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.

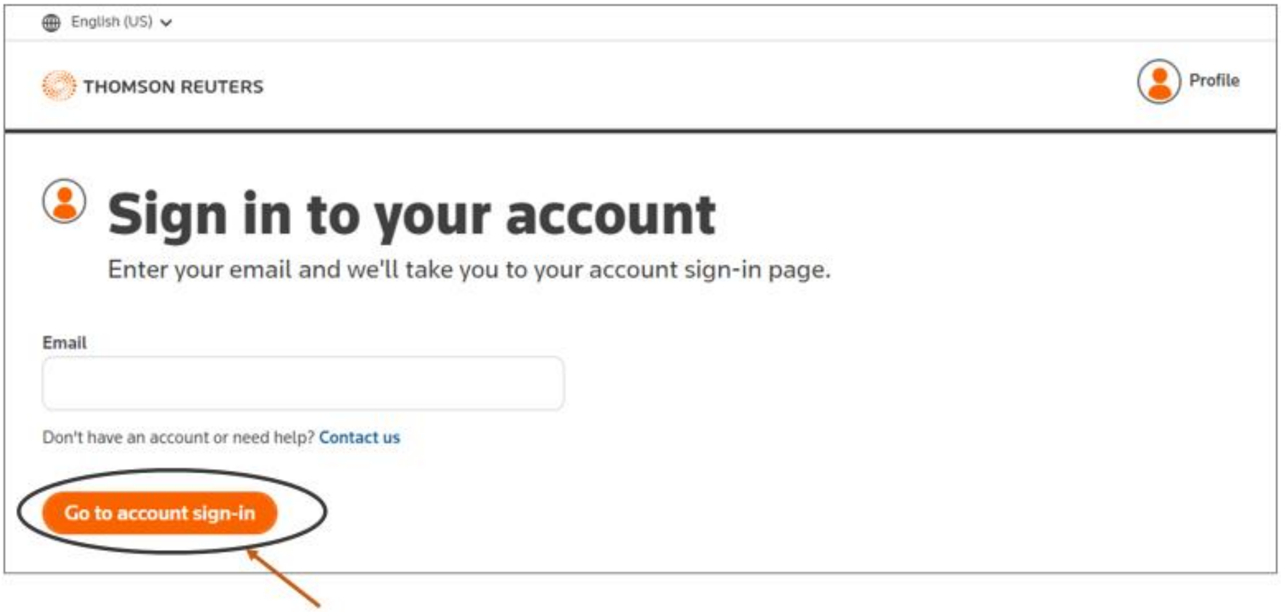
To access the portal, use the following URL: https://www.thomsonreuters.com/en-us/account/sign-in.

Contents

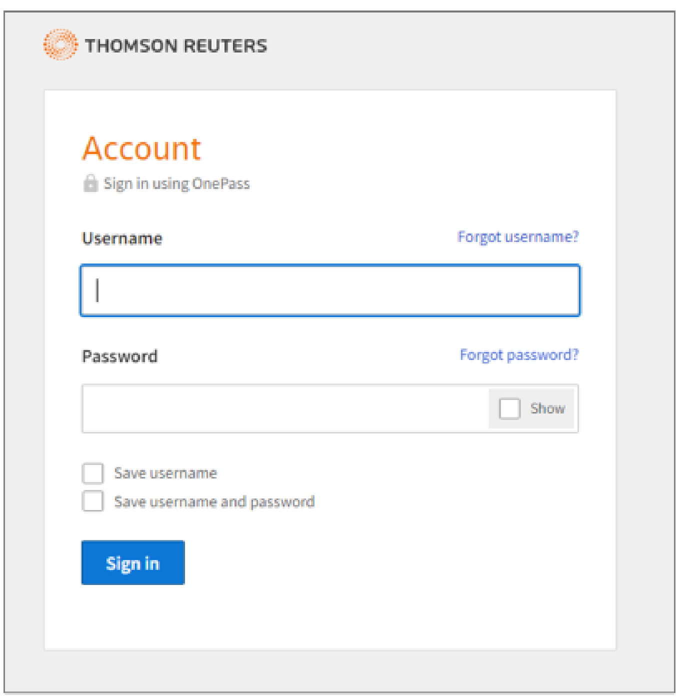
SIGN-IN TO SELF-SERVICE PORTAL

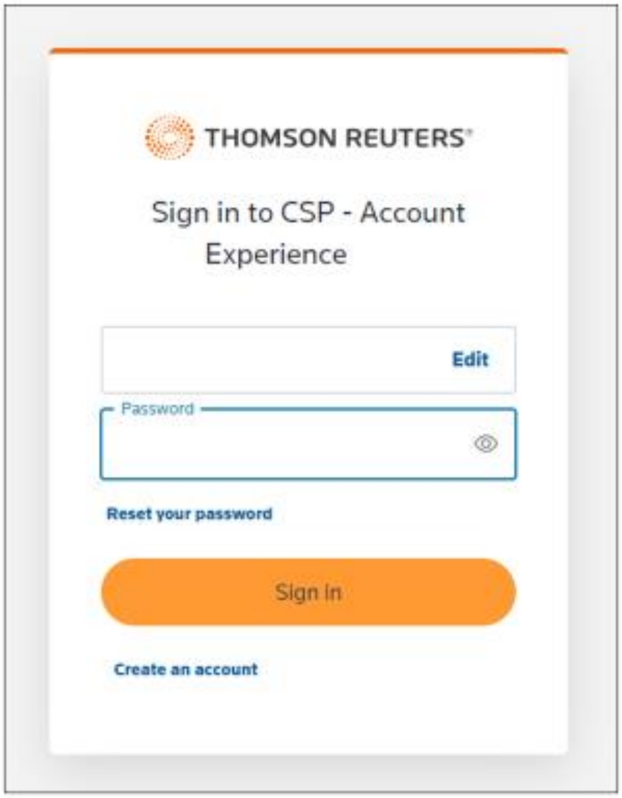
Sign-in

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

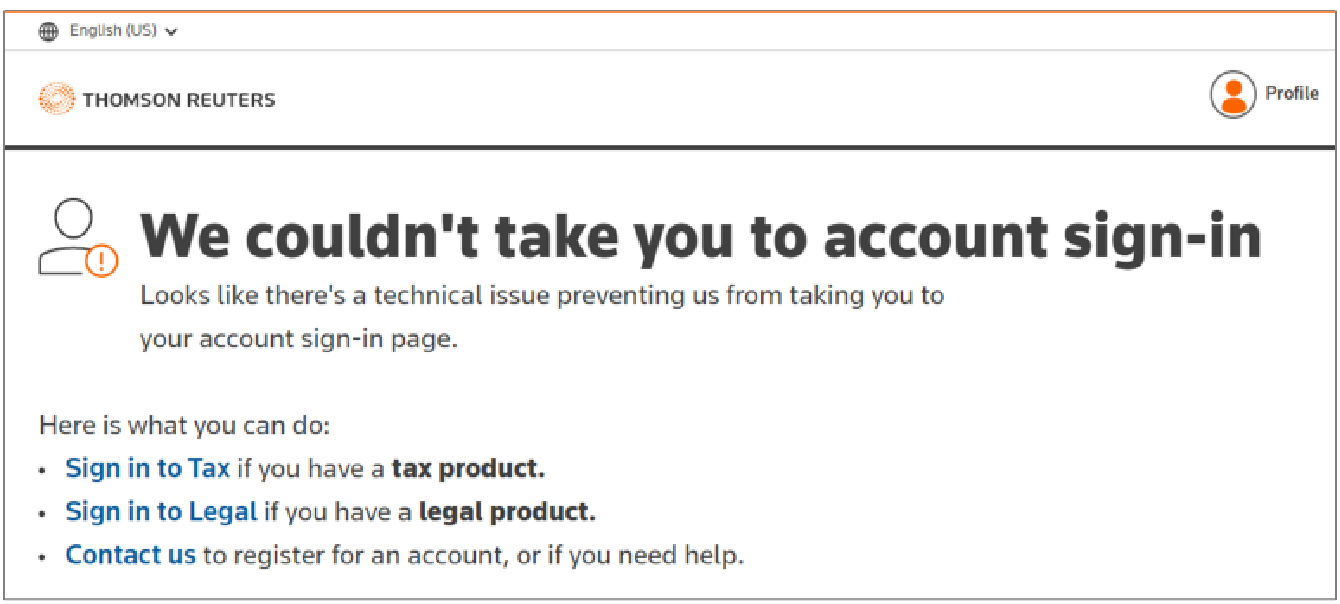


Next, sign-in to your account as prompted. Note, legal product customers (eDiscovery Point, Firm Central, Practical Law, Westlaw) will login using their OnePass account (similar to the first image below), while tax product customers (Checkpoint, CS Professional Suite, ONESOURCE, Onvio) will login using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



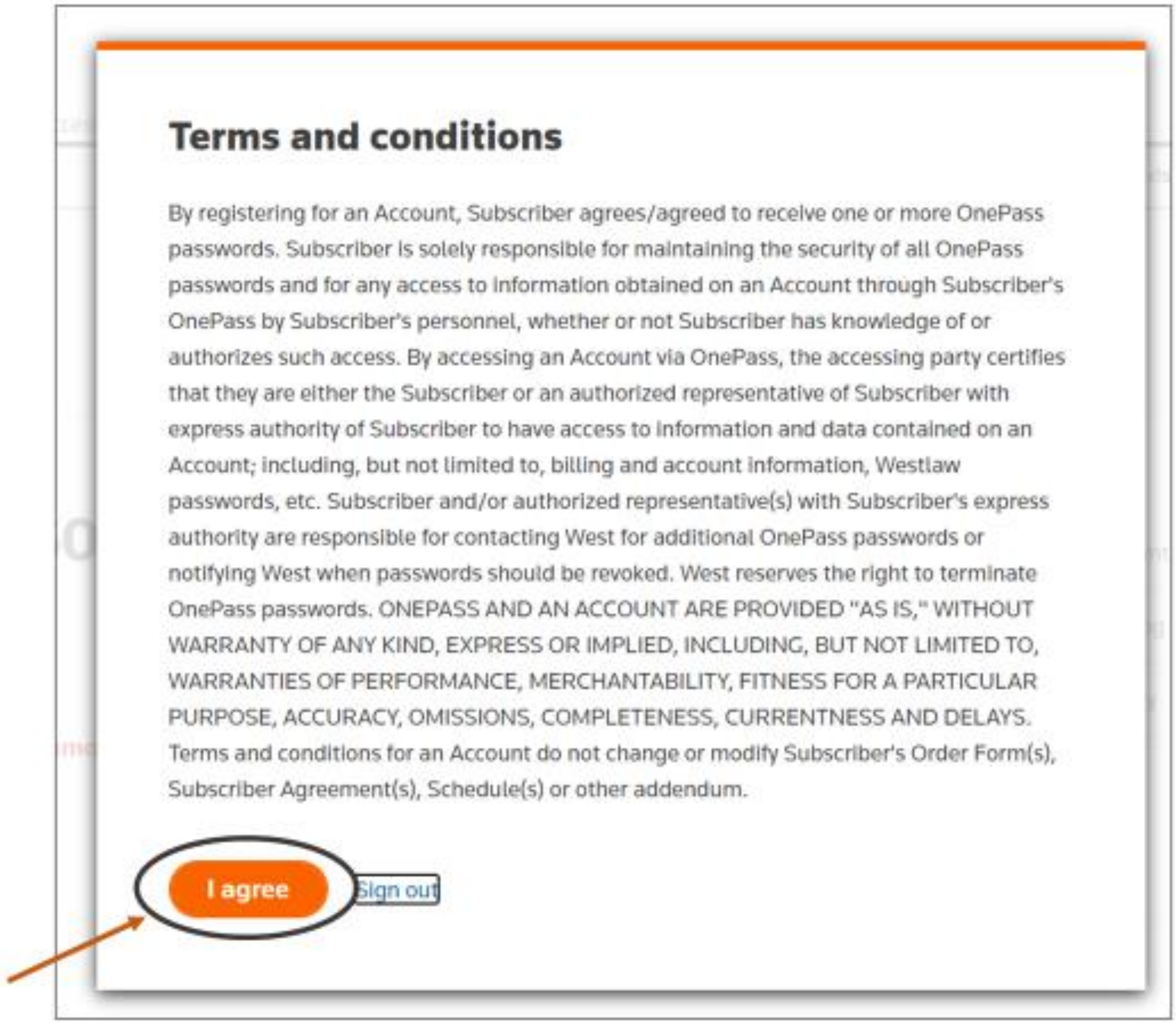


If your email address is not recognized, you will see a window similar to the below. To sign-in from here, click on the relevant link (**Sign in to Tax** / **Sign in to Legal**). If you do not have an account, click the **Contact us** link.

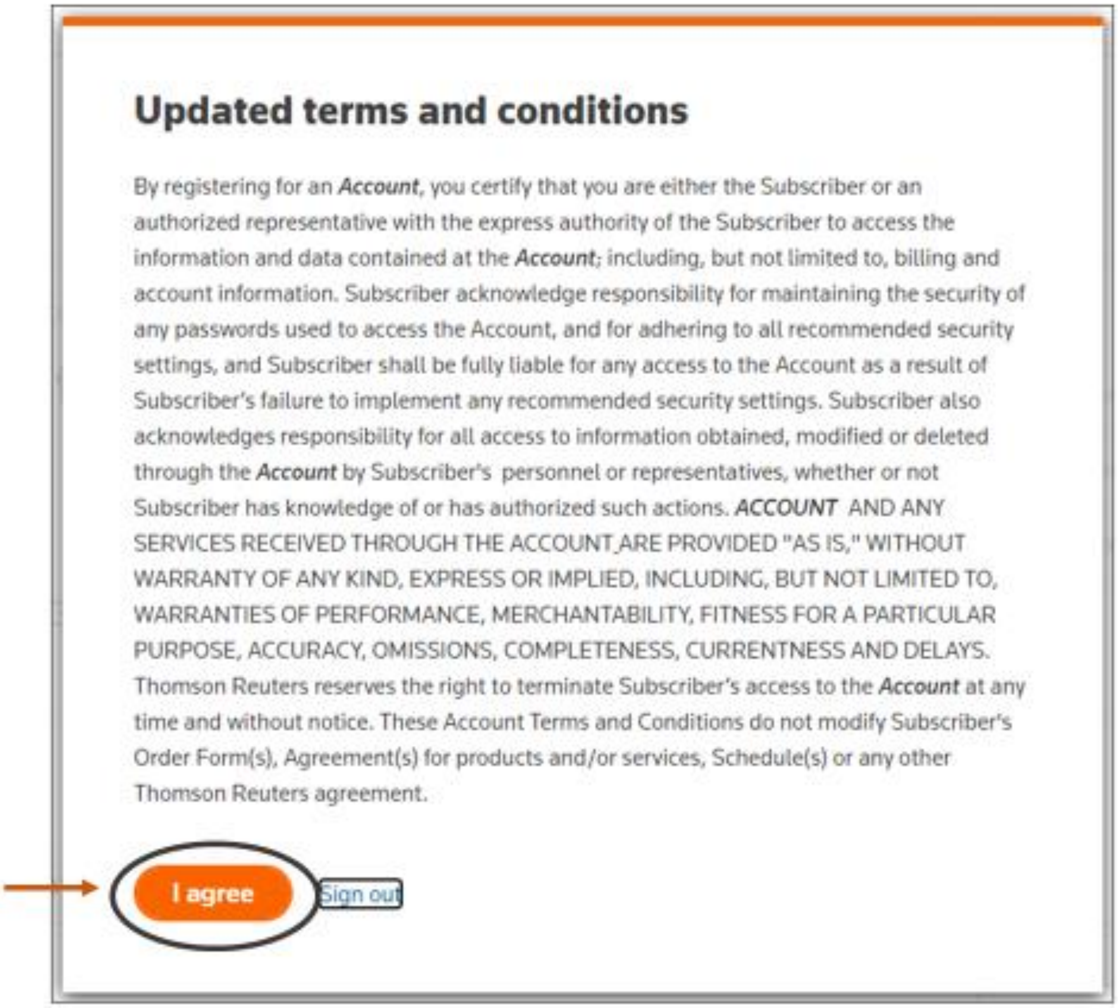


Terms and Conditions

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



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

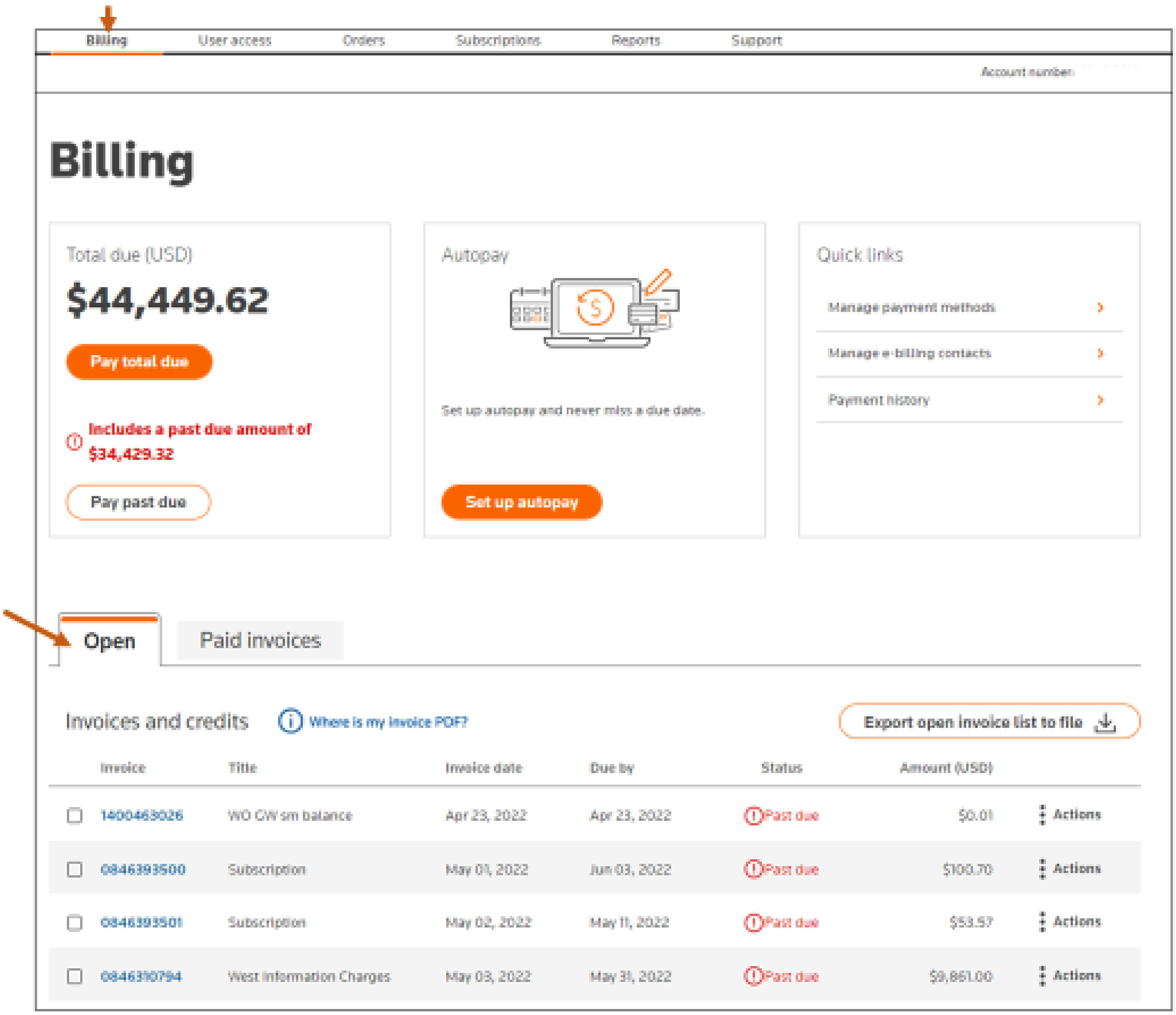


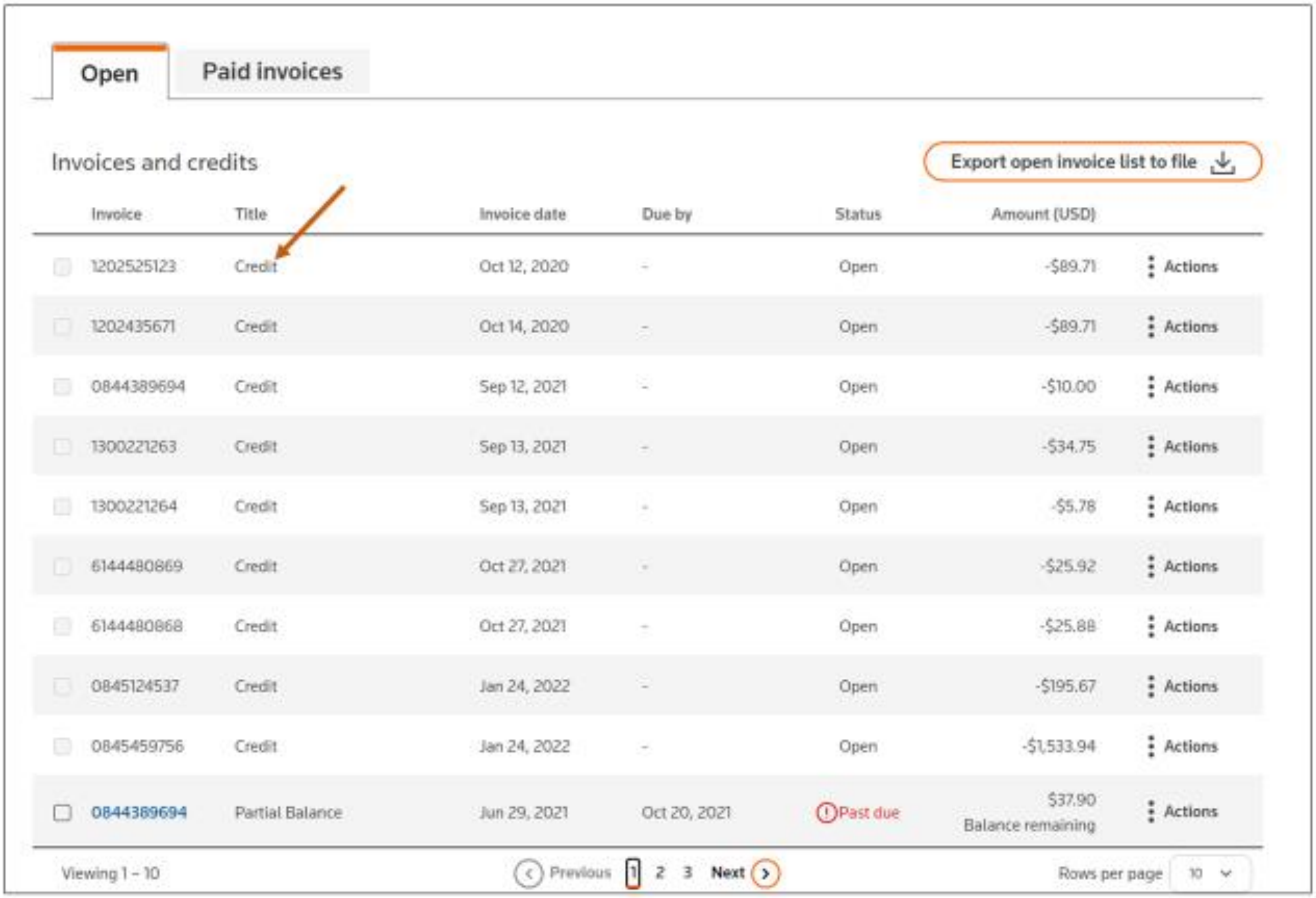
BILLING & PAYMENTS

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.





Open | Paid invoices

Invoices and credits

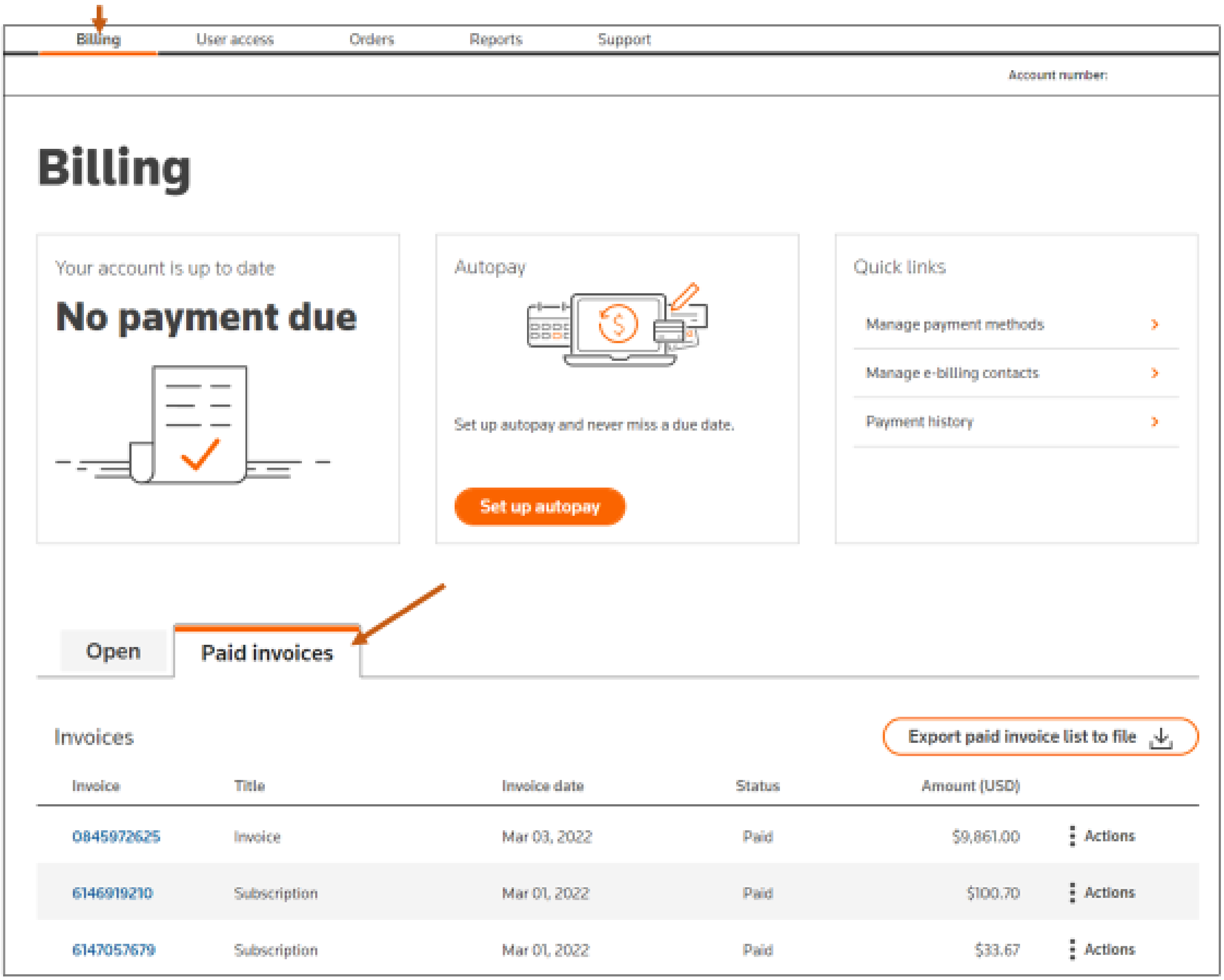
Export open invoice list to file

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

Viewing 1 – 10 | Previous 1 2 3 Next | Rows per page 10

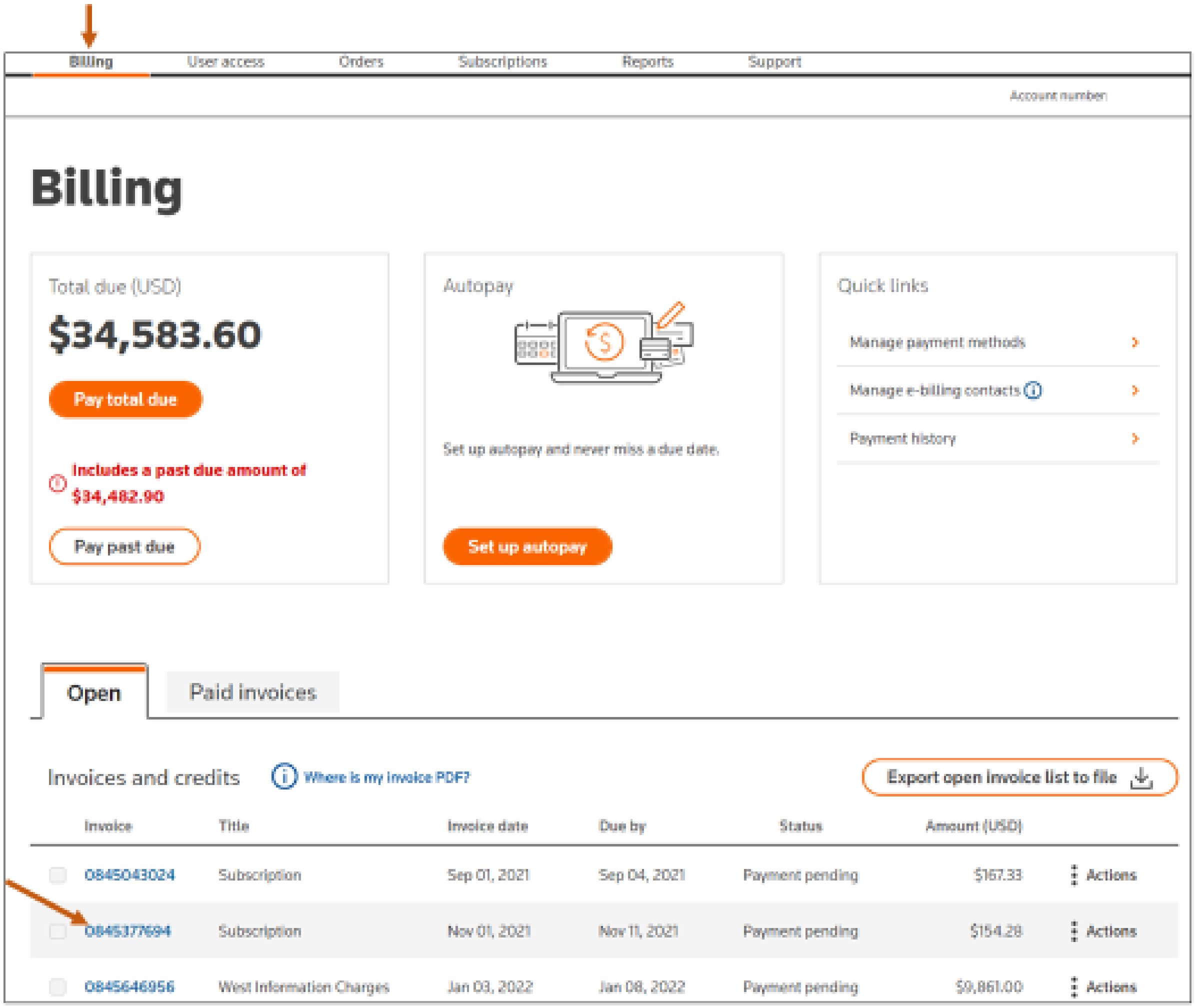
List of Invoices (Paid)

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



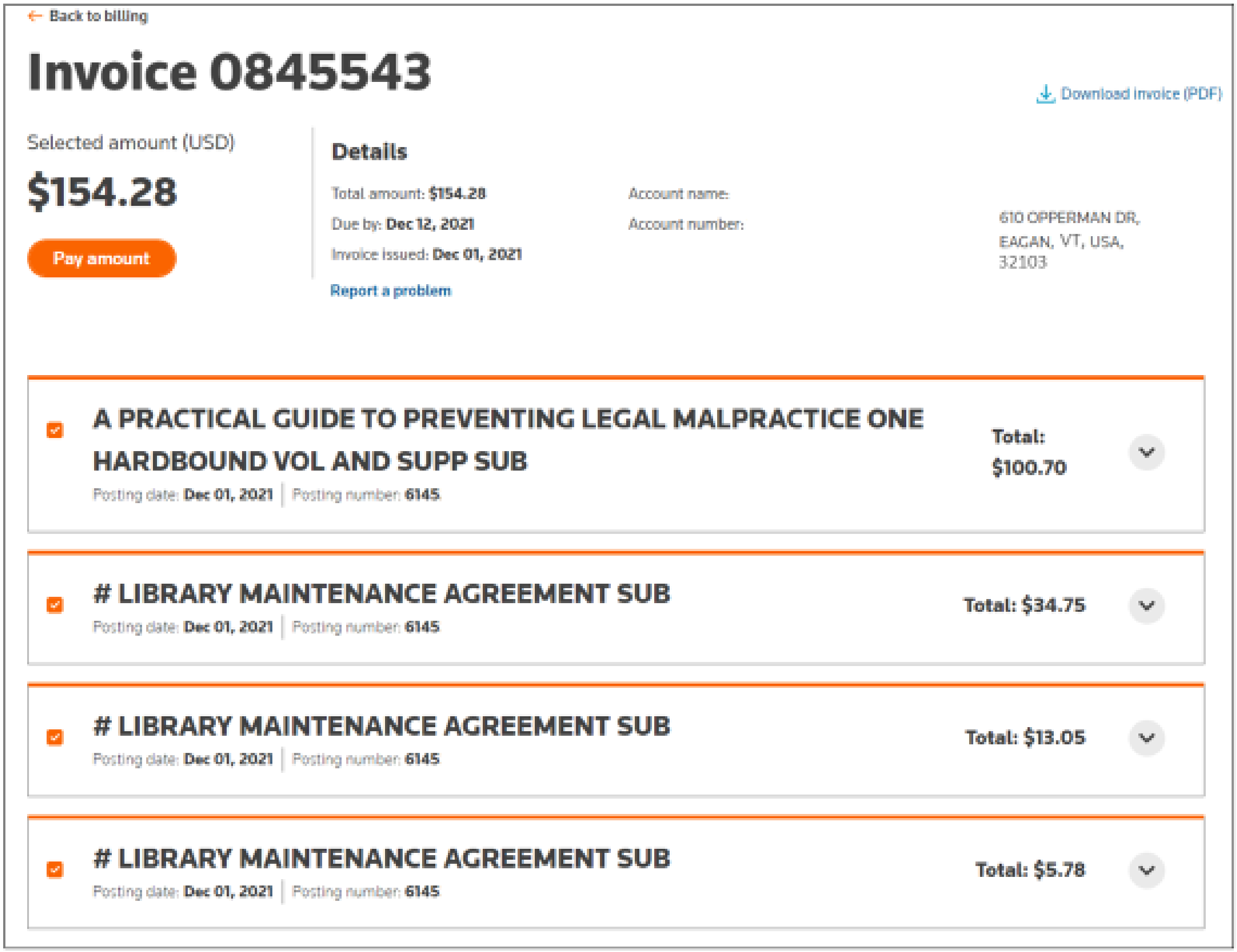
View Invoice Details

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



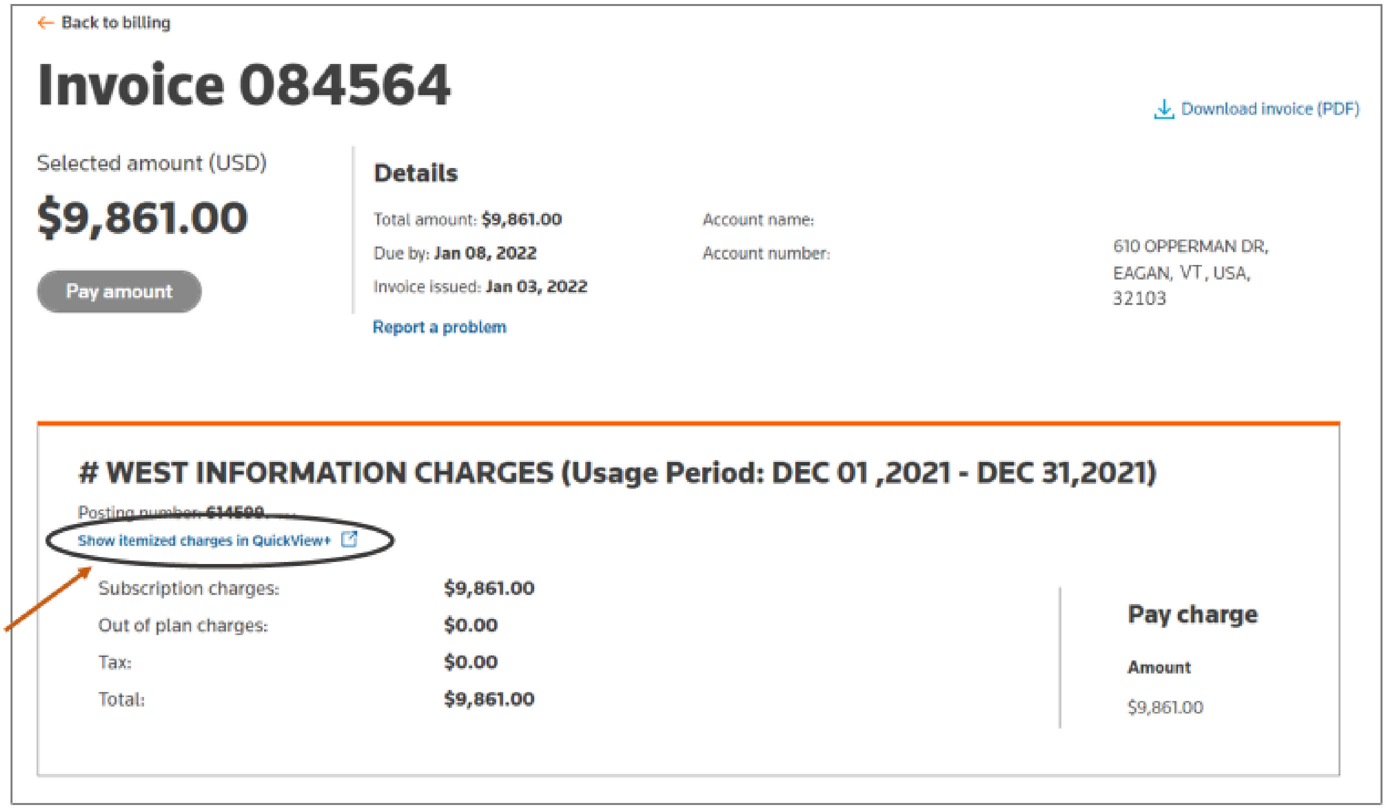
You can also view an open invoice by clicking **Actions** and selecting **View details**.

Then, view invoice.



QuickView (View Westlaw Usage Details)

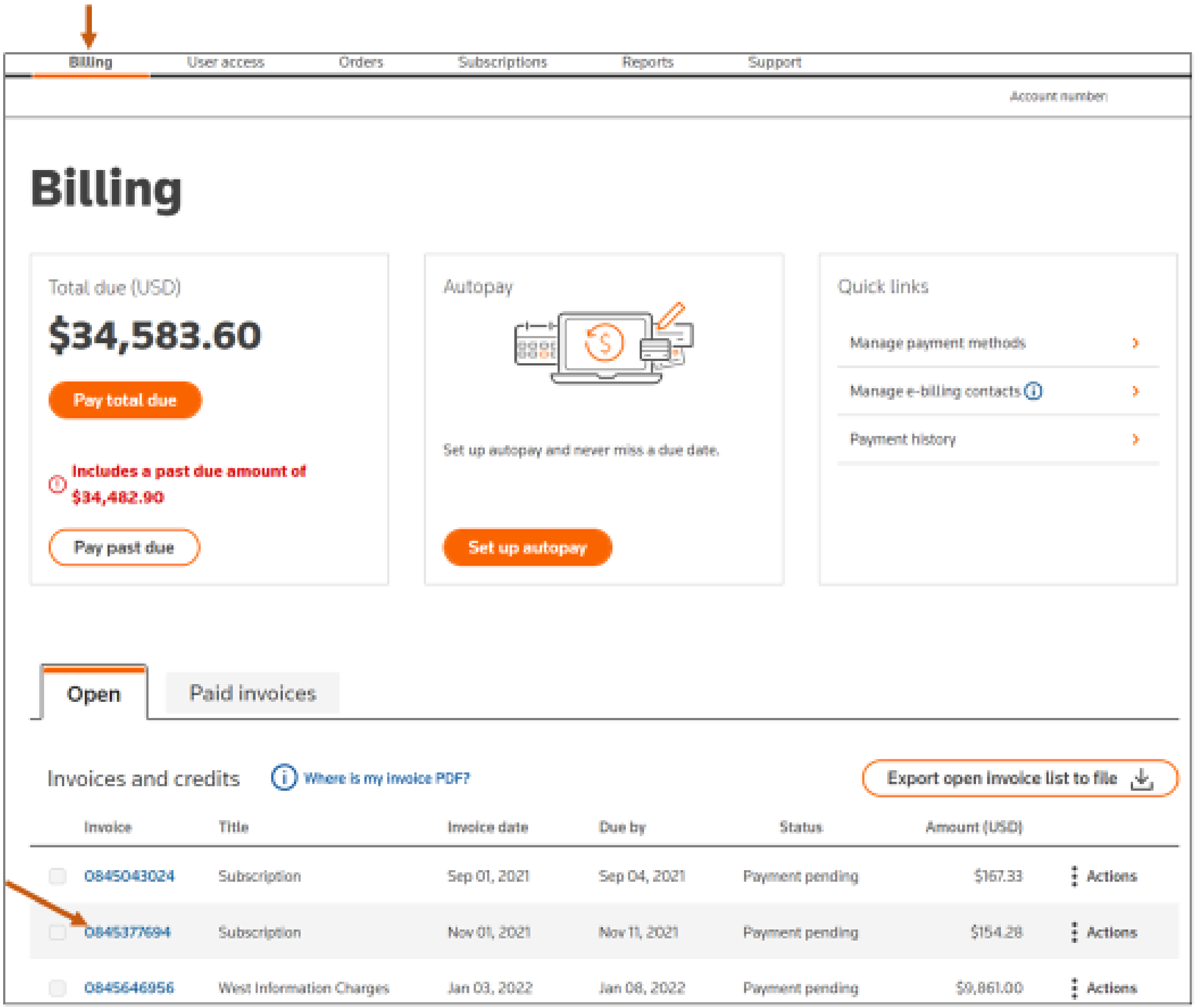
To view specific usage details on Westlaw invoices, navigate to the Invoice and click **Show itemized charges in QuickView+**.

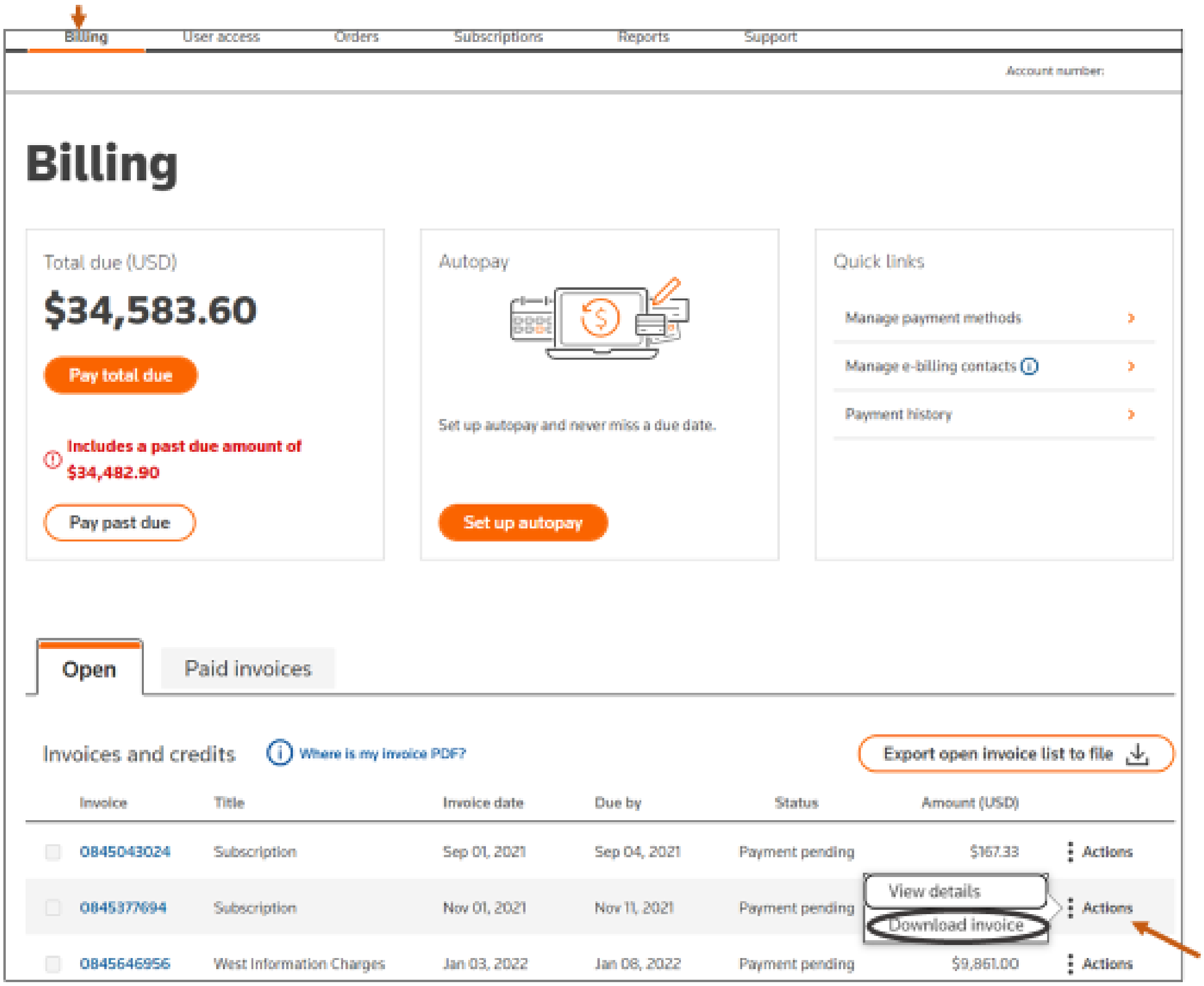


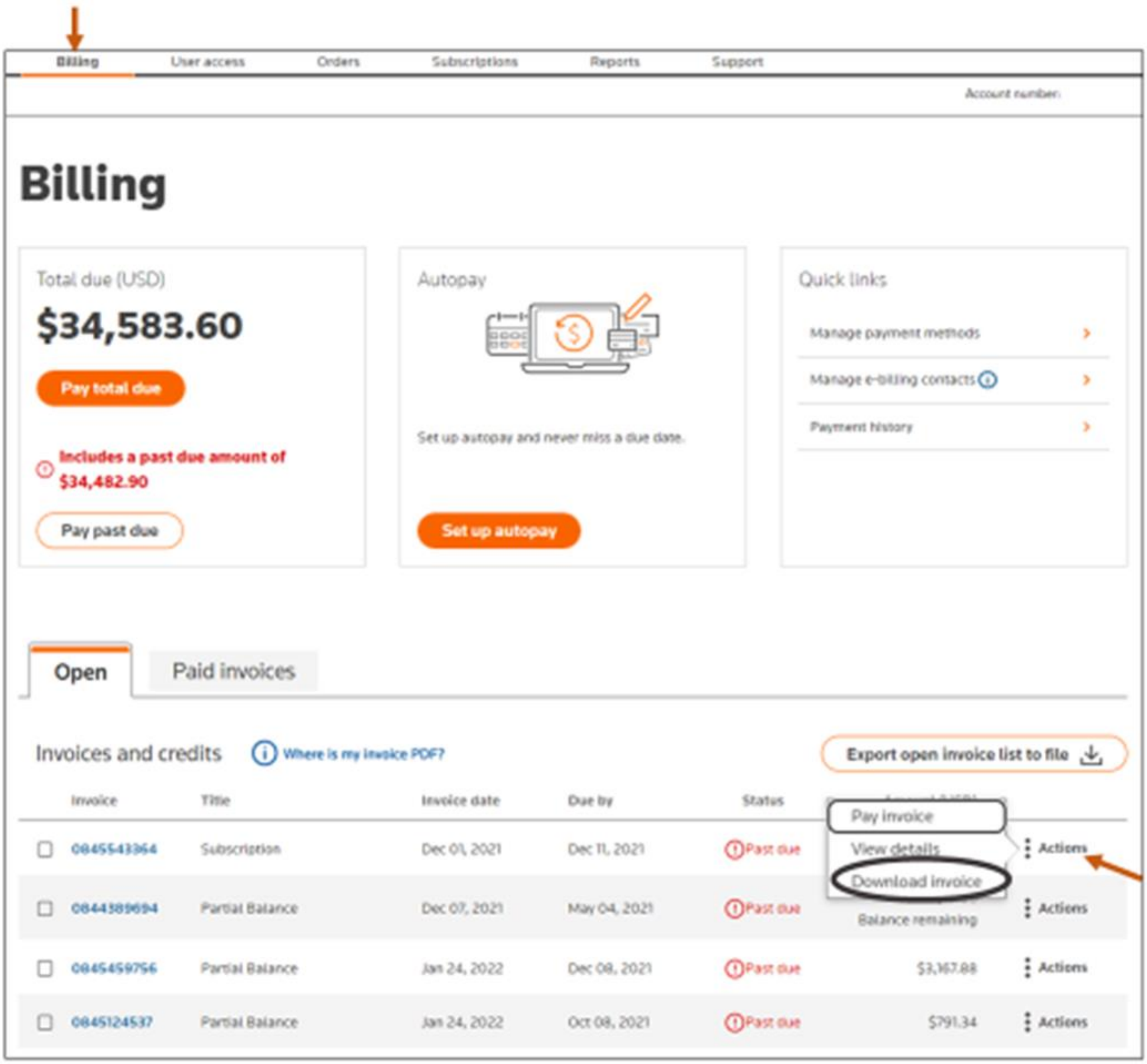
Next, you will be directed to the QuickView+ website. Sign-in with your OnePass account by clicking the **Sign On** button.

Download Invoice (PDF)

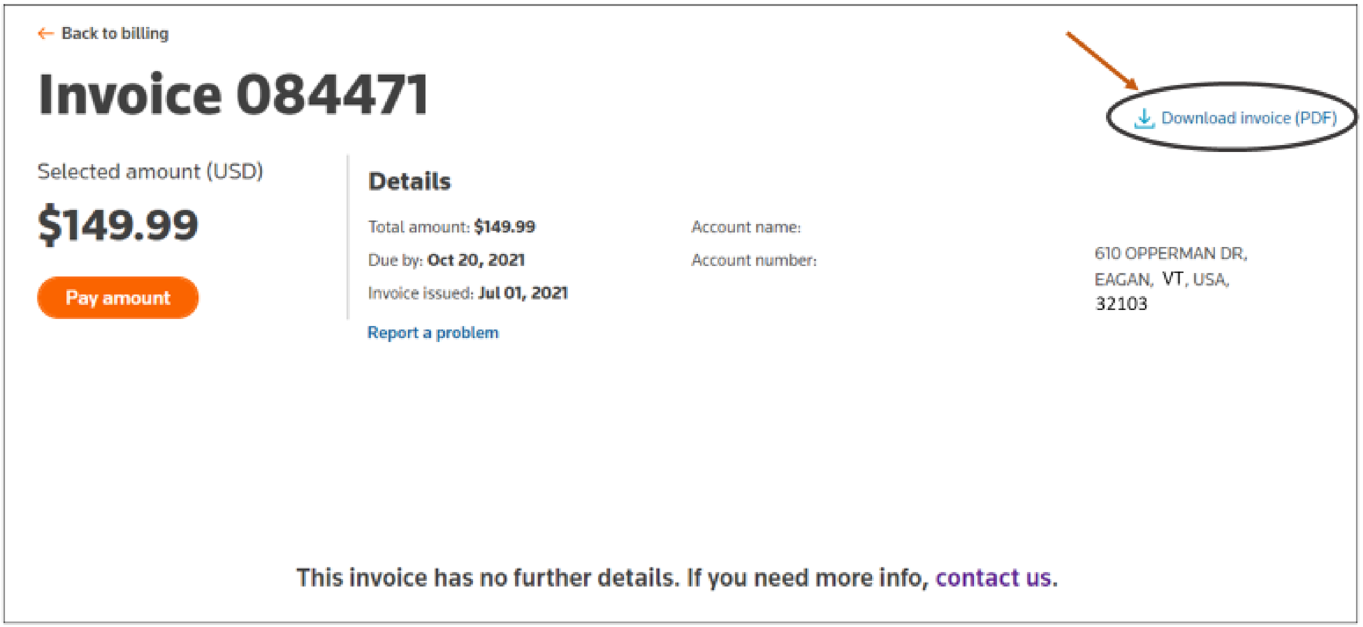
To download invoices in payment past due or processing status, navigate to the **Billing** tab and then either: 1) click on the invoice number that you want to view (as in the first image below) or 2) click on **Actions** and select **Download invoice** (as in the second and third images below).



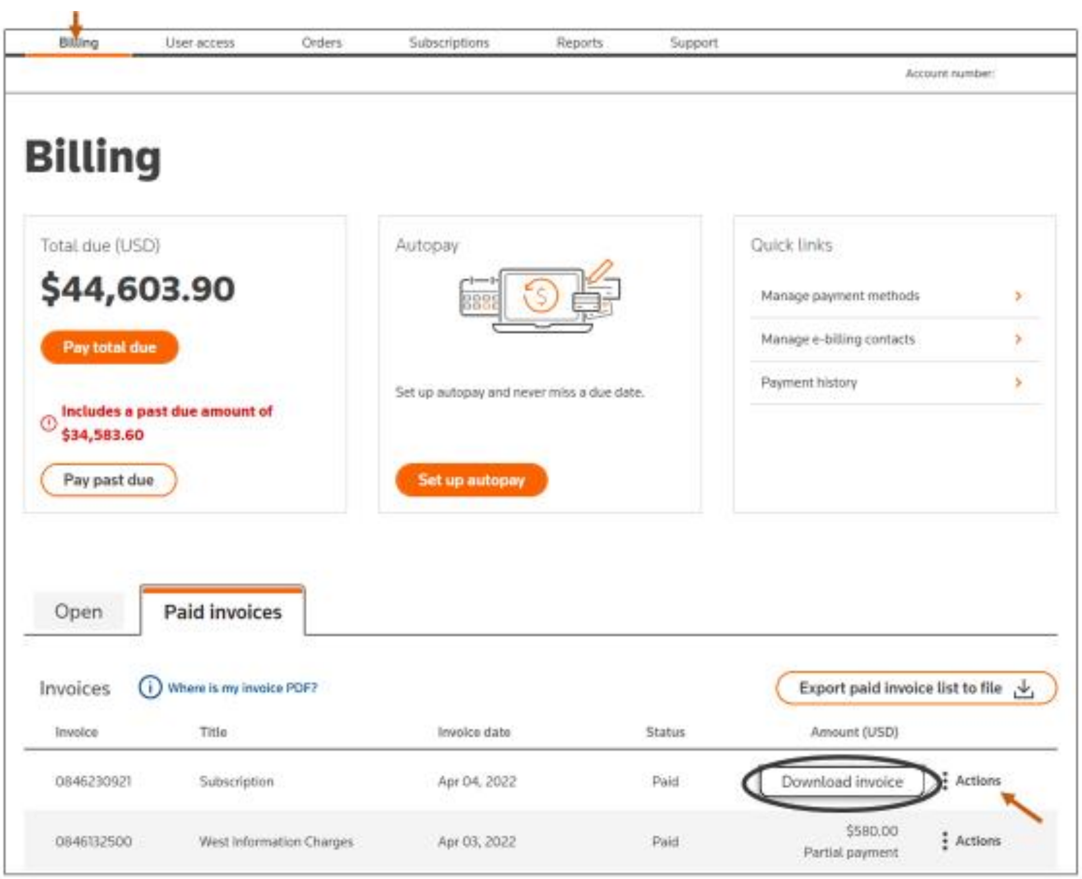

Billing
User access
Orders
Subscriptions
Reports
Support
Account number:
Billing
Total due (USD)
$34,583.60
Pay total due
Includes a past due amount of $34,482.90
Pay past due
Autopay
Set up autopay and never miss a due date.
Set up autopay
Quick links
Manage payment methods
Manage e-billing contacts
Payment history
Open
Paid invoices
Invoices and credits
Where is my invoice PDF?
Export open invoice list to file
Invoice
Title
Invoice date
Due by
Status
Amount (USD)
0845043024
Subscription
Sep 01, 2021
Sep 04, 2021
Payment pending
$167.33
Actions
0845377694
Subscription
Nov 01, 2021
Nov 11, 2021
Payment pending
View details
Download invoice
Actions
0845646956
West Information Charges
Jan 03, 2022
Jan 08, 2022
Payment pending
$9,861.00
Actions


Billing
User access
Orders
Subscriptions
Reports
Support
Account number:
Billing
Total due (USD)
$34,583.60
Pay total due
Includes a past due amount of $34,482.90
Pay past due
Autopay
Set up autopay and never miss a due date.
Set up autopay
Quick links
Manage payment methods
Manage e-billing contacts
Payment history
Open
Paid invoices
Invoices and credits
Where is my invoice PDF?
Export open invoice list to file
Invoice
Title
Invoice date
Due by
Status
Pay invoice
View details
Download invoice
Actions
0845543364
Subscription
Dec 01, 2021
Dec 11, 2021
Past due
0844389694
Partial Balance
Dec 07, 2021
May 04, 2021
Balance remaining
0845459756
Jan 24, 2022
Dec 08, 2021
$3,167.88
0845124537
Oct 08, 2021
$791.34

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

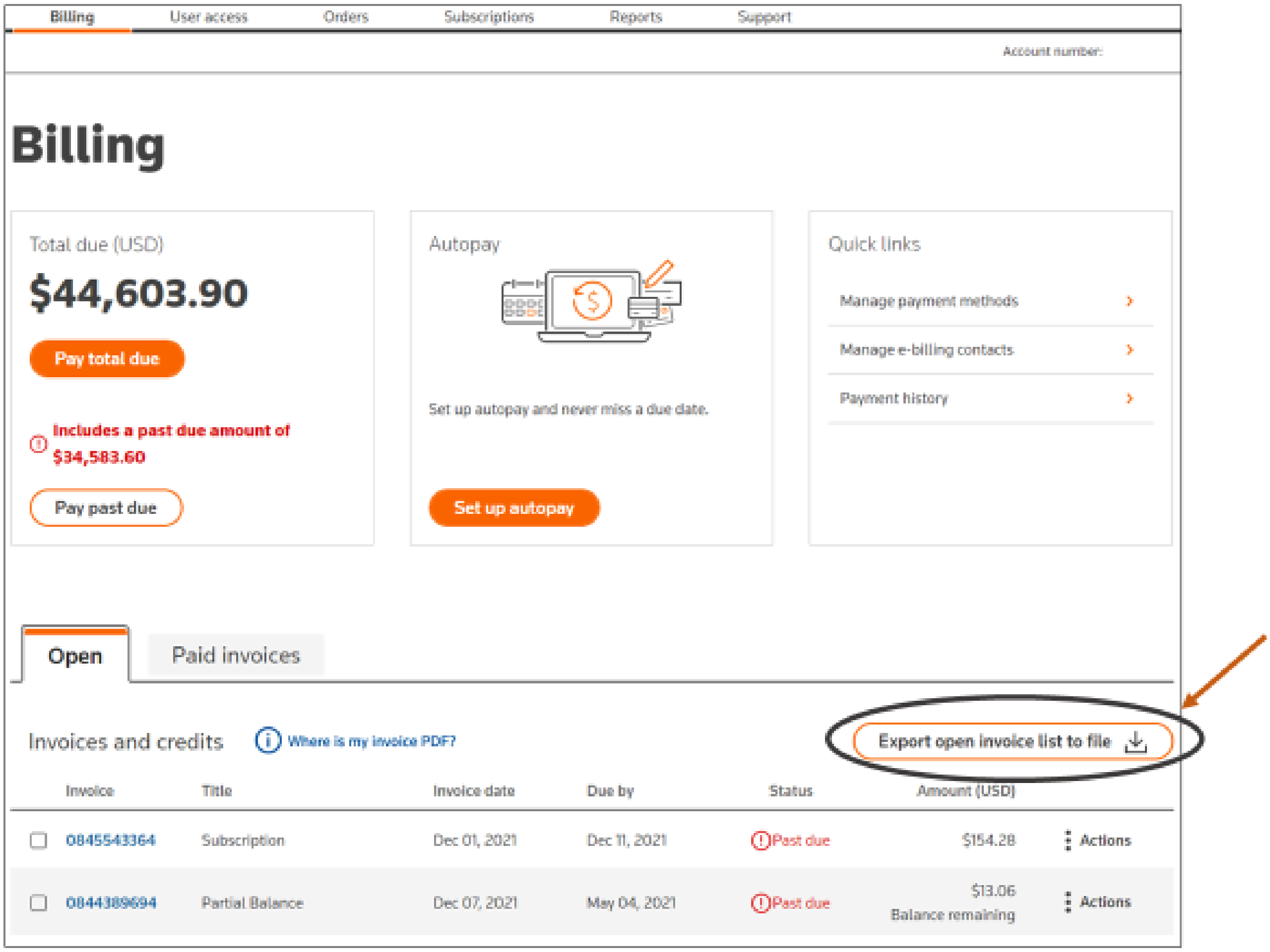


To download paid invoices, navigate to the **Billing** tab, then click the **Paid invoices** tab. Next, click on the **Actions** tab and select **Download invoice**.

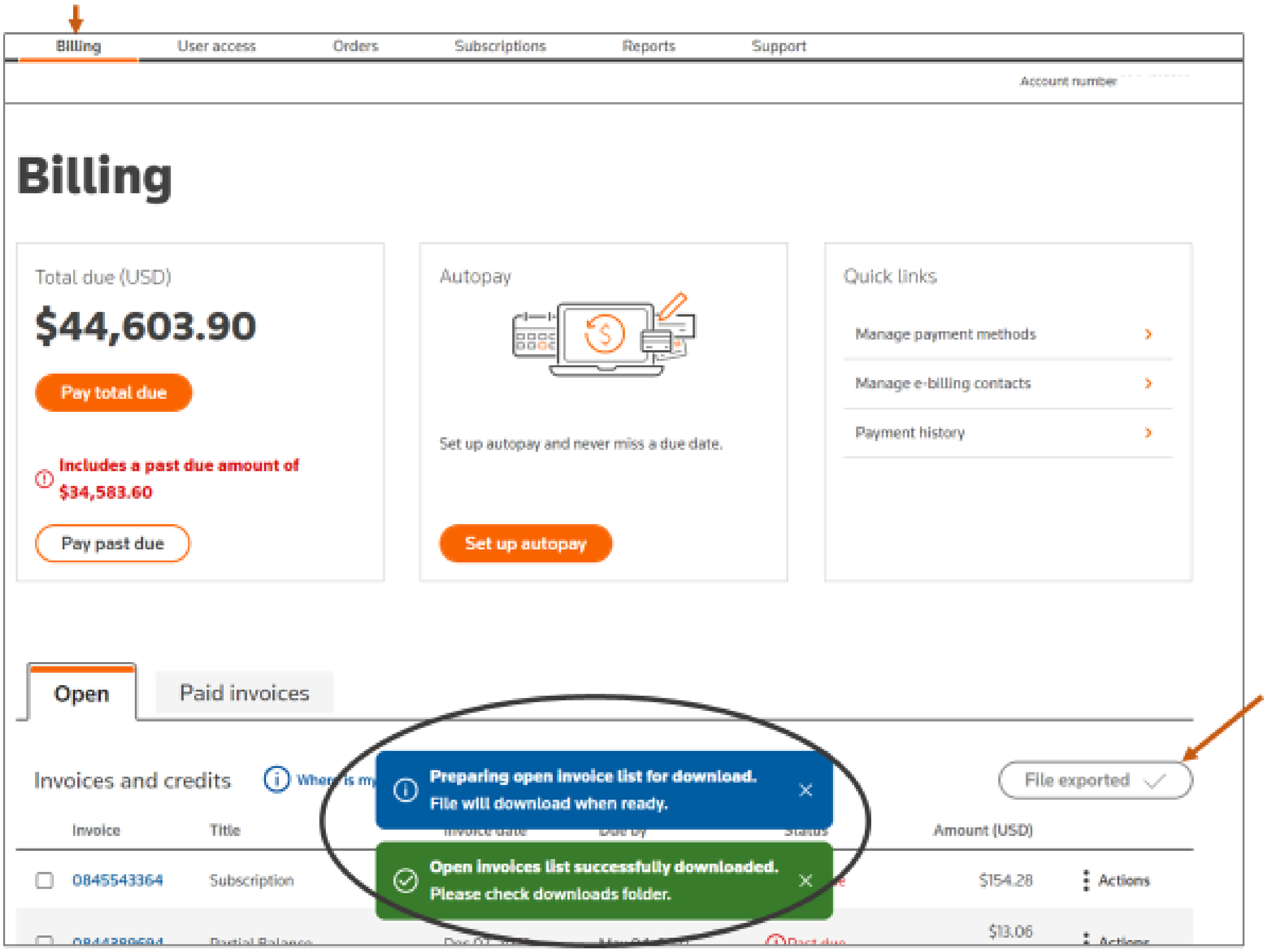


Export Open Invoice List to File

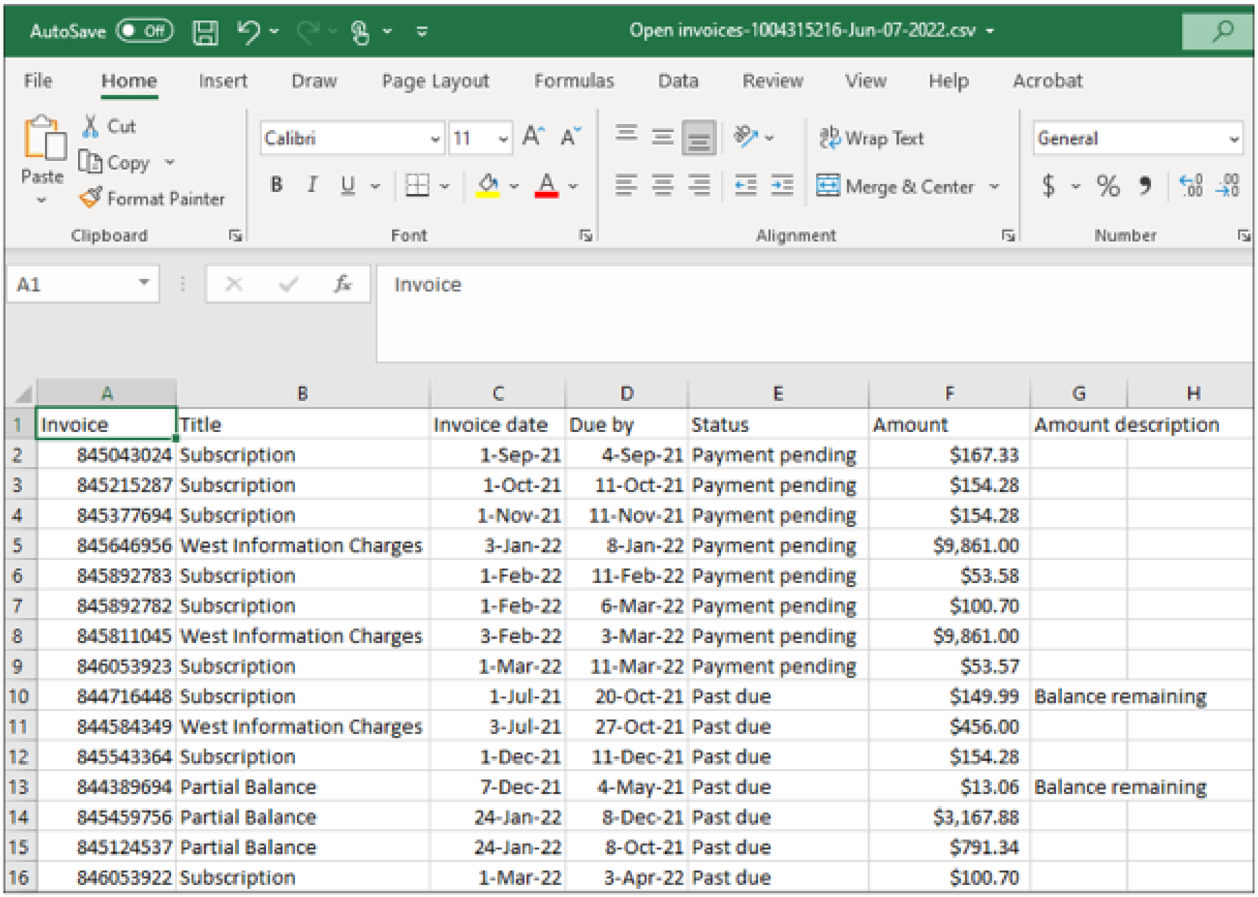
To view the open invoice list as an Excel document, navigate to the **Billing** tab. Next, click the **Open** tab. Then, click **Export open invoice list to file**.



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.



