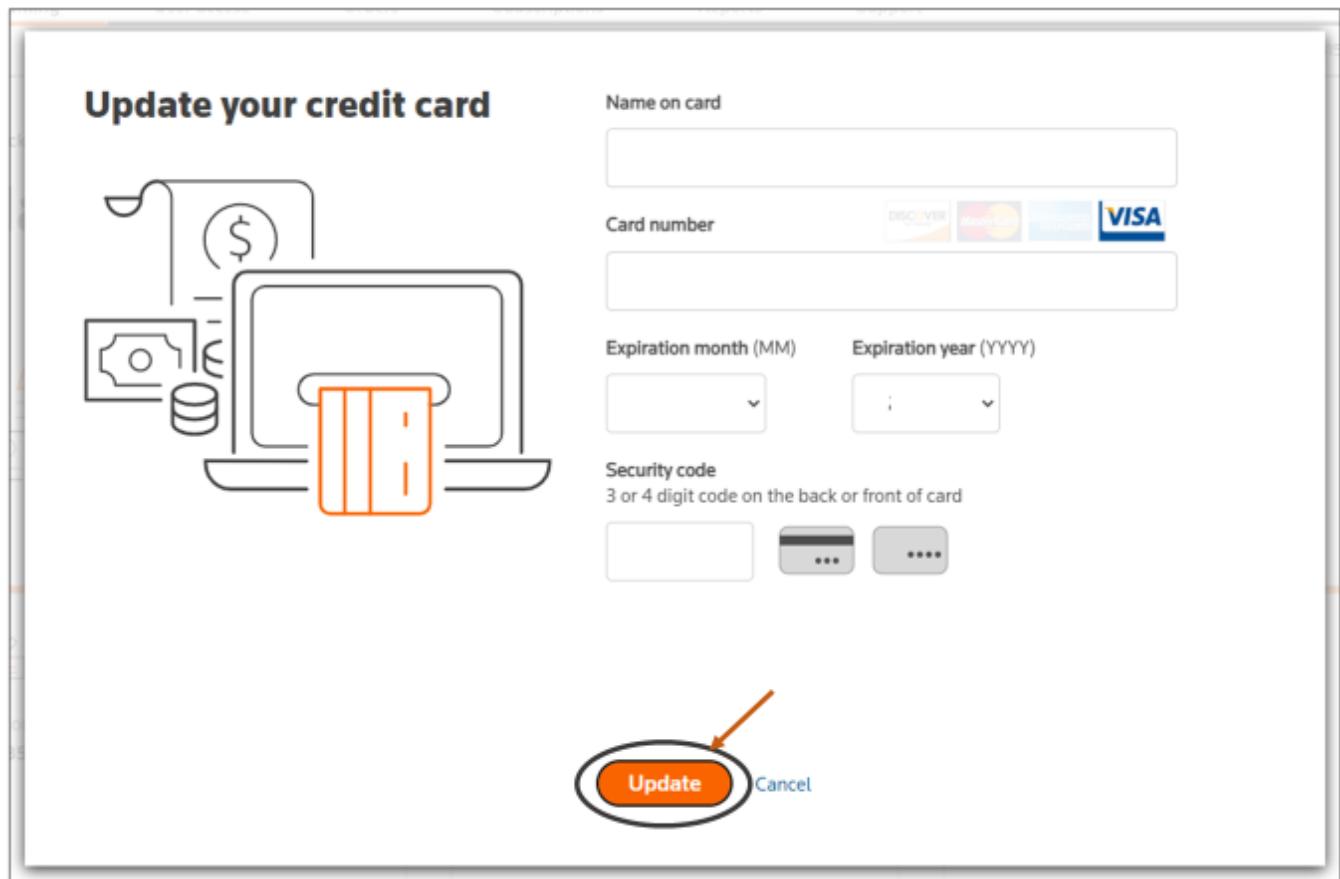
Next, click **Update** at the bottom left of the payment method you want to update.



The screenshot shows the 'Manage payment methods' page. The 'Visa' card is selected, and the 'Update' button is circled with a red arrow.

Payment Method Type	Account/Card Details	Action
Bank account	Account ending in 5885	Delete
Bank account	Account ending in 6001	Delete
Visa	Name: Chris, Card ending in 6610, Expiration date: 07/2028	Update  Delete

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



**Update your credit card**



Name on card

Card number

Card logos: **DISCOVER** **MasterCard** **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.

The screenshot shows the Thomson Reuters Self-Service Portal. At the top, there is a navigation bar with tabs: Billing (which is highlighted with a red arrow), User access, Orders, Subscriptions, Reports, and Support. Below the navigation bar, there is a text input field for 'Account number:' followed by a 'Billing' section title. The 'Billing' section contains the following information:

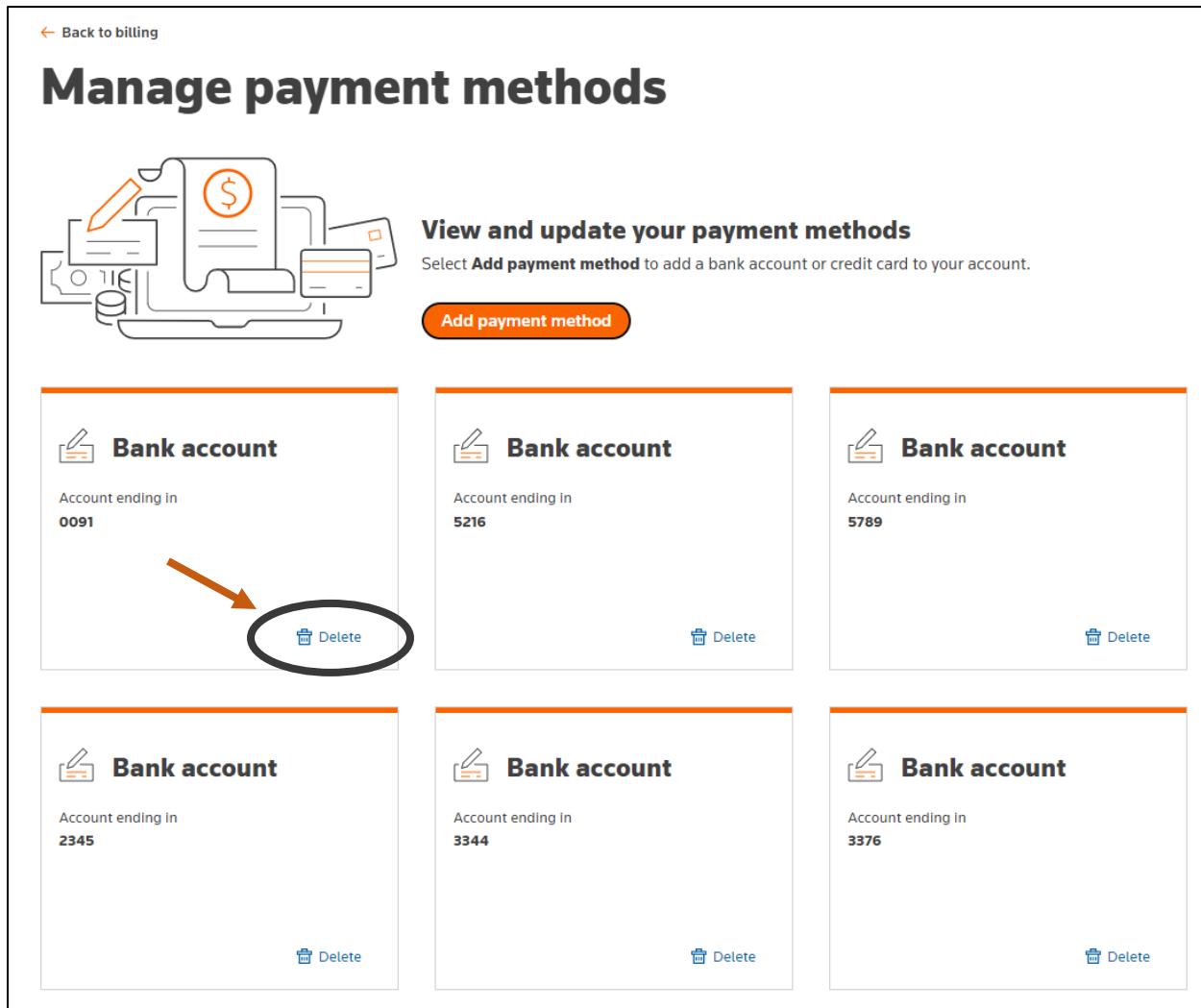
- Total due (USD)**: **\$34,583.60**
- Pay total due** button
- Includes a past due amount of \$34,583.60** (with a red info icon)
- Pay past due** button

Below this, there is a **Autopay** section with an icon of a laptop and a credit card, and the text: "Set up autopay and never miss a due date." It includes a **Set up autopay** button.

On the right, there is a **Quick links** sidebar with the following options:

- Manage payment methods** (circled with a red oval and an arrow pointing to it)
- Manage e-billing contacts** (with a red info icon)
- Payment history**

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



[← Back to billing](#)

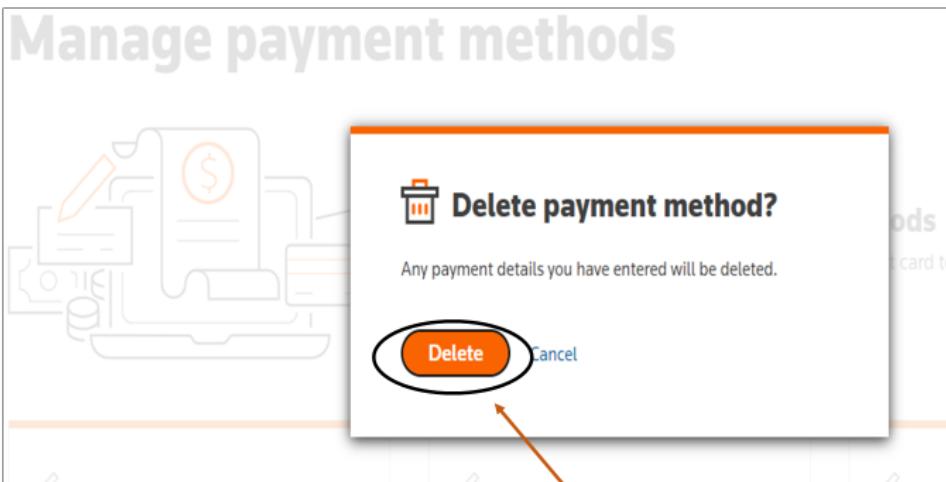
## Manage payment methods

 **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	Bank account	Bank account
 Account ending in <b>0091</b>   Delete	 Account ending in <b>5216</b>   Delete	 Account ending in <b>5789</b>   Delete
 Account ending in <b>2345</b>   Delete	 Account ending in <b>3344</b>   Delete	 Account ending in <b>3376</b>   Delete

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



**Manage payment methods**



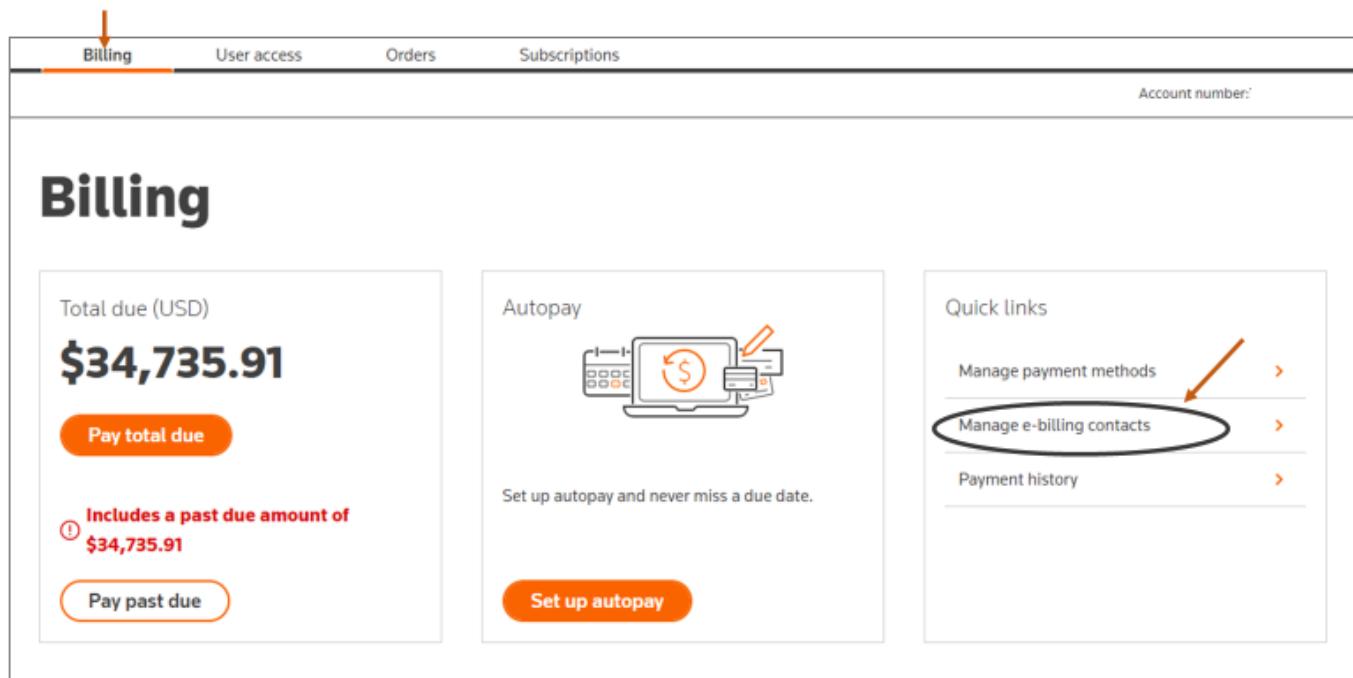
**Delete payment method?**

Any payment details you have entered will be deleted.

 Delete  Cancel

## Manage e-Billing Contacts

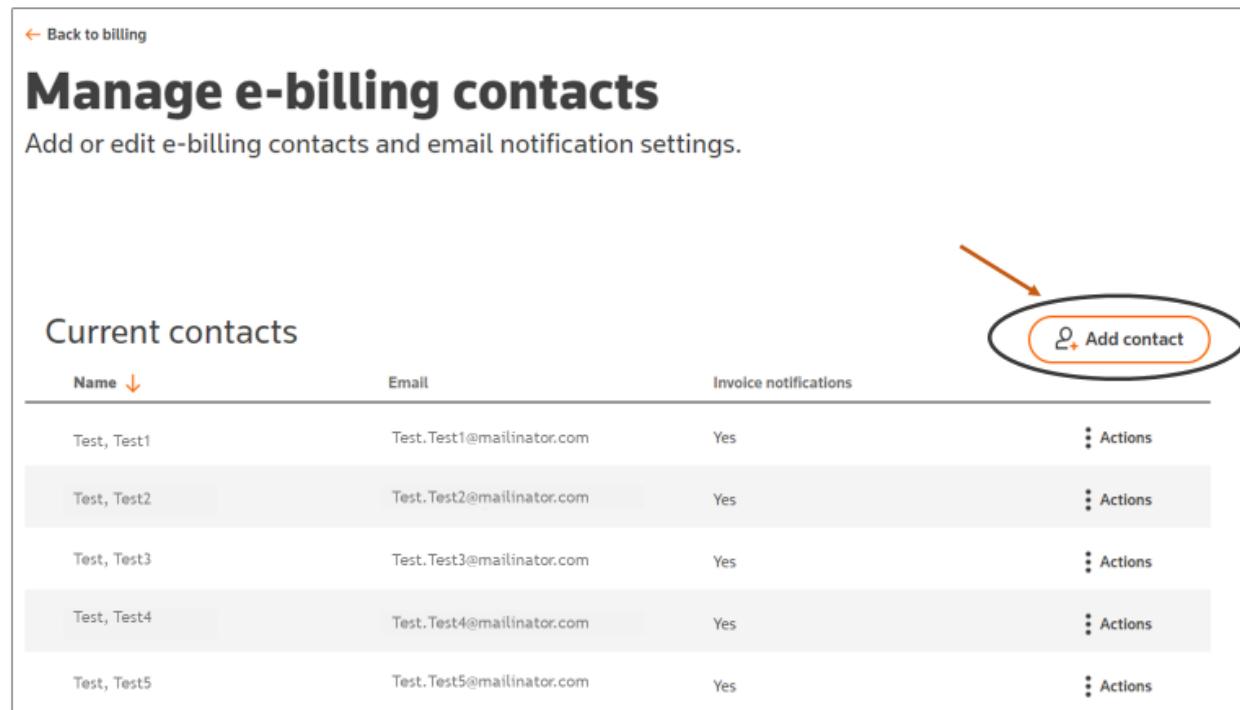
Navigate to the **Billing** tab and select **Manage e-billing contacts**.



The screenshot shows the 'Billing' tab selected in the top navigation bar. The main content area displays a total due of \$34,735.91, with an option to 'Pay total due'. Below this, a note indicates a past due amount of \$34,735.91, with an option to 'Pay past due'. To the right, there is a 'Autopay' section with an icon of a laptop and a credit card, and a 'Quick links' sidebar. The 'Manage e-billing contacts' link in the sidebar is circled in black and has an orange arrow pointing to it from the top right.

### Add an e-Billing Contact

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



The screenshot shows the 'Manage e-billing contacts' page. At the top, there is a 'Back to billing' link. Below it, the title 'Manage e-billing contacts' is displayed, followed by the sub-instruction 'Add or edit e-billing contacts and email notification settings.' The main area is titled 'Current contacts' and lists five entries: 'Test, Test1' (Email: Test.Test1@mailinator.com, Invoice notifications: Yes), 'Test, Test2' (Email: Test.Test2@mailinator.com, Invoice notifications: Yes), 'Test, Test3' (Email: Test.Test3@mailinator.com, Invoice notifications: Yes), 'Test, Test4' (Email: Test.Test4@mailinator.com, Invoice notifications: Yes), and 'Test, Test5' (Email: Test.Test5@mailinator.com, Invoice notifications: Yes). Each entry has an 'Actions' button. In the bottom right corner of the page, there is a large orange 'Add contact' button, which is circled in black and has an orange arrow pointing to it from the top right.

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

[← Back to manage e-billing contacts](#)

## Add contacts

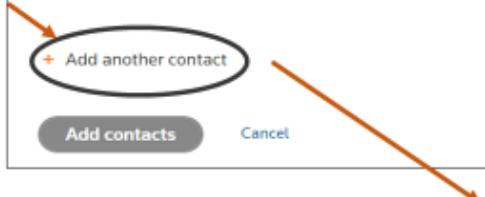
Enter contact information

 Contact 1:

First name	Last name	Email
<input type="text" value="Enter first name"/>	<input type="text" value="Enter last name"/>	<input type="text" value="Enter 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
<input type="text" value="Enter first name"/>	<input type="text" value="Enter last name"/>	<input type="text" value="Enter email"/>

[+ Add another contact](#)

**Add contacts** [Cancel](#)

[← Back to manage e-billing contacts](#)

## Add contacts

Enter contact information

 Contact 2:

First name	Last name	Email
<input type="text" value="Enter first name"/>	<input type="text" value="Enter last name"/>	<input type="text" value="Enter email"/>

[+ Add another contact](#)

**Add contacts** [Cancel](#)



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

# Contacts added



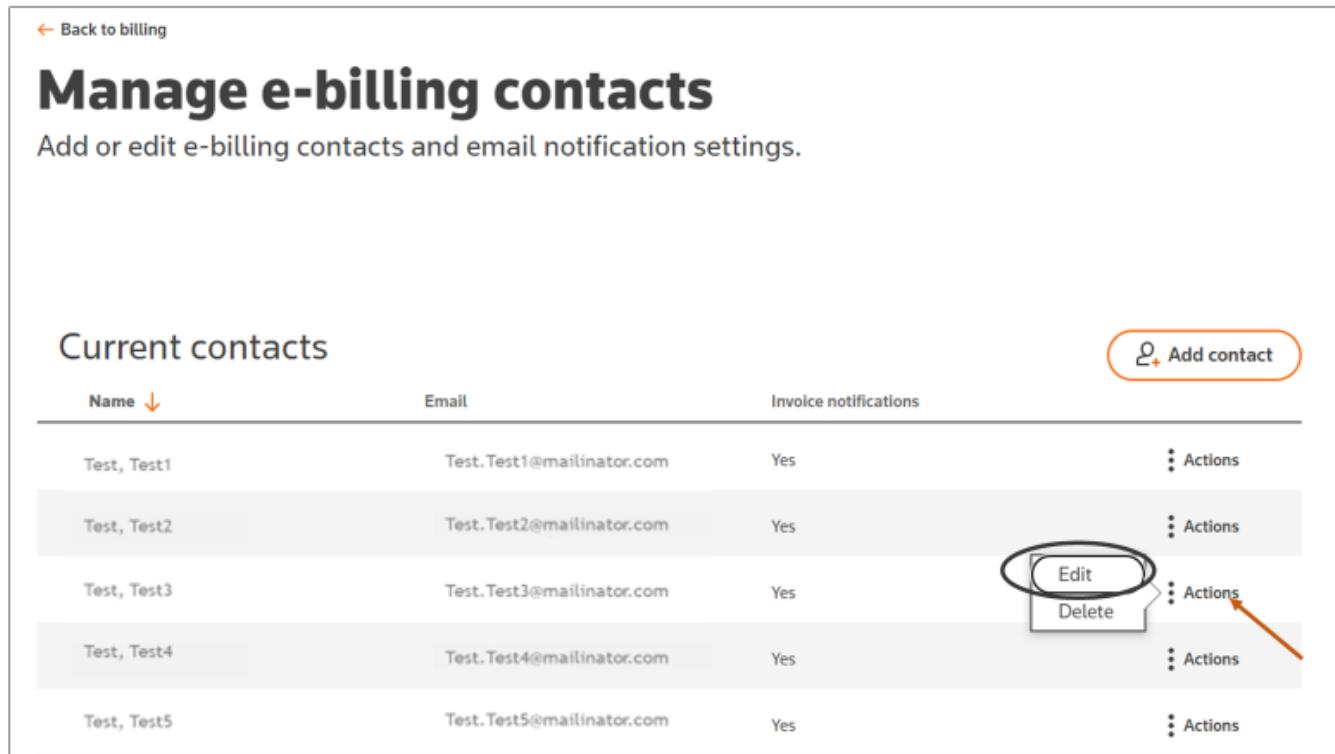
We've added these contacts to receive e-billing notifications:

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

Name	Email	Invoice notifications	Actions
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

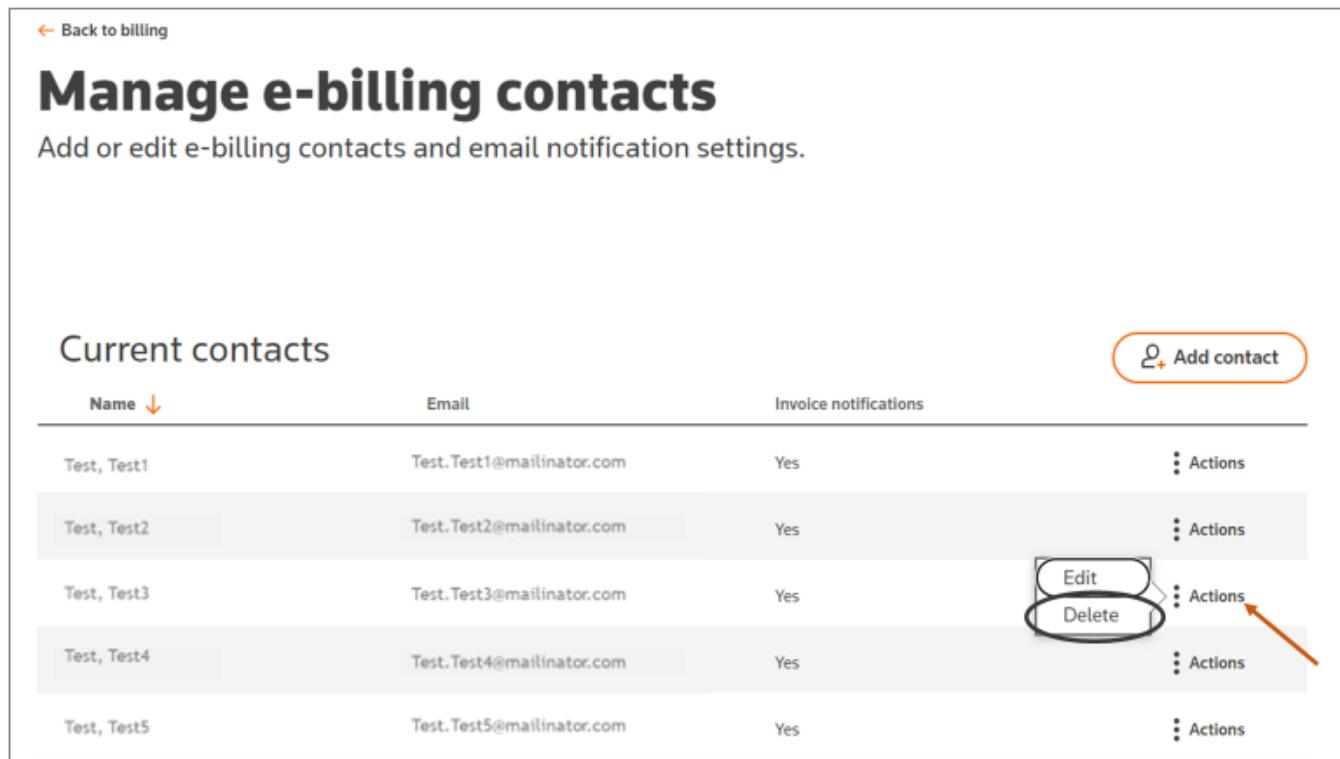
Last name

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

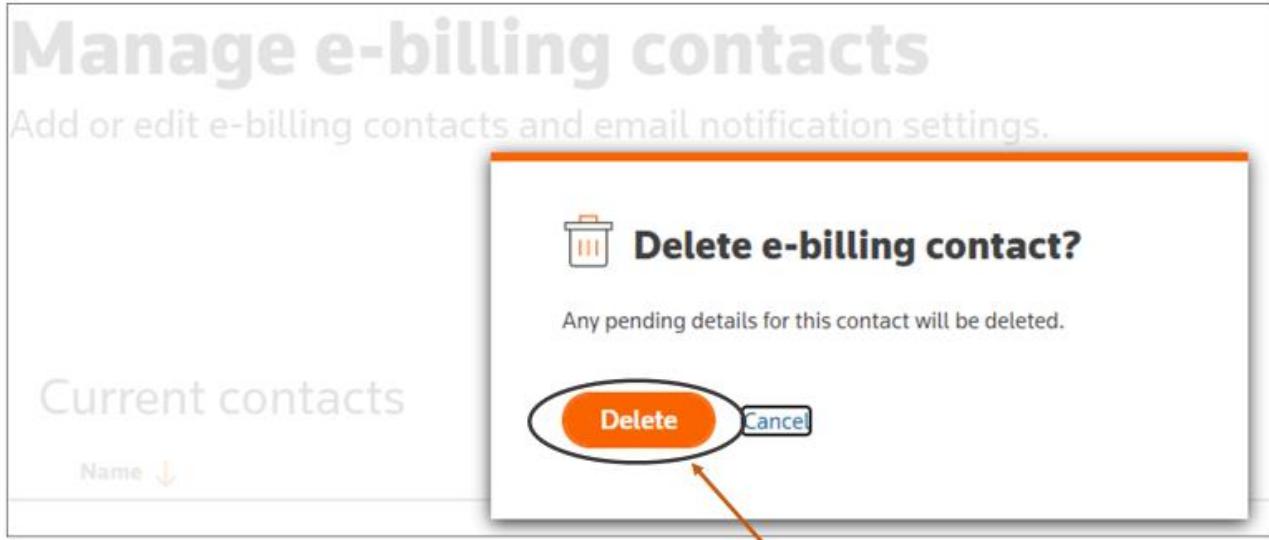
Add or edit e-billing contacts and email notification settings.

### Current contacts

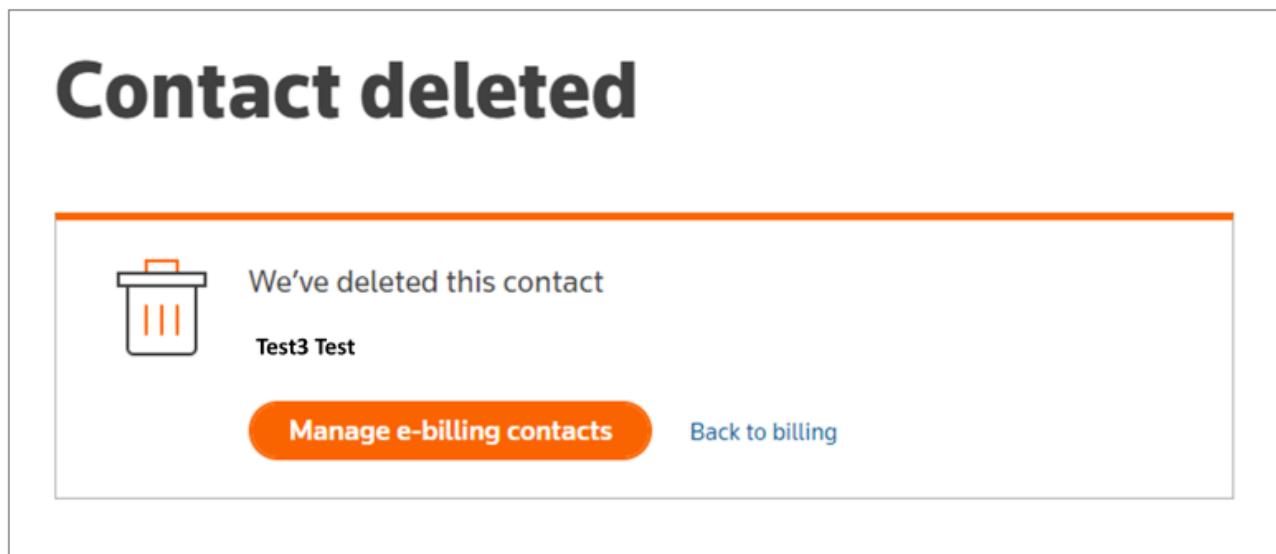
Name	Email	Invoice notifications	Actions
Test, Test1	Test.Test1@mailinator.com	Yes	⋮ Actions
Test, Test2	Test.Test2@mailinator.com	Yes	⋮ Actions
Test, Test3	Test.Test3@mailinator.com	Yes	⋮ Actions
Test, Test4	Test.Test4@mailinator.com	Yes	⋮ Actions
Test, Test5	Test.Test5@mailinator.com	Yes	⋮ Actions

**Add contact**

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



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

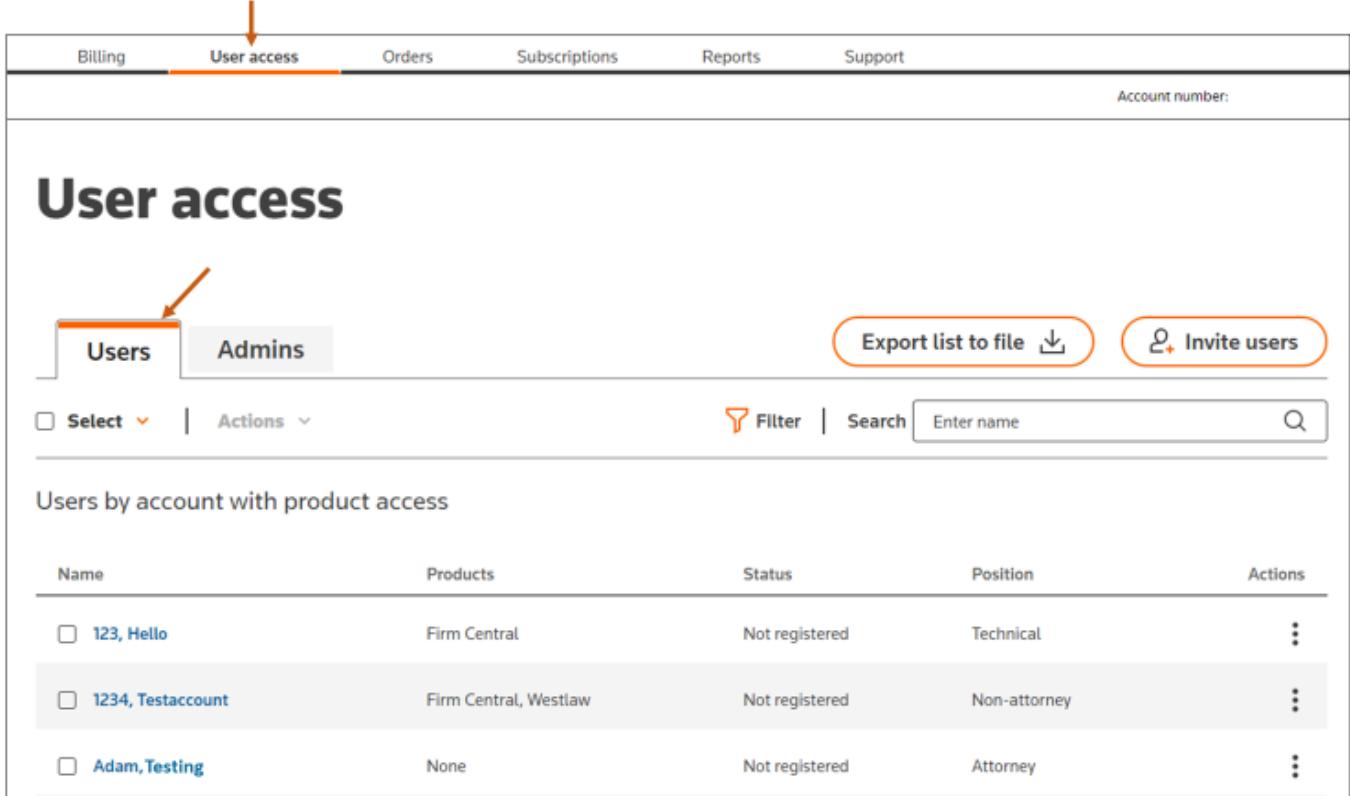


## USER MANAGEMENT TASKS

### 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' page with the 'Users' tab selected. The 'Users' tab is highlighted with an orange border and has an orange arrow pointing to it. The 'Admins' tab is unselected. At the top, there are tabs for Billing, User access (selected), Orders, Subscriptions, Reports, and Support. An 'Account number:' input field is also present. Below the tabs, the title 'User access' is displayed. On the left, there are buttons for 'Select' (with a dropdown arrow) and 'Actions' (with a dropdown arrow). On the right, there are buttons for 'Export list to file' (with a download icon) and 'Invite users' (with a plus icon and a user icon). Below these buttons is a 'Filter' icon and a 'Search' input field with the placeholder 'Enter name' and a magnifying glass icon. The main content area is titled 'Users by account with product access' and contains a table with three rows of data. The table columns are: Name, Products, Status, Position, and Actions (with a three-dot menu icon). The data rows are:

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

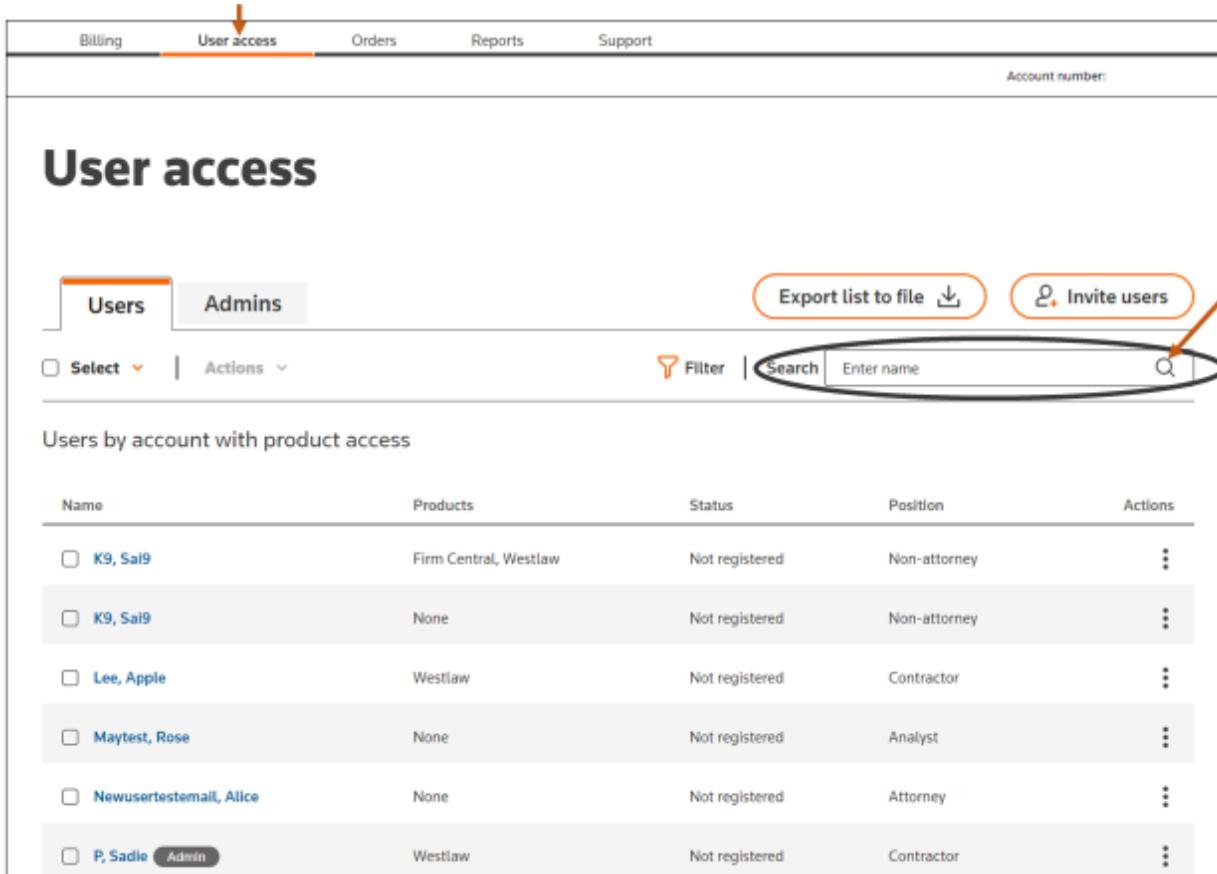
To view Administrators (users with administrative access), navigate to the **User access** tab and click on the **Admins** tab.

The screenshot shows the 'User access' page. At the top, there is a navigation bar with tabs: Billing, **User access** (which is highlighted with a red arrow), Orders, Reports, and Support. Below the navigation bar is a search bar with the placeholder 'Account number:'. The main title 'User access' is displayed in a large, bold, dark font. Below the title, there are two buttons: 'Users' (gray) and 'Admins' (orange, highlighted with a red arrow). To the right of these buttons is a button labeled 'Invite users' with a user icon. Below the buttons is a search bar with the placeholder 'Enter name' and a magnifying glass icon. The main content area is a table with the following columns: Name, Permissions, Status, and Actions. The table contains 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.