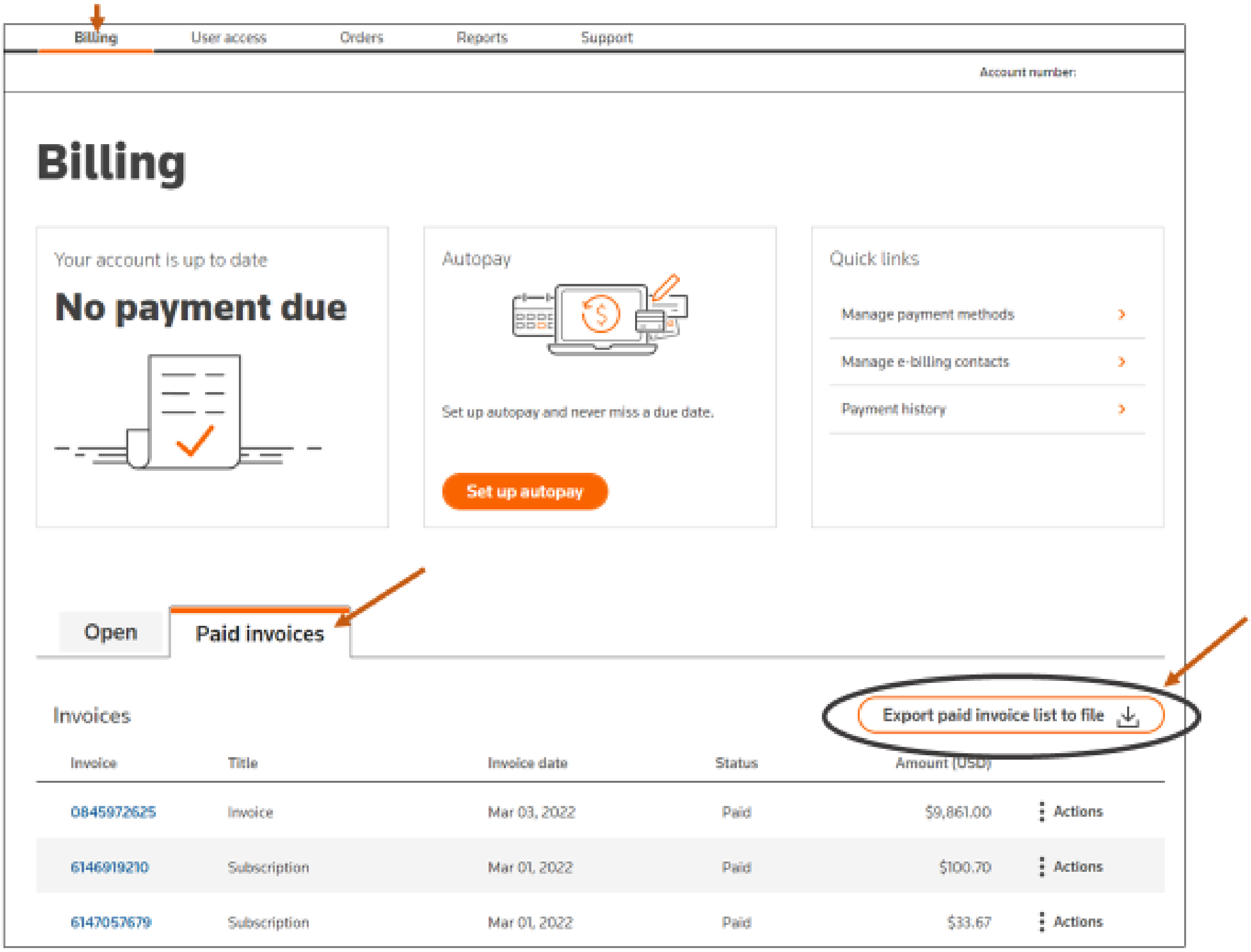
Once the green status box appears, open the download. The file will open as an Excel spreadsheet that looks similar to the one below. **Note, you may need to adjust the column widths to properly view the data**.



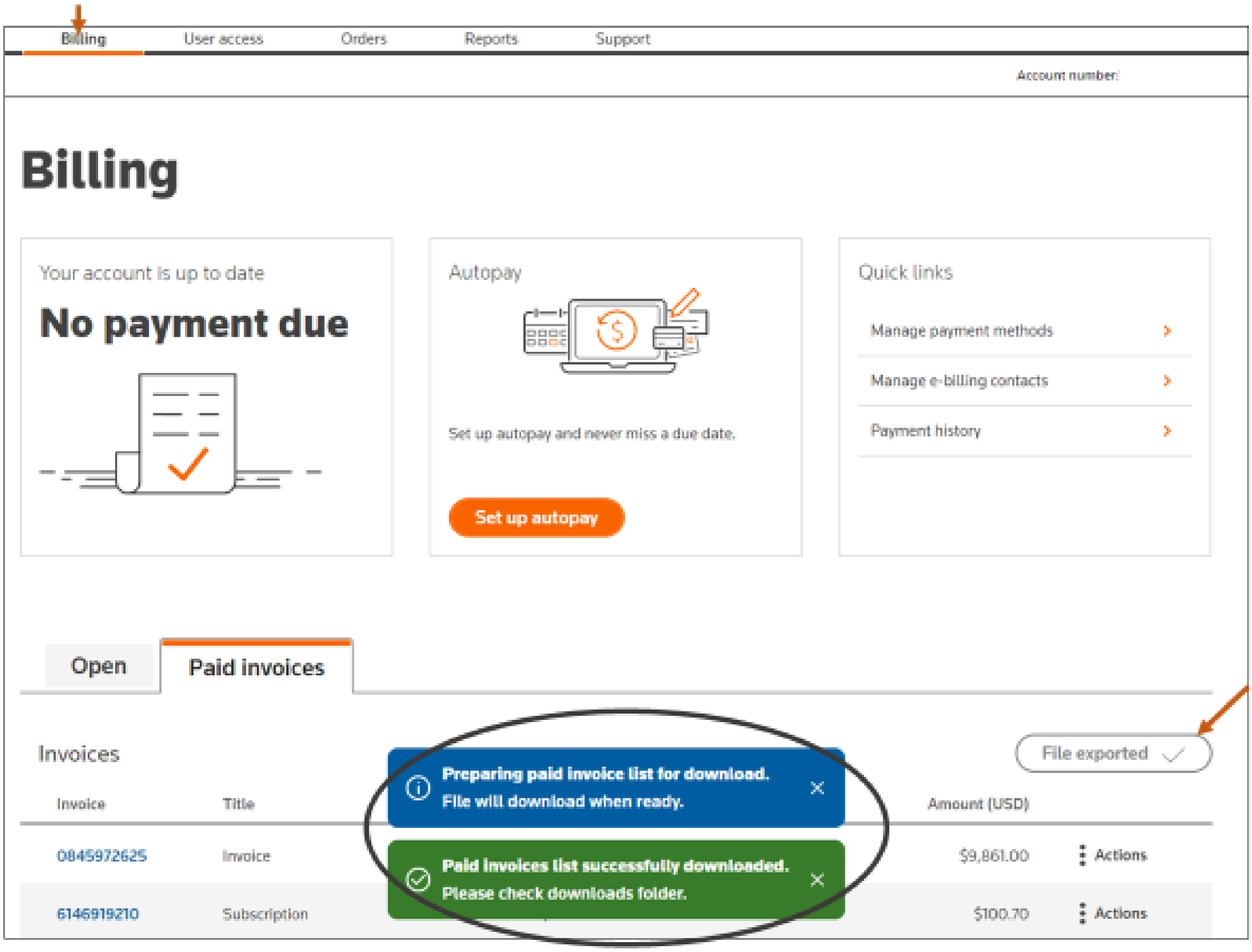
Invoice	Title	Invoice date	Due by	Status	Amount	Amount description
845043024	Subscription	1-Sep-21	4-Sep-21	Payment pending	$167.33	
845215287	Subscription	1-Oct-21	11-Oct-21	Payment pending	$154.28	
845377694	Subscription	1-Nov-21	11-Nov-21	Payment pending	$154.28	
845646956	West Information Charges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

Export Paid Invoice List to File

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



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.

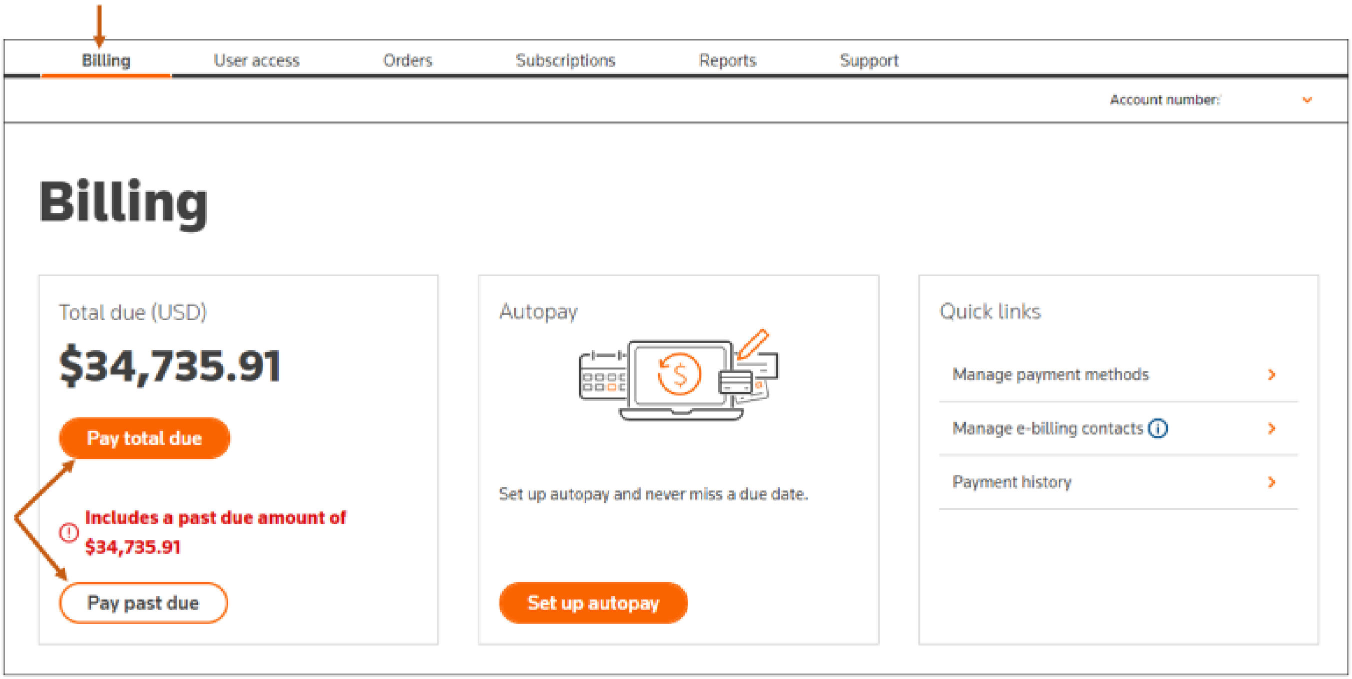


Make Payments

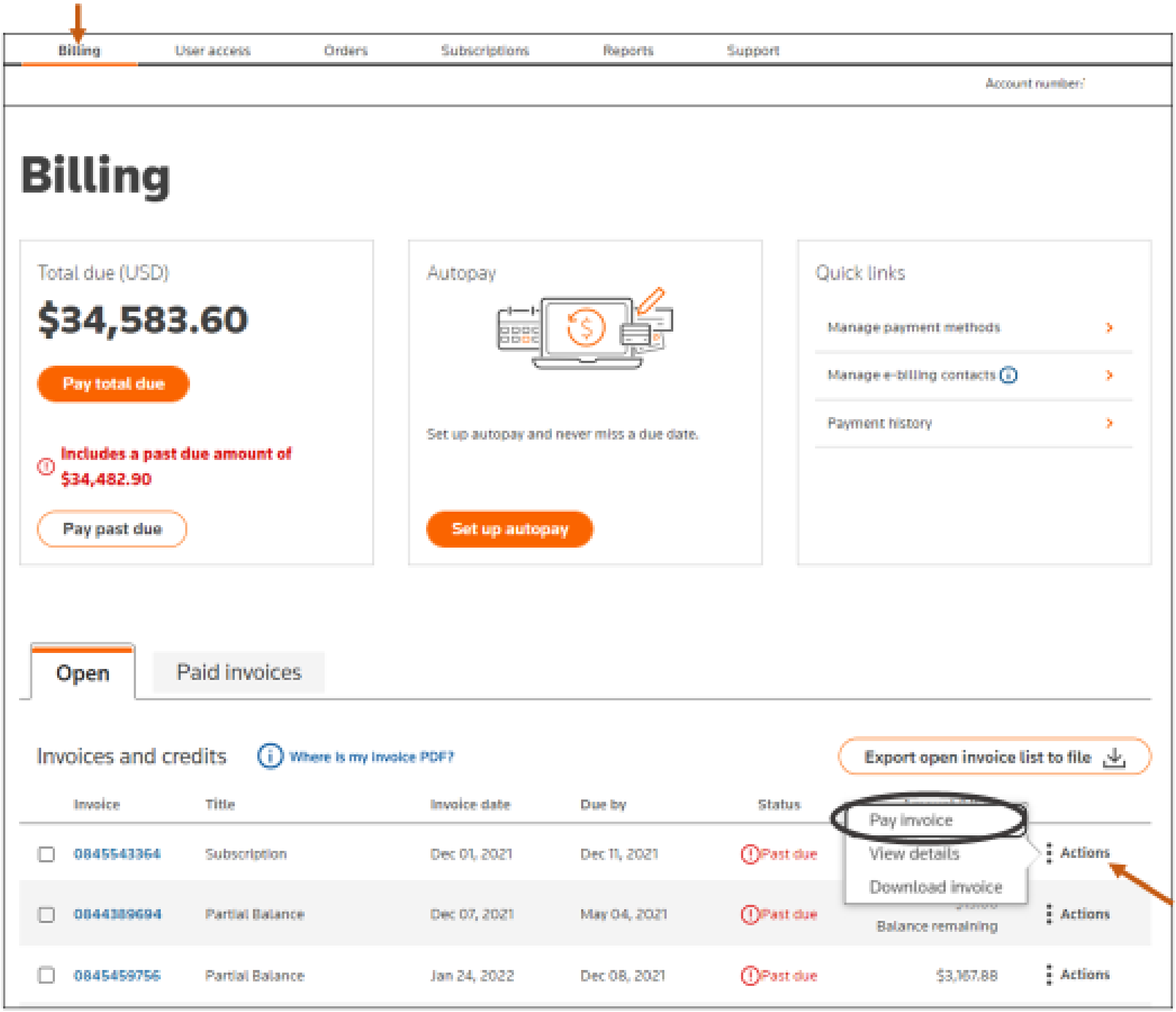
Pay total due, select invoices, or past due amounts

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

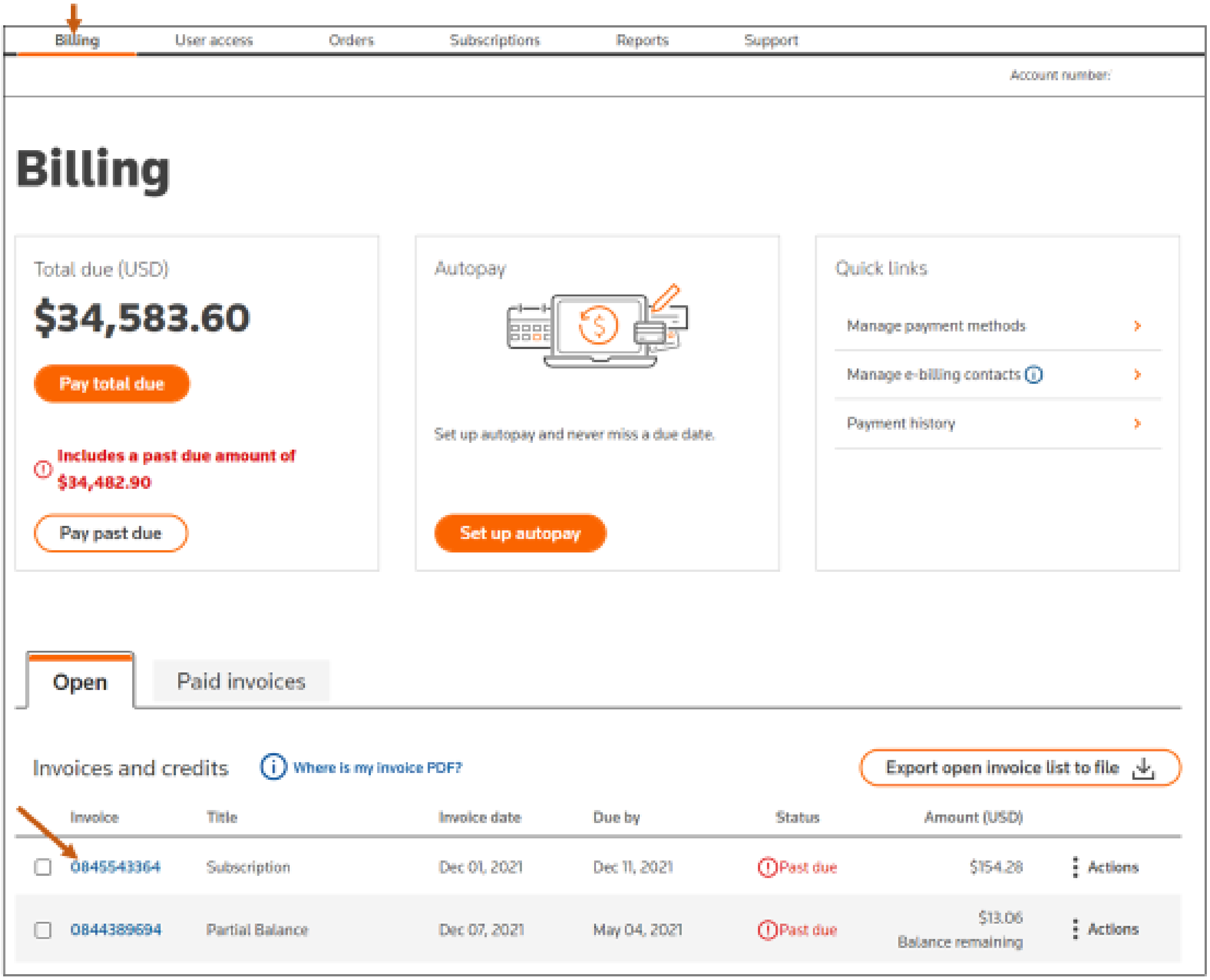
1) Click **Pay total due** or **Pay past due** on left-side box.



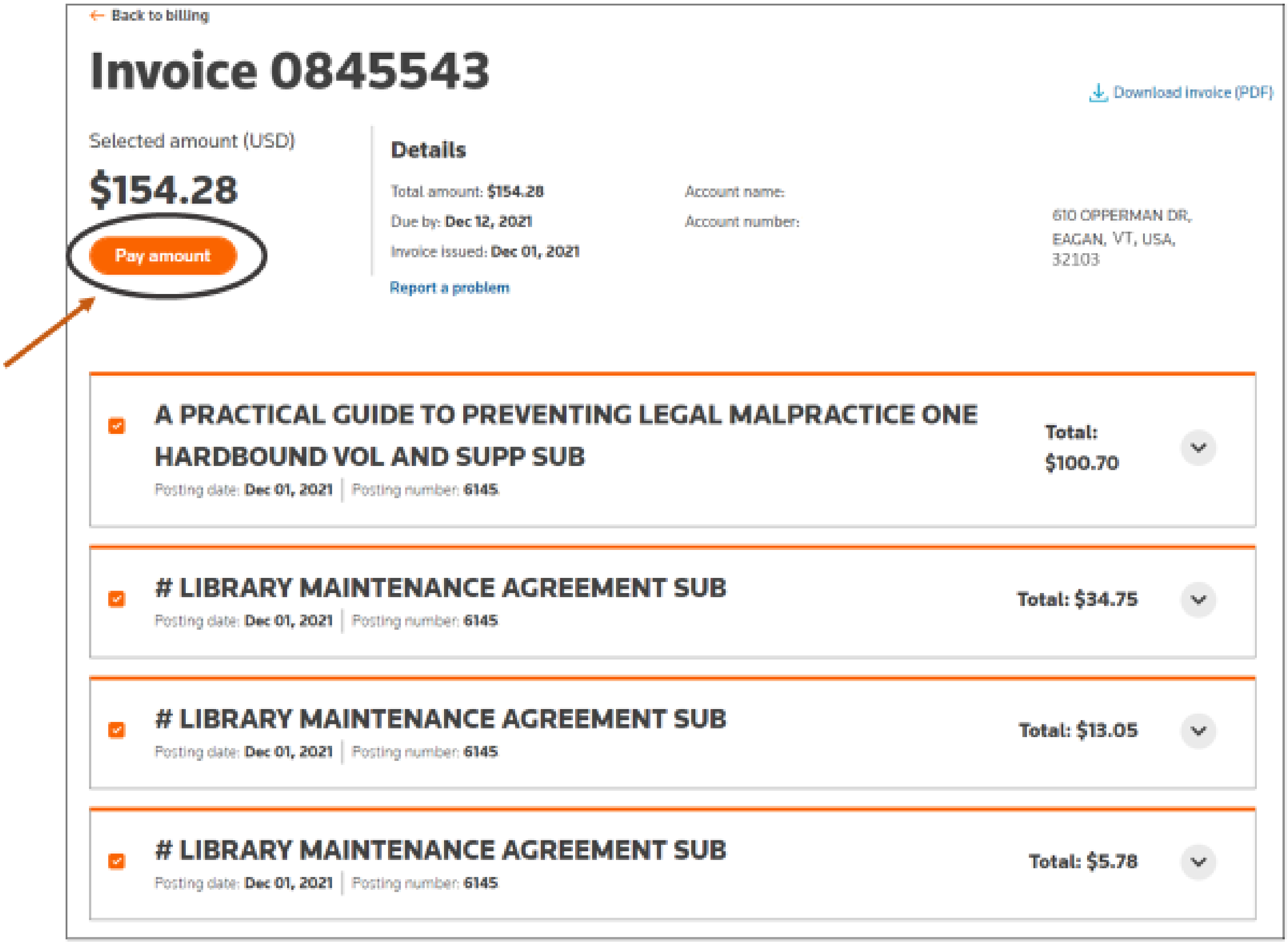
2) Click **Actions** from the **Open** tab and then select **Pay invoice**.



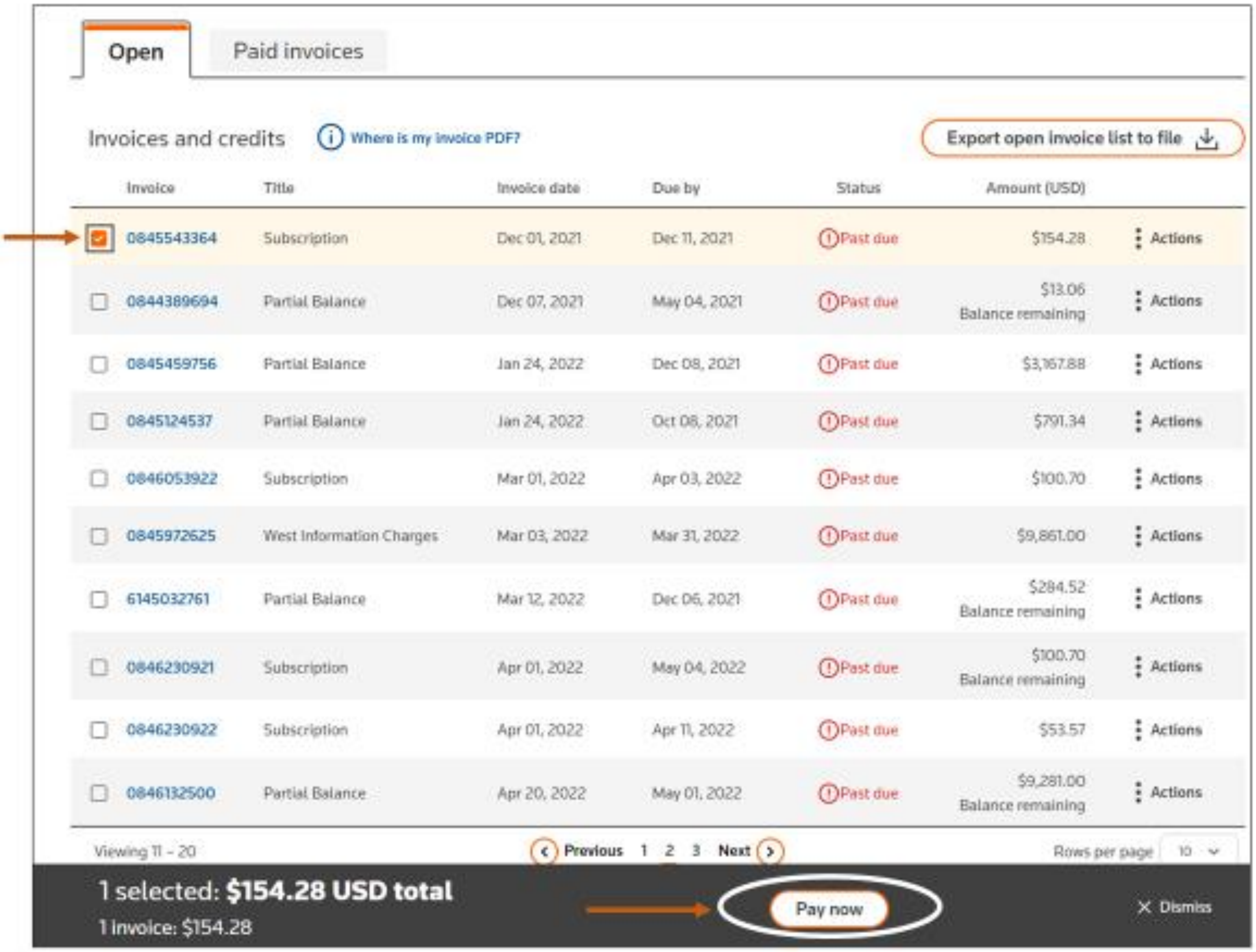
3) Click on the Invoice number from the **Open** tab.



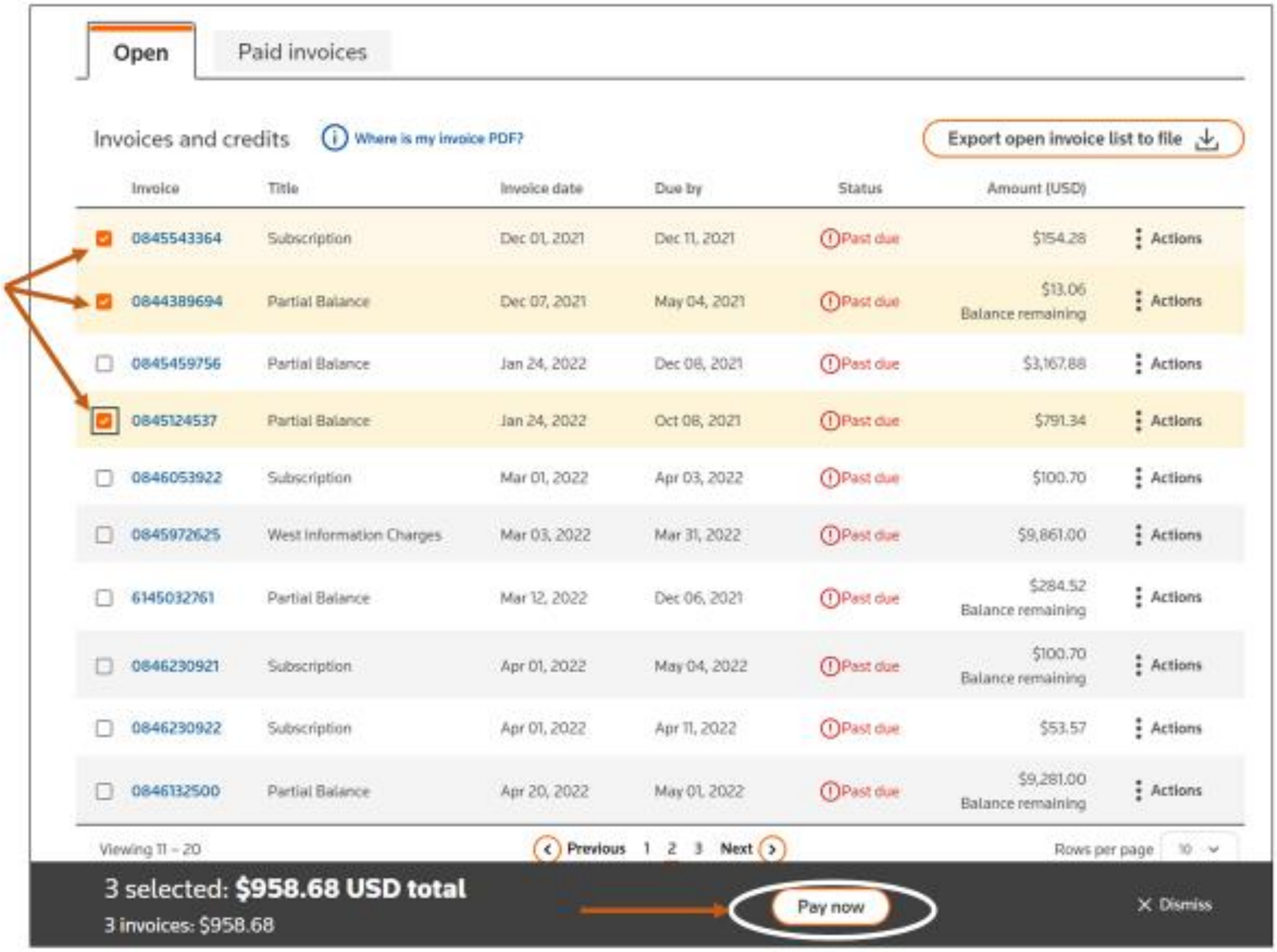
Next, click **Pay amount**.



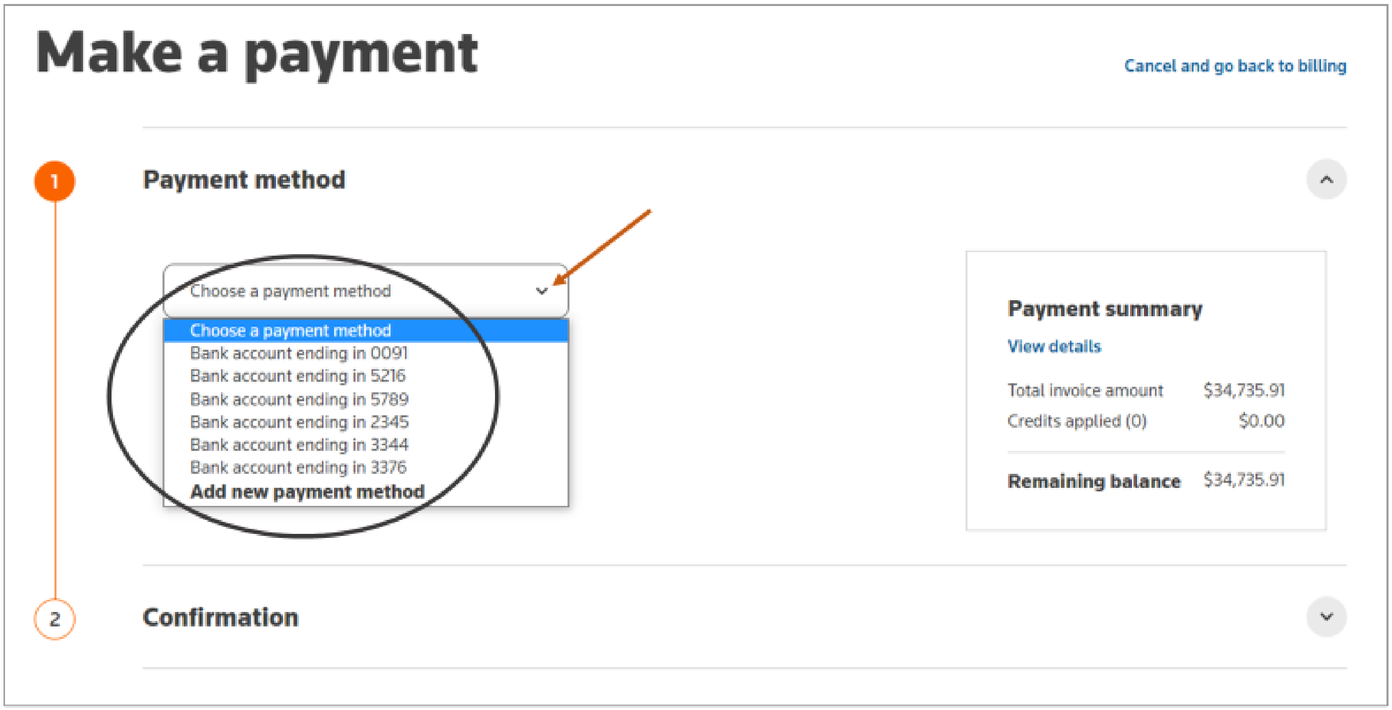
4) From the **Open** invoices tab, check the box next to the invoice you want to pay. Then, click **Pay now** on the bottom of the screen.



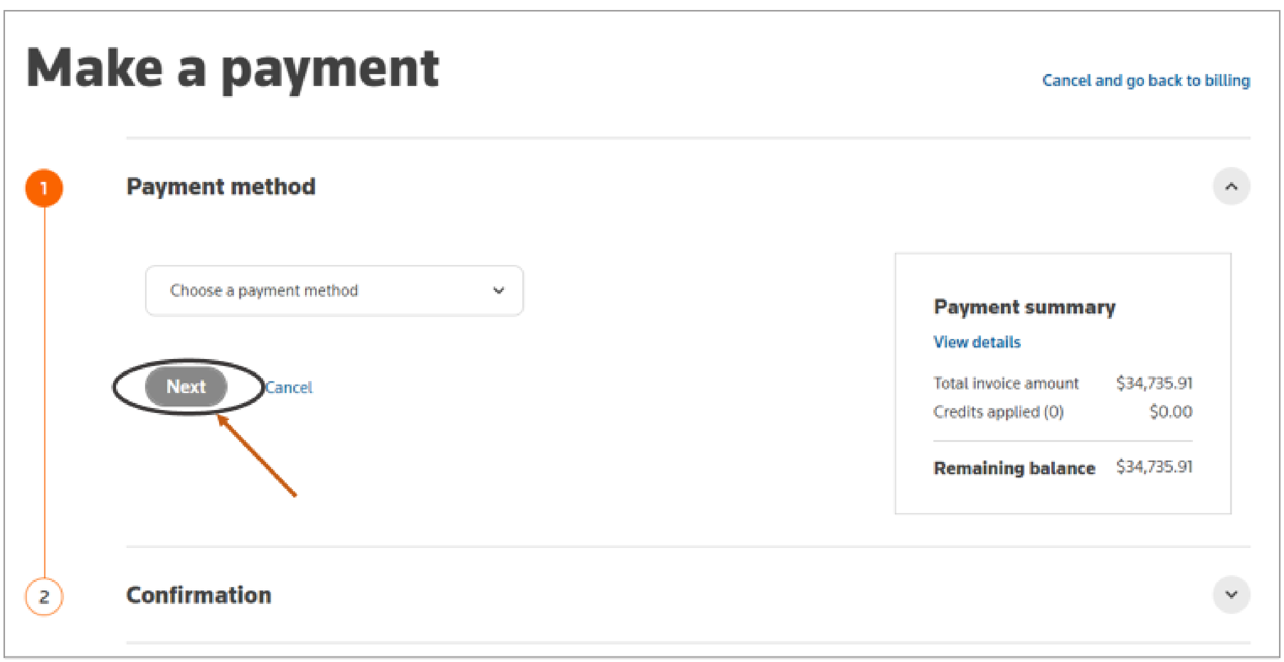
5) To pay multiple invoices at the same time, click the box next to each invoice number you want to pay from the **Open** invoices tab. Then, click **Pay now** on the bottom of the screen.



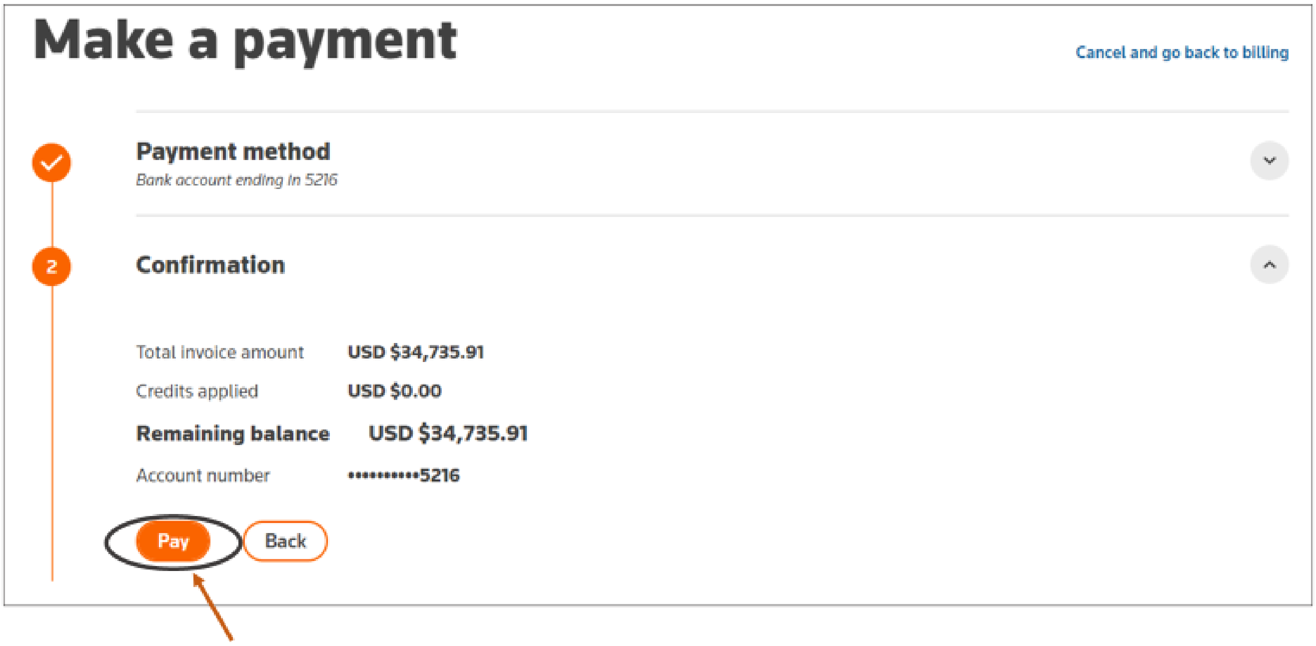
After taking one of the options above, select payment method from the dropdown menu.



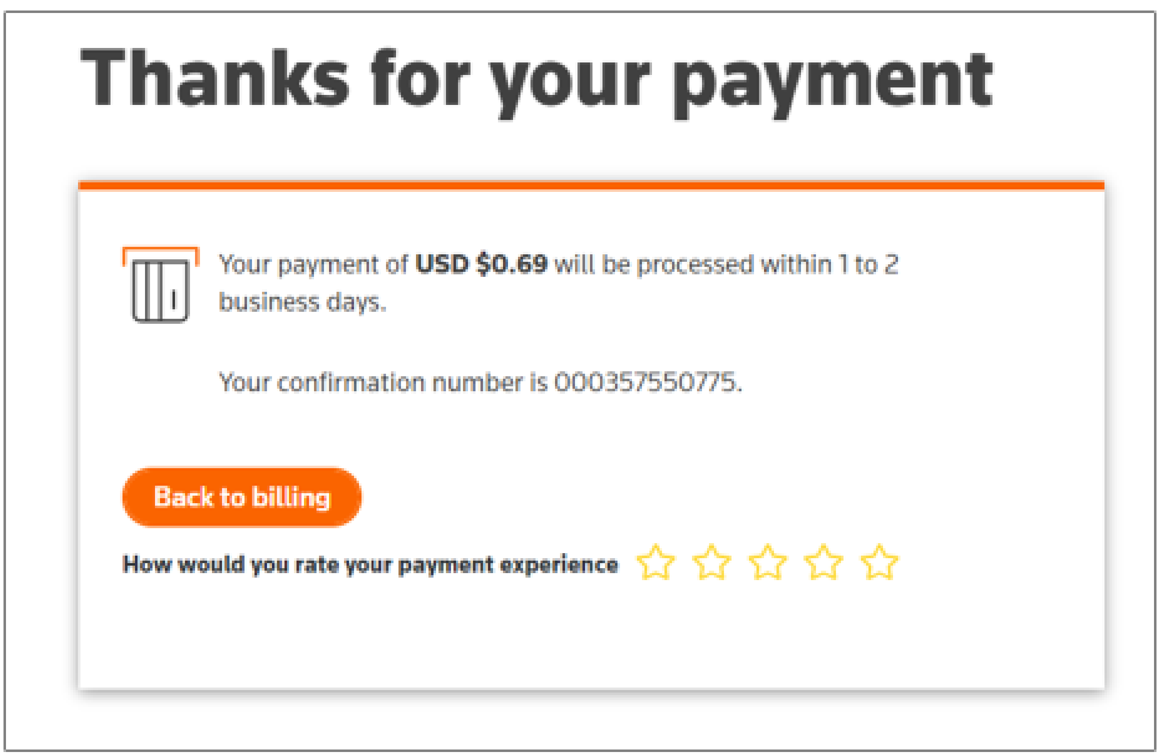
Then, click **Next**.



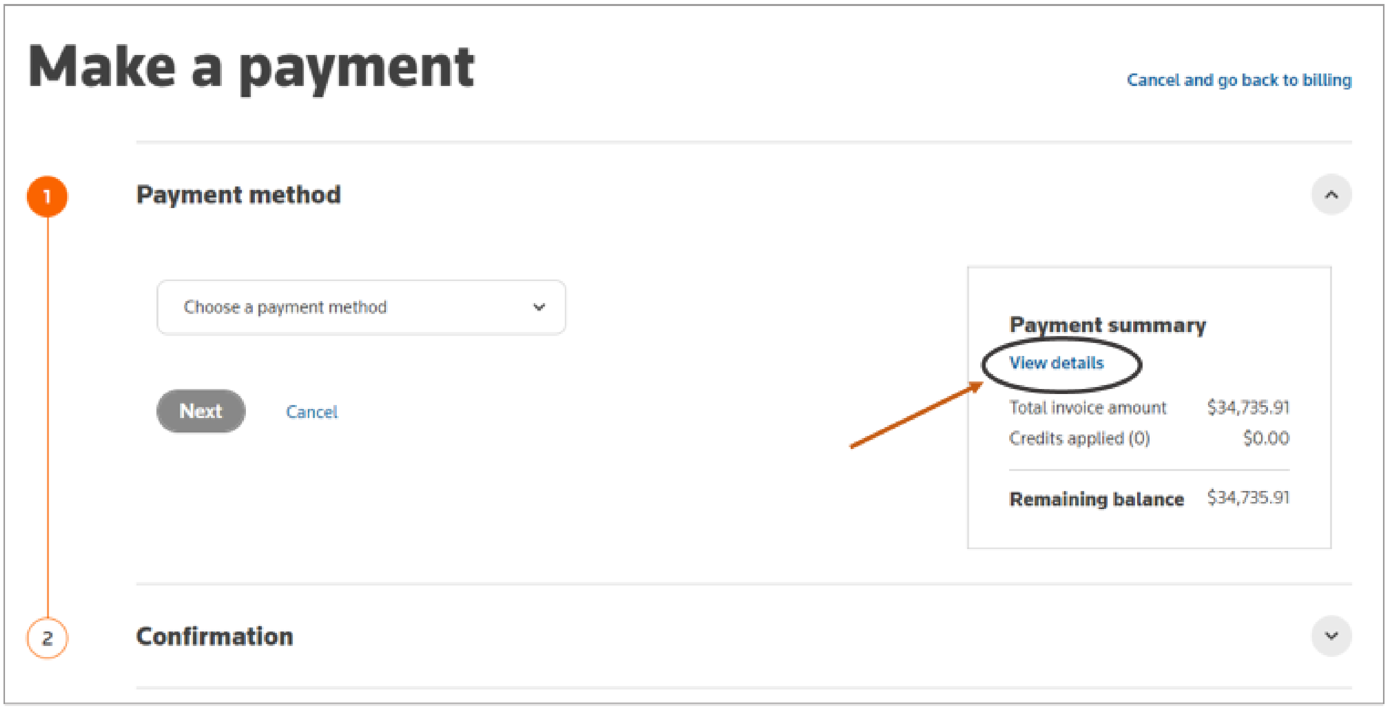
Next, click **Pay**.



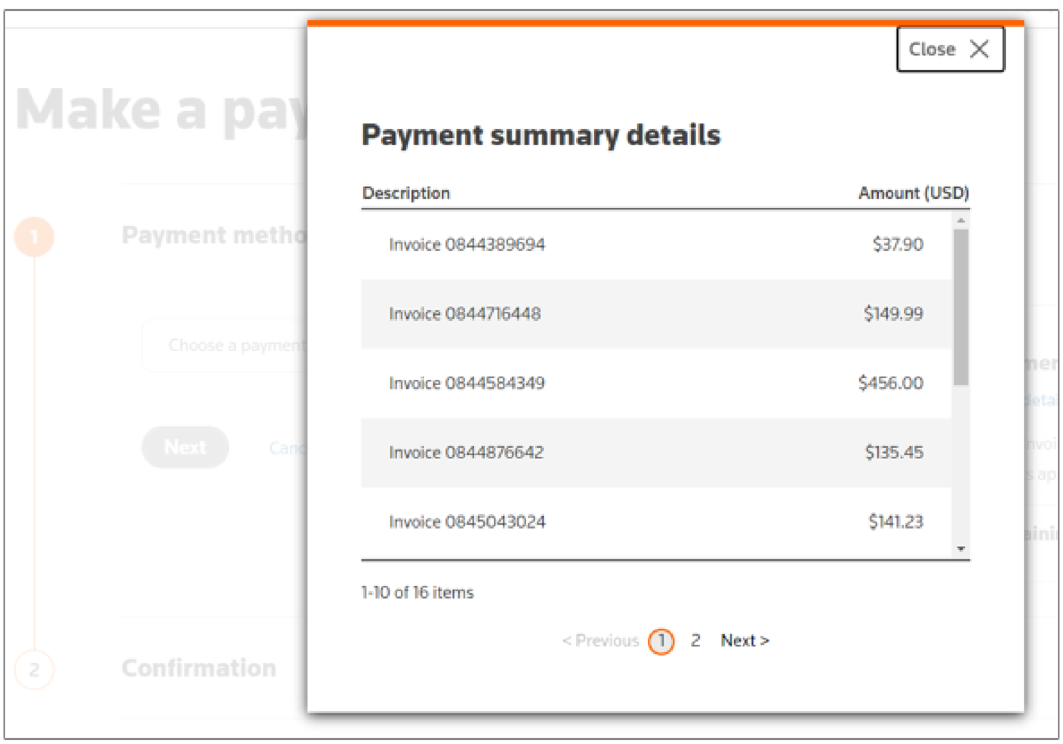
Then, you will see a popup window similar to the one below confirming that payment was made and offering the ability to provide feedback on the billing experience.



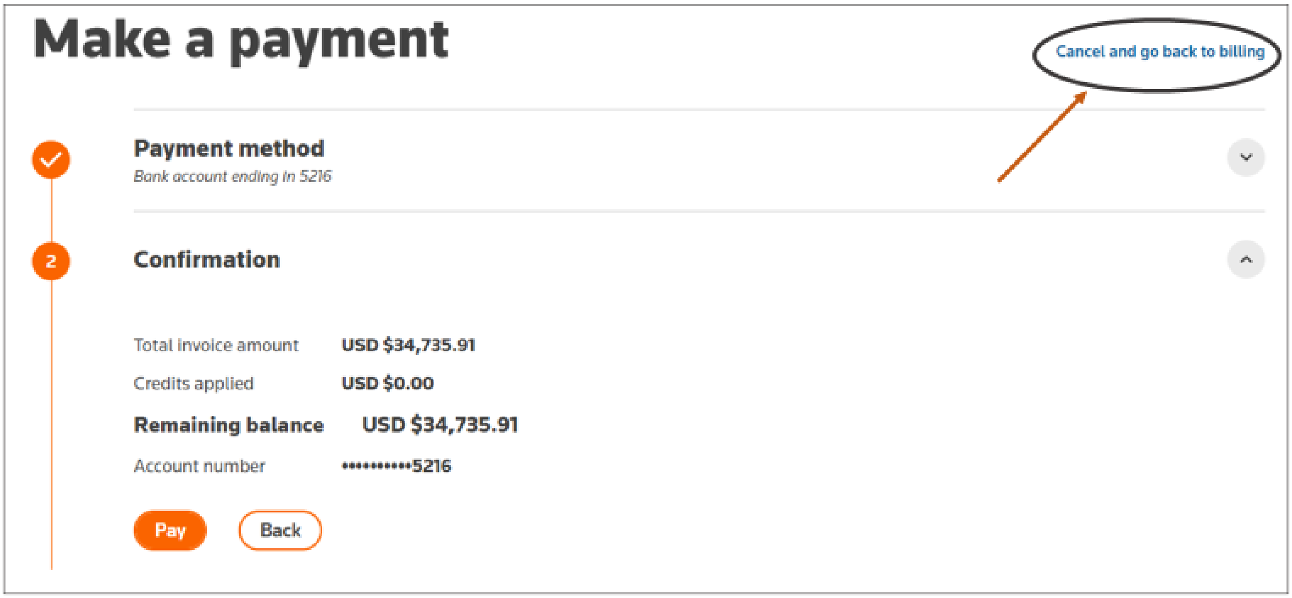
To view a summary of payment details before making a payment, click **View details** from the **Payment summary** box on the right side of the **Make a payment** page.



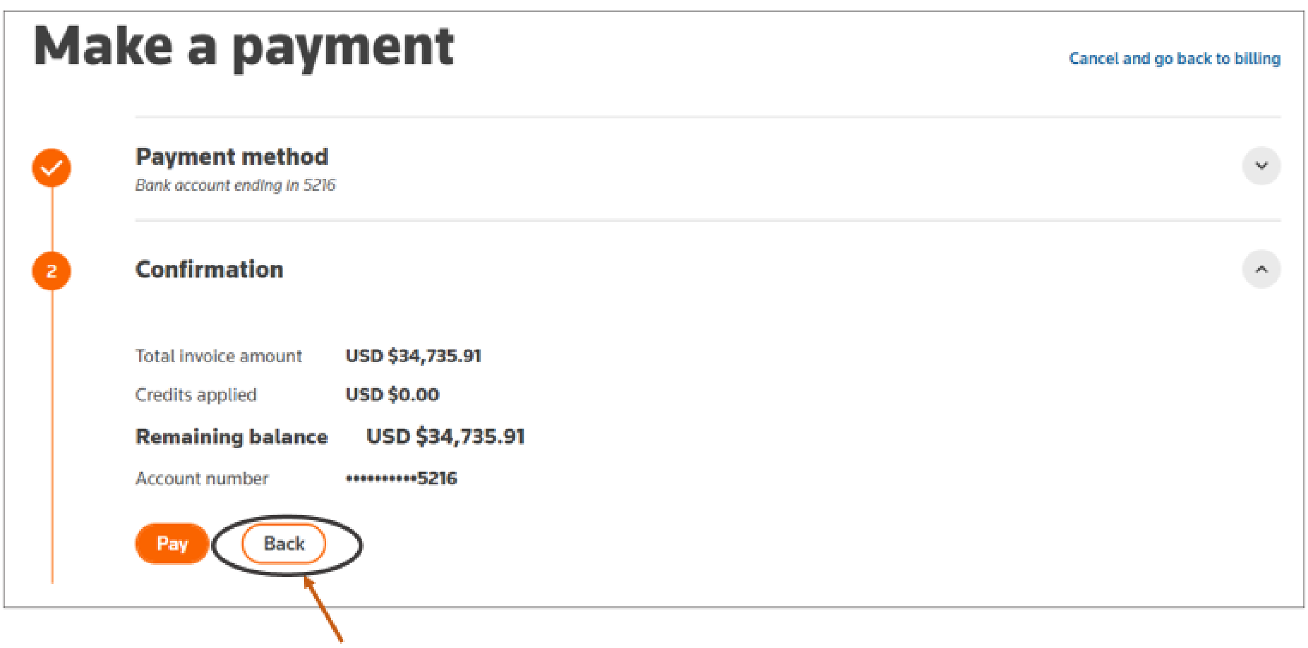
A popup window similar to the one below will provide the summary of payment details.



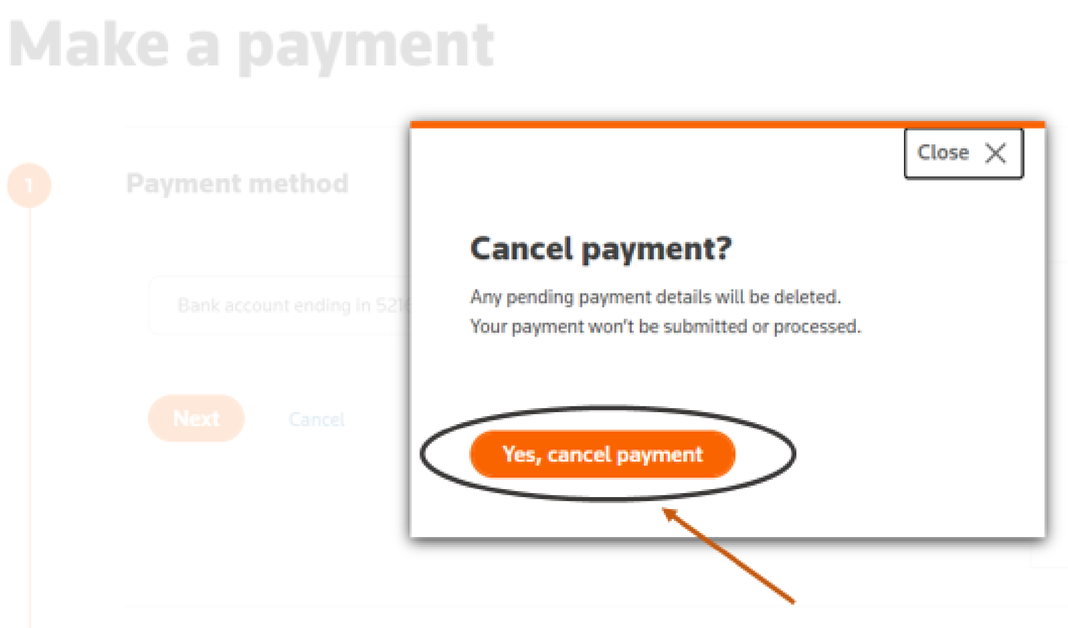
If you would like to cancel the payment process before clicking Pay on the Make a payment page, click on **Cancel and go back to billing**.



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

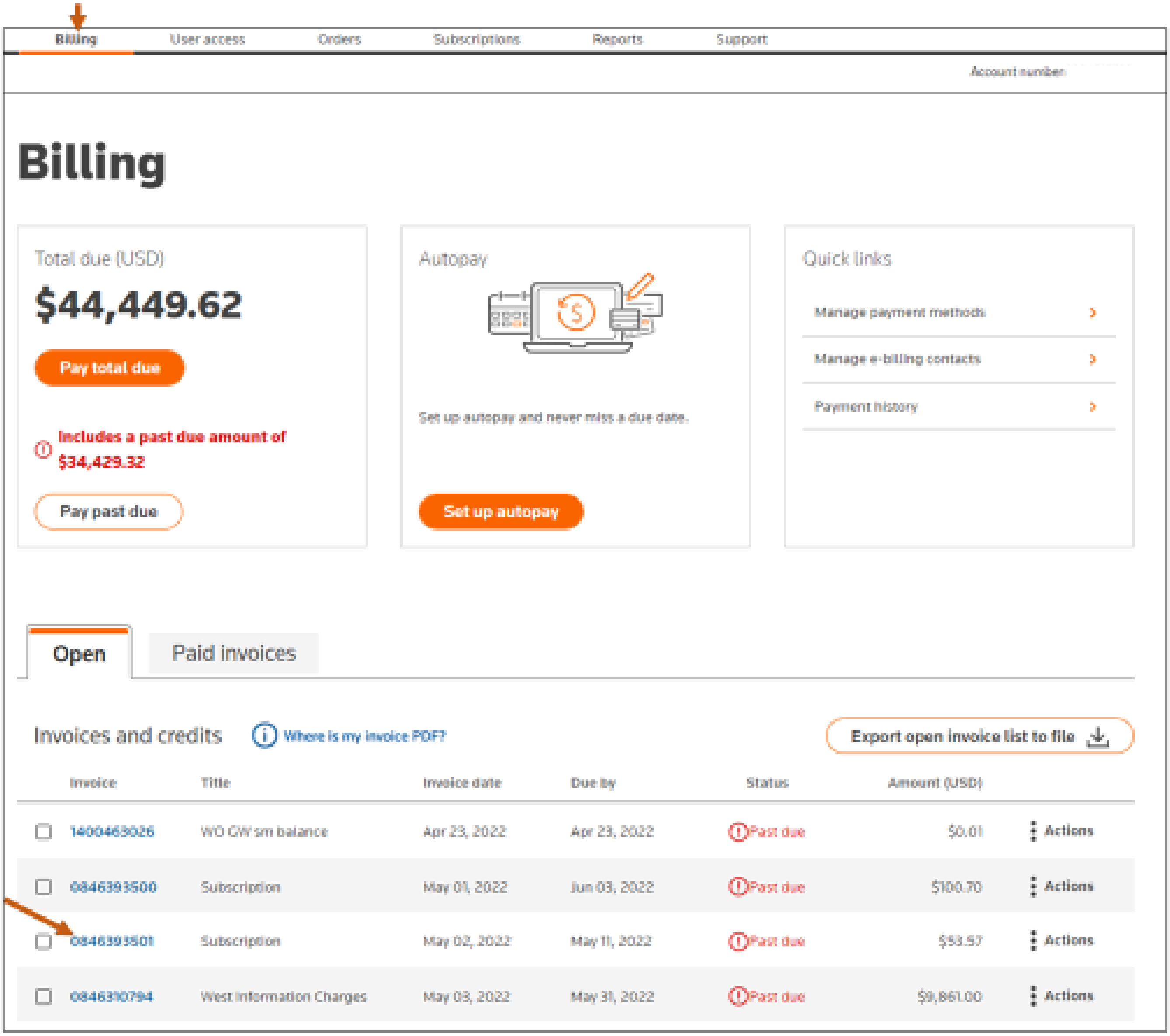


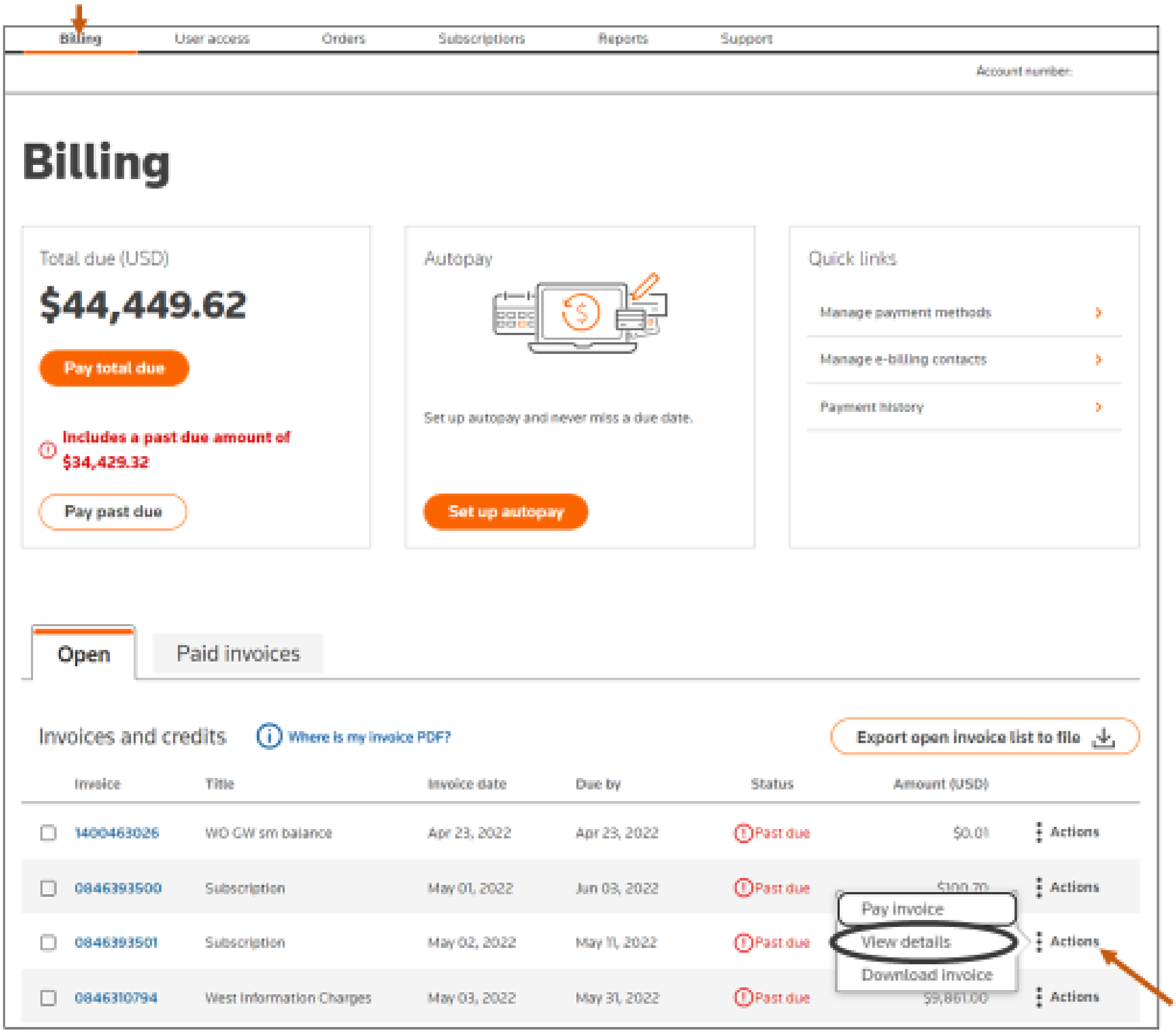
After either action above, click **Yes, cancel payment**.



Make a 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
User access
Orders
Subscriptions
Reports
Support
Account number:
Billing
Total due (USD)
$44,449.62
Pay total due
Includes a past due amount of $34,429.32
Pay past due
Autopay
Set up autopay and never miss a due date.
Set up autopay
Quick links
Manage payment methods
Manage e-billing contacts
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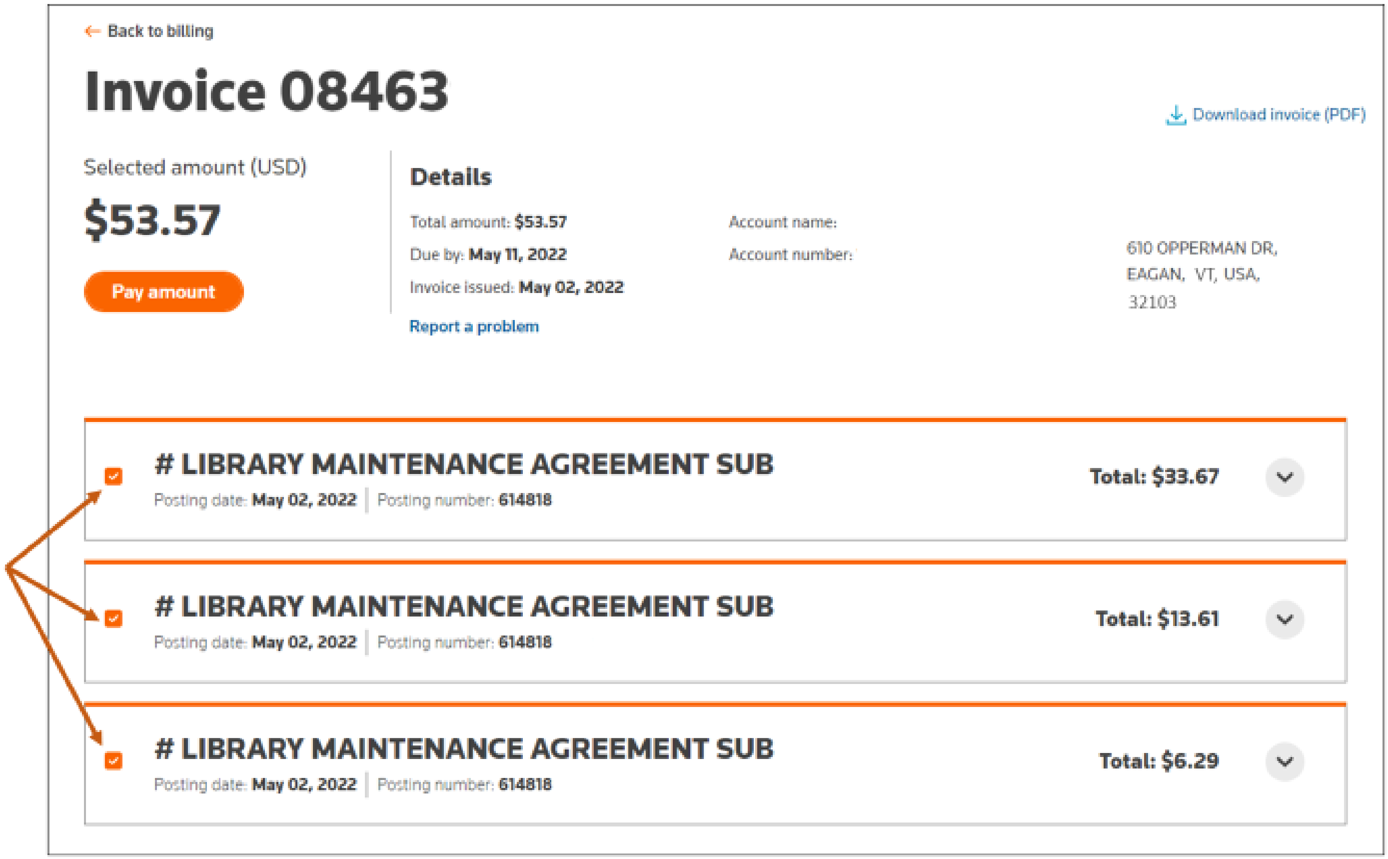
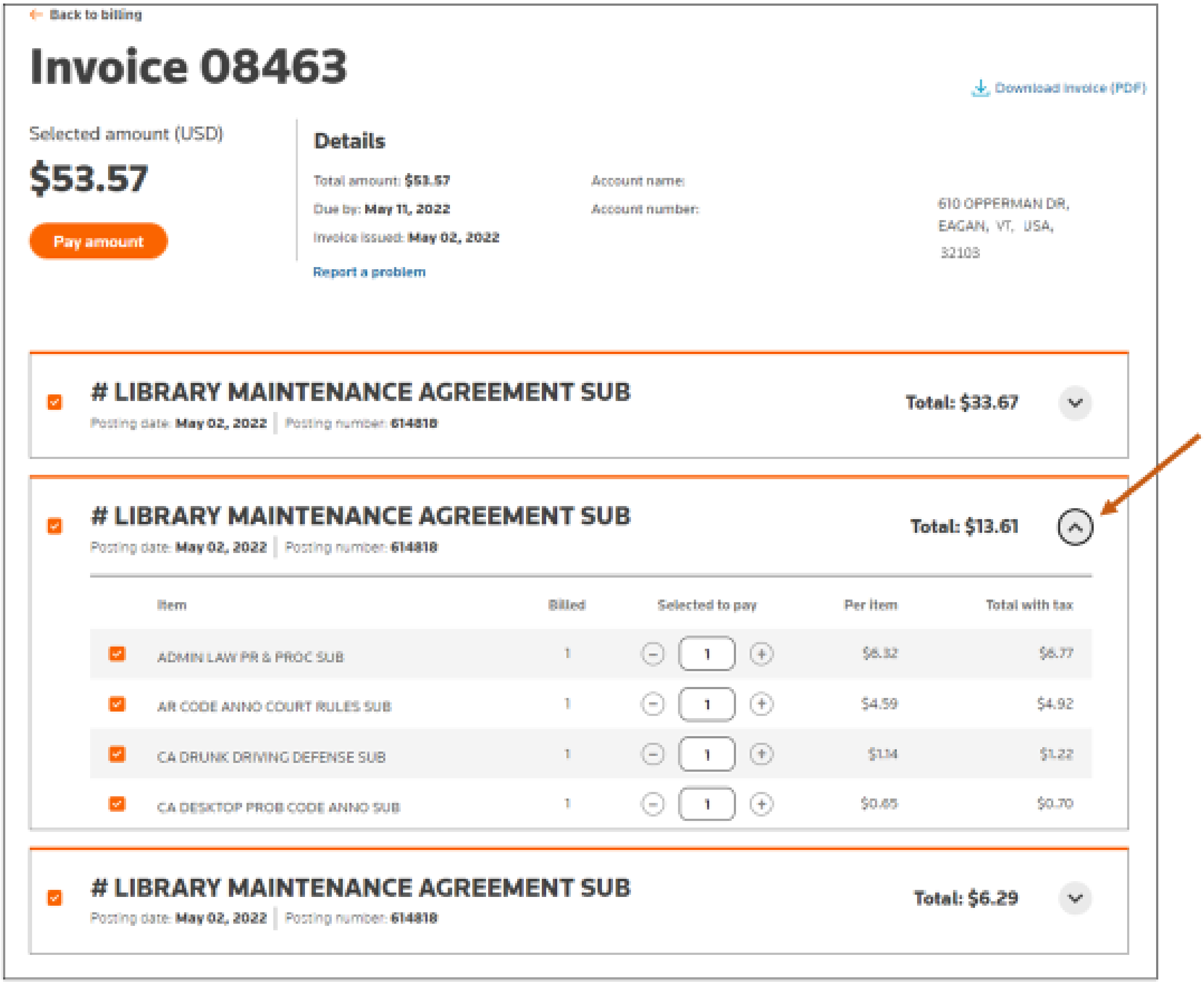
Export open invoice list to file
Invoice
Title
Invoice date
Due by
Status
Amount (USD)
1400463026
WO GW sm balance
Apr 23, 2022
Apr 23, 2022
Past due
$0.01
Actions
0846393500
Subscription
May 01, 2022
Jun 03, 2022
Past due
Actions
0846393501
Subscription
May 02, 2022
May 11, 2022
Past due
Actions
0846310794
West Information Charges
May 03, 2022
May 31, 2022
Past due
$9,861.00
Actions
Pay invoice
View details
Download invoice

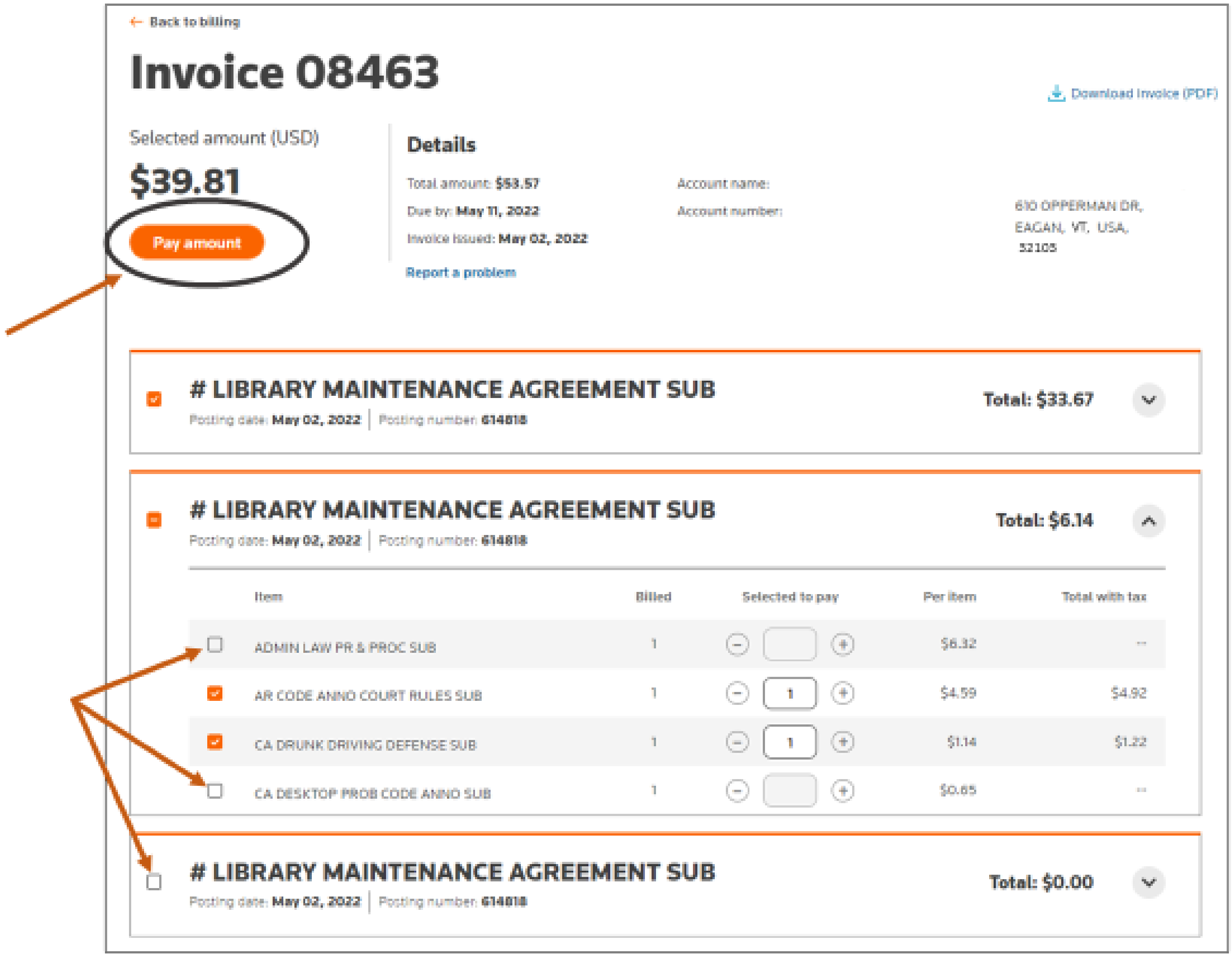
Next, check the boxes next to the items in the invoice you want to pay.