**User access**

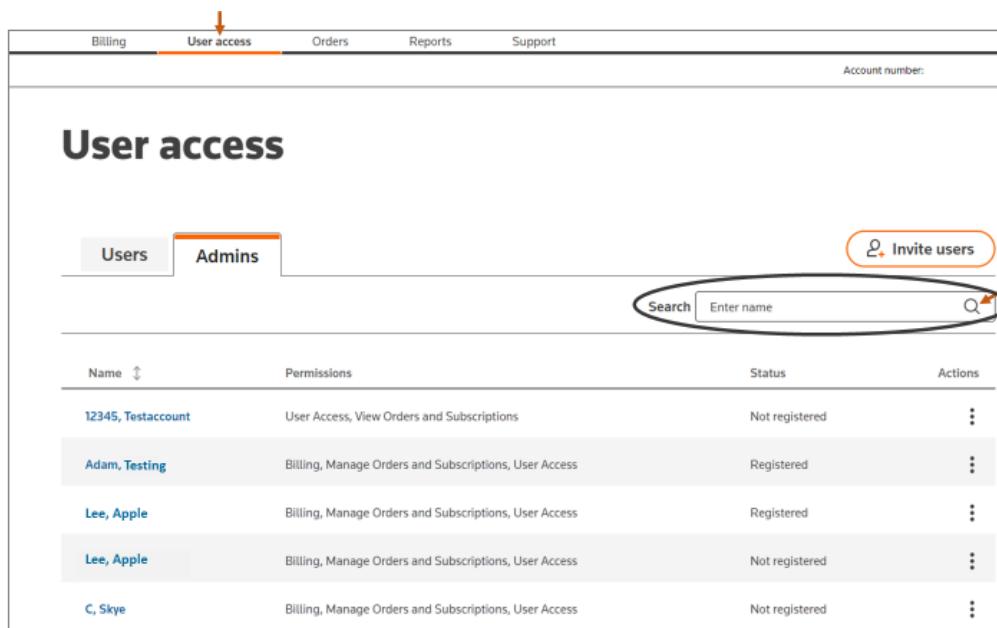
**Users** **Admins**

**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"/> <b>K9, Sai9</b>	Firm Central, Westlaw	Not registered	Non-attorney	⋮
<input type="checkbox"/> <b>K9, Sai9</b>	None	Not registered	Non-attorney	⋮
<input type="checkbox"/> <b>Lee, Apple</b>	Westlaw	Not registered	Contractor	⋮
<input type="checkbox"/> <b>Maytest, Rose</b>	None	Not registered	Analyst	⋮
<input type="checkbox"/> <b>Newuserstestemail, Alice</b>	None	Not registered	Attorney	⋮
<input type="checkbox"/> <b>P, Sadie</b> <b>Admin</b>	Westlaw	Not registered	Contractor	⋮



**User access**

**Users** **Admins**

**Invite users**

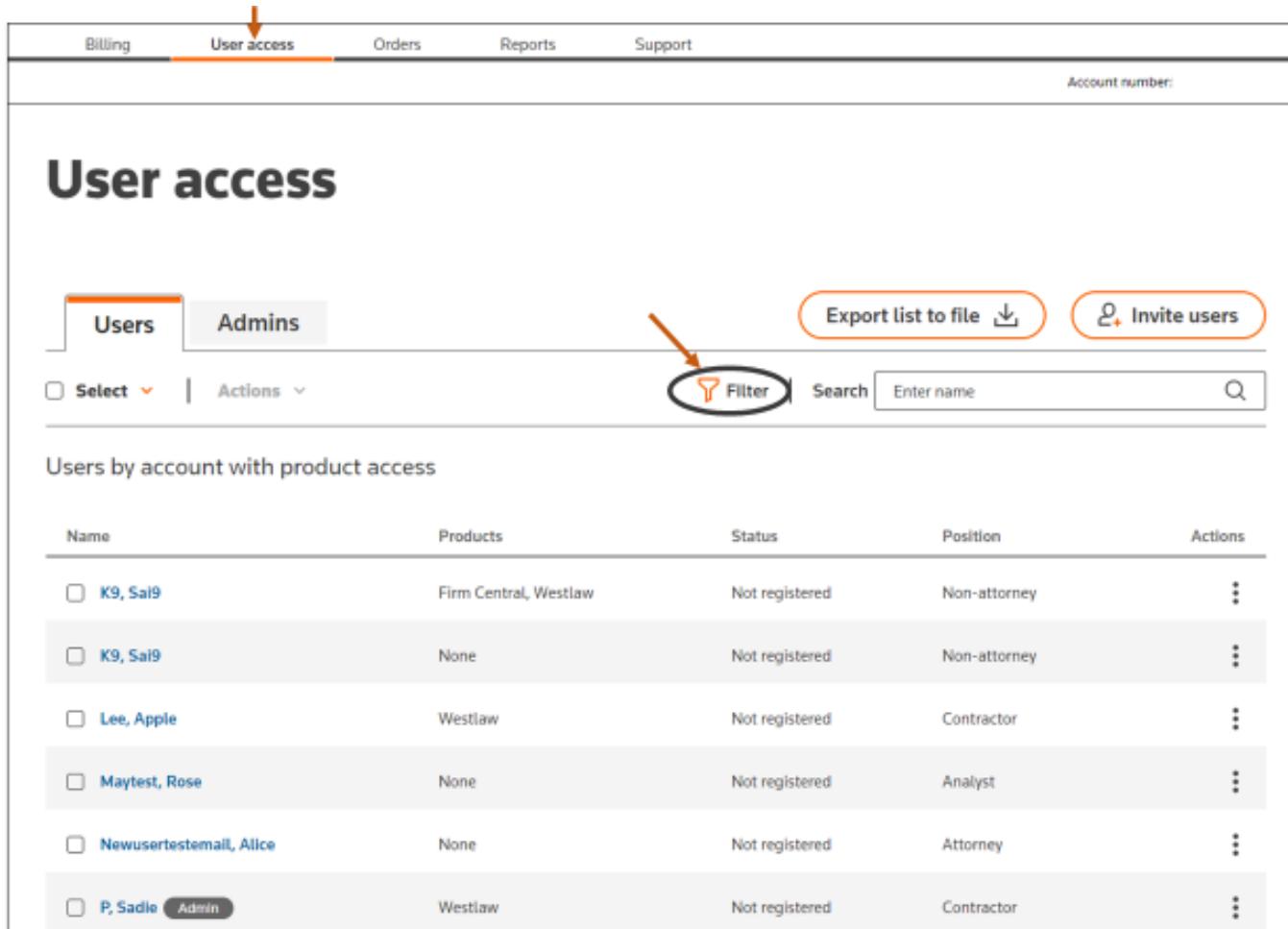
**Search** **Enter name**

**Name** **Permissions** **Status** **Actions**

<b>12345, Testaccount</b>	User Access, View Orders and Subscriptions	Not registered	⋮
<b>Adam, Testing</b>	Billing, Manage Orders and Subscriptions, User Access	Registered	⋮
<b>Lee, Apple</b>	Billing, Manage Orders and Subscriptions, User Access	Registered	⋮
<b>Lee, Apple</b>	Billing, Manage Orders and Subscriptions, User Access	Not registered	⋮
<b>C, Skye</b>	Billing, Manage Orders and Subscriptions, User Access	Not registered	⋮

## Filter Users

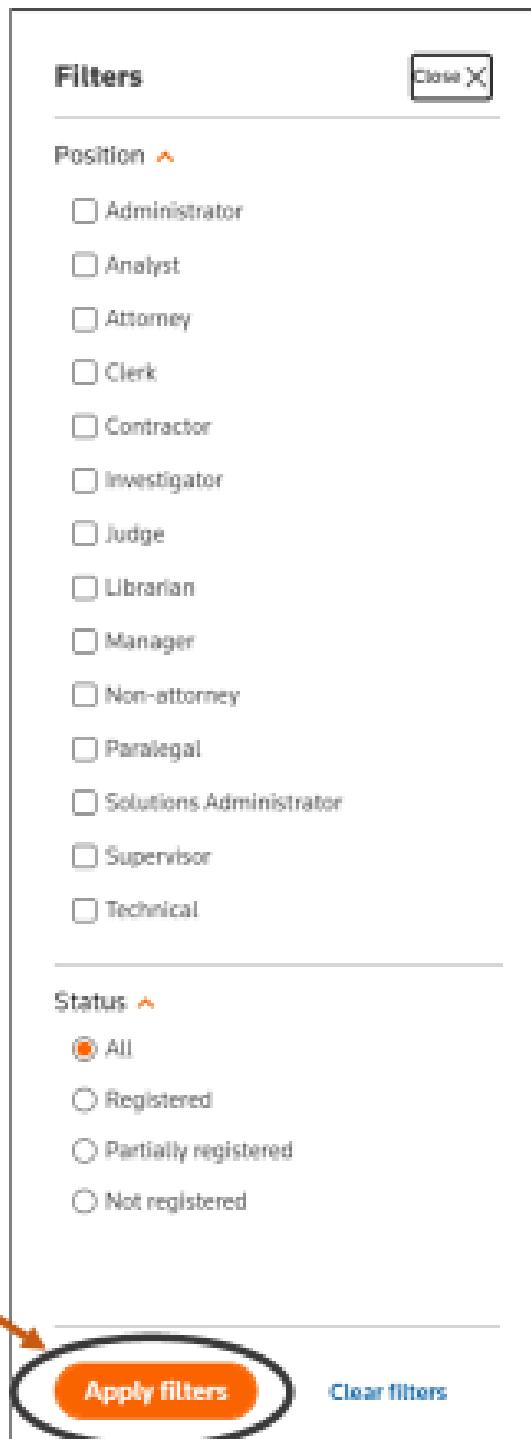
Navigate to the **User access** tab. Next, from the **Users** tab, click **Filter** to the left of the Search bar.



The screenshot shows the 'User access' page. At the top, there is a navigation bar with tabs: Billing, User access (which is highlighted with a red arrow), Orders, Reports, and Support. Below the navigation bar is a search bar with the placeholder 'Account number:'. The main title 'User access' is displayed in a large, bold font. Below the title, there are two tabs: 'Users' (which is selected and highlighted with a red arrow) and 'Admins'. To the right of these tabs are two buttons: 'Export list to file' with a download icon and 'Invite users' with a plus icon. Below the tabs, there are two dropdown menus: 'Select' and 'Actions'. To the right of these menus is a search bar with the placeholder 'Enter name' and a magnifying glass icon. Below the search bar is a 'Filter' button, which is also highlighted with a red arrow. 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"/> 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 <span>Admin</span>	Westlaw	Not registered	Contractor	⋮

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



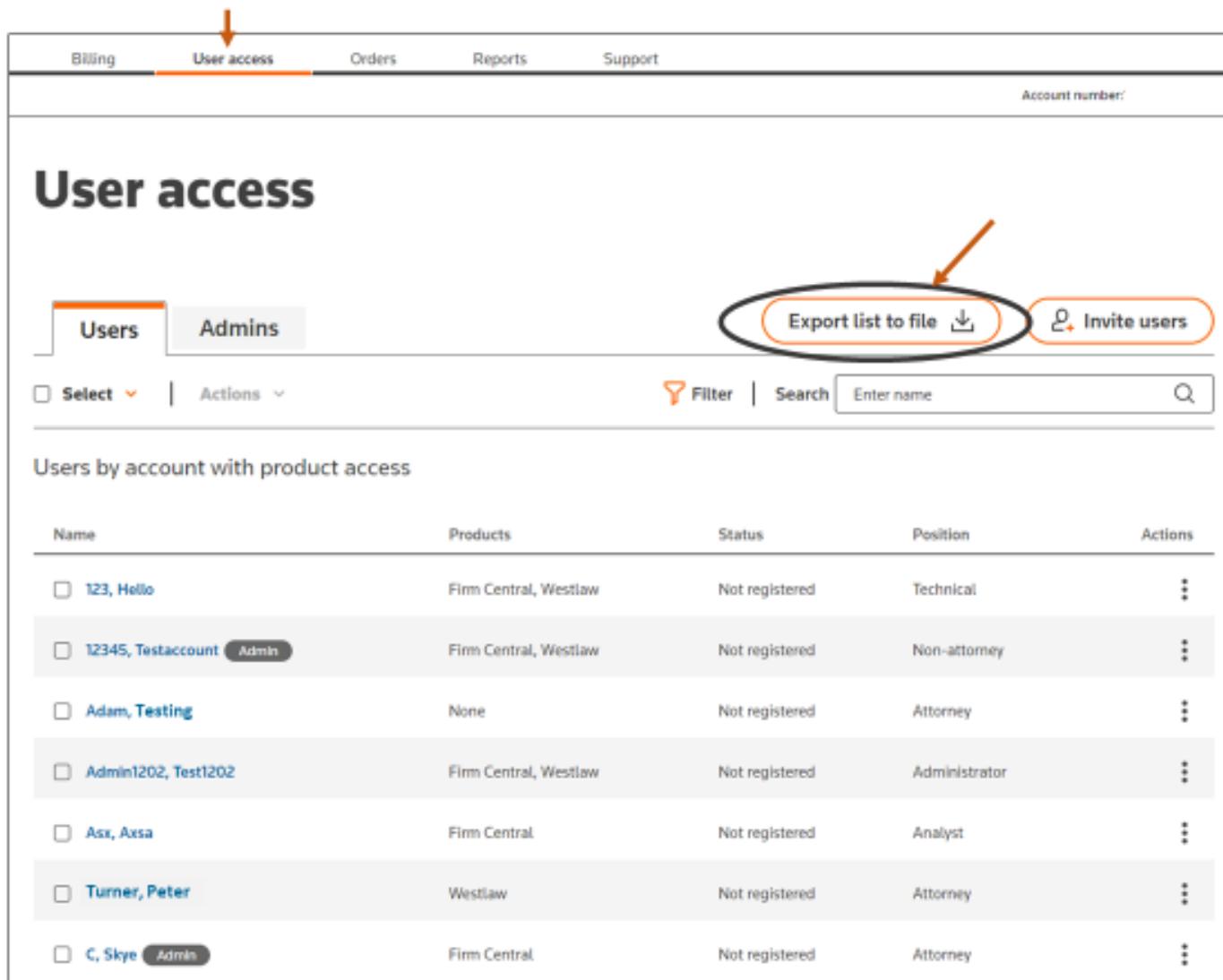
The **Users** list will now display only the filtered results, and the number of selected filters will display in parenthesis next to the **Filter** button.

The screenshot shows the 'User access' page with the 'User access' tab selected. The top navigation bar includes 'Billing', 'User access', 'Orders', 'Reports', and 'Support'. A search bar for 'Account number:' is also present. Below the navigation is a section titled 'User access' with tabs for 'Users' (selected) and 'Admins'. On the right are buttons for 'Export list to file' and 'Invite users'. Below these are filters for 'Select' and 'Actions', and a search bar with placeholder 'Enter name'. A large orange arrow points from the text 'The Users list will now display only the filtered results...' to the 'Filter(2)' button, which is highlighted with a red box. A large black circle highlights the list of users. The user list table has columns: Name, Products, Status, Position, and Actions. The data is as follows:

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 <small>Admin</small>	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**.



The screenshot shows the 'User access' tab selected in the navigation bar. Below the navigation bar, there is a search bar labeled 'Account number:'. The main area is titled 'User access' and contains two tabs: 'Users' (selected) and 'Admins'. Below these tabs are buttons for 'Select' (with a dropdown arrow), 'Actions' (with a dropdown arrow), 'Filter' (with a magnifying glass icon), 'Search' (with a search bar and placeholder 'Enter name'), and a magnifying glass icon. To the right of these buttons are two orange buttons: 'Export list to file' (with a download icon) and 'Invite users' (with a user icon). The main content area is titled 'Users by account with product access' and displays a table of user data. The table has columns: Name, Products, Status, Position, and Actions. Each row contains a checkbox, the user's name, their products (e.g., 'Firm Central, Westlaw'), their status ('Not registered'), their position (e.g., 'Technical'), and an 'Actions' column with a three-dot menu icon. The users listed are: 123, Hello; 12345, Testaccount (Admin); Adam, Testing; Admin1202, Test1202; Asx, Asxa; Turner, Peter; and C, Skye (Admin).

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

The screenshot shows the 'User access' section of the portal. At the top, there are navigation links: Billing, User access (which is highlighted in orange), Orders, Reports, and Support. Below the navigation is a search bar with the placeholder 'Account number:'. The main title 'User access' is displayed in a large, bold font. Below the title, there are two tabs: 'Users' (selected) and 'Admins'. To the right of these tabs are three buttons: 'Export list to file' with a download icon, 'Invite users' with a plus icon, and 'Filter(2)' with a magnifying glass icon. Below these buttons are two dropdown menus: 'Select' and 'Actions'. To the right of these dropdowns are a 'Search' bar and a 'Enter name' input field with a magnifying glass icon. The main content area is titled 'Users by account with product access' and contains a table with the following data:

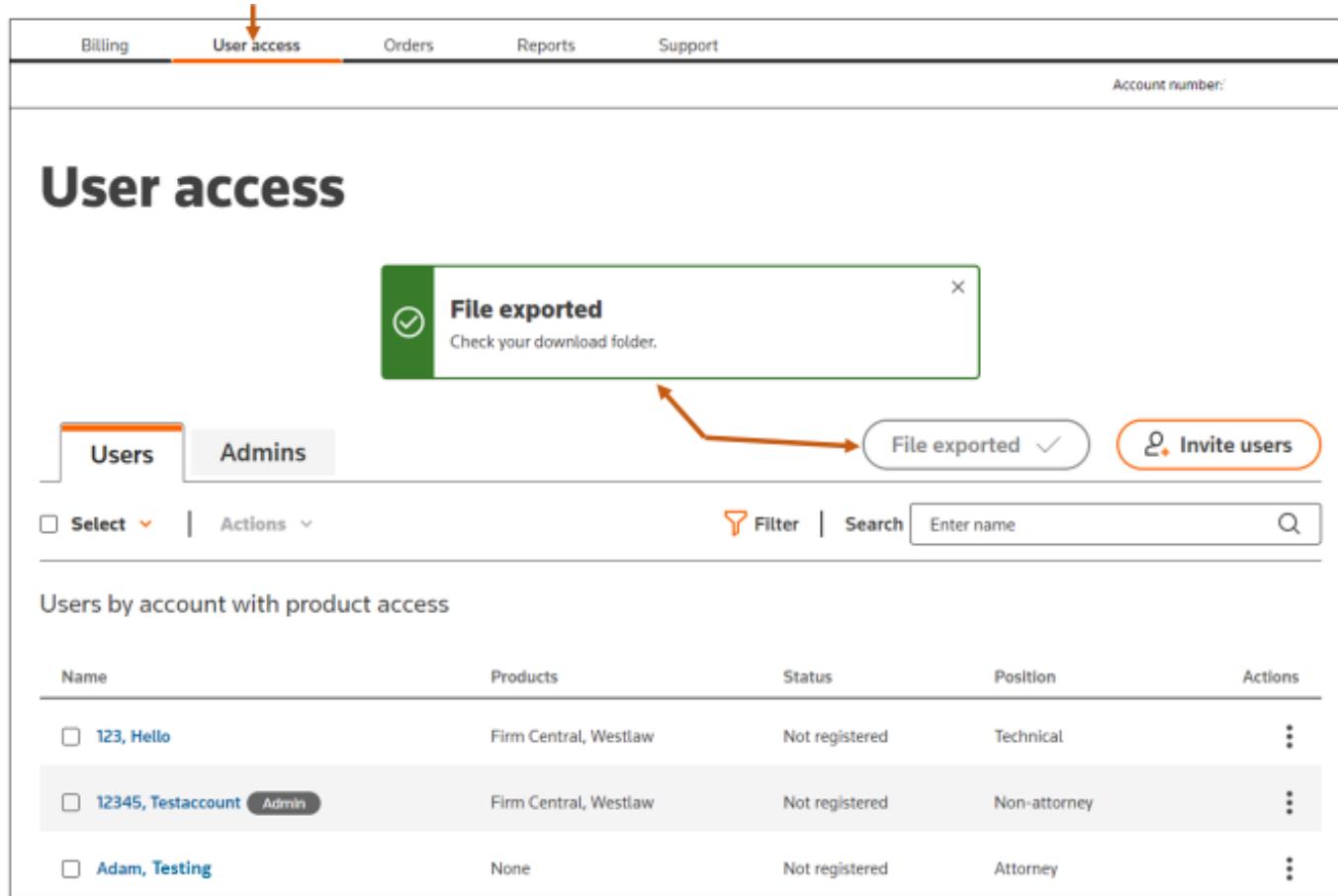
Name	Products	Status	Position	Actions
<input type="checkbox"/> Adam, Testing	None	Not registered	Attorney	⋮
<input type="checkbox"/> Turner, Peter	Westlaw	Not registered	Attorney	⋮
<input type="checkbox"/> C, Skye <small>Admin</small>	Firm Central	Not registered	Attorney	⋮
<input type="checkbox"/> Newusertestemail, 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 shows the 'User access' section of the portal. At the top, there are tabs for Billing, User access (which is highlighted with an orange arrow), Orders, Reports, and Support. Below the tabs, there is a field for 'Account number:' and a large heading 'User access'. A blue status box titled 'Preparing file' with an 'i' icon is displayed, containing the text 'You can keep working while we load your data.' An orange arrow points from this status box to a 'Preparing file' status icon on the right. Below the status box, there are tabs for 'Users' (which is selected and highlighted with an orange border) and 'Admins'. To the right of these tabs are buttons for 'Invite users' and 'Filter'. The main area shows a table titled 'Users by account with product access' 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 <small>Admin</small>	Firm Central, Westlaw	Not registered	Non-attorney	⋮
<input type="checkbox"/> Adam, Testing	None	Not registered	Attorney	⋮

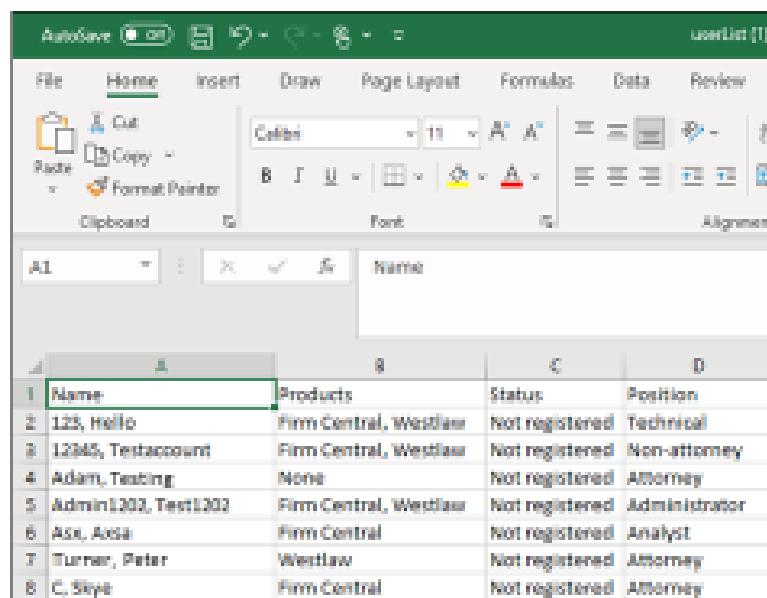
When the download completes, you will see status boxes indicating that the File was exported.



The screenshot shows the 'User access' section of the portal. At the top, there are tabs for 'Billing', 'User access' (which is highlighted with a red arrow), 'Orders', 'Reports', and 'Support'. Below the tabs, there is a search bar with the placeholder 'Account number:'. The main content area is titled 'User access' and contains a green status box with a checkmark and the text 'File exported' followed by 'Check your download folder.' An orange arrow points from this status box to a button labeled 'File exported' with a checkmark. Below the status box, there are tabs for 'Users' (selected) and 'Admins'. Under the 'Users' tab, there is a 'Select' dropdown, an 'Actions' dropdown, a 'Filter' button, a search bar with placeholder 'Enter name', and a magnifying glass icon. The main table is titled 'Users by account with product access' and has columns for 'Name', 'Products', 'Status', 'Position', and 'Actions'. The data in the table is as follows:

Name	Products	Status	Position	Actions
123, Hello	Firm Central, Westlaw	Not registered	Technical	⋮
12345, Testaccount <span style="background-color: #e0f2e0; border-radius: 10px; padding: 2px 5px;">Admin</span>	Firm Central, Westlaw	Not registered	Non-attorney	⋮
Adam, Testing	None	Not registered	Attorney	⋮

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.



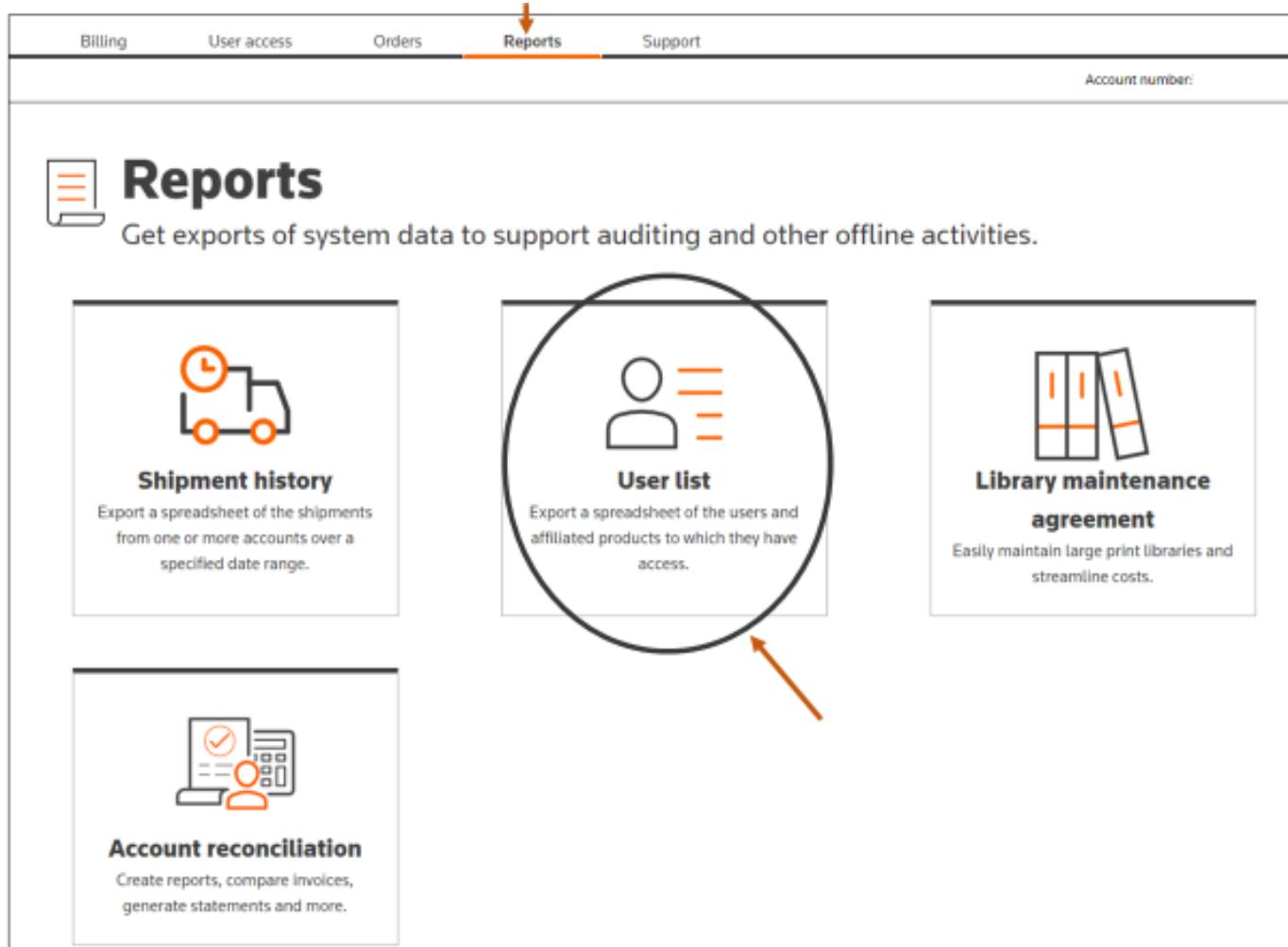
The screenshot shows an Excel spreadsheet with the title 'userList.xlsx'. The table has columns labeled 'A', 'B', 'C', and 'D'. The data is as follows:

A	B	C	D
1 Name	Products	Status	Position
2 123, Hello	Firm Central, Westlaw	Not registered	Technical
3 12345, Testaccount <span style="background-color: #e0f2e0; border-radius: 10px; padding: 2px 5px;">Admin</span>	Firm Central, Westlaw	Not registered	Non-attorney
4 Adam, Testing	None	Not registered	Attorney
5 Admin123, Test123	Firm Central, Westlaw	Not registered	Administrator
6 Asa, Asa	Firm Central	Not registered	Analyst
7 Turner, Peter	Westlaw	Not registered	Attorney
8 C, Sky	Firm Central	Not registered	Attorney

## 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**.



The screenshot shows the top navigation bar with tabs: Billing, User access, Orders, Reports (which has a red arrow pointing to it), and Support. Below the navigation bar, there is a search bar labeled "Account number:" and a "Reports" section. The "Reports" section has a title "Reports" with an icon, a sub-section "Get exports of system data to support auditing and other offline activities.", and four options: "Shipment history", "User list", "Library maintenance agreement", and "Account reconciliation". The "User list" option is highlighted with a red circle and an arrow pointing to it.

**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.

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

1 of 1 selected

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 10

**Review report** **Cancel**

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 <a href="#">Edit</a> <b>user-list-report/Jun 15, 2022 11:10 AM</b>	Date range <a href="#">Edit</a> <b>Today (Jun 15, 2022)</b>
Selected accounts <a href="#">Edit</a> <b>100. **TEST FOR **TESTING ONLY**</b>	Recurring <a href="#">Edit</a> <b>No</b>

**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 [Edit](#)

user-list-report/Jun 15, 2022 11:10 AM

Date range [Edit](#)

Today

(Jun 15, 2022)

Selected accounts [Edit](#)

100:

\*\*TEST FOR

\*\*TESTING ONLY\*\*

Recurring [Edit](#)

No

[Save and run report](#)

[Cancel](#)

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.

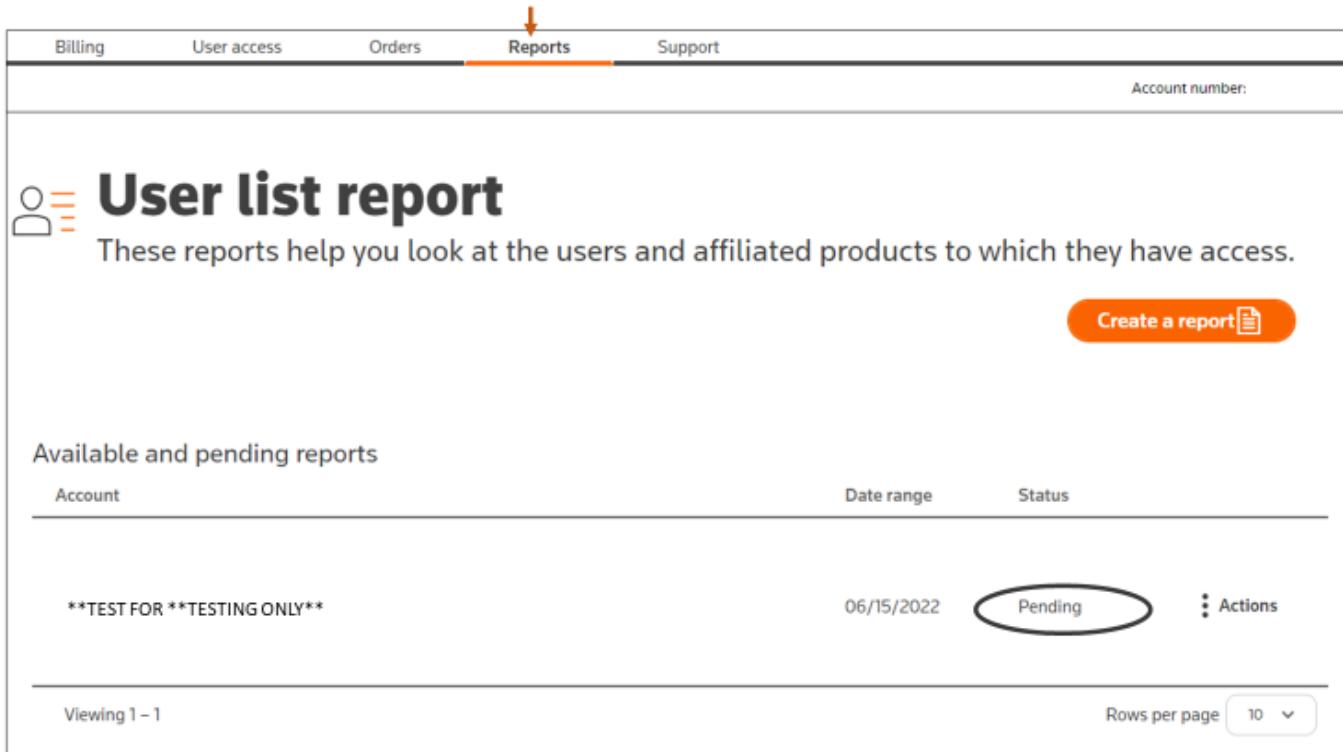
## We're running your report



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](mailto:current.testing@mailinator.com) when the data is available for download.

[Back to reports](#)

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



Account number: [REDACTED]

## User list report

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

Create a report

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

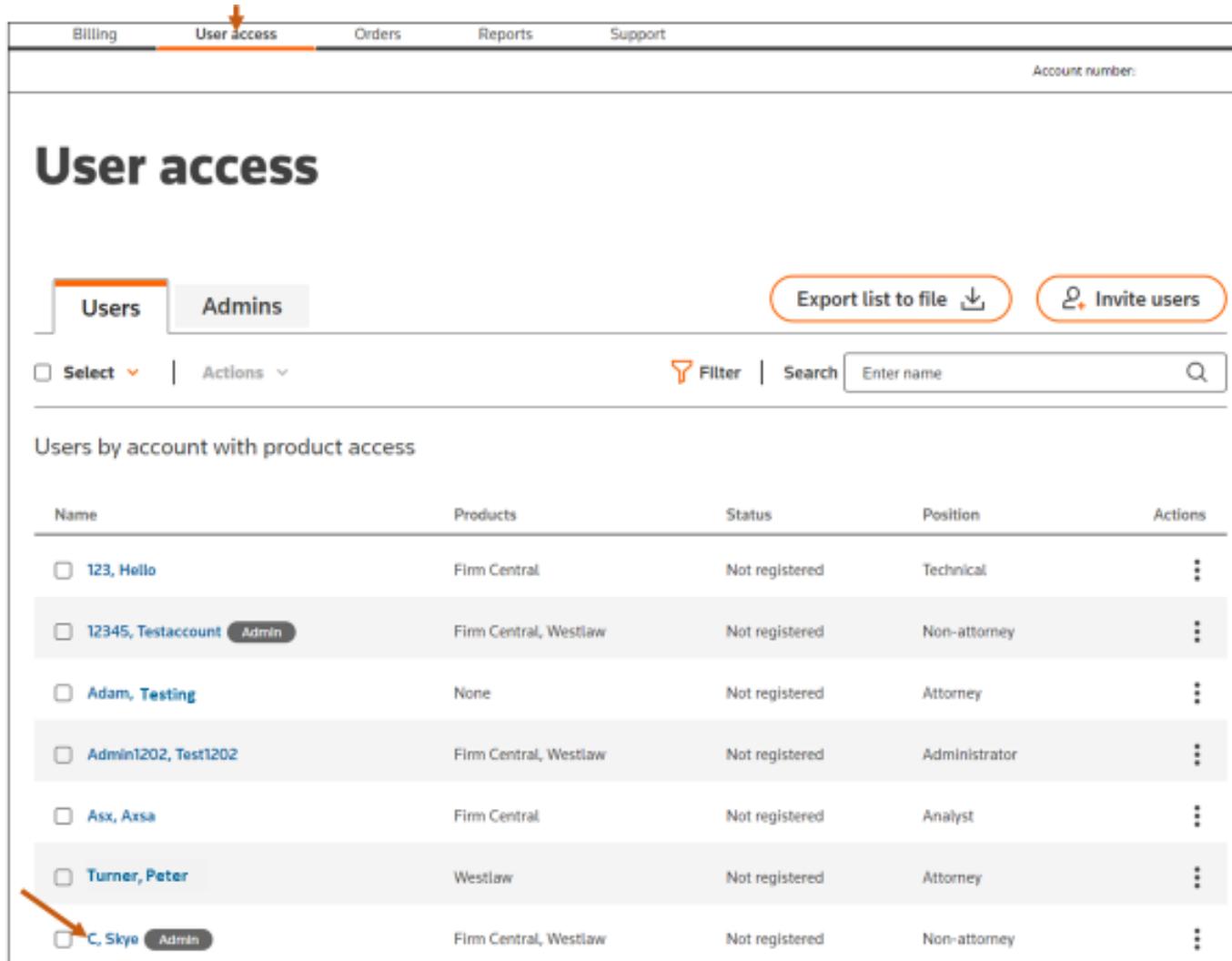
Viewing 1 – 1

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' section of the self-service portal. At the top, there are tabs for Billing, User access (which is highlighted with a red arrow), Orders, Reports, and Support. Below the tabs, there is a search bar labeled 'Account number:' and a large title 'User access'. Underneath the title, there are two tabs: 'Users' (which is selected and highlighted with a red arrow) and 'Admins'. To the right of these tabs are buttons for 'Export list to file' and 'Invite users'. Below the tabs, there is a search bar with a 'Filter' icon and a 'Search' button. The main area is titled 'Users by account with product access' and contains a table with the following data:

Name	Products	Status	Position	Actions
123, Hello	Firm Central	Not registered	Technical	⋮
12345, Testaccount <span style="border: 1px solid #ccc; padding: 2px;">Admin</span>	Firm Central, Westlaw	Not registered	Non-attorney	⋮
Adam, Testing	None	Not registered	Attorney	⋮
Admin1202, Test1202	Firm Central, Westlaw	Not registered	Administrator	⋮
Axa, Axa	Firm Central	Not registered	Analyst	⋮
Turner, Peter	Westlaw	Not registered	Attorney	⋮
C. Skye <span style="border: 1px solid #ccc; padding: 2px;">Admin</span>	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 the 'User access' section of the Thomson Reuters Self-Service Portal. At the top, there is a back arrow labeled 'Back to User access', a user profile icon for 'Skye C', and a 'Remove Skye' button. The main area is divided into two main sections: 'Personal details' on the left and 'Products' on the right.

**Personal details:**

- 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:**

**Products not yet registered** (with a collapse arrow):  
Send an invite link for any products that are not yet registered.

**Send registration links** (button)

**Firm Central** (Product admin)  
Registration key: 13936496

**Westlaw**  
Registration key: 13936495

**Edit products** (button)

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

← Back to User access

**Skye C**

Status: Not registered

**Personal details**

First name: Skye  
First name can't be edited

Last name:

Contact ID: 0027613325  
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 Subscriptions

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

**Products**

**Products not yet registered**

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

**Send registration links**

**Firm Central** (Product admin)

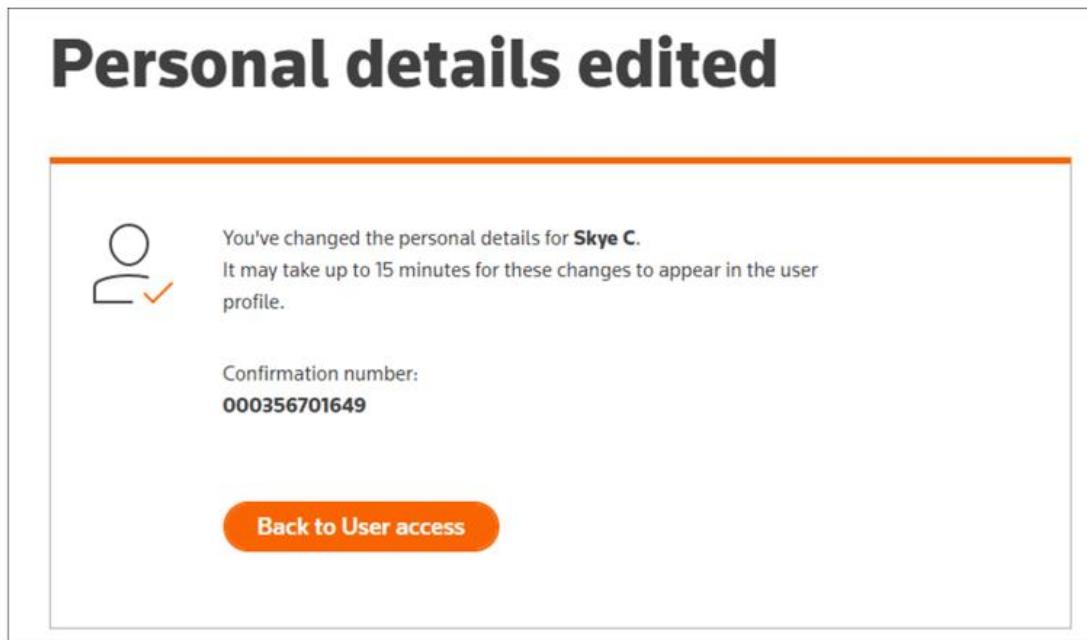
Registration key: 139986496-

**Westlaw**

Registration key: 139986495-

**Save** **Cancel**

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**.

The image shows the "User access" tab in the self-service portal. At the top, there is a navigation bar with tabs for "Billing", "User access" (which is highlighted with an orange arrow), "Orders", "Reports", and "Support". Below the navigation bar, there is a search bar with the placeholder "Account number:".