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



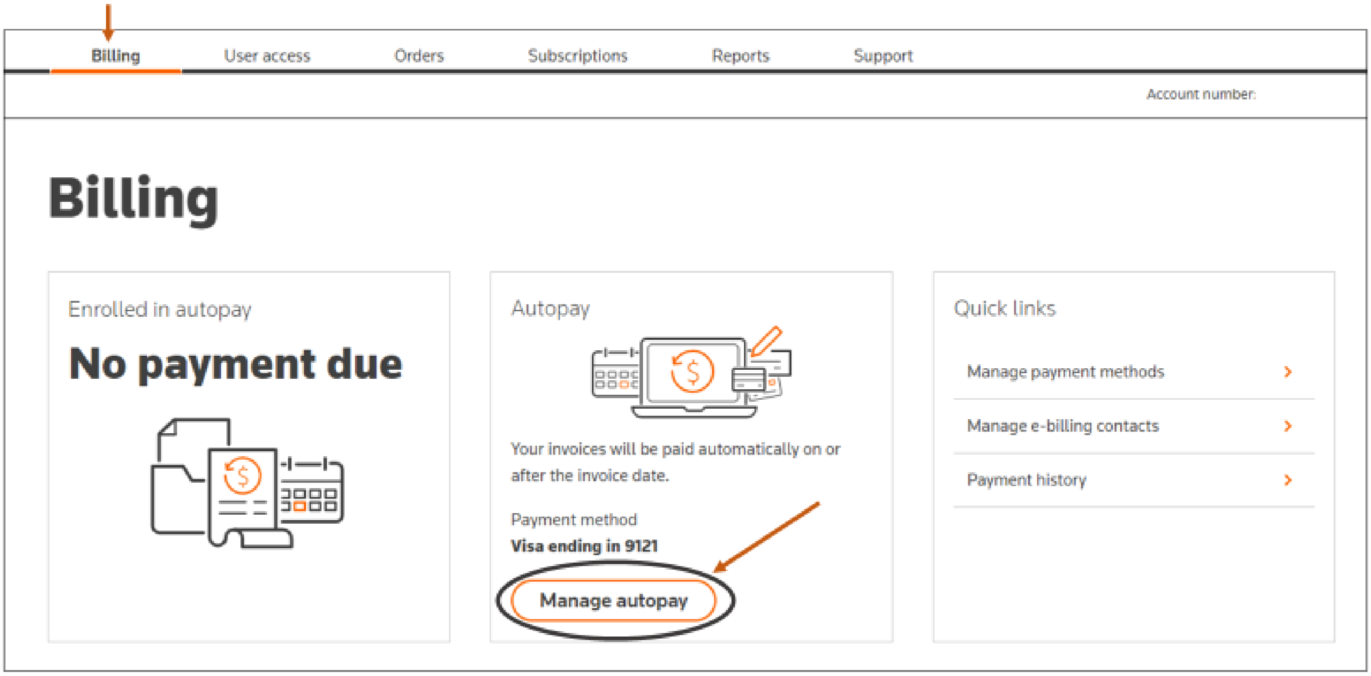
Next, uncheck the box next to any item you do not want to pay at this time. Then, click **Pay amount**.



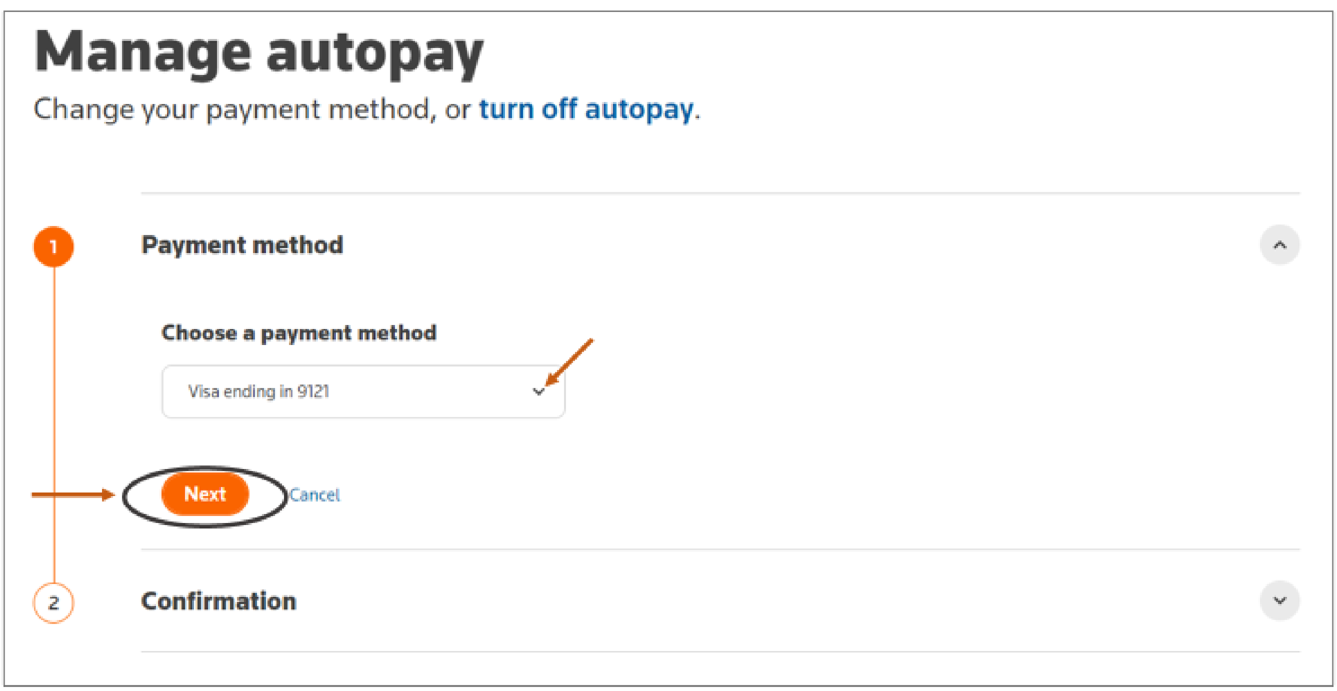
Next, follow the instructions to **Make a Payment** provided in this guide.

Manage Autopay

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

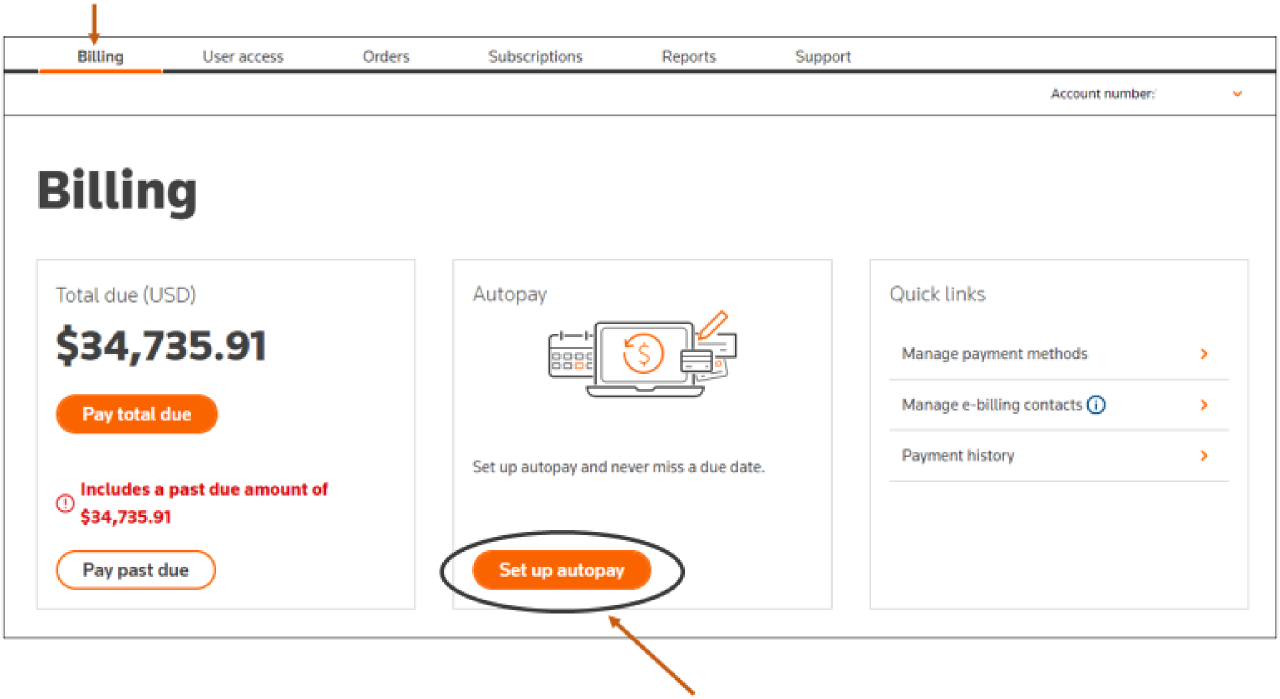


Next, choose a payment method and then click **Next**.

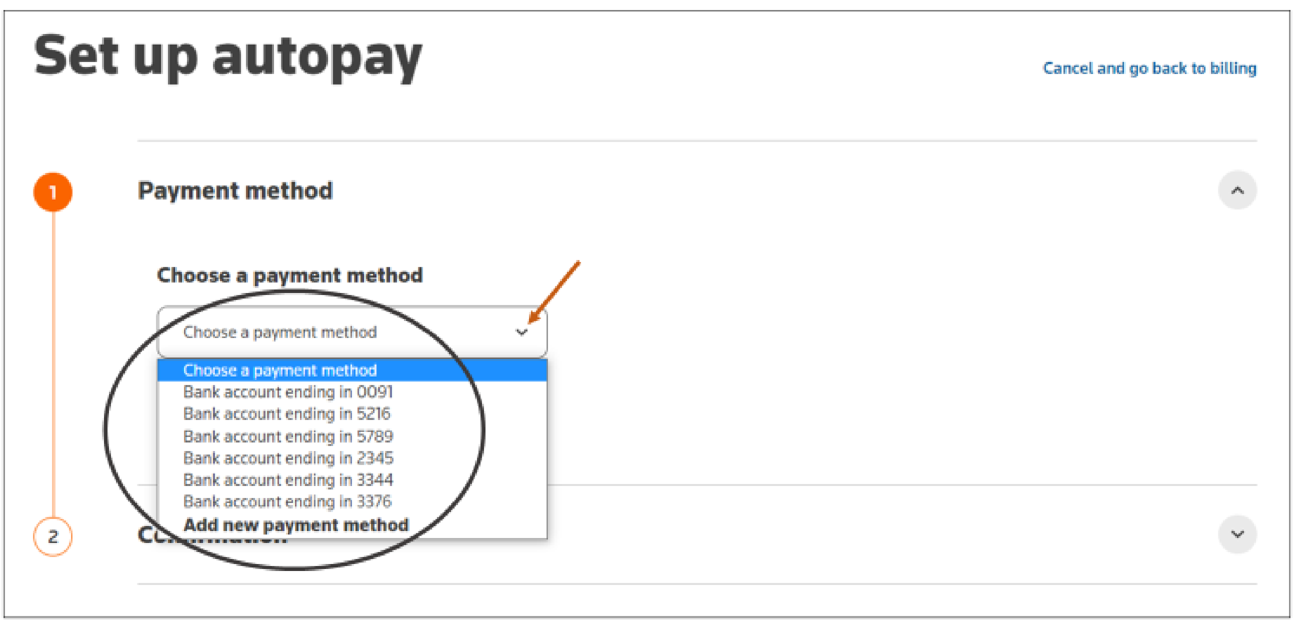


Set up Autopay

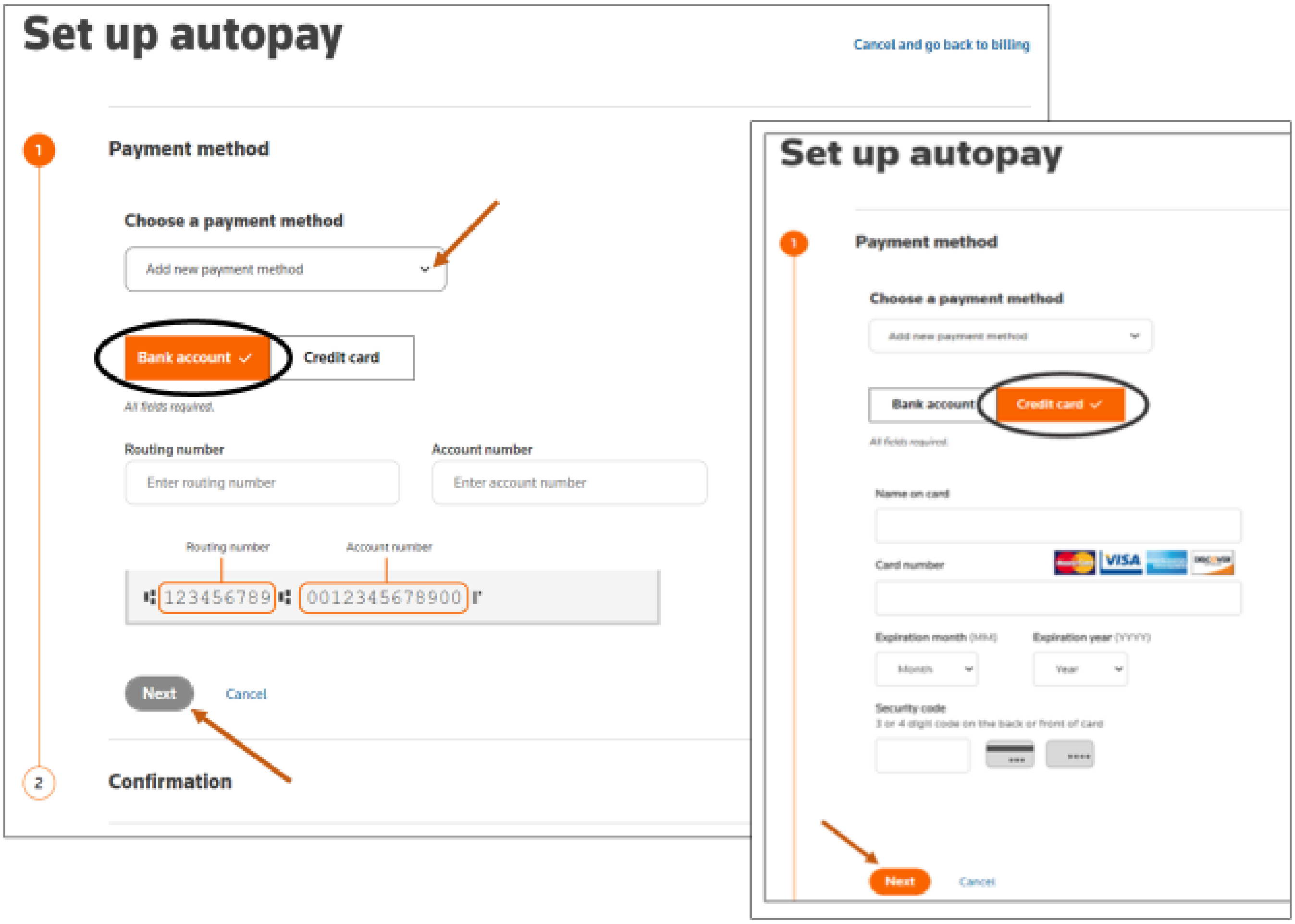
Navigate to the **Billing** tab and click **Set up autopay** from center box.



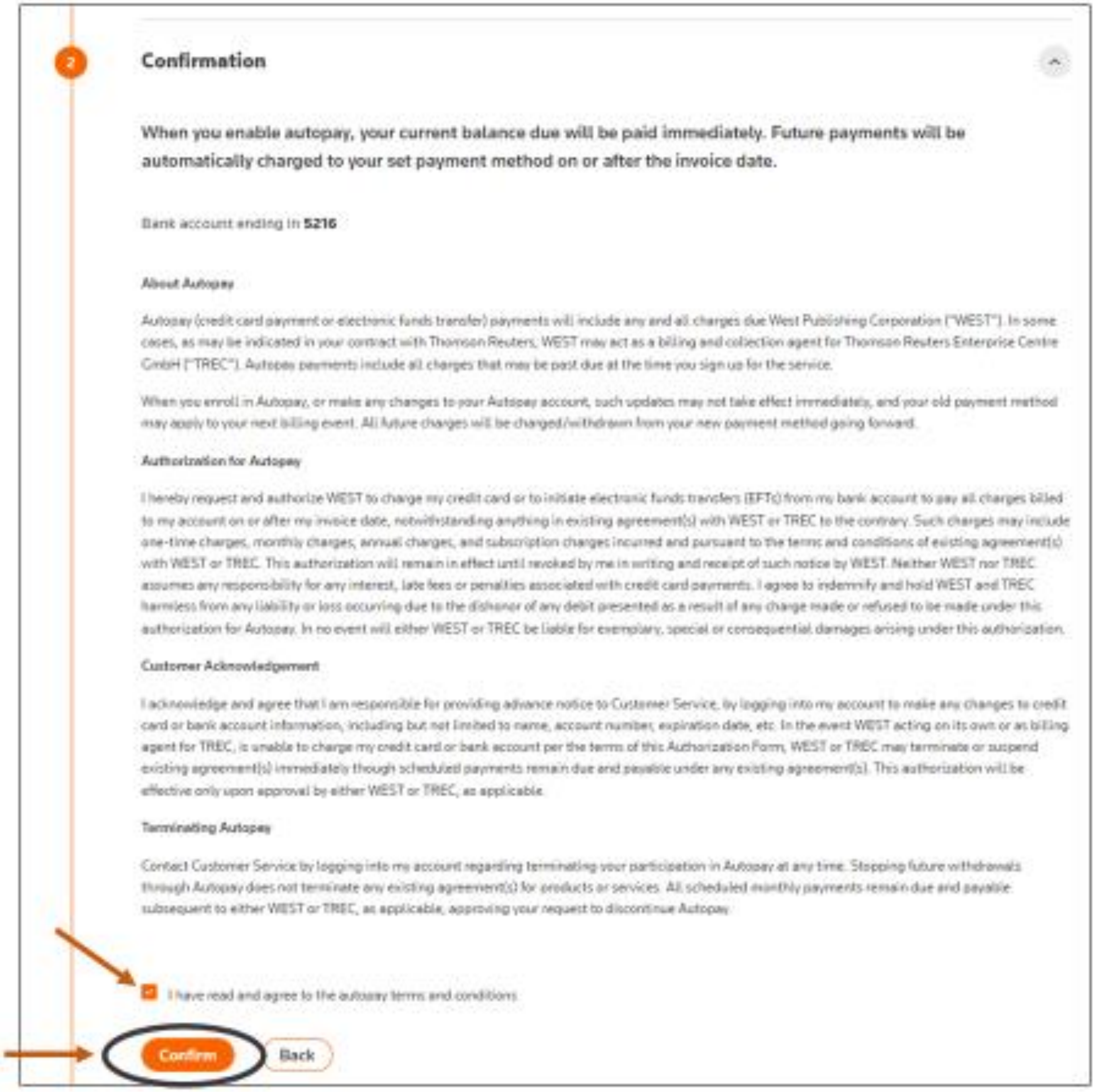
Then, click on the carrot next to Choose payment method and either select a saved payment method or add a new payment method.



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

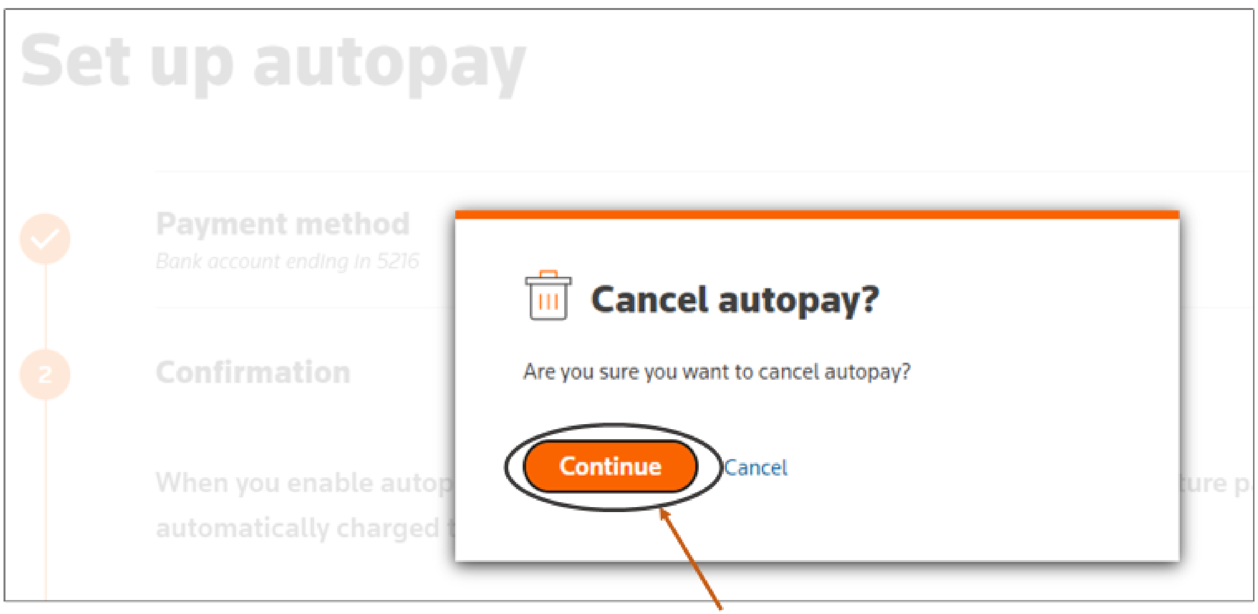


After choosing the payment method, click on the acknowledgment box. Then click **Confirm**.



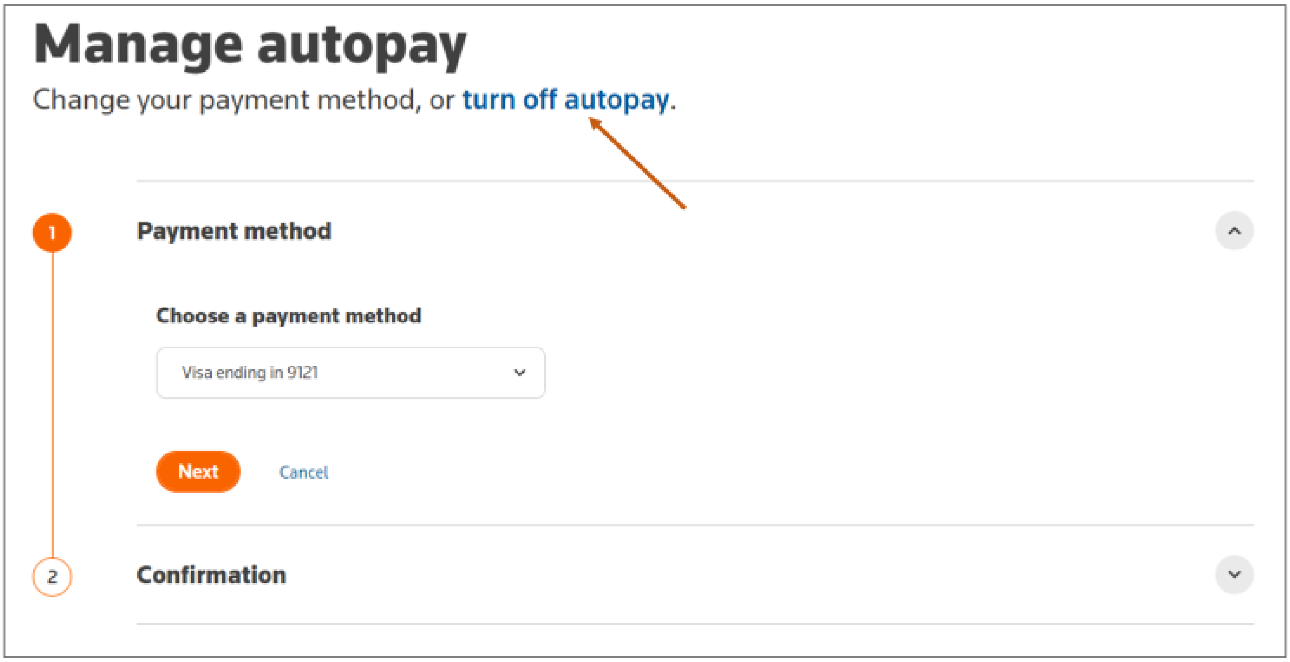
If you would like to cancel the autopay signup process, from the Setup autopay page, click **Cancel and go back to billing** on the top right side.

Next, click **Continue**.

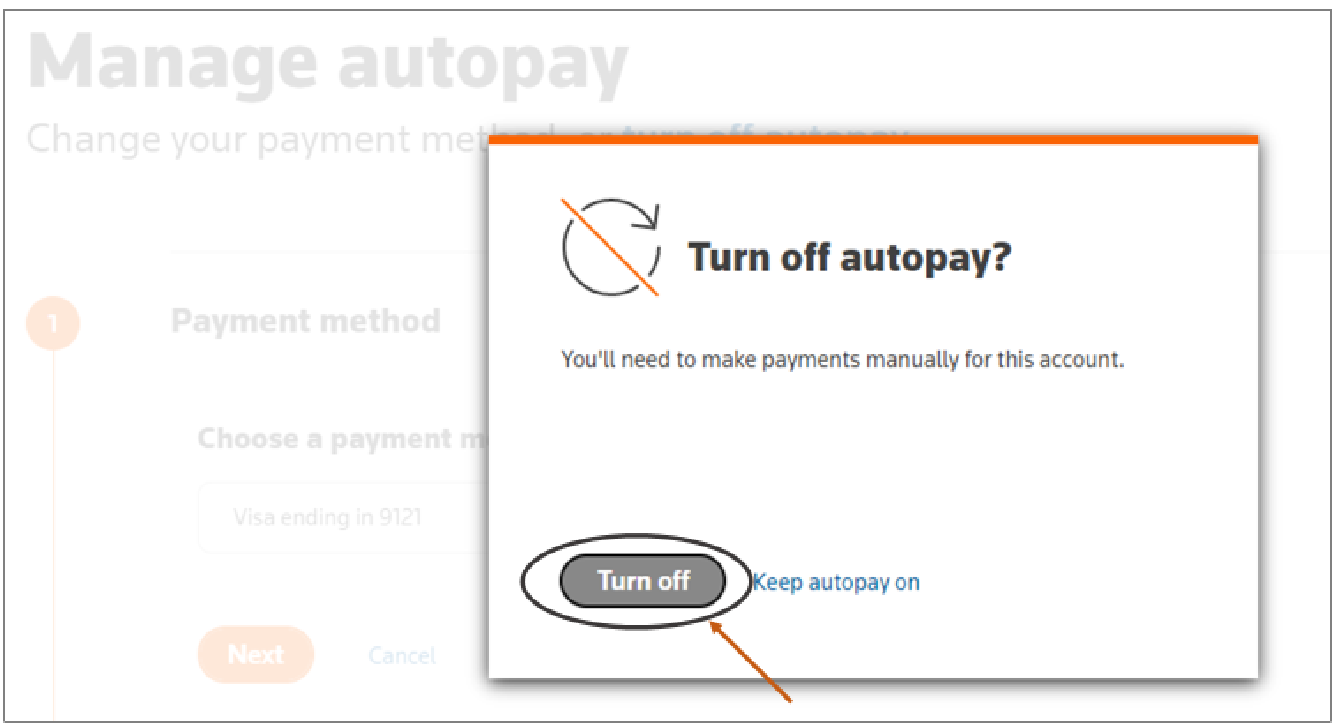


Turn Off Autopay

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

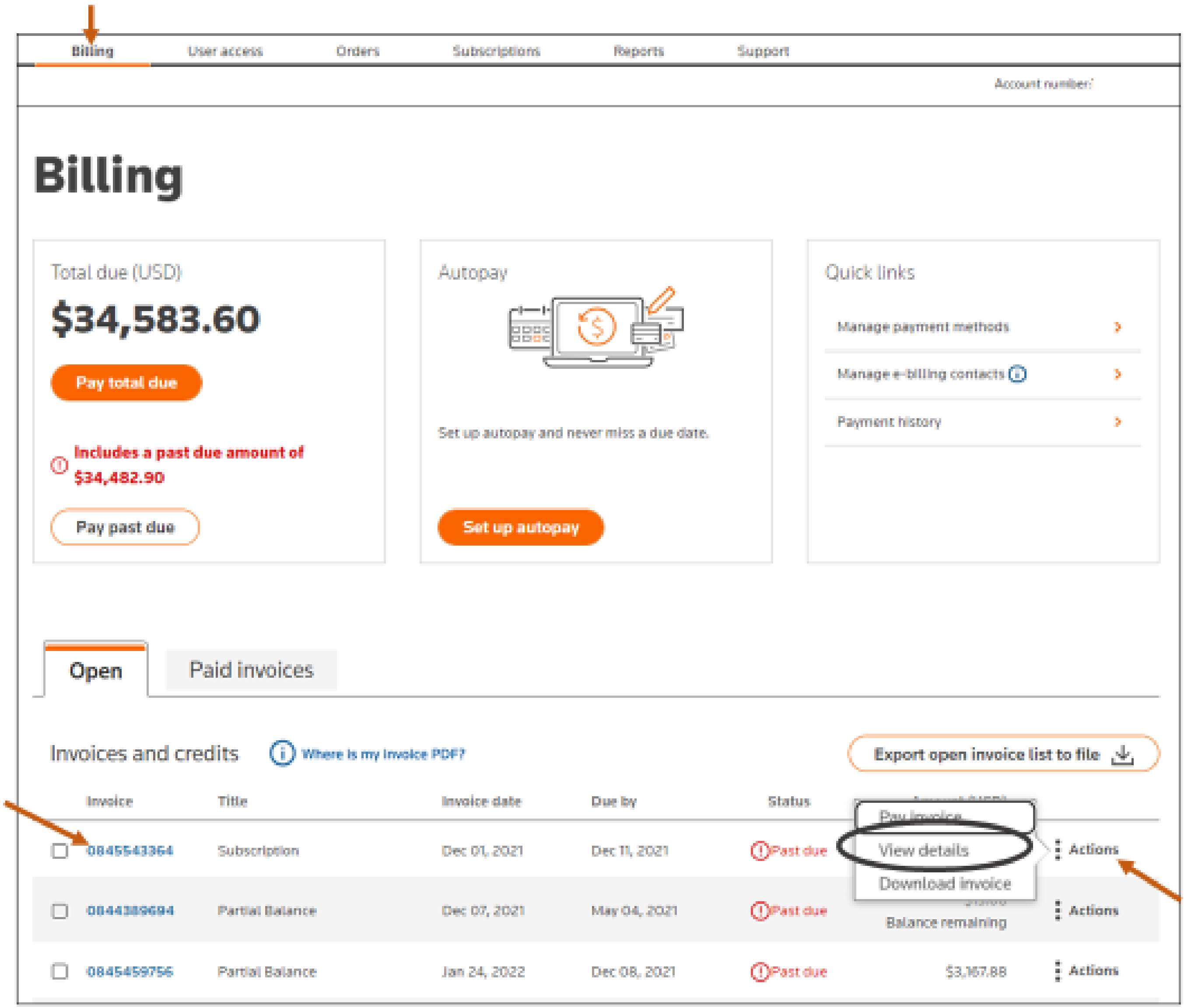


Then, click **Turn off**.

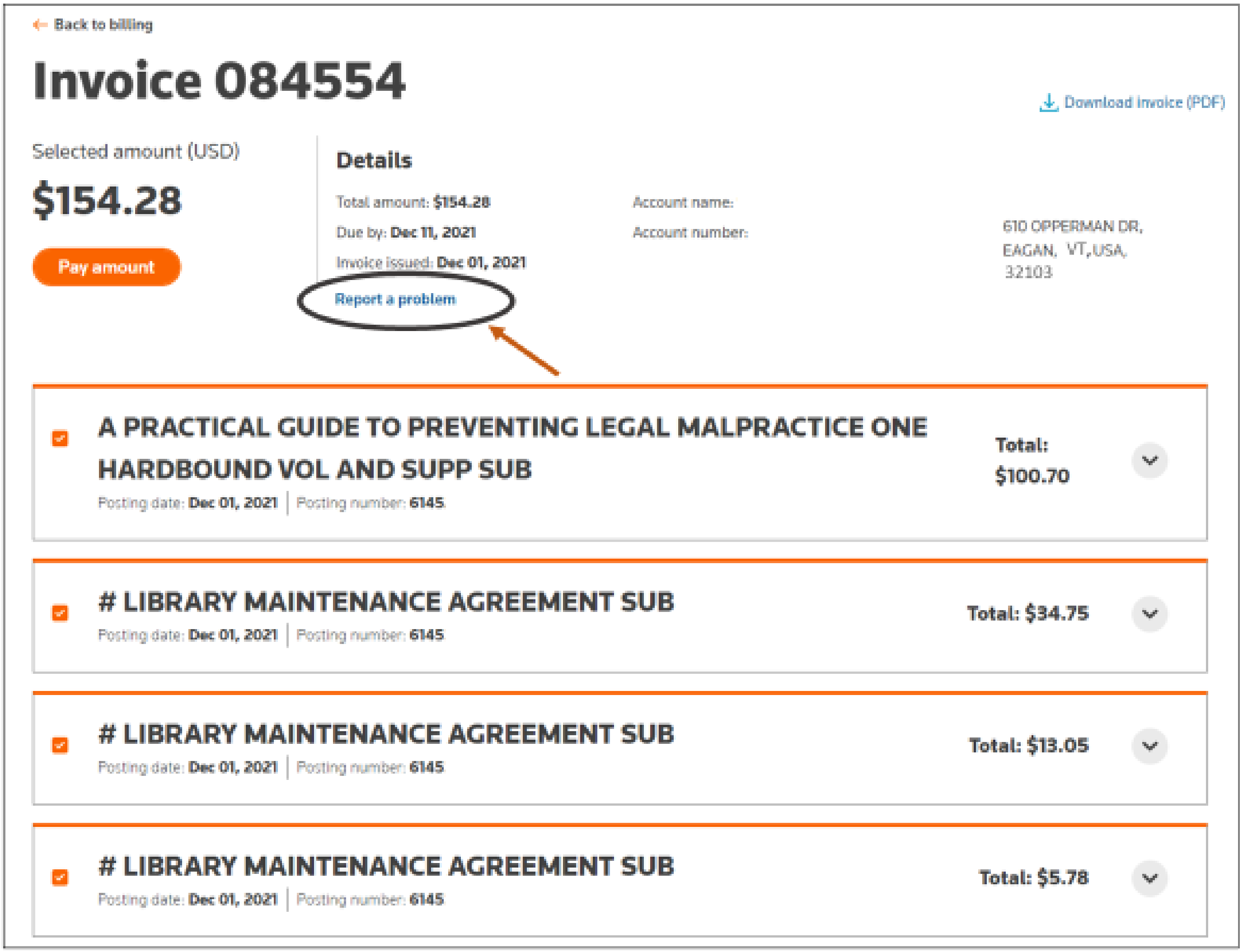


Dispute an Invoice

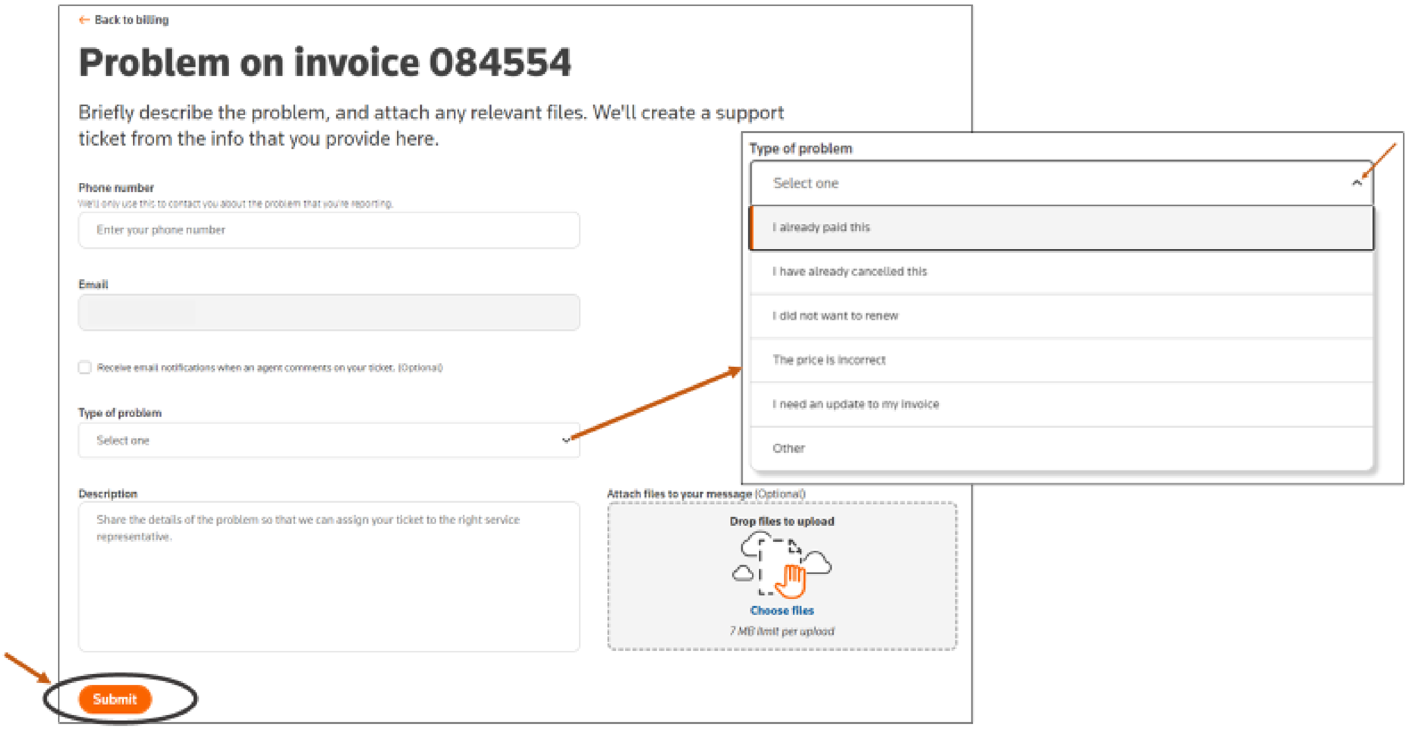
To dispute an invoice, navigate to the **Billing** tab, then either click the invoice number from the **Open** tab or click **Actions** and then select **View details**.



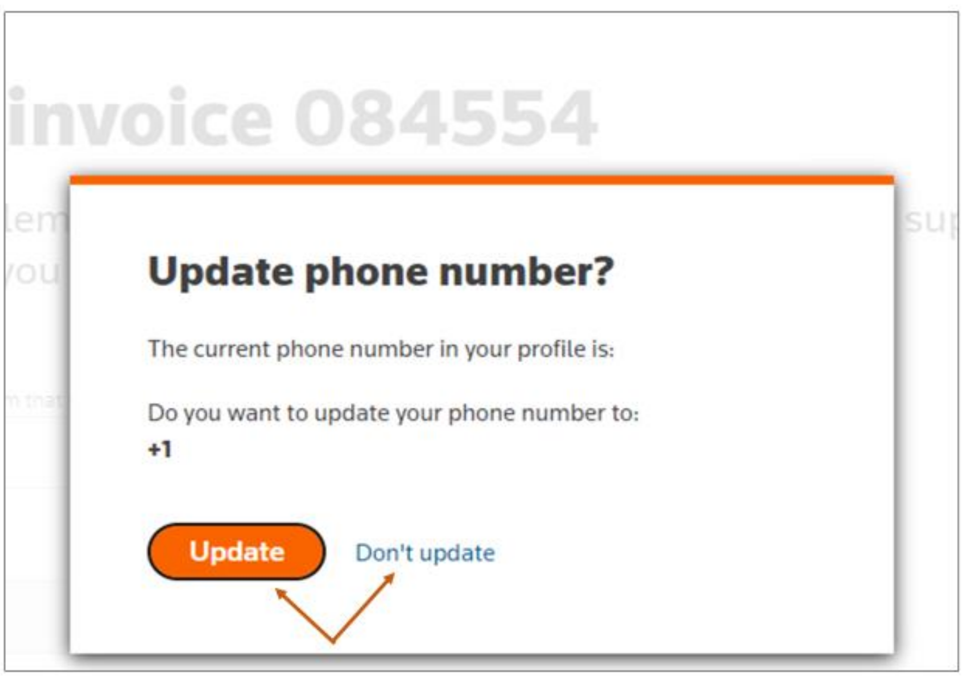
Next, click Report a problem.



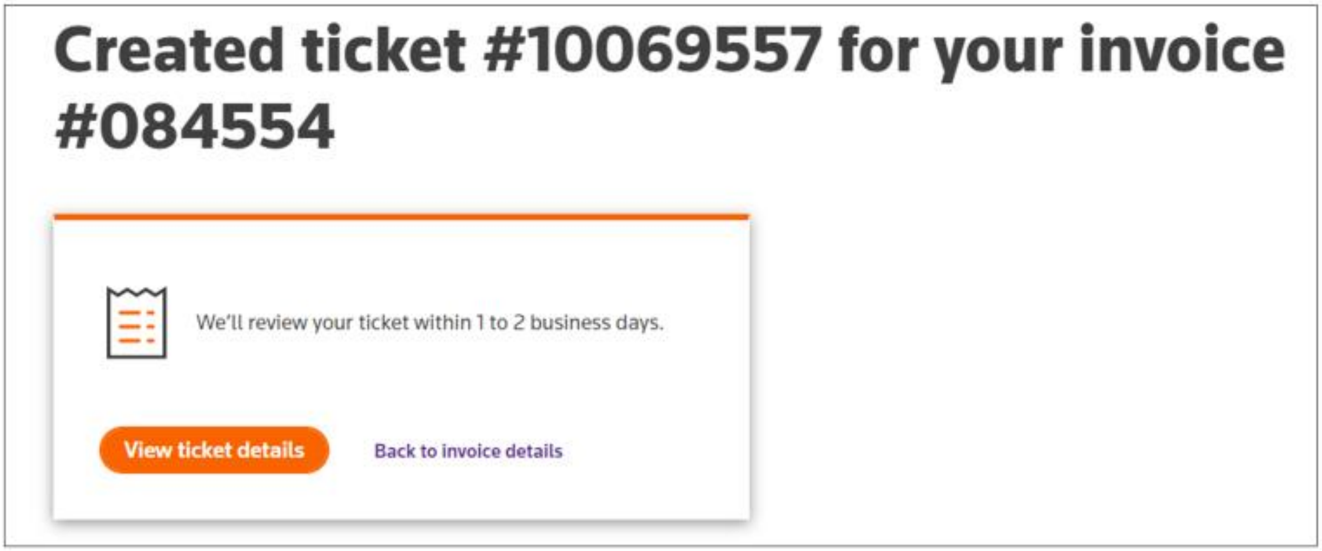
Complete the relevant information in the form. Note the following: 1) a phone number is required and must include the country code (i.e., +1 for US), and just numbers, 2) your email address is prepopulated and cannot be changed here, and 3) for **Type of problem**, click the carrot and select the most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



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

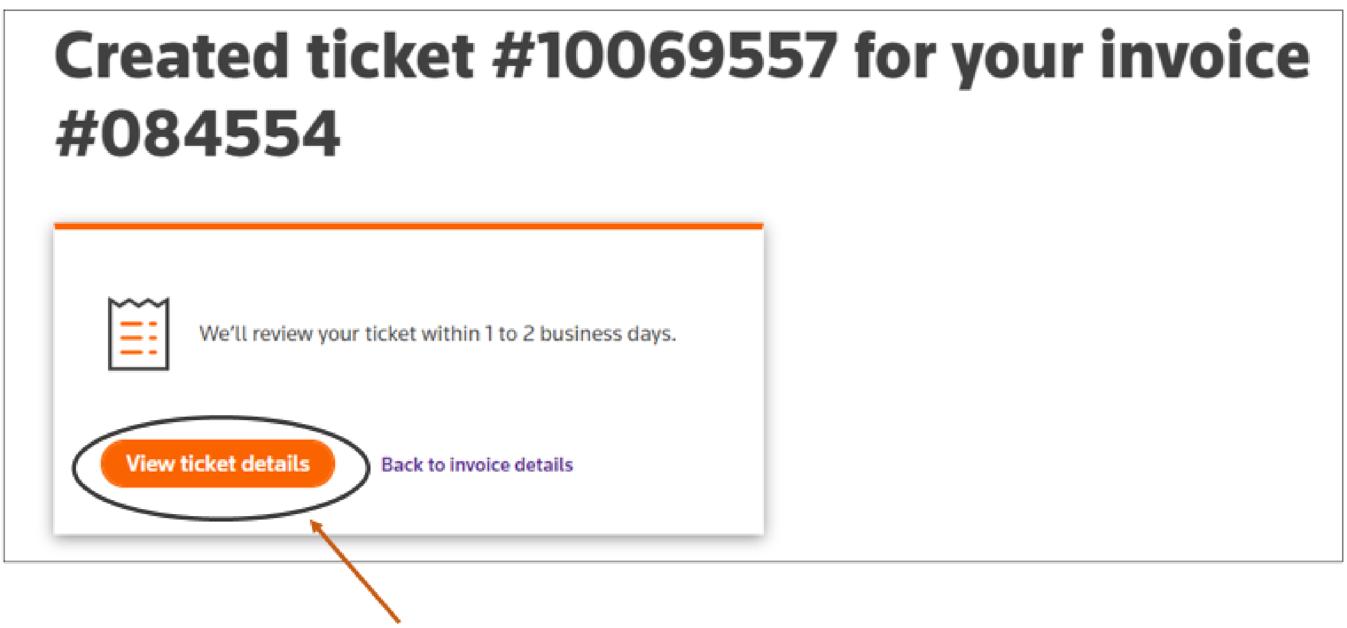


Next, you will see a confirmation box acknowledging that your ticket was submitted.

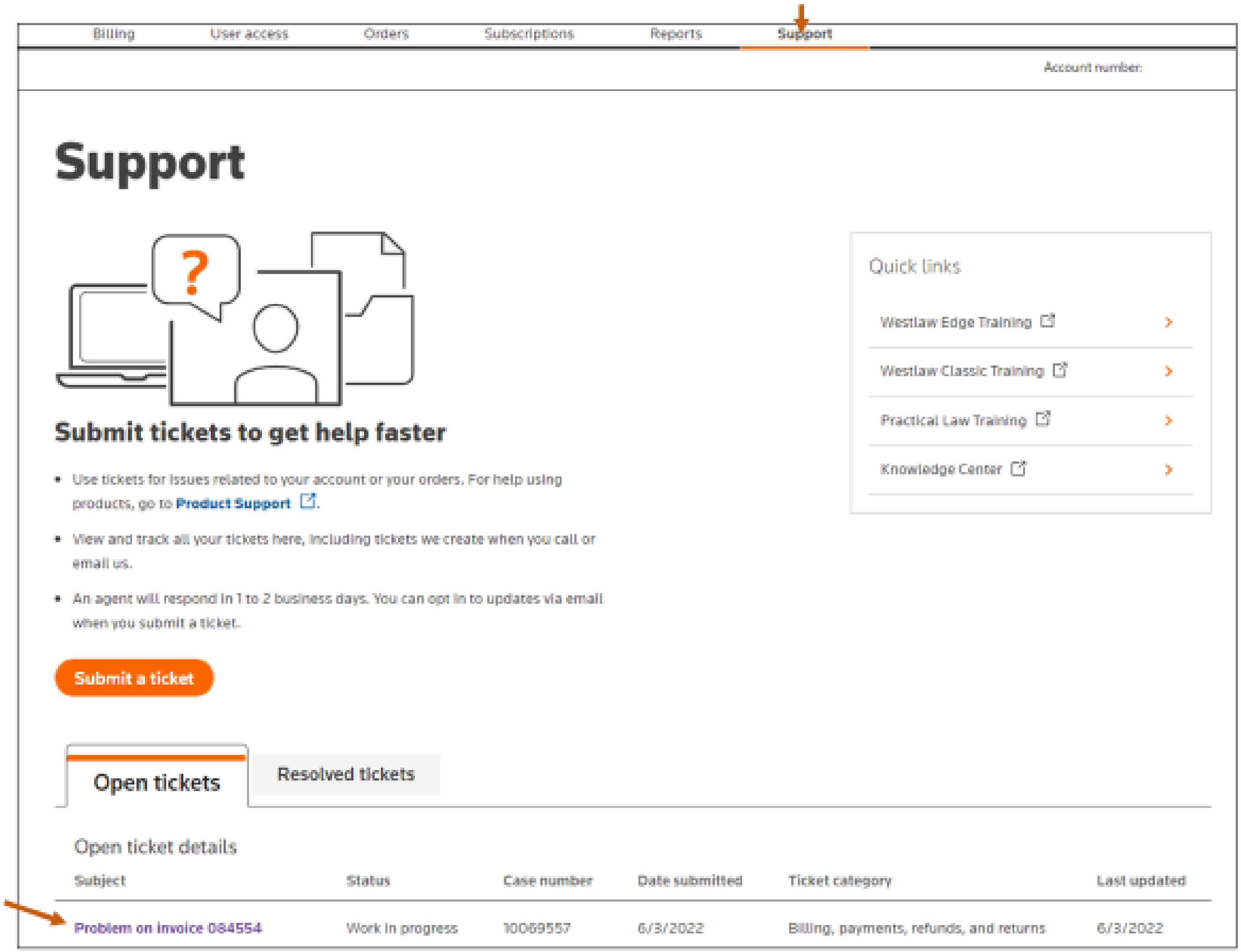


Once you create an invoice ticket, there are two ways to view it.

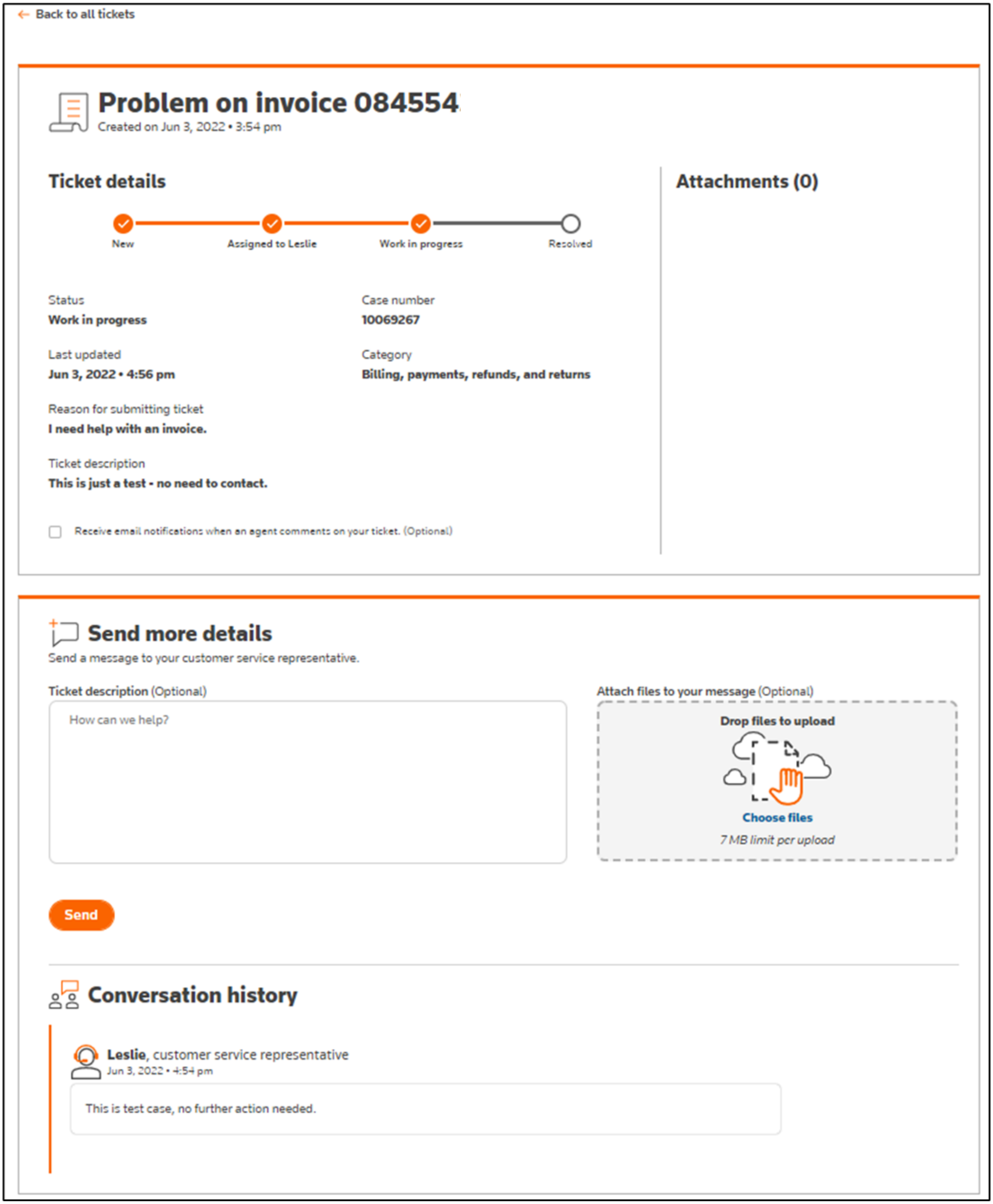
1) View invoice ticket details by clicking on the View ticket details button in the Created ticket popup box after reporting a problem.



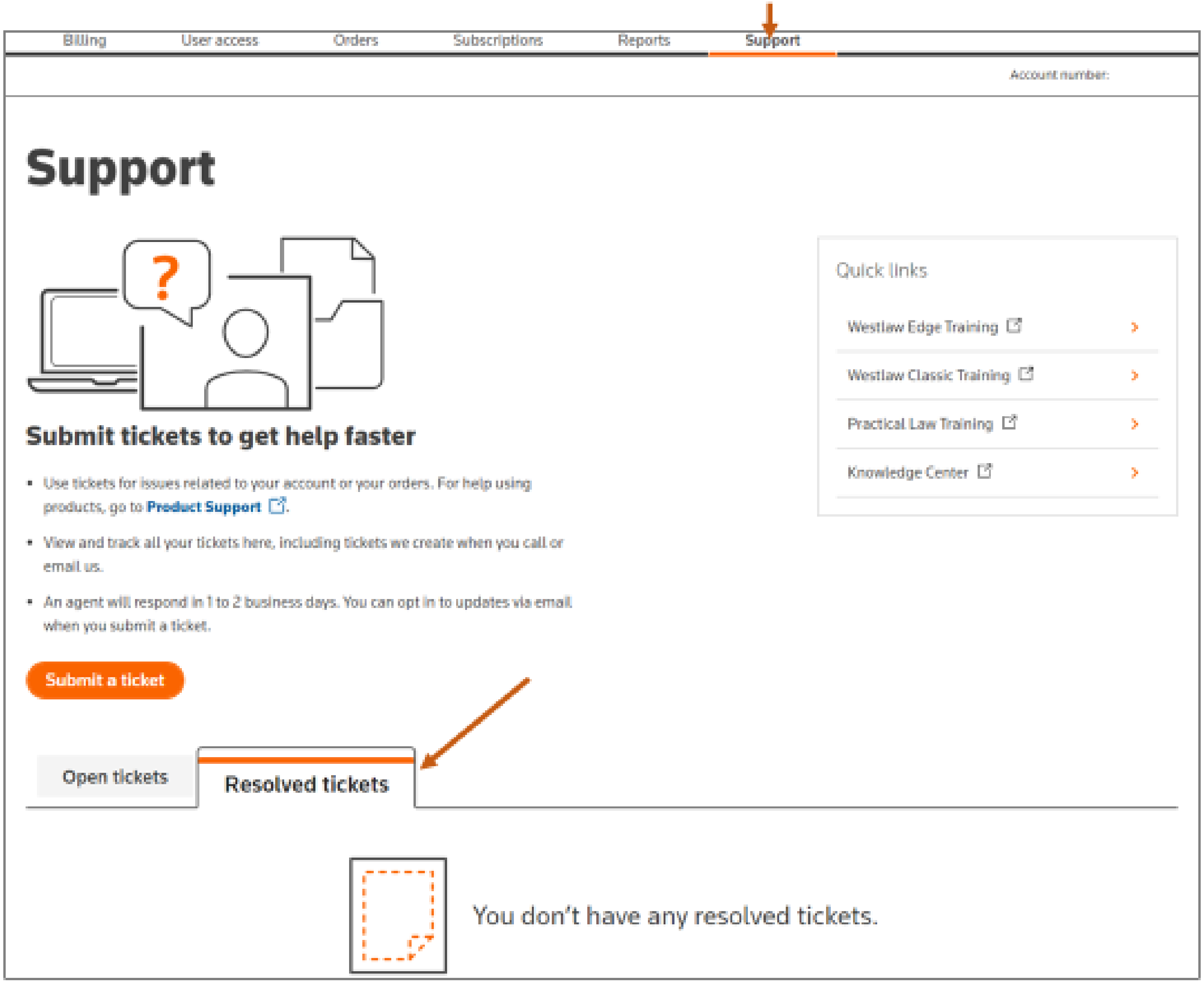
2) Navigate to the **Support** tab. Next, click on the ticket you want to view from the **Open tickets** tab.



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

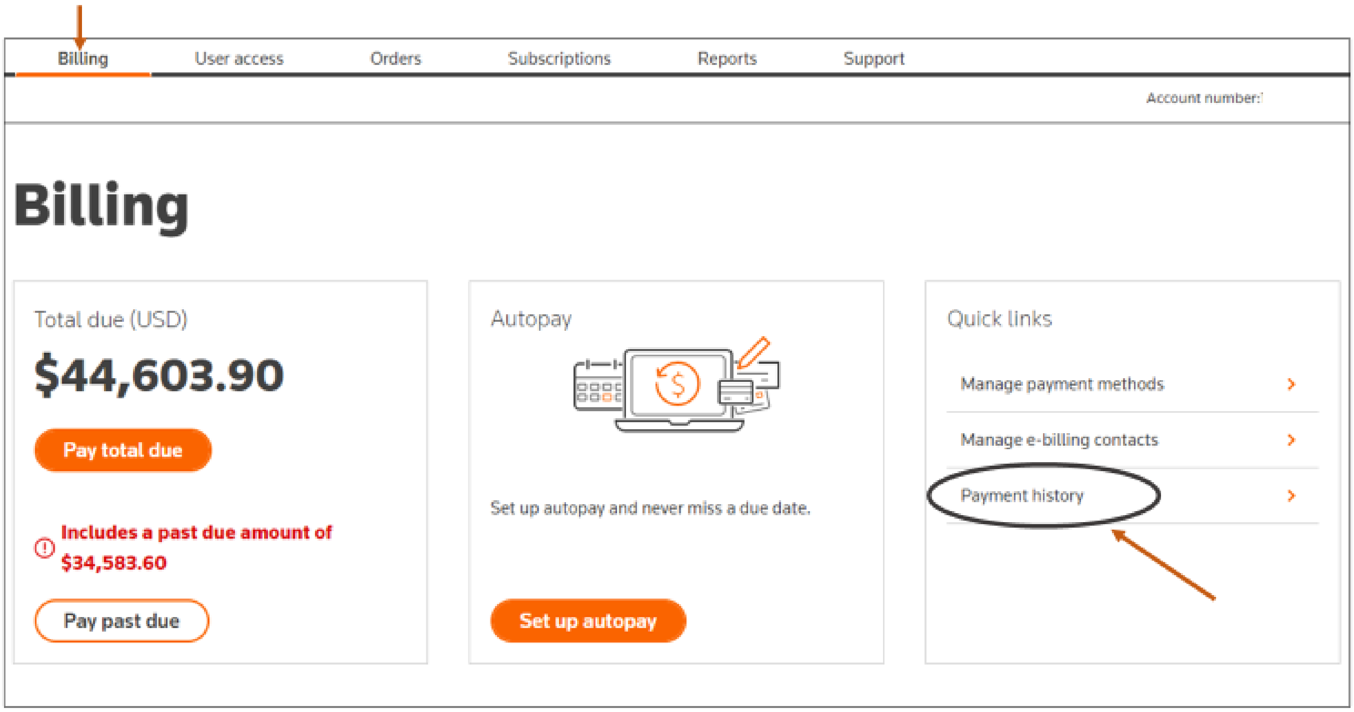

Back to all tickets
Problem on invoice 084554
Created on Jun 3, 2022 • 3:54 pm
Ticket details
New
Assigned to Leslie
Work in progress
Resolved
Status
Work in progress
Case number
10069267
Last updated
Jun 3, 2022 • 4:56 pm
Category
Billing, payments, refunds, and returns
Reason for submitting ticket
I need help with an invoice.
Ticket description
This is just a test - no need to contact.
Receive email notifications when an agent comments on your ticket. (Optional)
Attachments (0)
Send more details
Send a message to your customer service representative.
Ticket description (Optional)
How can we help?
Attach files to your message (Optional)
Drop files to upload
Choose files
7 MB limit per upload
Send
Conversation history
Leslie, customer service representative
Jun 3, 2022 • 4:54 pm
This is test case, no further action needed.

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



View Payment History

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



A sample Payment history appears below.

← Back to billing

Payment history

Payments made in the last 13 months are displayed below.