## User access

Users Admins

Export list to file Invite users

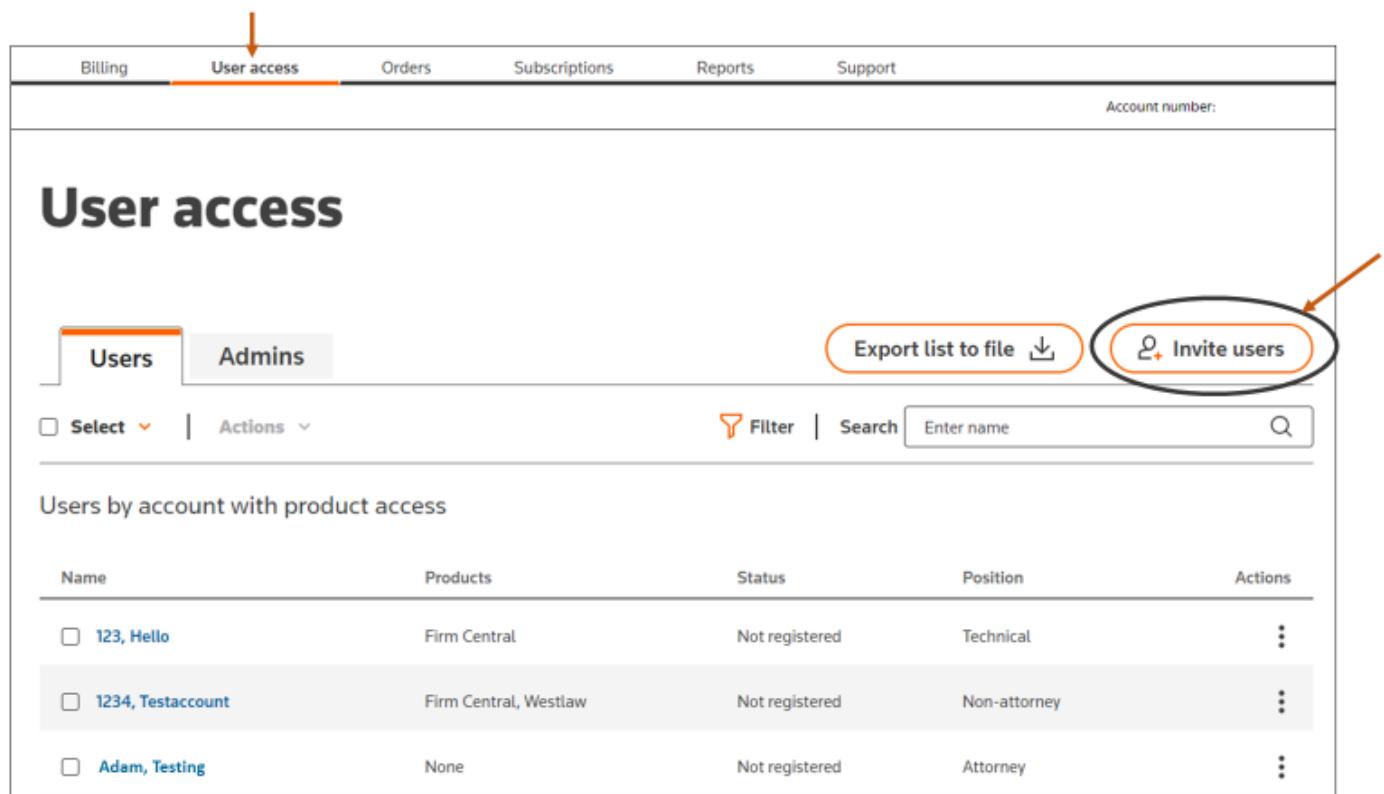
Select Actions Filter Enter name

### 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	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	Firm Central, Westlaw	Updating user	Non-attorney	

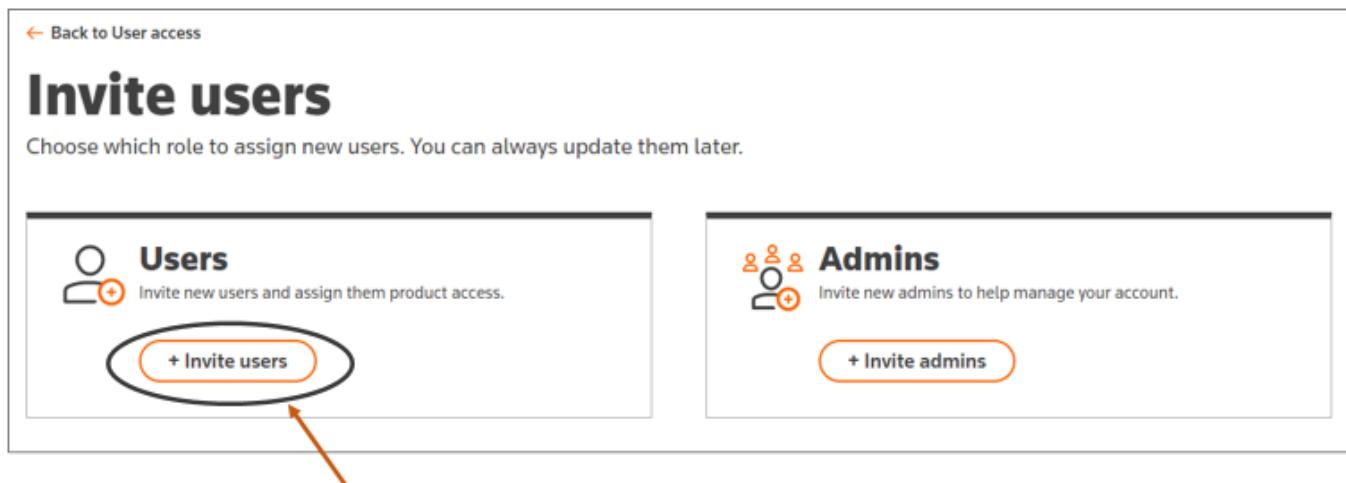
## Add Users

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



The screenshot shows the 'User access' tab selected in the top navigation bar. Below the navigation is a search bar with 'Account number:' and a placeholder 'Enter name'. On the left, there are tabs for 'Users' (selected) and 'Admins'. Below these are buttons for 'Select' and 'Actions'. To the right are 'Filter' and 'Search' options. At the top right is an 'Export list to file' button. On the far right, an 'Invite users' button is highlighted with an orange oval and an arrow pointing to it. The main content area is titled 'Users by account with product access' and lists three users: '123, Hello', '1234, Testaccount', and 'Adam, Testing', each with a checkbox, product access, status, position, and an 'Actions' menu.

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



The screenshot shows the 'Invite users' sub-page. At the top left is a 'Back to User access' link. The main title is 'Invite users' with the sub-instruction 'Choose which role to assign new users. You can always update them later.' Below this are two sections: 'Users' and 'Admins'. The 'Users' section has an icon, the text 'Invite new users and assign them product access.', and a '+ Invite users' button highlighted with an orange oval and an arrow pointing to it. The 'Admins' section has an icon, the text 'Invite new admins to help manage your account.', and 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 <input type="text" value="Enter first name"/>	Last name <input type="text" value="Enter last name"/>	Position <input style="width: 100px; height: 30px; border: 1px solid black; border-radius: 10px; padding: 5px; background-color: #f0f0f0; color: #333; font-weight: bold; font-size: 10px; margin-right: 10px;" type="button" value="Choose"/>
<small>Enter a first name.</small>		
Email <input type="text" value="Enter email"/>	End date mm/dd/yyyy (optional) <input type="text"/>	
<a href="#">+ Add another user</a>		

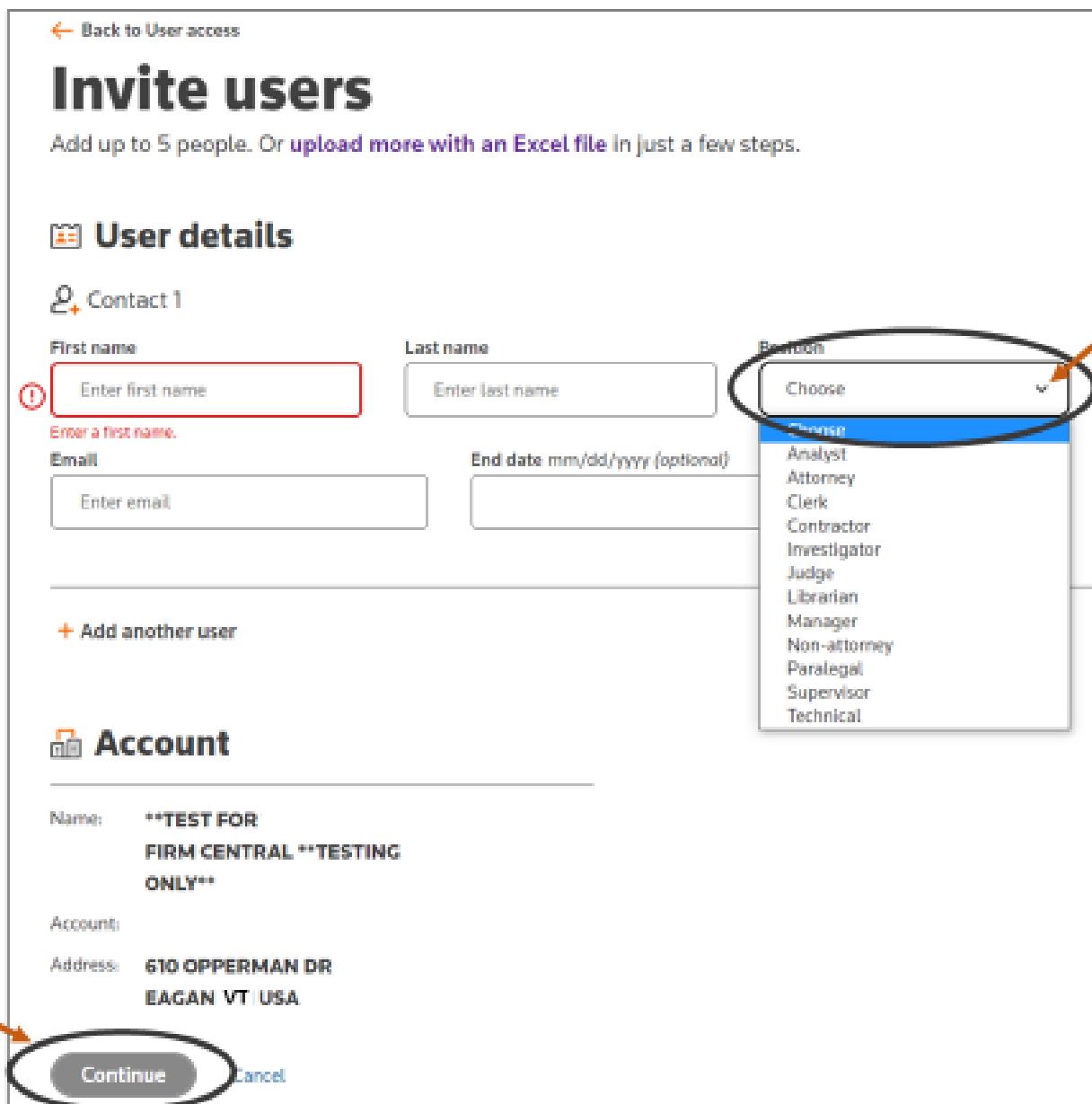
**Account**

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

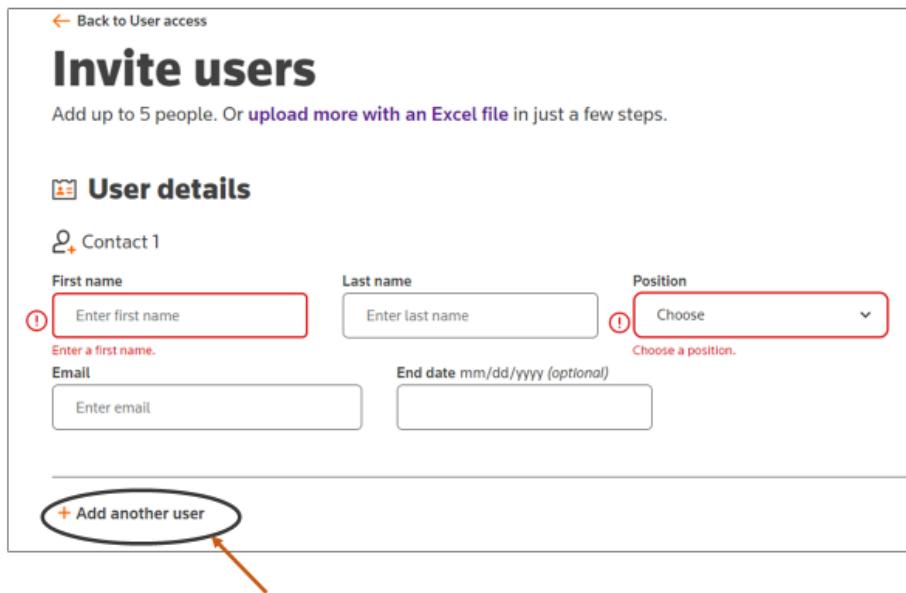
Account:

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

[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.

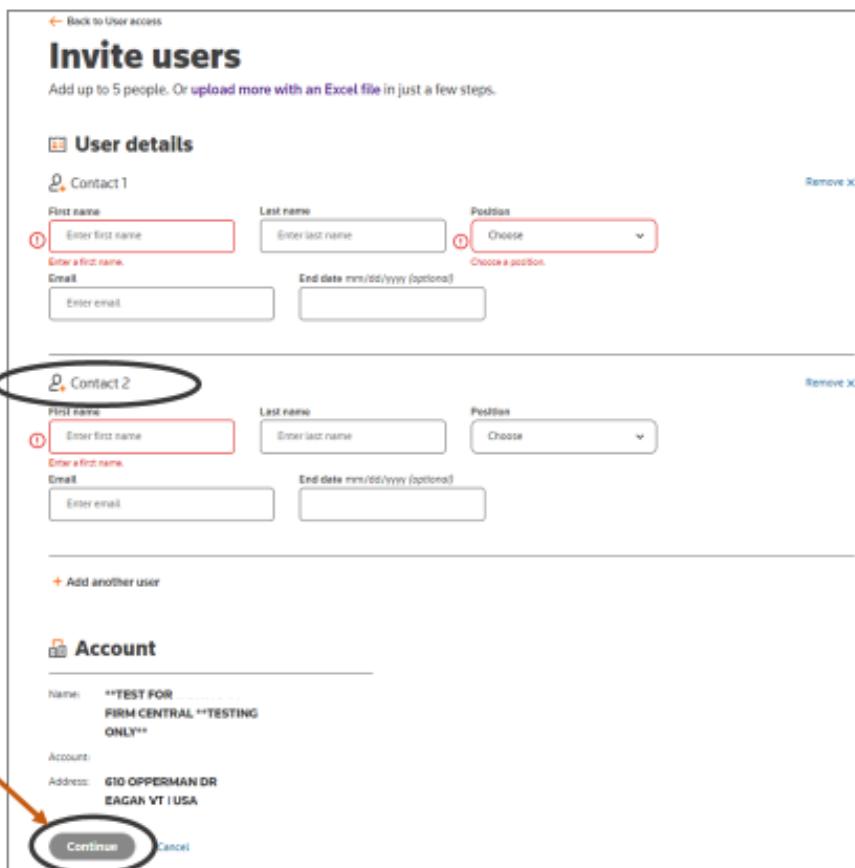
### User details

**Contact 1**

First name <input type="text" value="Enter first name"/>	Last name <input type="text" value="Enter last name"/>	Position <input type="text" value="Choose"/>
Enter a first name.		
Email <input type="text" value="Enter email"/>	End date mm/dd/yyyy (optional) <input type="text"/>	

[+ 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**

First name <input type="text" value="Enter first name"/>	Last name <input type="text" value="Enter last name"/>	Position <input type="text" value="Choose"/>
Enter a first name.		
Email <input type="text" value="Enter email"/>	End date mm/dd/yyyy (optional) <input type="text"/>	

**Contact 2**

First name <input type="text" value="Enter first name"/>	Last name <input type="text" value="Enter last name"/>	Position <input type="text" value="Choose"/>
Enter a first name.		
Email <input type="text" value="Enter email"/>	End date mm/dd/yyyy (optional) <input type="text"/>	

[+ 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 <input type="text" value="Enter first name"/> <small>① Enter a first name.</small>	Last name <input type="text" value="Enter last name"/>	Position <input type="text" value="Choose"/> <small>① Choose a position.</small>
Email <input type="text" value="Enter email"/>	End date mm/dd/yyyy (optional) <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**.

A	B	C	D	E
1 First name	Last name	Position	Email	End date (mm/dd/yyyy, optional)
2 Sadie P		Contractor	sadie.p@abc.com	None
3				
4				

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

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

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
Sadie	P	Contractor
Email	End date mm/dd/yyyy (optional)	
sadie.p@abc.com		

[+ 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' interface. On the left, there are sections for 'User details', 'Account', and 'Products'. The 'Products' section contains a 'Looking for something?' search bar and a list of products. The 'Westlaw' product is selected, indicated by an orange circle with a checkmark and highlighted with a red oval. The 'Firm Central' product is also listed. At the bottom of the products section, there are 'Continue' and 'Cancel' buttons, with the 'Continue' button highlighted with a red oval and an arrow pointing to it. On the right, a modal window titled 'Firm Central' is displayed. It contains a checkbox for 'Firm Central' (which is checked) and a sub-section titled 'Product admin (optional)' with a checkbox for 'Firm Central Administrator' (which is unchecked). There are 'Continue' and 'Cancel' buttons at the bottom of the modal, with the 'Continue' button highlighted with a red oval and an arrow pointing to it. A large orange arrow points from the 'Continue' button in the main interface to the 'Continue' button in the modal window.

← Back to User access

## Invite users

**User details**

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

**Edit user details**

**Account**

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

Account: 100-

Address: 610 OPPERMAN DR  
EAGAN VT USA

**Products**

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**

**Firm Central**

**Product admin (optional)**

Firm Central Administrator

**Continue** **Cancel**

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

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

### Account

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

Account: 100-

Address: 610 OPPERMAN DR  
BAGAN VT USA

### Products

[Edit products](#)

Wetlaw

### Confirmation email

You'll receive a confirmation email at  
alicetestcspmyasync@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.

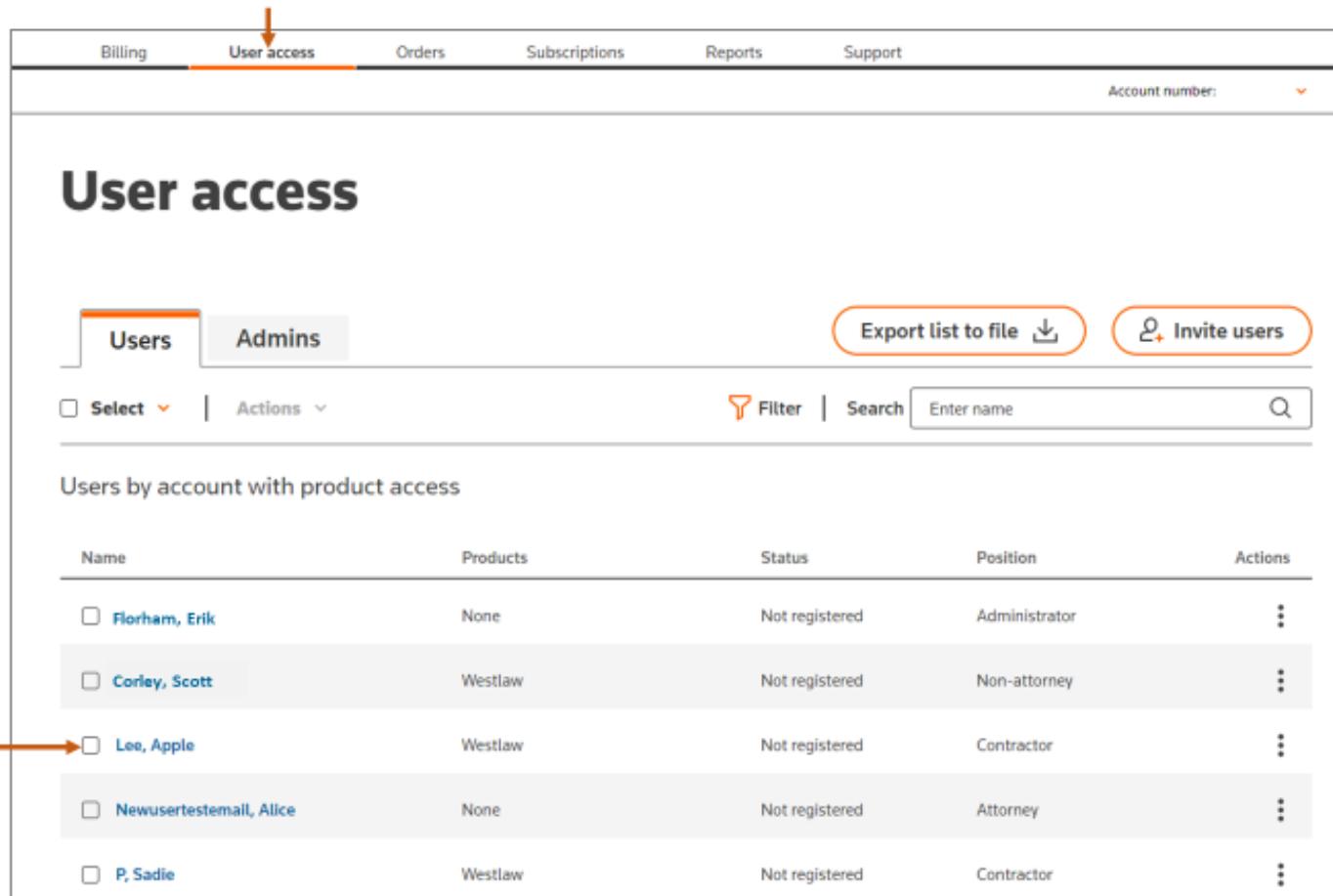
The screenshot shows the 'User access' tab selected in the top navigation bar. A blue notification box at the top center says 'Added 1 user' with a dismiss button. Below it, a table lists users with columns for Name, Products, Status, Position, and Actions. A new user, 'P. Sadie', is listed at the bottom with a status of 'Adding user'. An orange arrow points to this row, and another orange arrow points to the 'Adding user' status.

Name	Products	Status	Position	Actions
Florham, Erik	None	Not registered	Administrator	...
Corley, Scott	Westlaw	Not registered	Non-attorney	...
Lee, Apple	Westlaw	Not registered	Contractor	...
Nenusertestemail, Alice	None	Not registered	Attorney	...
P. Sadie	Westlaw	Not registered	Contractor	...
Prodjarvel, Alice3	Firm Central, Westlaw	Not registered	Attorney	...
Products, Multiple	Westlaw	Not registered	Non-attorney	...
P. Sadie	Westlaw	Adding user	Non-attorney	...

## Remove Users

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

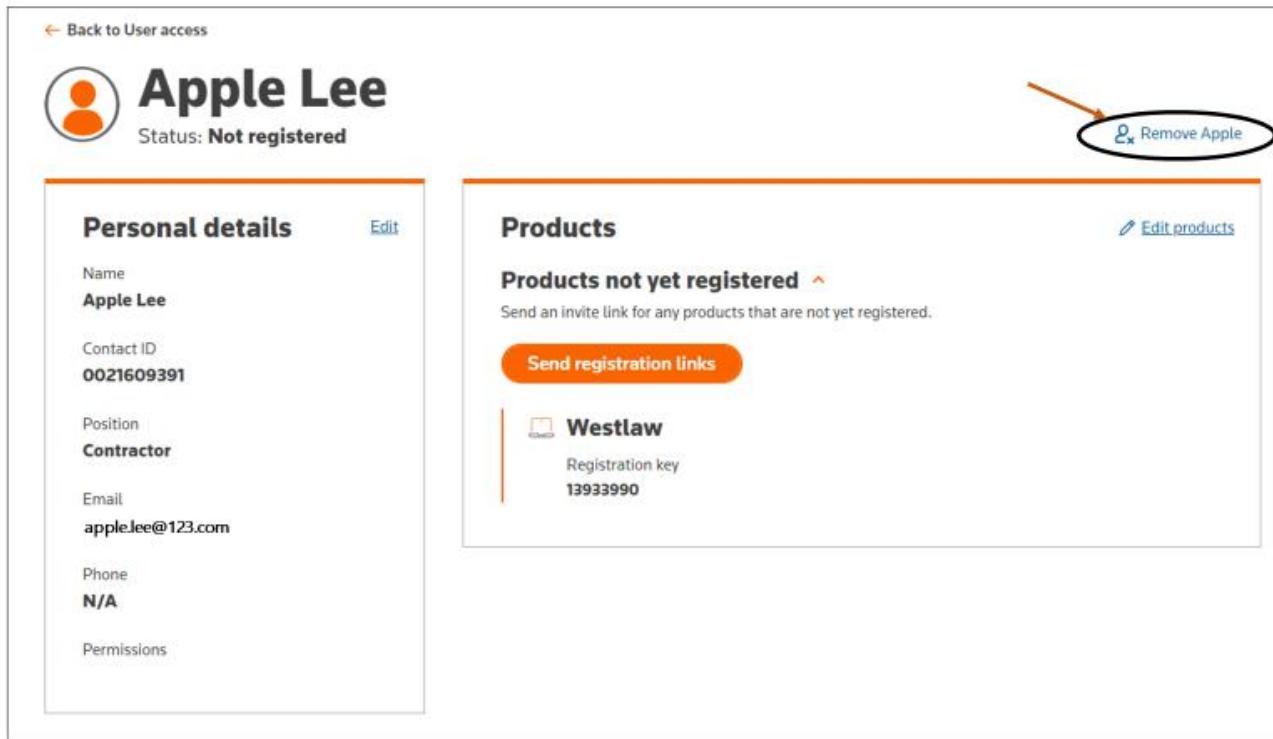
- 1) Navigate to the **User access** tab and click on the user that you want to remove.



The screenshot shows the 'User access' tab selected in the top navigation bar. The main content area is titled 'User access' and contains a table of users. The table has columns for Name, Products, Status, Position, and Actions. A red arrow points to the 'User access' tab, and another red arrow points to the checkbox for 'Lee, Apple' in the list.

Name	Products	Status	Position	Actions
Florham, Erik	None	Not registered	Administrator	⋮
Corley, Scott	Westlaw	Not registered	Non-attorney	⋮
Lee, Apple	Westlaw	Not registered	Contractor	⋮
Newusertestemail, Alice	None	Not registered	Attorney	⋮
P, Sadie	Westlaw	Not registered	Contractor	⋮

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



← Back to User access

## Apple Lee

Status: Not registered

**Personal details** [Edit](#)

Name  
**Apple Lee**

Contact ID  
**0021609391**

Position  
**Contractor**

Email  
**apple.lee@123.com**

Phone  
**N/A**

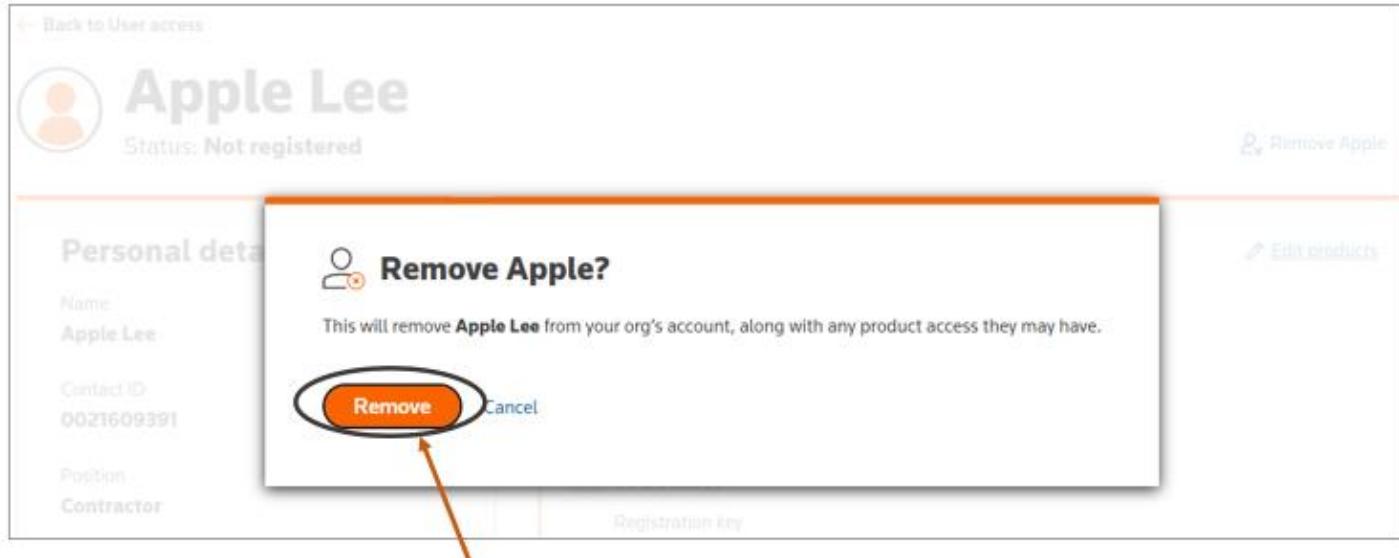
Permissions

**Products** [Edit products](#)

**Products not yet registered** [Send registration links](#)

**Westlaw**  
Registration key  
**13933990**

Then, click **Remove**.



← Back to User access

## Apple Lee

Status: Not registered

**Personal details** [Edit](#)

Name  
**Apple Lee**

Contact ID  
**0021609391**

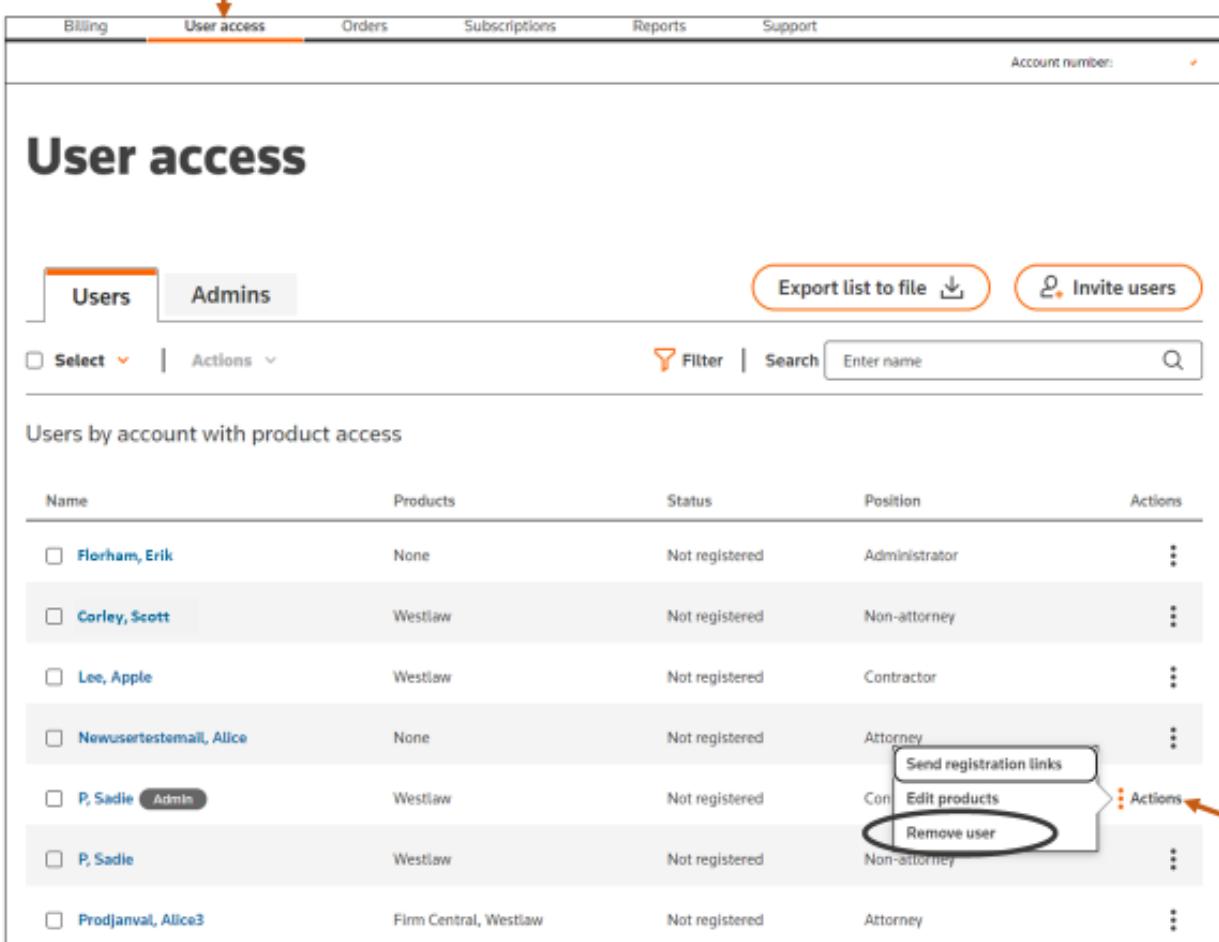
Position  
**Contractor**

**Remove Apple?**

This will remove **Apple Lee** from your org's account, along with any product access they may have.

**Remove** [Cancel](#)

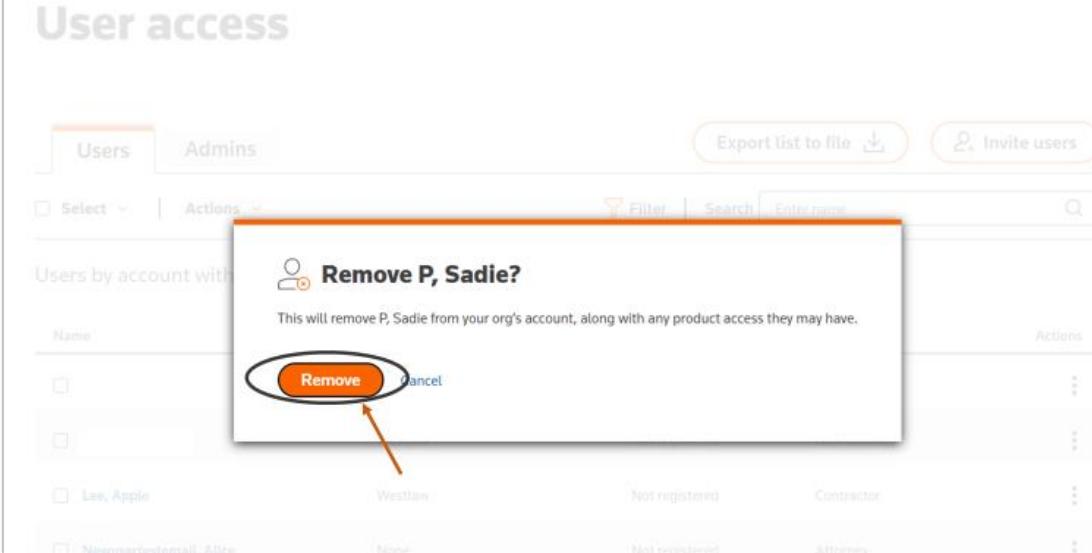
2) Navigate to the **User access** tab. Click on the three dots under the **Actions** tab for the user you want to remove. Then, select **Remove user**.



The screenshot shows the 'User access' tab selected in the navigation bar. The main content area is titled 'User access' and contains two tabs: 'Users' (selected) and 'Admins'. There are buttons for 'Export list to file' and 'Invite users'. Below these are filters and a search bar. The main table lists users by account with product access. One row for 'P. Sadie' is highlighted, showing details: Name (P. Sadie), Products (Westlaw), Status (Not registered), Position (Non-attorney). The 'Actions' column for this user shows a context menu with options: 'Send registration links', 'Edit products', and 'Remove user'. The 'Remove user' option is circled with a red oval, and a red arrow points from the text 'Then, click Remove.' to this option. The 'Actions' button in the original screenshot is also circled with a red oval.

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

Then, click **Remove**.



The screenshot shows the 'User access' tab selected. A confirmation dialog box is displayed over the user list, asking 'Remove P. Sadie?'. The dialog states: 'This will remove P. Sadie from your org's account, along with any product access they may have.' It contains two buttons: 'Remove' (highlighted with a red oval and a red arrow pointing from the previous screenshot) 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.

The image shows two screenshots of the Self-Service Portal. The left screenshot is a confirmation message titled 'Removing user' with a message: '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.' It includes a 'Confirmation number: 000356695601' and an 'Back to User access' button. A large orange arrow points from this screen to the right screenshot. The right screenshot shows the 'User access' page with a 'Removed 1 user' message. The table lists users with product access, and the row for 'P. Sadie' has a circled 'Removing user' status indicator.

Name	Products	Status	Position	Actions
123. Hello	Firm Central	Not registered	Technical	⋮
12345. Testaccount <span style="background-color: #e0f2f1; border: 1px solid #4f81bd; padding: 2px;">Admin</span>	Firm Central, Westlaw	Not registered	Non-attorney	⋮
Programmer, Alice	Firm Central, Westlaw	Not registered	Attorney	⋮
Products, Multiple	Westlaw	Not registered	Non-attorney	⋮
P. Sadie	Westlaw	<span style="border: 1px solid #4f81bd; border-radius: 50%; padding: 2px;">Removing user</span>	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' tab selected in the top navigation bar. Below the navigation, there are tabs for 'Users' and 'Admins', with 'Users' currently selected. A 'Select' dropdown is open, and an 'Actions' button is highlighted with a red arrow. A dropdown menu is open next to 'Actions', showing 'Send registration links' and 'Remove users', with 'Remove users' also highlighted with a red arrow. The main table lists users with checkboxes. Two checkboxes are checked: 'Lee, Apple' and 'P, Sadie'. A large red arrow points from the 'Actions' button in the screenshot to the 'Remove users' option in the dropdown menu. The table columns are: Name, Products, Status, Position, and Actions. The data in the table is as follows:

Name	Products	Status	Position	Actions
<input type="checkbox"/> Florham, Erik	None	Not registered	Administrator	...
<input type="checkbox"/> Corlex, Scott	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, Sadie <span style="border: 1px solid black; padding: 2px;">Admin</span>	Westlaw	Not registered	Contractor	...
<input checked="" type="checkbox"/> P, Sadie	Westlaw	Not registered	Non-attorney	...
<input type="checkbox"/> Prodjanval, 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	<a href="#">Remove from list</a>
Lee, Apple	a.lee@abc.com	Westlaw	Contractor	<a href="#">Remove from list</a>

**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	<a href="#">Remove from list</a>
Lee, Apple	a.lee@abc.com	Westlaw	Contractor	<a href="#">Remove from list</a>

**Confirm** [Cancel](#)

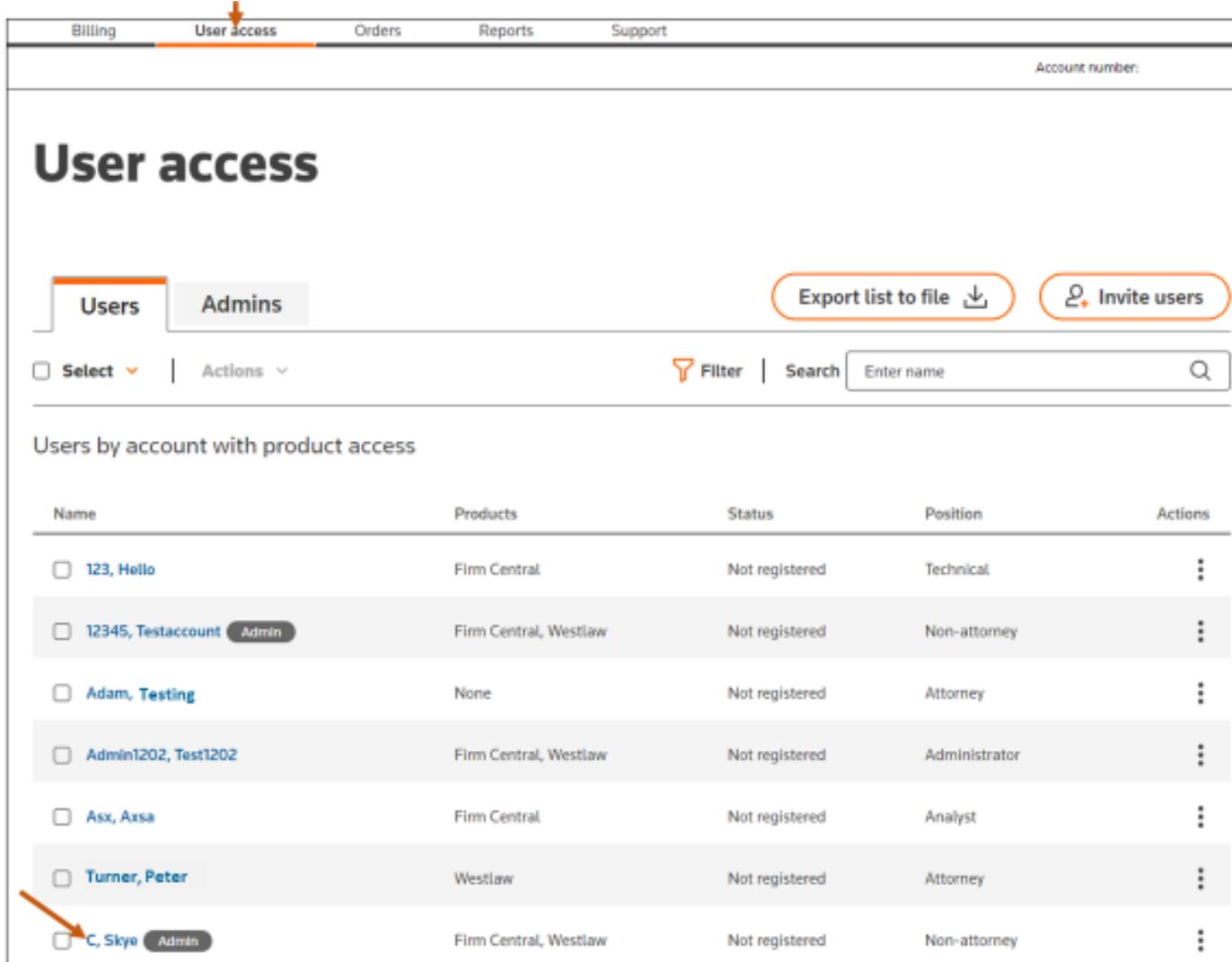


- 4) An administrator who manages multiple location accounts, may remove users through the Find a User page.