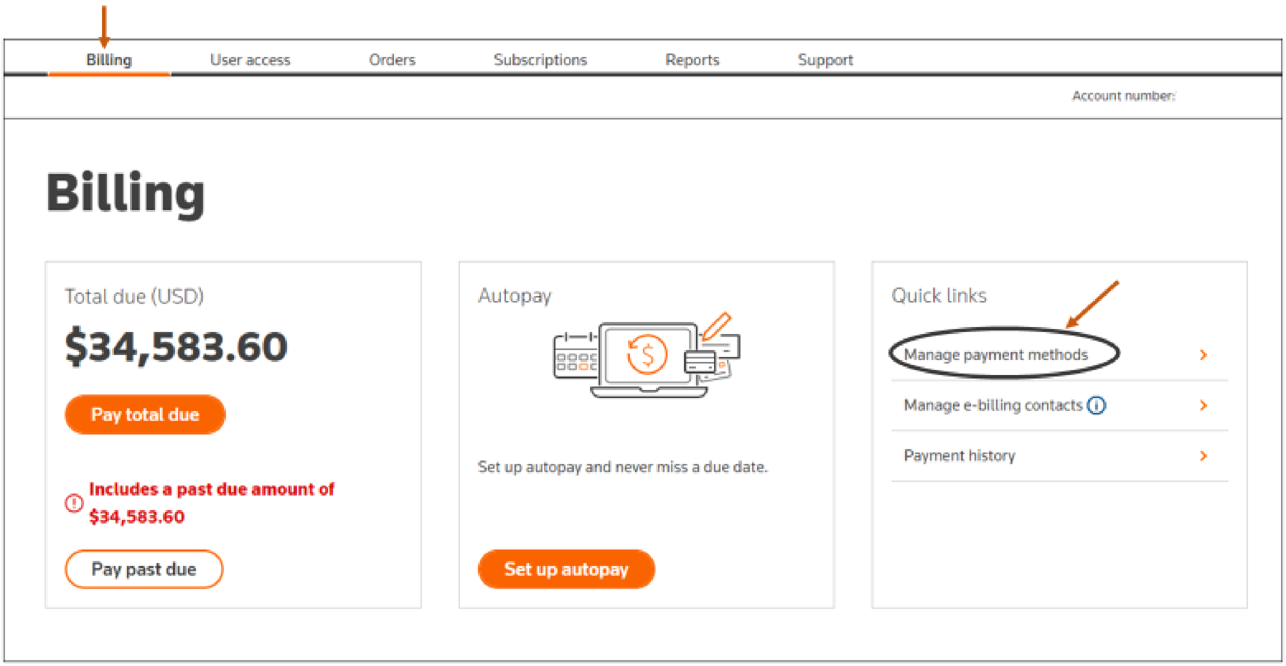
Payment history for 10043

Export payment history to file

Payment date	Invoice number	Payment method	Amount (USD)
May 20, 2022	0844876642	Bank account XXXXXXX0137	$154.28
Apr 11, 2022	0844389694	Visa ending in 5861	$5.78 *Partial payment
Mar 28, 2022	0845728929	Bank account XXXXXXX0137	$154.28
Mar 27, 2022	0844389694	Visa ending in 8432	$32.12 *Partial payment
Dec 07, 2021	AUTO WRITE-OFF	CREDIT	$0.01 *Partial payment
Oct 07, 2021	0844389694	Visa ending in 3298	$13.06 *Partial payment
Oct 07, 2021	0845043024	Visa ending in 3298	$13.05 *Partial payment
Sep 12, 2021	0844389694	Visa ending in 8432	$5.78 *Partial payment
Sep 12, 2021	0844716448	Visa ending in 8432	$13.05 *Partial payment

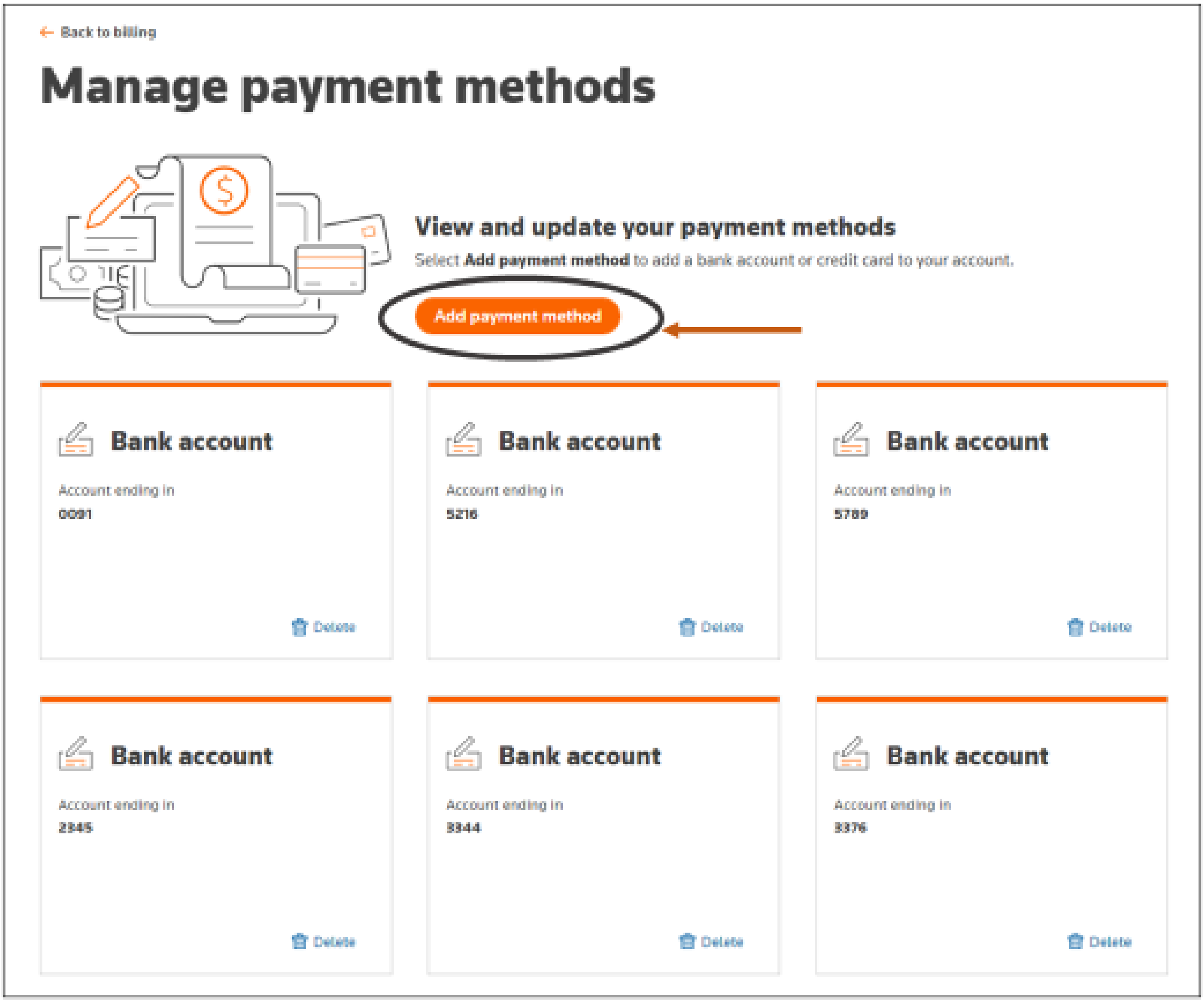
Manage Payment Methods

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

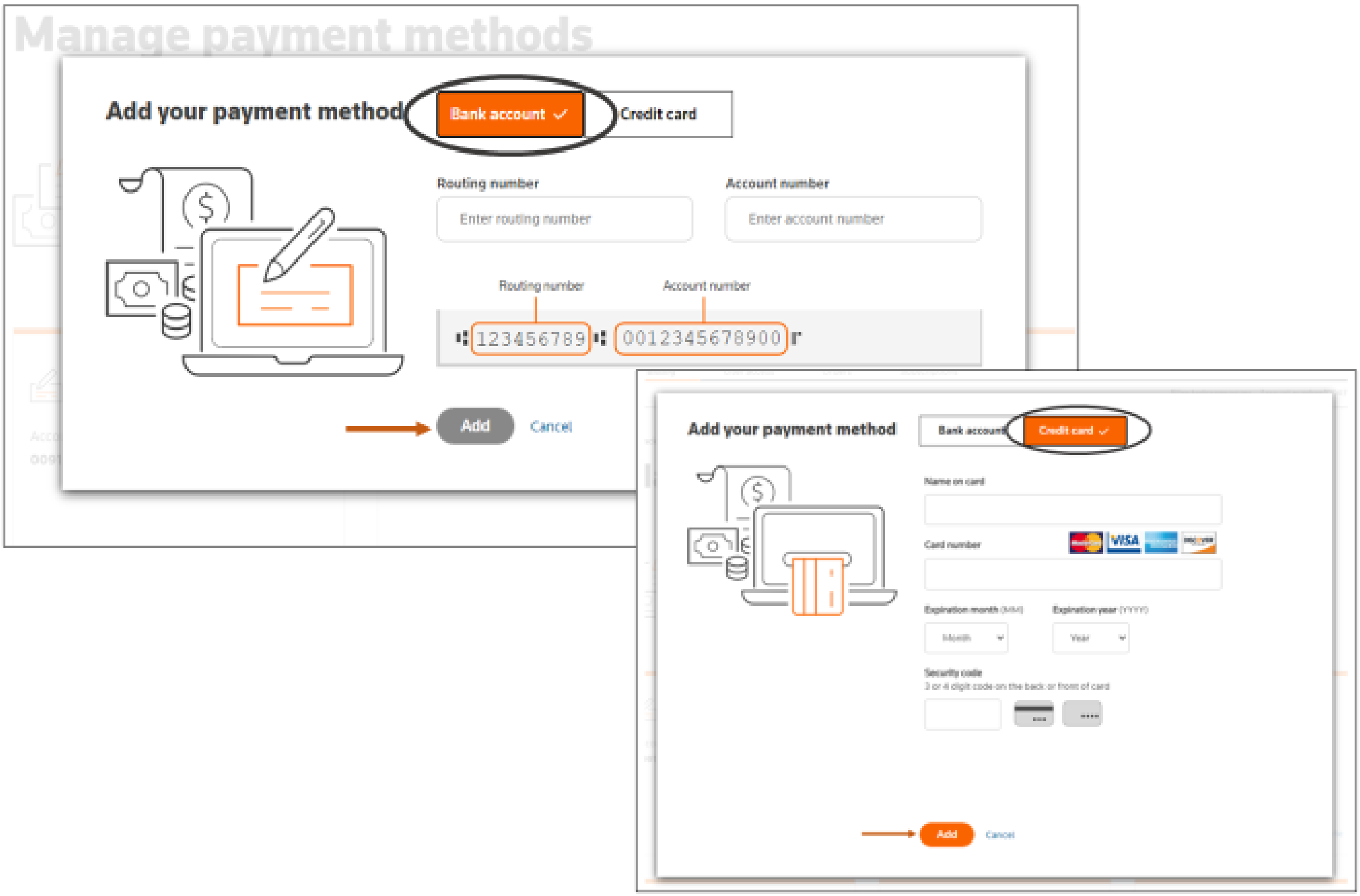


Add a Payment Method

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

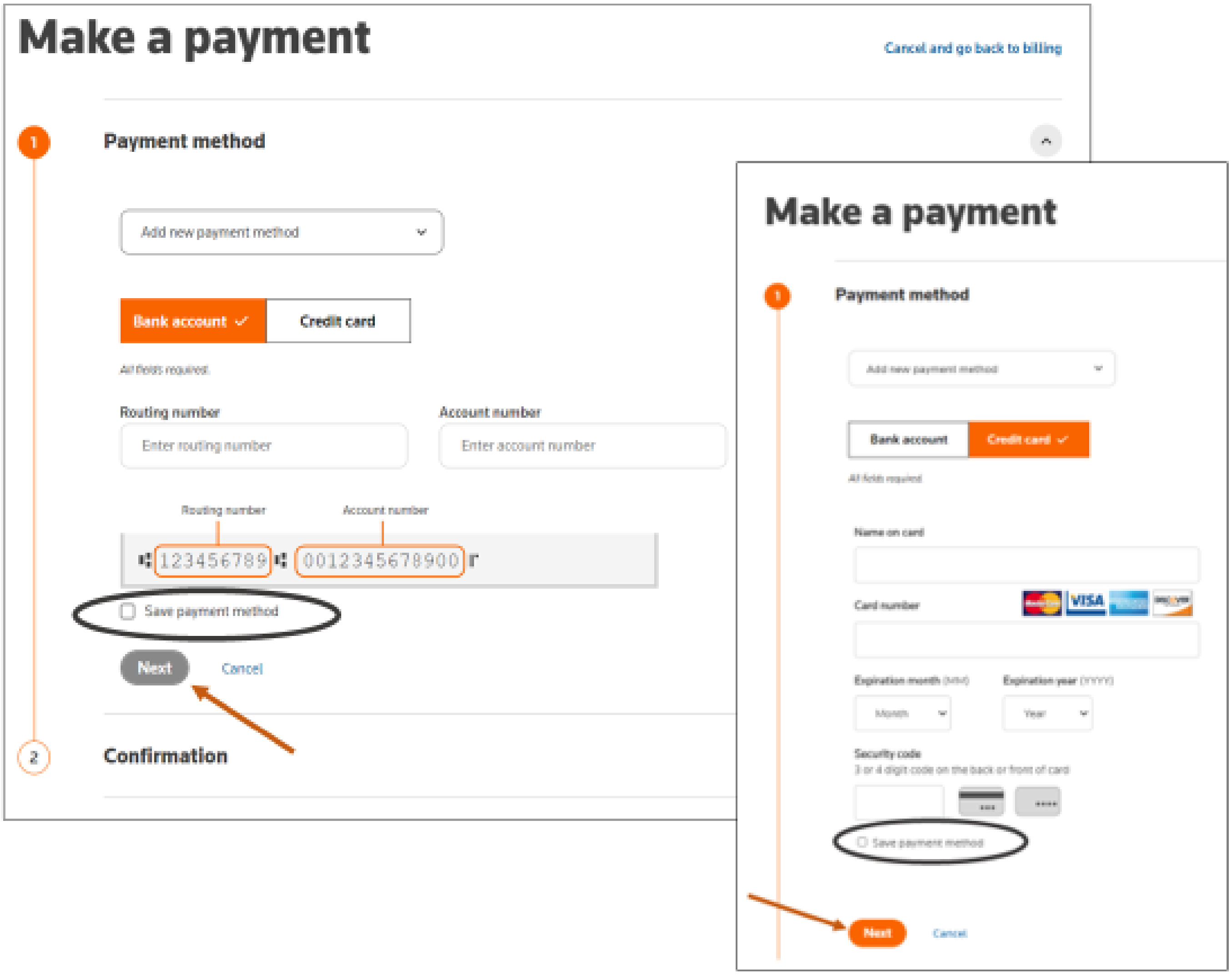


Add your payment method page, select either Bank account or Credit card. Then, input the required information. Next, click **Add**.



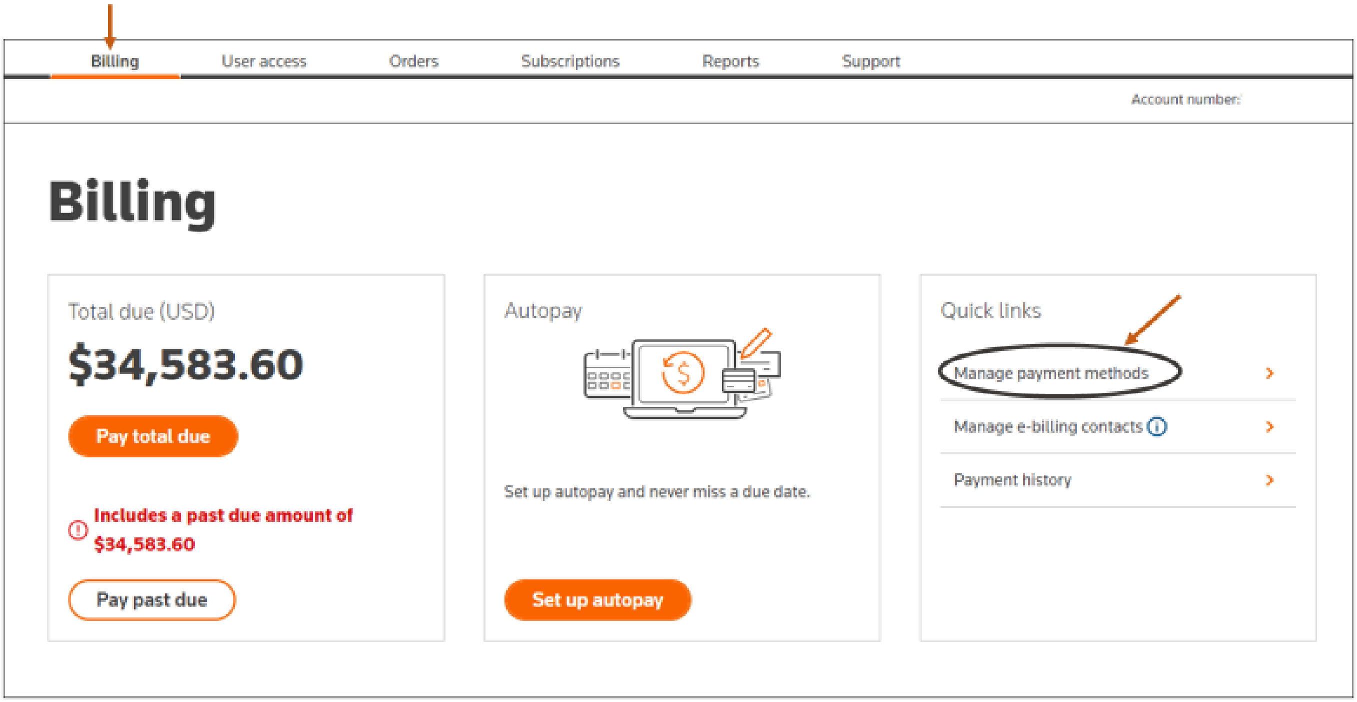
Save a Payment Method

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

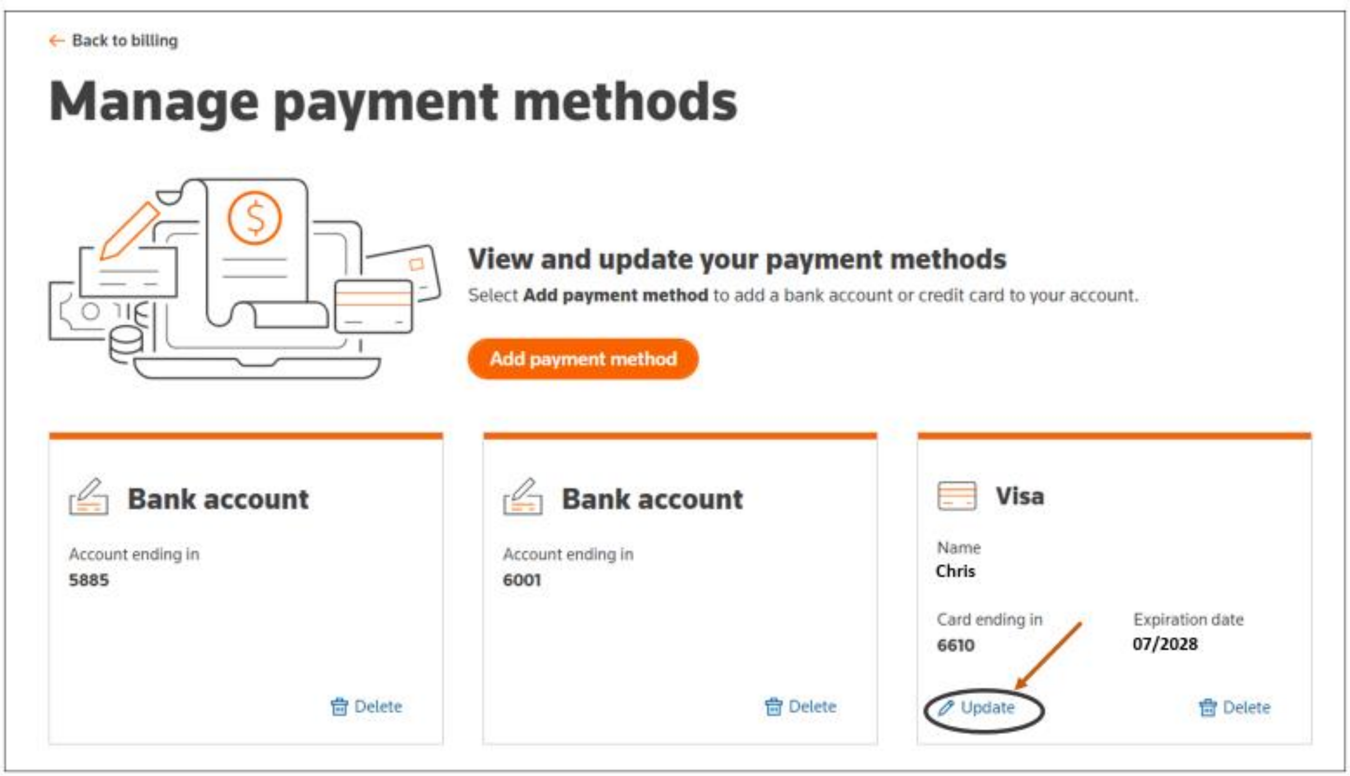


Edit a Payment Method

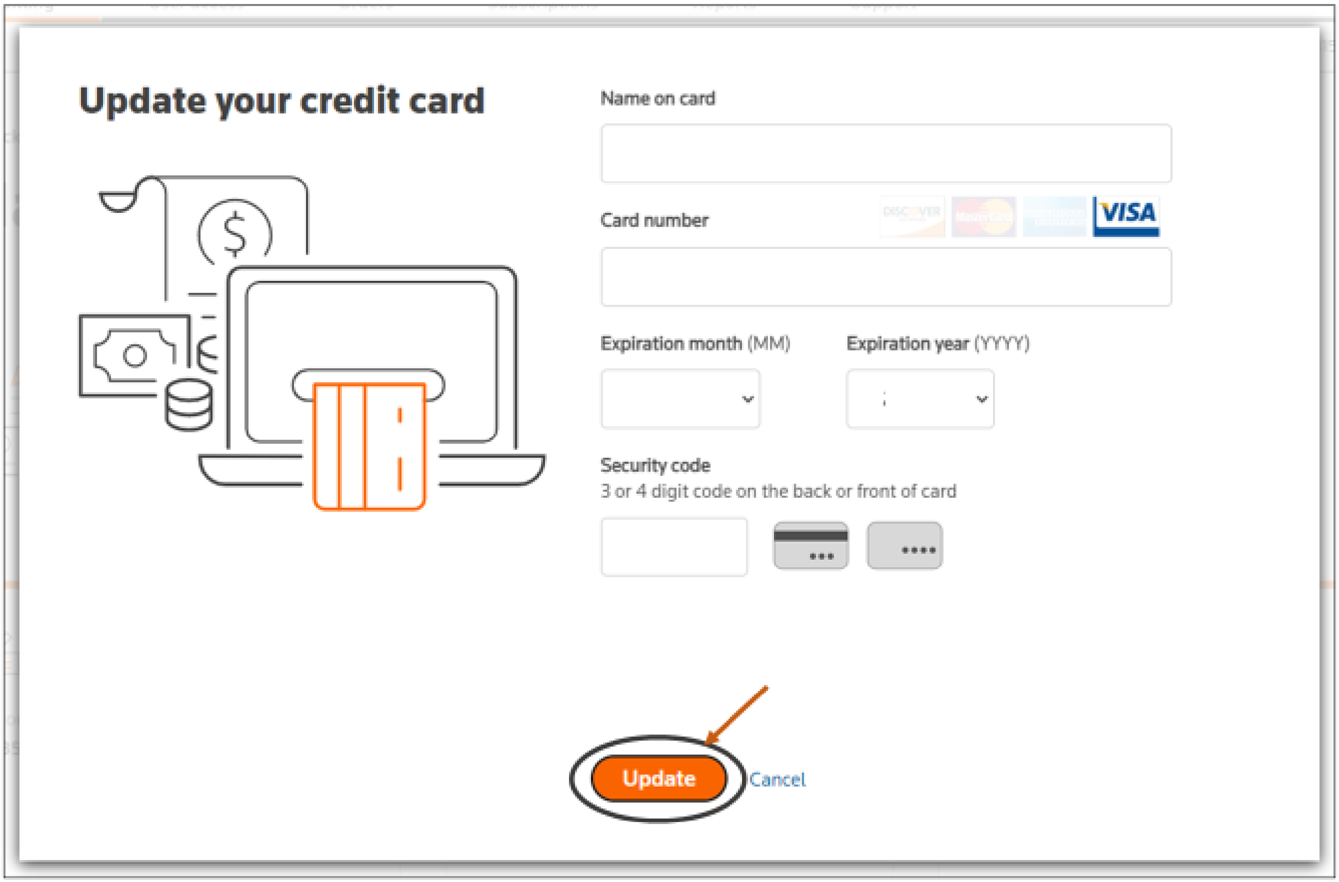
Navigate to the **Billing** tab and click **Manage payment methods** from the Quick links box on the right side.



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

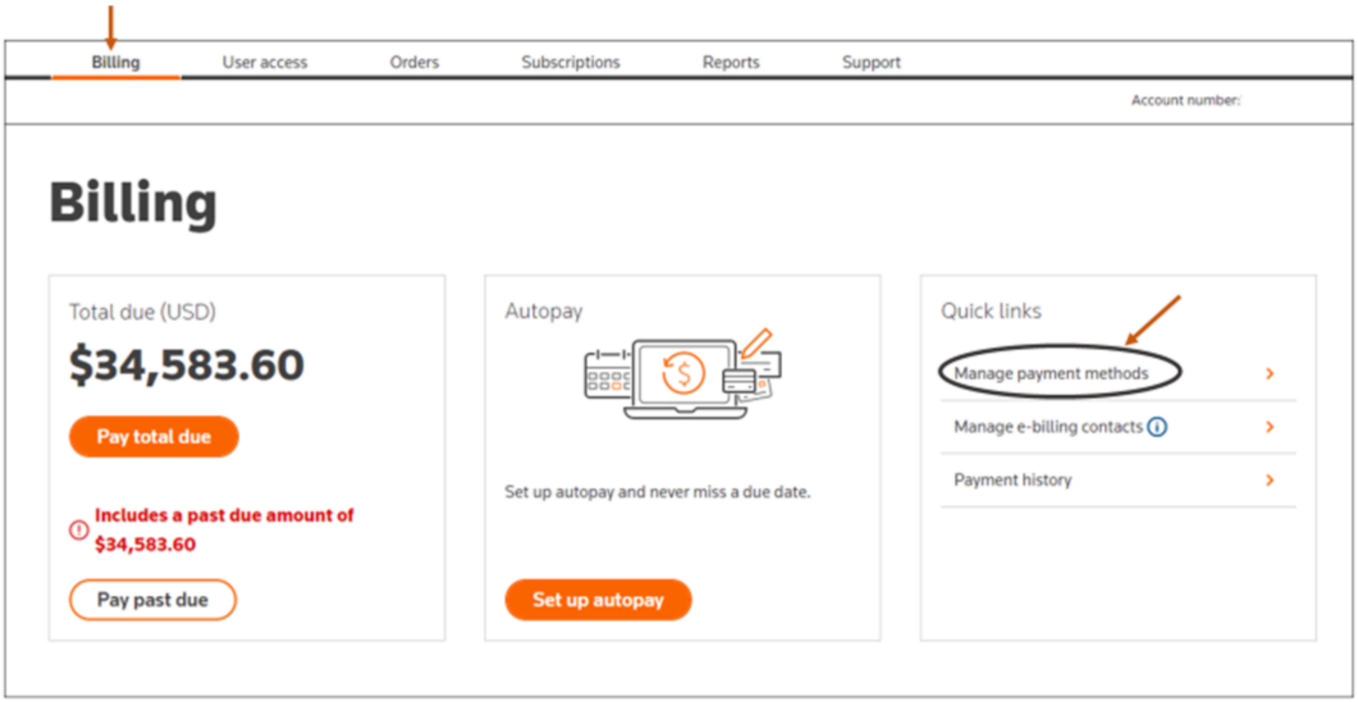


Then, enter any necessary changes and click **Update.**

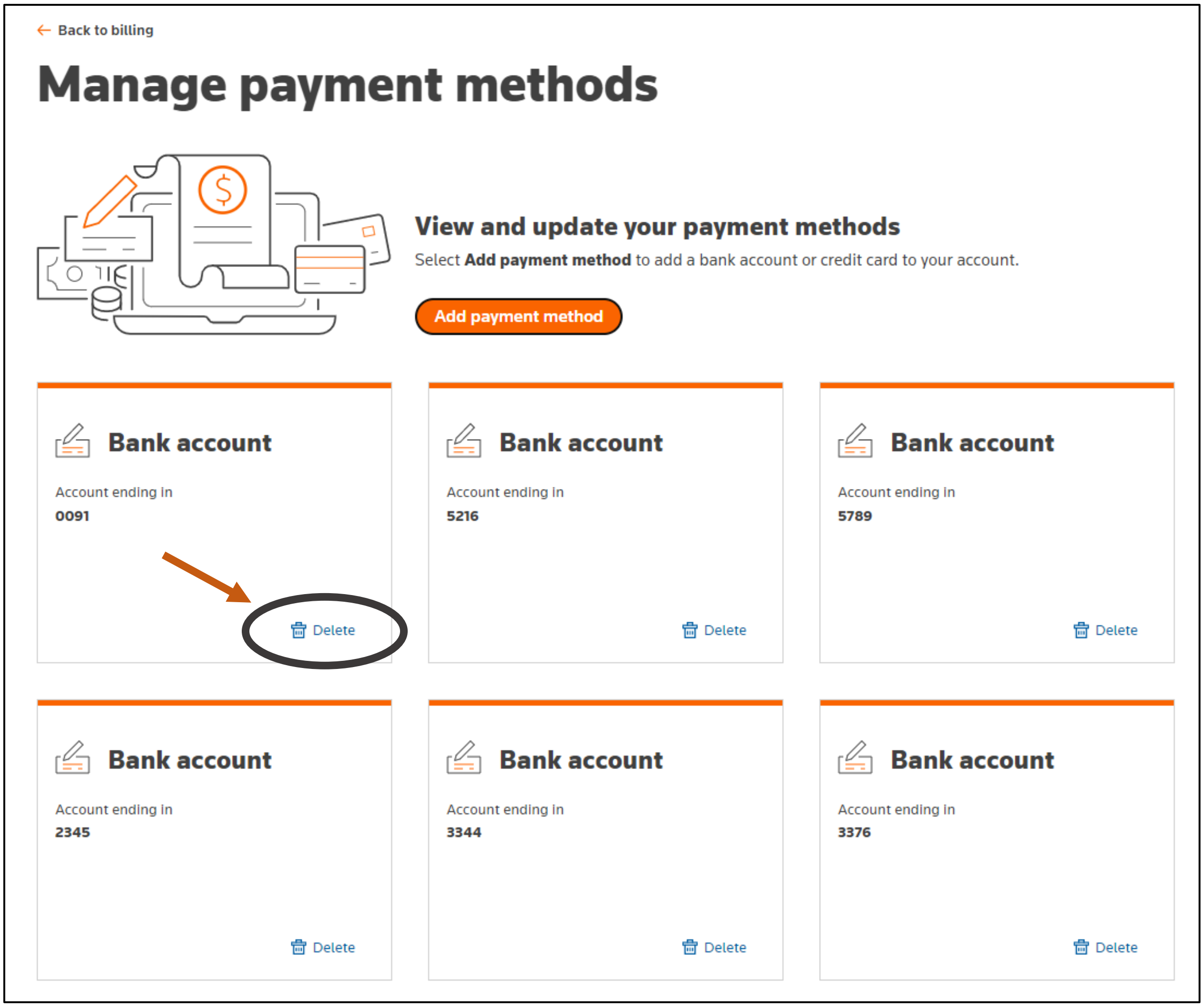


Delete a Payment Method

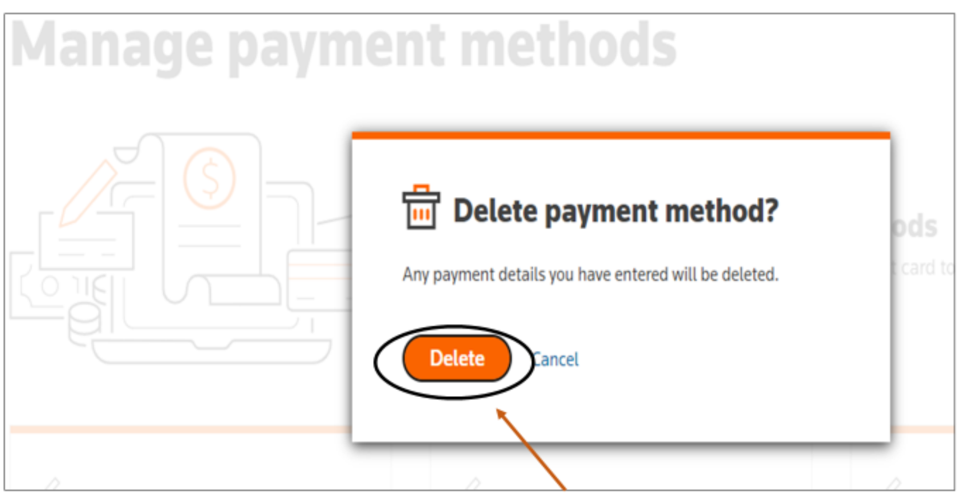
Navigate to the **Billing tab** and click **Manage payment methods** from the Quick links box on the right side.



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

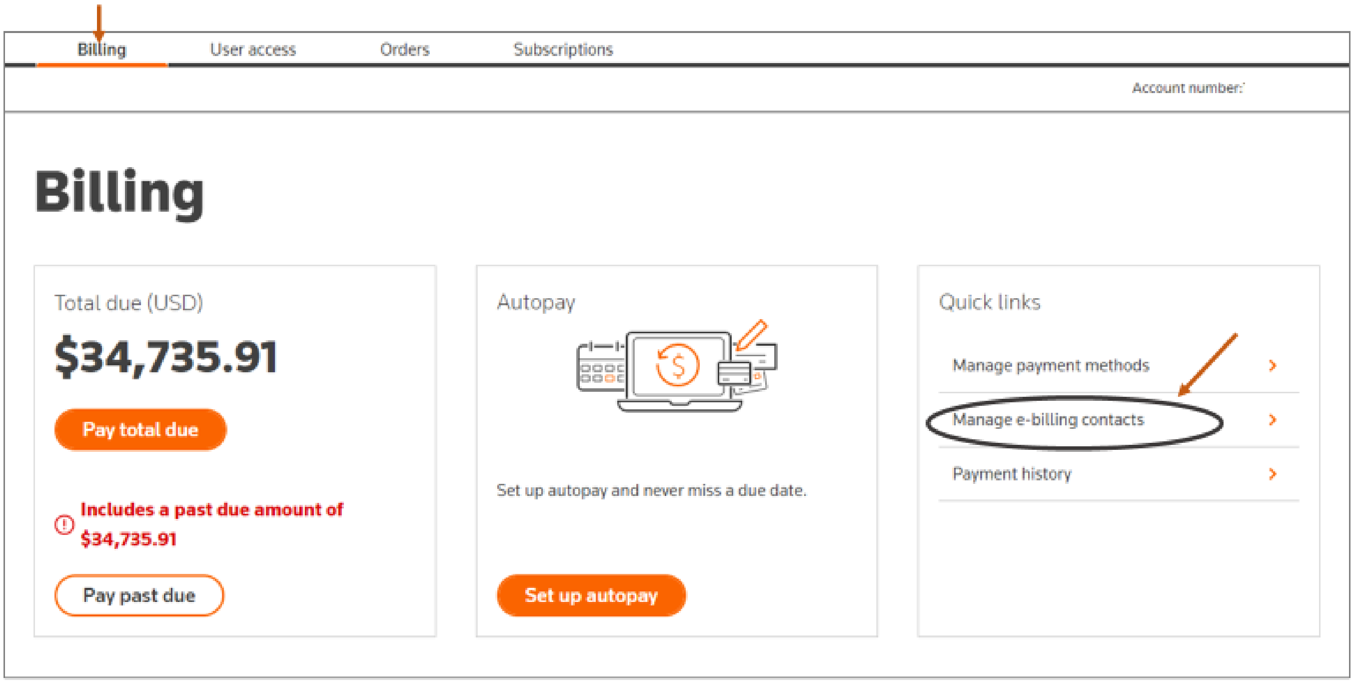


Then, click **Delete** in the popup window.



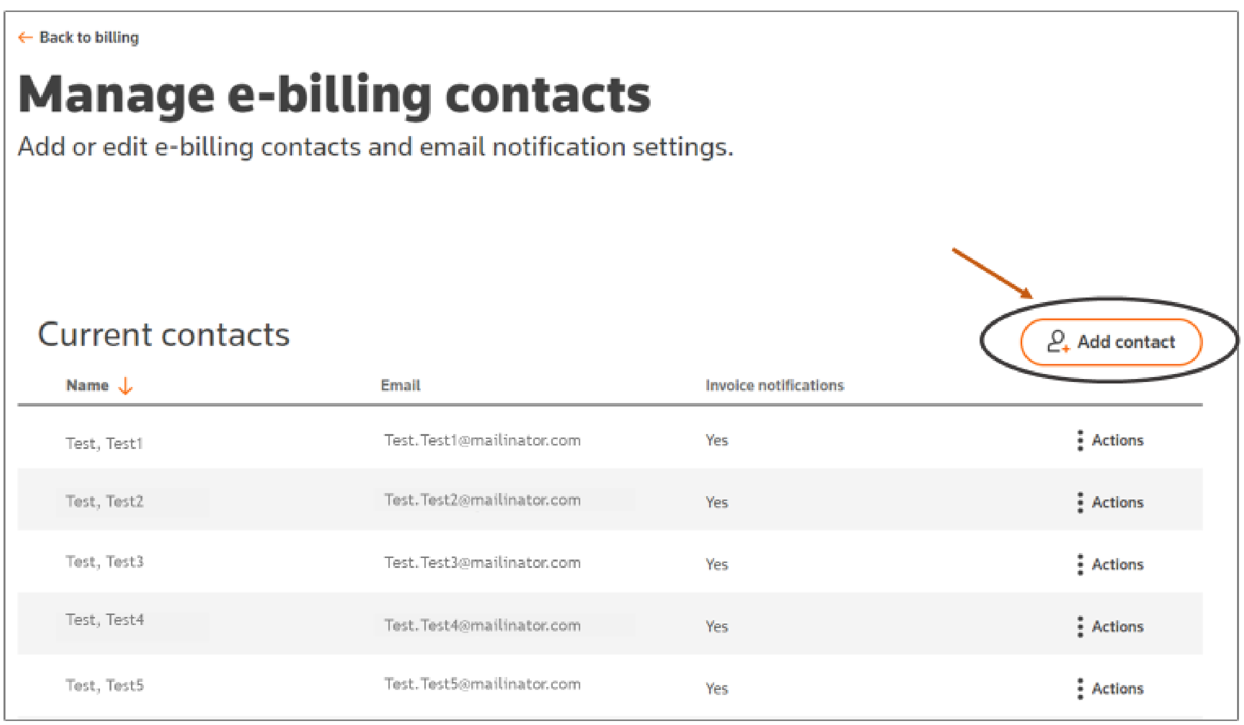
Manage e-Billing Contacts

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

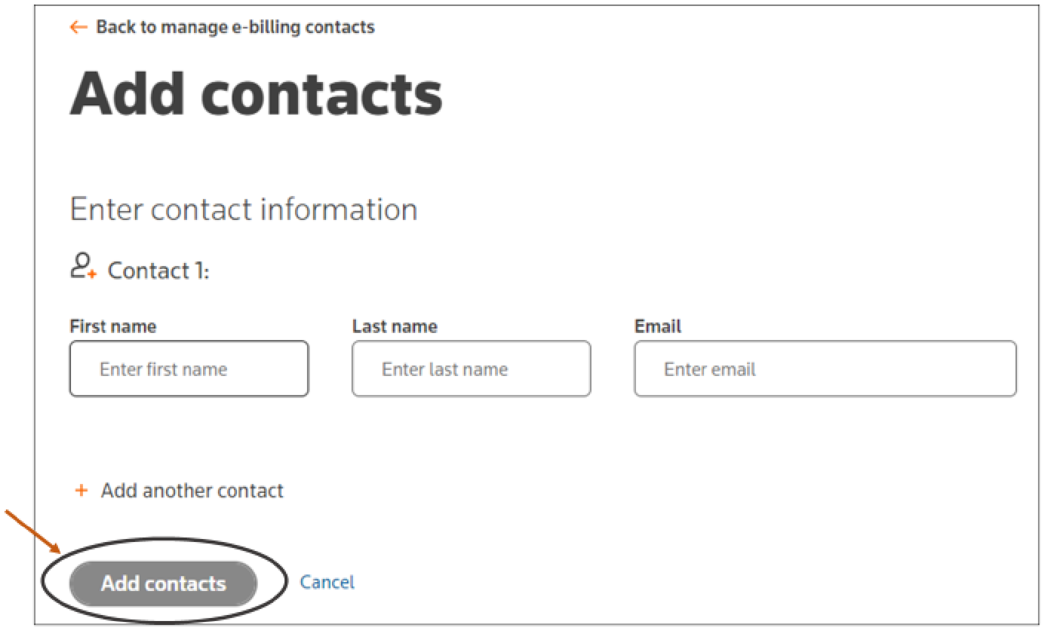


Add an e-Billing Contact

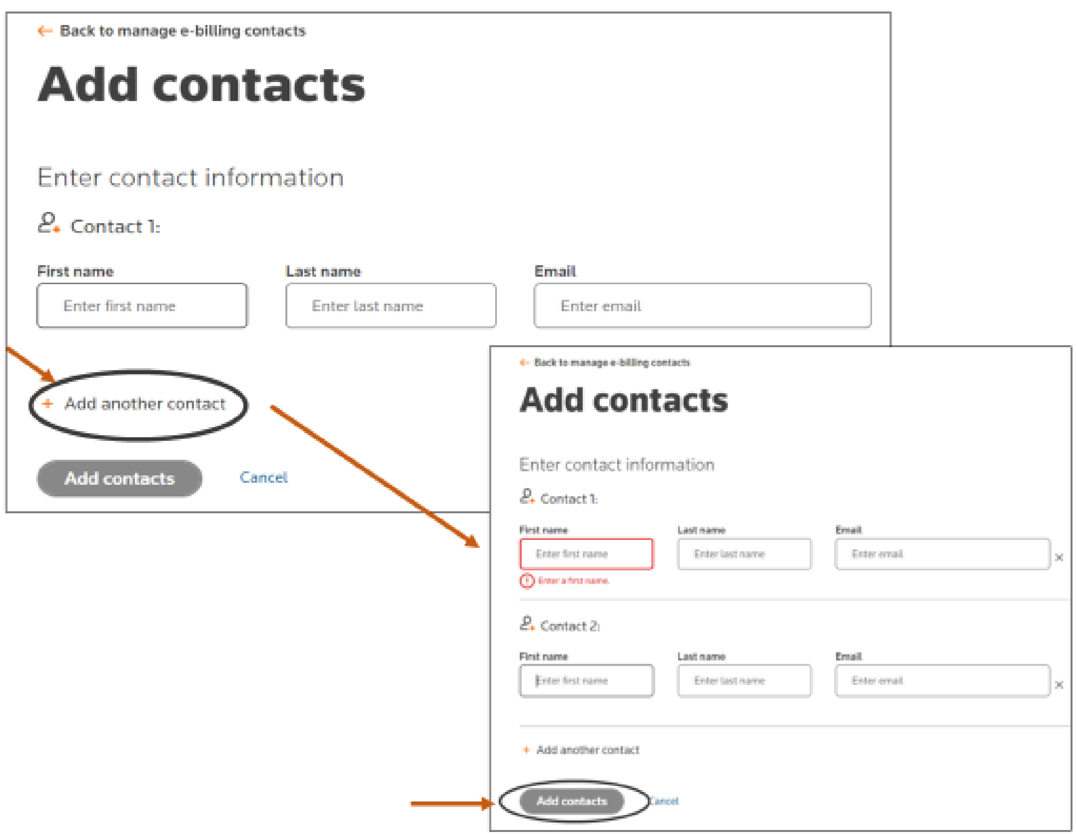
From the Manage e-billing contacts page, click **Add contact**.



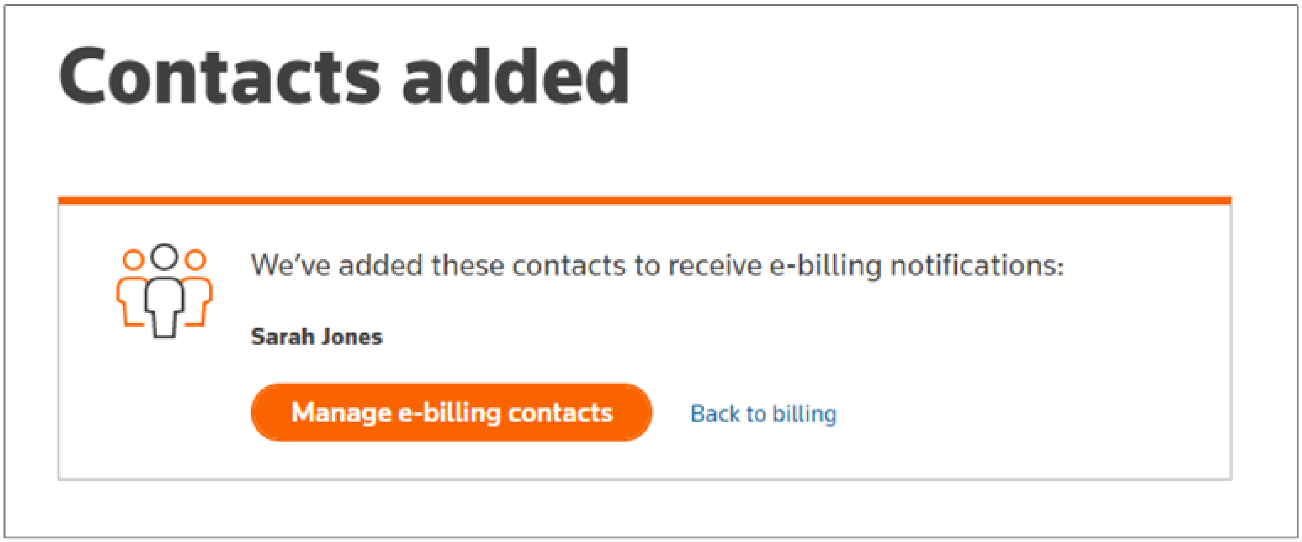
Add a first name, last name, and email address. Then, click **Add contacts**.



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**.

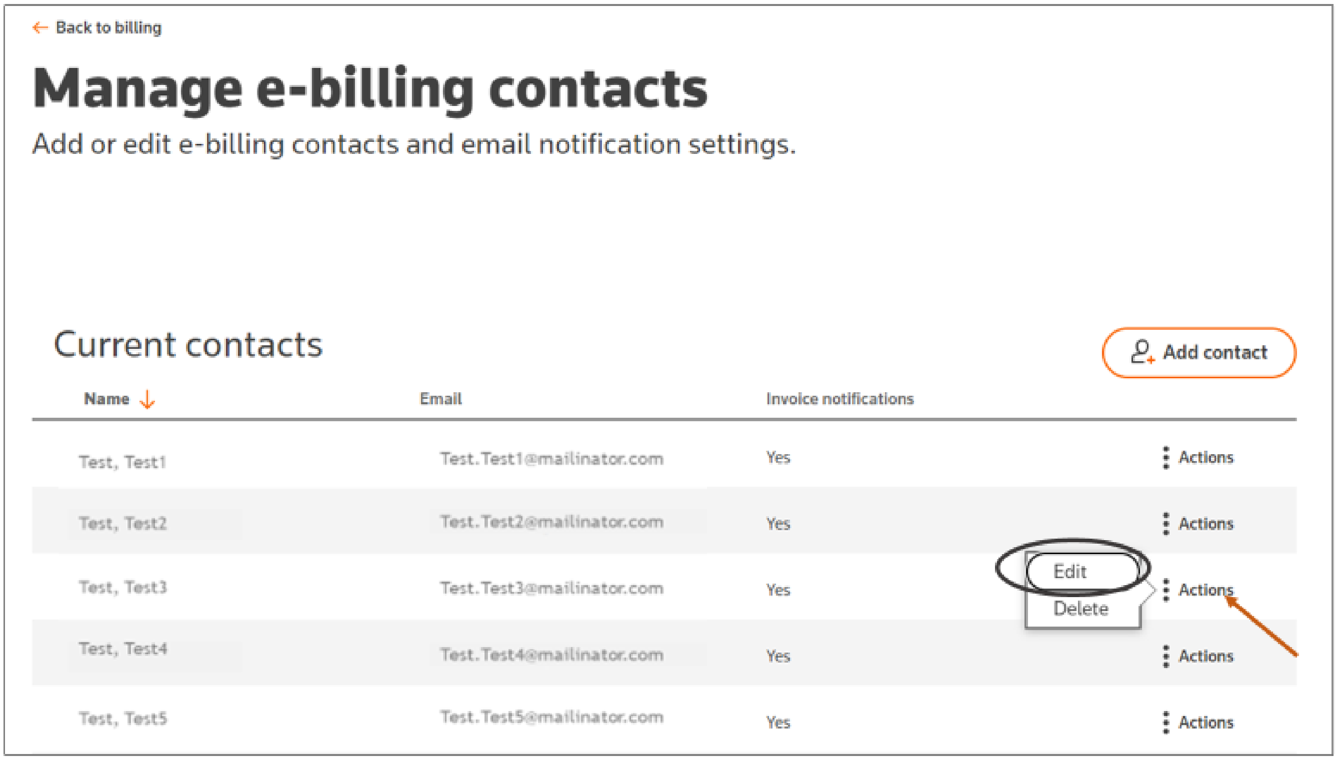


After adding contacts, you will see a confirmation box similar to the one below.



Edit an e-Billing Contact

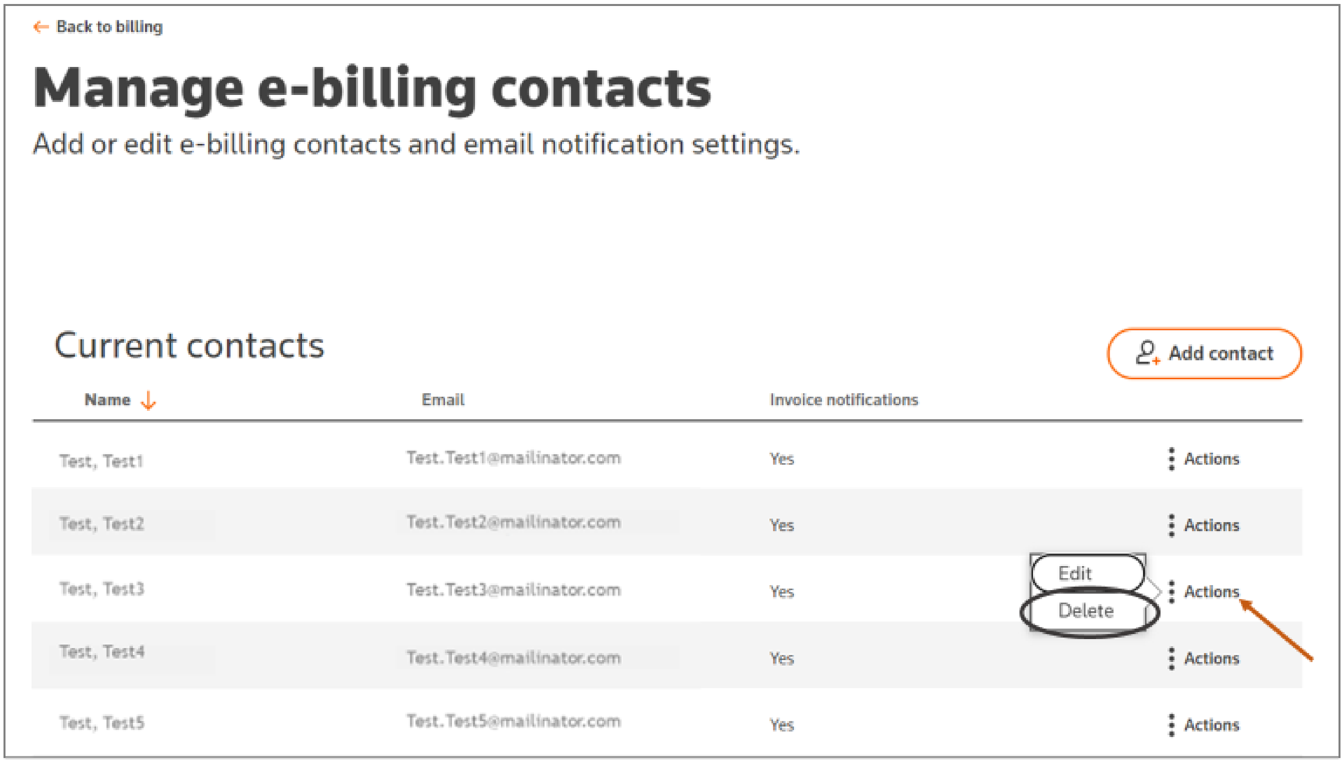
From the Manage e-billing contacts page, click **Actions** for the desired user and then select **Edit**.



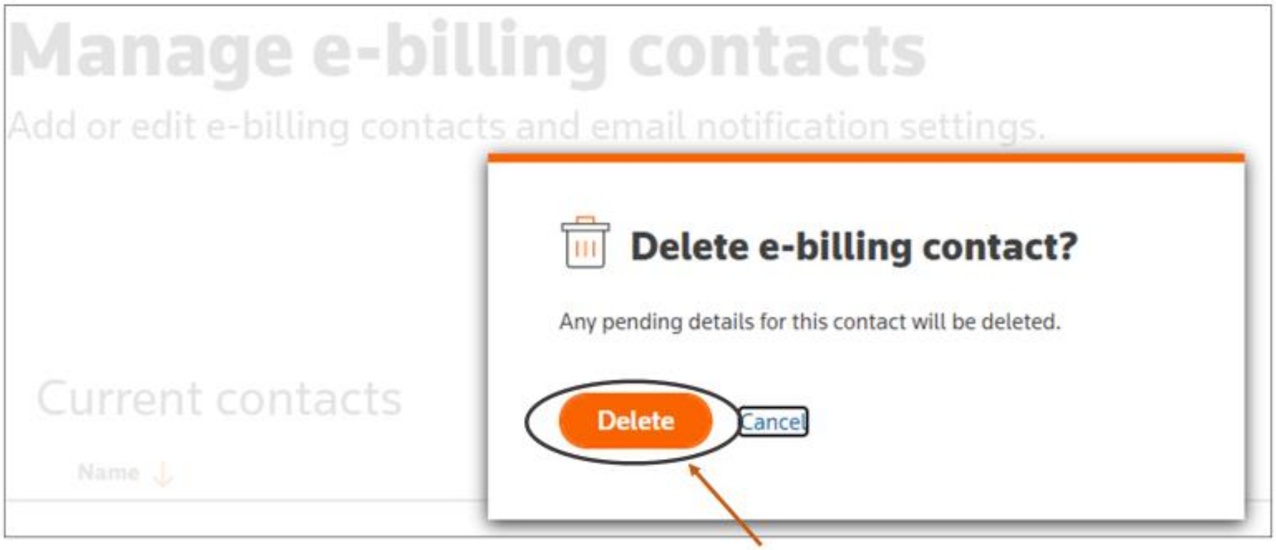
Next, make any changes to the first name, last name, or email address of the user and click **Save**.

Delete an e-Billing Contact

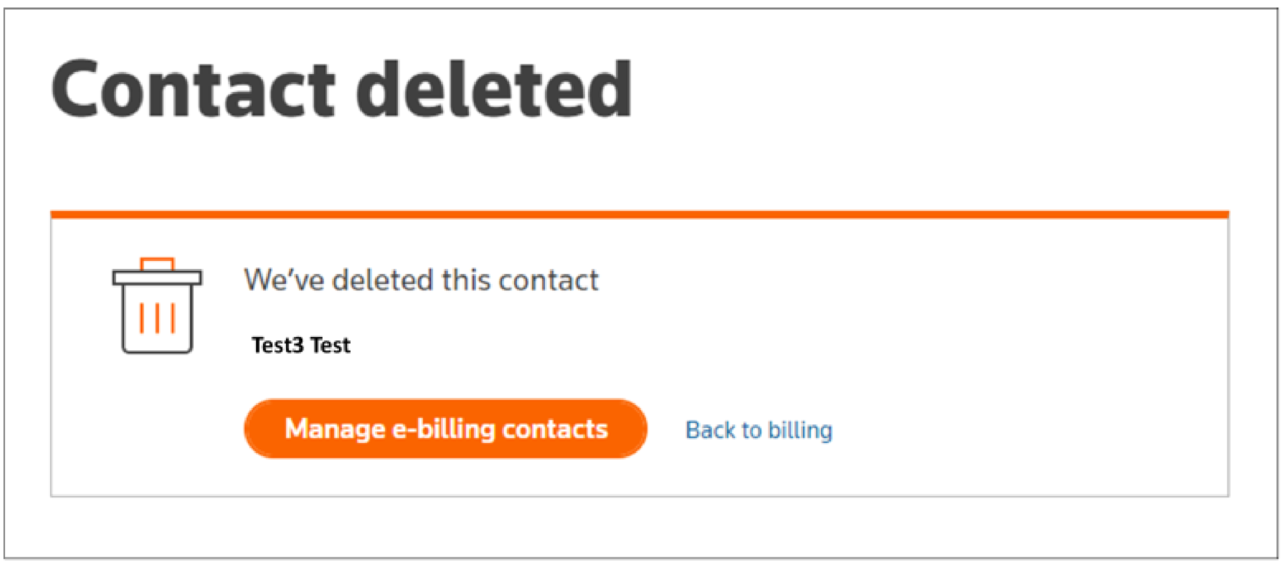
From the Manage e-billing contacts page, click **Actions** for the desired user and then select **Delete**.



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



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

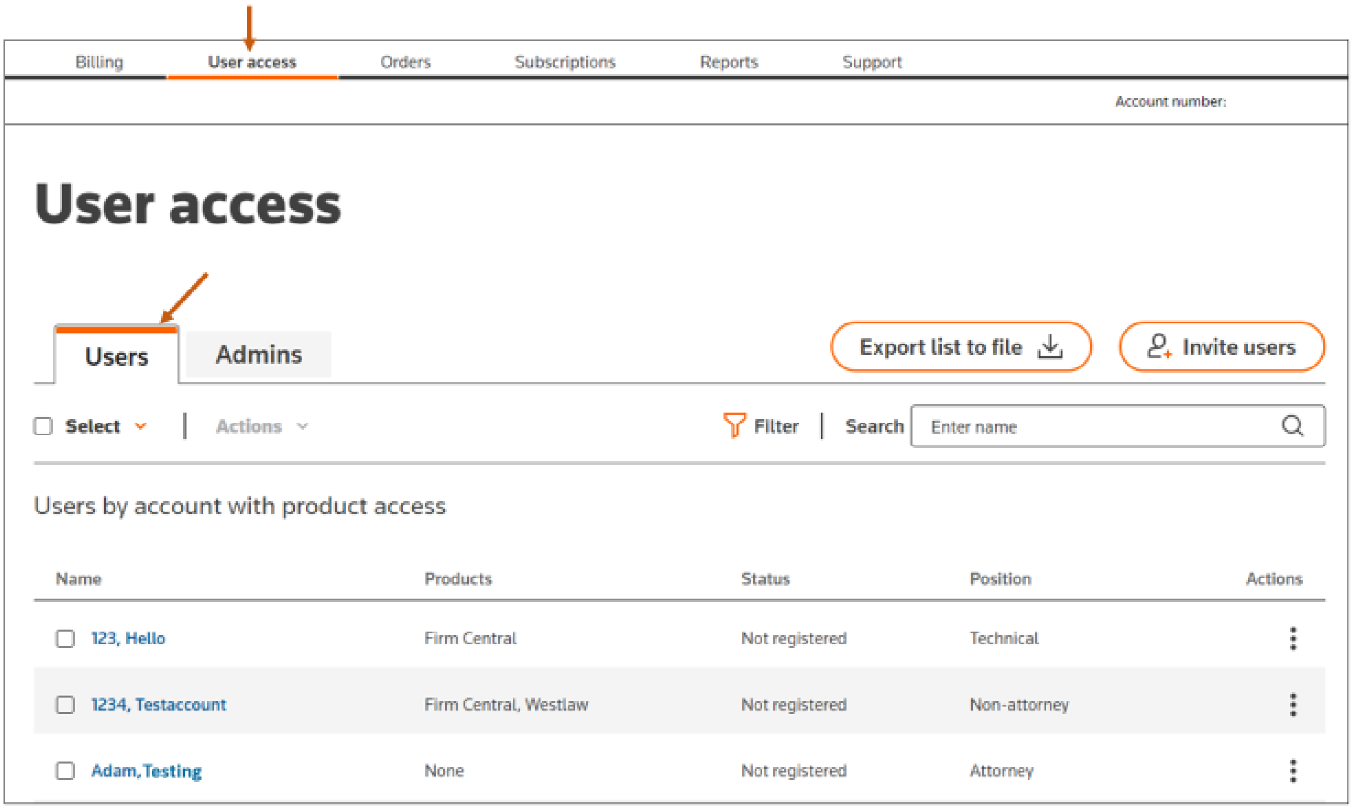


USER MANAGEMENT TASKS

View Users

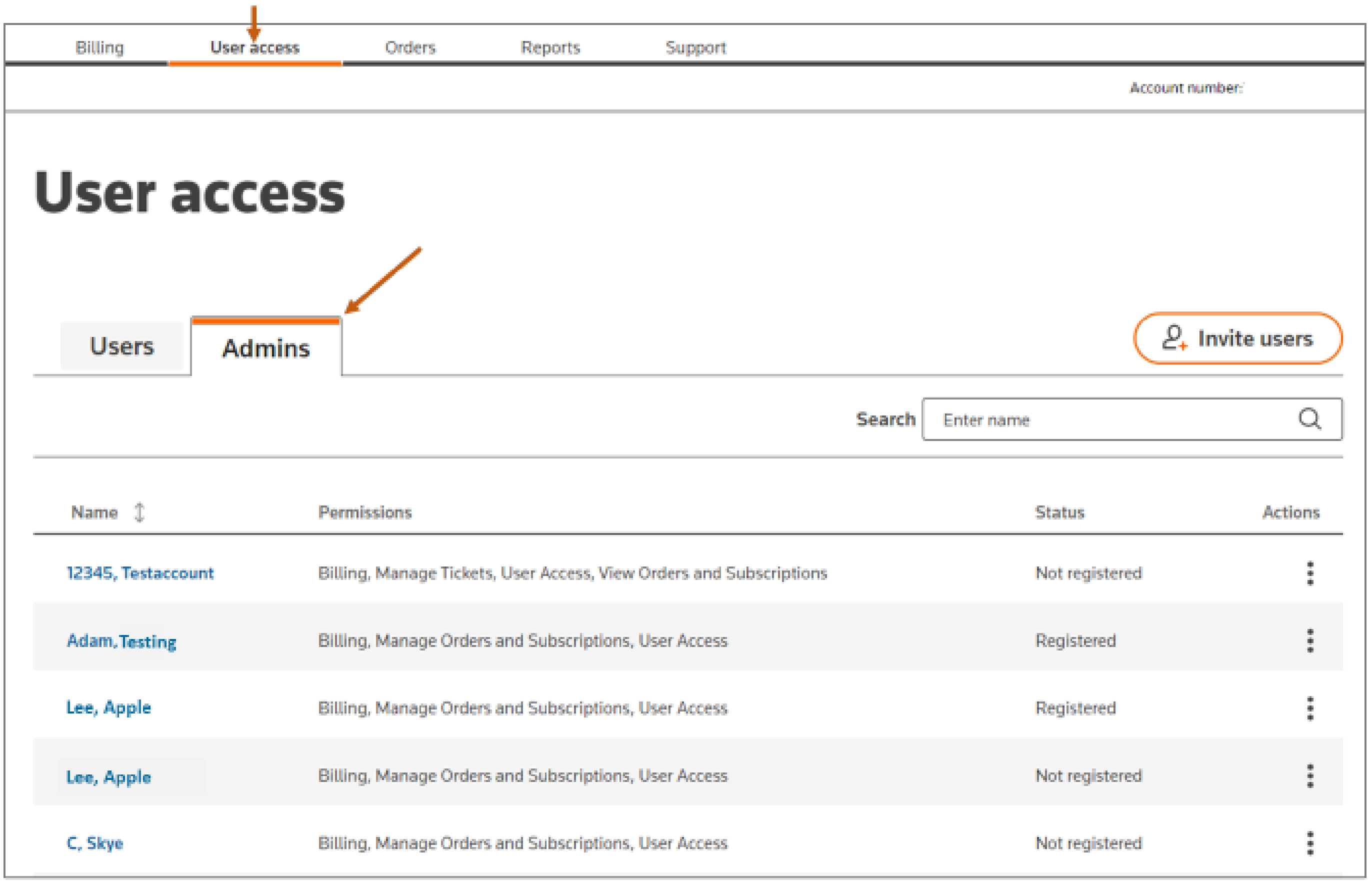
View Product Users

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



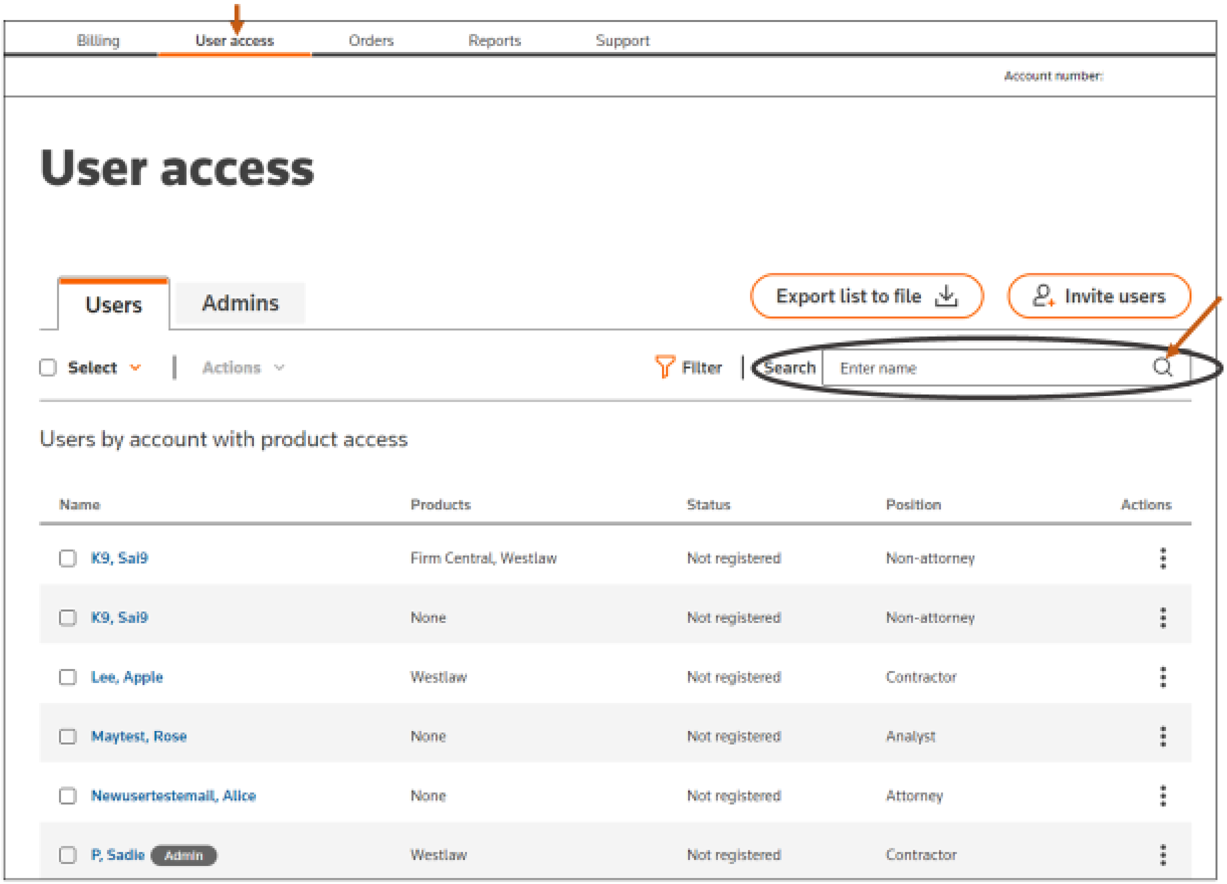
View Admin Users

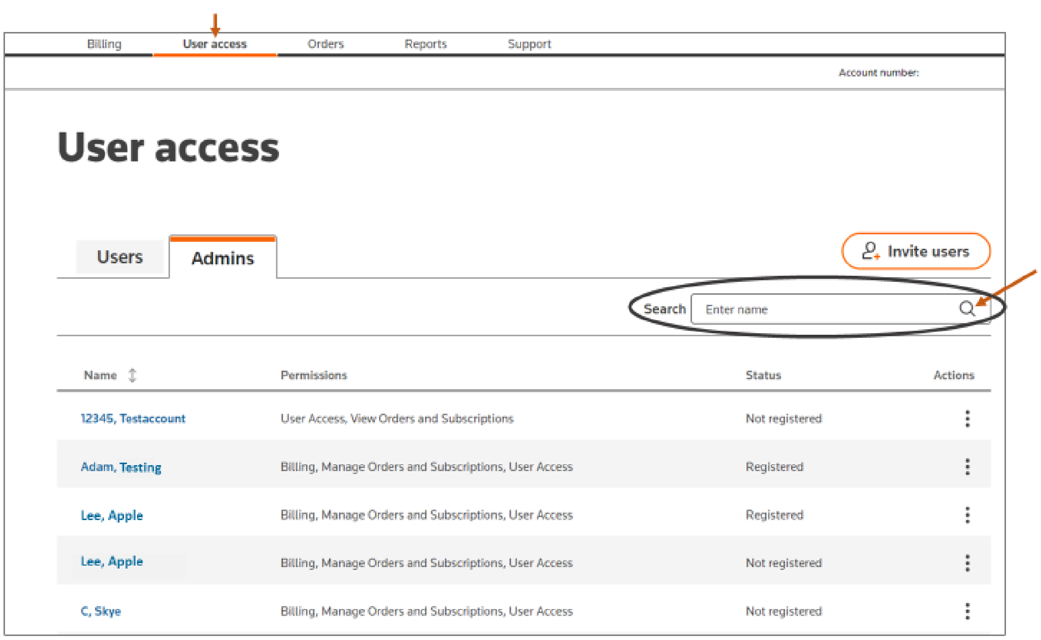
To view Administrators (users with administrative access), navigate to the **User access** tab and click on the **Admins** tab.