## Send/Resend Product Registration Links

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

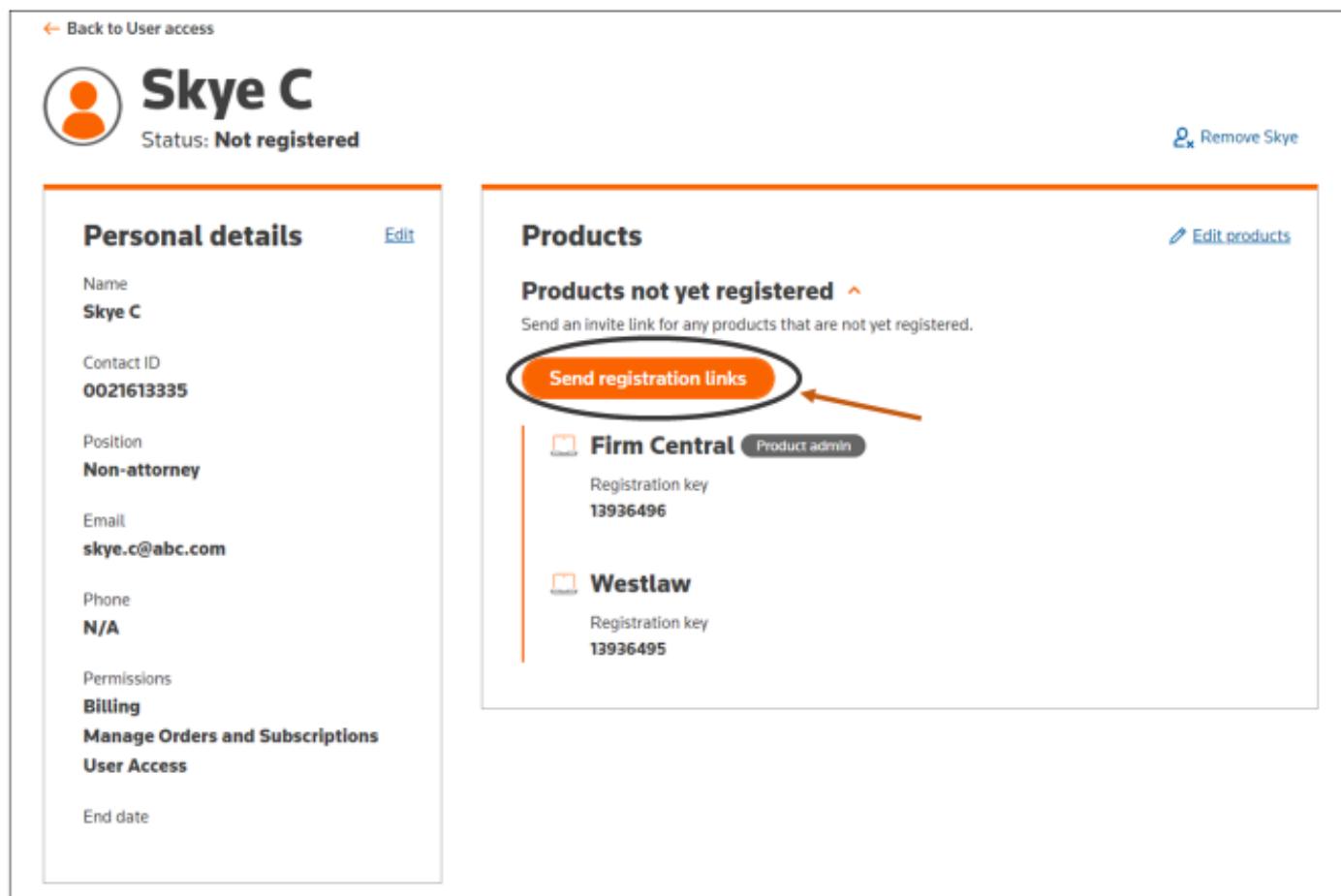
- 1) Navigate to the **User access** tab and click the user to whom you want to send a product registration link.



The screenshot shows the 'User access' page. At the top, there is a navigation bar with tabs: Billing, **User access** (which is highlighted with a red arrow), Orders, Reports, and Support. Below the navigation bar, there is a search bar labeled 'Account number:'. The main title is 'User access'. Below the title, there are two tabs: 'Users' (selected) and 'Admins'. On the right side, there are buttons for 'Export list to file' and 'Invite users'. Below these buttons, there are dropdown menus for 'Select' and 'Actions', and search fields for 'Filter' and 'Search' with an 'Enter name' placeholder. 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"/> 12345, Testaccount <span>Admin</span>	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 <span>Admin</span>	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

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](#)

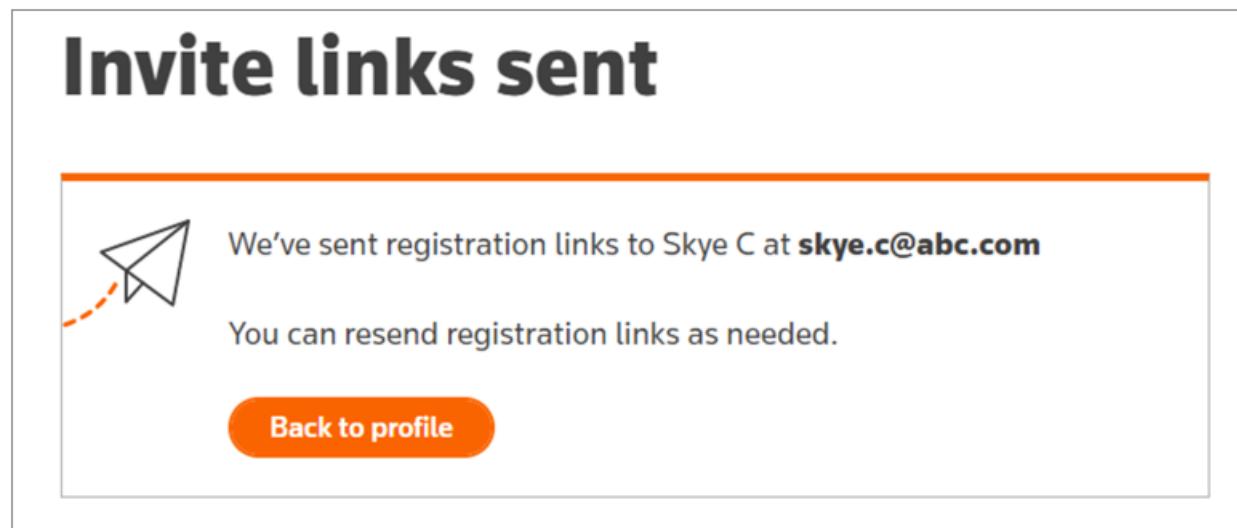
#### Products not yet registered ^

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

**Send registration links**

 <b>Firm Central</b> <small>Product admin</small>	Registration key 13936496
 <b>Westlaw</b>	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 **skyec@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**.

**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"/> 123, Hello	Firm Central	Not registered	Technical	...
<input type="checkbox"/> 12345, Testaccount <b>Admin</b>	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"/> Ass, Asaa	Firm Central	Not registered	Analyst	...
<input type="checkbox"/> Turner, Peter	Westlaw	Not registered	Attorney	...
<input type="checkbox"/> C, Skye <b>Admin</b>	Firm Central	Not registered	Analyst	<b>Send registration links</b> <b>Edit products</b> <b>Remove user</b>

Next, click **Send**.

**User access**

**Users** **Admins** **Export list to file**

**Select** **Actions** **Filter** **Search** **Enter name**

**Send registration links?**

Registration links will be sent to skye.c@abc.com for products that are not yet registered

**Send** **Cancel**

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 the portal. At the top, there are tabs for 'Billing', 'User access' (which is highlighted with an orange arrow), 'Orders', 'Reports', and 'Support'. Below the tabs, there is a search bar labeled 'Account number:'. The main title 'User access' is displayed in a large, bold font. Below the title, there are two tabs: 'Users' (which is selected and highlighted with an orange border) and 'Admins'. To the right of these tabs are buttons for 'Export list to file' and 'Invite users'. Underneath the tabs, there are filters for 'Select' and 'Actions', and search fields for 'Filter' and 'Search' with an 'Enter name' placeholder and a magnifying glass icon. 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
123, Hello	Firm Central	Not registered	Technical	⋮
12345, Testaccount <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">Admin</span>	Firm Central, Westlaw	Not registered	Non-attorney	⋮
Adam, Testing	None	Not registered	Attorney	⋮
Admin1202, Test1202	Firm Central, Westlaw	Not registered	Administrator	⋮
Asx, Axa	Firm Central	Not registered	Analyst	⋮
Turner, Peter	Westlaw	Not registered	Attorney	⋮
C, Skye <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">Admin</span>			Attorney	⋮

A green success message box is displayed at the bottom of the table, containing the text 'Registration links have been sent to the user' with a checkmark icon. An orange arrow points from the text 'Registration links have been sent to the user' in the 'After clicking send' section of the instructions to this message box.

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' tab selected in the top navigation bar. The main content area is titled 'User access' and displays a list of users. At the top of the list, there are buttons for 'Users' and 'Admins', and a dropdown for 'Select'. Below these are buttons for 'Actions' (with a dropdown menu) and 'Filter' (with a search bar). A large orange arrow points from the text 'Select the users to whom you want to send the registration links.' to the 'Actions' dropdown. Another orange arrow points from the text 'Then, click Send registration links.' to the 'Send registration links' option in the dropdown menu. The 'Send registration links' option is circled in orange. The user list table has columns for Name, Products, Status, Position, and Actions. Two users, 'Lee, Apple' and 'P. Sadia', have checkboxes checked in the 'Select' column, and their rows are highlighted in blue. The 'Actions' column for these users shows a blue 'Admin' badge next to their names.

Name	Products	Status	Position	Actions
Goel, Krystal	Firm Central, Westlaw	Not registered	Analyst	...
Florham, Erik	None	Not registered	Administrator	...
Turner, Peter	Westlaw	Not registered	Non-attorney	...
Lee, Apple	Westlaw	Not registered	Contractor	...
Newusertestemail, Alice	None	Not registered	Attorney	...
P, Sadie	Westlaw	Not registered	Contractor	...
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	<a href="#">Remove from list</a>
P, Sadie	sadie.p@abc.com	Westlaw	Non-attorney	<a href="#">Remove from list</a>

**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	<a href="#">Remove from list</a>
P, Sadie	sadie.p@abc.com	Westlaw	Non-attorney	<a href="#">Remove from list</a>

**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.

# Users invited

 You've invited 2 users.

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

Invited by:

[Back to User access](#)

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.

BOOMI-QA: Thomson Reuters Access Confirmation

 [Donotreply](#)  
[To](#) 

[If there are problems with how this message is displayed, click here to view it in a web browser.](#)

 THOMSON REUTERS

Apple Lee,

Welcome to Thomson Reuters. This email contains your activation information required to register products to your OnePass account.

[Registration Keys](#)

Westlaw ®  
139:

[Register](#)



**What is a registration key?**  
A registration key allows you to activate a product using your OnePass account.

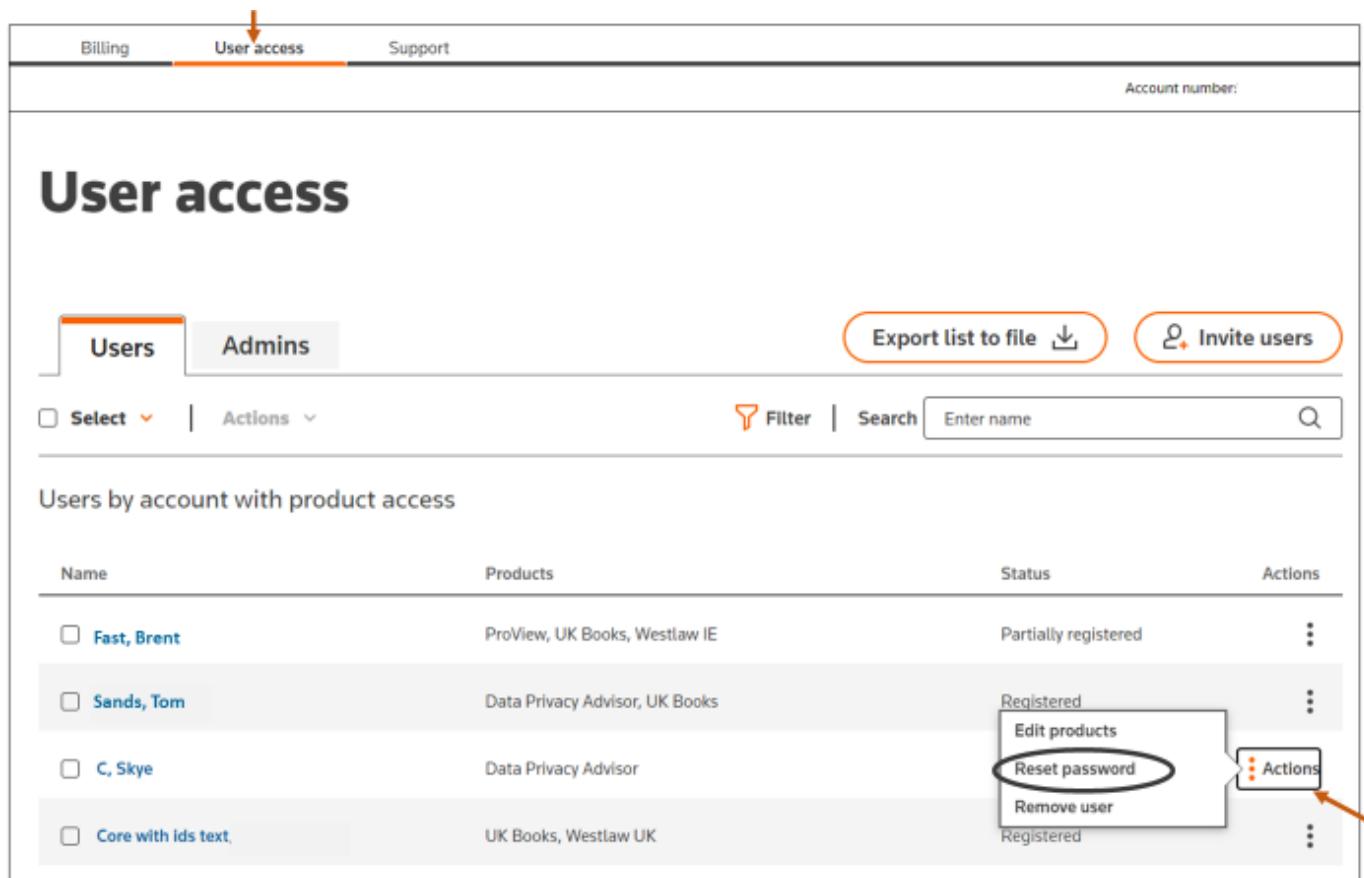
**What is OnePass?**  
OnePass is the online record of the username and password you personally select to access Thomson Reuters products, and allows you to sign on to multiple Thomson Reuters products with a single username and password.

**Already have OnePass?**  
A registration key allows you to tie each Thomson Reuters product or service within your subscription to your OnePass.

## 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' page with the 'User access' tab selected. The main content area displays a table of users with columns for Name, Products, Status, and Actions. For the user 'Sands, Tom', the 'Actions' menu is open, showing options: 'Edit products', 'Reset password' (which is circled in red), and 'Remove user'. A red arrow points from the 'Reset password' option to the 'Actions' button. The 'Users' tab is selected in the navigation bar.

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, 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

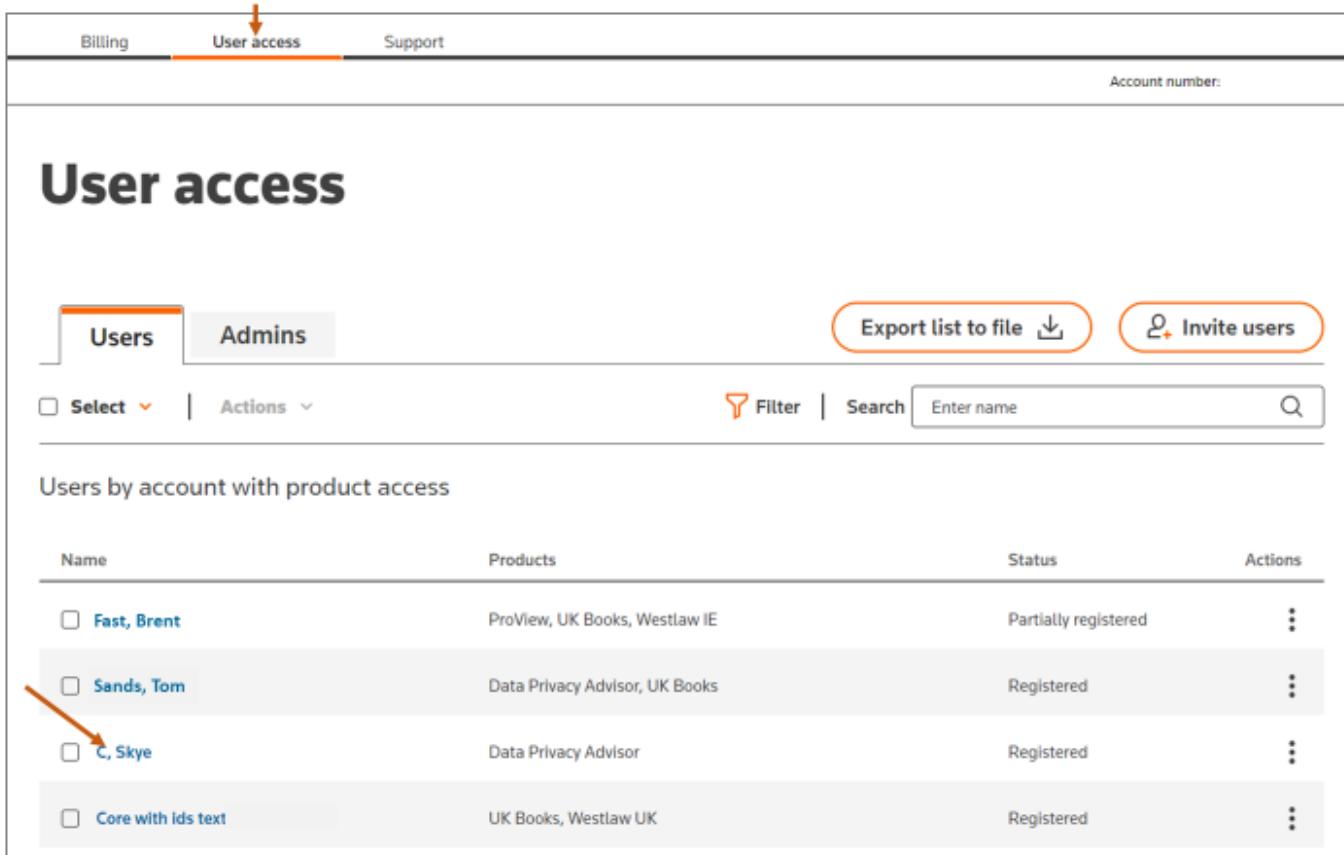
Reset by

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.



**User access**

**Users** Admins

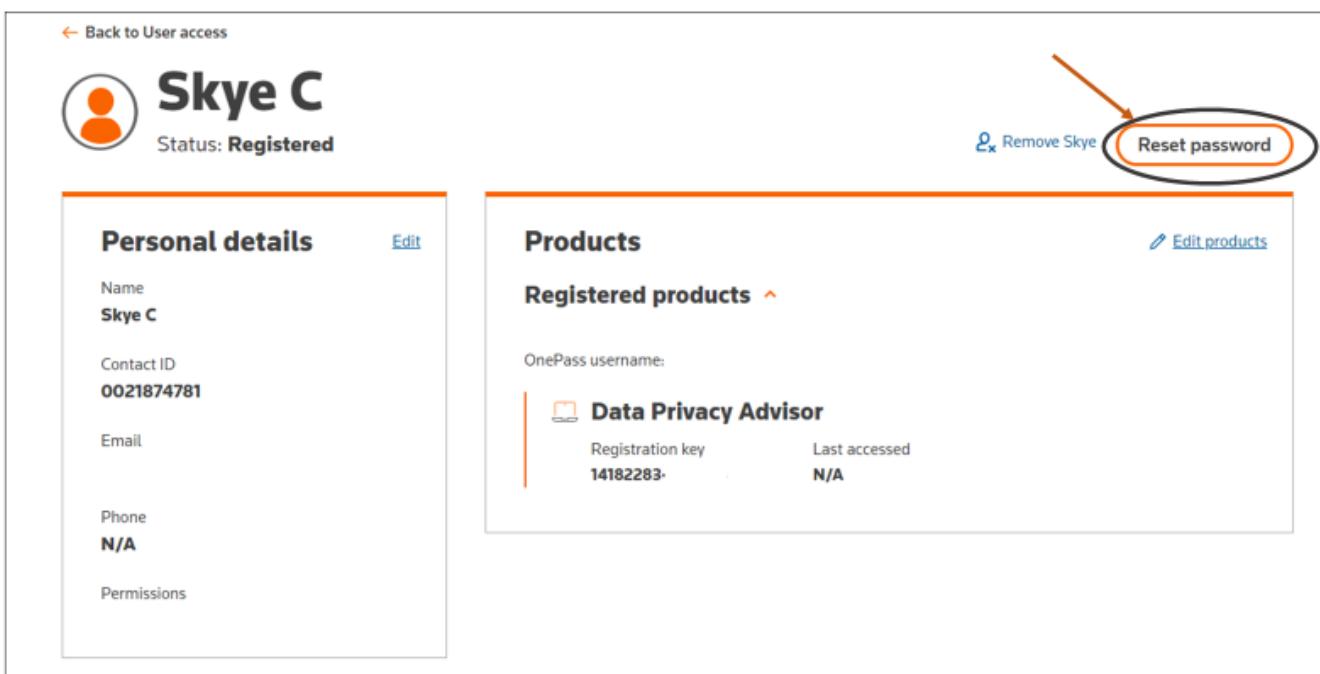
Export list to file  Invite users 

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

 **Personal details**

Name: Skye C  
Contact ID: 0021874781  
Email:   
Phone: N/A  
Permissions: 

 **Products**

**Registered products** 

OnePass username:  **Data Privacy Advisor**  
Registration key: 14182283- Last accessed: N/A

 Remove Skye  **Reset password**

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

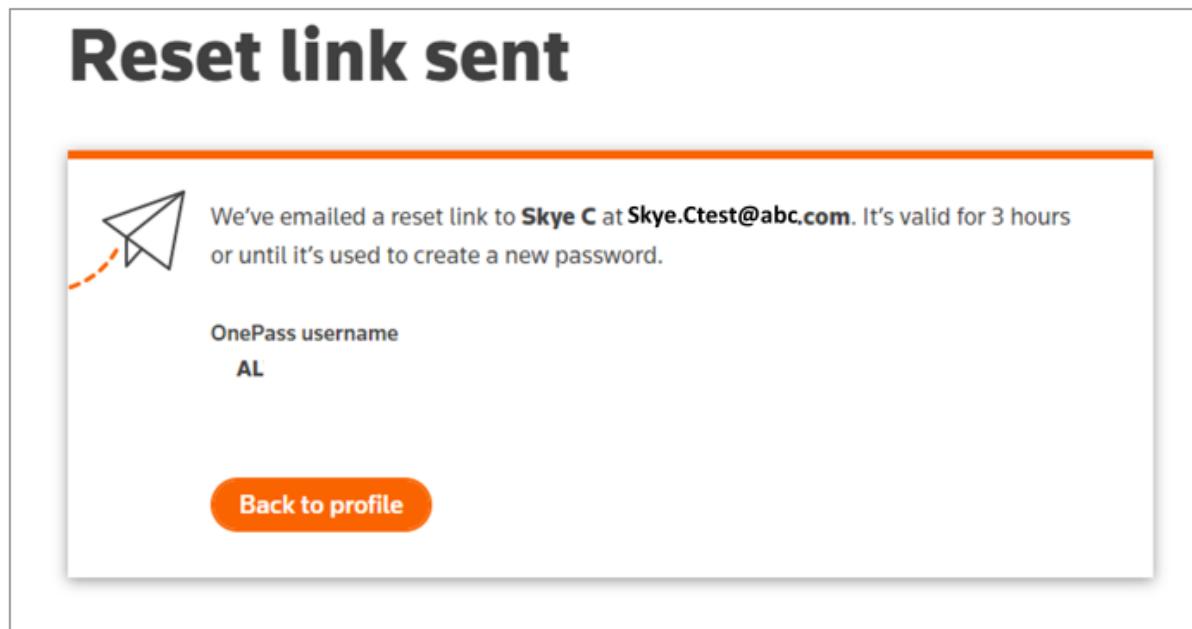
Reset by

Sending a link to their associated email

Generating a temporary password to send them

**Continue** Back

After 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

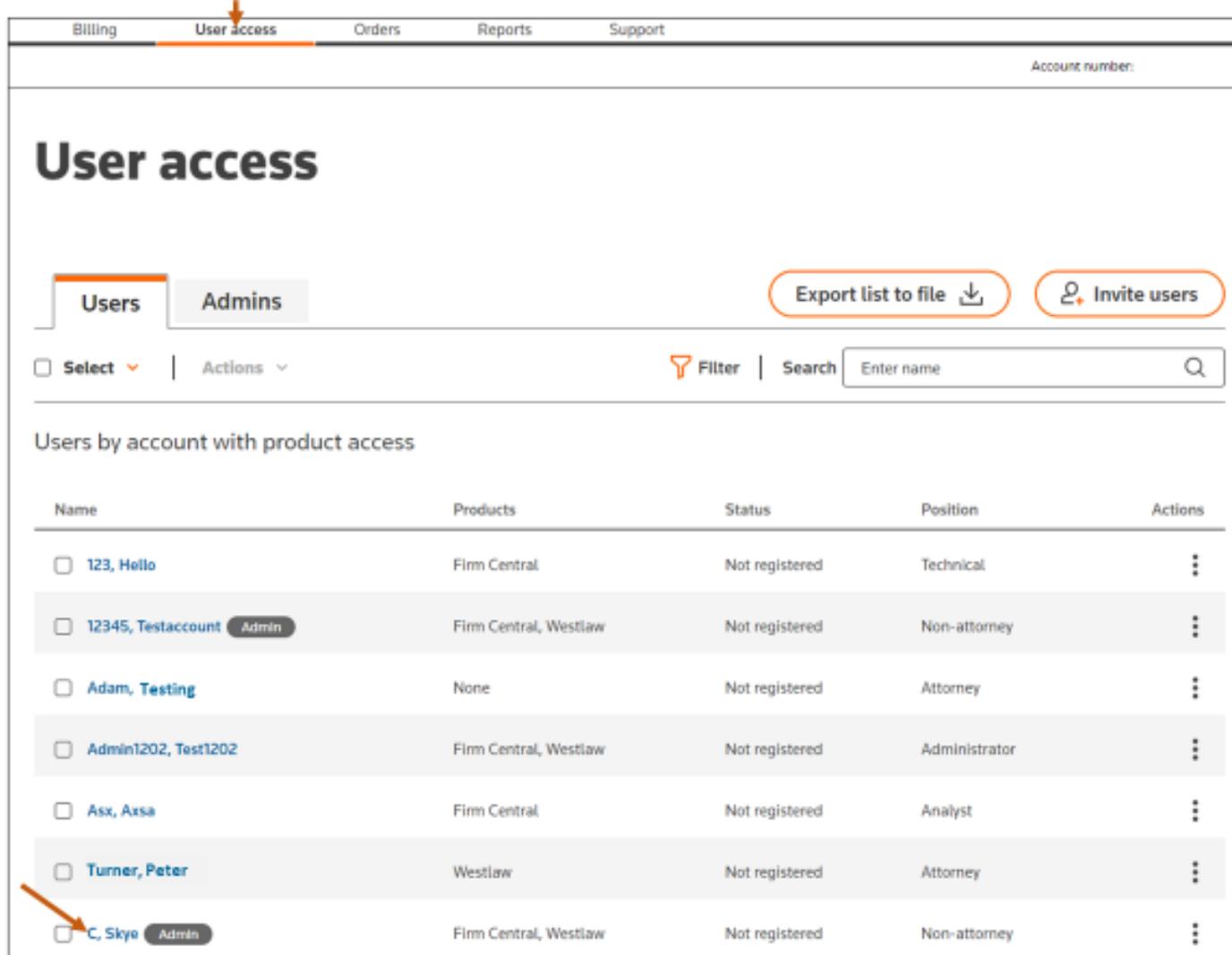
AL

**Back to profile**

## Edit Product Access (Add/Remove Product Access)

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

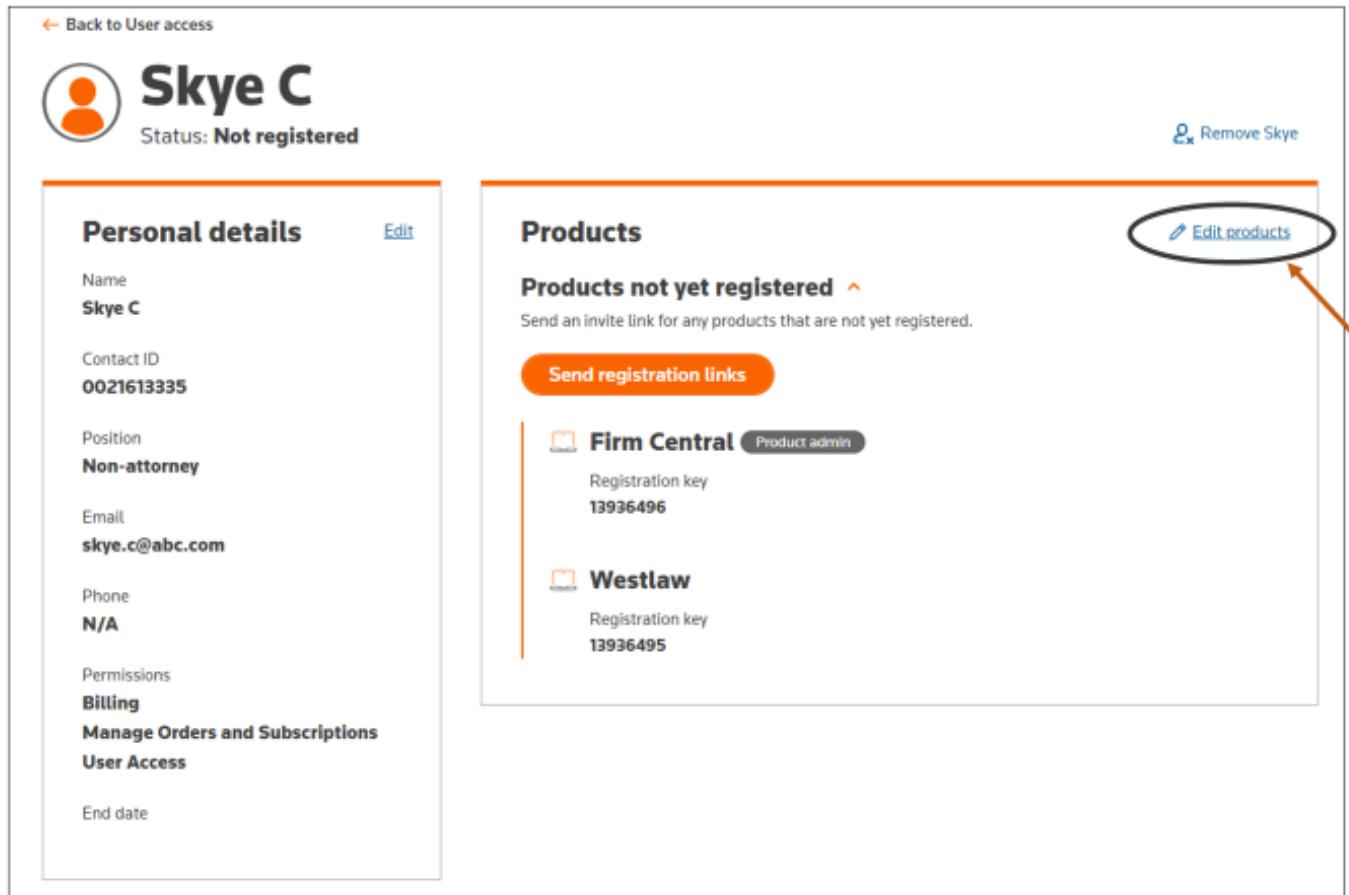
- 1) Navigate to the **User access** tab and click on the user whose product access you want to update.



The screenshot shows the 'User access' tab selected in the top navigation bar. The main content area is titled 'User access' and contains a table of users. The table has columns for Name, Products, Status, Position, and Actions. The 'Actions' column includes a checkbox for each user. An orange arrow points to the checkbox for the user 'C, Skye Admin'. Another orange arrow points to the 'User access' tab in the navigation bar.

Name	Products	Status	Position	Actions
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, Axsaa	Firm Central	Not registered	Analyst	⋮
Turner, Peter	Westlaw	Not registered	Attorney	⋮
C, Skye Admin	Firm Central, Westlaw	Not registered	Non-attorney	⋮

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



← Back to User access

# Skye C

Status: **Not registered**

**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**

**Products not yet registered** [^](#)

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

[Send registration links](#)

**Firm Central** Product admin

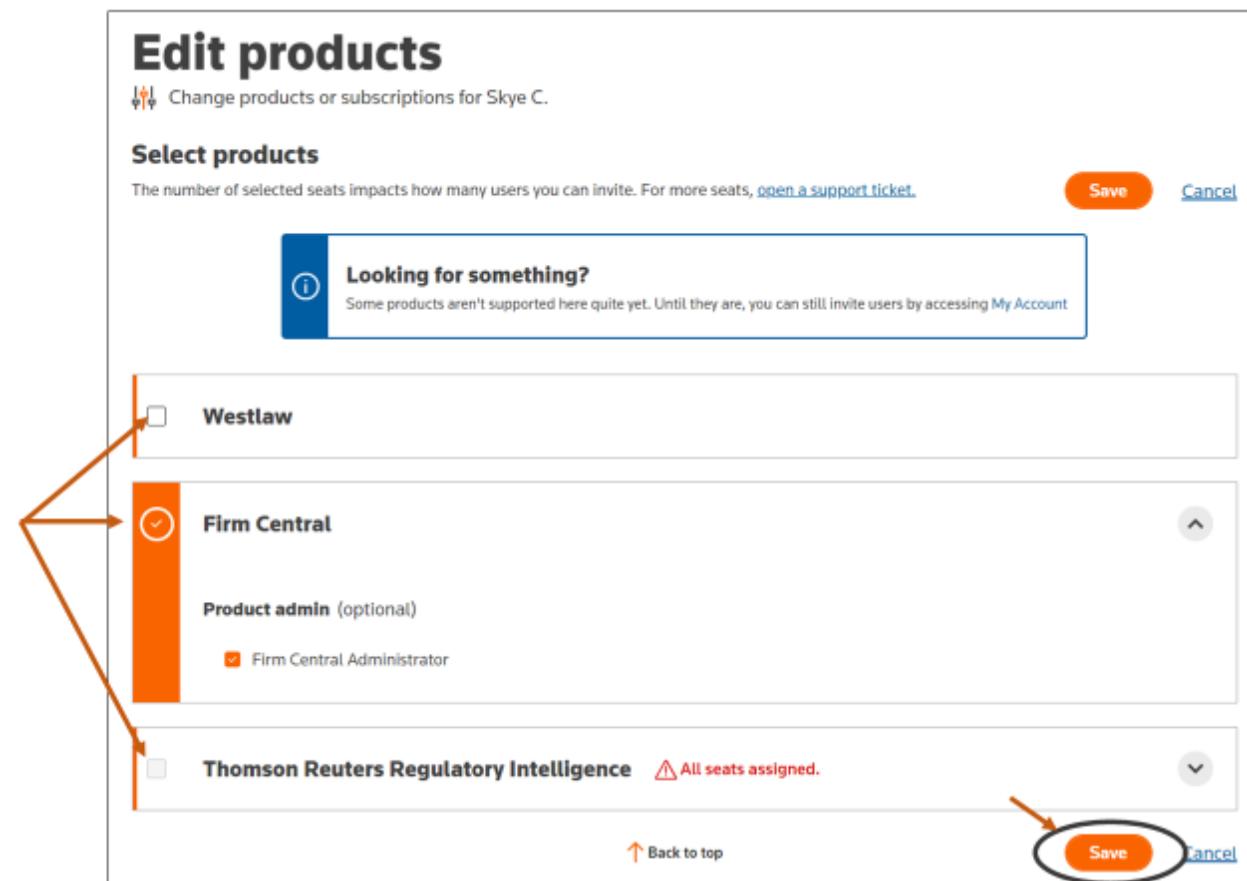
Registration key  
**13936496**

**Westlaw**

Registration key  
**13936495**

[Edit products](#)

Then, select or deselect any product(s) access you want to add or remove 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](#).

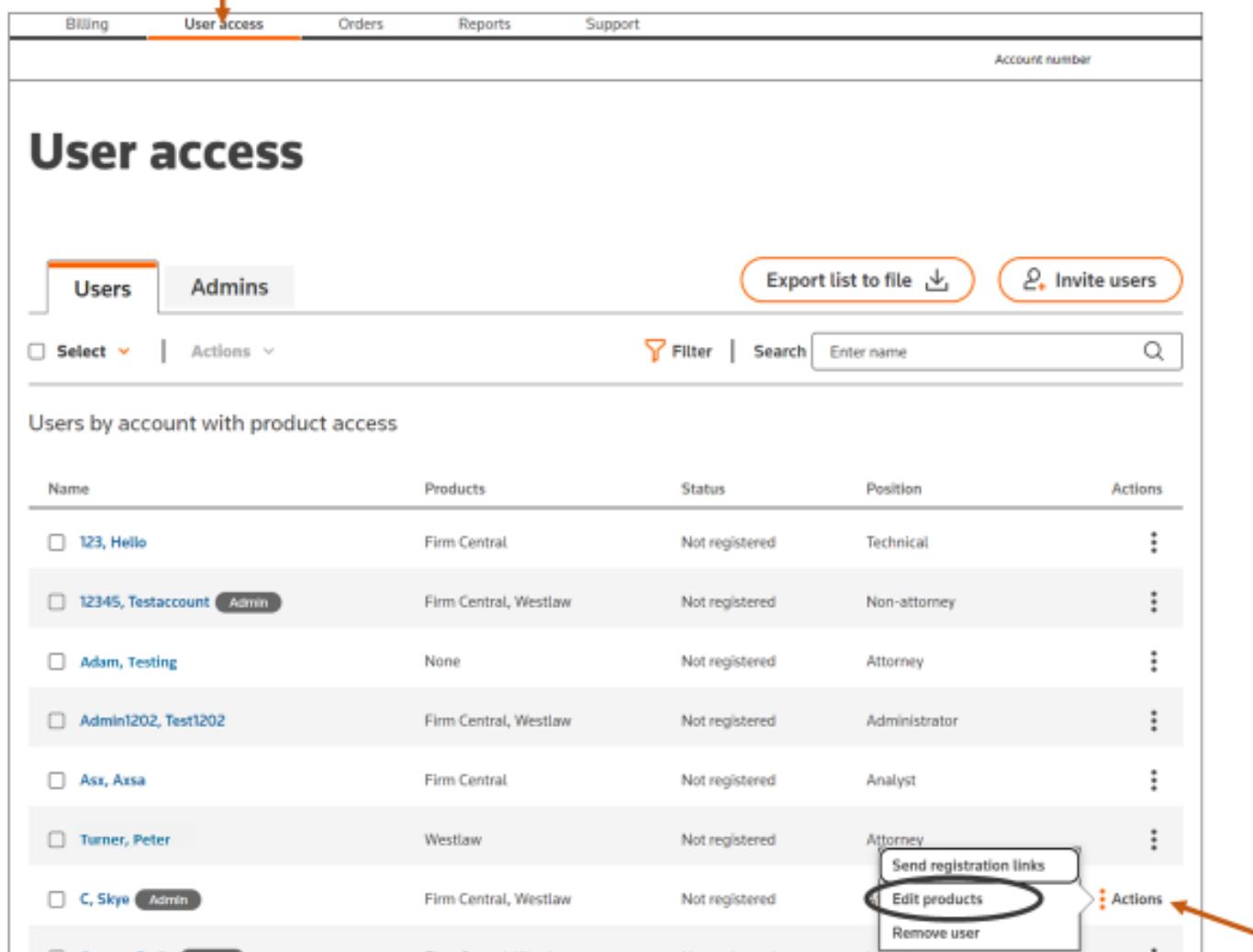
**Looking for something?**  
Some products aren't supported here quite yet. Until they are, you can still invite users by accessing [My Account](#).

<input type="checkbox"/> Westlaw
<b>Firm Central</b>
Product admin (optional)
<input checked="" type="checkbox"/> Firm Central Administrator
<input type="checkbox"/> Thomson Reuters Regulatory Intelligence <span style="color: red;">⚠ All seats assigned.</span>

[Back to top](#)

**Save** **Cancel**

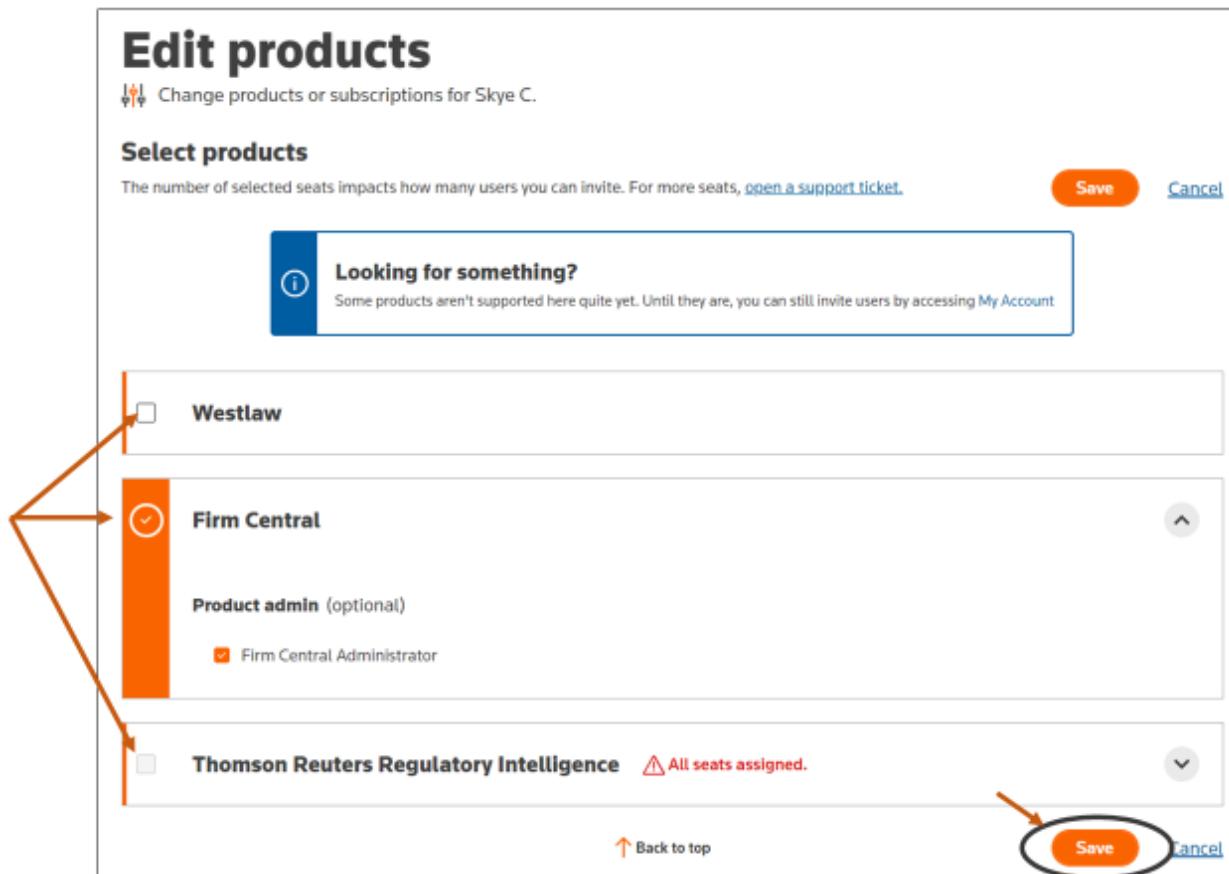
2) Navigate to the **User access** tab. Click on the three dots under the **Actions** tab for the user whose product access you want to change. Then, select **Edit products**.