Search for Product or Admin Users

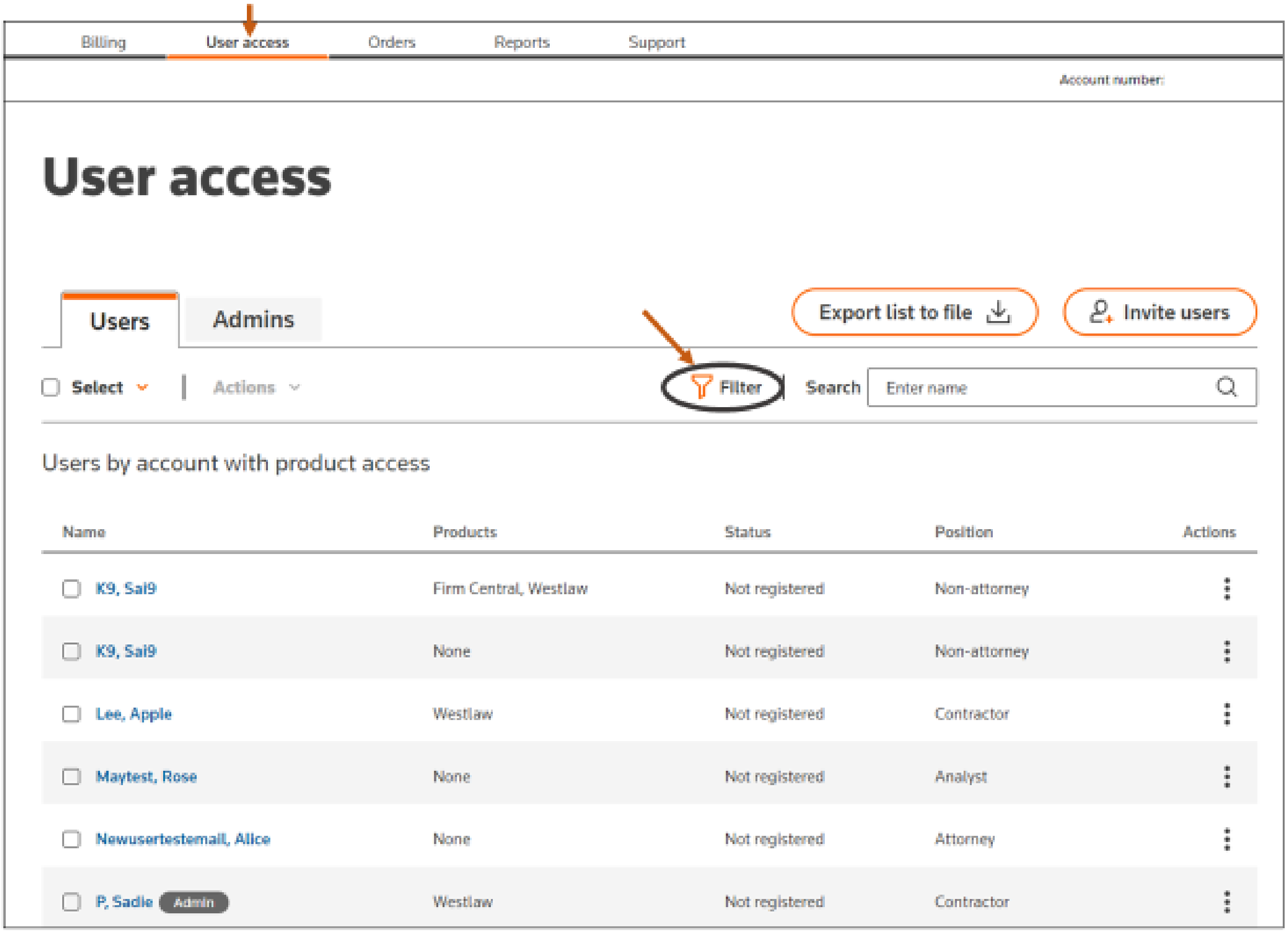
Navigate to the **User access** tab and enter a name in the **Search** bar above the **Users** list (as in the first image) or the **Admins** list (as in the second image)) on the right side.



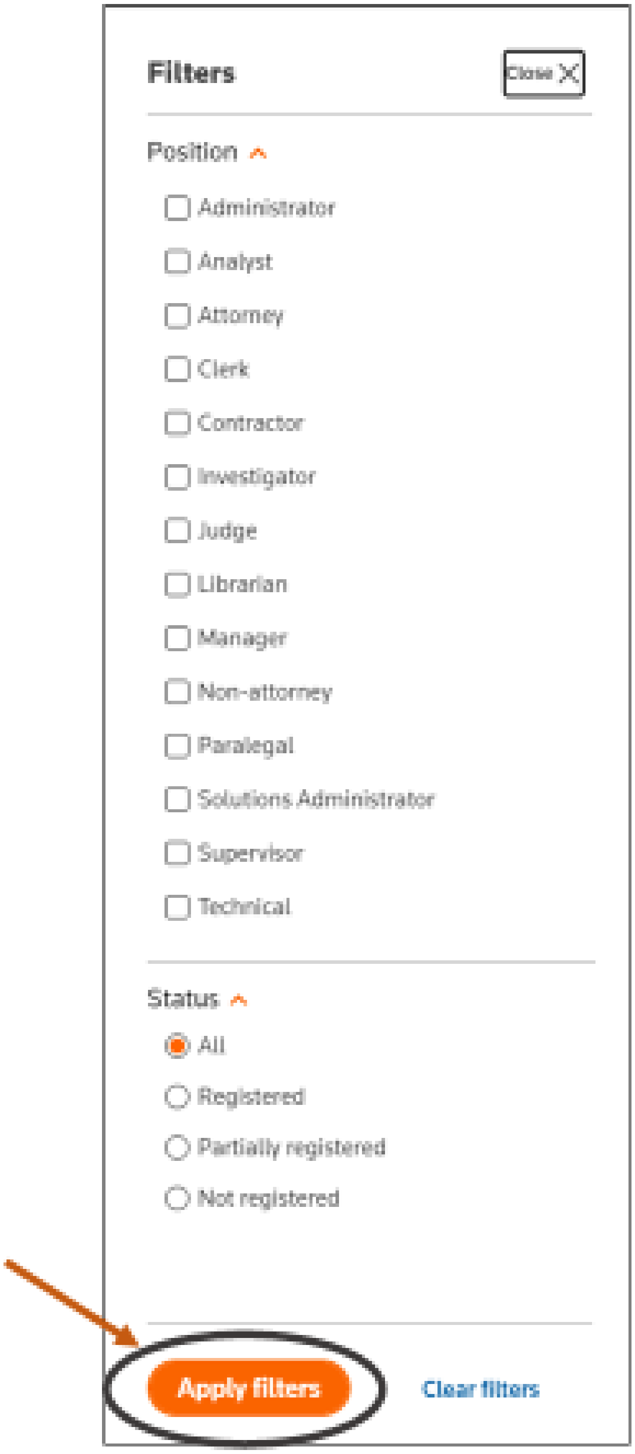


Filter Users

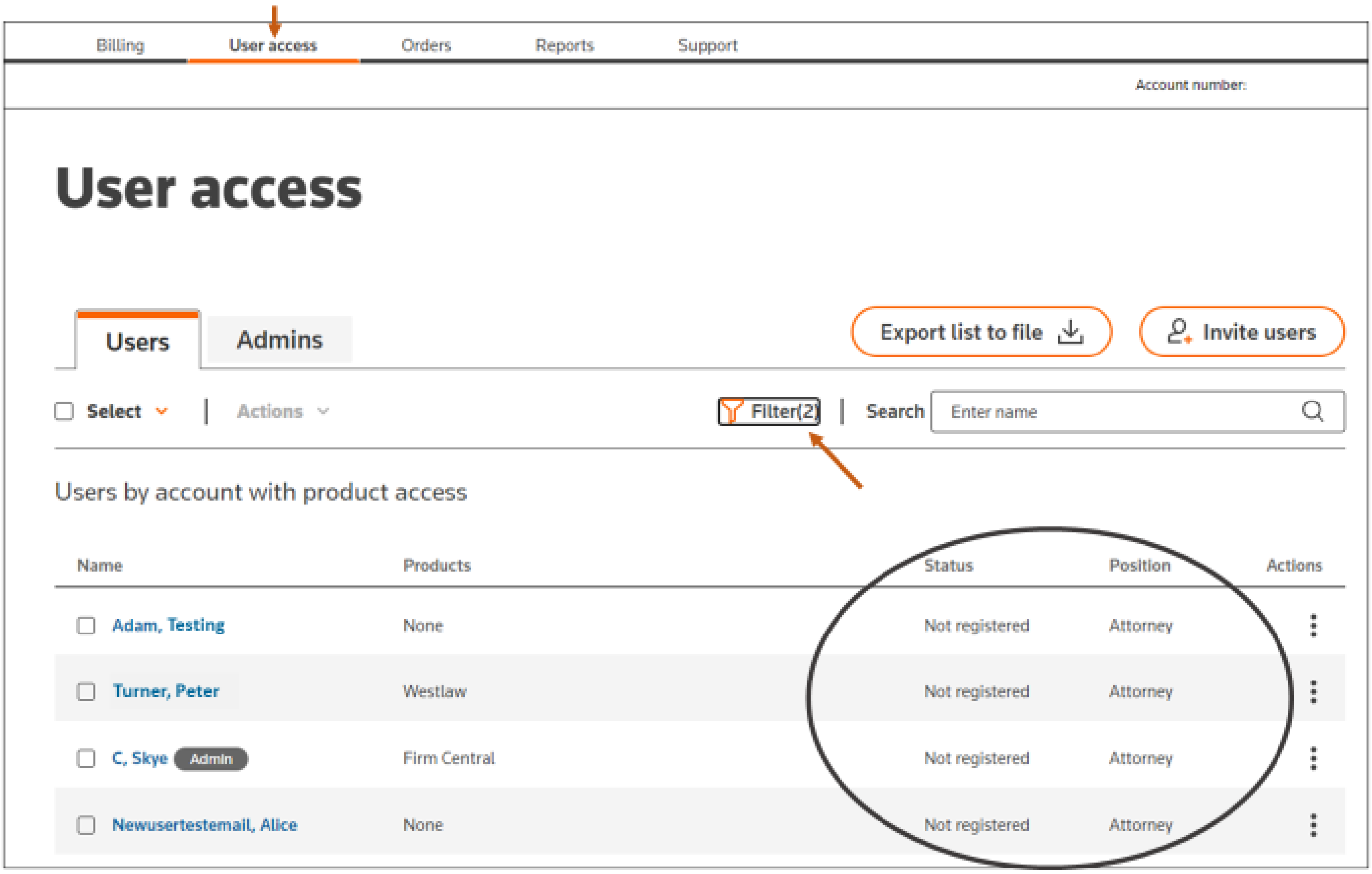
Navigate to the **User access** tab. Next, from the **Users** tab, click **Filter** to the left of the Search bar.



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

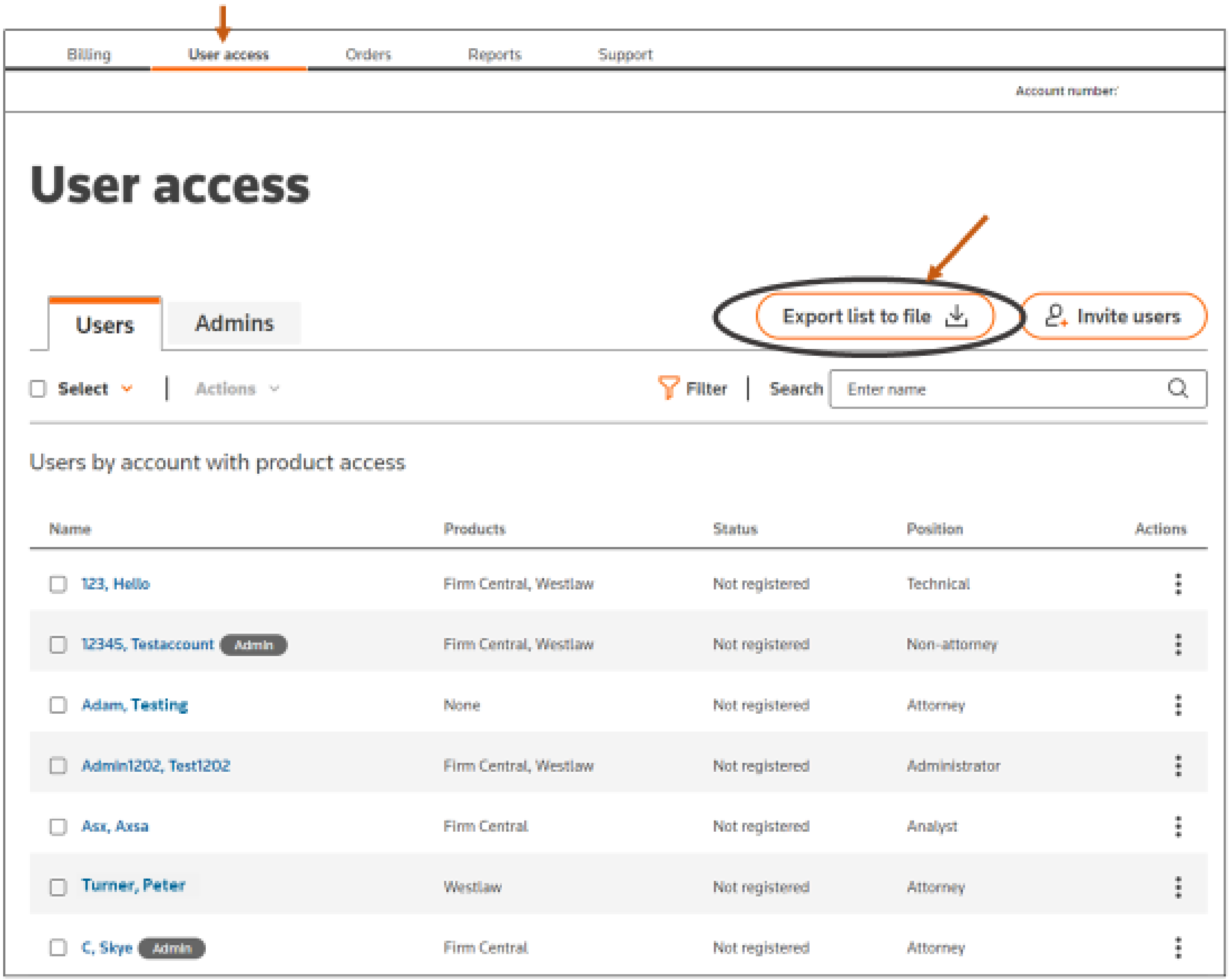


The **Users** list will now display only the filtered results, and the number of selected filters will display in parenthesis next to the **Filter** button.

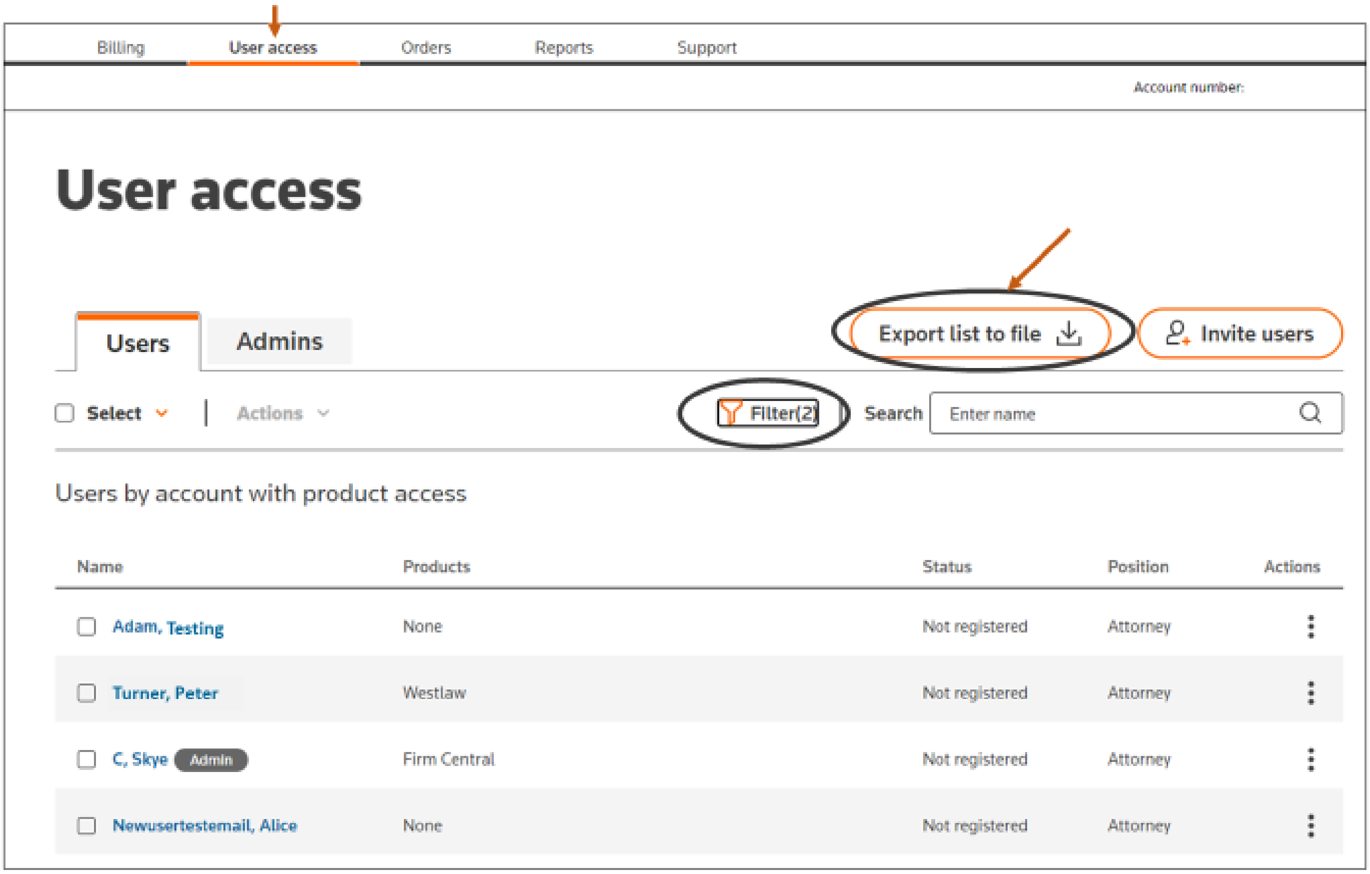


Export List of Users to File

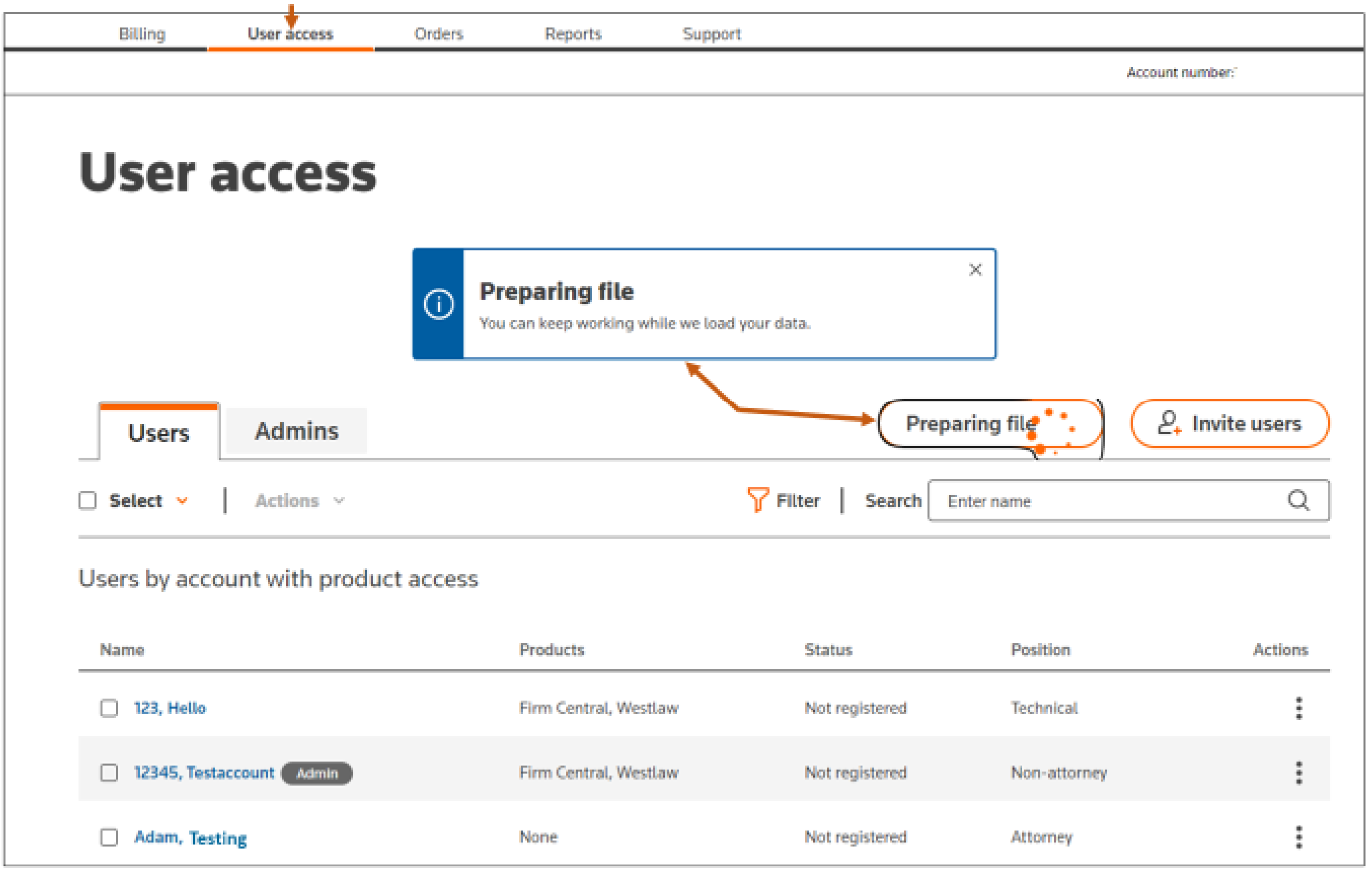
To export the list of users to an Excel file, navigate to the **User access** tab and click **Export list to file**.



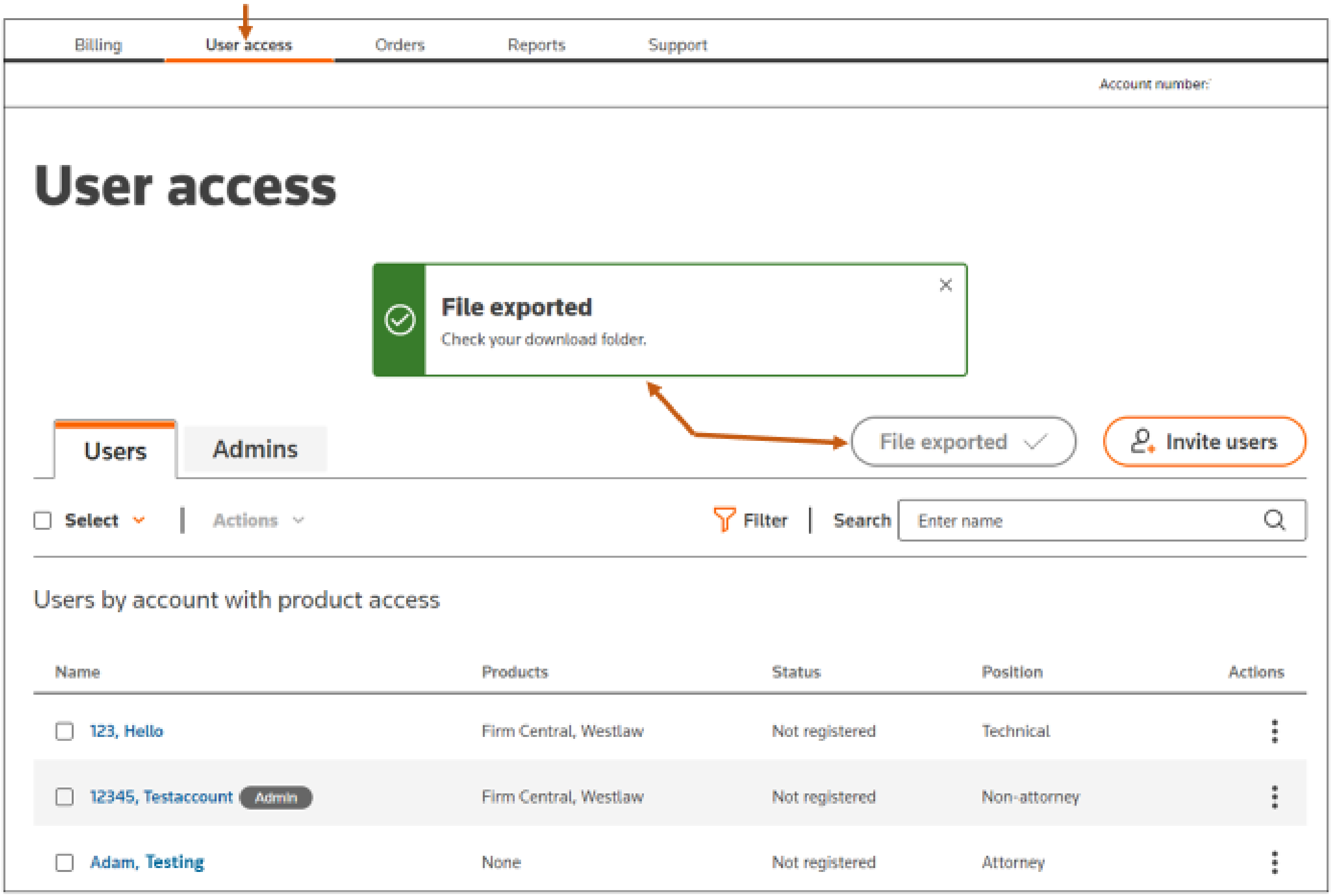
You can also click the **Export list to file** button after filtering to export the filtered list of users to an Excel file.



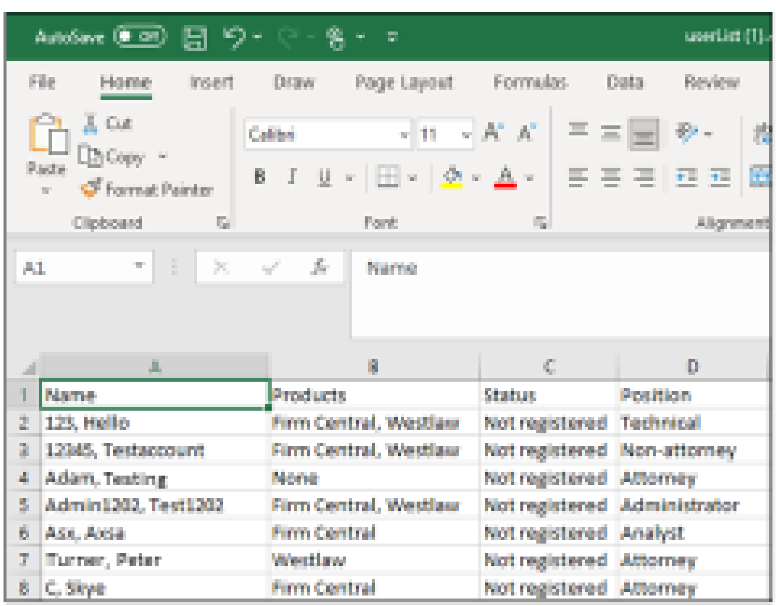
As the list of users downloads, you will see status boxes indicating that the file is being prepared to download.



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



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

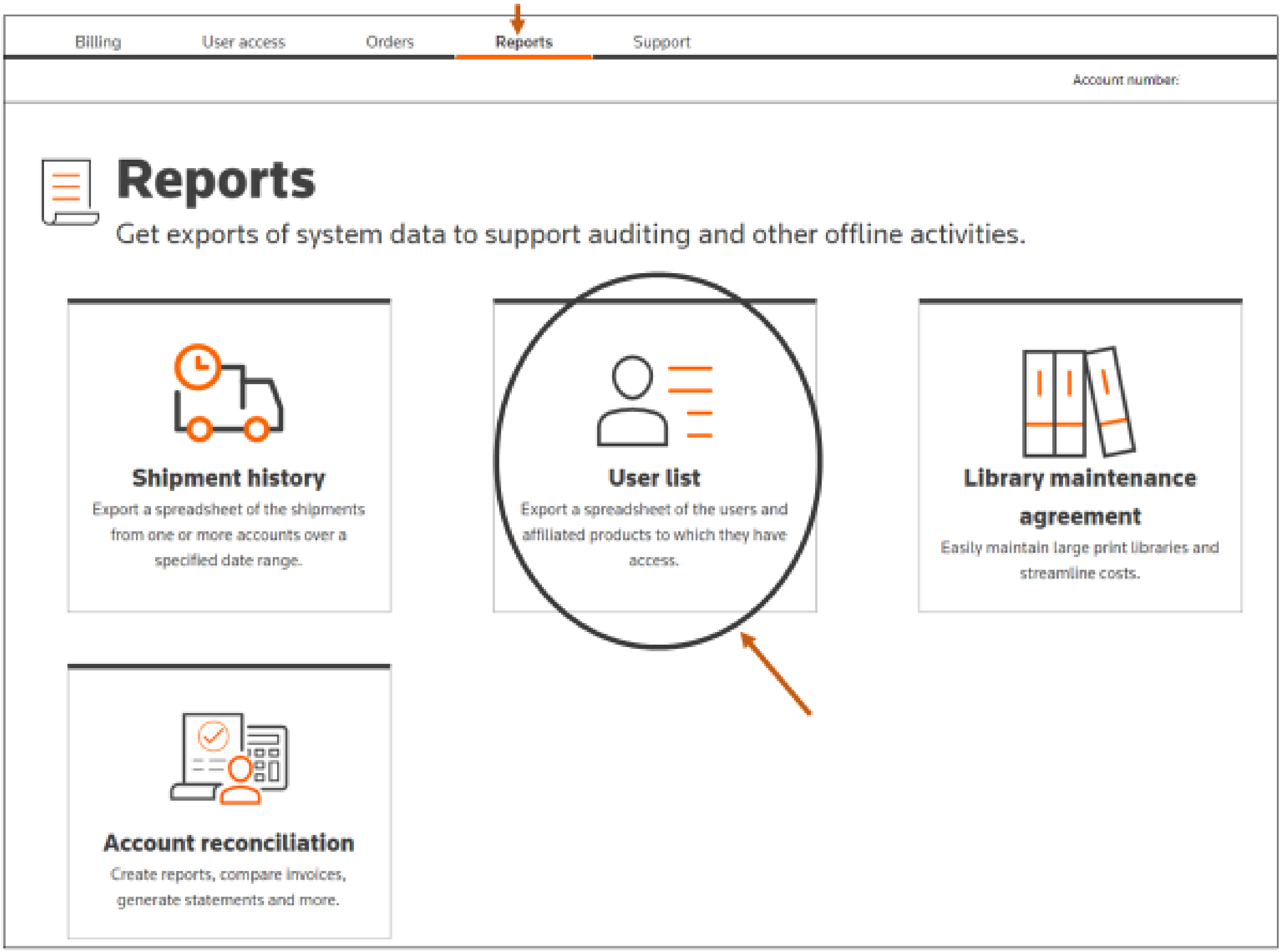


Name	Products	Status	Position
123, Hello	Firm Central, Westlaw	Not registered	Technical
12345, Testaccount	Firm Central, Westlaw	Not registered	Non-attorney
Adam, Testing	None	Not registered	Attorney
Admin1202, Test1202	Firm Central, Westlaw	Not registered	Administrator
Asx, Axsa	Firm Central	Not registered	Analyst
Turner, Peter	Westlaw	Not registered	Attorney
C, Skye	Firm Central	Not registered	Attorney

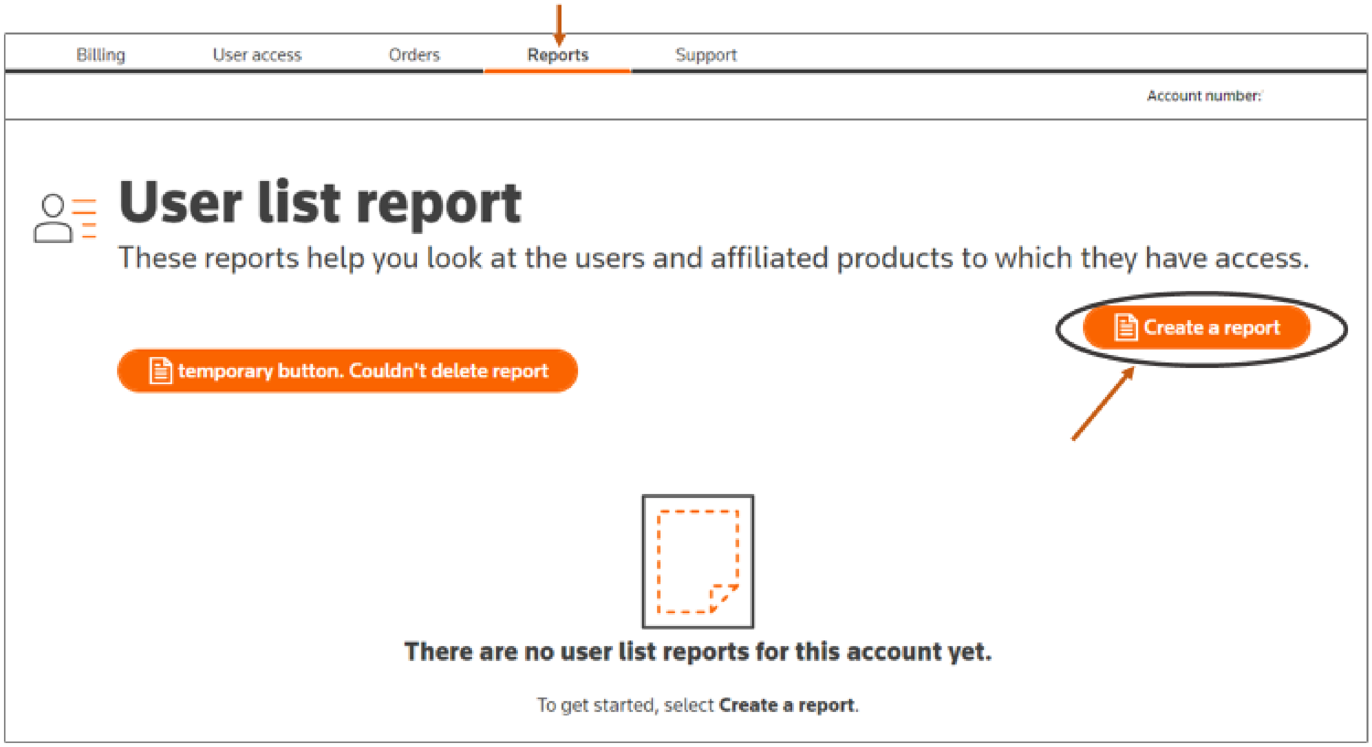
Get a Report of Users

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

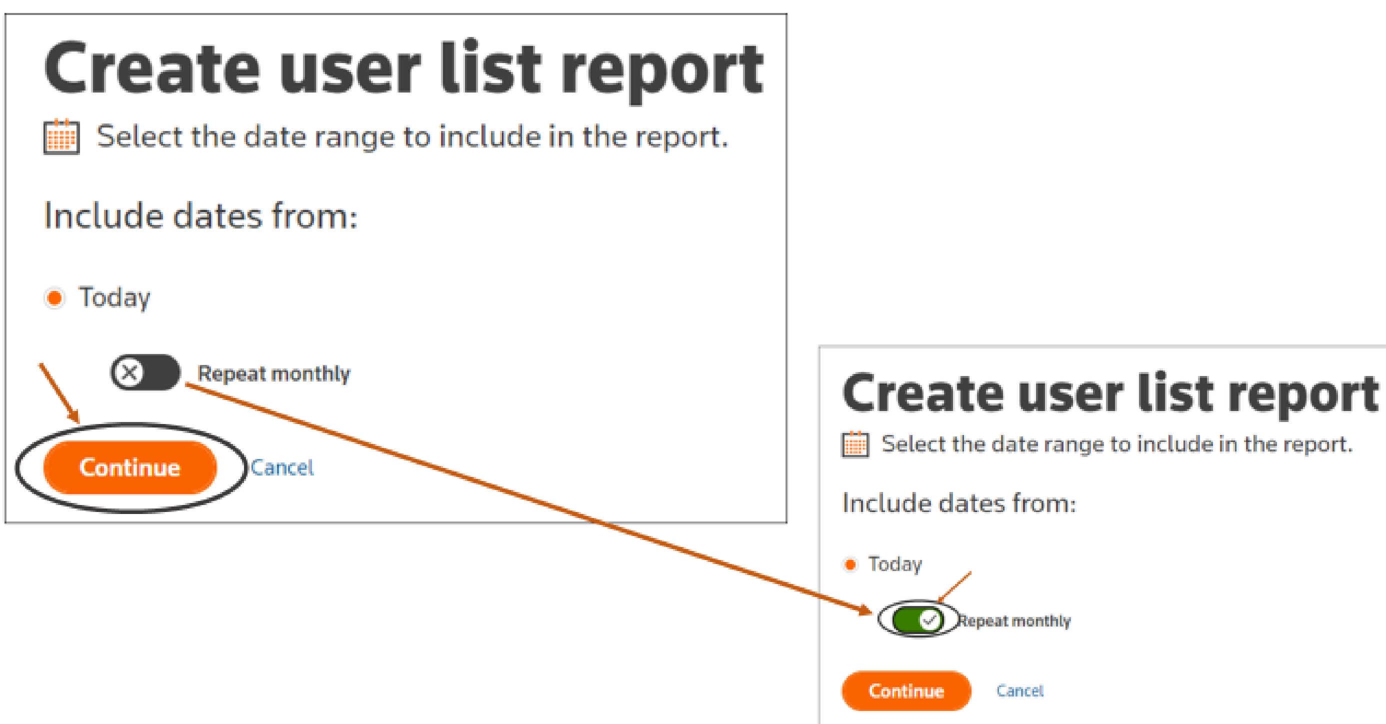
Navigate to the **Reports** tab and click **User list**.



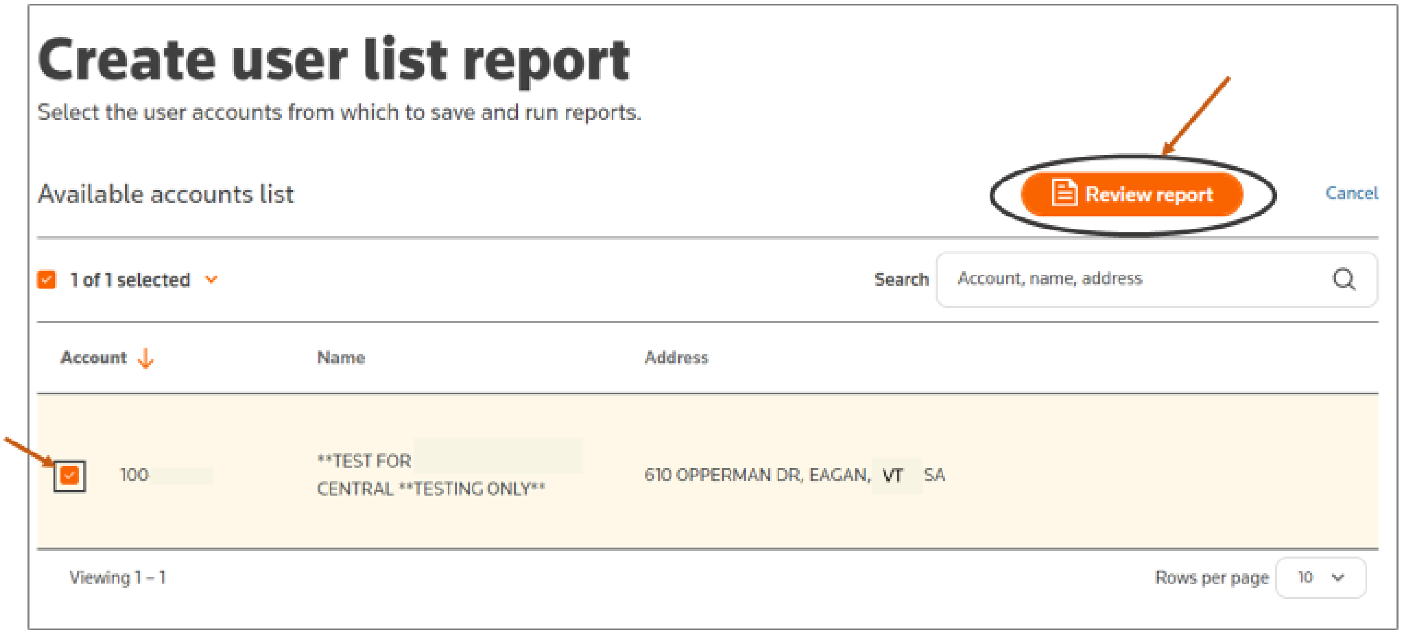
Next, click **Create a report**.



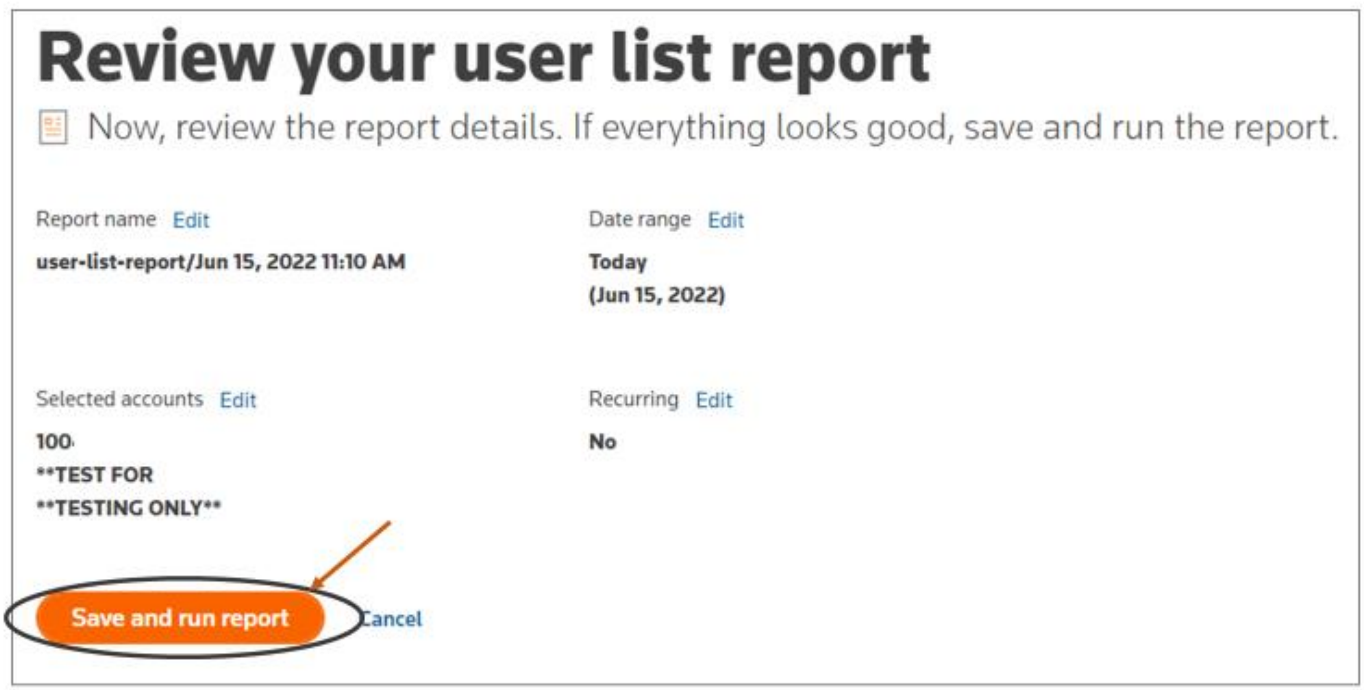
Next, determine whether you want the report to run monthly. If so, click the **Repeat monthly** toggle button so it appears green with a check mark before clicking Continue. Then, click **Continue**.



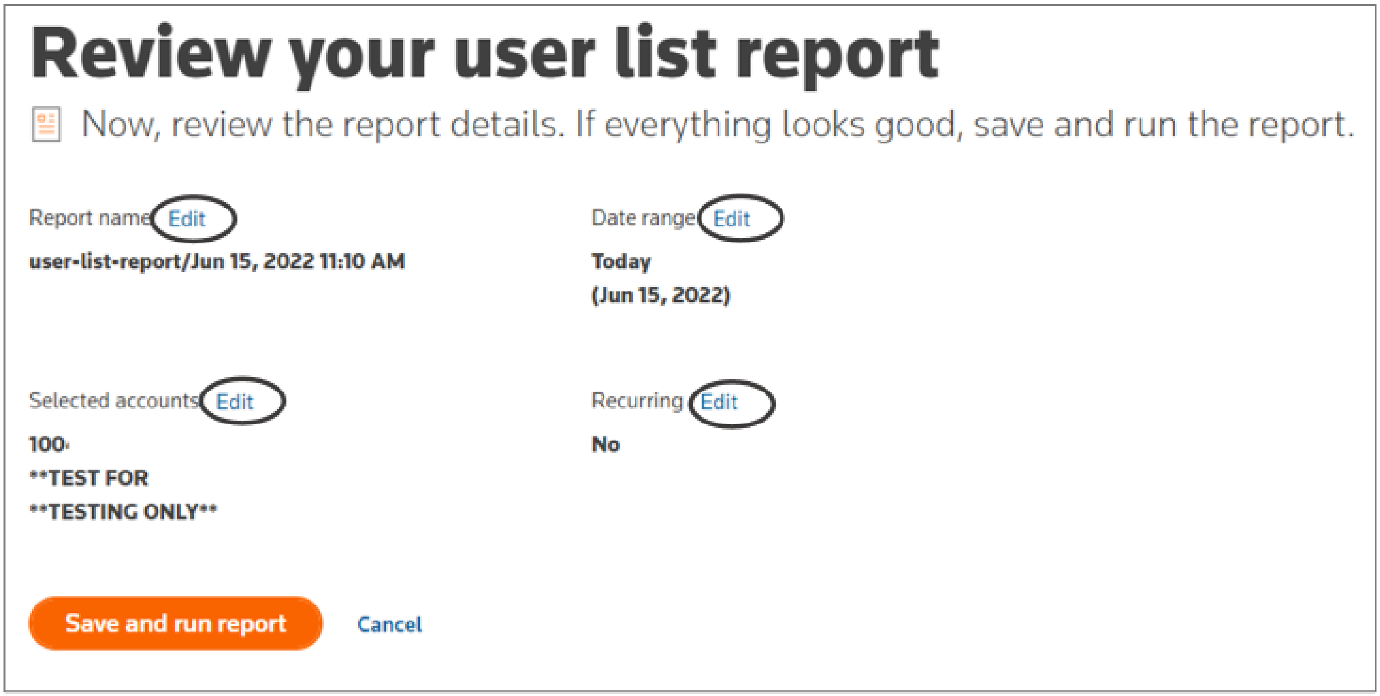
Next, select the accounts for which you want to run the report. Then, click **Review report**.



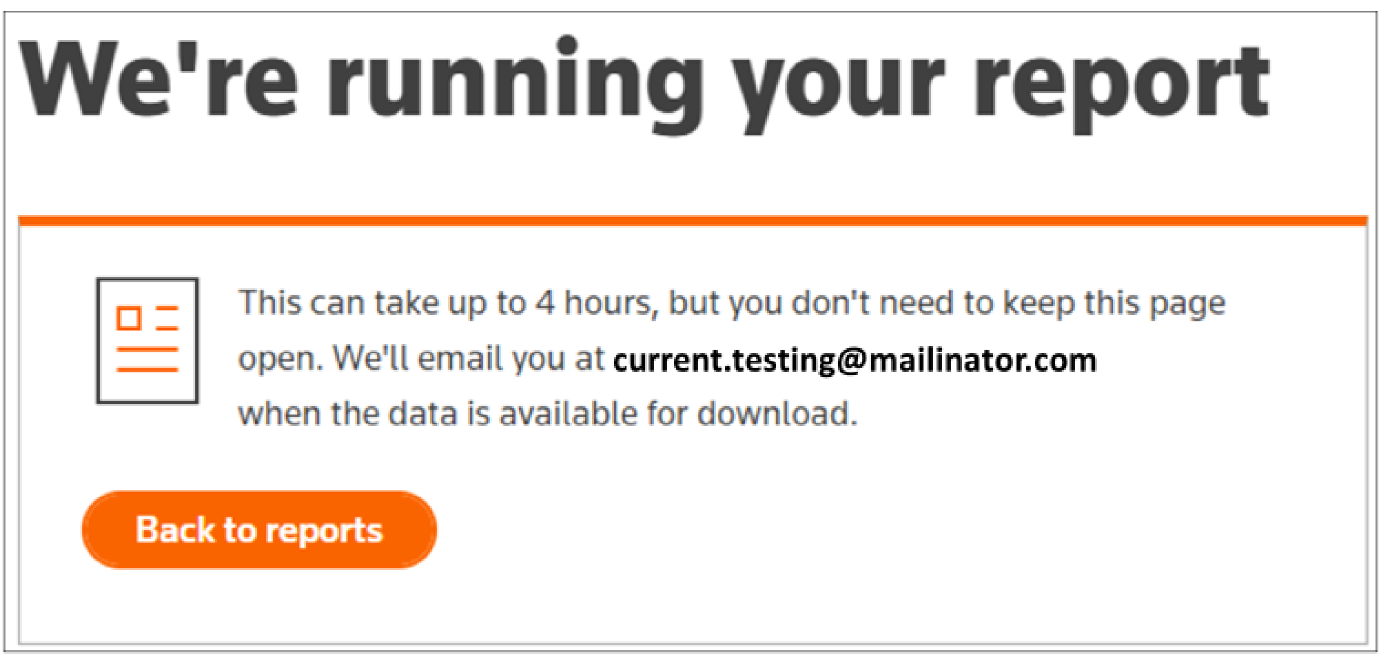
Next, review the report details. If the details are correct, then click **Save and run report**.



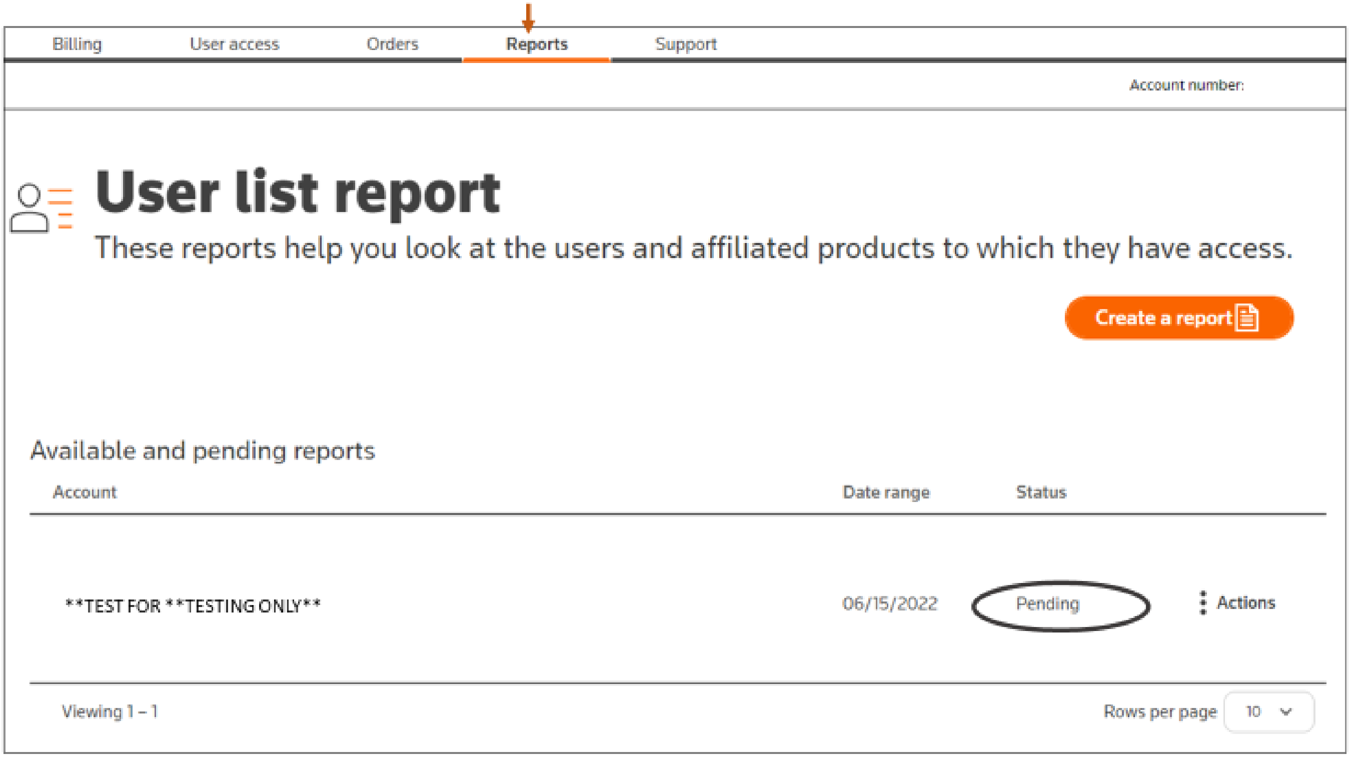
If any of the details are incorrect, click **Edit** next to the wrong information and make the necessary change before continuing.



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.



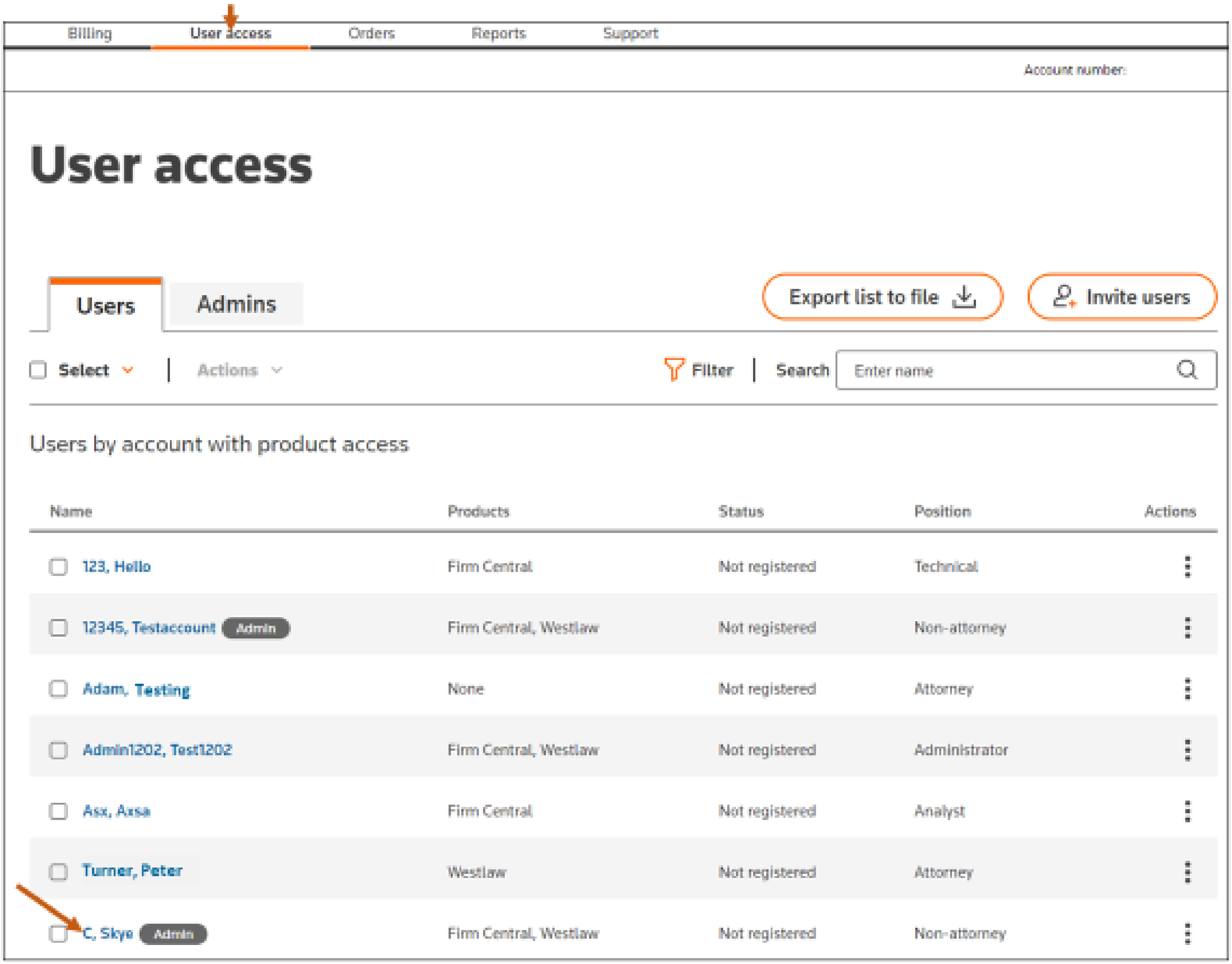
If you return to the **Reports** tab and click **User list**, you will see the status of your report.



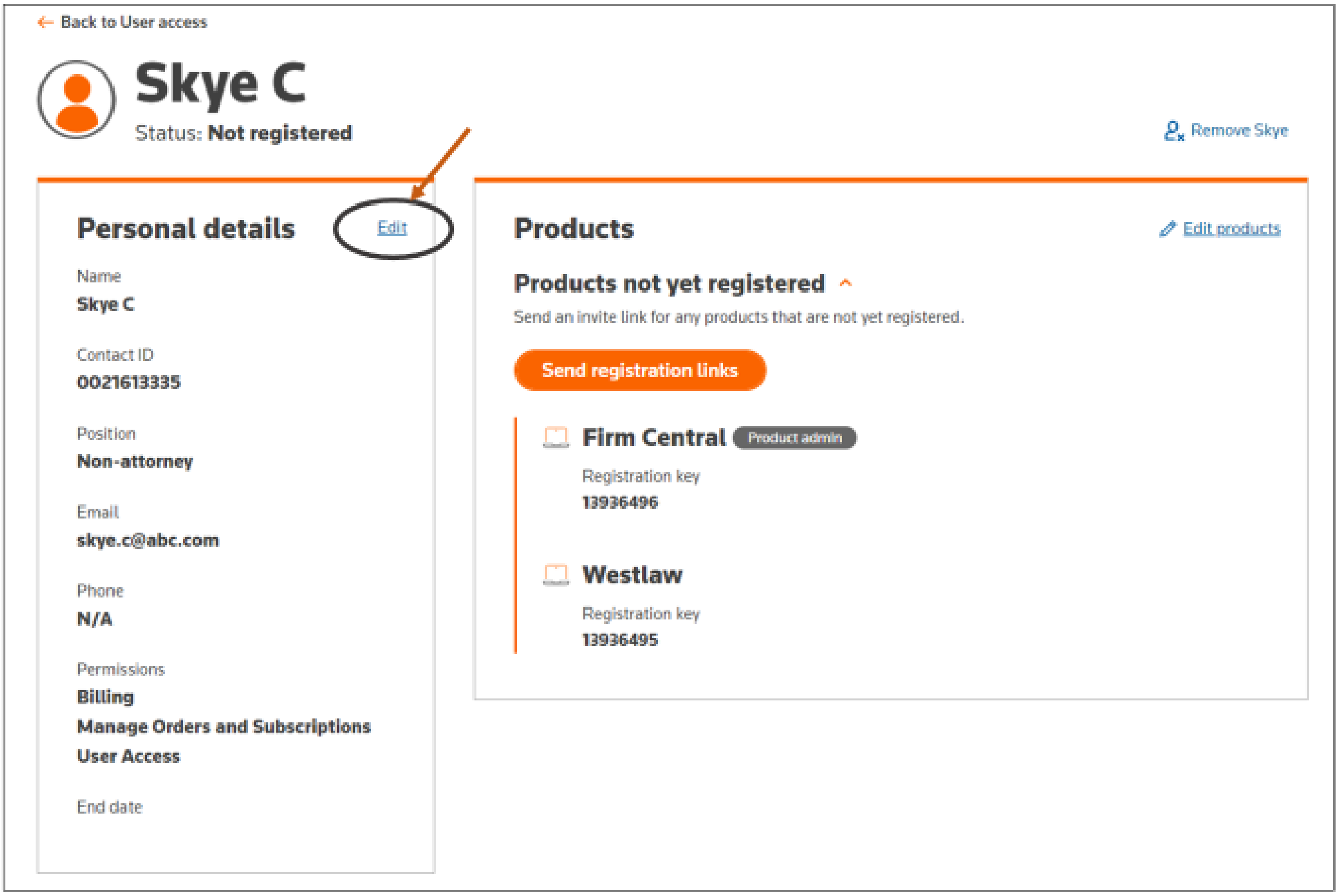
Manage Product Users

View and Edit User Details

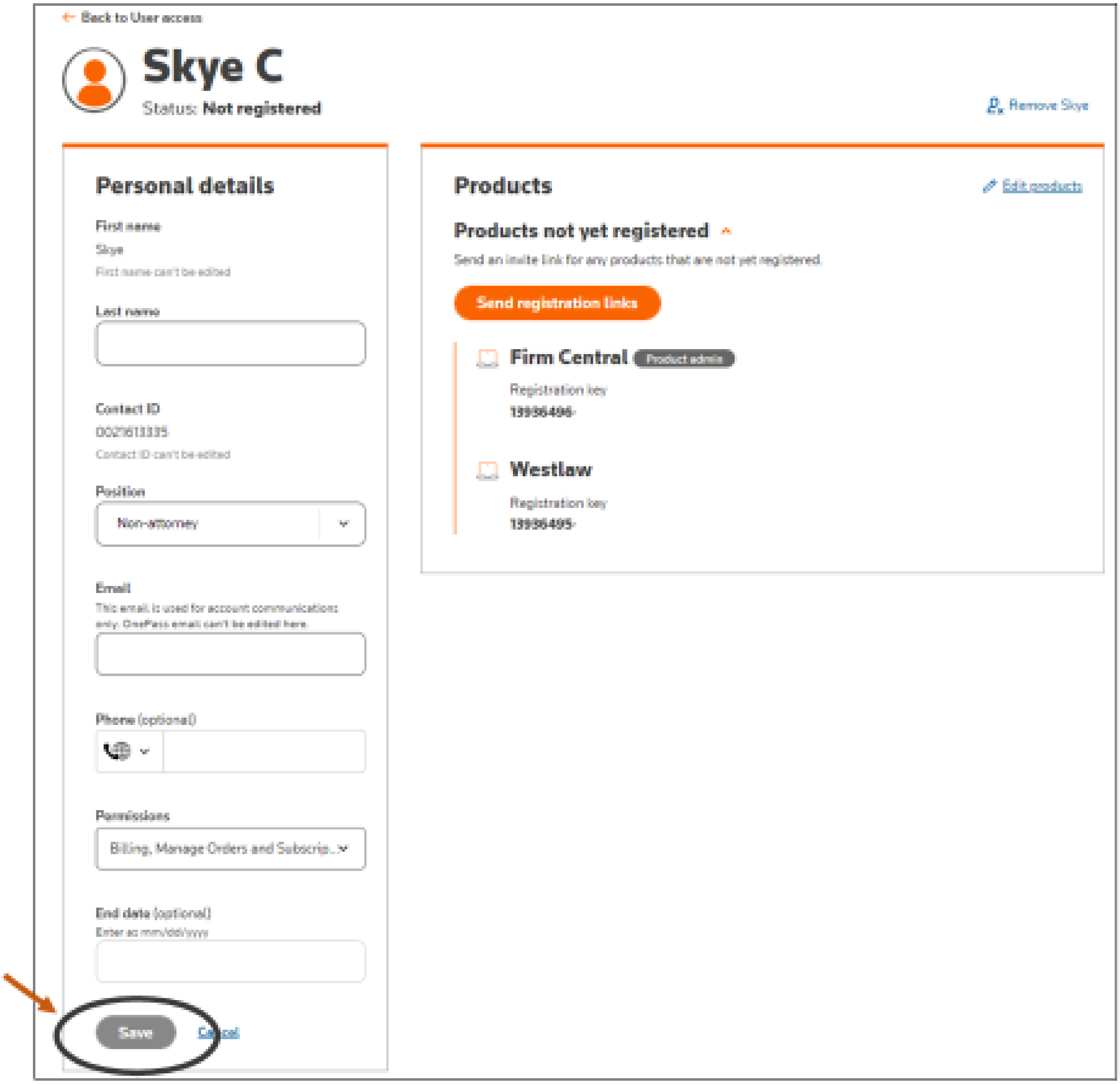
To view a product user's details, navigate to the **User access** tab and click on the desired user's name.



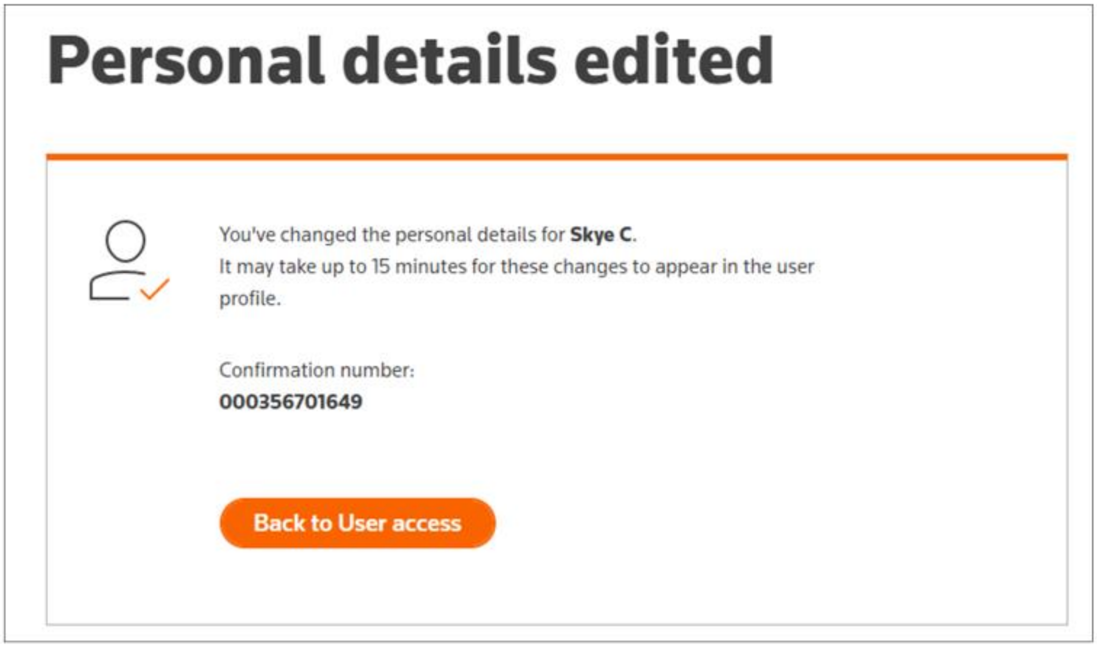
Next, view the user's personal details and product access. To edit the user's personal details, click on **Edit** on the right-side of the **Personal details** box.



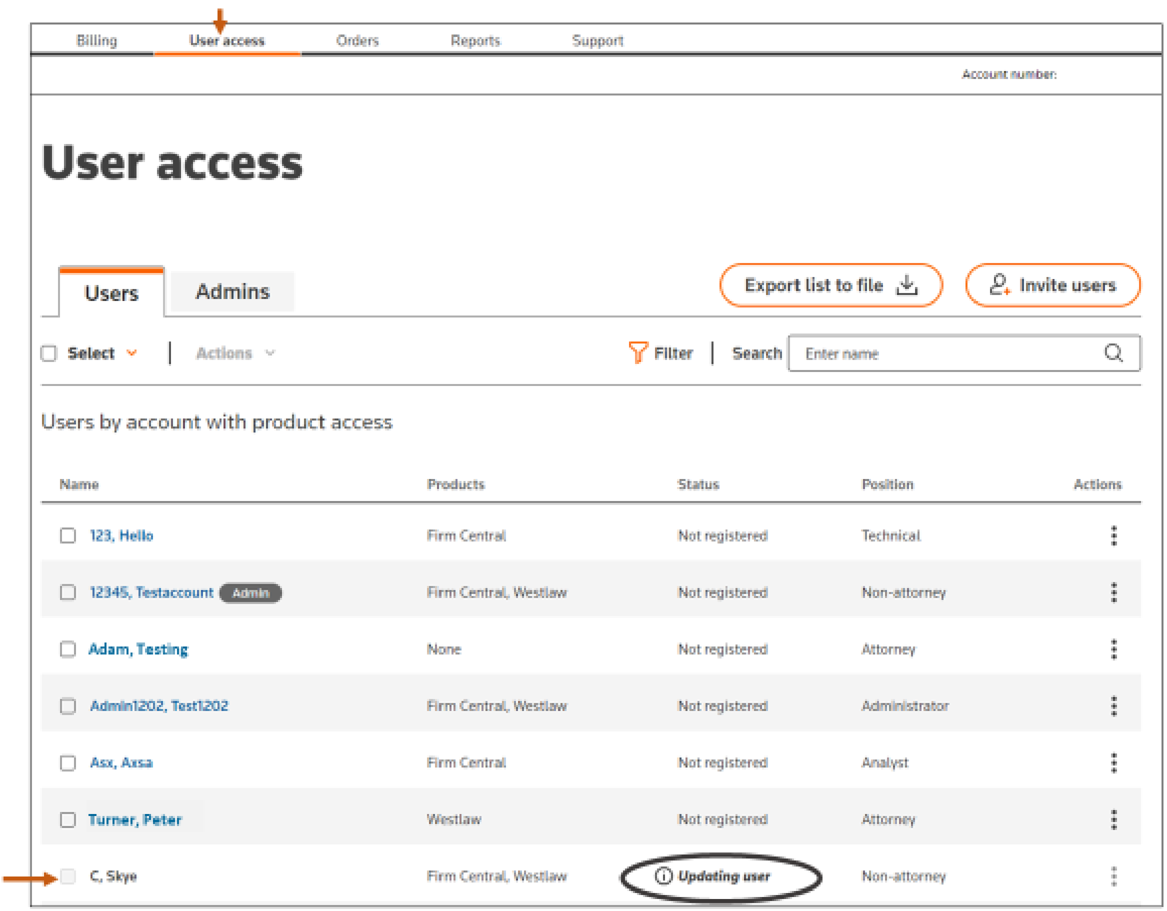
Make any desired changes to the user's last name, email address, phone number or permissions. Then, click **Save**.