The screenshot shows the 'User access' tab selected in the navigation bar. The main content area displays a table of users with columns for Name, Products, Status, Position, and Actions. An 'Actions' menu is open for the user 'C, Skye Admin', showing options: 'Send registration links', 'Edit products' (which is circled in red), and 'Remove user'. A red arrow points to the 'Edit products' option.

Name	Products	Status	Position	Actions
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, Asxa	Firm Central	Not registered	Analyst	...
Turner, Peter	Westlaw	Not registered	Attorney	...
C, Skye Admin	Firm Central, Westlaw	Not registered	Actions	<div style="border: 1px solid #ccc; padding: 5px; display: inline-block;">         Send registration links  <b>Edit products</b>          Remove user       </div>

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



**Edit products**  
Change products or subscriptions for Skye C.

**Select products**

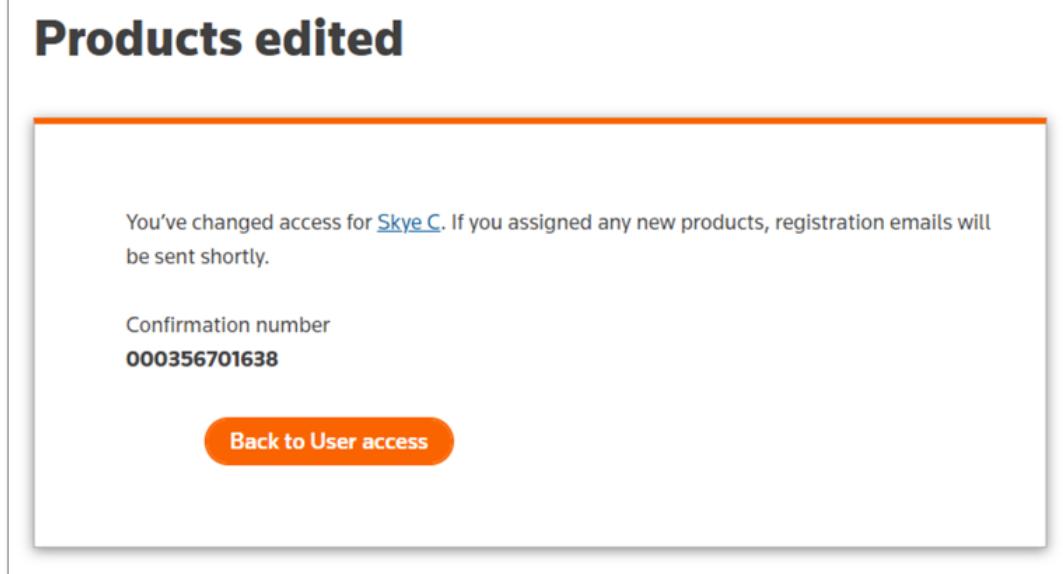
The number of selected seats impacts how many users you can invite. For more seats, [open a support ticket](#).

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

<input type="checkbox"/> Westlaw
<input checked="" type="checkbox"/> Firm Central
<b>Product admin (optional)</b>
<input checked="" type="checkbox"/> Firm Central Administrator
<input type="checkbox"/> Thomson Reuters Regulatory Intelligence <span style="color: red;">⚠ All seats assigned.</span>

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

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



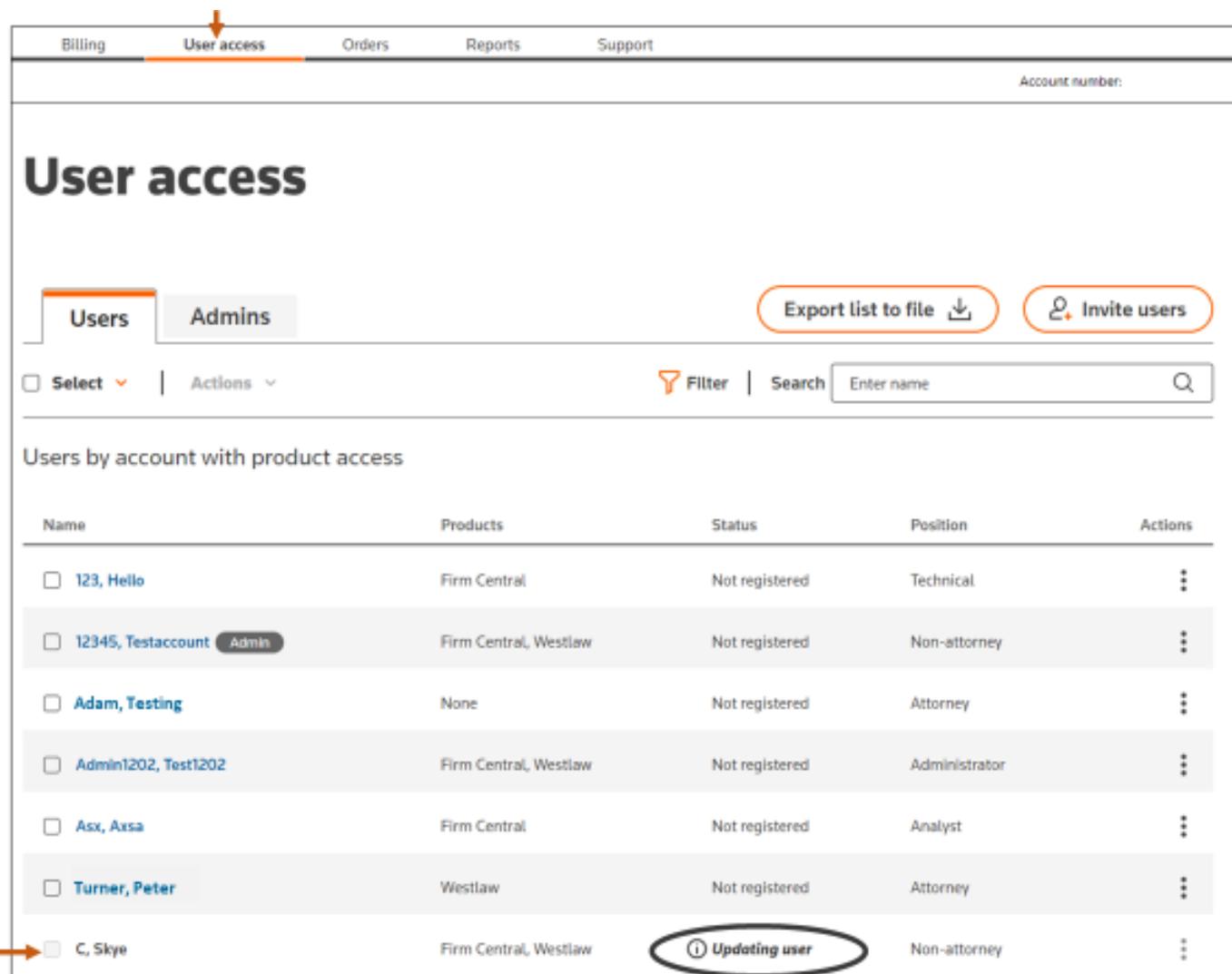
**Products edited**

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' tab selected in the navigation bar. The main content area displays a table of users with product access. The table has columns for Name, Products, Status, Position, and Actions. One row, for 'C, Skye', has a status cell circled with the text 'Updating user'. A red arrow points to the 'User access' tab, and another red arrow points to the 'Updating user' status cell.

Name	Products	Status	Position	Actions
123, Hello	Firm Central	Not registered	Technical	⋮
12345, Testaccount <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">Admin</span>	Firm Central, Westlaw	Not registered	Non-attorney	⋮
Adam, Testing	None	Not registered	Attorney	⋮
Admin1202, Test1202	Firm Central, Westlaw	Not registered	Administrator	⋮
Asx, Asxa	Firm Central	Not registered	Analyst	⋮
Turner, Peter	Westlaw	Not registered	Attorney	⋮
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**.

The screenshot shows the 'Support' tab selected in the top navigation bar. The 'Submit a ticket' button is highlighted with a black oval and an orange arrow. The 'Open tickets' tab is selected, showing a message: 'You don't have any open tickets.' The 'Resolved tickets' tab is also visible. On the right, there is a 'Quick links' sidebar with links to Westlaw Edge Training, Westlaw Classic Training, Practical Law Training, and Knowledge Center.

**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 open tickets.

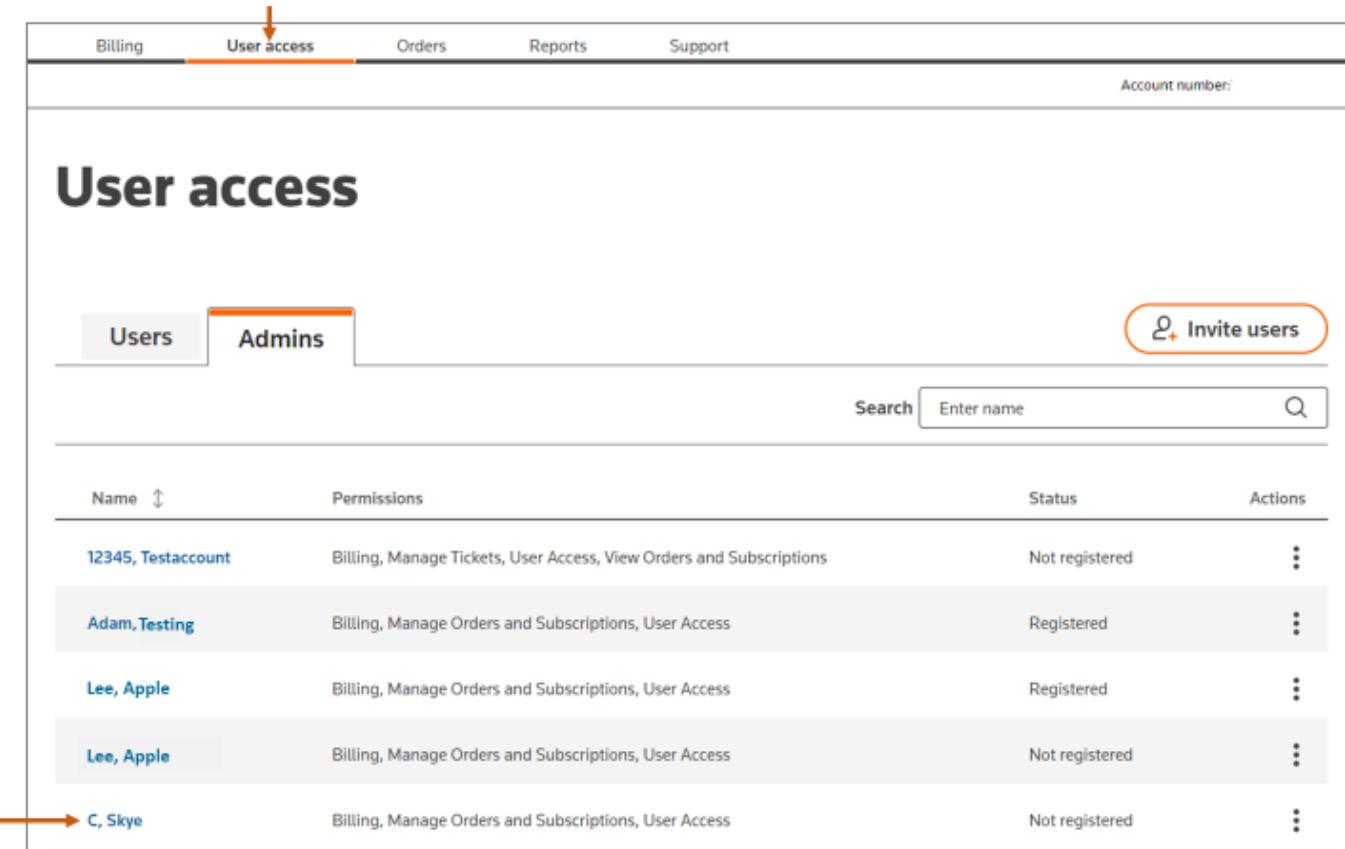
Quick links

- Westlaw Edge Training
- Westlaw Classic Training
- Practical Law Training
- Knowledge Center

## 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 Admins tab selected. The table lists users 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	⋮
<b>C, Skye</b>	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

<b>Personal details</b> <a href="#">Edit</a>		<b>Products</b> <a href="#">Edit products</a>
Name <b>Skye C</b>	Contact ID <b>0021613335</b>	<b>Products not yet registered</b> <a href="#">Send registration links</a>
Position <b>Non-attorney</b>		 <b>Firm Central</b> <small>Product admin</small> Registration key <b>13936496</b>
Email <b>skye.c@abc.com</b>		 <b>Westlaw</b> Registration key <b>13936495</b>
Phone <b>N/A</b>		
Permissions <b>Billing</b>		
<b>Manage Orders and Subscriptions</b>		
<b>User Access</b>		
End date		

125

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

← Back to User access

# Skye C

Status: Not registered

**Personal details**

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

**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**

**Remove Skye**

**Edit products**

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

[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: 0021613335  
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 Subscriptions

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: 19956498-

**Westlaw**  
Registration key: 19956499-

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

# Personal details edited

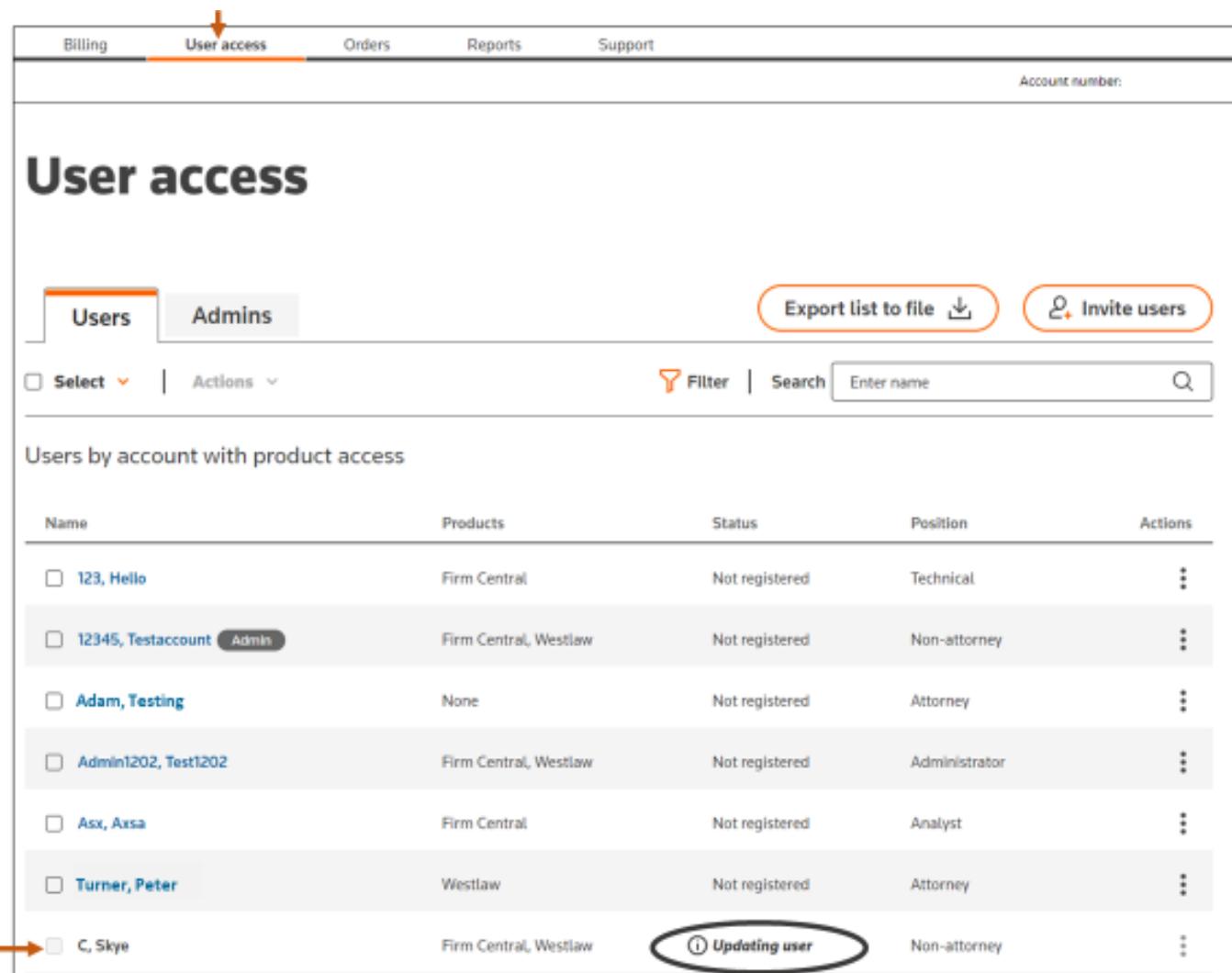


You've changed the personal details for **Skye C.**  
It may take up to 15 minutes for these changes to appear in the user profile.

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.

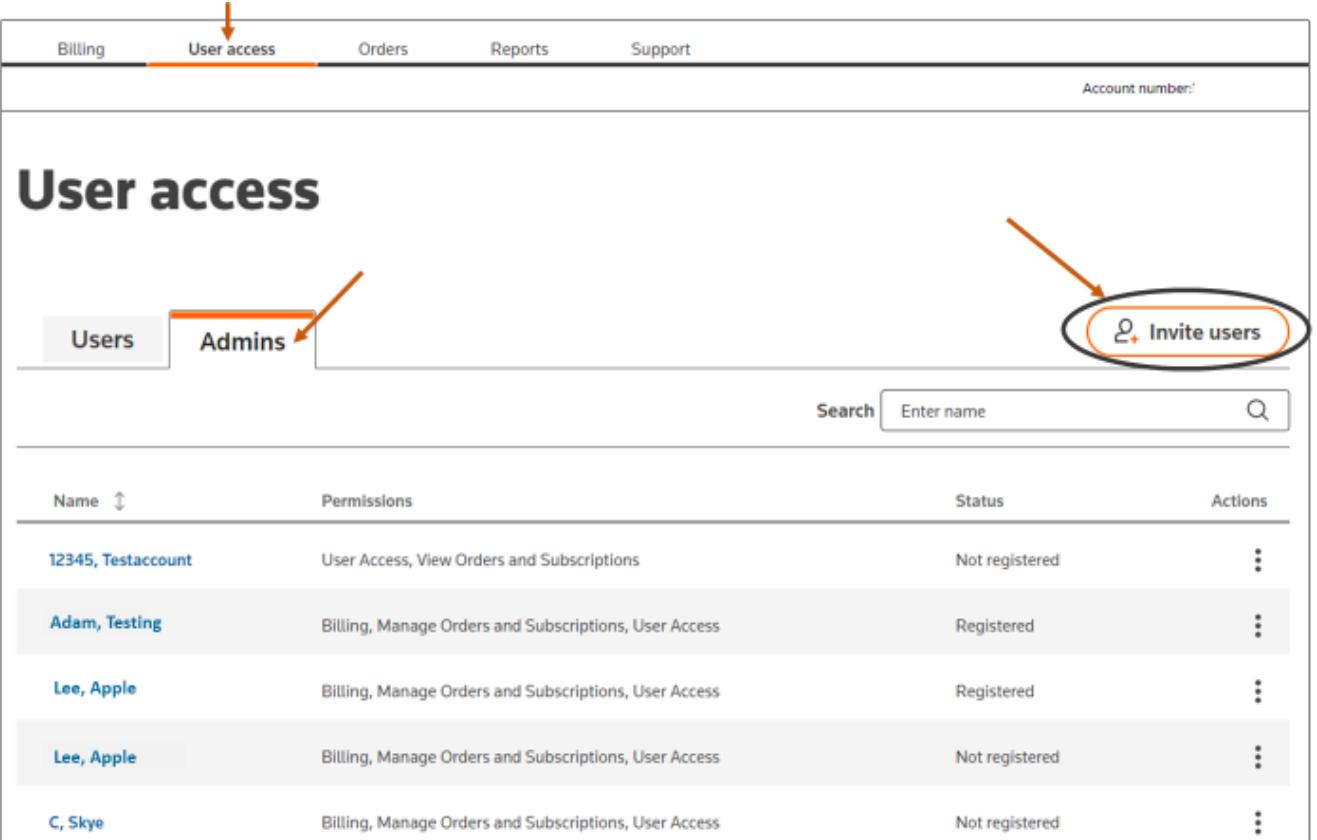


The screenshot shows the 'User access' tab selected in the top navigation bar. The page displays a list of users with various details like name, products, status, and position. The last row, for 'C, Skye', has a status of 'Updating user' and is circled in red. A red arrow points to the 'User access' tab at the top of the page.

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

## Add Administrator Users

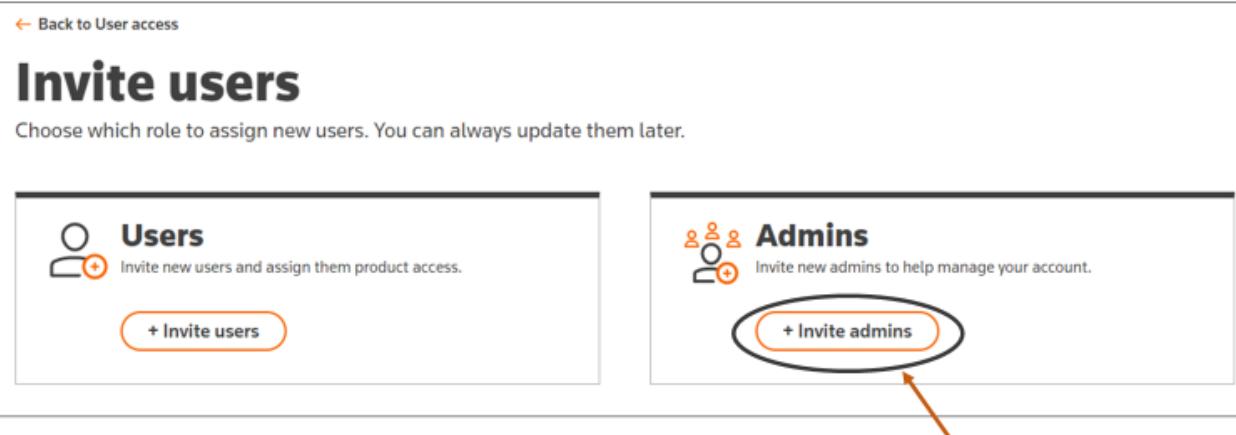
Navigate to the **User access** tab. Next, click the **Admins** tab. Then, click **Invite users**.



The screenshot shows the 'User access' tab selected in the top navigation bar. The 'Admins' tab is highlighted with a red arrow. The 'Invite users' button is circled with a red oval and has a red arrow pointing to it.

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	...

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



The screenshot shows the 'Invite users' page. The 'Admins' section is highlighted with a red arrow. The '+ Invite admins' button is circled with a red oval and has a red arrow pointing to it.

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   
① 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**

**Permissions**

**Choose permissions**

- 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

**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
Sadie	P	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**

First name	Last name	Permissions
Sadie	P	Billing, User Access, Manage...

Email: sadie.ad@slc.com

---

**Contact 2**

First name	Last name	Permissions
		Choose permissions

Enter a first name.

Email:

---

[+ Add another user](#)

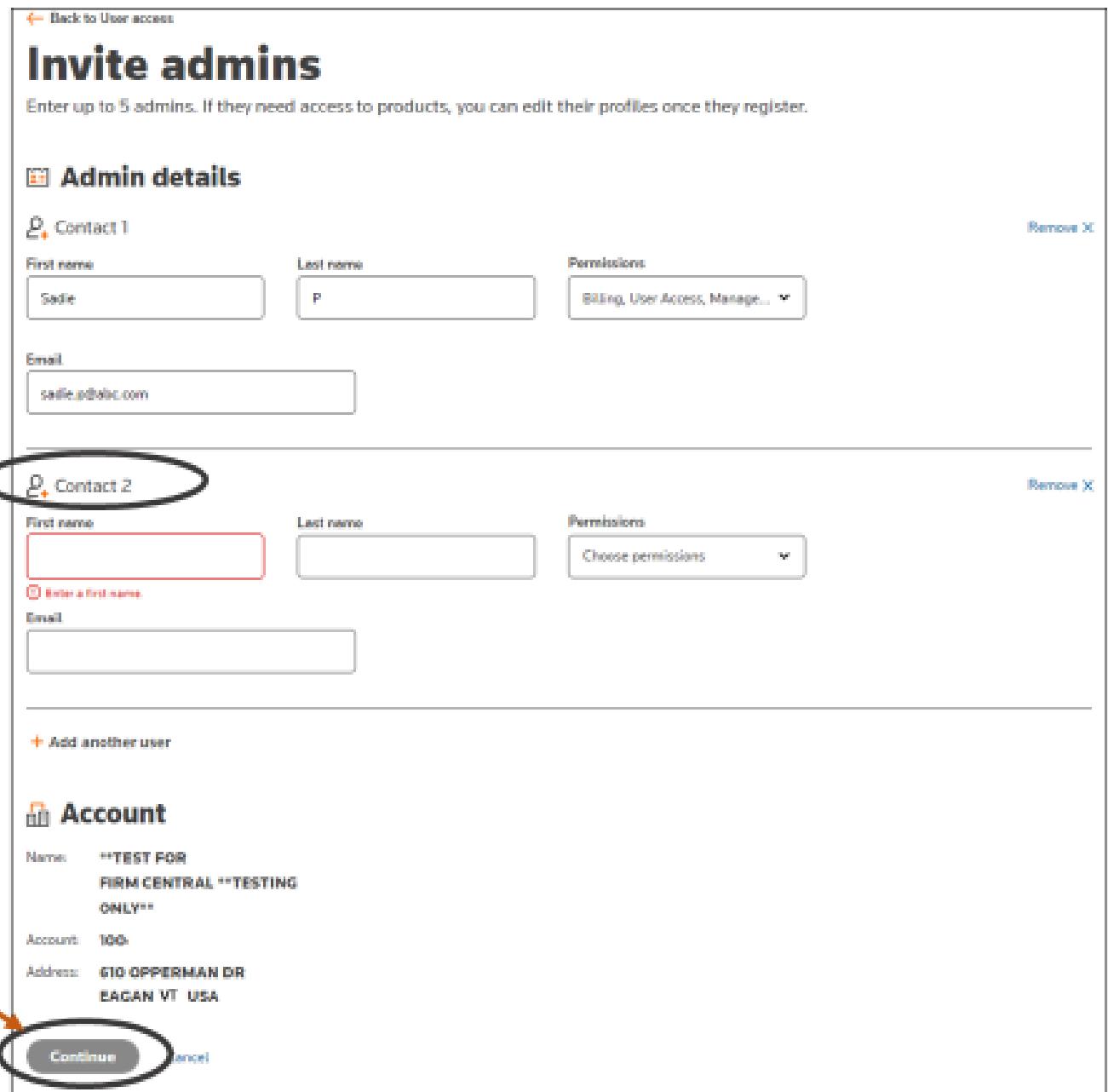
**Account**

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

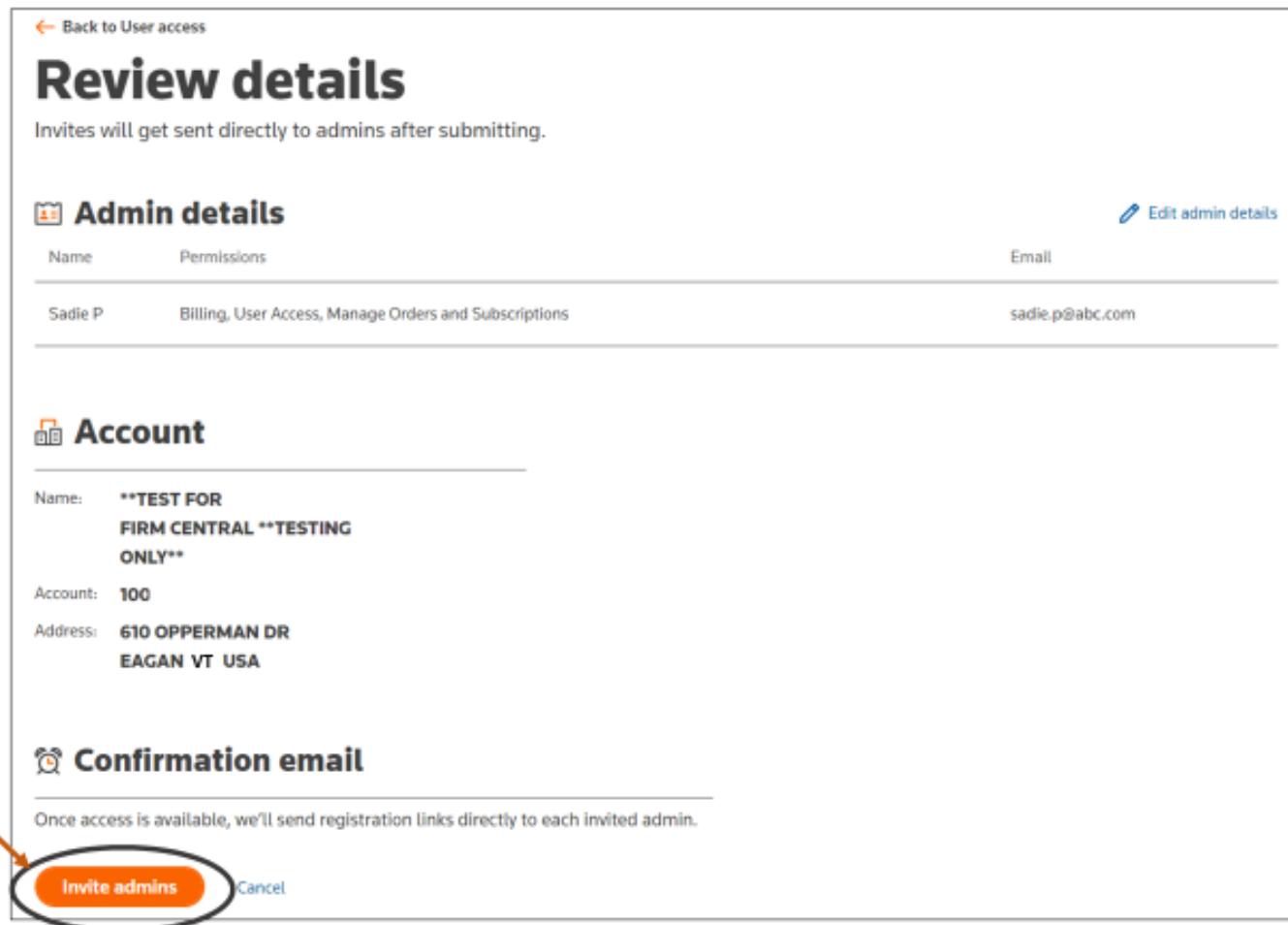
Account: 100

Address: 610 OPPERMAN DR  
EAGAN VT USA

**Continue** [Cancel](#)



Then, click **Invite admins**.



Back to User access

## Review details

Invites will get sent directly to admins after submitting.

### 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**

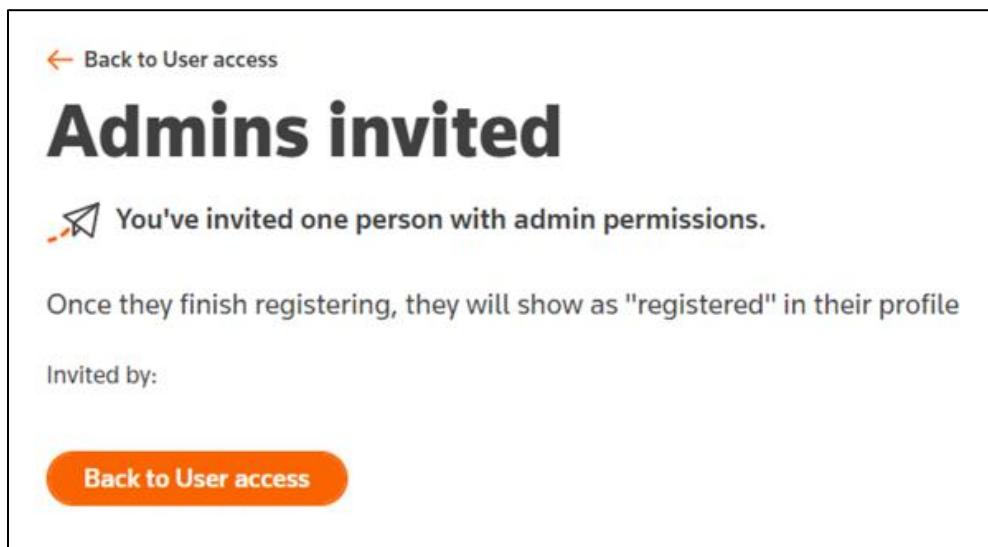
Address: **610 OPPERMAN DR  
EAGAN VT USA**

### 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**

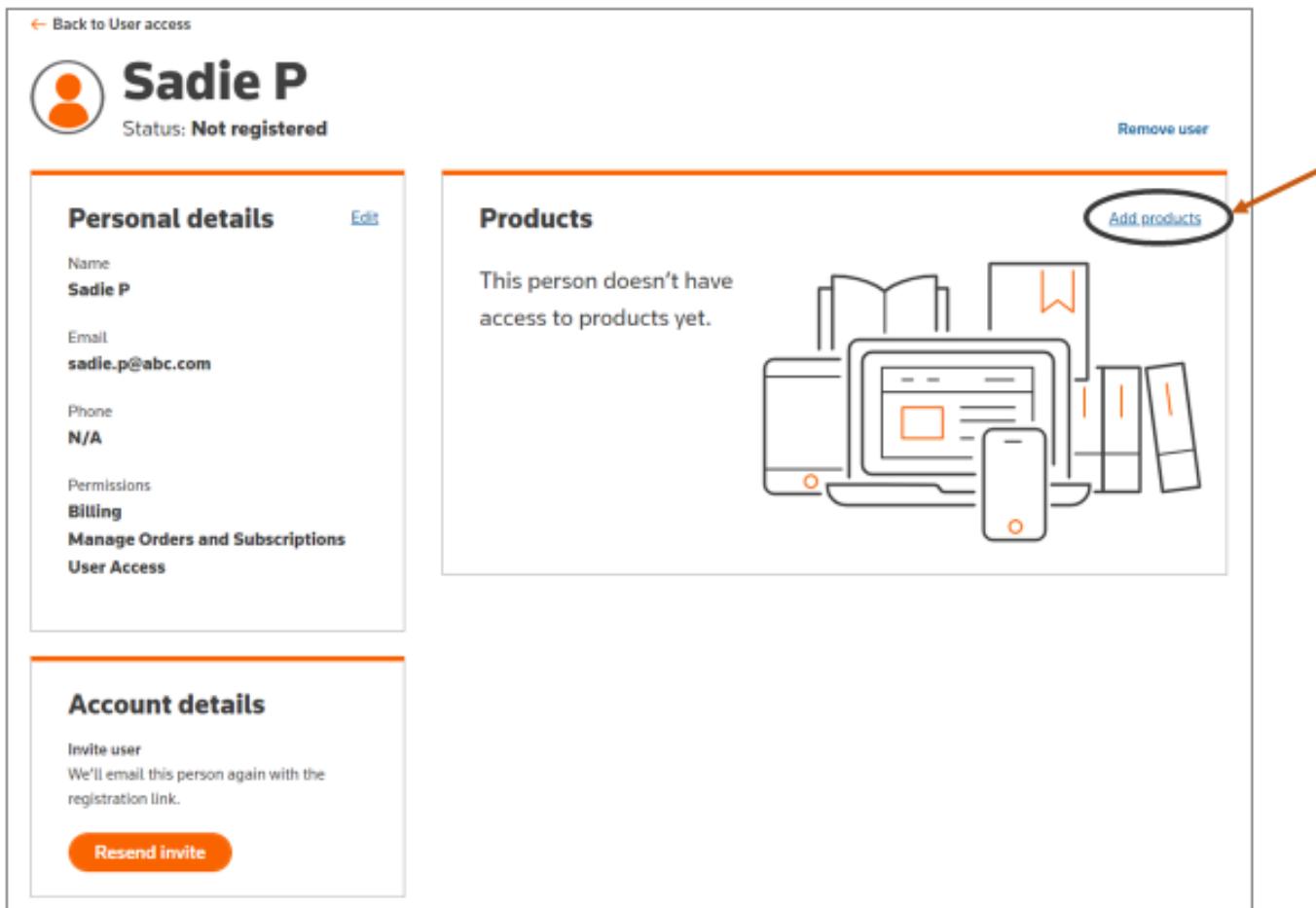
If you navigate back to the **User access** tab, you will see a blue box notification that a new user was added. Also, you can see the new user listed under the **Admins** tab.

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

- Header:** Billing, User access (highlighted with a red arrow), Orders, Subscriptions, Reports, Support. An account number is also present.
- Section Header:** User access
- Notification:** A blue box with the text "Added 1 admin" and a message: "It can take up to 10 minutes for all systems to reflect this." with a "Dismiss X" button.
- Tab Navigation:** Users (selected), Admins (highlighted with a red arrow).
- Search Bar:** Search, Enter name, magnifying glass icon.
- Table:** A list of users with columns: Name, Permissions, Status, Actions. The table includes the following rows:

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	⋮
CSPOA, Alice	Billing, Manage Orders and Subscriptions, User Access	Not registered	⋮
Circe, Elle	Billing, Manage Orders and Subscriptions, User Access	Registered	⋮
Dorn, Robert	Billing, Manage Orders and Subscriptions, User Access	Not registered	⋮
Iesthat, apple	Billing	Not registered	⋮
Morton, Cally	Manage Orders and Subscriptions	Registered	⋮
R. Sadi	Billing, Manage Orders and Subscriptions, User Access	Not registered	⋮

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



← Back to User access

# Sadie P

Status: Not registered

**Personal details** [Edit](#)

Name  
**Sadie P**

Email  
**sadie.p@abc.com**

Phone  
**N/A**

Permissions

**Billing**

**Manage Orders and Subscriptions**

**User Access**

**Products**

This person doesn't have access to products yet.

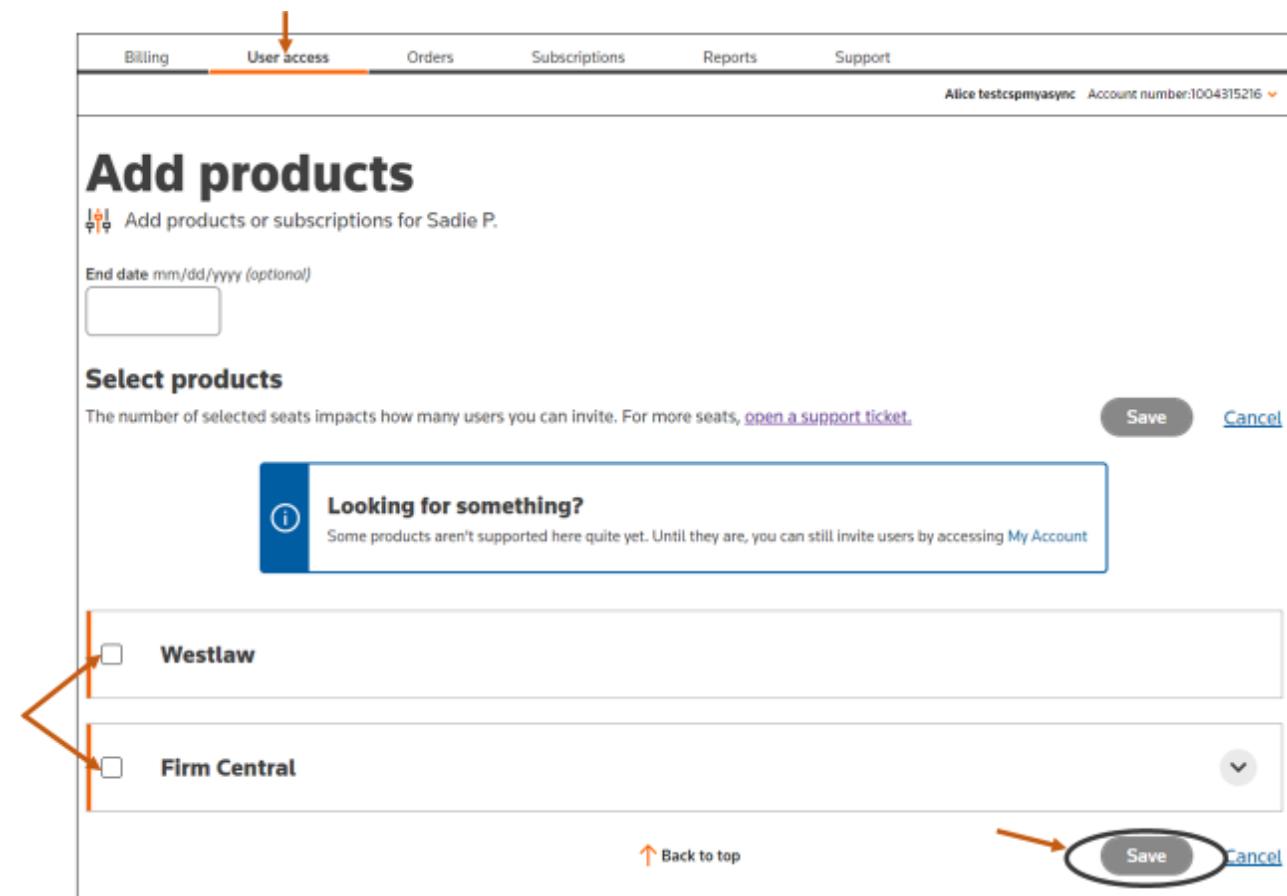
**Add products**

**Account details**

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

**Resend invite**

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



Billing User access Orders Subscriptions Reports Support

Alice testcspmyasync Account number:1004315216 ▾

## Add products

Add products or subscriptions for Sadie P.