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

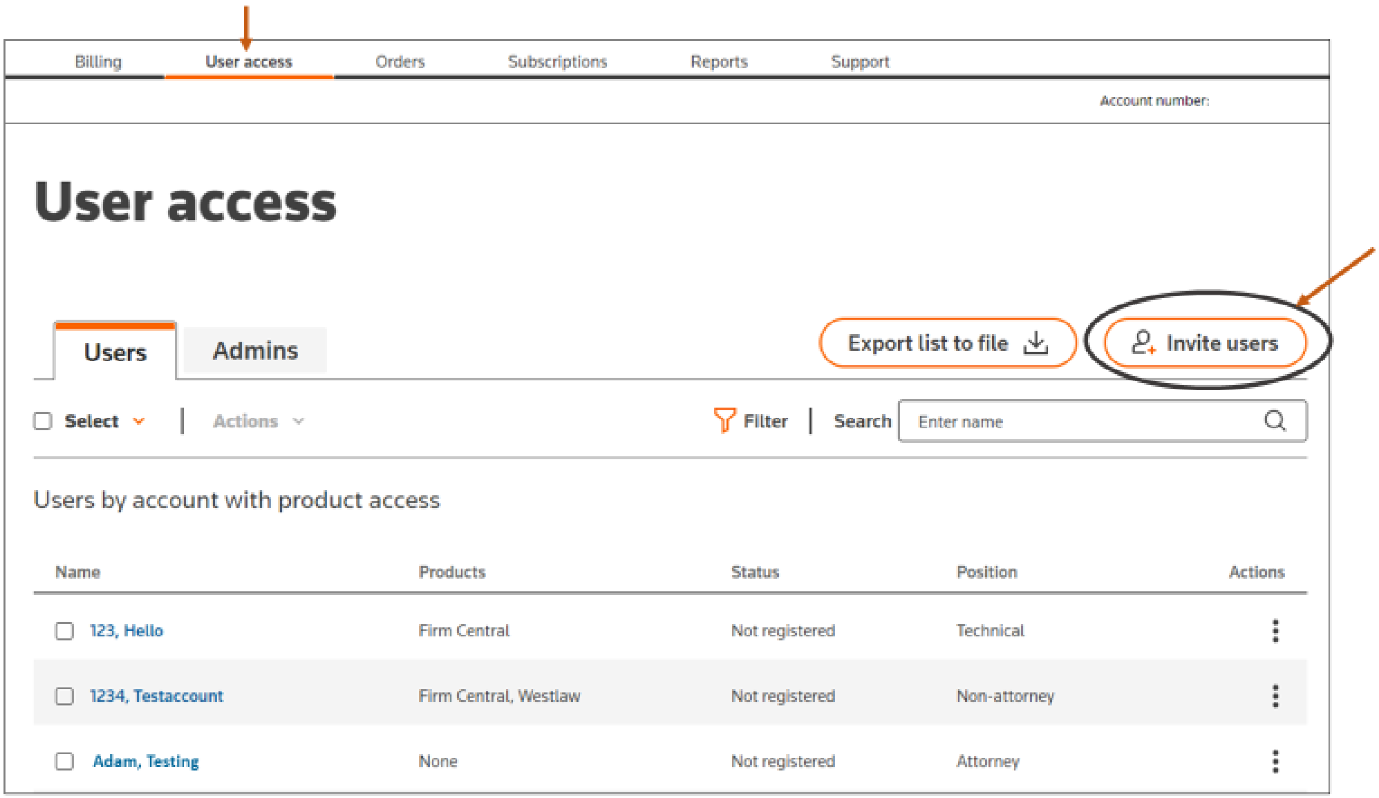


If you navigate back to the **User access** tab, the status for that user will appear as **Updating user**.

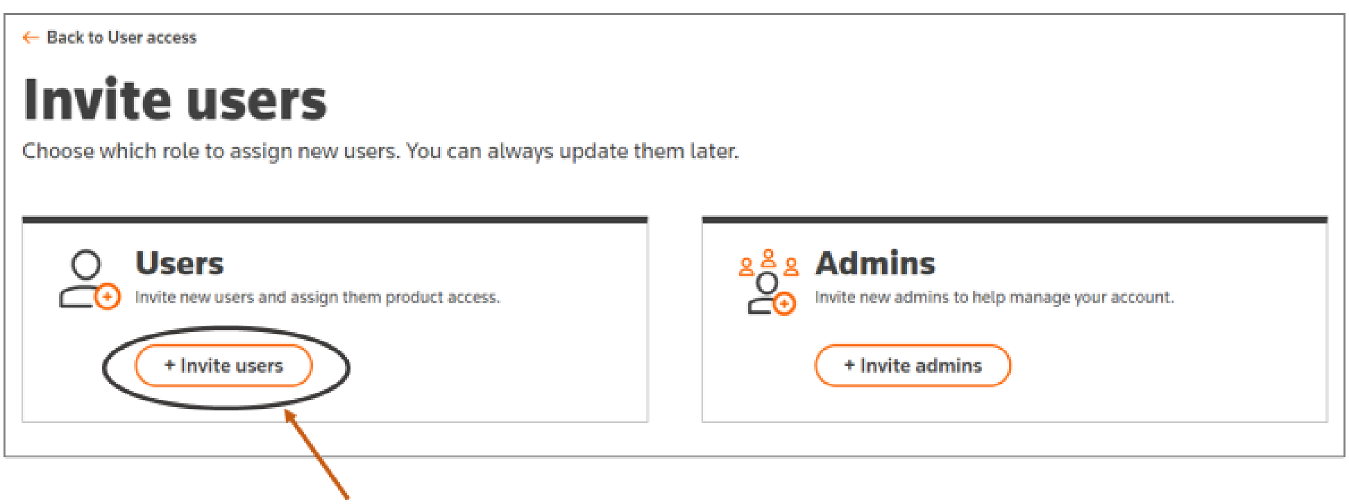


Add Users

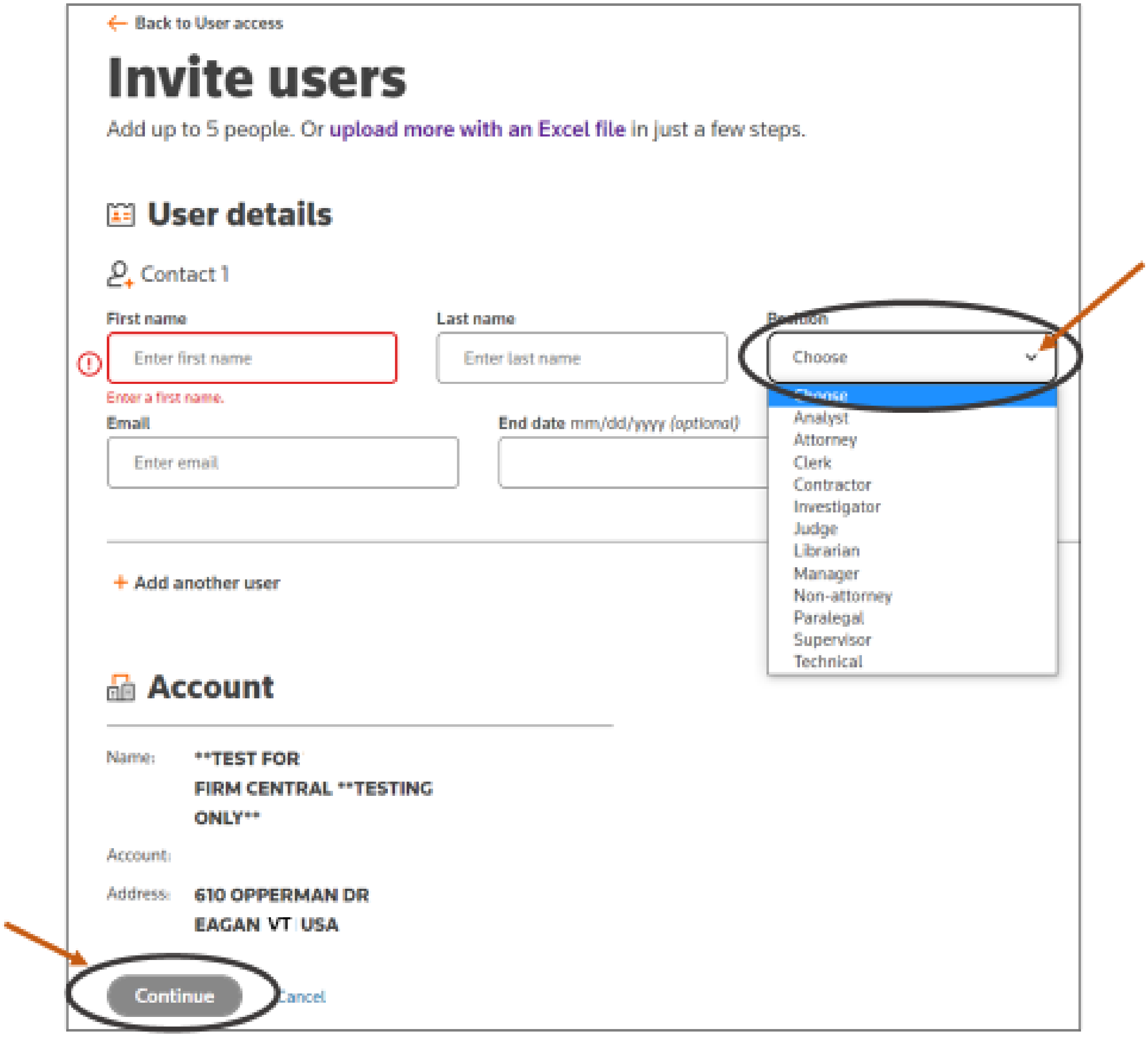
Navigate to the **User access** tab and click **Invite users**.



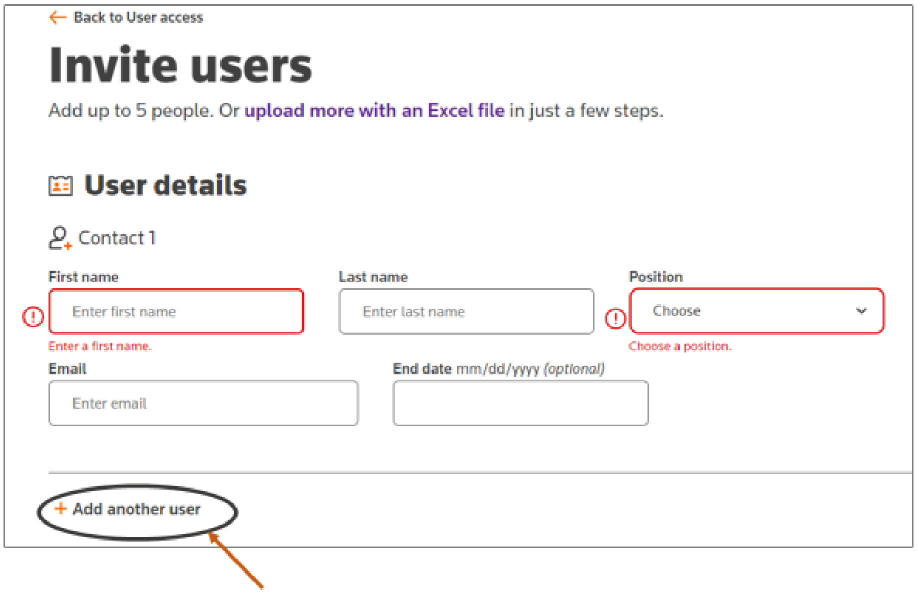
From the Users box on the left, select **+ Invite users**.



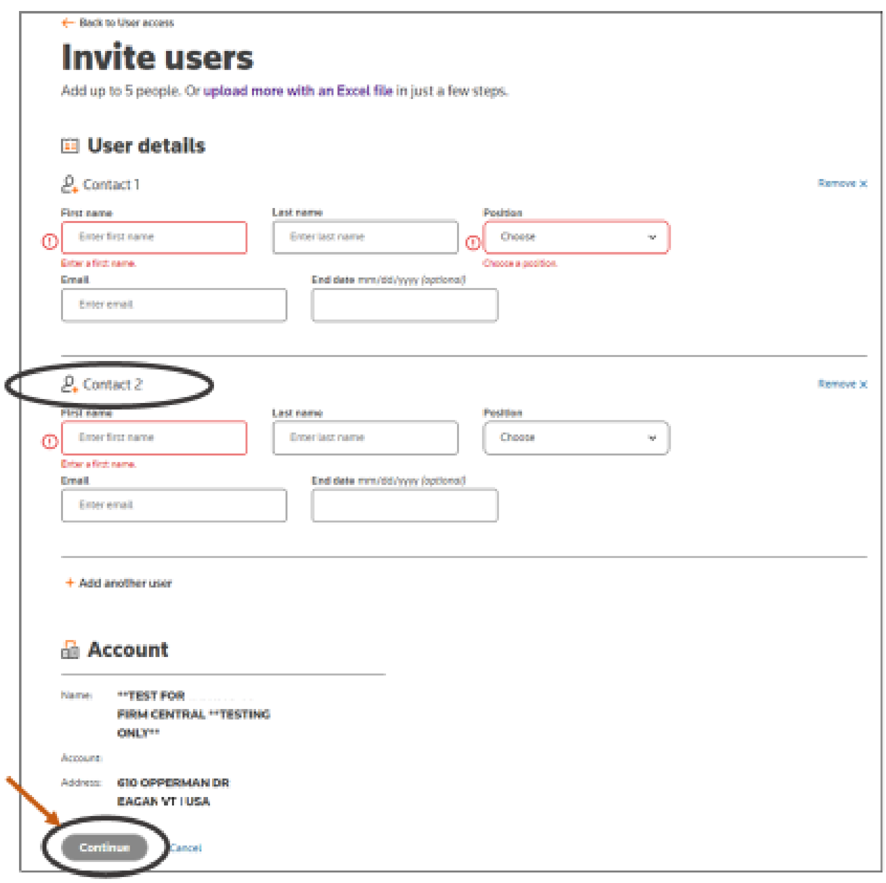
Add a first and last name, email address, and select their position from the dropdown menu. If desired, add an end date for when the user's access will expire. Then, click **Continue** on the bottom left. **Note - Bulk Upload via Excel file will be available in 2024.*



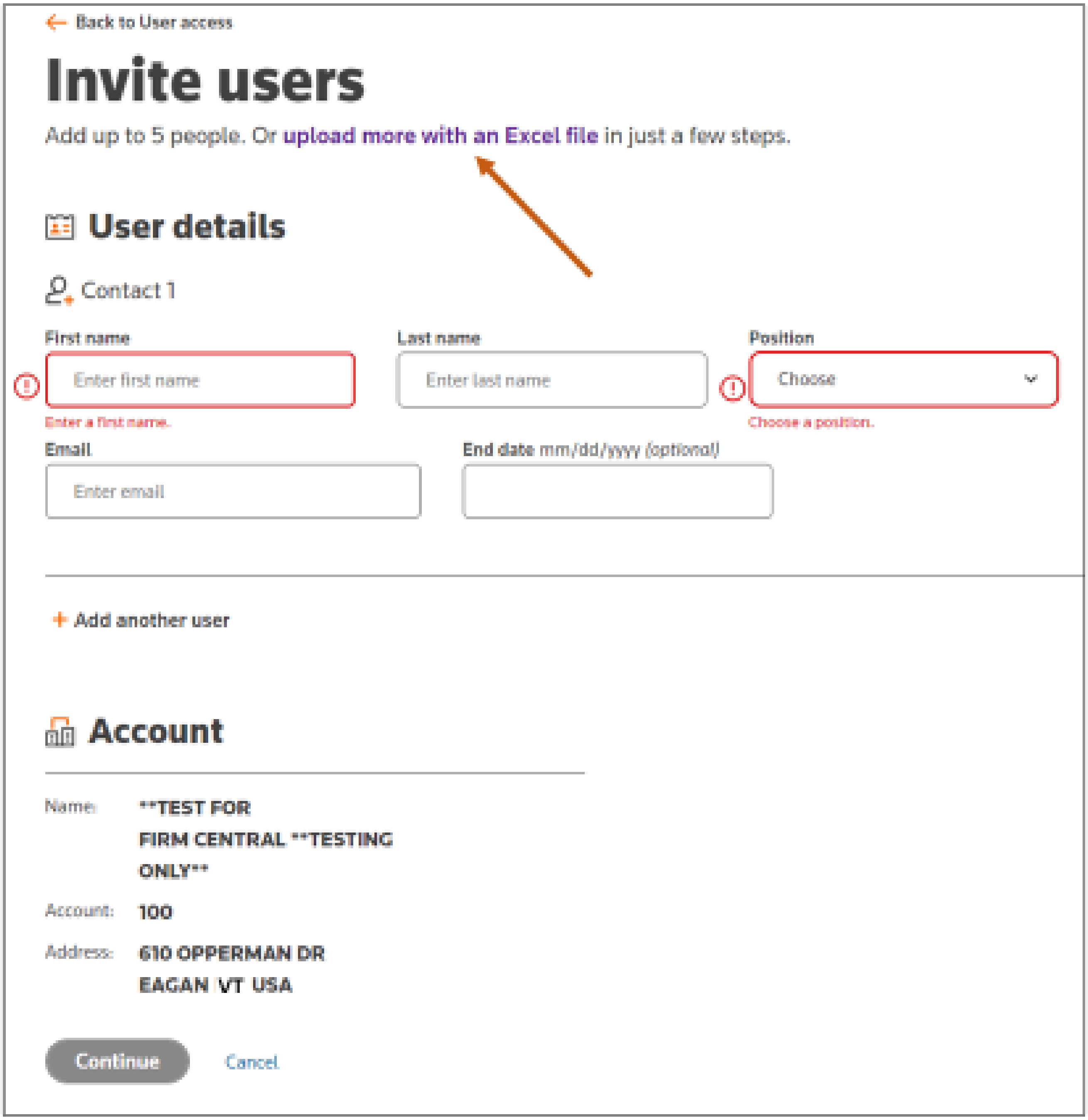
To add an additional user, click **+ Add another user** on the left side.



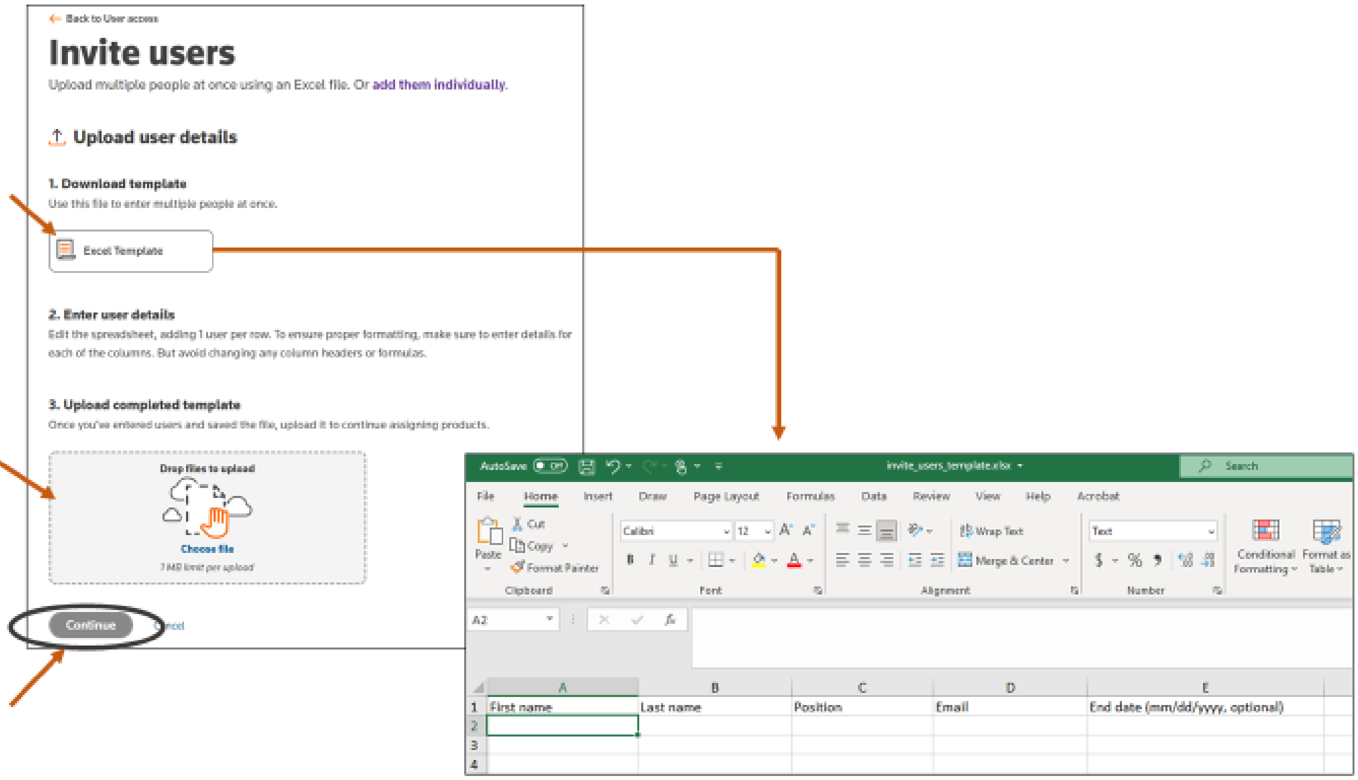
Under **Contact 2**, add a first and last name, email address, and select their position from the dropdown menu. If desired, add an end date for when the user's access will expire. Then, click **Continue**.



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

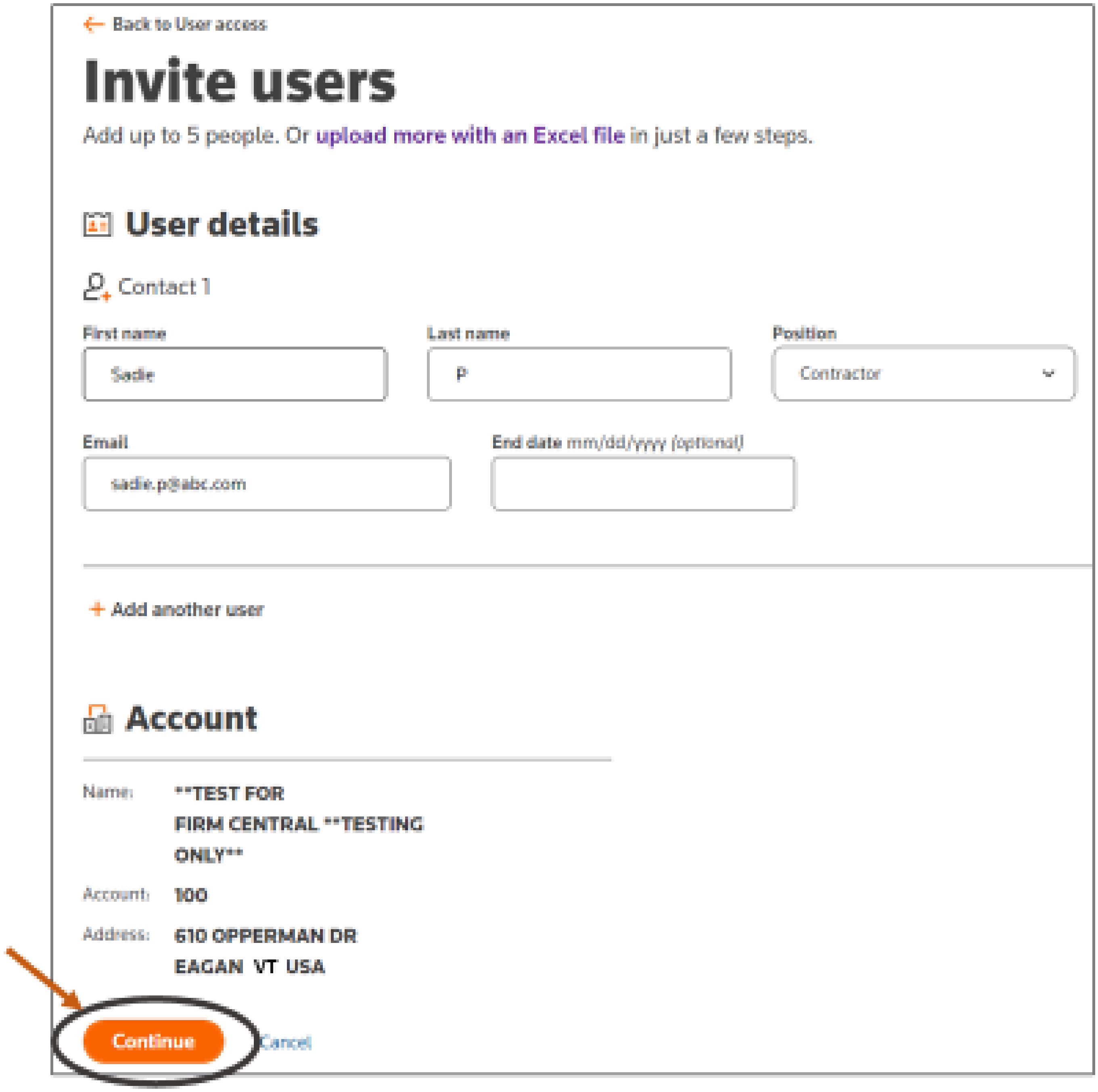


Next, click on the **Excel Template** button. Then, complete the Excel template. Next, upload the completed Excel template. Then, click **Continue**.

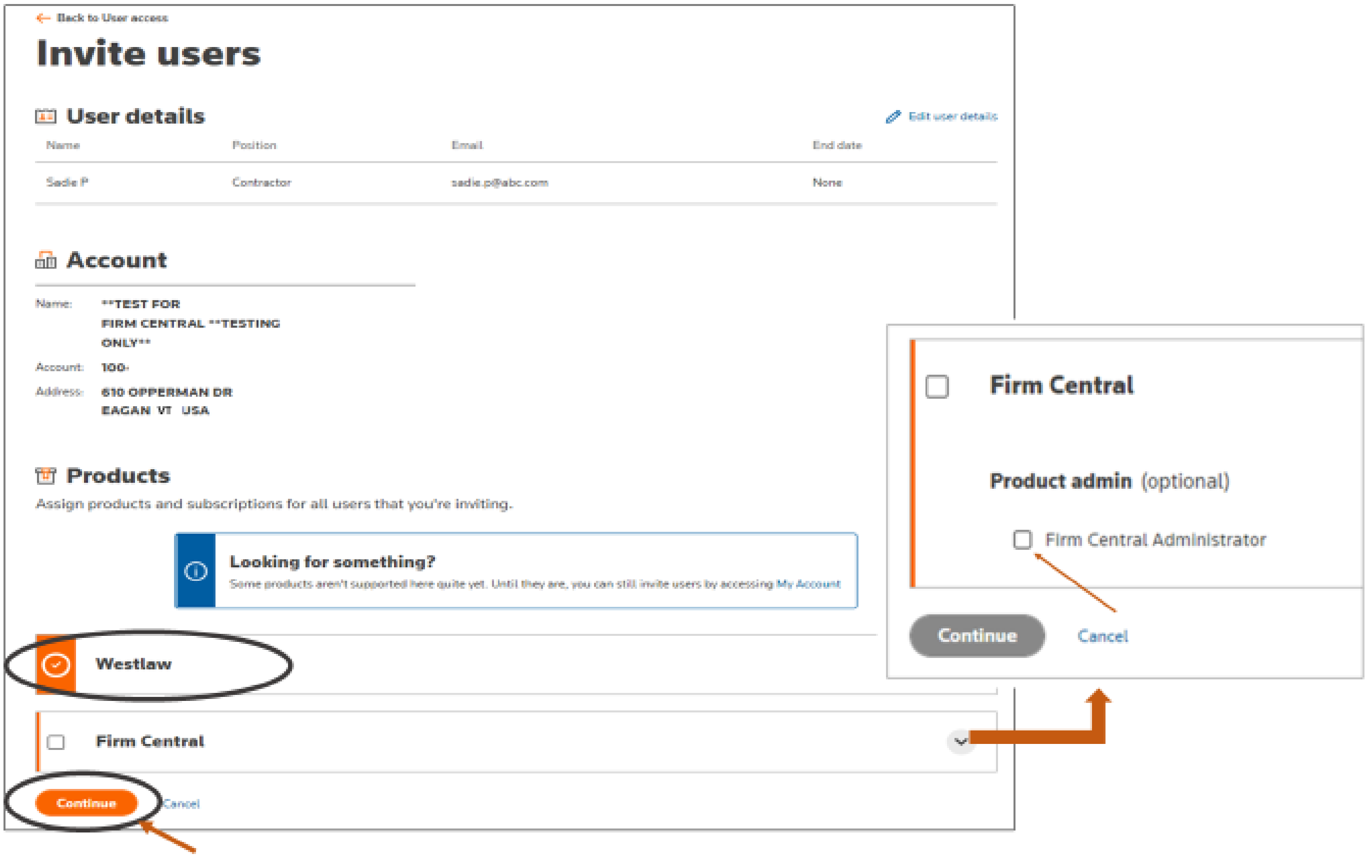


To Edit user details, click **Edit user details**.

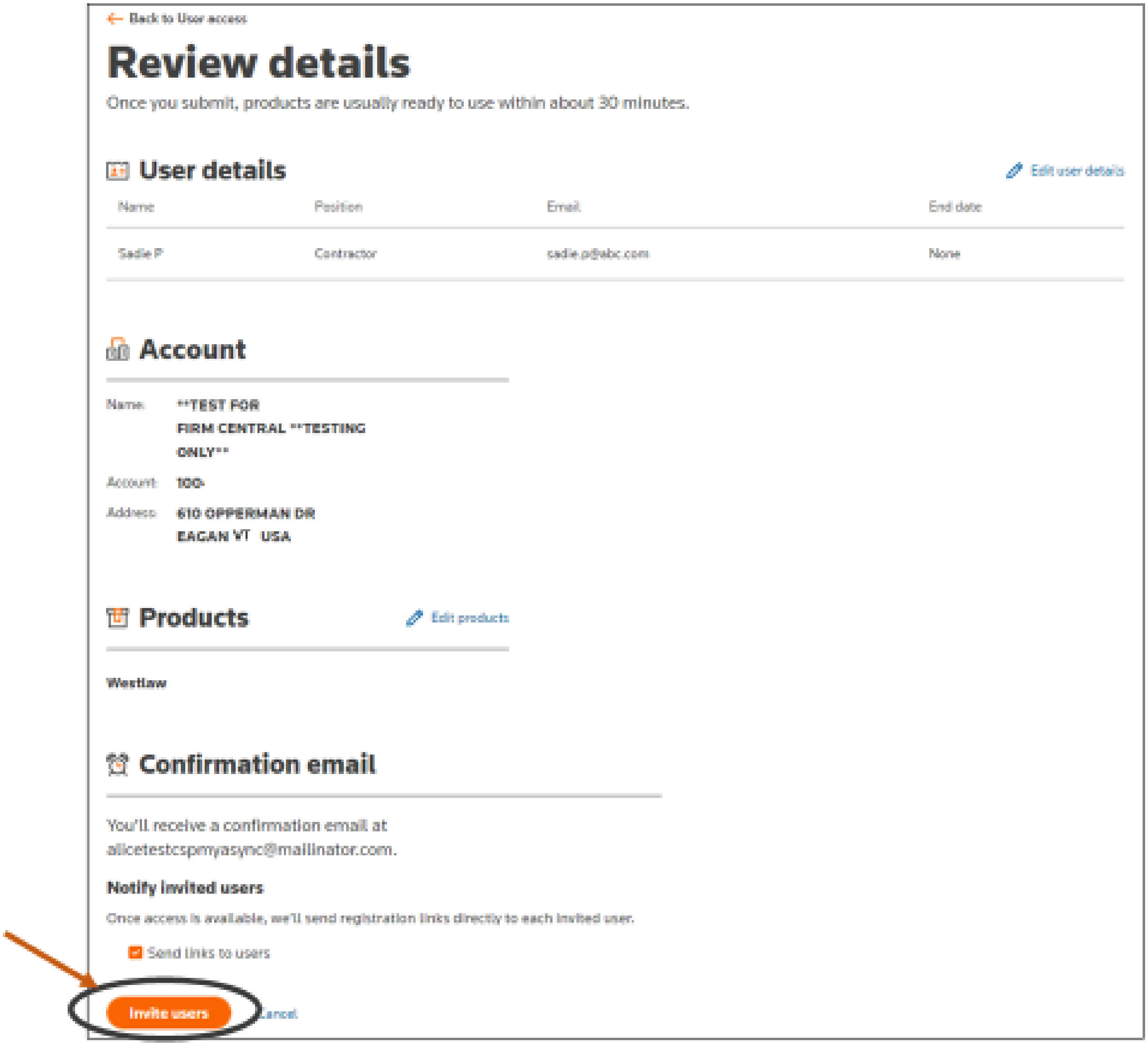
Next, make any desired changes. Then, click **Continue.**



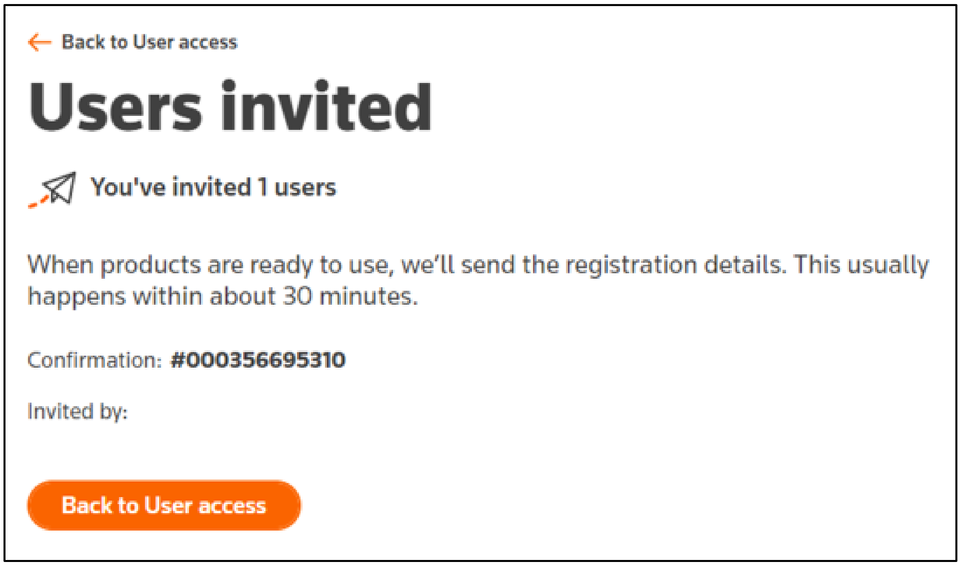
Select the desired product(s) to which you want to grant access. If assigning **Firm Central**, select whether to grant **Firm Central Administrator** access. Then, click **Continue**.



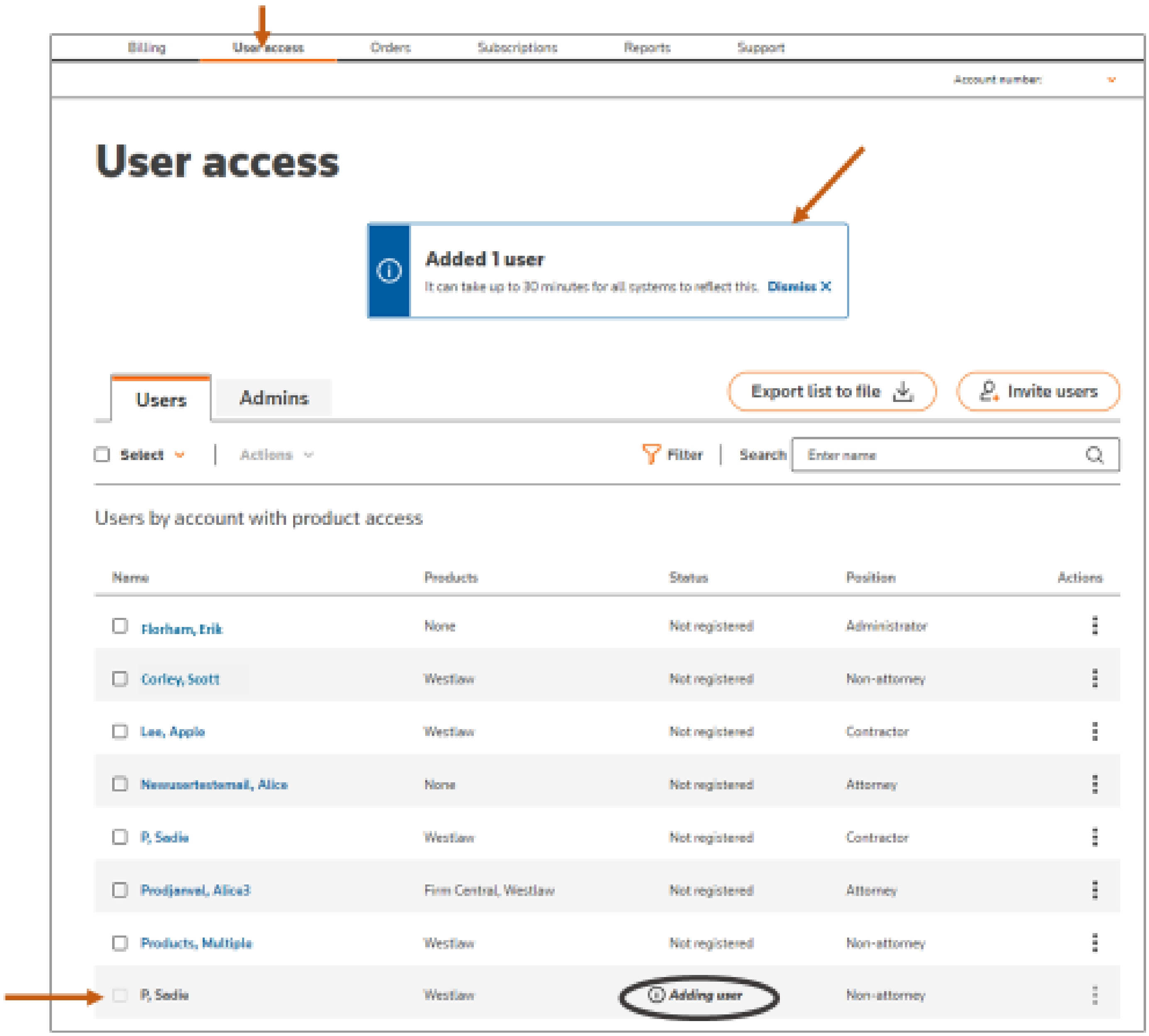
Then, click **Invite users**.



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



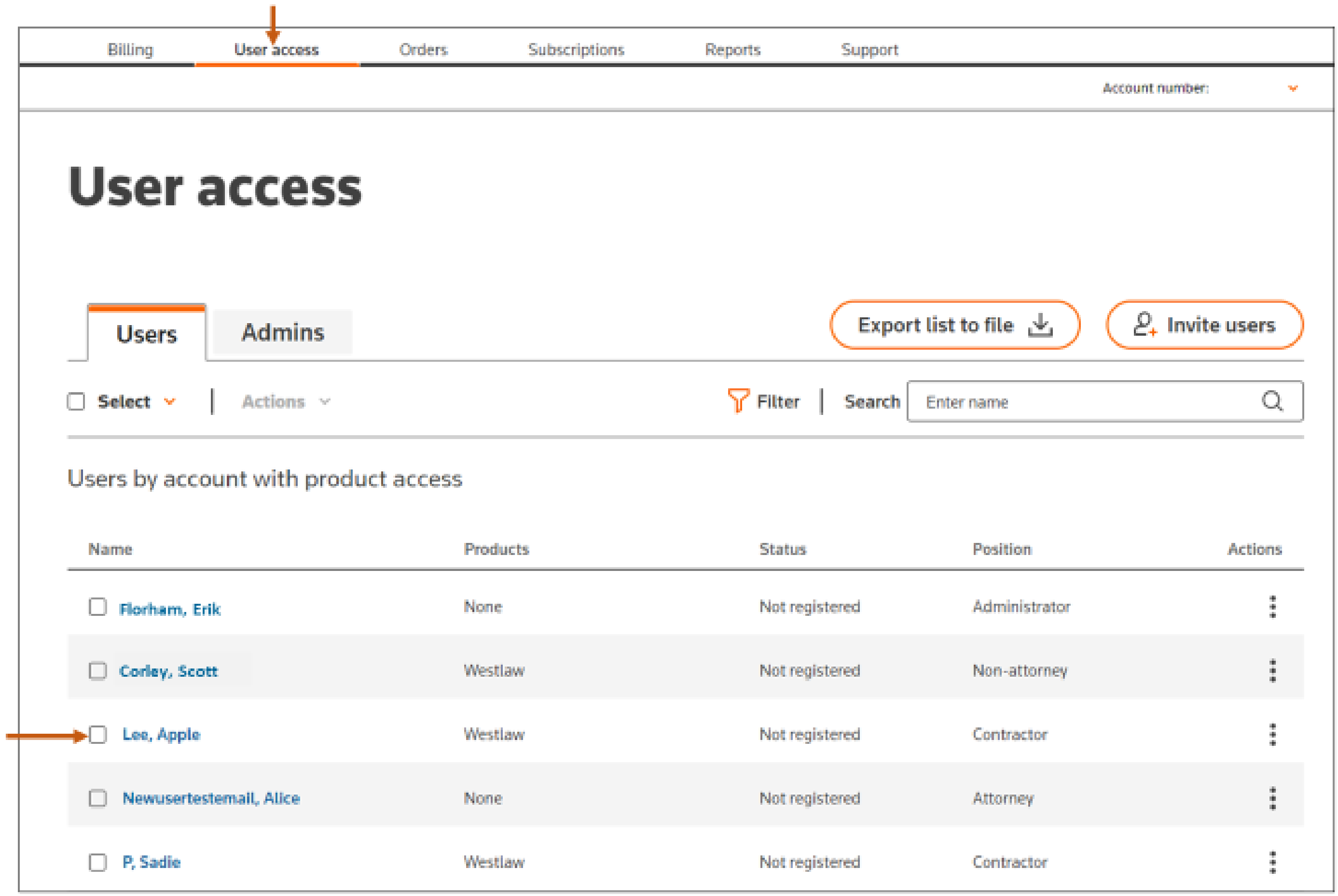
If you navigate back to the **User access** tab, you will see a blue box notification that a new user was added. Also, you can see the new user listed under the **Users** tab. Note, the status will appear as **Adding user** until the system completes the update.



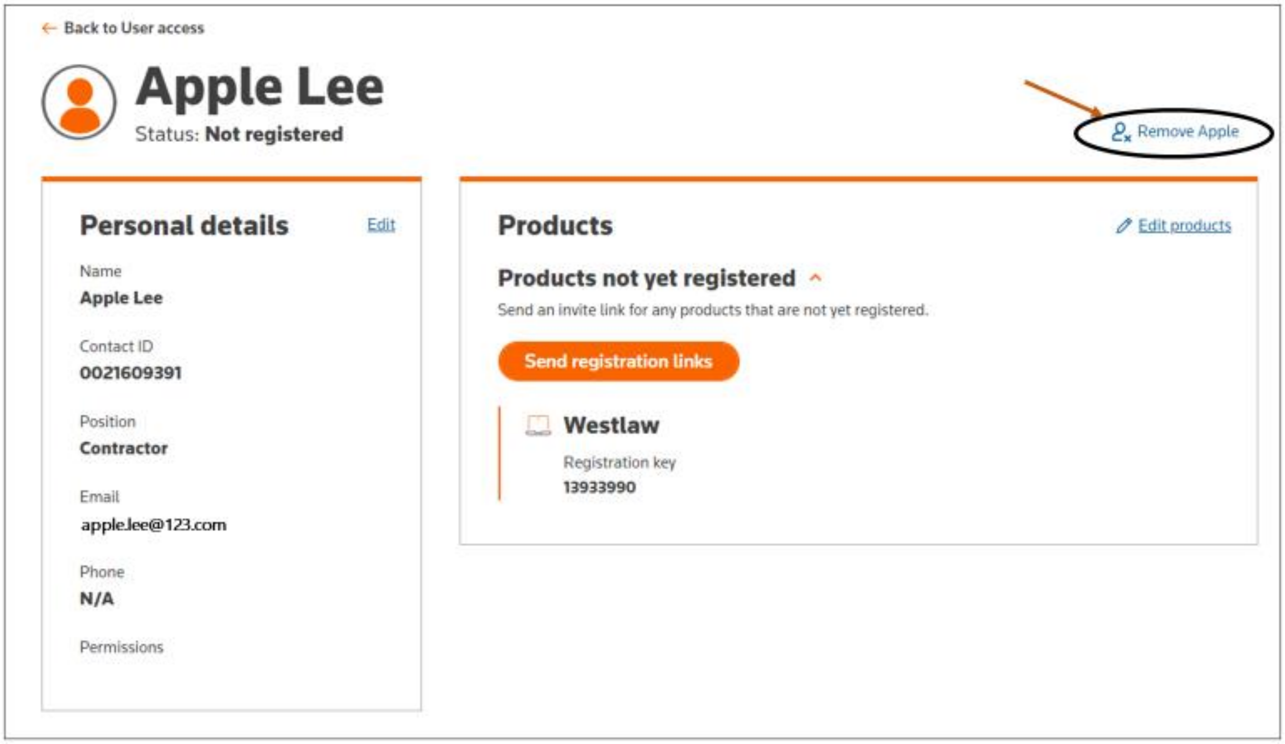
Remove Users

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

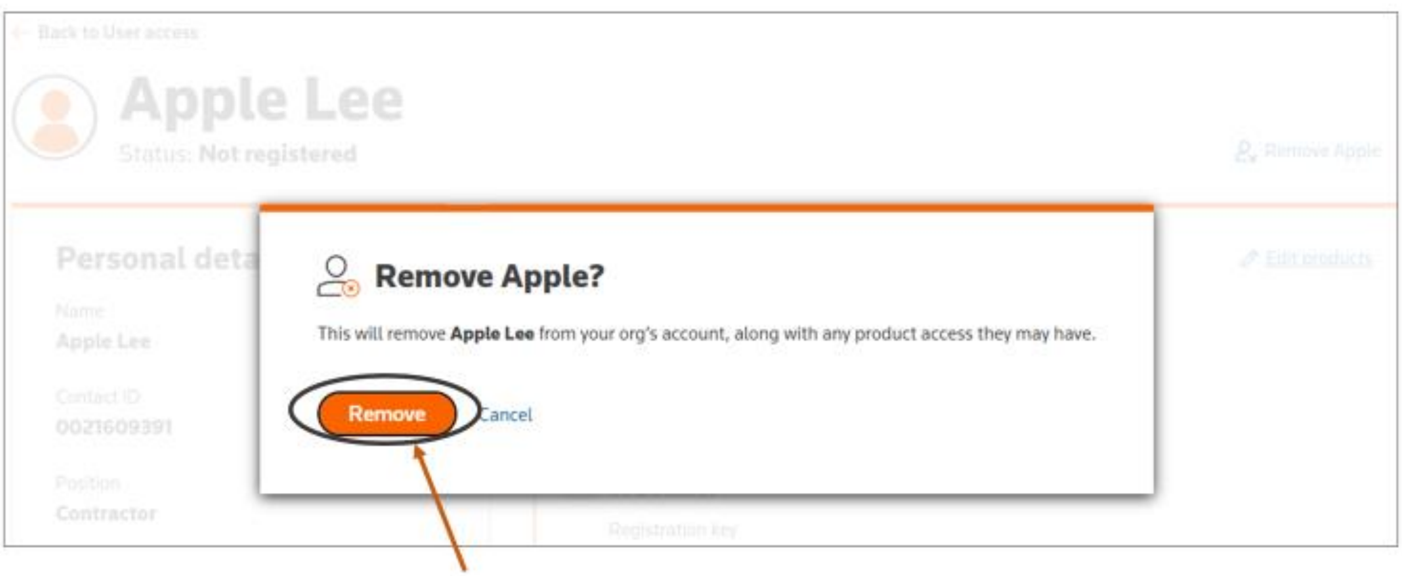
1) Navigate to the **User access** tab and click on the user that you want to remove.



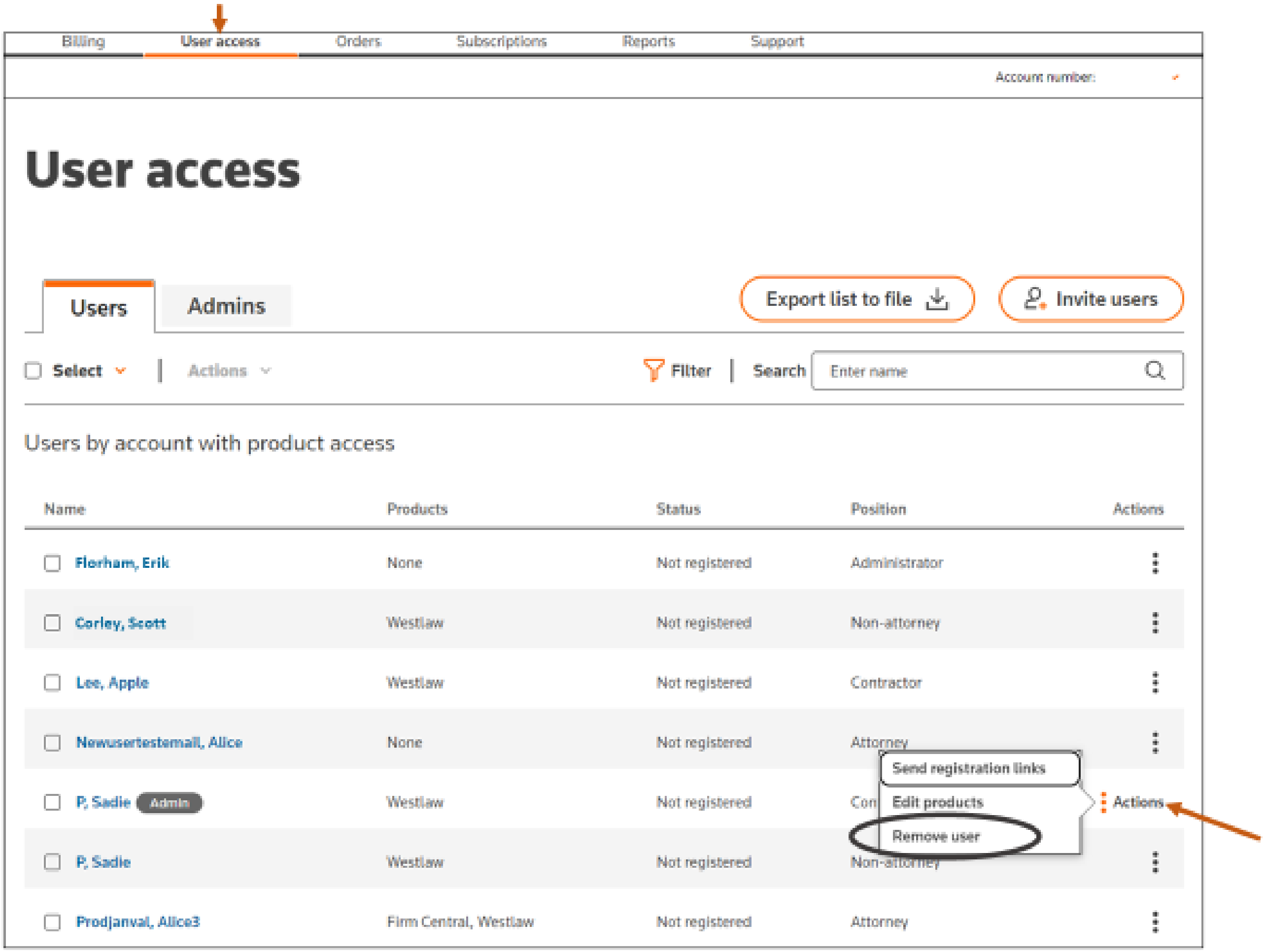
Next, click **Remove [user's name]** on the right side.



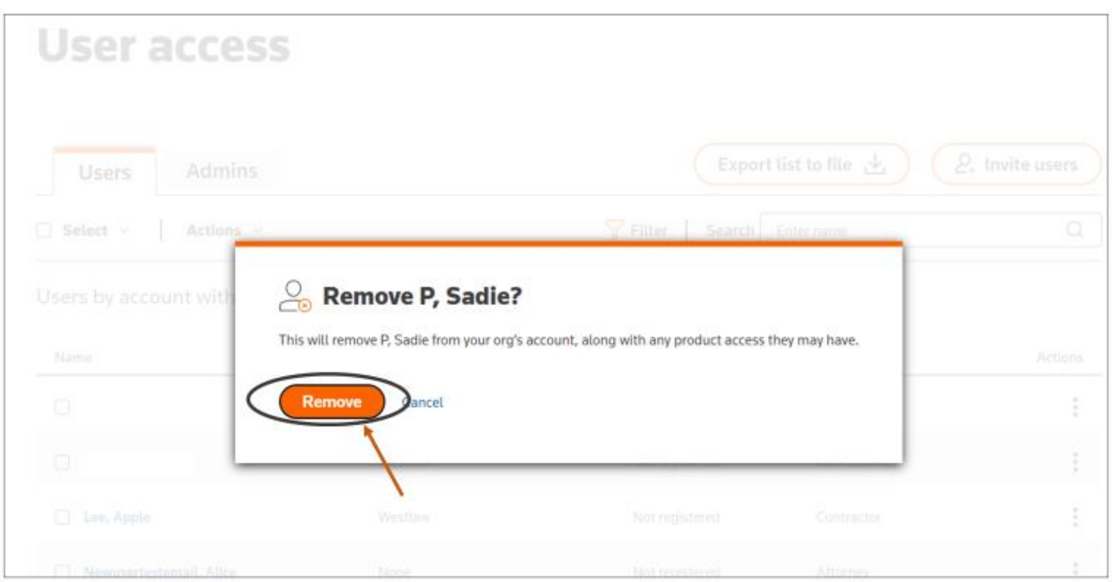
Then, click **Remove**.



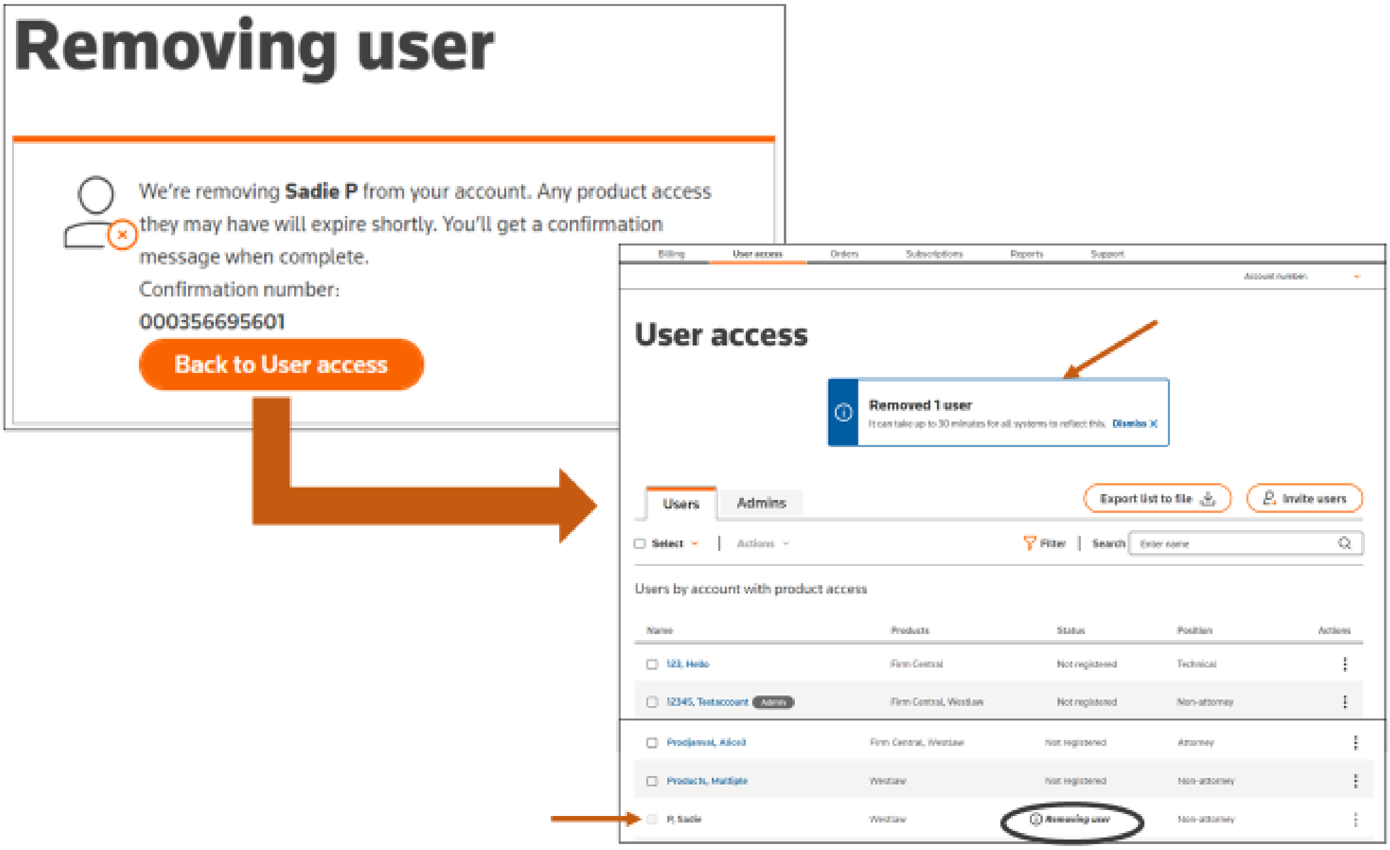
2) Navigate to the **User access** tab. Click on the three dots under the **Actions** tab for the user you want to remove. Then, select **Remove user**.



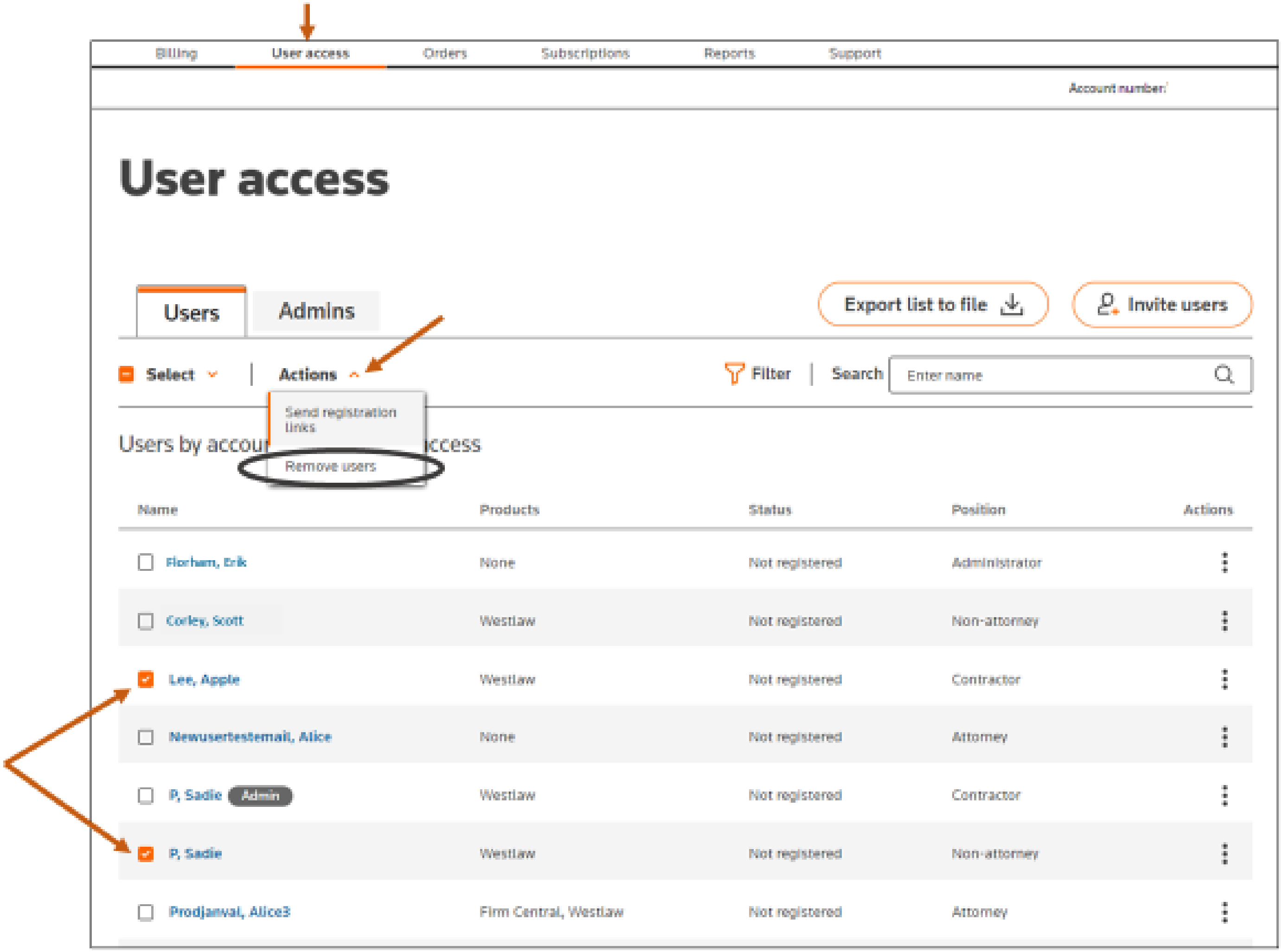
Then, click **Remove**.



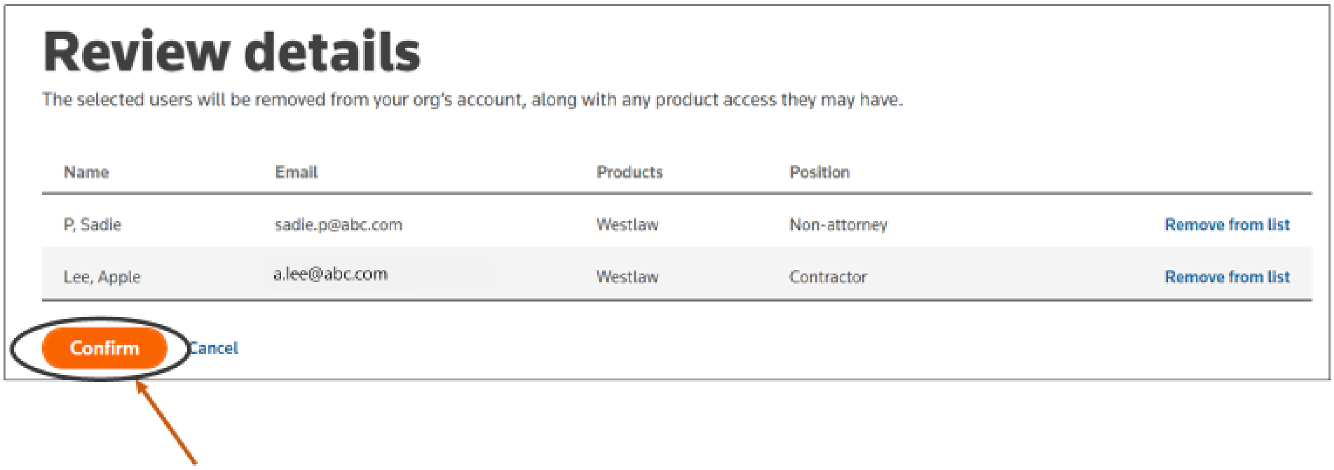
After clicking Remove, you will receive a confirmation similar to the one below. Then, if you click **Back to User access,** you will see a blue box similar to the one below stating that a user was removed.



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**.



Next, click **Confirm**.



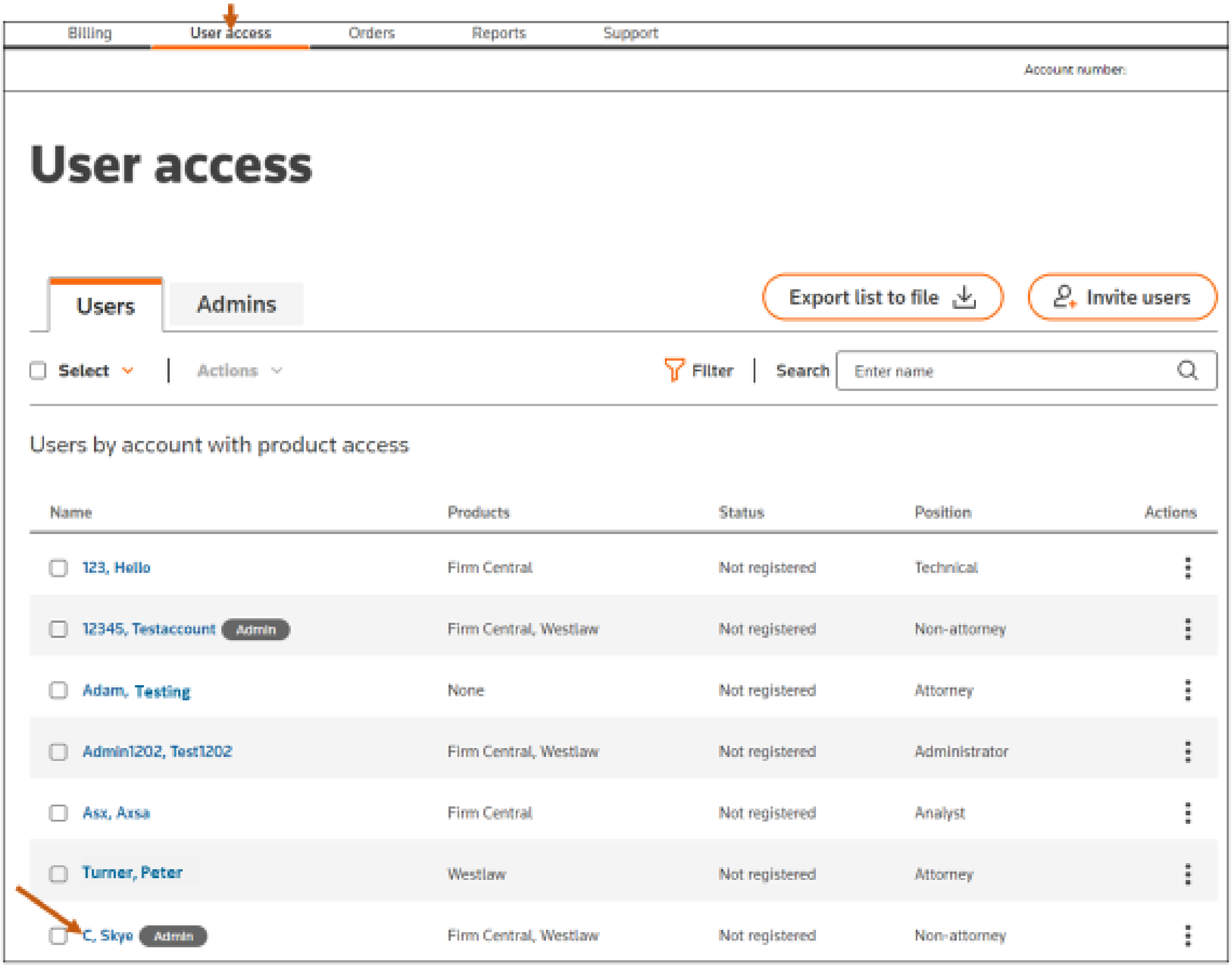
If you do not want to remove one of the listed users, click **Remove from list**.