End date mm/dd/yyyy (optional)

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](#)

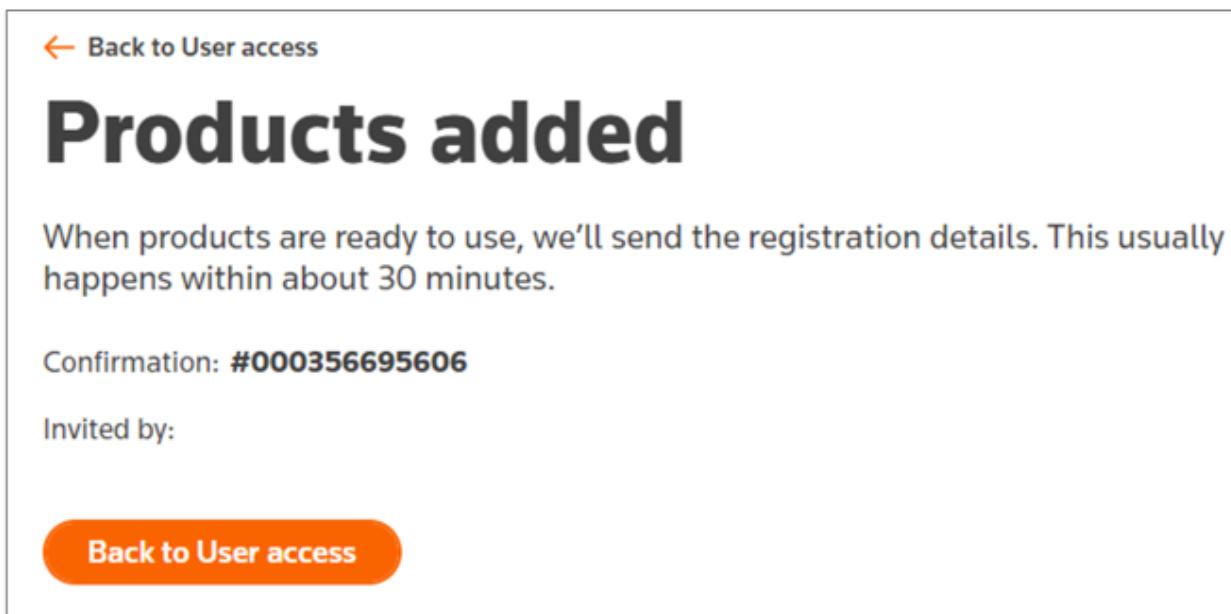
Westlaw

Firm Central

[Back to top](#)

**Save** **Cancel**

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



[← Back to User access](#)

## Products added

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

Confirmation: #000356695606

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.

The screenshot shows the 'User access' tab selected in the top navigation bar. A blue notification box at the top center says 'Added 1 user' with a dismiss button. Below it, the 'Users' tab is selected in a navigation bar. The main area shows a table of users with columns: Name, Products, Status, Position, and Actions. A new user, 'P. Sodie', is listed at the bottom of the table, highlighted with a red arrow. The 'Adding user' status is circled in red. The 'Admins' tab is also visible in the navigation bar.

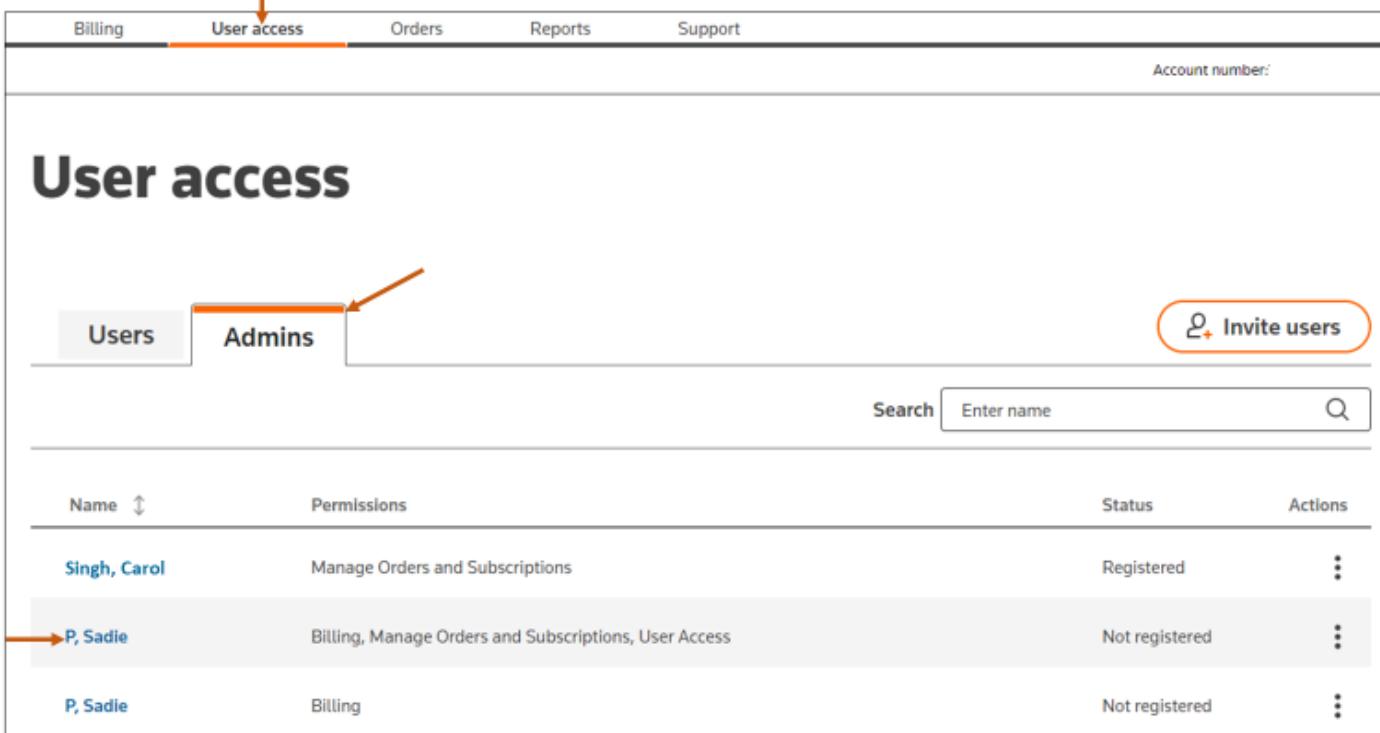
Name	Products	Status	Position	Actions
Florham, Erik	None	Not registered	Administrator	...
Corley, Scott	Westlaw	Not registered	Non-attorney	...
Lee, Apple	Westlaw	Not registered	Contractor	...
Newuser@email.com, Alice	None	Not registered	Attorney	...
P. Sodie	Westlaw	Not registered	Contractor	...
Prodjanvel, Alice3	Finn Central, Westlaw	Not registered	Attorney	...
Products, Multiple	Westlaw	Not registered	Non-attorney	...
P. Sodie	Westlaw	Adding user	Non-attorney	...

### 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 the self-service portal. At the top, there are tabs for 'Billing', 'User access' (which is highlighted with an orange arrow), 'Orders', 'Reports', and 'Support'. Below the tabs, there is a search bar with the placeholder 'Account number:' and a 'User access' heading. Under the heading, there are two tabs: 'Users' (disabled) and 'Admins' (highlighted with an orange arrow). To the right of the tabs is a button labeled 'Invite users' with an orange outline. Below the tabs, there is a search bar with the placeholder 'Enter name' and a magnifying glass icon. The main content area displays a table with columns: 'Name' (sorted by 'Last name'), 'Permissions', 'Status', and 'Actions'. The table contains three rows:

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

Name  
**Sadie P**

Email  
**sadie.p@abc.com**

Phone  
**N/A**

Permissions

**Billing**

**Manage Orders and Subscriptions**

**User Access**

[Edit](#)

### Products

[Add products](#)

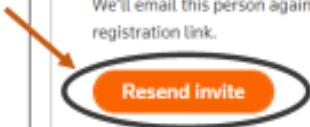
This person doesn't have access to products yet.



### 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.

[← 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**

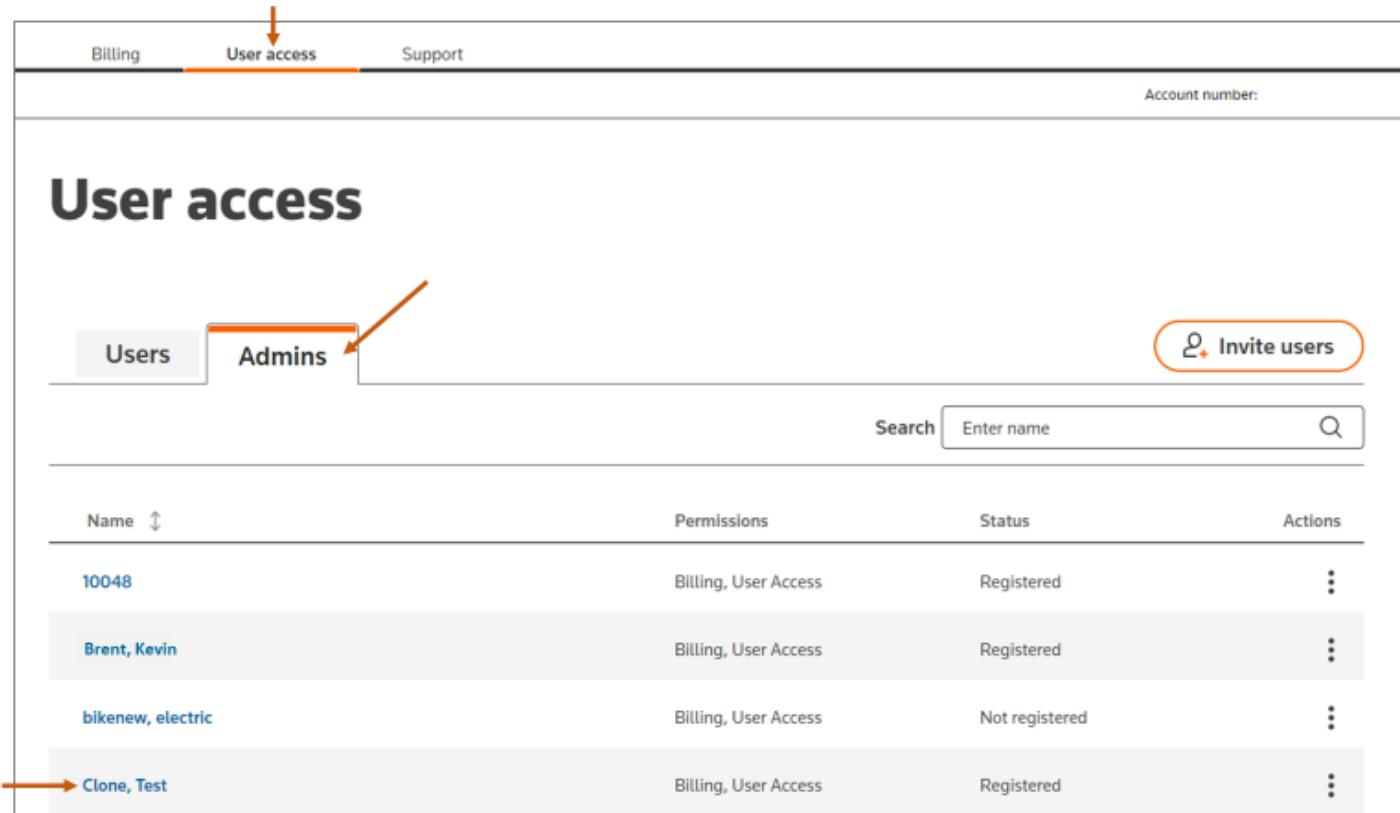
[Invite user](#)  
We'll email this person again with the registration link.

 **Invite sent** [X](#)



## Reset Password for an Admin User

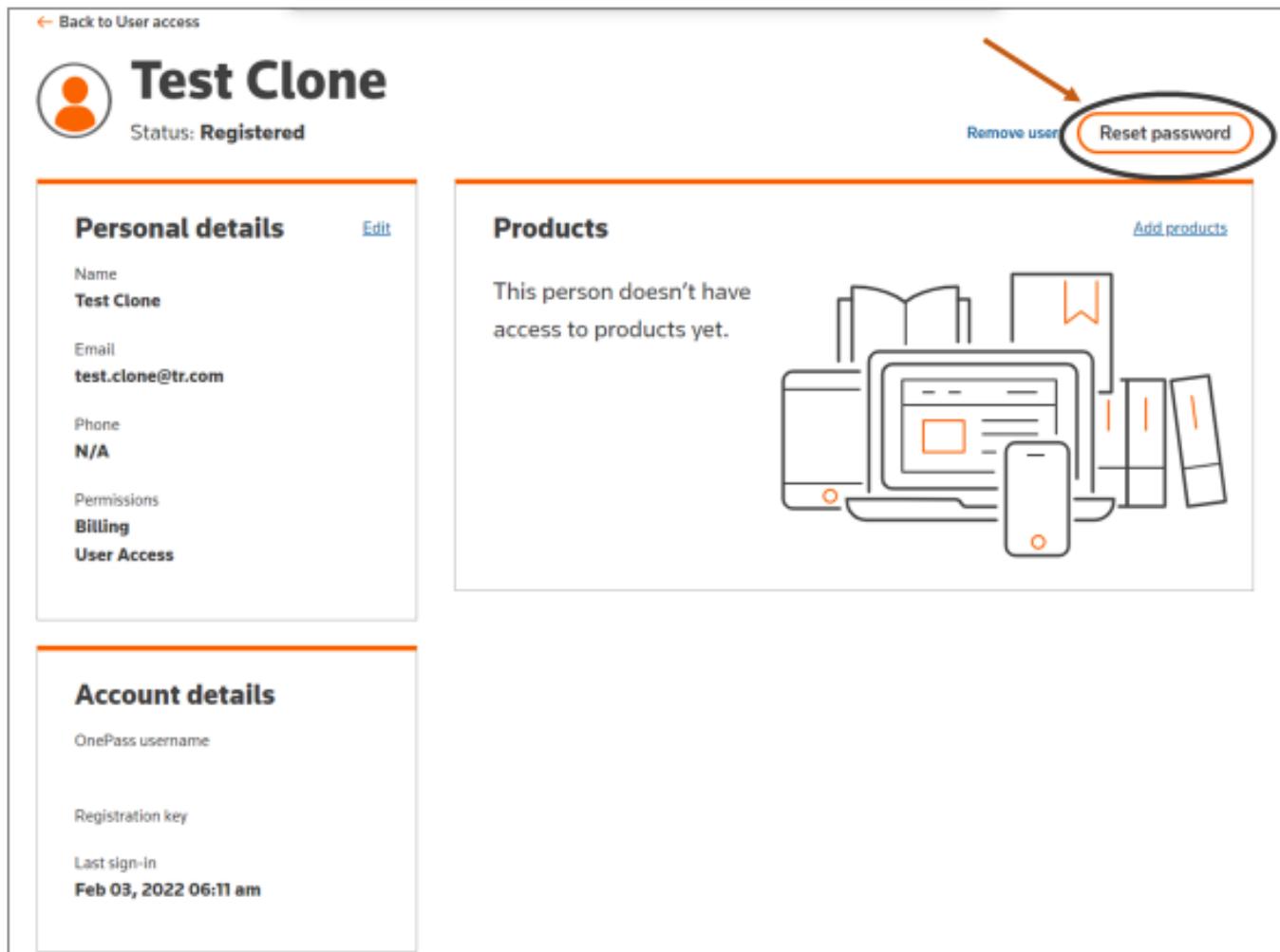
Navigate to the **User access** tab and select the **Admins** tab. Next, click the admin user's name.



The screenshot shows the 'User access' section of the portal. At the top, there are three tabs: 'Billing', 'User access' (which is highlighted with an orange arrow), and 'Support'. Below the tabs, there is a search bar with the placeholder 'Account number:' and a 'Search' button. The main area is titled 'User access' and contains two tabs: 'Users' and 'Admins' (which is highlighted with an orange arrow). To the right of these tabs is a button labeled 'Invite users'. Below the tabs is a search bar with the placeholder 'Enter name' and a magnifying glass icon. The main content area is a table with the following columns: 'Name' (sorted by 'Name'), 'Permissions', 'Status', and 'Actions'. The table contains five rows of data. The first row is for user '10048' with permissions 'Billing, User Access' and status 'Registered'. The second row is for user 'Brent, Kevin' with the same permissions and status. The third row is for user 'bikenew, electric' with the same permissions and status. The fourth row is for user 'Clone, Test' with the same permissions and status. Each row has a three-dot 'Actions' menu icon on the right. An orange arrow points to the 'Clone, Test' row.

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

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



← Back to User access

## Test Clone

Status: Registered

**Personal details** [Edit](#)

Name: Test Clone

Email: test.clone@tr.com

Phone: N/A

Permissions: Billing, User Access

**Products** [Add products](#)

This person doesn't have access to products yet.

**Account details**

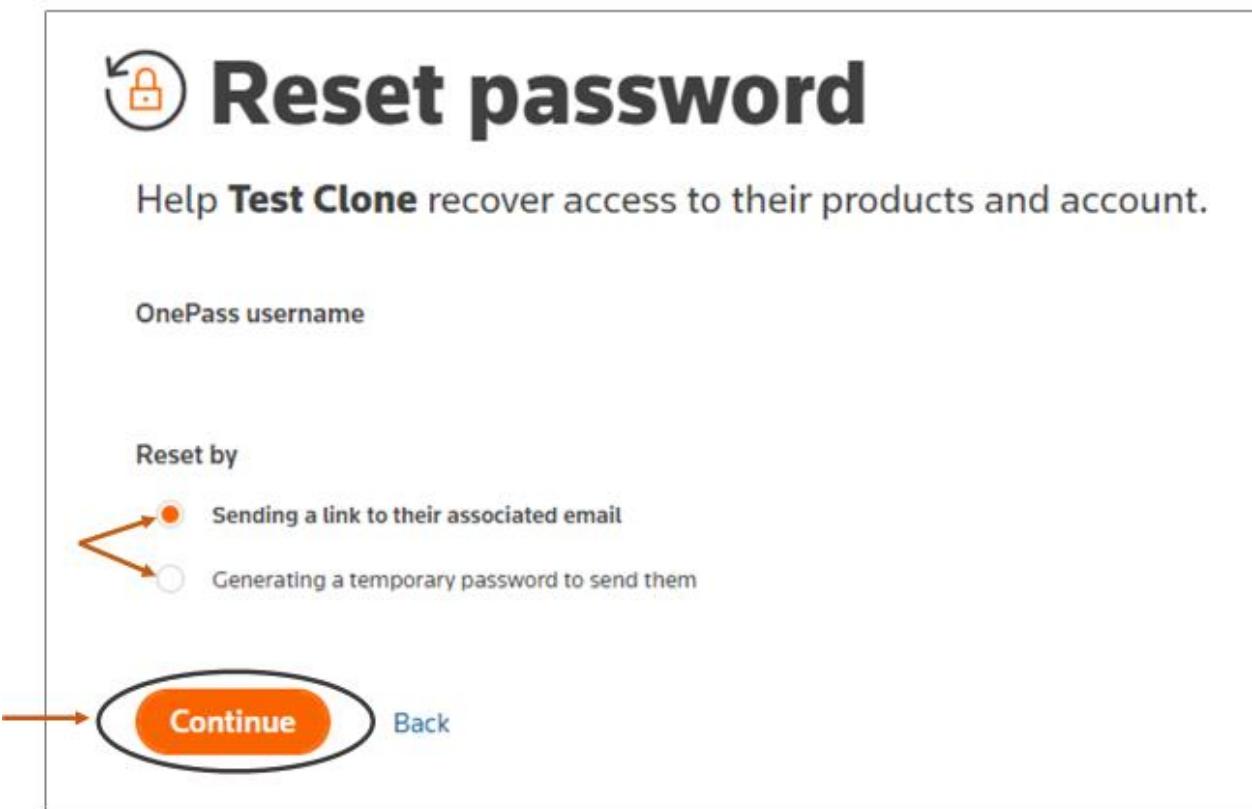
OnePass username

Registration key

Last sign-in: **Feb 03, 2022 06:11 am**

Remove user **Reset password**

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**.



## 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**.

Print Orders

Order number

Go

**!** Additional order management functionalities will be coming soon. In the meantime, please go to [My Account](#) to view your full list of orders.

Then, view the Print Order details.

Print Orders / 0205

## Order 020500000 details

 Shipping and payment information

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

**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

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

**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

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

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

## Starting a return on order 020500000

For each title you want to return, tell us how many you're sending and why.

1 item eligible for return in this order

Item	Ordered	Returning	Reason for return
TRG CA PRACTICE ALTERNATIVE DISPUTE RESOLUTION CH6-8 2021 CONTENT	2	<input type="button" value="0"/> <input type="button" value="-"/> <input type="button" value="+"/>	Select a reason

[Create return label](#) [Return policy](#)

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**.

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

## Starting a return on order 020500000

For each title you want to return, tell us how many you're sending and why.

1 item eligible for return in this order

Item	Ordered	Returning	Reason for return
TRG CA PRACTICE ALTERNATIVE DISPUTE RESOLUTION CH6-8 2021 CONTENT	2	<input type="button" value="0"/> <input type="button" value="-"/> <input type="button" value="1"/> <input type="button" value="+"/>	<div style="border: 1px solid #ccc; padding: 5px; display: inline-block;"><input type="button" value="Select a reason"/> <ul style="list-style-type: none"><li><input type="checkbox"/> Subscription was cancelled</li><li><input type="checkbox"/> Damaged in transit</li><li><input type="checkbox"/> Duplicate shipment</li><li><input type="checkbox"/> Not ordered</li><li><input type="checkbox"/> Do not need it anymore</li><li><input type="checkbox"/> Not satisfied with the product (has inaccuracies, hard to use, etc)</li></ul></div>

[Create return label](#) [Return policy](#)

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 Box        of         
5230 FRONT BLVD  
SUNNYVALE, AZ 92618

Delivery number: 044  
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

Printed on 07/26/2022 at 2:38:57 pm

Order number 02050000

Delivery number	Description	Returning	Reason
-----------------	-------------	-----------	--------

0441 TRG CA PRACTICE ALTERNATIVE DISPUTE ... 1 Damaged in trans...

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

**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, 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 date. 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

# Order 020500000 details

 Shipping and payment information

Placed on <b>06/19/2022</b>	Ship to <b>TESTING   ACCOUNT PAYABLE 5230 FRONT BLVD SUNNYVALE, AZ 92618</b>	PO Number <b>87</b>
Order status <b>Shipped</b>	Total amount (USD) <b>\$599.09</b>	<a href="#">Start a return</a> <span style="float: right;"><a href="#">Return policy</a></span>

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

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	0	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

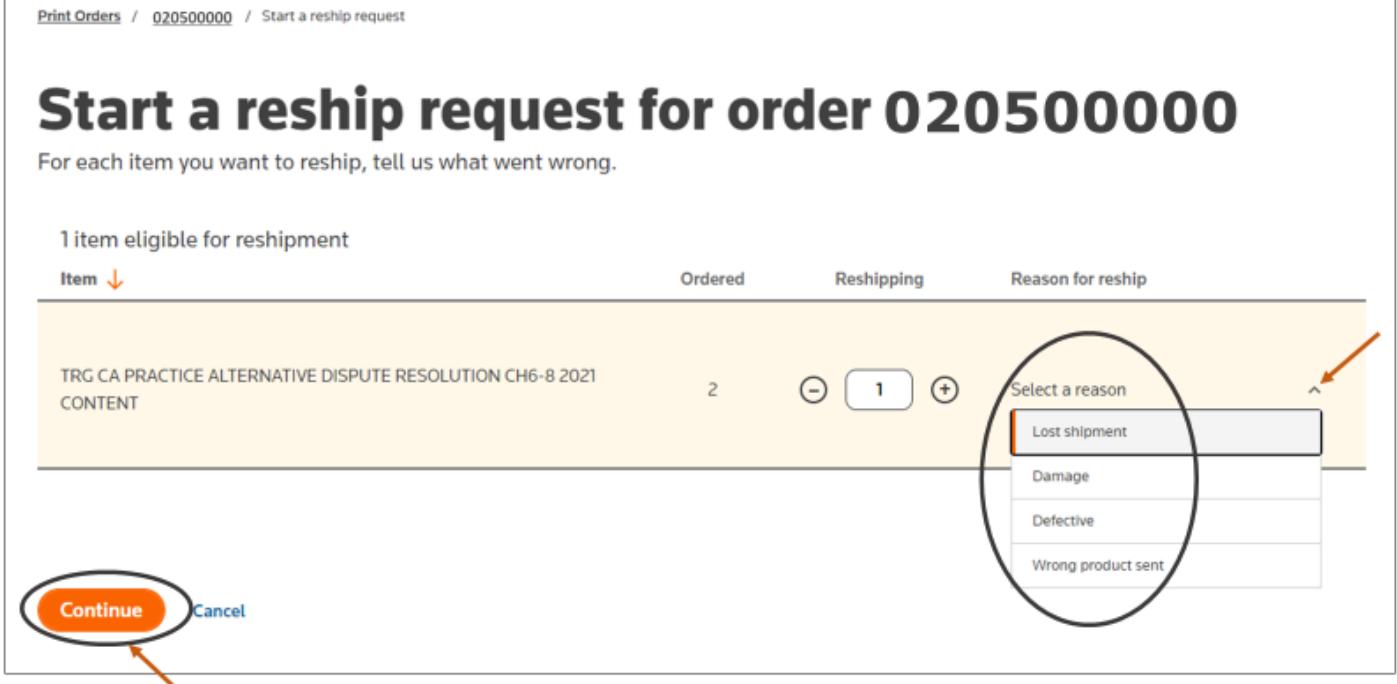
## Start a reship request for order 020500000

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 black; padding: 5px; display: inline-block;"><b>Select a reason</b> Lost shipment Damage Defective Wrong product sent</div>

**Continue** **Cancel**



- Lost shipment
- Damage
- Defective
- Wrong product sent

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

Ship To	Ship Via
TESTING ACCOUNT PAYABLE 5230 FRONT BLVD SUNNYVALE, AZ 92618	U.S. ground service (free) <a href="#">Edit shipping method</a>

[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	 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

### 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	 <a href="#">X Remove</a>

[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

<b>Ship To</b>	<b>Ship Via</b>
TESTING ACCOUNT PAYABLE 5230 FRONT BLVD SUNNYVALE, AZ 92618	U.S. ground service (free) <a href="#">Edit shipping method</a>

[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	 <a href="#">Remove</a>

[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)
TESTING	ACCOUNT PAYABLE
Address line 1	Address line 2 (optional)
5230 FRONT BLVD	
Country	State/province
United States	Arizona
Zip/Postal	City
92618	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

Ship To	Ship Via
TESTING ACCOUNT PAYABLE 5230 FRONT BLVD SUNNYVALE, AZ 92618	U.S. ground service (free) <a href="#">Edit shipping method</a>

[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	 Remove

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

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

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

# Edit shipping method for reship

Original order: **020500000**

## Select a shipping method

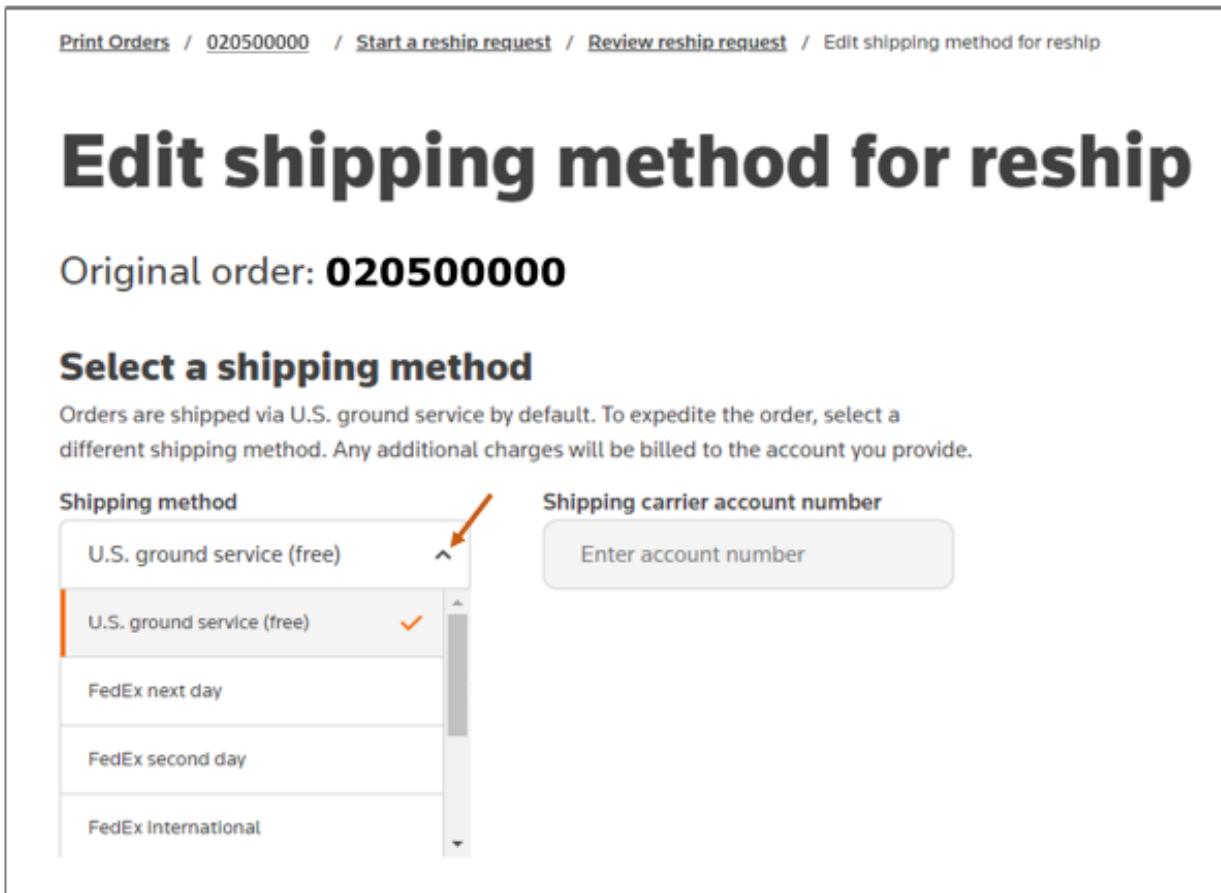
Orders are shipped via U.S. ground service by default. To expedite the order, select a different shipping method. Any additional charges will be billed to the account you provide.

Shipping method

- U.S. ground service (free) 
- U.S. ground service (free) 
- FedEx next day
- FedEx second day
- FedEx international

Shipping carrier account number

Enter account number



Then, click **Save and continue**.

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

# Edit shipping method for reship

Original order: **020500000**

## Select a shipping method

Orders are shipped via U.S. ground service by default. To expedite the order, select a different shipping method. Any additional charges will be billed to the account you provide.

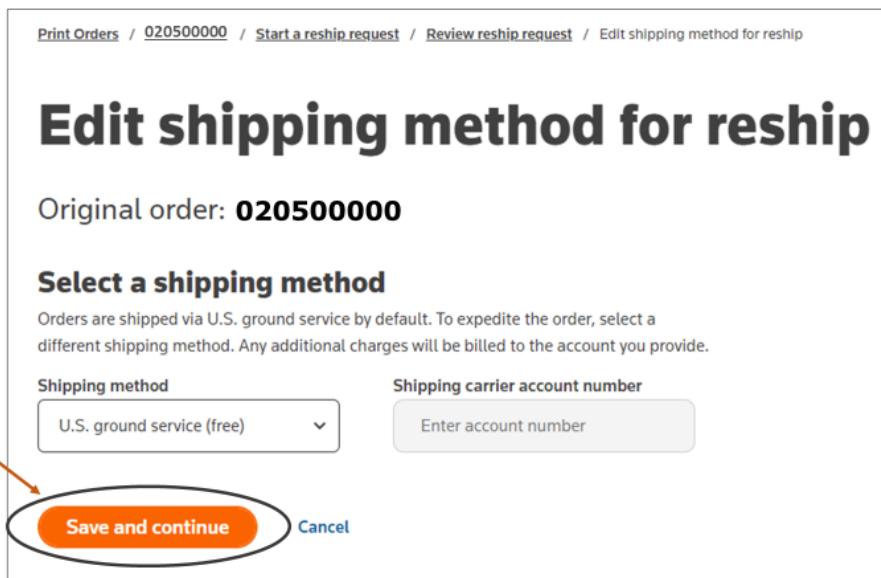
Shipping method

- U.S. ground service (free) 

Shipping carrier account number

Enter account number

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



## REPORTS

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

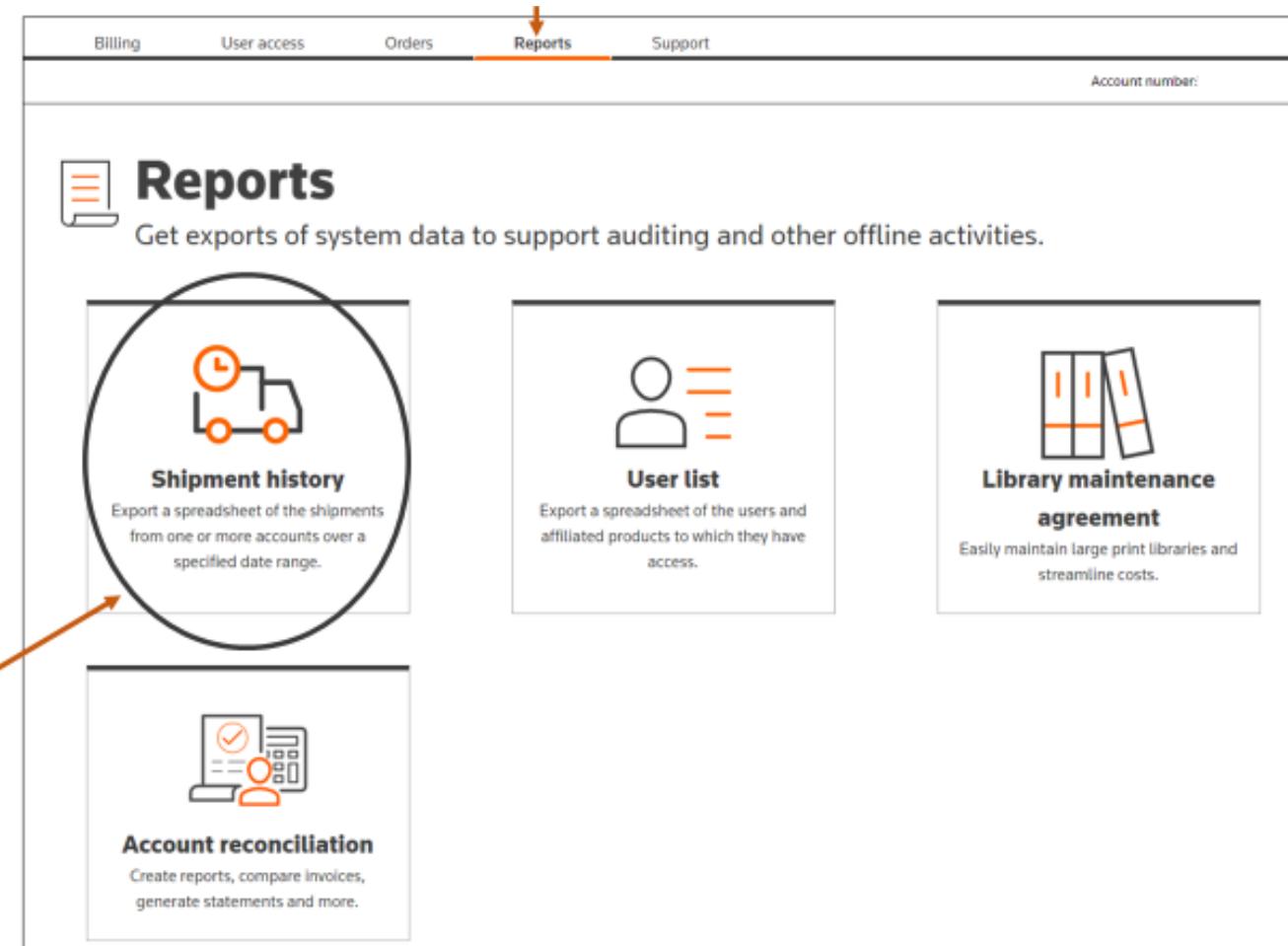
Navigate to the **Reports** tab to obtain various types of reports.

The screenshot shows a navigation bar with tabs: Billing, User access, Orders, Reports (which has a red arrow pointing to it), and Support. Below the navigation bar is a search bar labeled "Account number:". The main content area is titled "Reports" with a document icon. It contains the following sections:

- 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**.



The screenshot shows the 'Reports' tab selected in the top navigation bar. The 'Shipment history' section is highlighted with a red circle and an arrow pointing to it from the left.

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

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

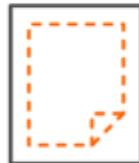
From the Shipment history reports page, click **Create a report**.



## 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.

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.

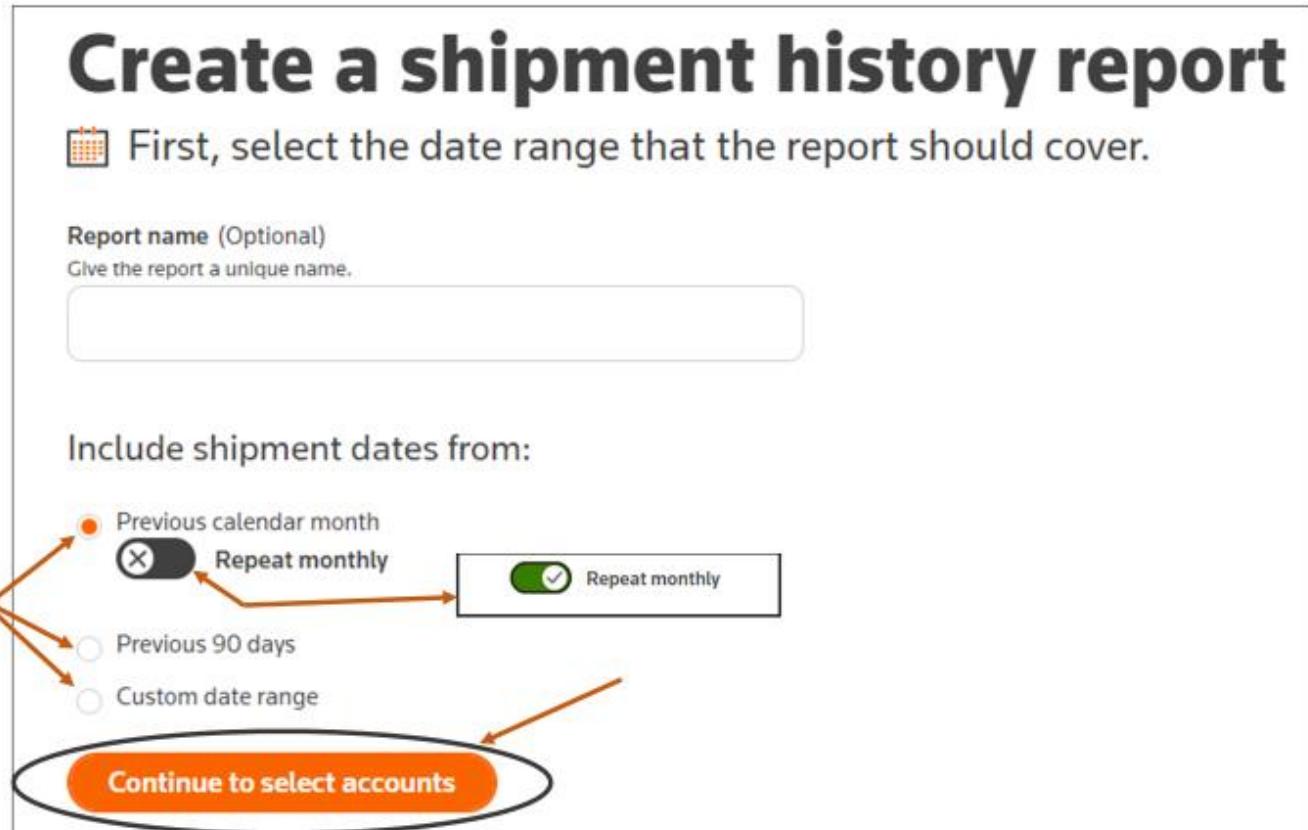
Include shipment dates from:

Previous calendar month  

Previous 90 days

Custom date range

**Continue to select accounts**



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

## Create a shipment history report

Next, select the accounts to pull shipments from.