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

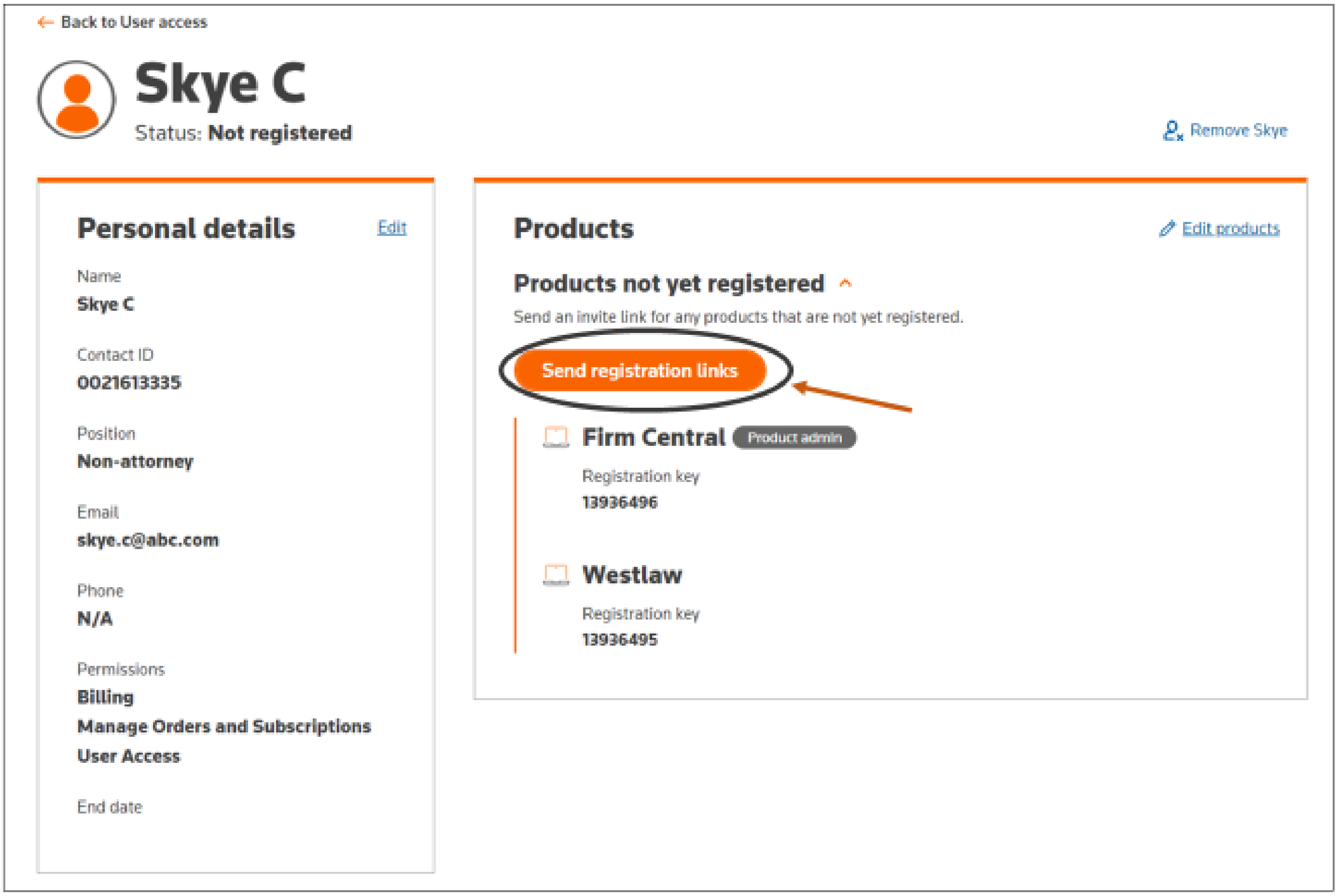
Send/Resend Product Registration Links

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

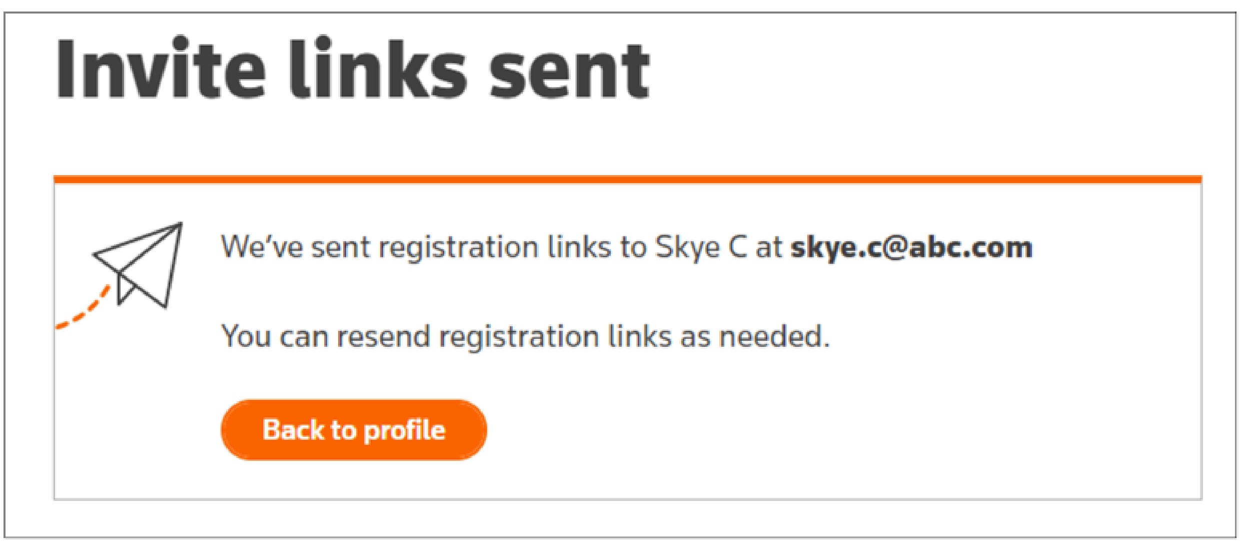
1) Navigate to the **User access** tab and click the user to whom you want to send a product registration link.



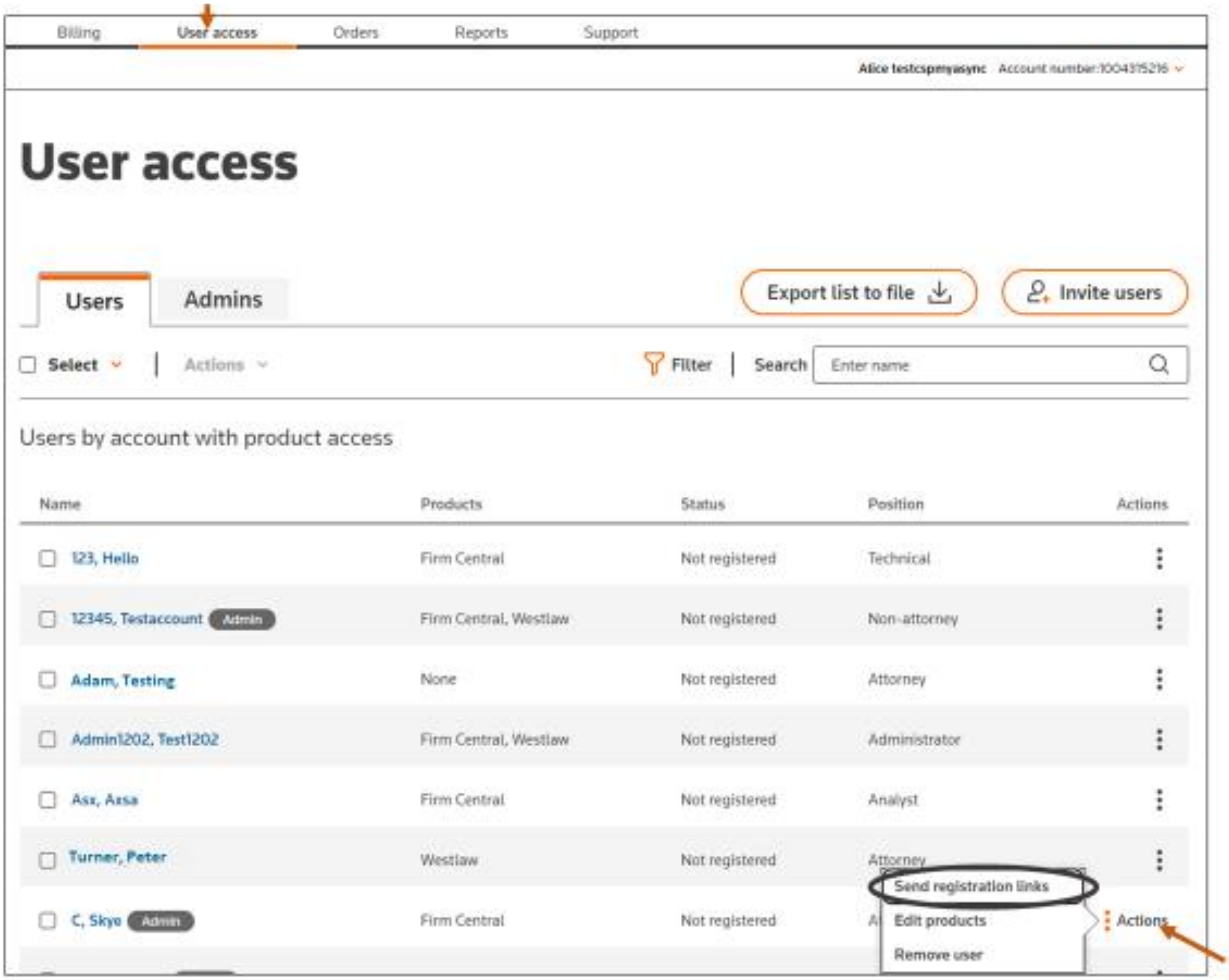
Next, click **Send registration links** from the **Products** box.



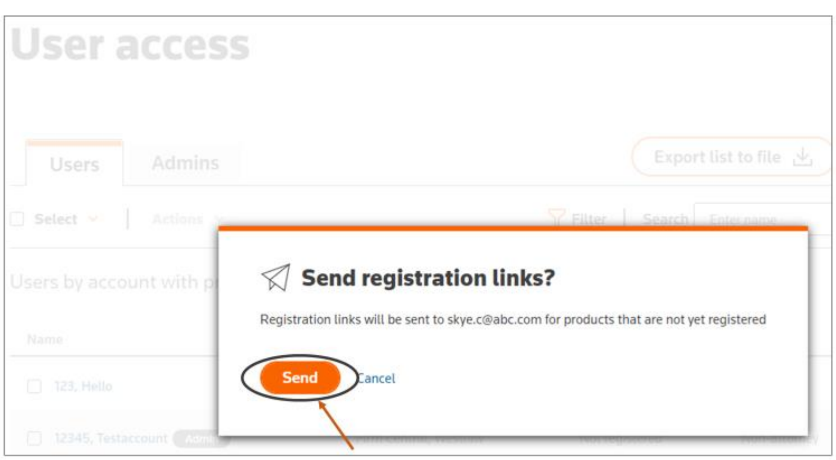
After clicking the Send registration links, you will receive a confirmation similar to the one below.



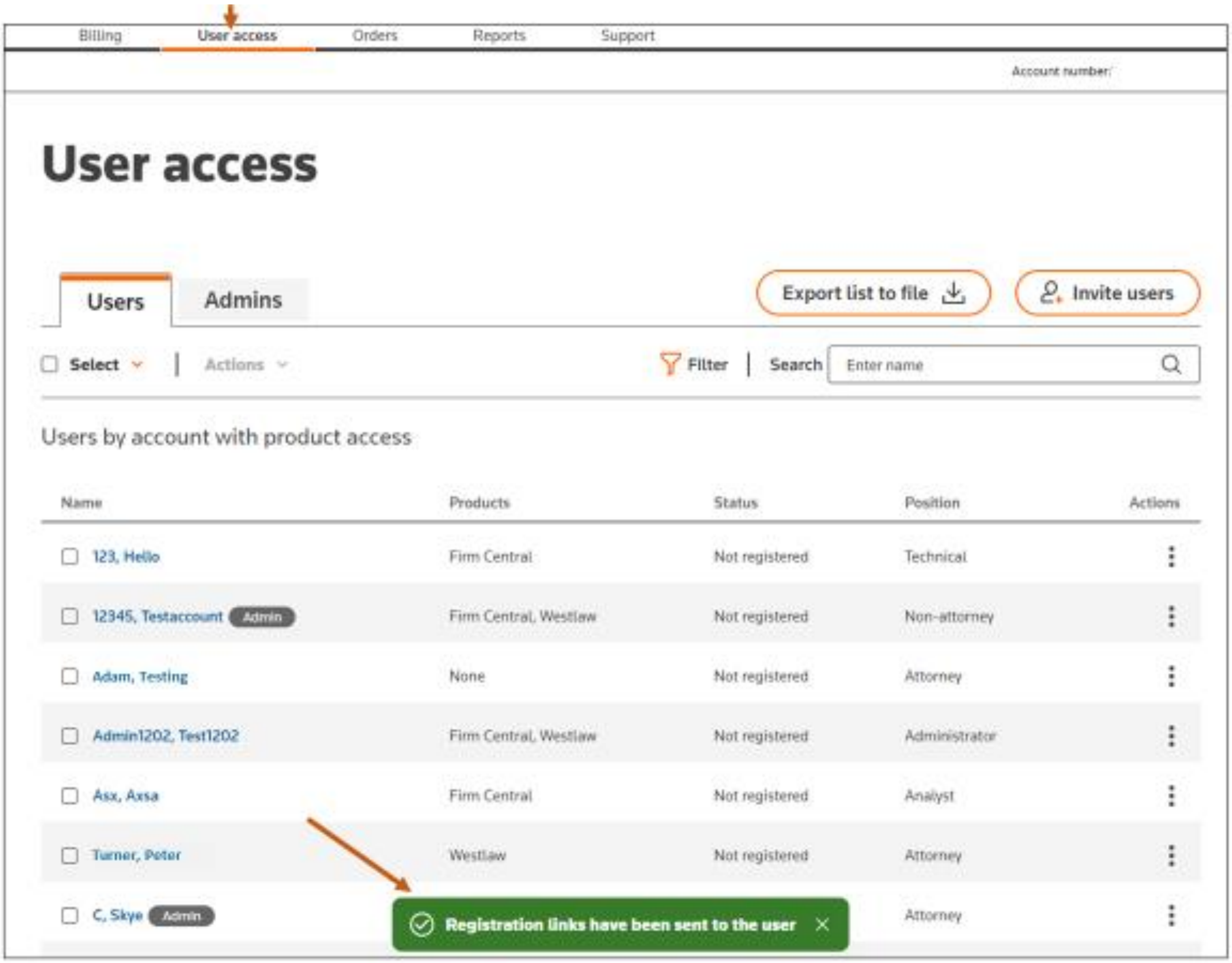
2) Navigate to the **User access** tab. Click on the three dots under the **Actions** tab for the user whose product access you want to change. Then, select **Send registration links**.



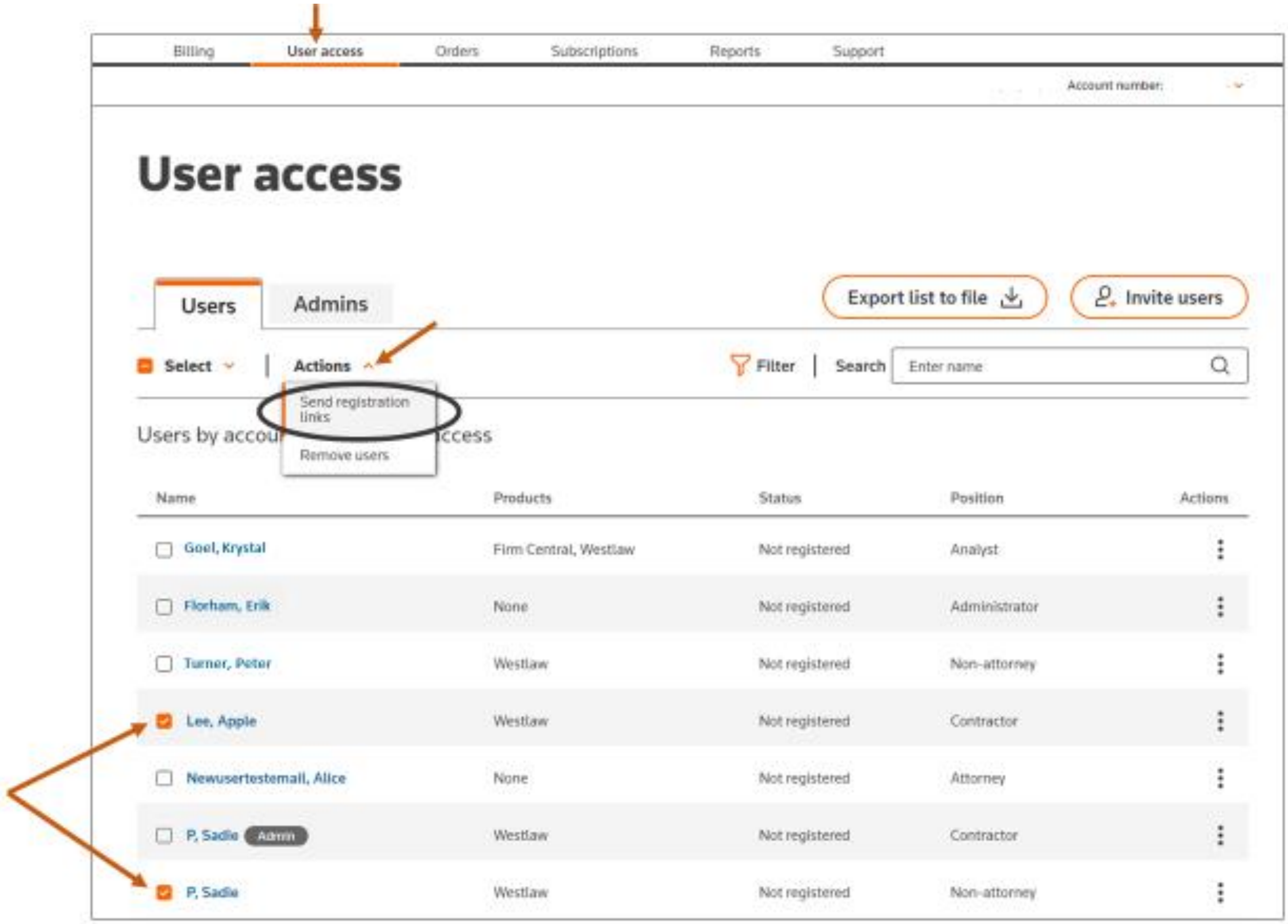
Next, click **Send**.



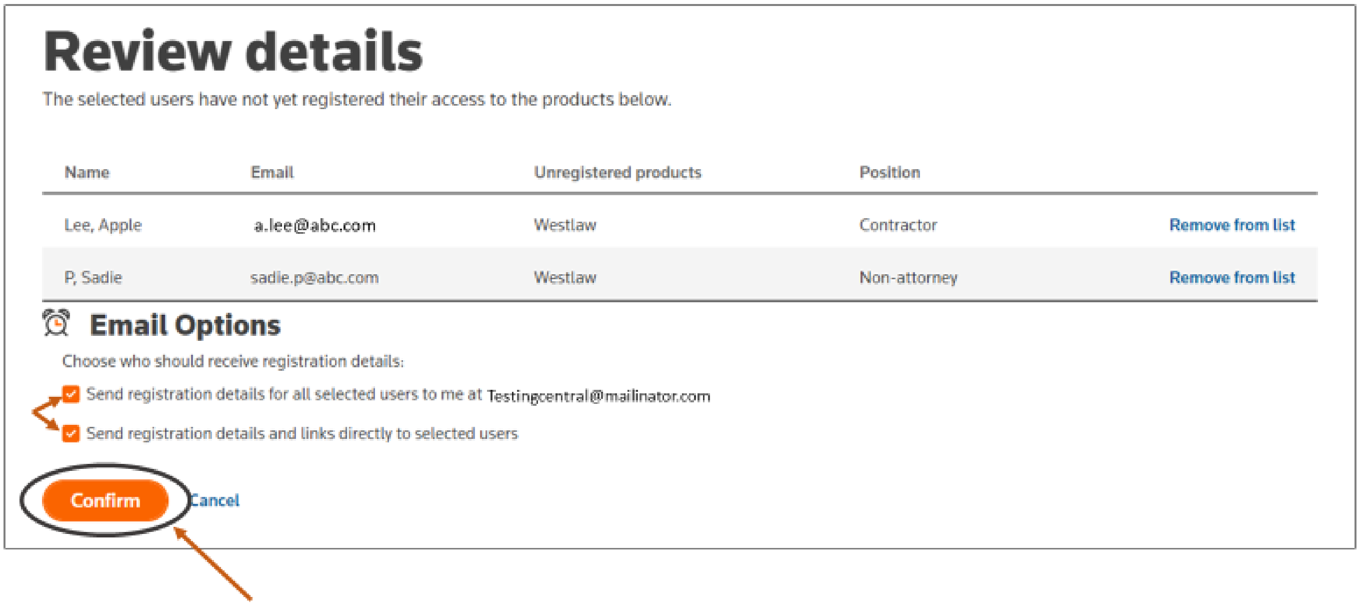
After clicking send, you will see a green box similar to the one below stating that registration links were sent.



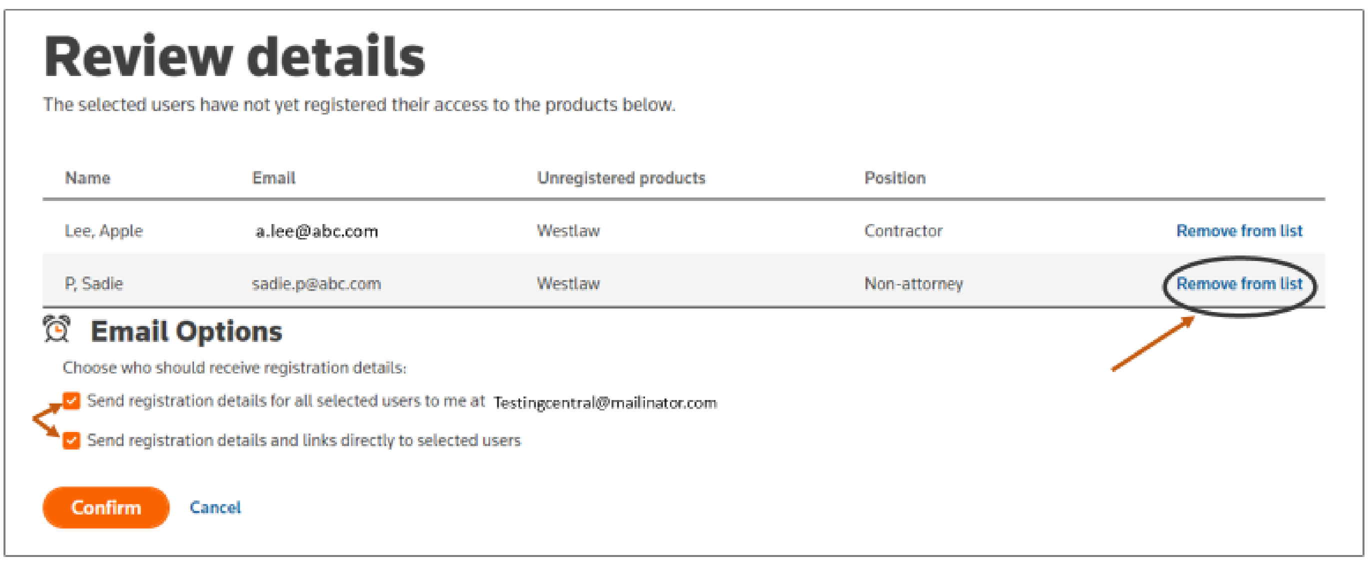
3) Navigate to the **User access** tab. Select the users to whom you want to send the registration links. Next, click the **Actions** carrot. Then, click **Send registration links**.



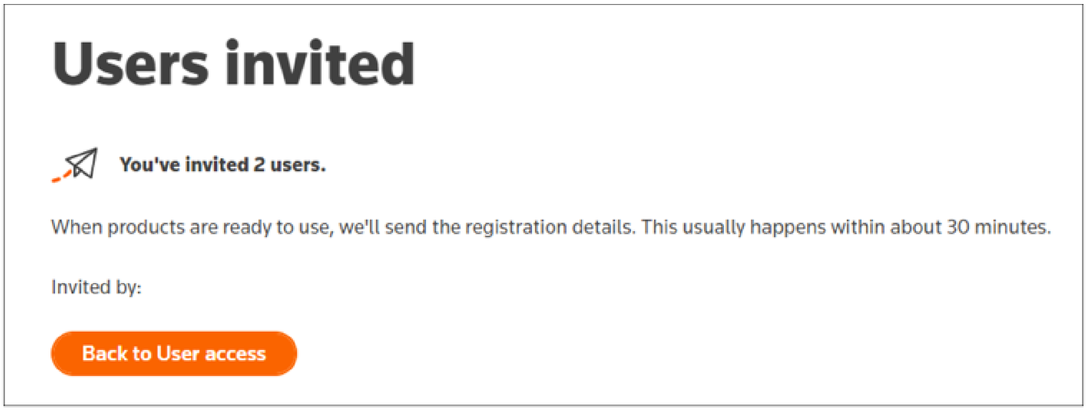
Next, select whether to send registration details to you, to the selected users or to both you and the users. Then, click **Confirm**.



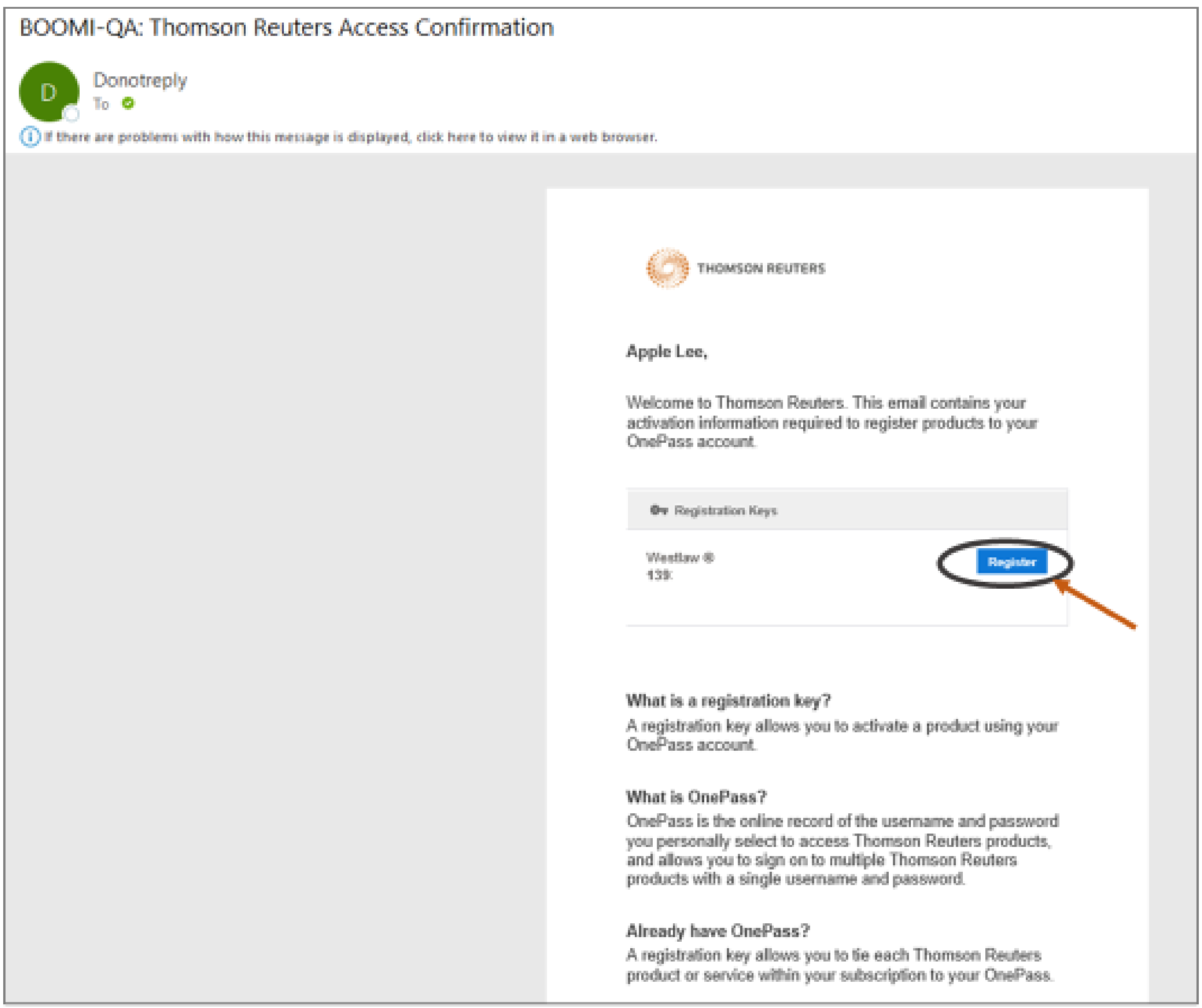
If an incorrect user is listed in the Review details list, click on **Remove from list** to the right of the user.



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



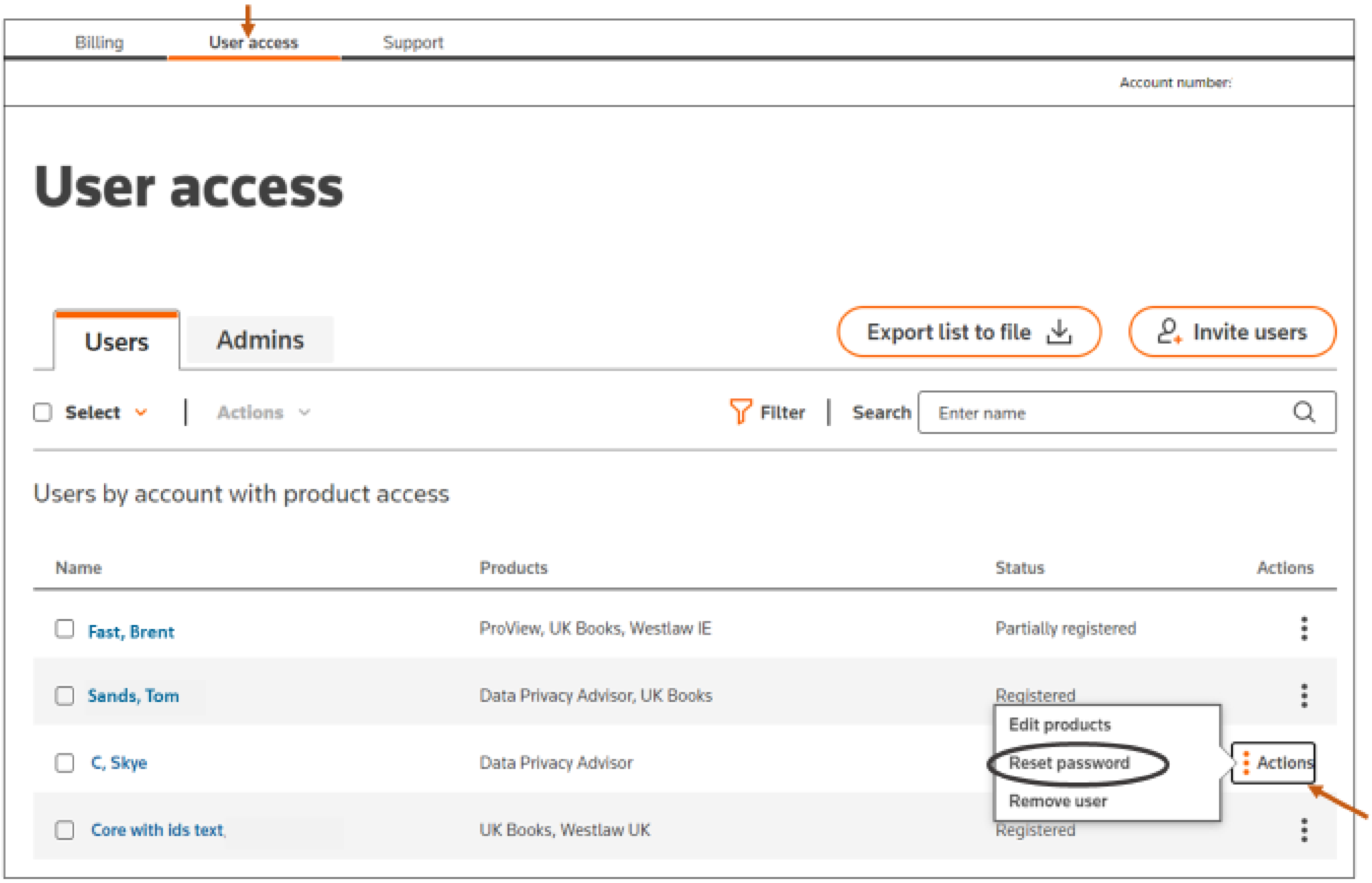
The user(s) to whom you sent registration links will receive an email (usually within 30 minutes) similar to the one below. To complete registration, the user must click on **Register** in the email.



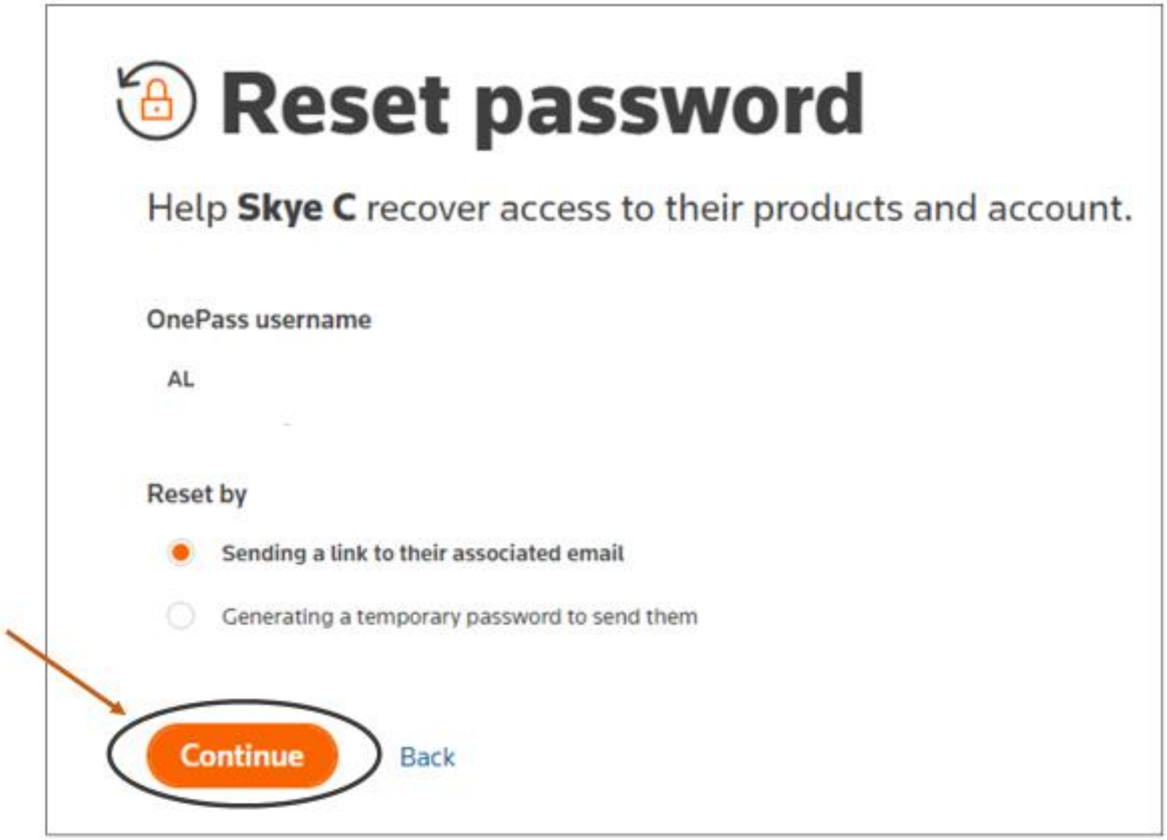
Reset Password for a User

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

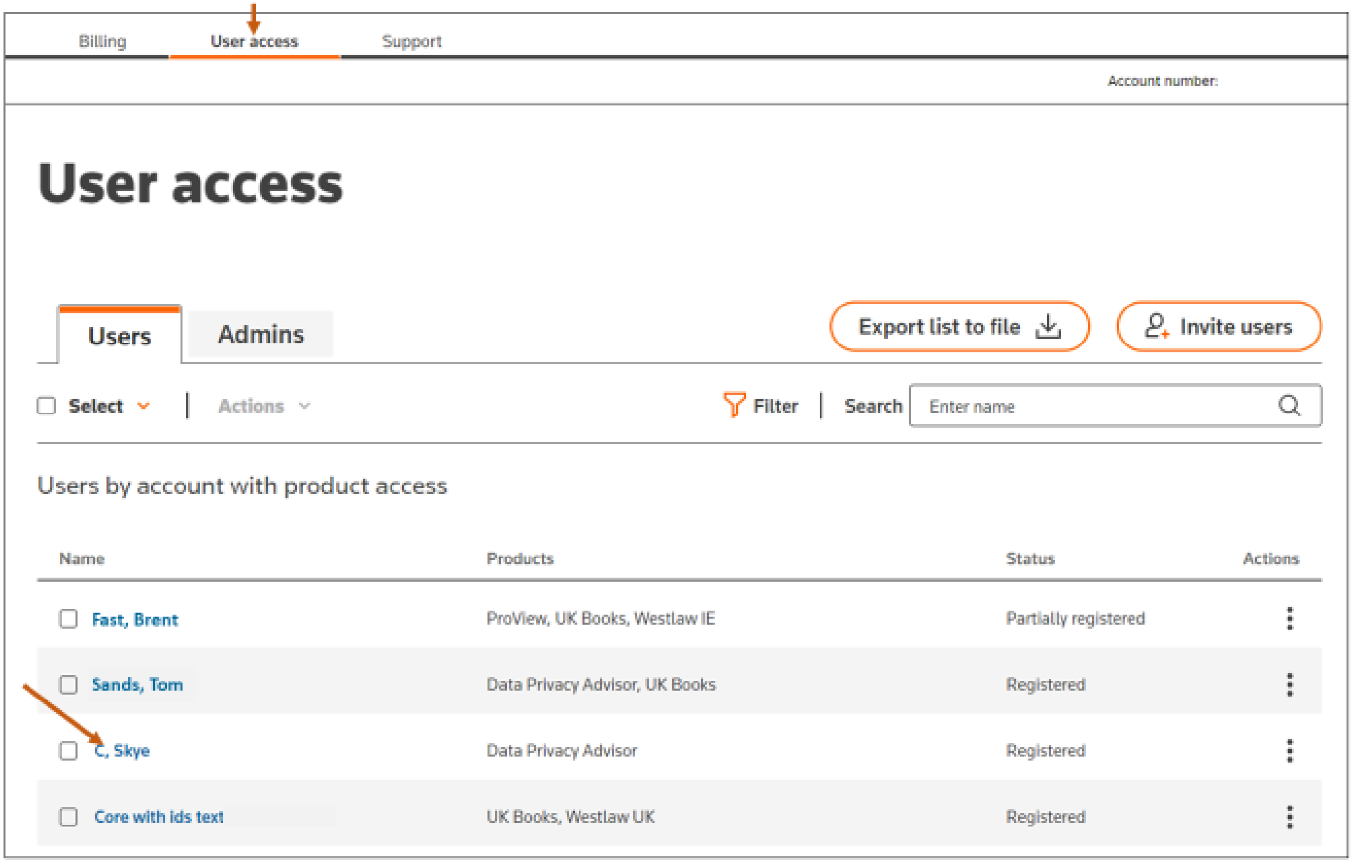
1) Navigate to the **User access** tab. Click on the three dots under the **Actions** tab for the user whose product access you want to change. Then, select **Reset password**.



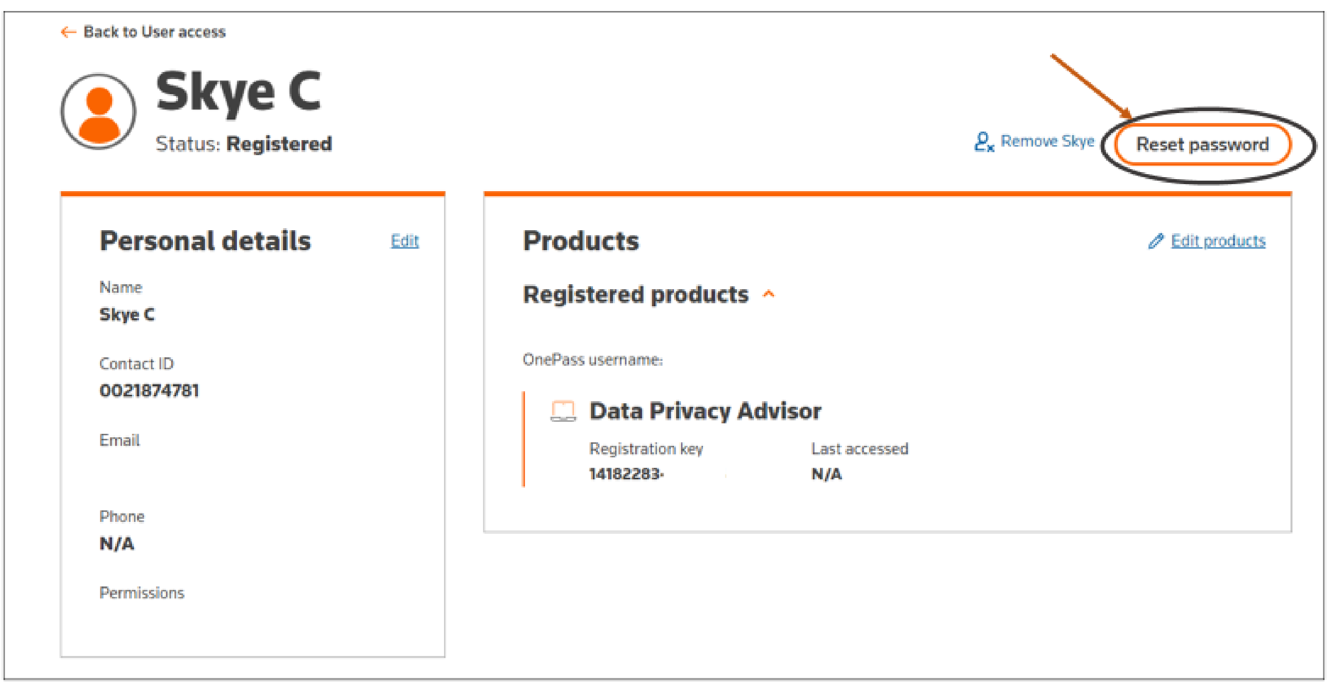
Next, select whether to send a link to the user's associated email address or to generate a temporary password to send to the user. Then, click **Continue**.



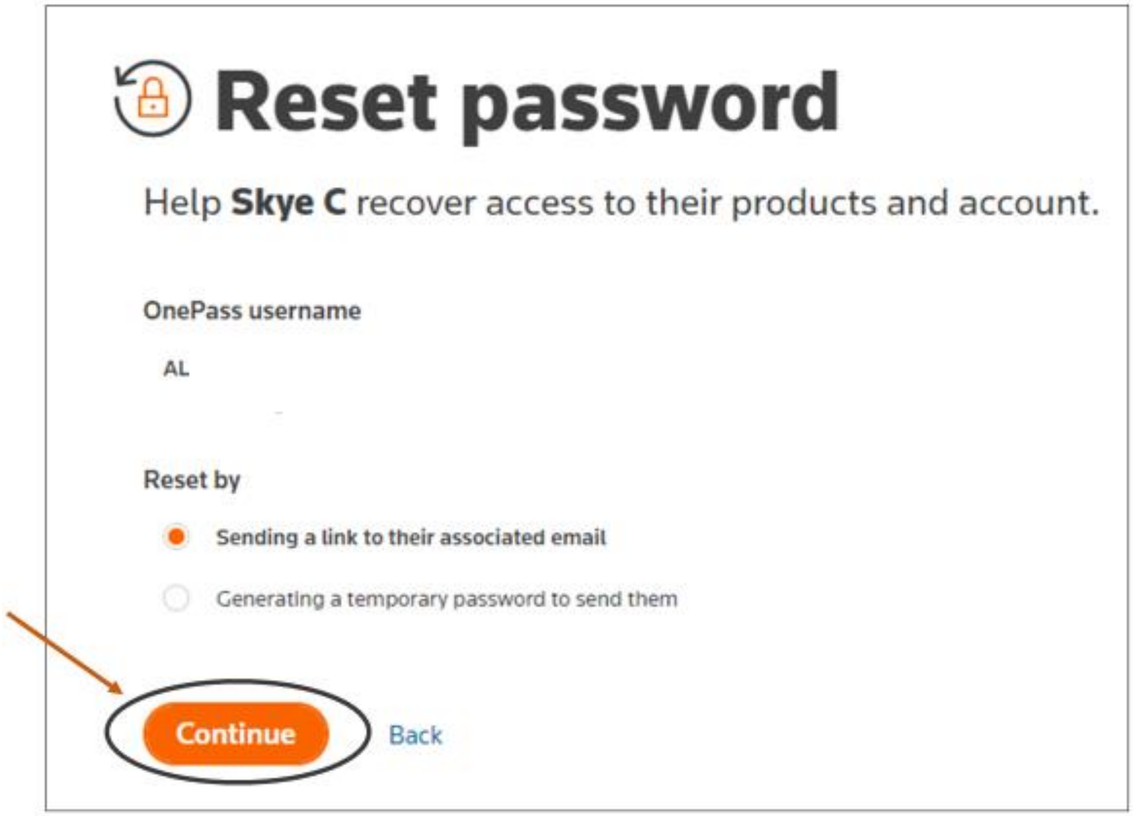
2) Navigate to the User access tab and click on the user's name.



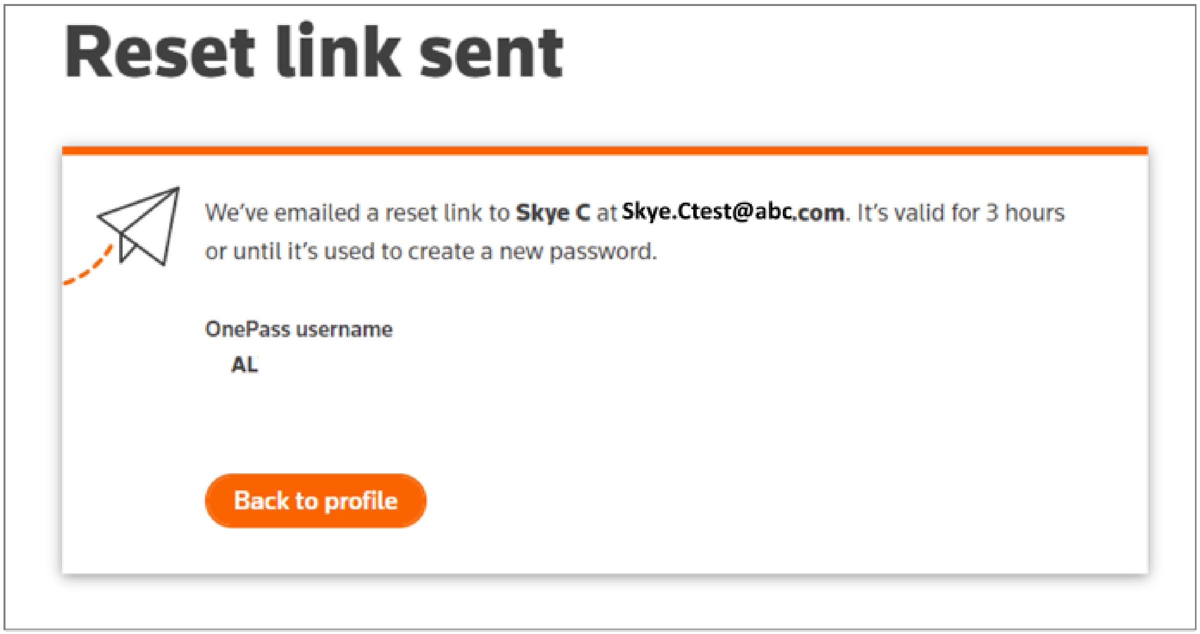
Next, click Reset password on the right side.



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**.



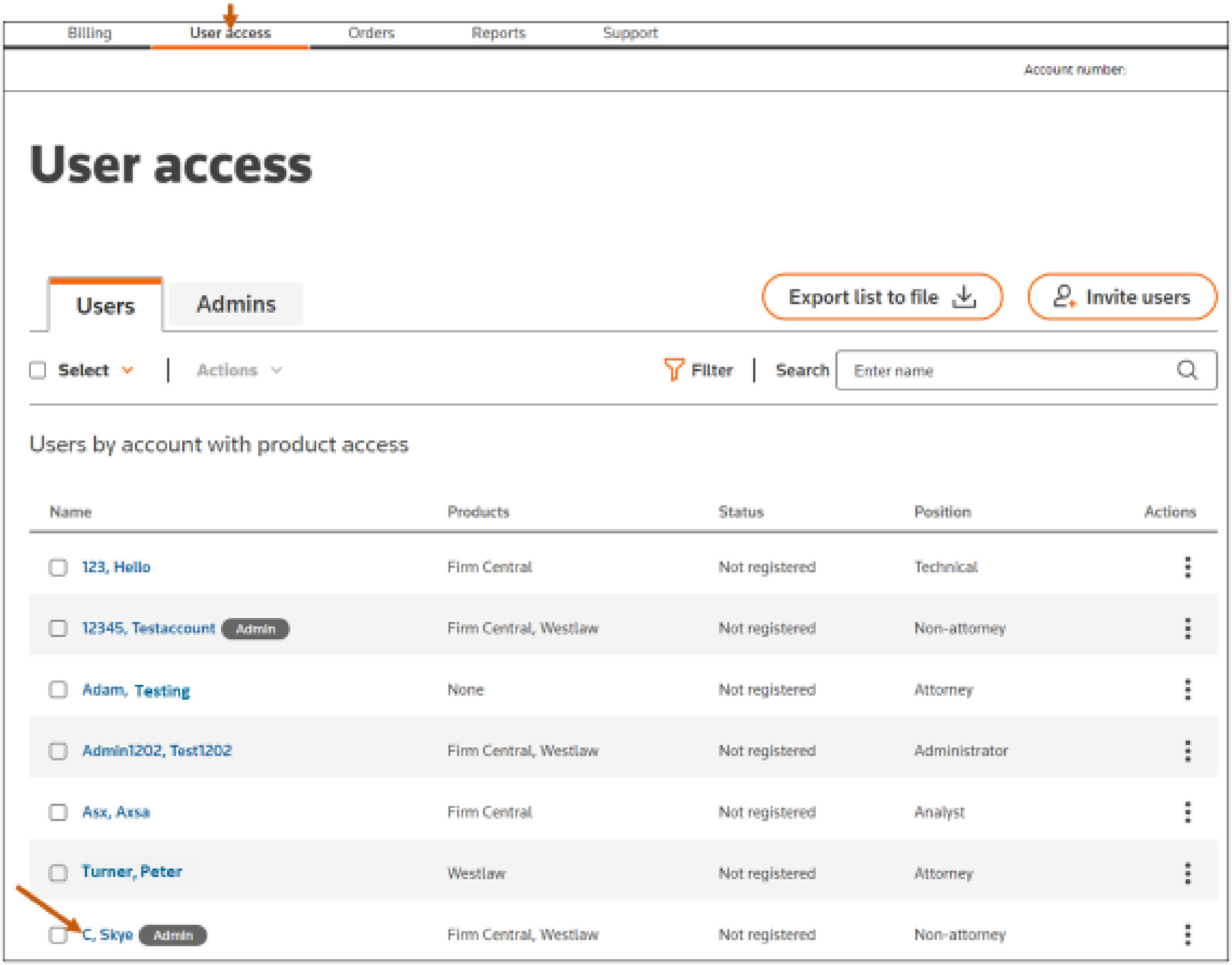
Afer clicking Continue, you will see a confirmation notification box indicating that a password reset link was emailed to the user.



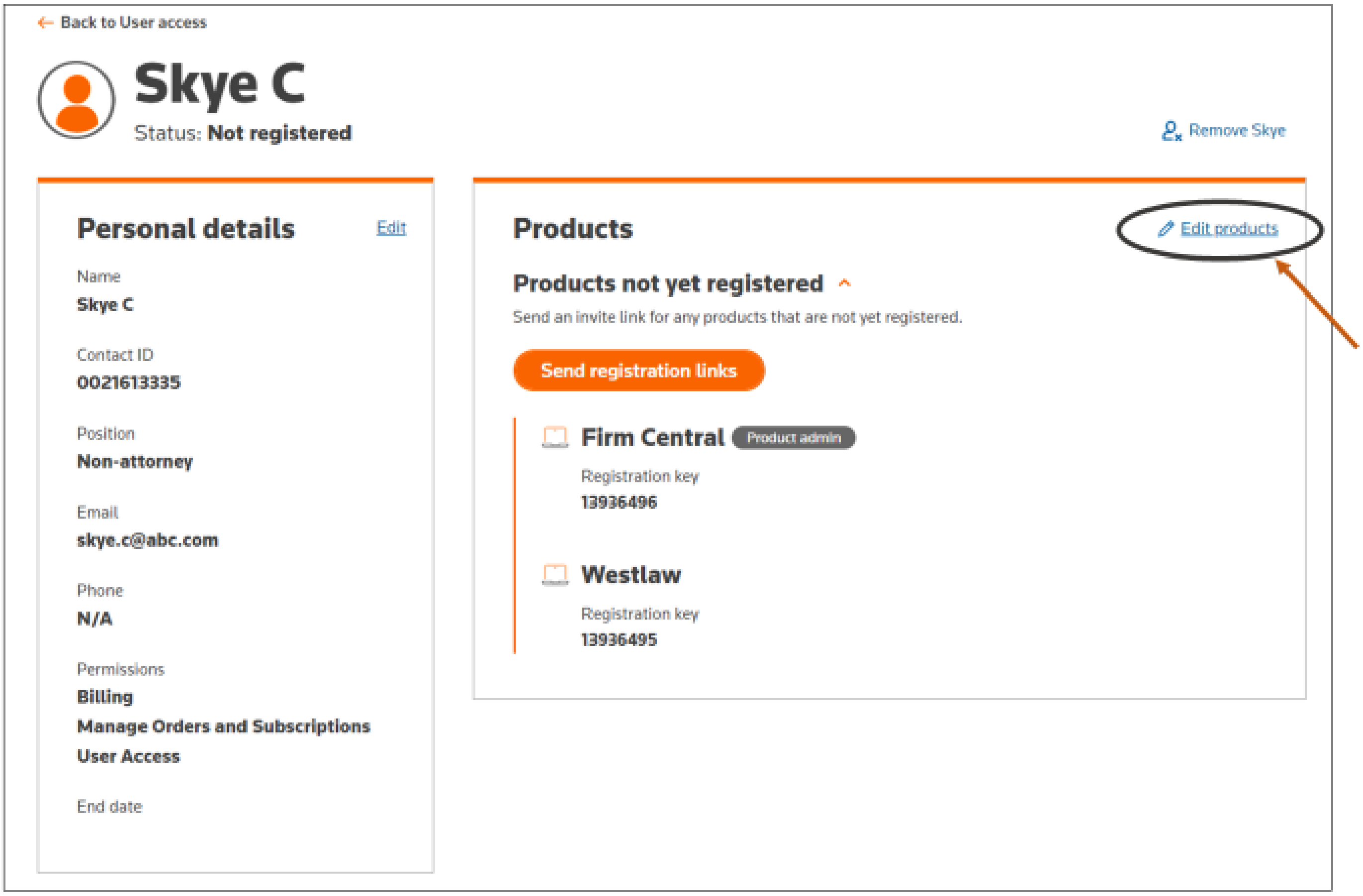
Edit Product Access (Add/Remove Product Access)

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

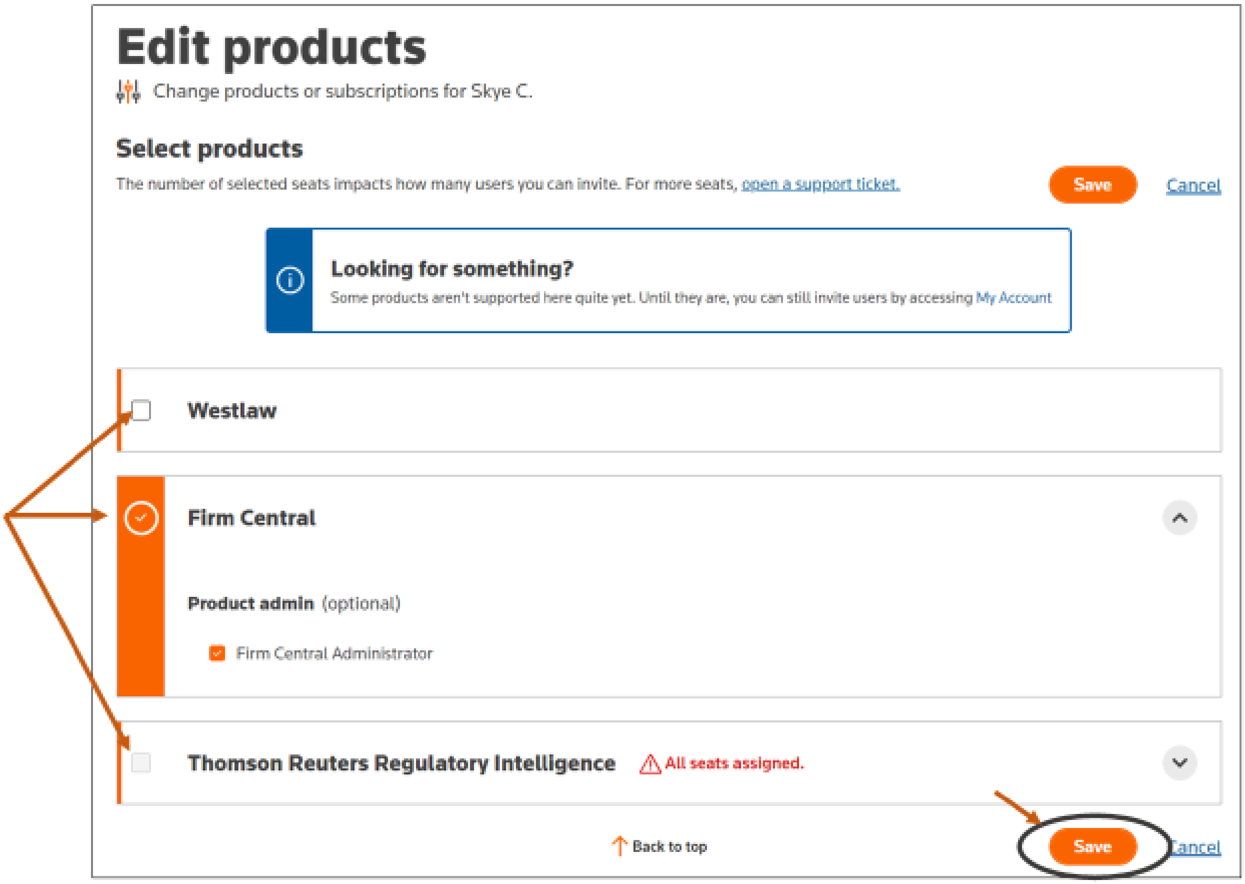
1) Navigate to the **User access** tab and click on the user whose product access you want to update.



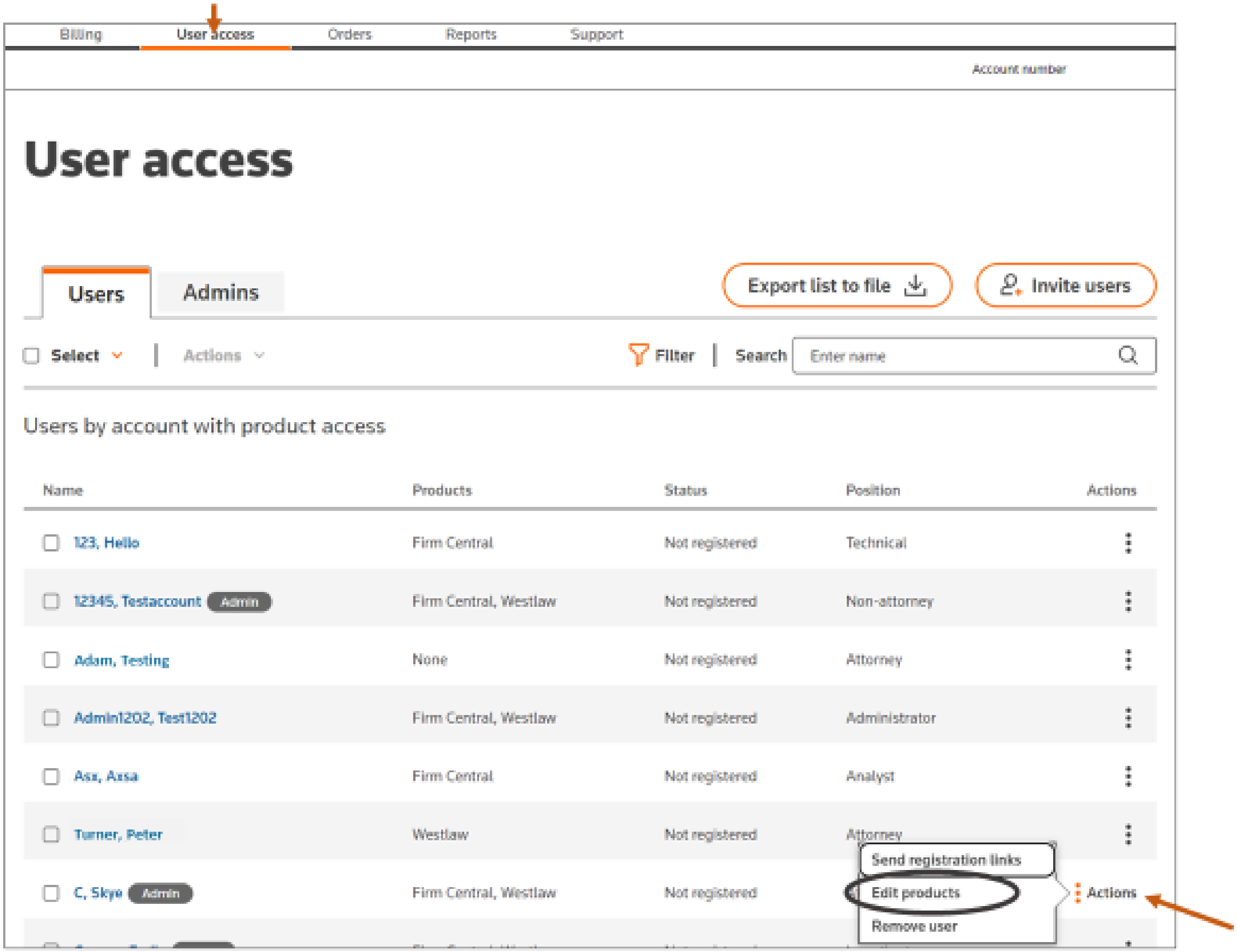
Next, click on **Edit products** on the right-side of the **Products** box.



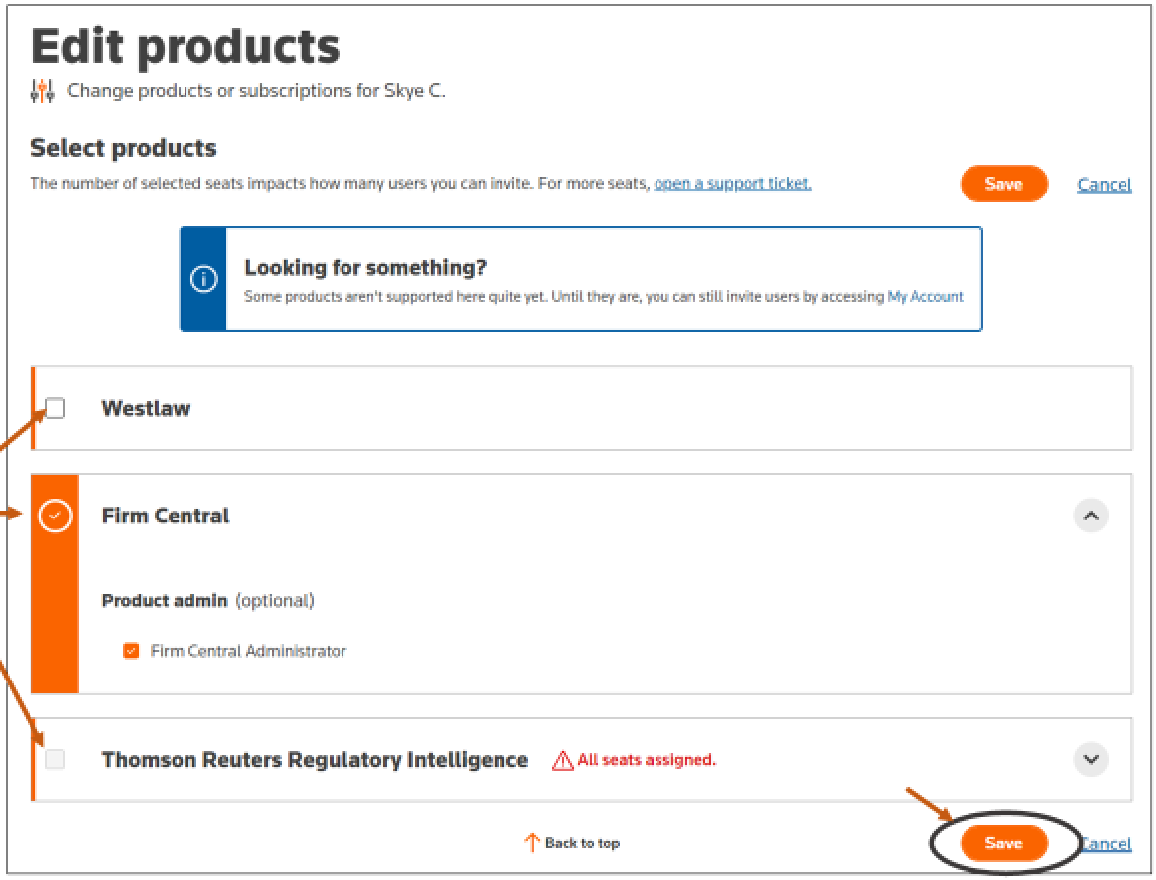
Then, select or deselect any product(s) access you want to add or remove and click **Save**.



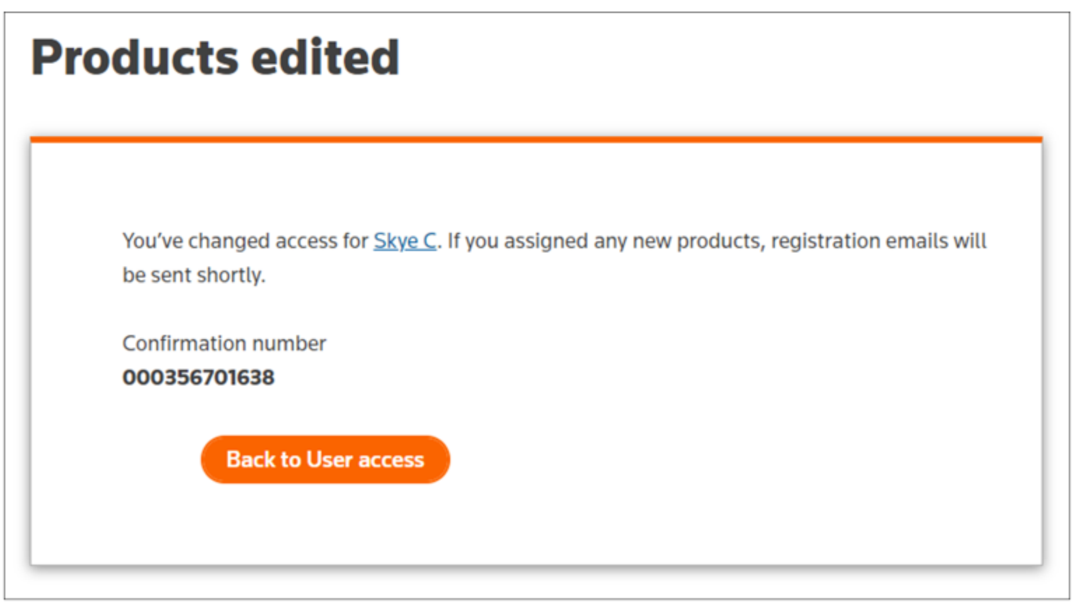
2) Navigate to the **User access** tab. Click on the three dots under the **Actions** tab for the user whose product access you want to change. Then, select **Edit products**.