Available accounts list

1 of 1 selected

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

Viewing 1 - 1

Review report

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**.

## Review your shipment history report

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

Report name **Edit**  
Test1

Date range **Edit**  
Last calendar month  
(From May 02, 2022 to Jun 01, 2022)

Selected accounts **Edit**  
100  
\*\*TEST FOR  
\*\*TESTING ONLY\*\*

Recurring **Edit**  
No

**Save and run report** **Cancel**

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](mailto: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	⋮

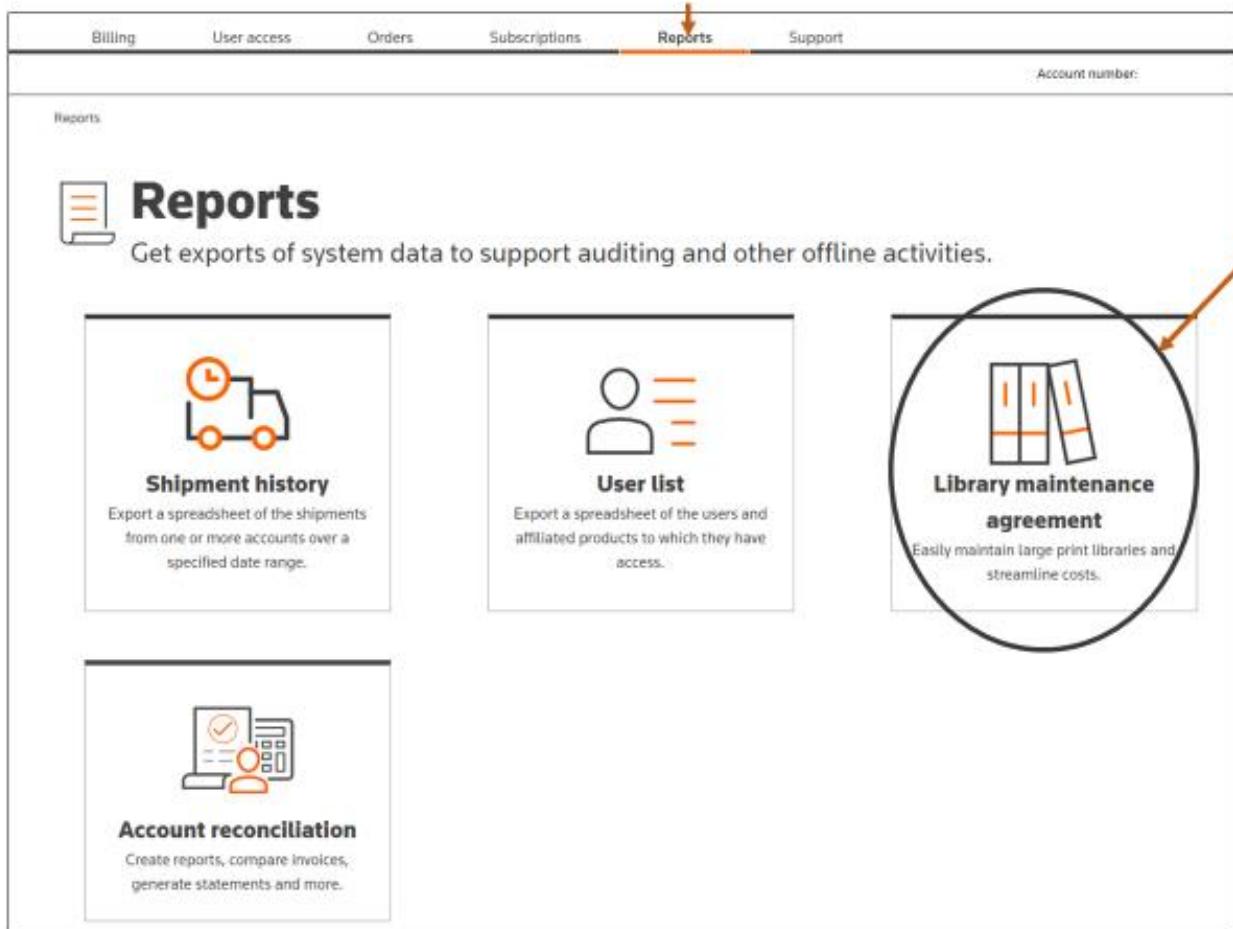
Viewing 1 - 1    Rows per page: 10

## User List Report

See section **View users: Get a Report of Users**.

## Library Maintenance Agreements

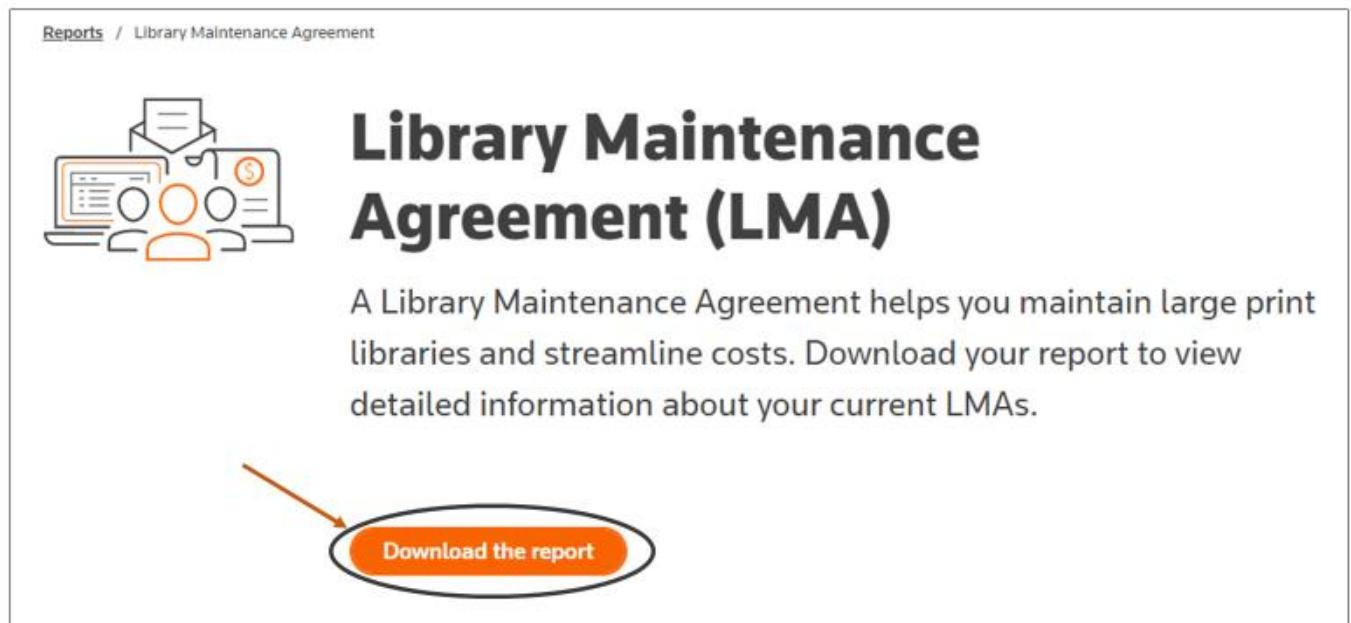
Navigate to the **Reports** tab. Next, click **Library maintenance agreement**.



The screenshot shows a navigation bar with tabs: Billing, User access, Orders, Subscriptions, Reports (which has a red arrow pointing to it), and Support. Below the navigation bar, there is a search bar labeled 'Account number:' and a 'Reports' section. The 'Reports' section has a title 'Reports' with a document icon and a sub-section 'Get exports of system data to support auditing and other offline activities.' Below this, there are four report options: 'Shipment history', 'User list', 'Library maintenance agreement', and 'Account reconciliation'. The 'Library maintenance agreement' option is circled with a red line and has a red arrow pointing to it from the navigation bar.

- 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.

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**.

The screenshot shows the 'Reports' tab selected in the top navigation bar. Below the title 'Reports' is a sub-section titled 'Get exports of system data to support auditing and other offline activities.' This section contains four items:

- 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.

An orange arrow points from the text above to the 'Account reconciliation' section. A black circle highlights this section.

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.

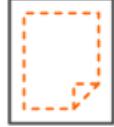
[Reports](#) / Account reconciliation reports

## Account reconciliation reports

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

[Create a report](#)

Available and pending reports



**There are no account reconciliation reports for this account yet.**

To get started, select **Create a report**.

Create an Account Reconciliation Report

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

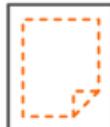
[Reports](#) / Account reconciliation reports

## Account reconciliation reports

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

[Create a report](#)

Available and pending reports



**There are no account reconciliation reports for this account yet.**

To get started, select **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**.

Reports / Account reconciliation reports / Create a reconciliation report

# Create a reconciliation report

 First, fill out the report details.

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

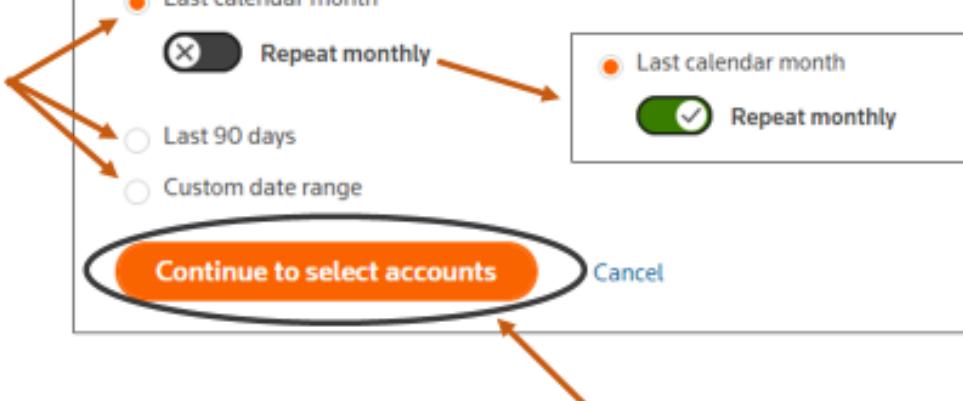
Include shipment dates from:

Last calendar month  Repeat monthly

Last 90 days  Repeat monthly

Custom date range  Repeat monthly

**Continue to select accounts** [Cancel](#)



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

1 of 1 selected

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

**Review report** Cancel



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 <b>Edit</b>	Duration <b>Edit</b>	Recurring <b>Edit</b>
Test	Last calendar month	No
Selected accounts <b>Edit</b>	Jun 01, 2022 to Jun 30, 2022	
100 **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](mailto: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	Actions
Test	Jul 29, 2022	Last calendar month May 31, 2022 to Jun 29, 2022	Pending	

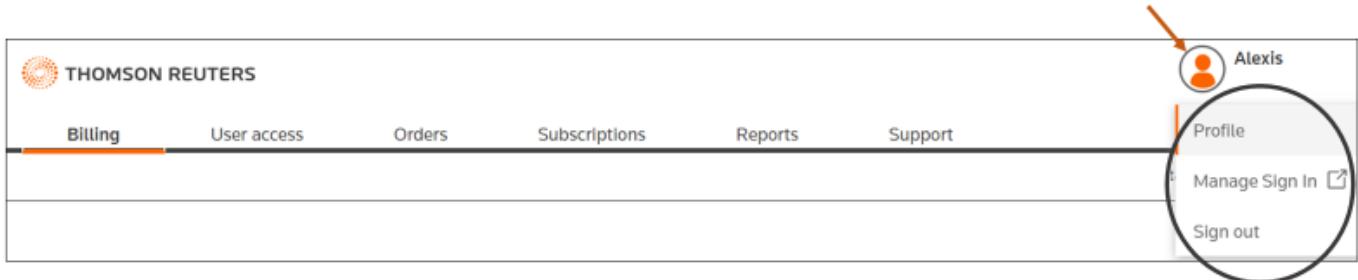
Viewing 1 - 1

Rows per page

## MANAGE YOUR PROFILE

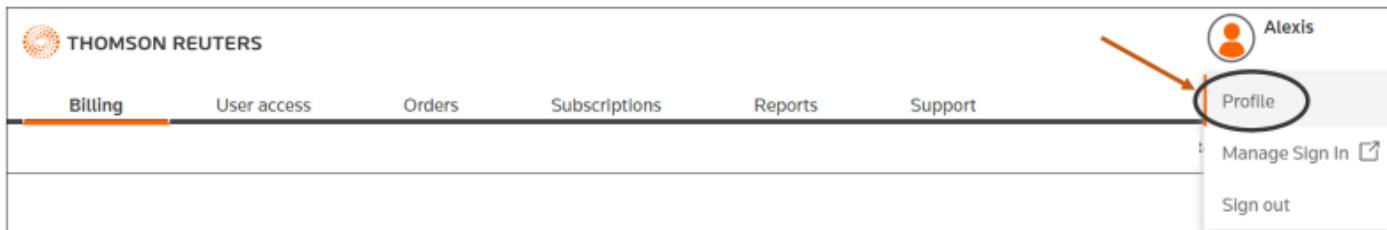
### View Profile, Manage Sign In or Sign Out

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



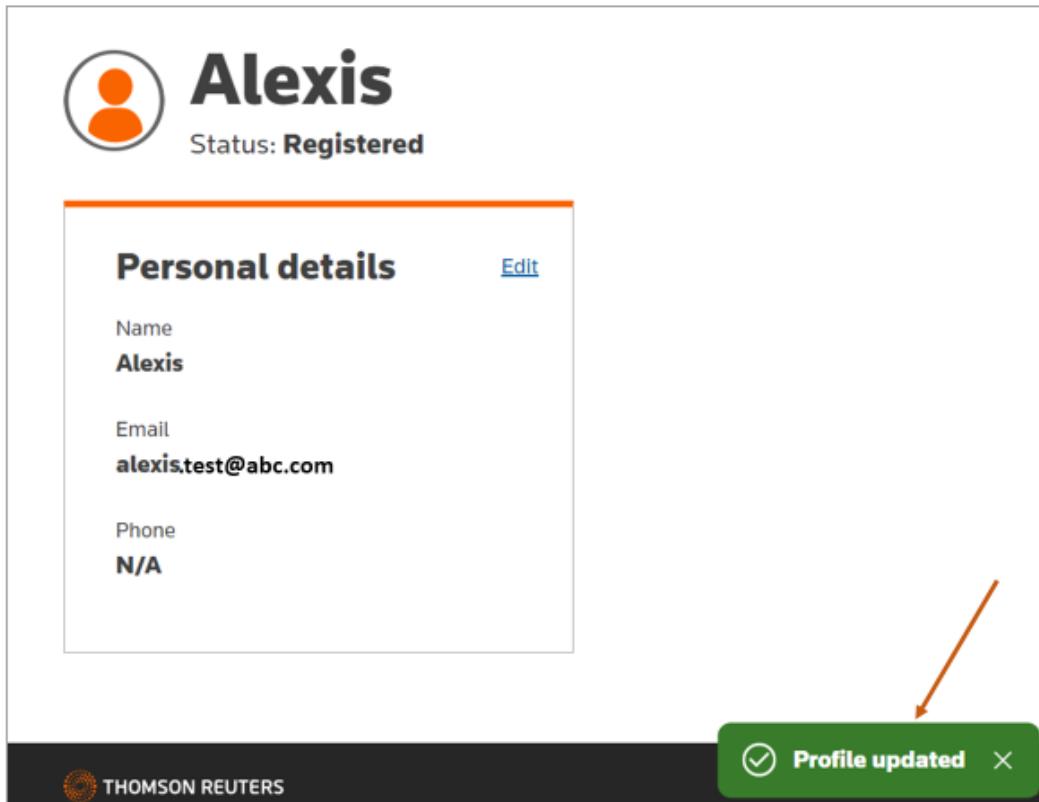
### Profile

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



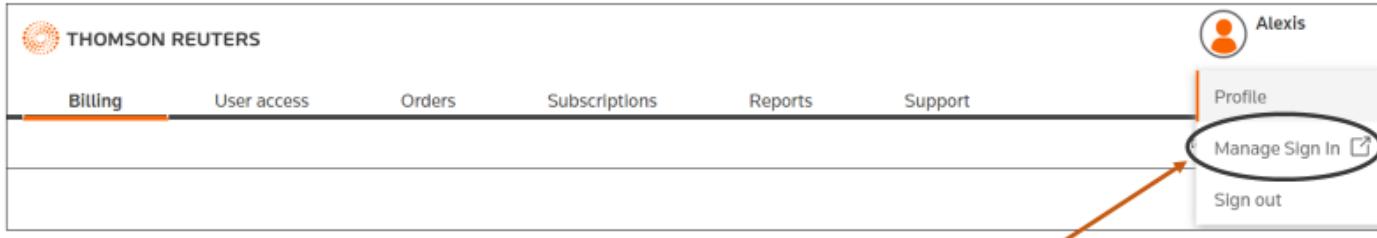
After clicking **Profile**, your personal details will appear. To edit your "Last name" or "Phone number," click **Edit** on the right side of the **Personal details** box. Next, make any changes. Then click **Save**.

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



## 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.



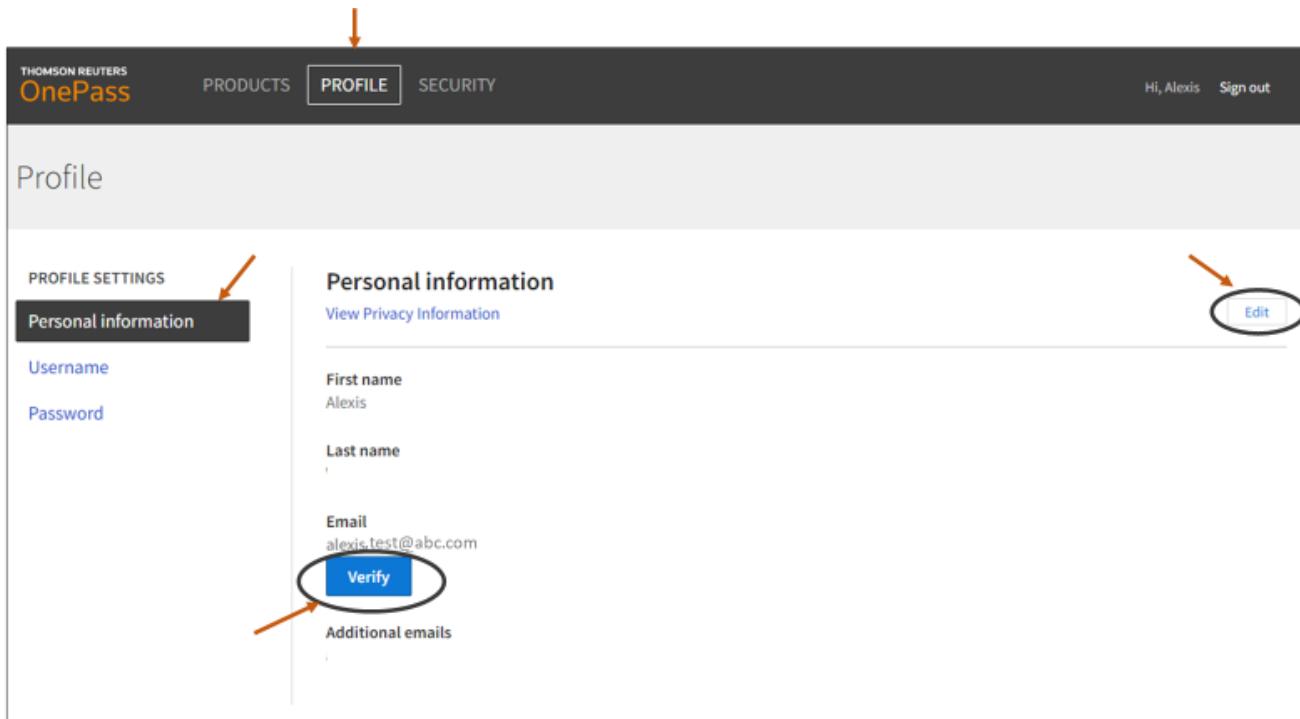
Next, follow the prompts to verify your identity.

A screenshot of a 'Verify' page. The title is 'Verify' and the sub-instruction is 'Select an authentication method.' There are two options: 'Email al\*\*\*@abc.com with a code' (selected, indicated by a blue radio button) and 'Answer your security question' (unselected, indicated by an empty radio button). A large orange arrow points from the 'Continue' button to the 'Email' option.

A screenshot of a 'Verify' page. The title is 'Verify' and the sub-instruction is 'Enter the code that you received via email at: al\*\*\*@abc.com.' There is a text input field labeled 'Security code' with a blue border, a 'Verify' button (circled in orange), a 'Resend code' link, and a 'Unable to receive code?' link. A large orange arrow points from the 'Verify' button on the previous page to the 'Verify' button on this page.

*OnePass PROFILE*

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



Profile

PROFILE SETTINGS

**Personal information**

View Privacy Information

Username

Password

First name  
Alexis

Last name  
'

Email  
alexis.test@abc.com

**Verify**

Additional emails

Hi, Alexis Sign out

Profile

PROFILE SETTINGS

**Personal information**

View Privacy Information

**Edit**

Profile

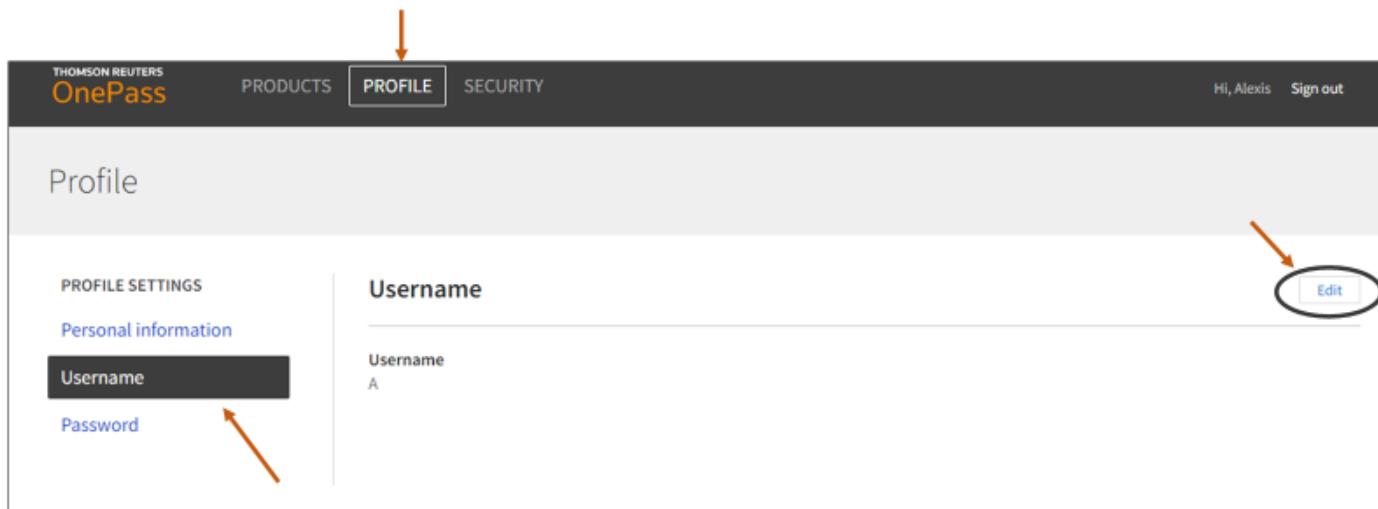
PROFILE SETTINGS

**Personal information**

**Username**

Username  
A

Hi, Alexis Sign out



Profile

PROFILE SETTINGS

**Personal information**

**Username**

Username  
A

Hi, Alexis Sign out

Profile

PROFILE SETTINGS

**Personal information**

**Username**

Username  
A

**Edit**

Profile

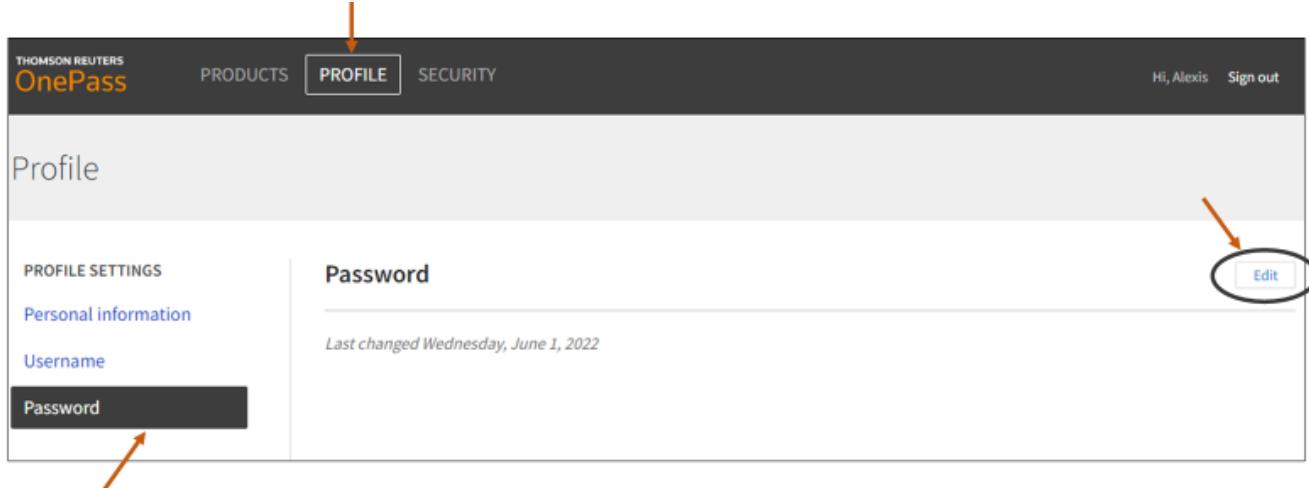
PROFILE SETTINGS

**Personal information**

**Username**

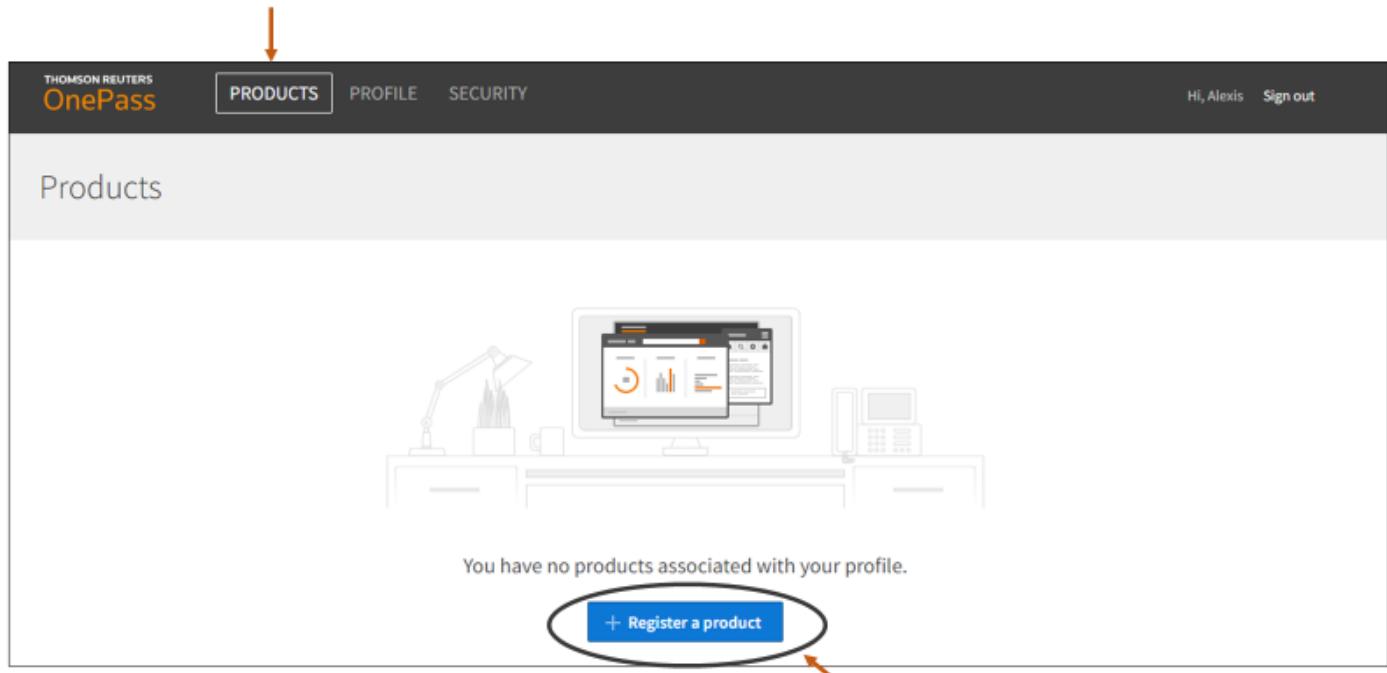
Username  
A

Hi, Alexis Sign out

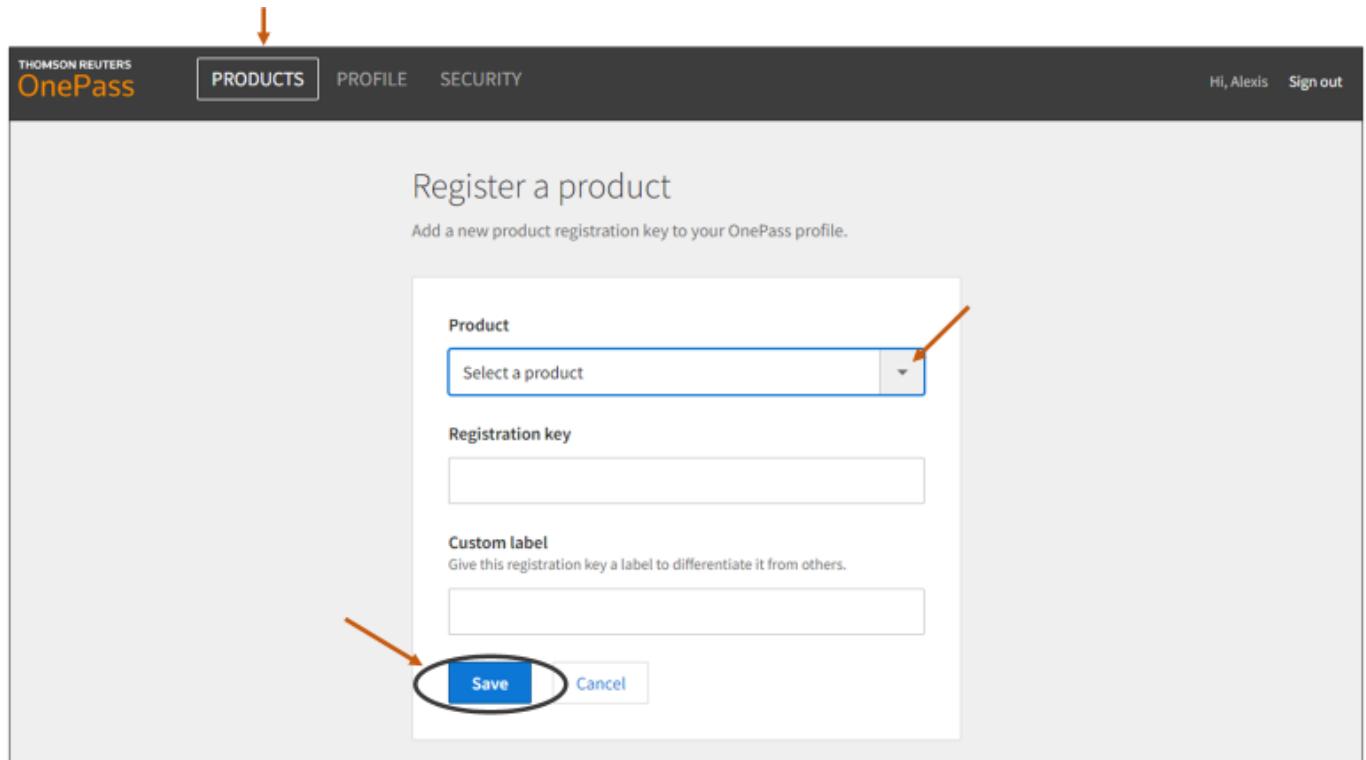


*OnePass* PRODUCTS

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

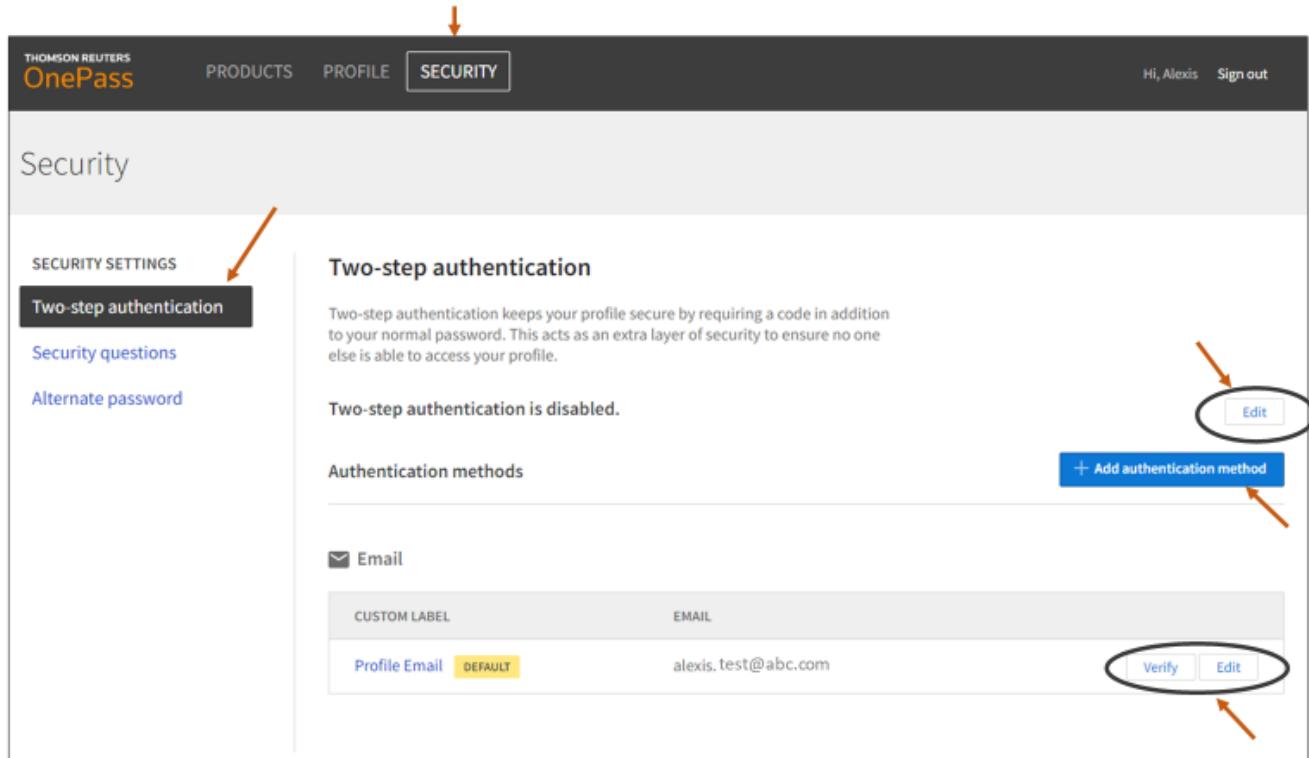


Next, click on the carrot under Product and select the **Product** you want to register. Then, provide the **Registration key** and if desired a **Custom label**. Then, click **Save**.

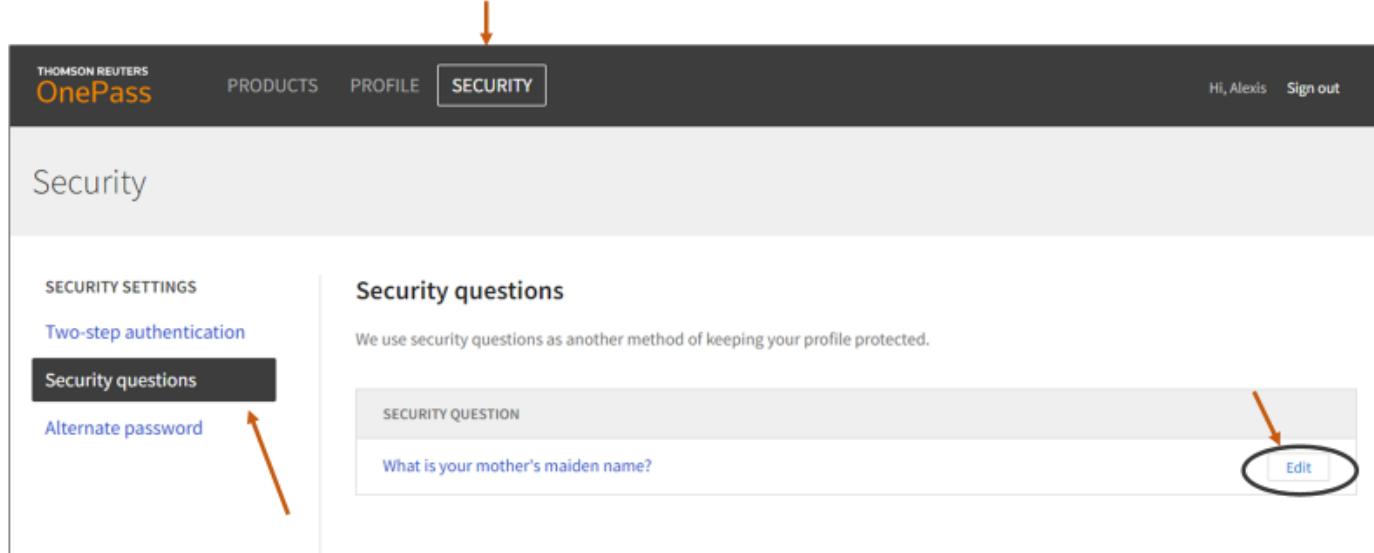


### OnePass SECURITY

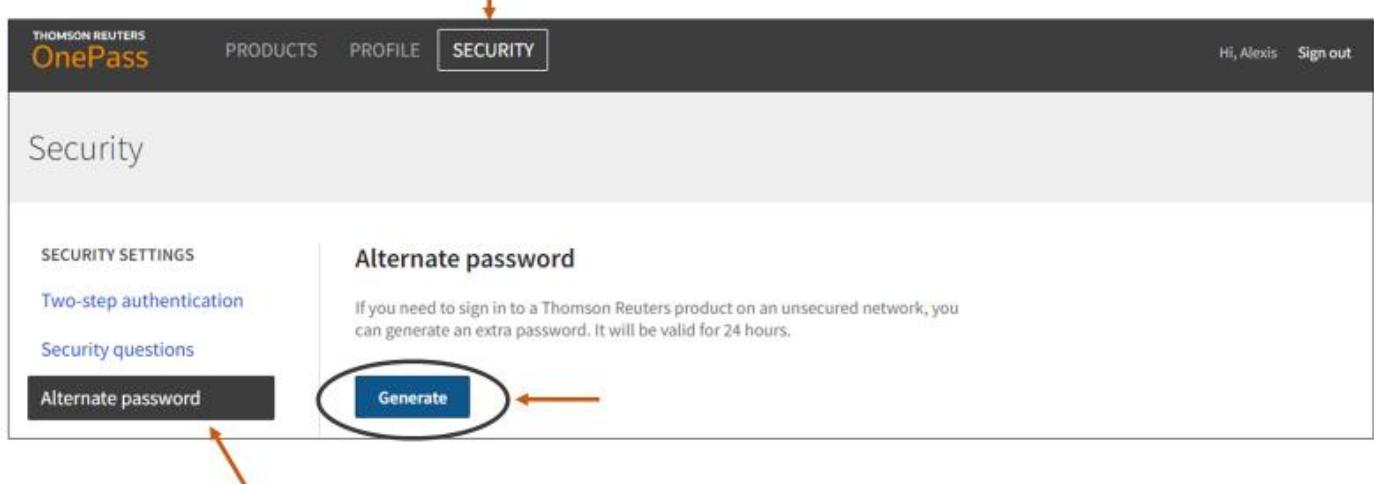
Navigate to SECURITY to change your security settings, including: 1) setting up **Two-step authentication**, 2) **Security questions**, and 3) creating an **Alternate password** (see illustrations below).



The screenshot shows the 'Two-step authentication' section of the Security page. The left sidebar has 'Two-step authentication' selected. The main content area shows that two-step authentication is disabled. It includes an 'Email' authentication method with a 'Profile Email' of 'alexis.test@abc.com'. There are 'Verify' and 'Edit' buttons for this method. A blue 'Add authentication method' button is also present. The top navigation bar shows 'SECURITY' is selected.



The screenshot shows the 'Security questions' section of the Security page. The left sidebar has 'Security questions' selected. The main content area shows that security questions are used as another method of keeping the profile protected. It displays a single security question: 'What is your mother's maiden name?'. There is an 'Edit' button for this question. The top navigation bar shows 'SECURITY' is selected.



THOMSON REUTERS® OnePass

PRODUCTS PROFILE SECURITY

Hi, Alexis Sign out

## Security

SECURITY SETTINGS

Two-step authentication

Security questions

Alternate password

Alternate password

Generate

### 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.



THOMSON REUTERS

Billing User access Orders Subscriptions Reports Support

Alexis

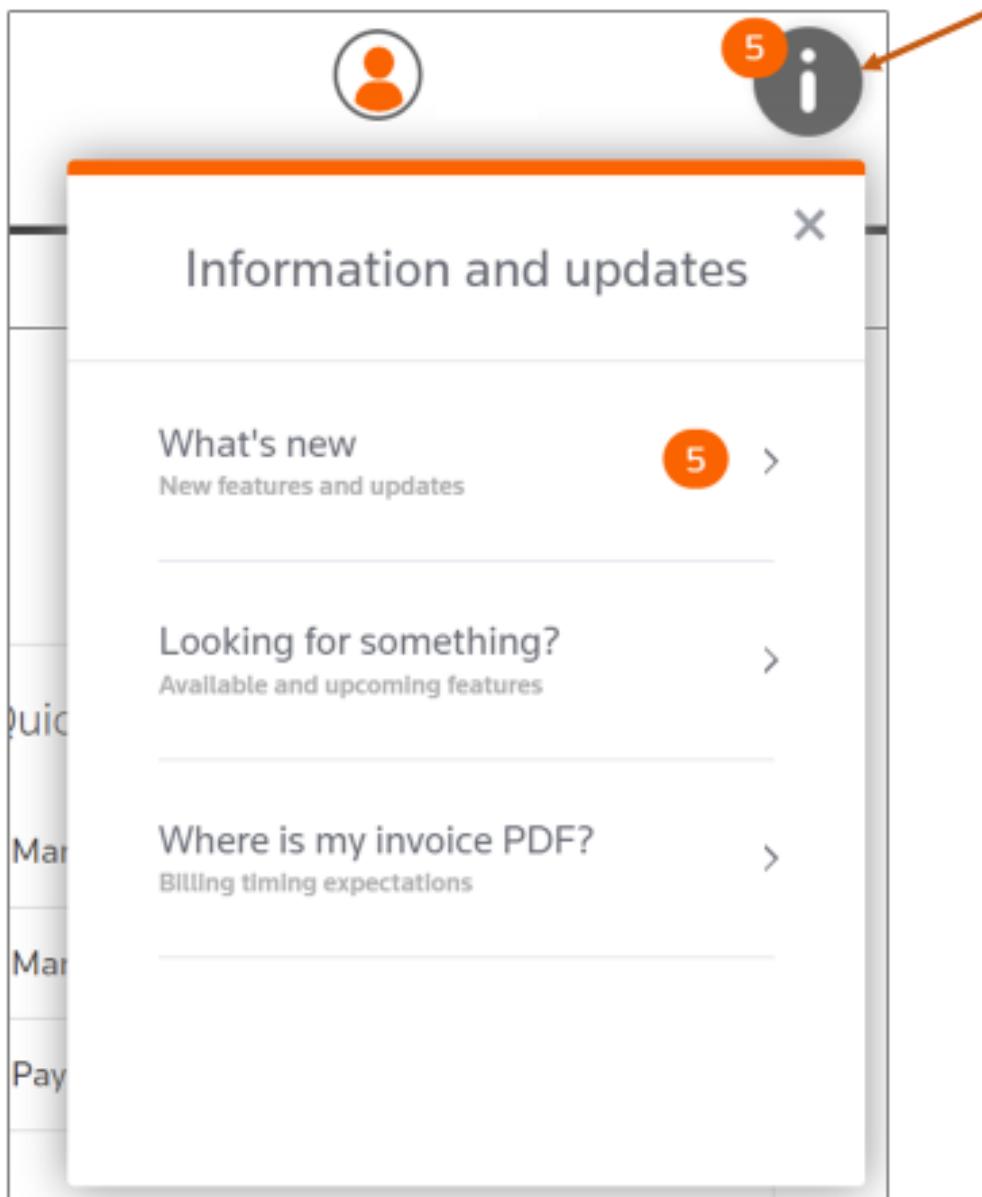
Profile

Manage Sign In

Sign out

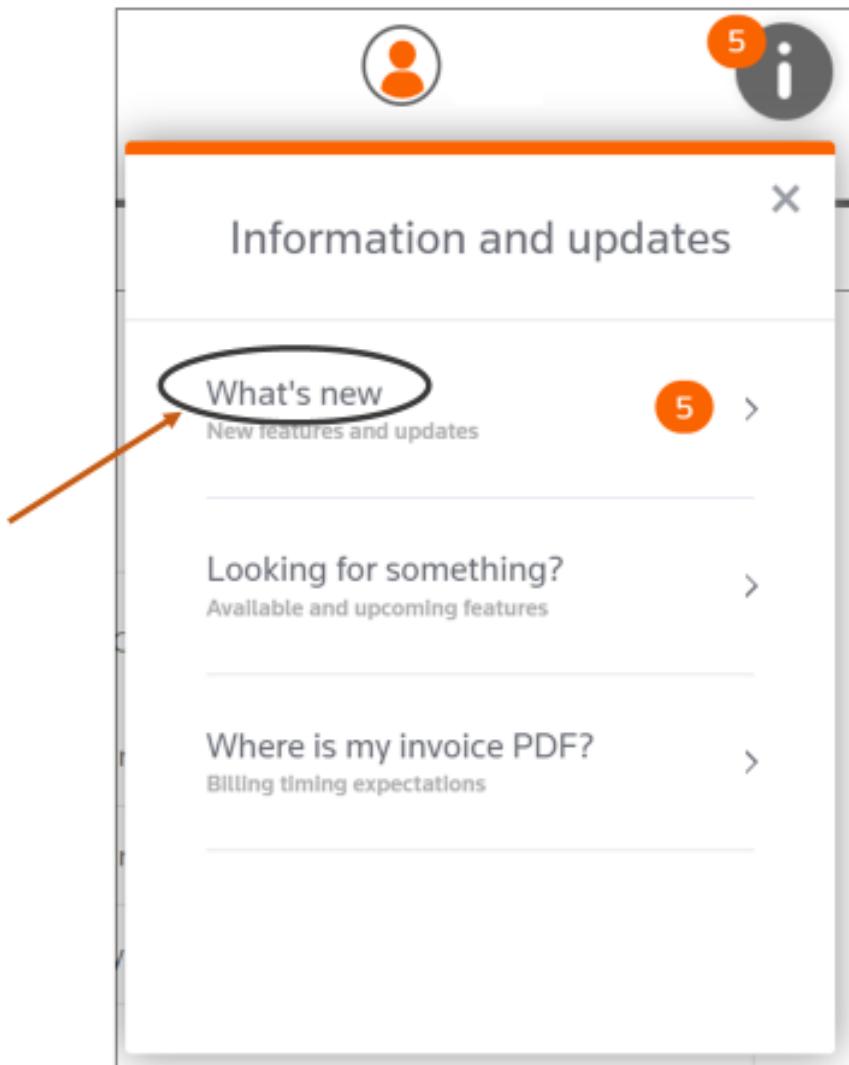
## INFORMATION AND UPDATES

Click on the ⓘ on the top right side.



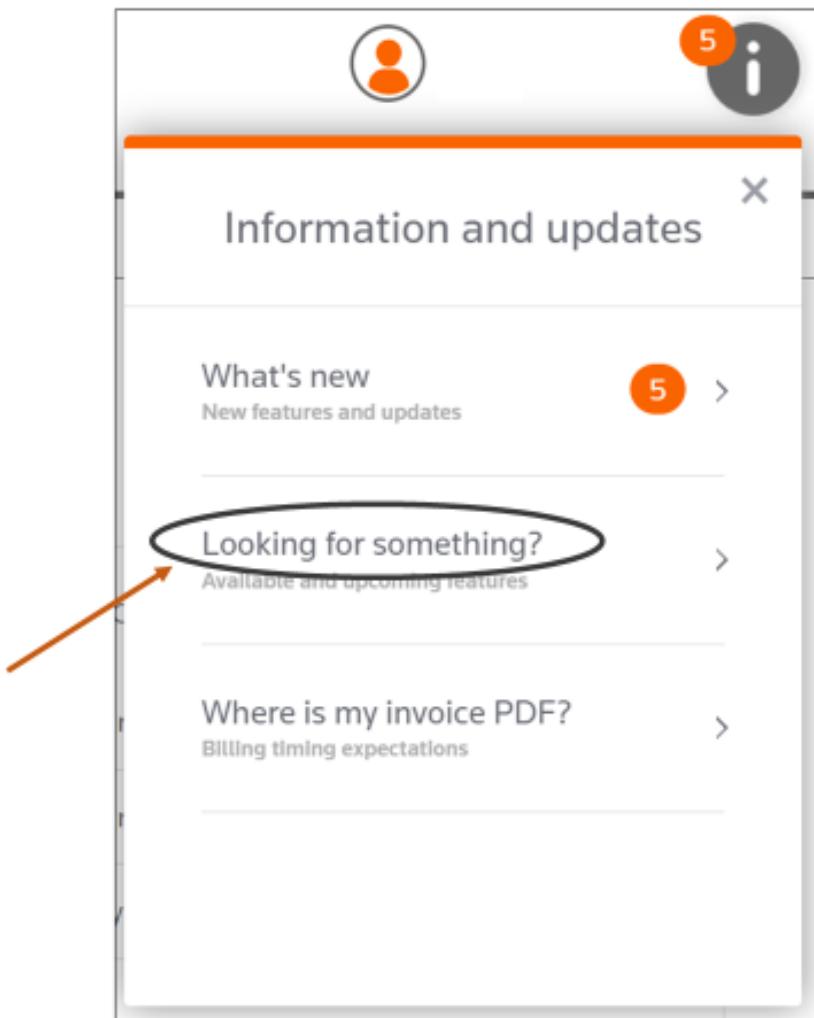
## What's new

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

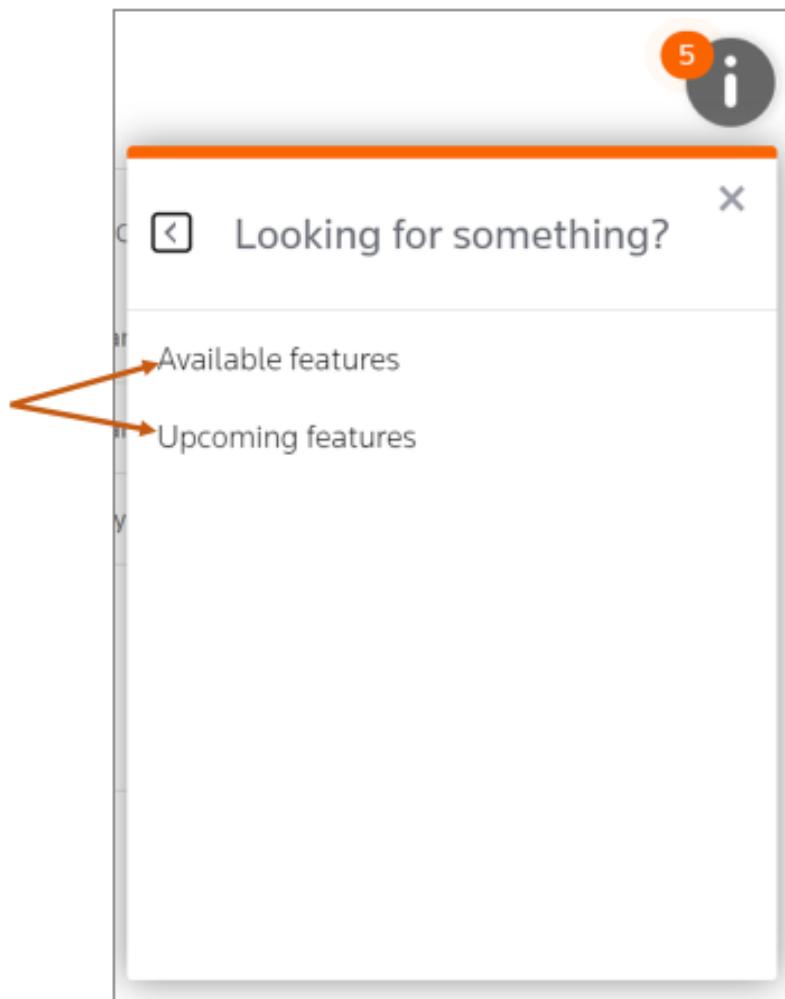


## Looking for something?

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**.

The screenshot shows the top navigation bar with tabs: Billing, User access, Orders, Subscriptions, Reports, and Support. The Support tab is highlighted with a red arrow. Below the navigation bar, the word "Support" is displayed in a large, bold, dark font. To the left of the word "Support" is an icon depicting a laptop, a speech bubble with a question mark, a person silhouette, and a document. Below this icon is the text "Submit tickets to get help faster". To the right of the "Support" text is a "Quick links" box containing four items: Westlaw Edge Training, Westlaw Classic Training, Practical Law Training, and Knowledge Center, each with a small orange arrow pointing to the right. At the bottom left, there is a large orange button with the text "Submit a ticket" inside, which is also circled with a red oval and has a red arrow pointing to it from the left.

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

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?

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

4 Tell us a little more.

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  
  
  
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

Ticket subject

Email

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

**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.

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

Chat with an Expert

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

Chat

\*First Name

\*Last Name

\*Email

\*Subject

Start Chatting

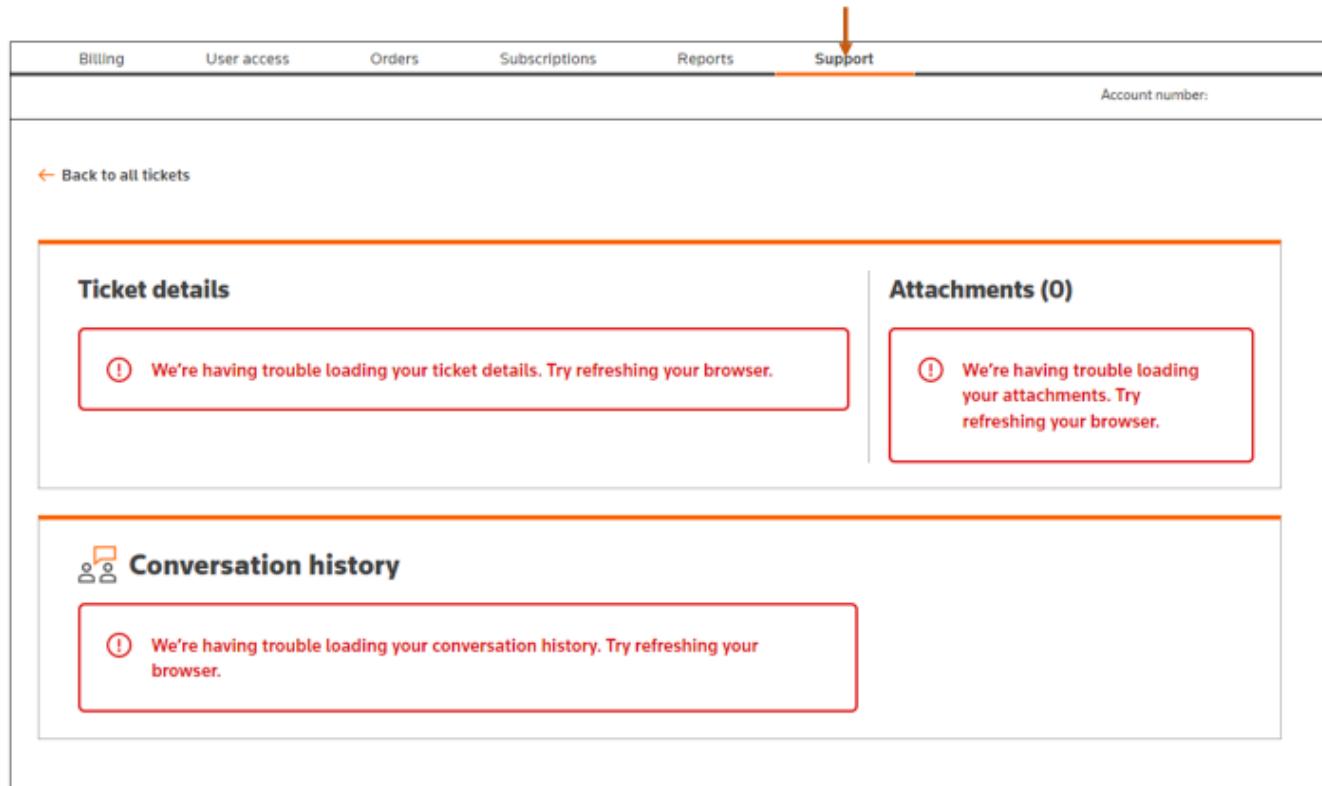
## TROUBLESHOOTING & FAQS

### 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.

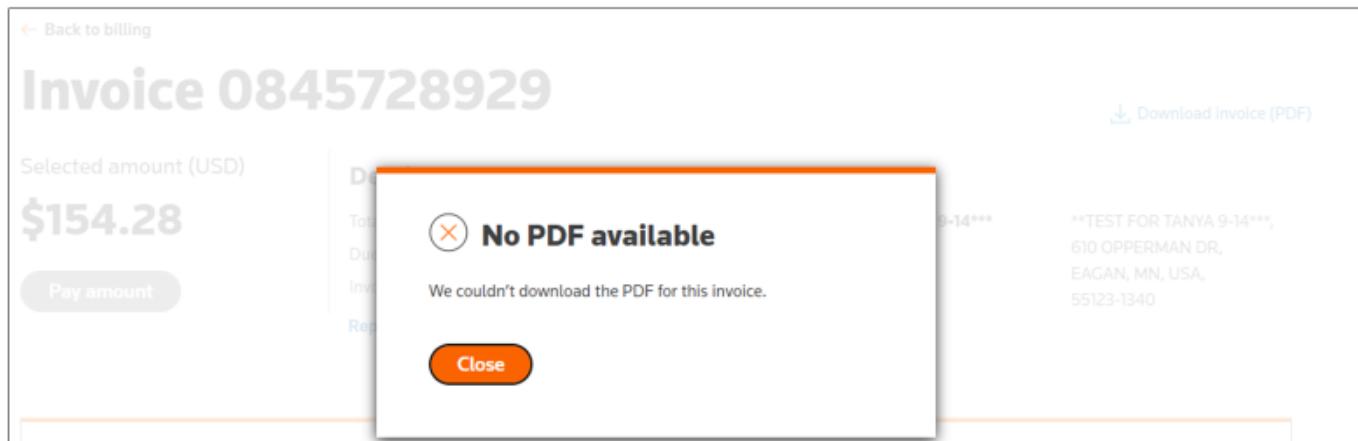
### Error Displaying Support Data

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.



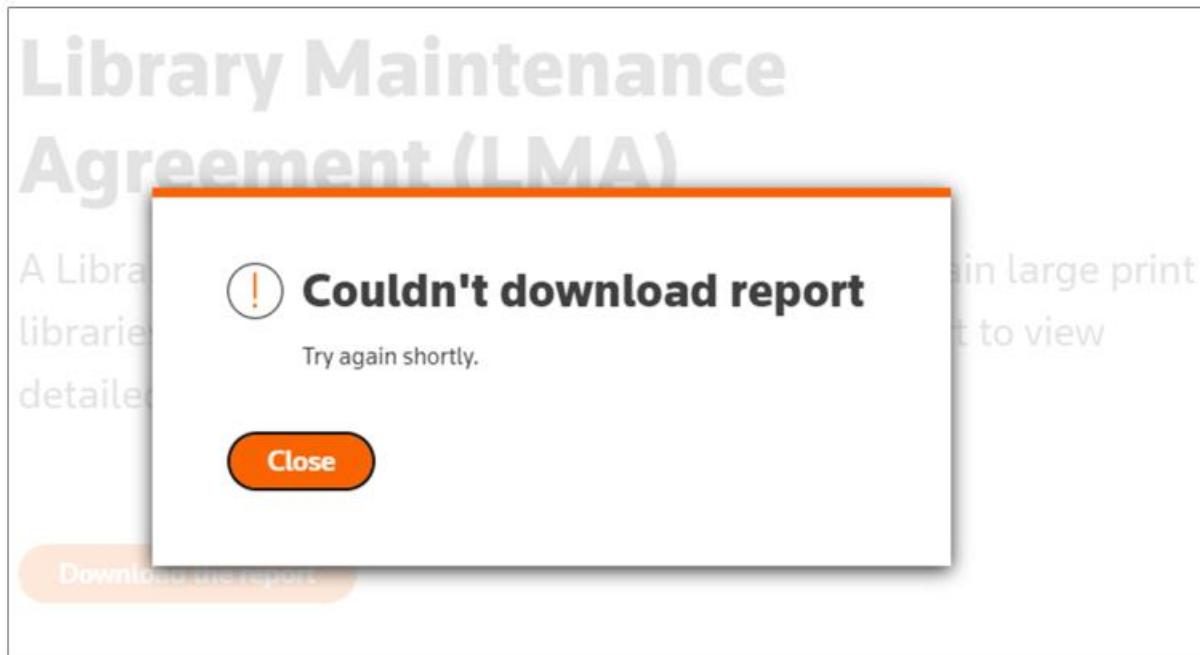
## Failure to Download Invoice

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.



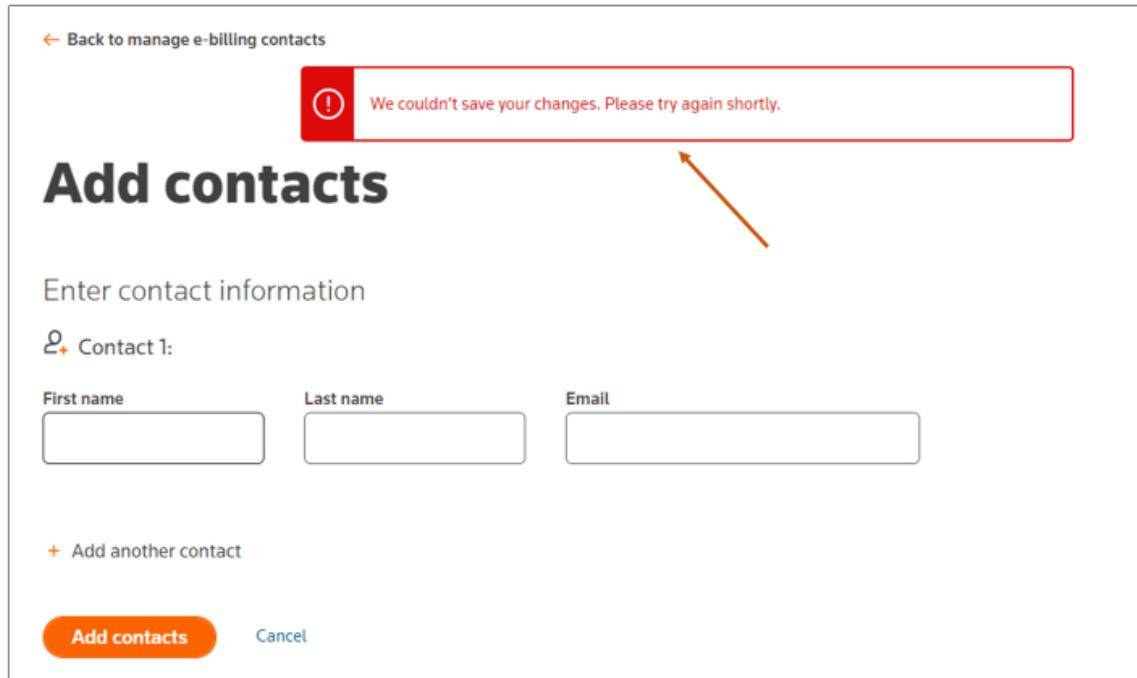
## Failure to Download Library Maintenance Agreement

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.

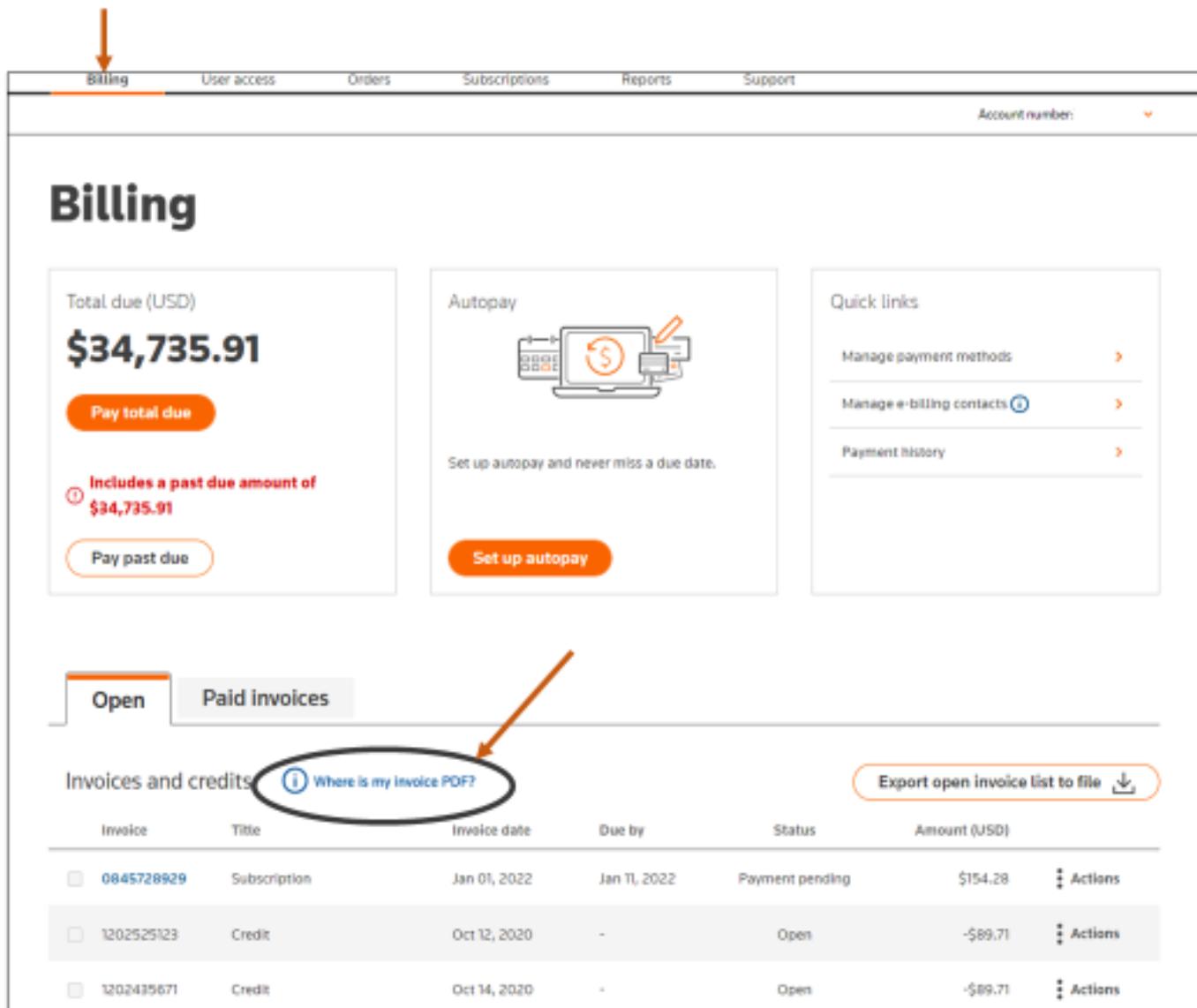


The screenshot shows a web page titled 'Add contacts' with a sub-header 'Enter contact information'. At the top left is a link 'Back to manage e-billing contacts'. A red error box contains the message 'We couldn't save your changes. Please try again shortly.' with an exclamation mark icon. An orange arrow points from the text 'You will need to repeat the process and make the changes again.' in the main content to this error message. Below the error box, the page displays fields for 'First name', 'Last name', and 'Email', each with an empty input box. Below these fields is a link '+ Add another contact'. At the bottom are two buttons: 'Add contacts' (orange) and '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?**.



The screenshot shows the 'Billing' tab selected in the top navigation bar. The main content area is titled 'Billing'. On the left, there's a summary box showing 'Total due (USD) \$34,735.91' with buttons for 'Pay total due' and 'Pay past due'. Below this, a note says 'Includes a past due amount of \$34,735.91' with a 'Pay past due' button. In the center, there's a 'Autopay' section with an icon of a computer monitor and a dollar sign, and a button to 'Set up autopay'. On the right, there's a 'Quick links' sidebar with 'Manage payment methods', 'Manage e-billing contacts', and 'Payment history'. The main table at the bottom is titled 'Invoices and credits' and has columns for 'Invoice', 'Title', 'Invoice date', 'Due by', 'Status', and 'Amount (USD)'. It shows three entries: one open invoice for a subscription and two credits. The 'Where is my invoice PDF?' link in the 'Title' column of the open invoice row is circled in blue and has a red arrow pointing to the 'Where is my invoice PDF?' link in the 'Autopay' section. Another red arrow points from the 'Autopay' section back to the 'Where is my invoice PDF?' link in the table row.

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	
<input type="checkbox"/> 1202525123	Credit	Oct 12, 2020	-	Open	-\$89.71	
<input type="checkbox"/> 1202435671	Credit	Oct 14, 2020	-	Open	-\$89.71	

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

**Did you know?**

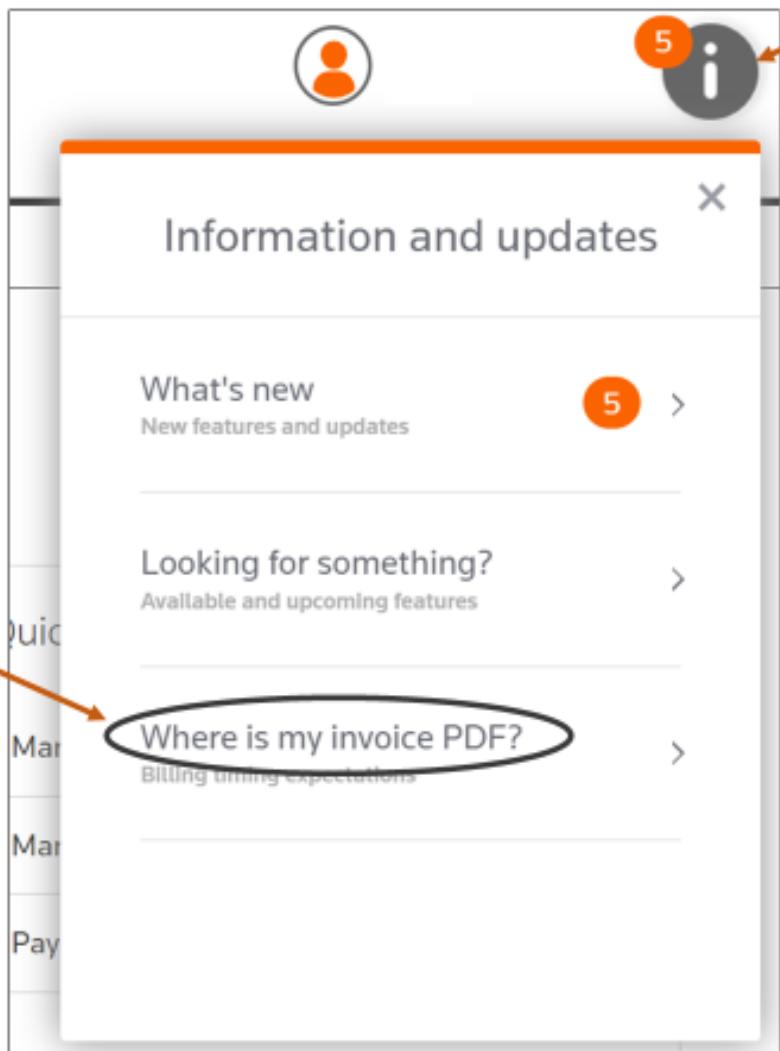
Online invoices (West information charges) are generated at the beginning of each month. Individual charges are visible on our self-service portal by the fourth day of each month and invoice PDFs are available for download by the seventh to eighth day of each month. Invoices are mailed shortly thereafter 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 <sup>th</sup> – 5 <sup>th</sup>	e-billing emails are sent with invoice PDF attached to the email
7 <sup>th</sup> – 8 <sup>th</sup>	Invoice PDF is available for download from the self-service portal

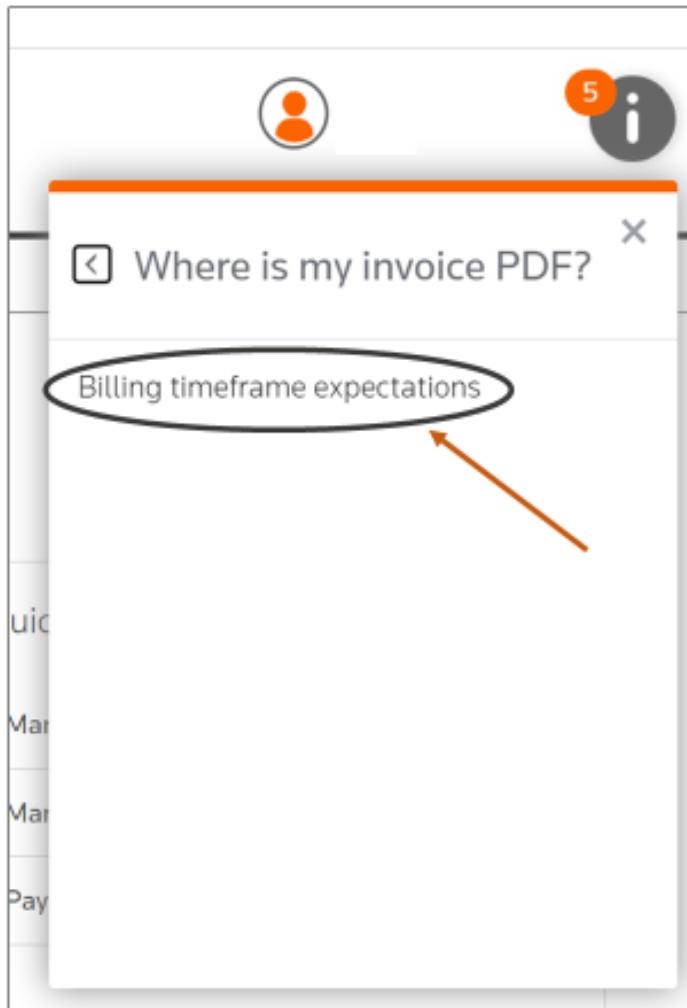
For more details, review [this article](#) in our Support Center.

**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.

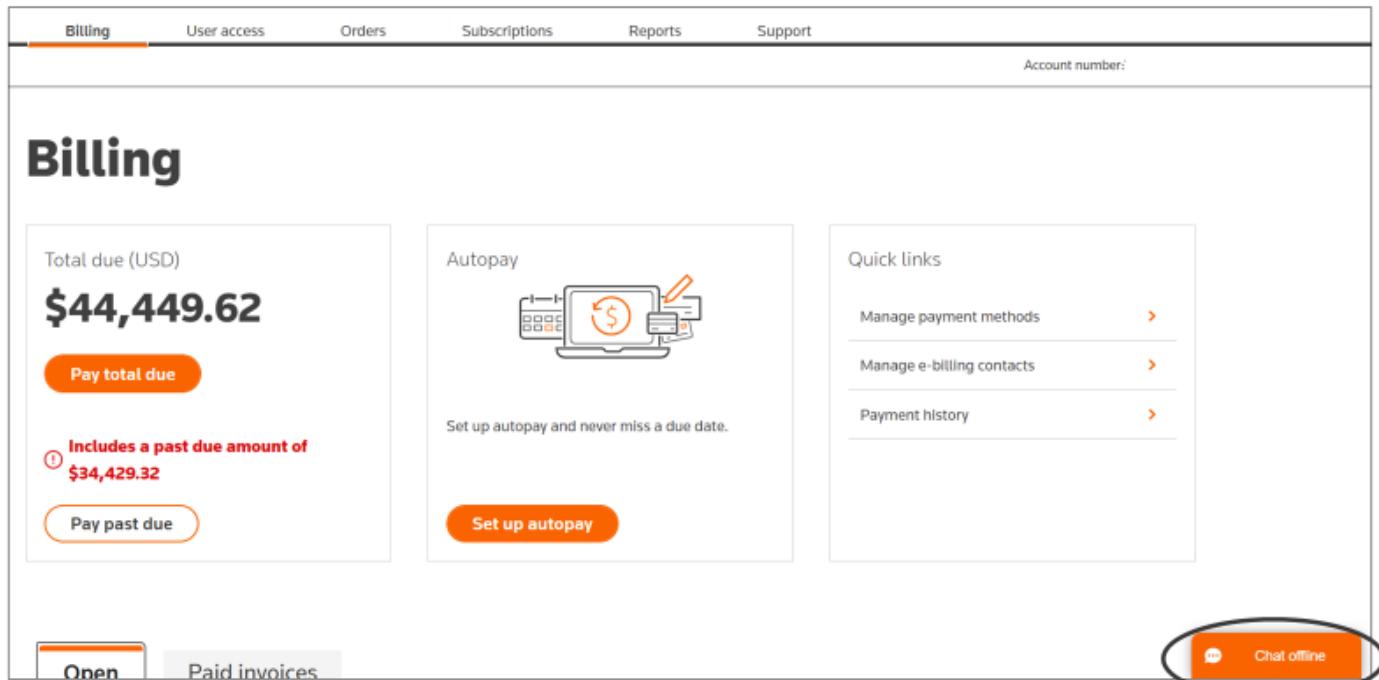


**Email [west.arcollection.inquiries@thomson.com](mailto:west.arcollection.inquiries@thomson.com)**

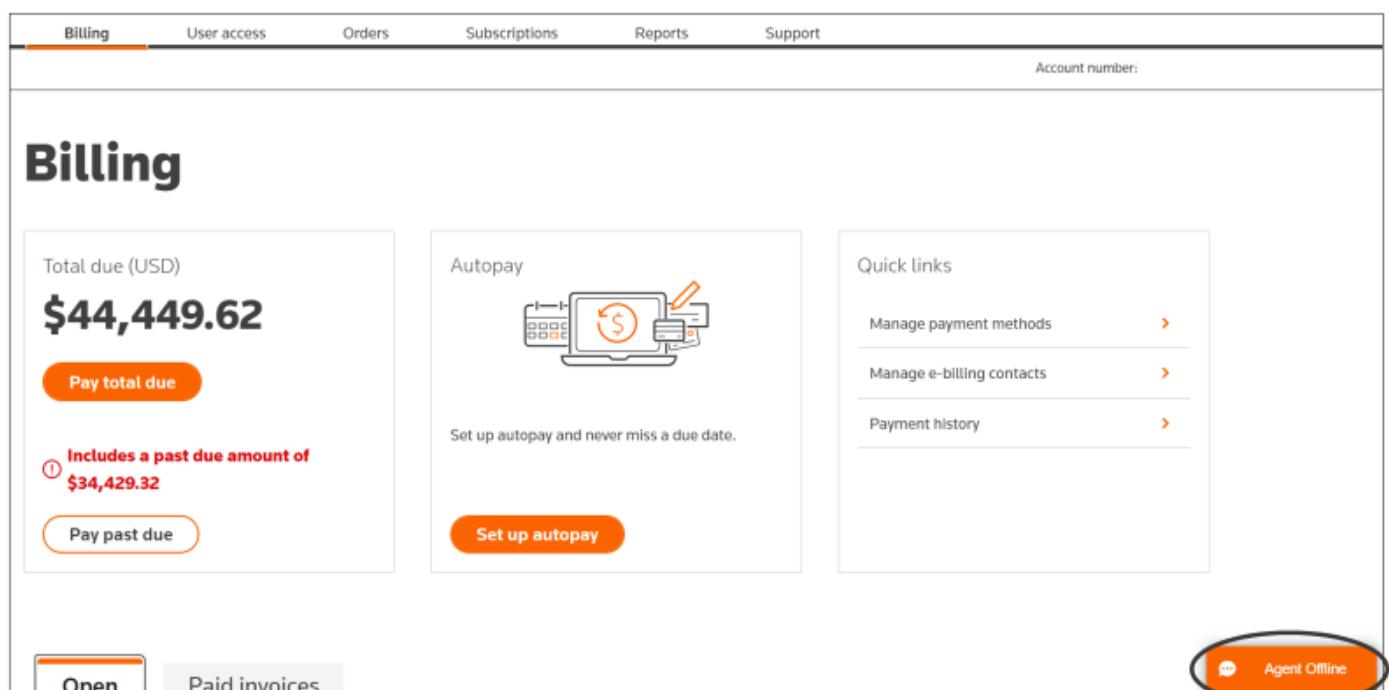
We'll get back to you within 2 business days.

## 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).



This screenshot shows the Billing section of the self-service portal. At the top, there is a navigation bar with tabs: Billing (which is active and highlighted in orange), User access, Orders, Subscriptions, Reports, and Support. Below the navigation bar, there is a search bar labeled "Account number:" with a magnifying glass icon. The main content area is titled "Billing". It displays the "Total due (USD)" as "\$44,449.62" in large bold text. Below this, there is a call-to-action button "Pay total due". A note indicates "Includes a past due amount of \$34,429.32" with a small info icon. Another button "Pay past due" is available. To the right, there is a "Autopay" section with an icon of a laptop and a credit card, and a button "Set up autopay". On the far right, there is a "Quick links" sidebar with three items: "Manage payment methods", "Manage e-billing contacts", and "Payment history", each with an orange arrow icon. At the bottom, there are two buttons: "Open" (highlighted in orange) and "Paid invoices". On the far right, there is a button labeled "Chat offline" with a small speech bubble icon, which is circled in orange to indicate it is the focus of this section.



This screenshot is identical to the one above, showing the Billing section of the self-service portal. The navigation bar, search bar, and main content area are the same. The "Chat offline" button at the bottom right is now circled in orange, indicating it is the focus of this section. The rest of the page content, including the "Autopay" section and the "Quick links" sidebar, remains the same.