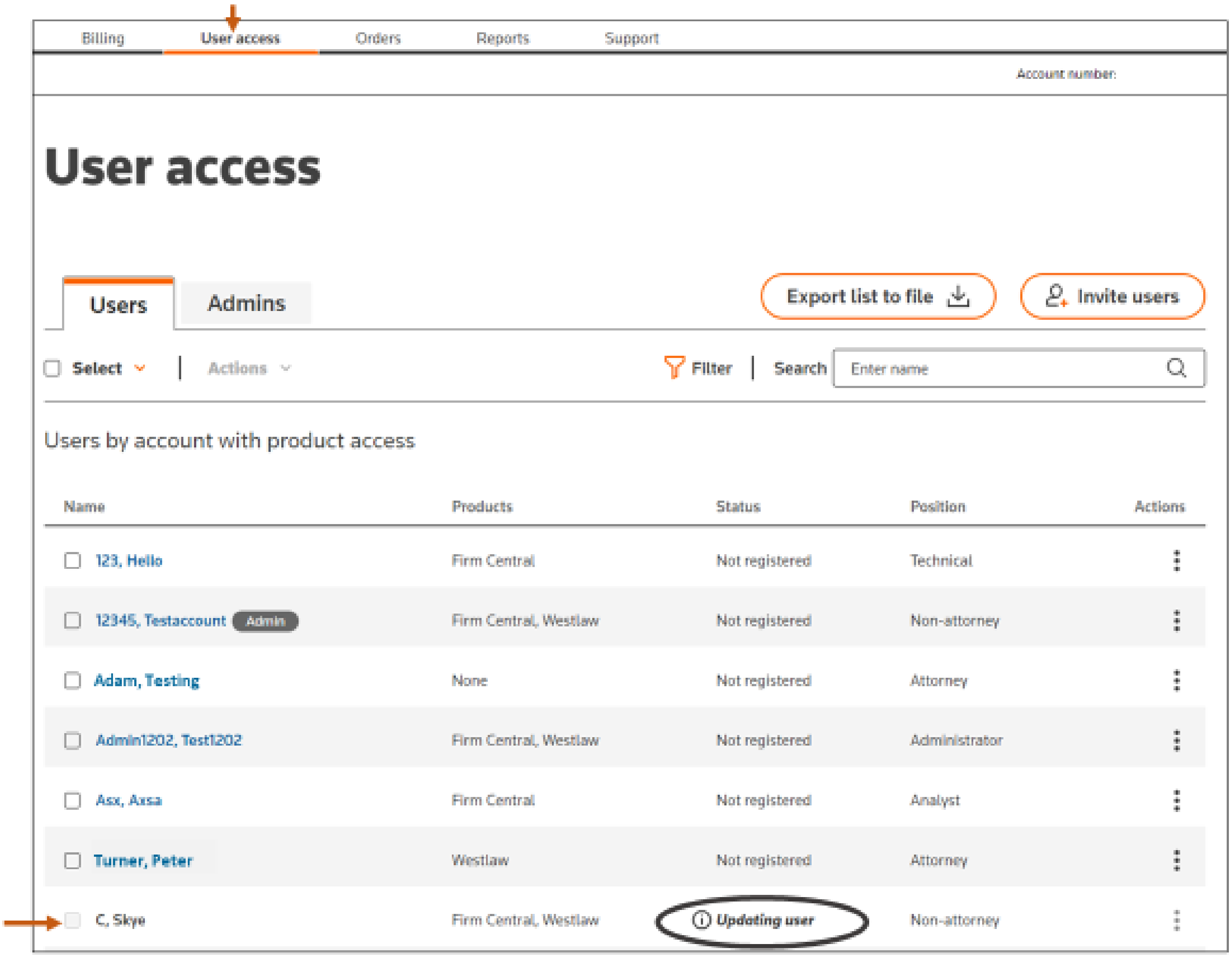
Then, select or deselect any desired product(s) and click **Save**.



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



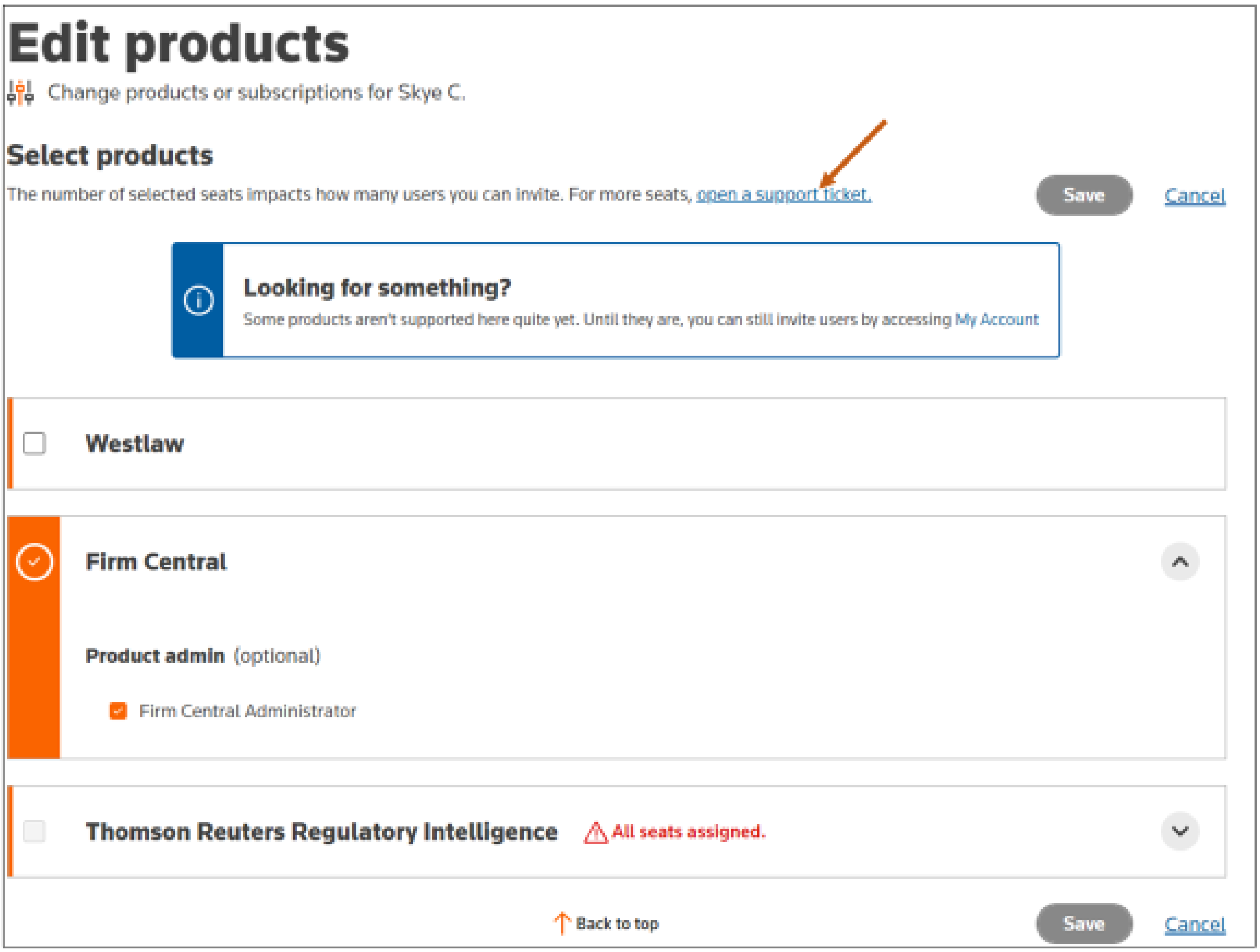
If you return to the **User access** tab immediately after editing a user's product access, the status for that user will appear as **Updating user**.



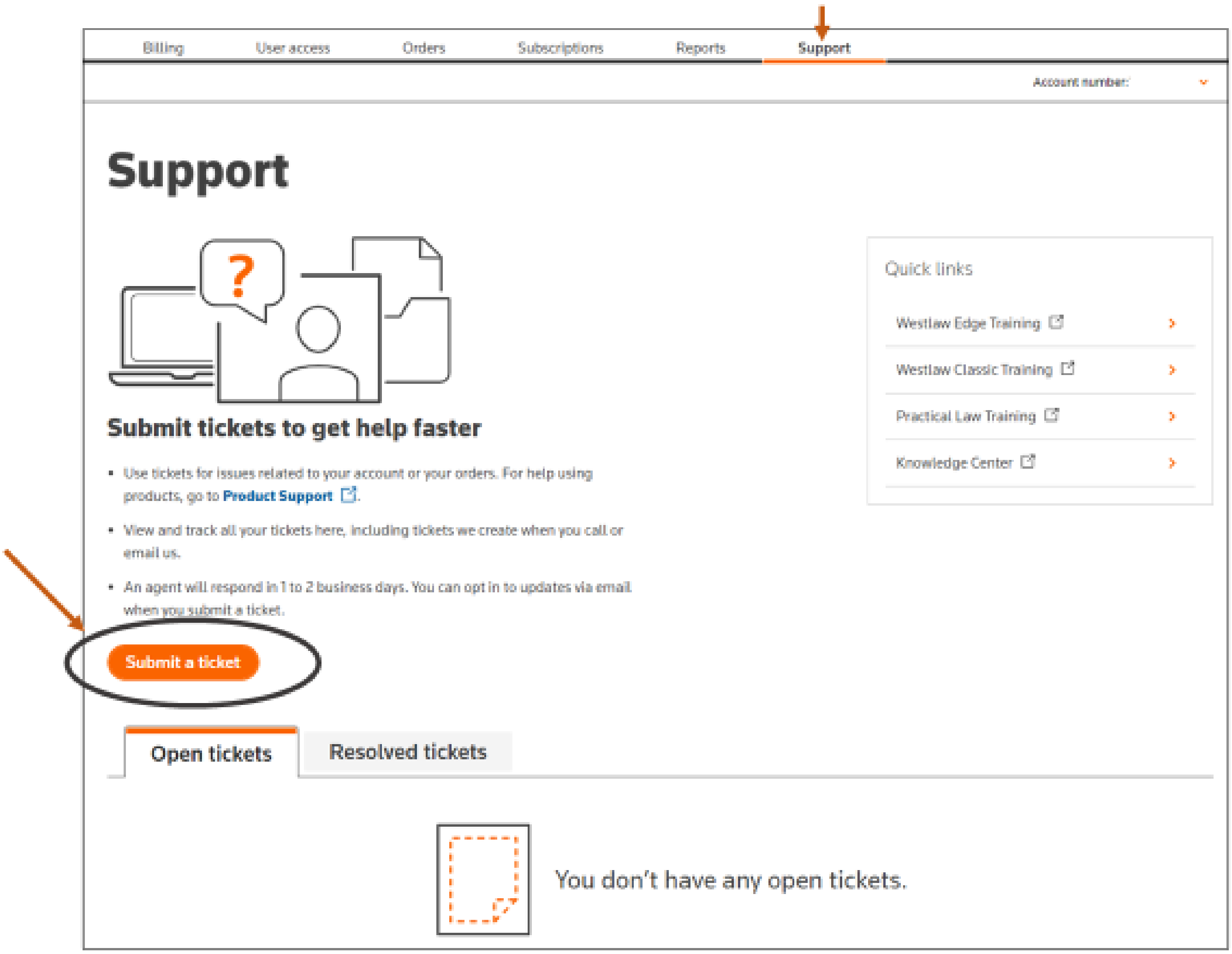
Add Additional Seats

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**.



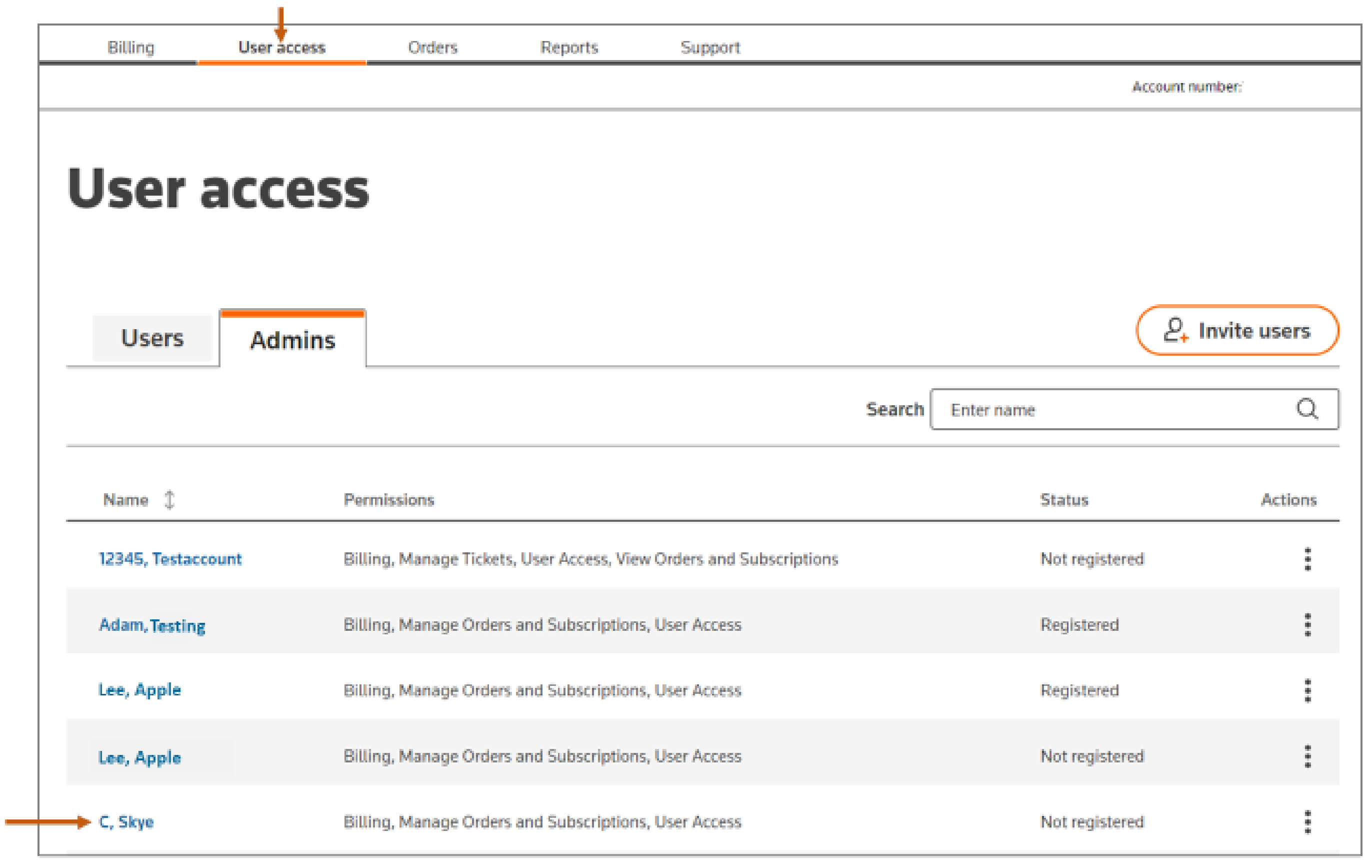
To open a support ticket using the Support tab, navigate to the **Support** tab and click **Submit a ticket**.



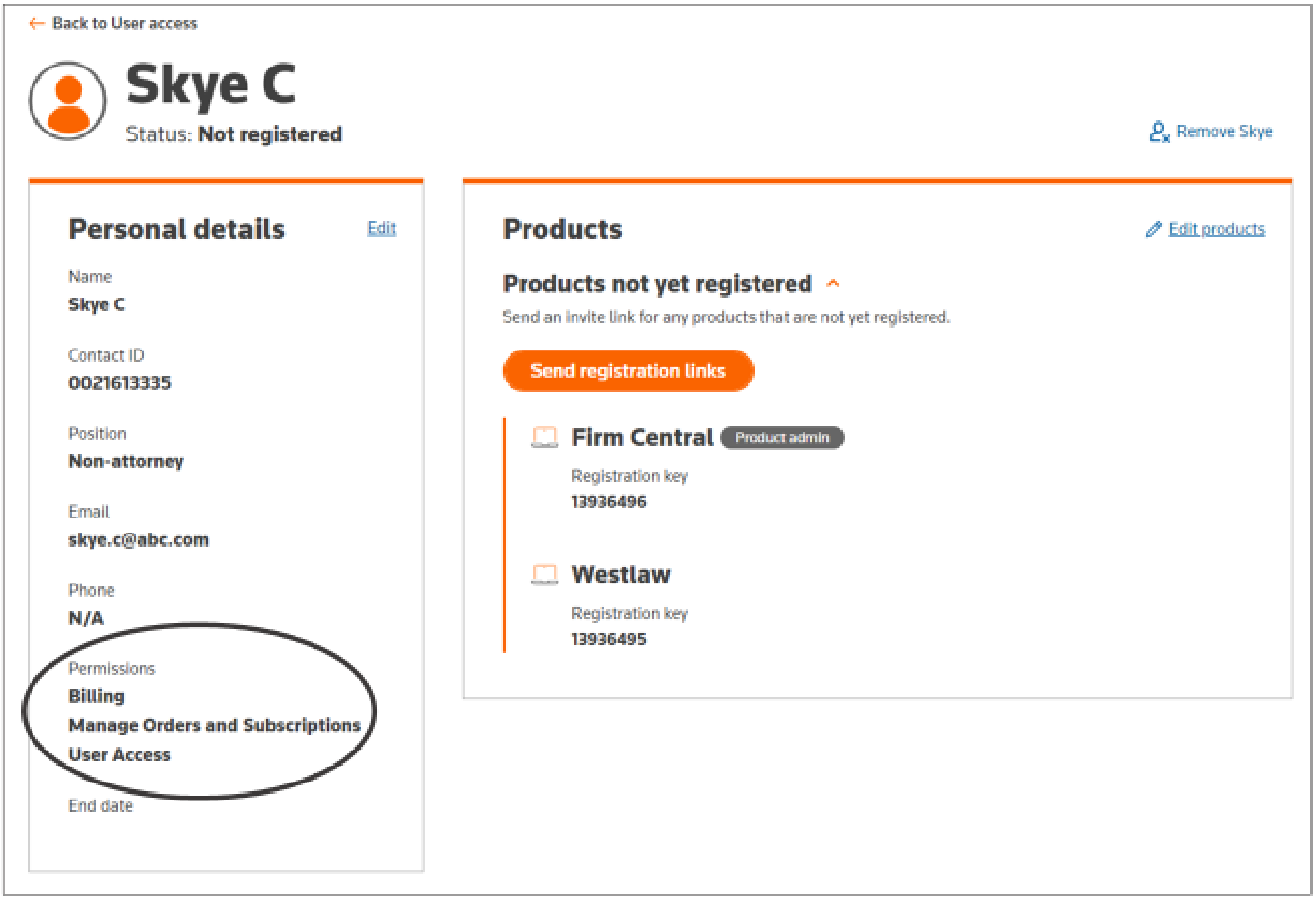
Manage Administrative Users

View and Edit Administrator User Details

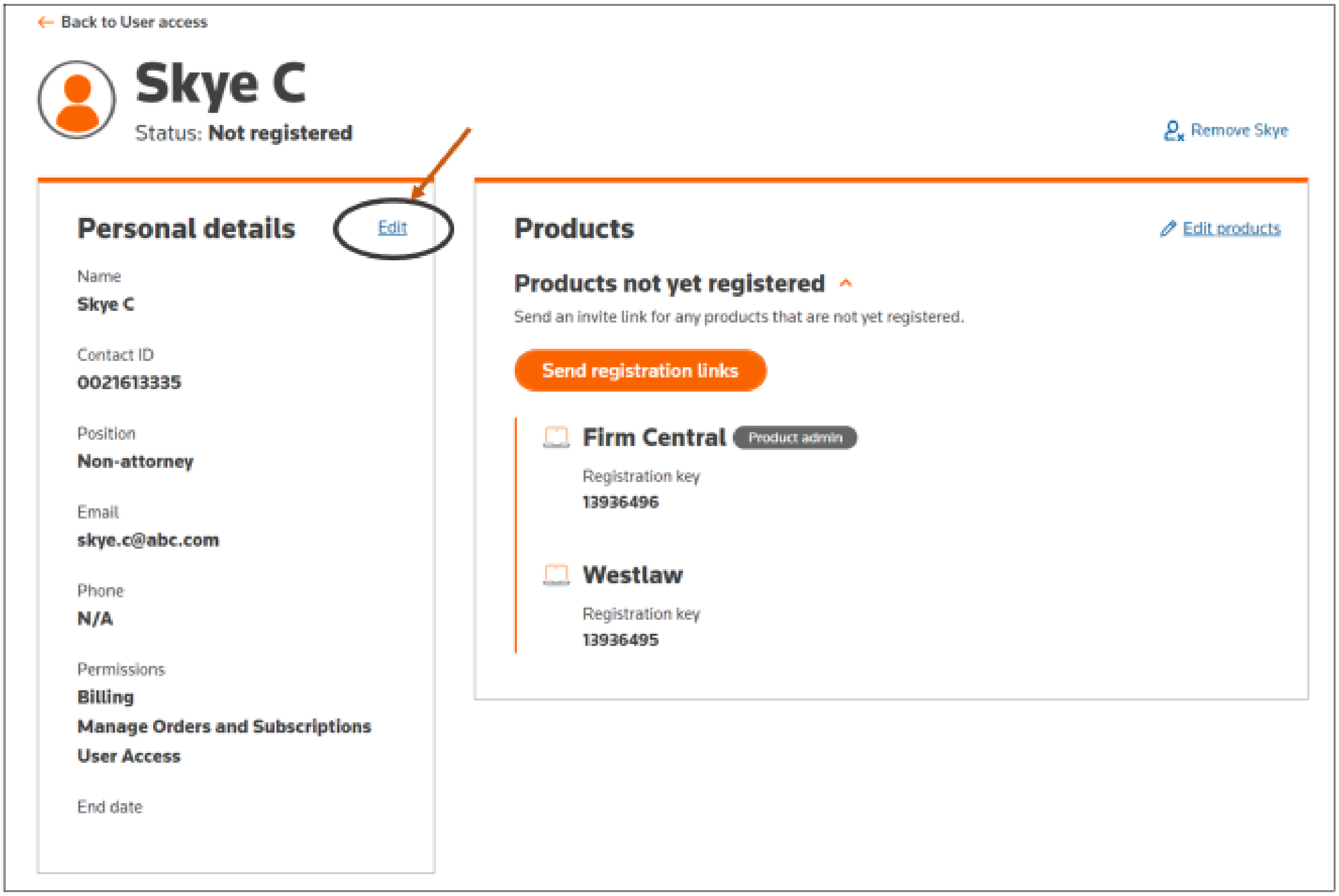
To view an admin user's details, navigate to the **User access** tab. Next, click the **Admins** tab. Then, click on the desired user's name.



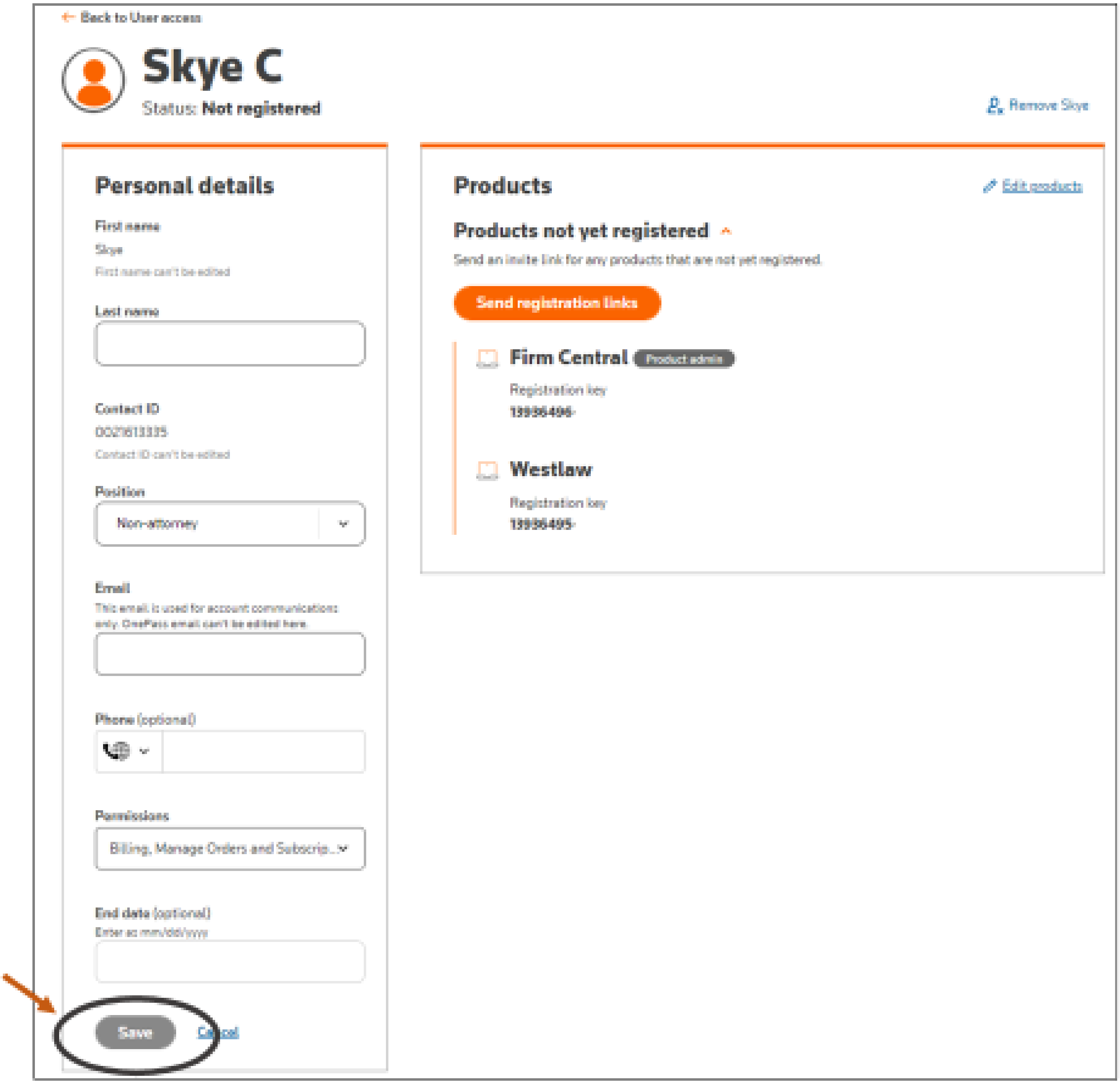
Next, view the user's personal details, including **Permissions** at the bottom of the **Personal details** box, and product access.



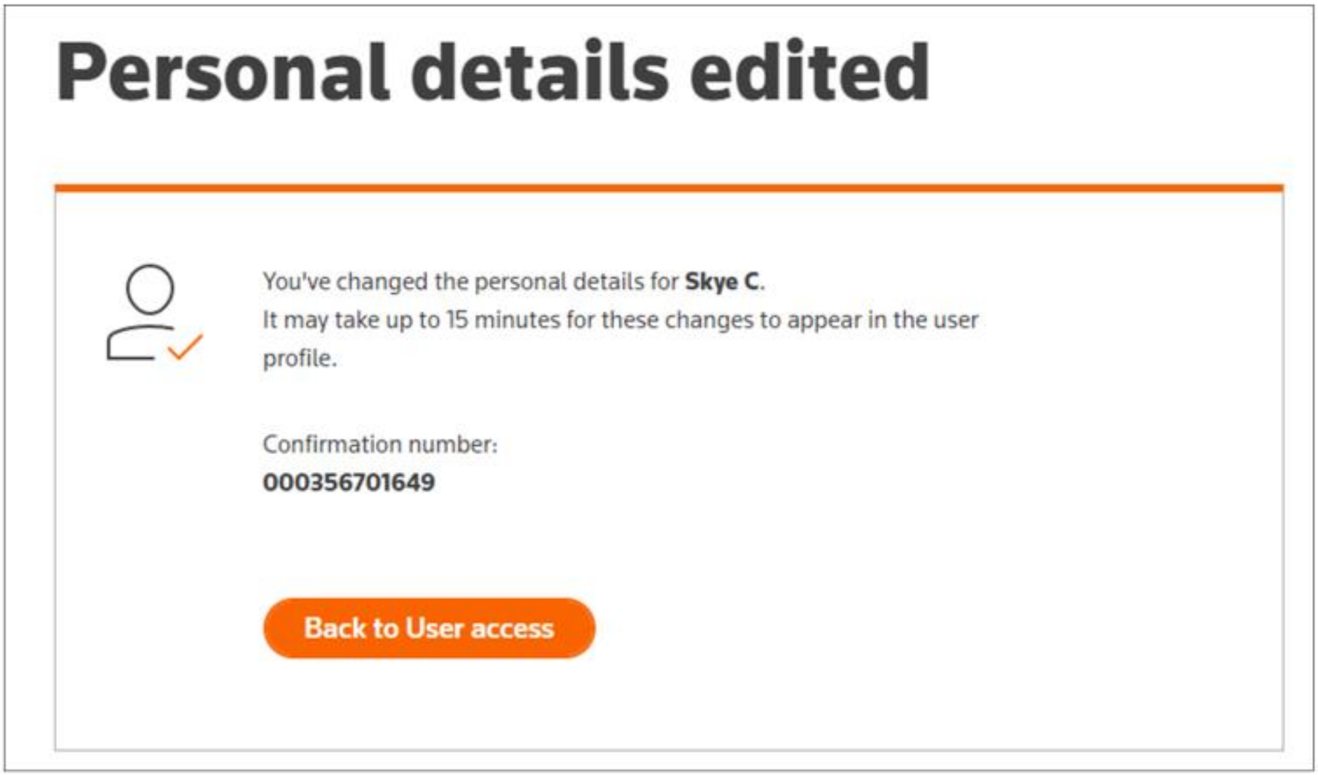
To edit, click **Edit** on the right side of the **Personal details** box.



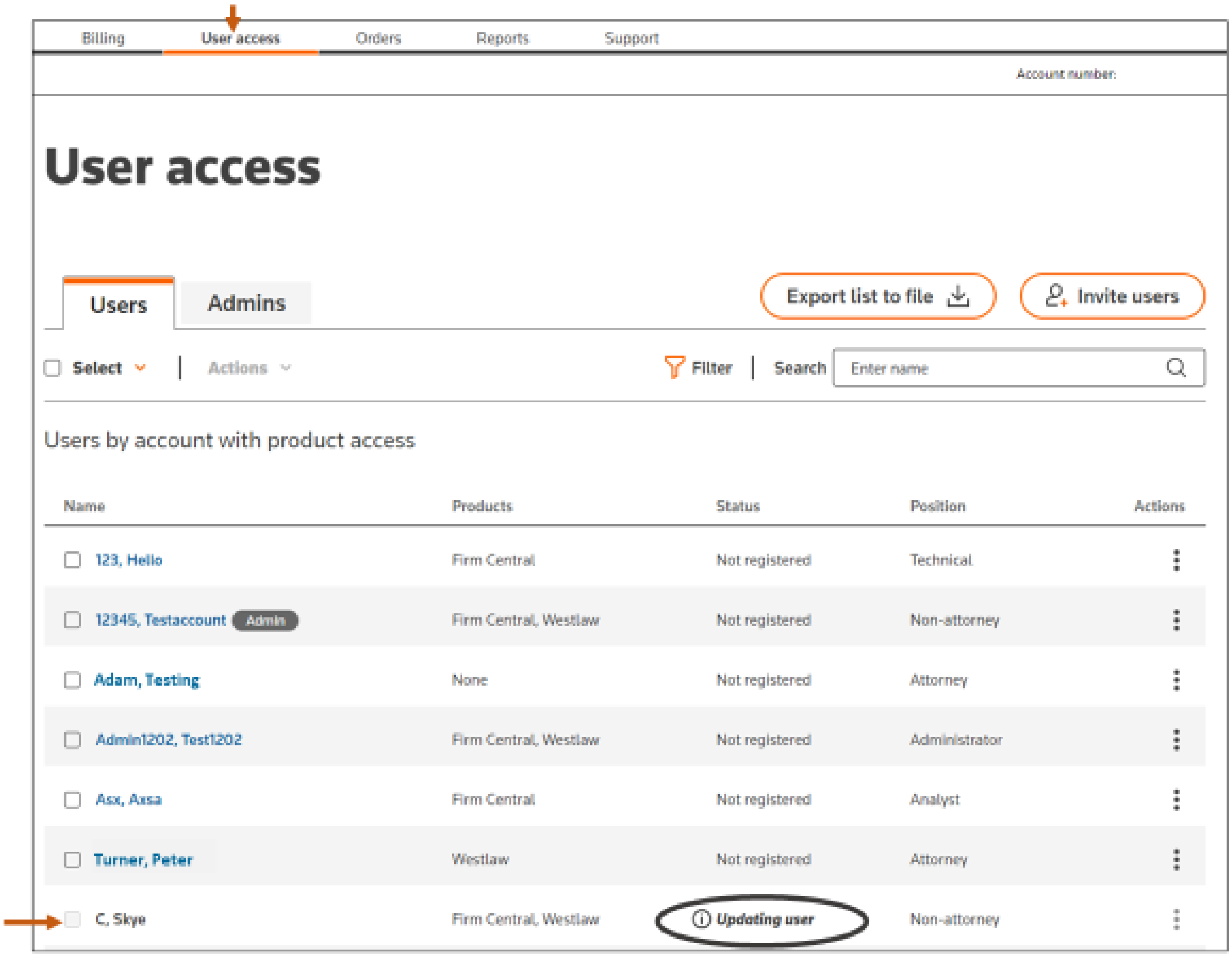
Next, make any desired changes to the Last name, Position, Email, Phone number, Permissions, and End date. Then, click **Save**.



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

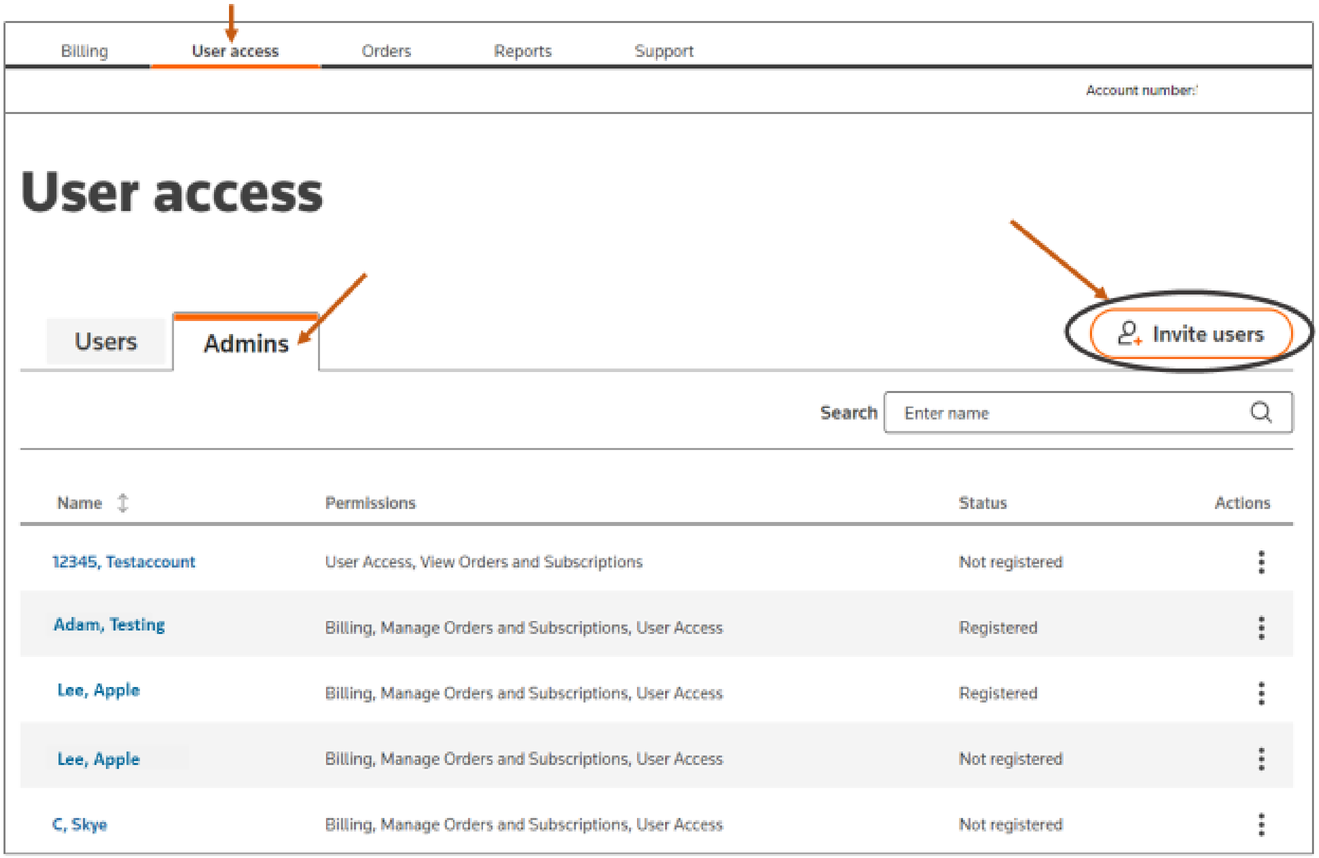


If you navigate back to the **User access** tab, the status for the user will appear as **Updating user** until the changes are fully processed.

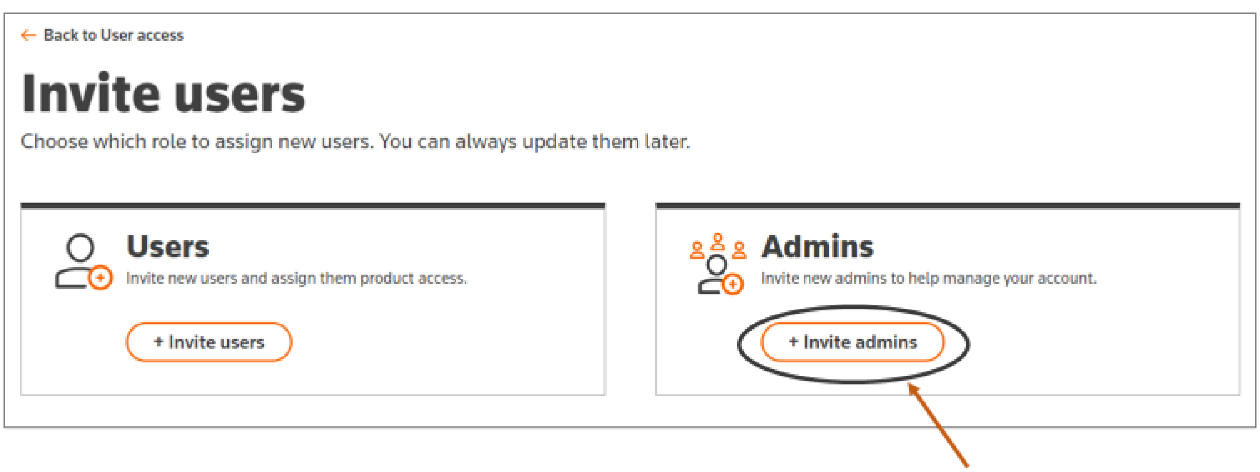


Add Administrator Users

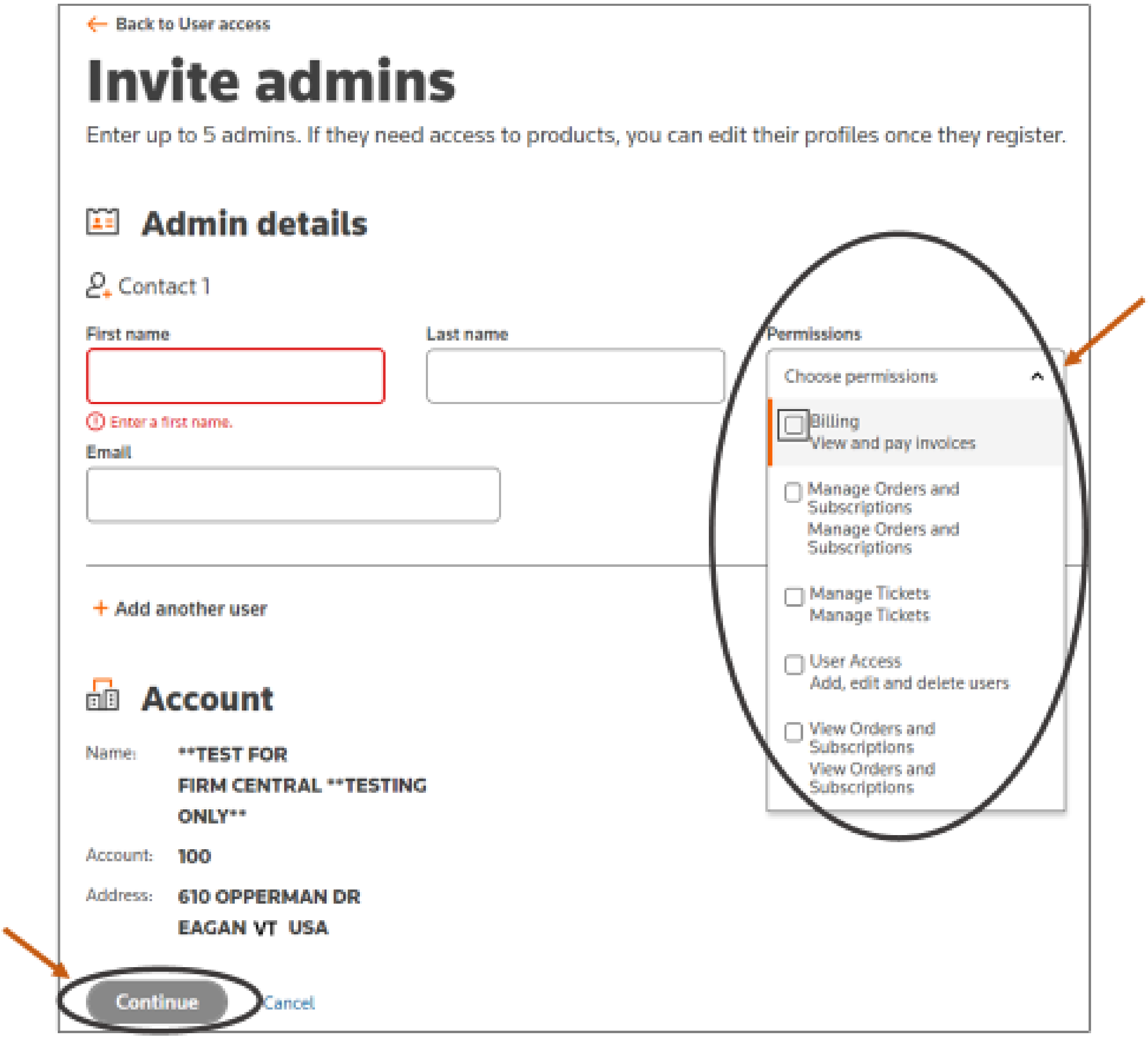
Navigate to the **User access** tab. Next, click the **Admins** tab. Then, click **Invite users**.



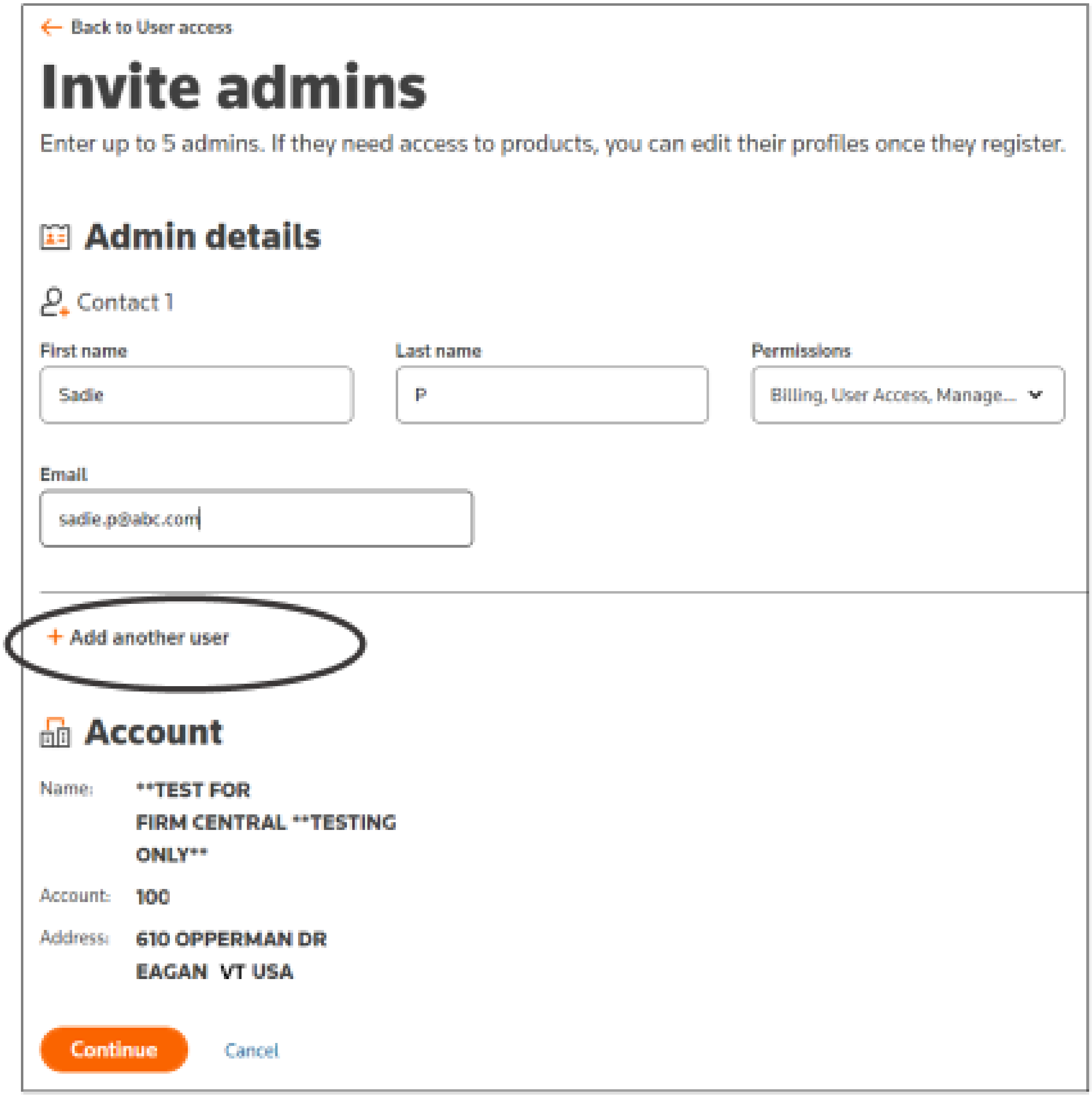
From the Admins box on the right, select **+ Invite admins**.



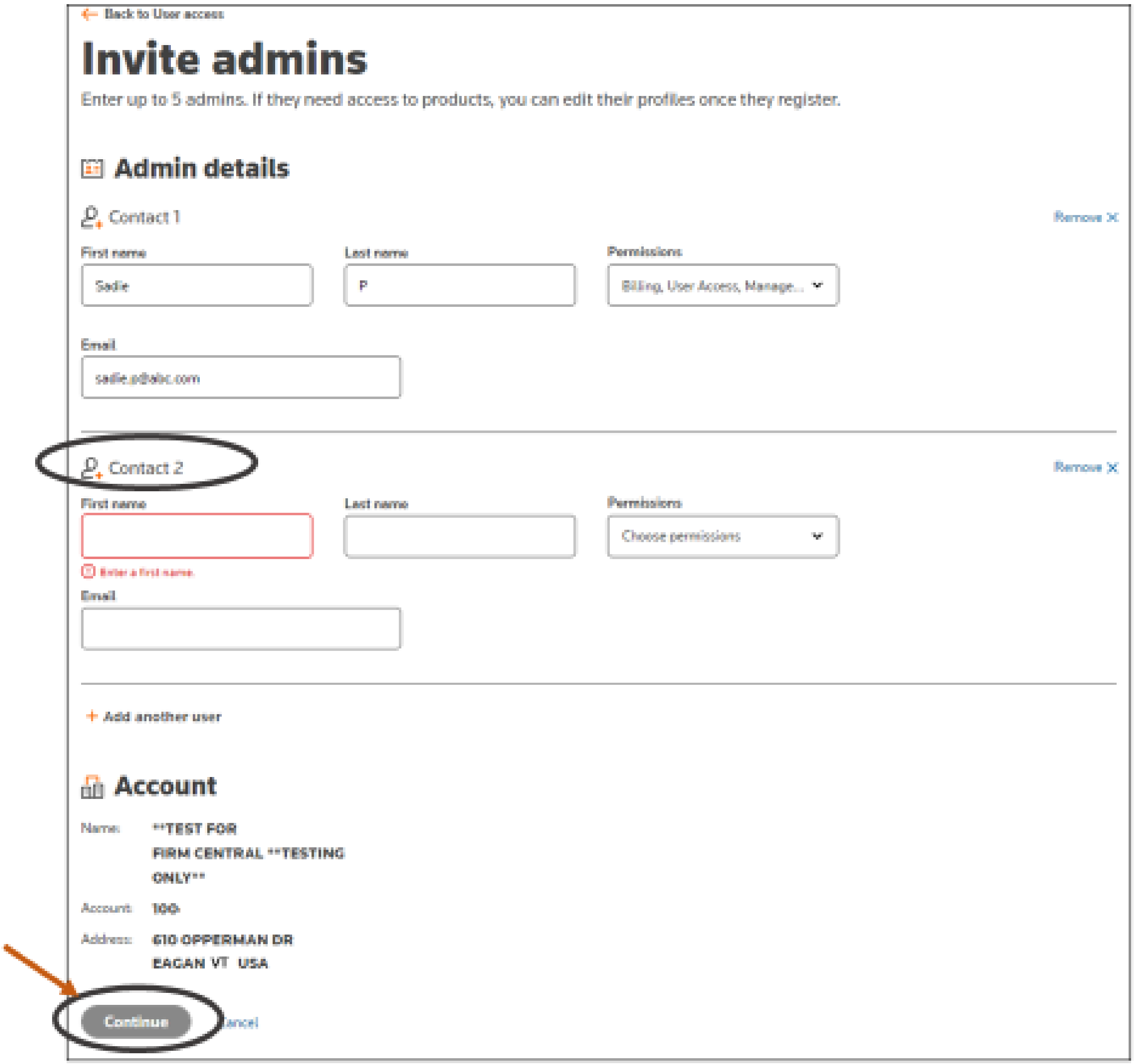
Add a first and last name, email address, and select the permissions you want to provide to that user from the dropdown menu. Then, click **Continue**.



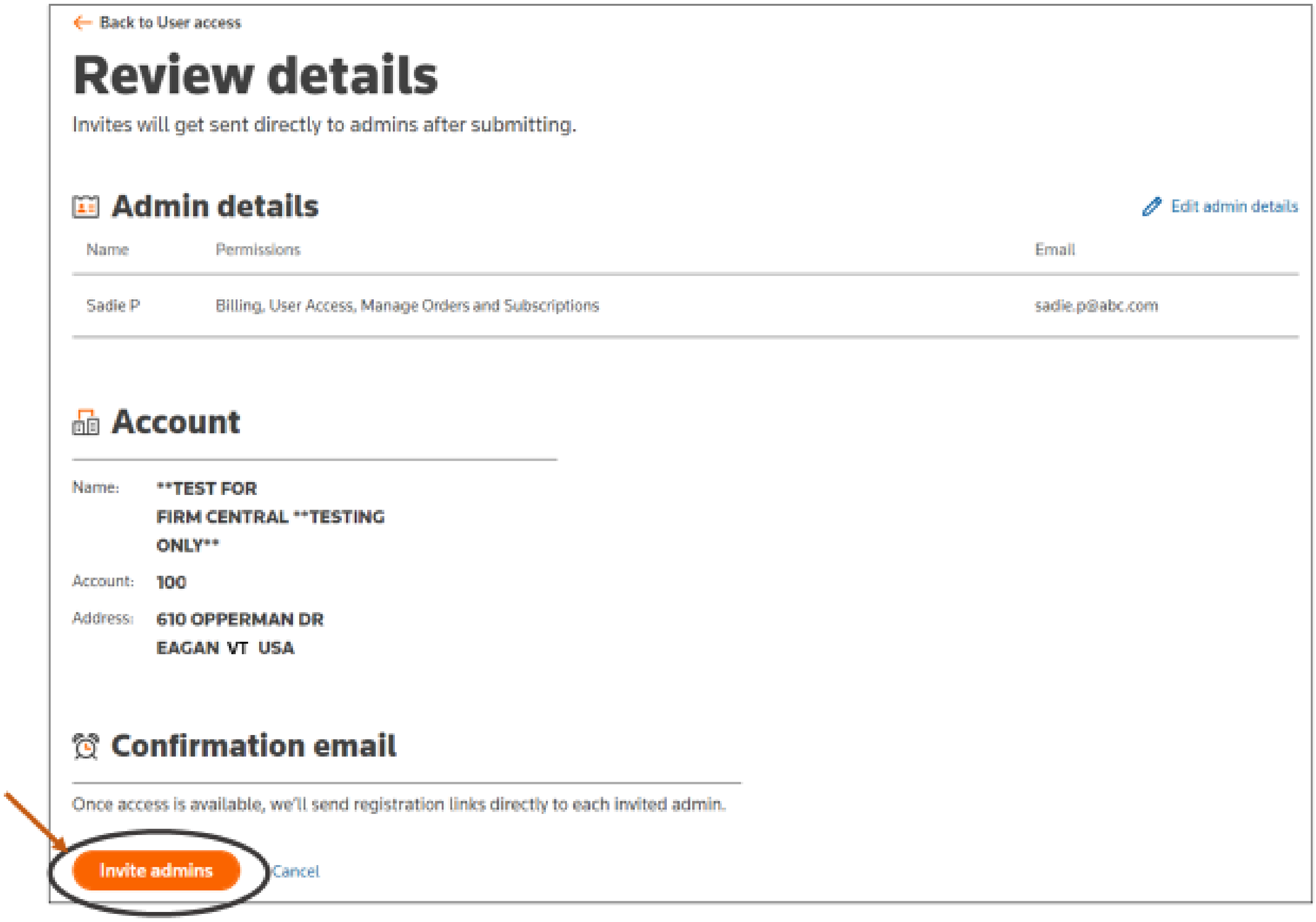
To add additional administrators, click **+ Add another user** on the left side.



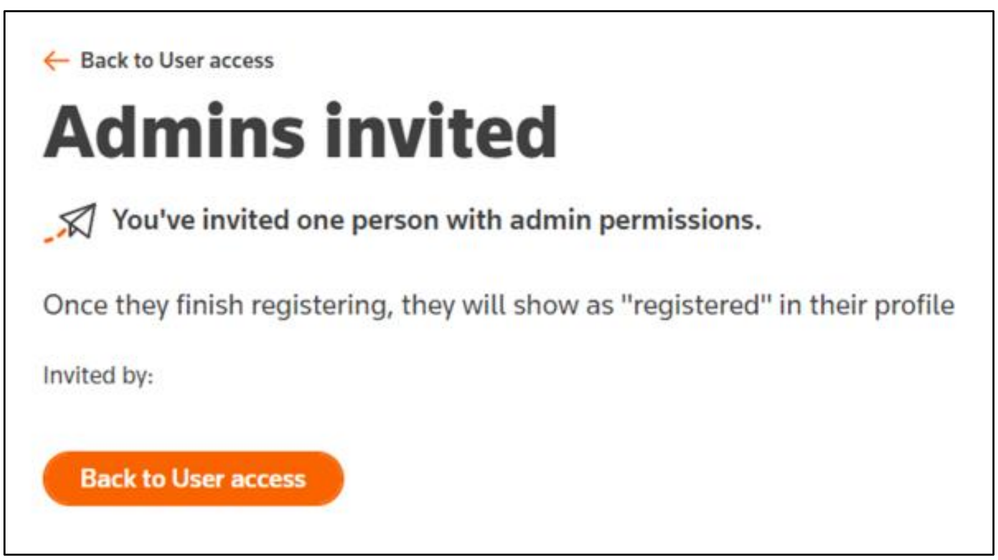
Under **Contact 2**, add a first and last name, email address, and select their permissions from the dropdown menu. Then, click **Continue**.



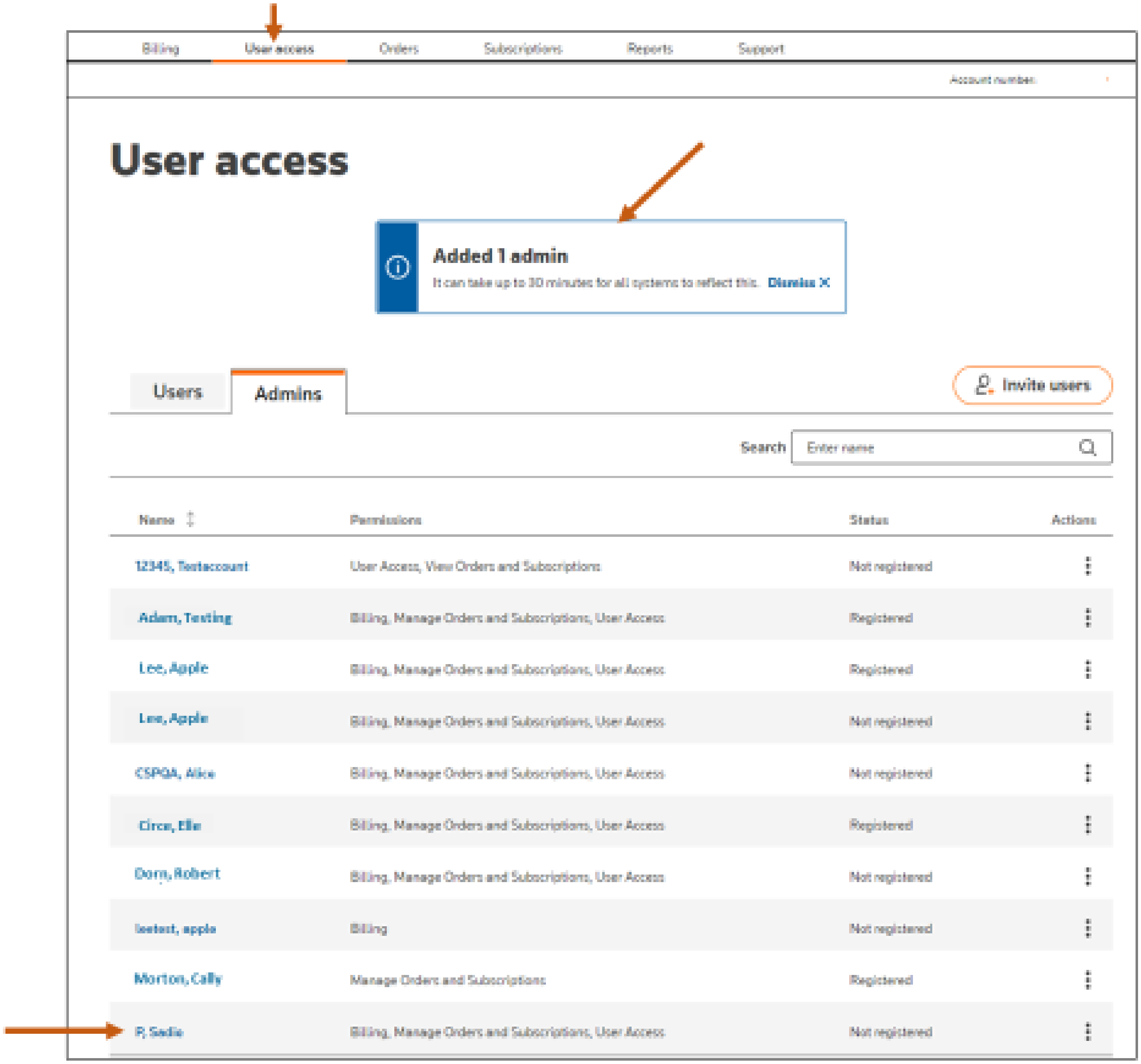
Then, click **Invite admins**.



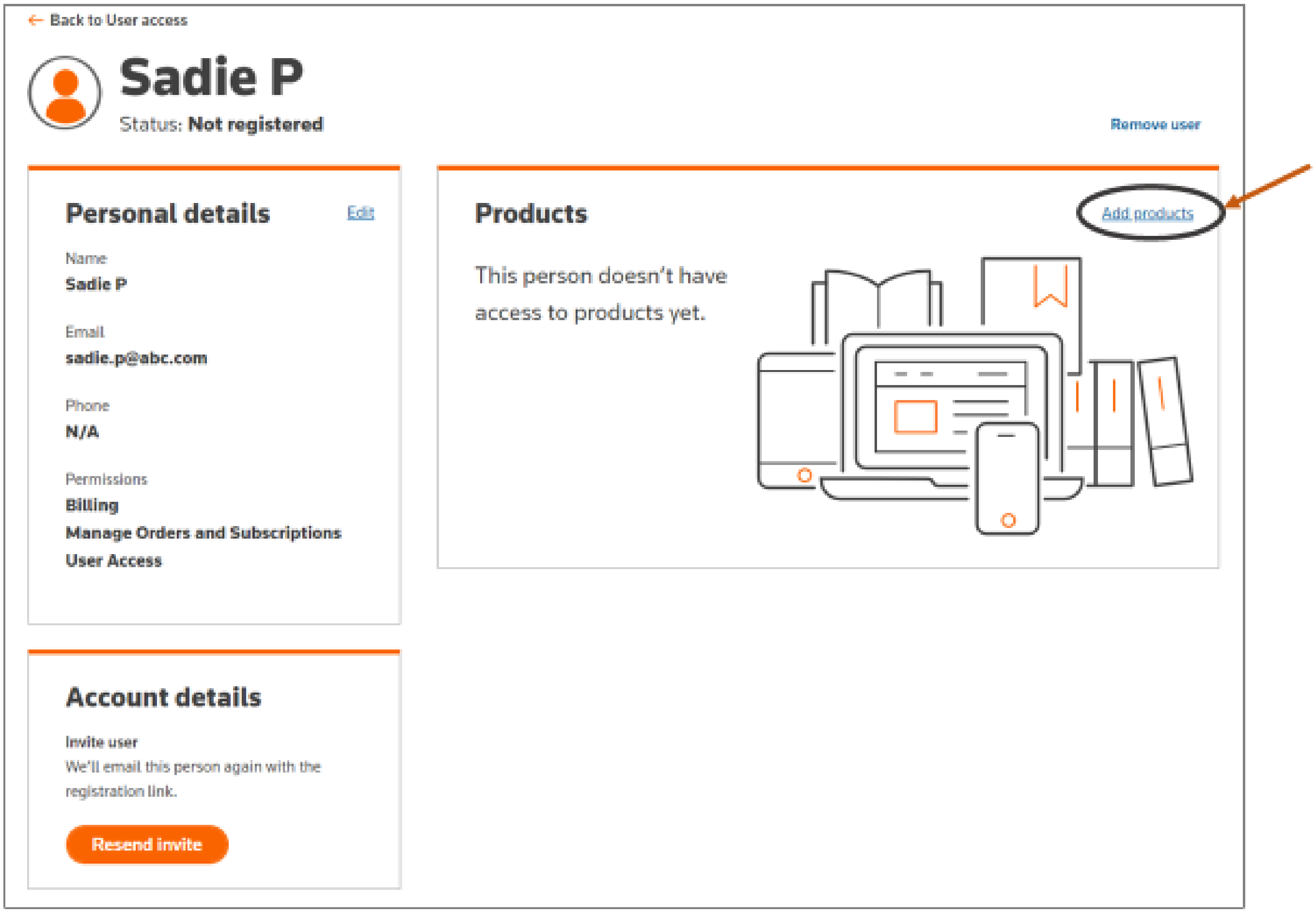
After clicking Invite admins, you will receive confirmation similar to the one below.



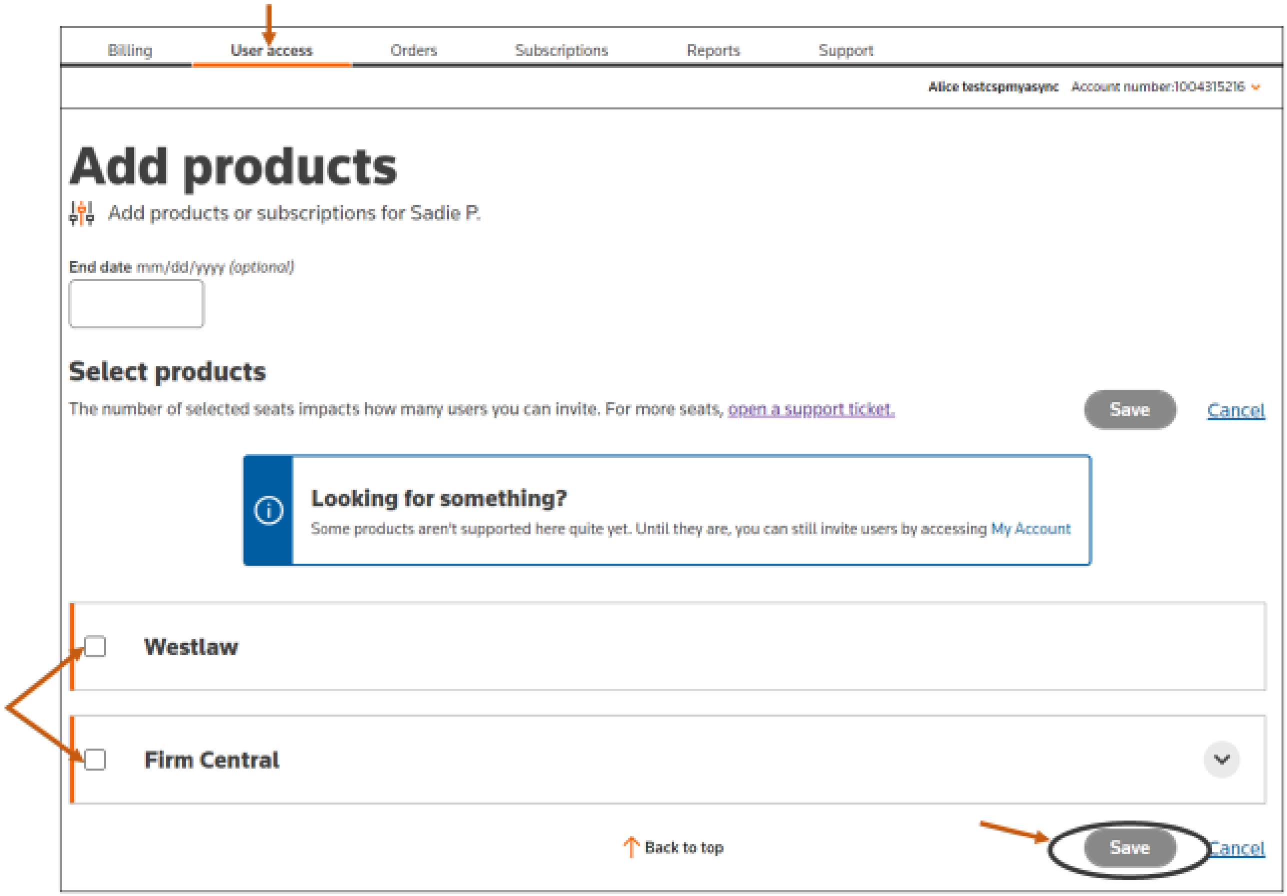
If you navigate back to the **User access** tab, you will see a blue box notification that a new user was added. Also, you can see the new user listed under the **Admins** tab.



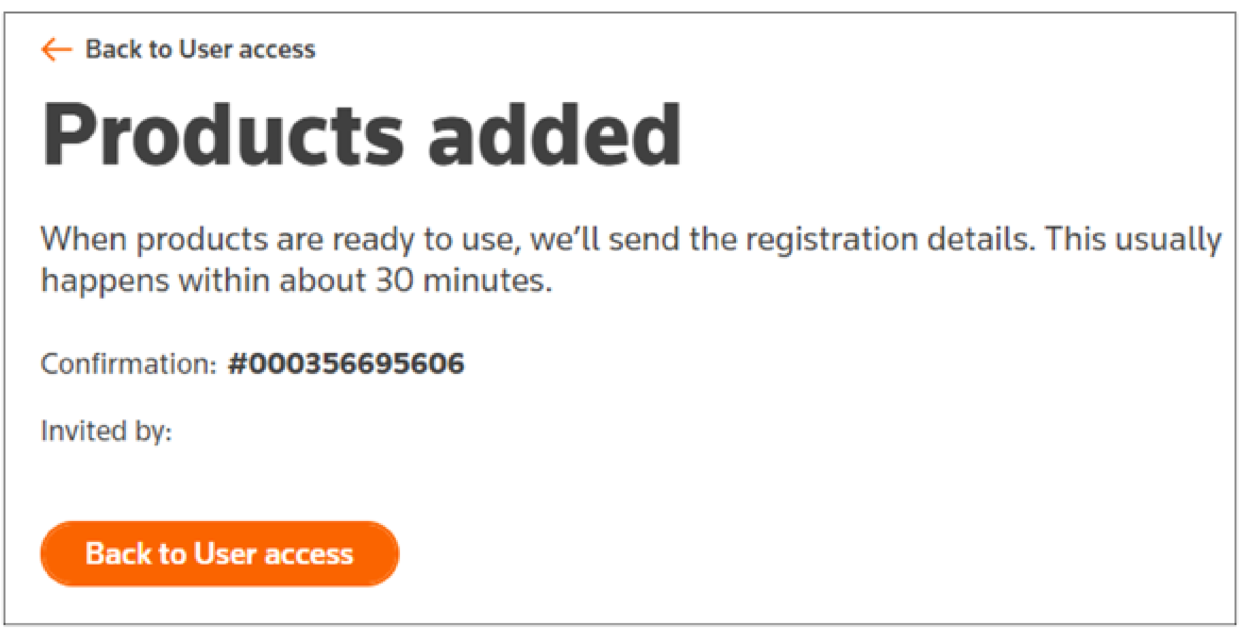
Next, from the **Admins** tab, click on a user's name. Then, click **Add products**.



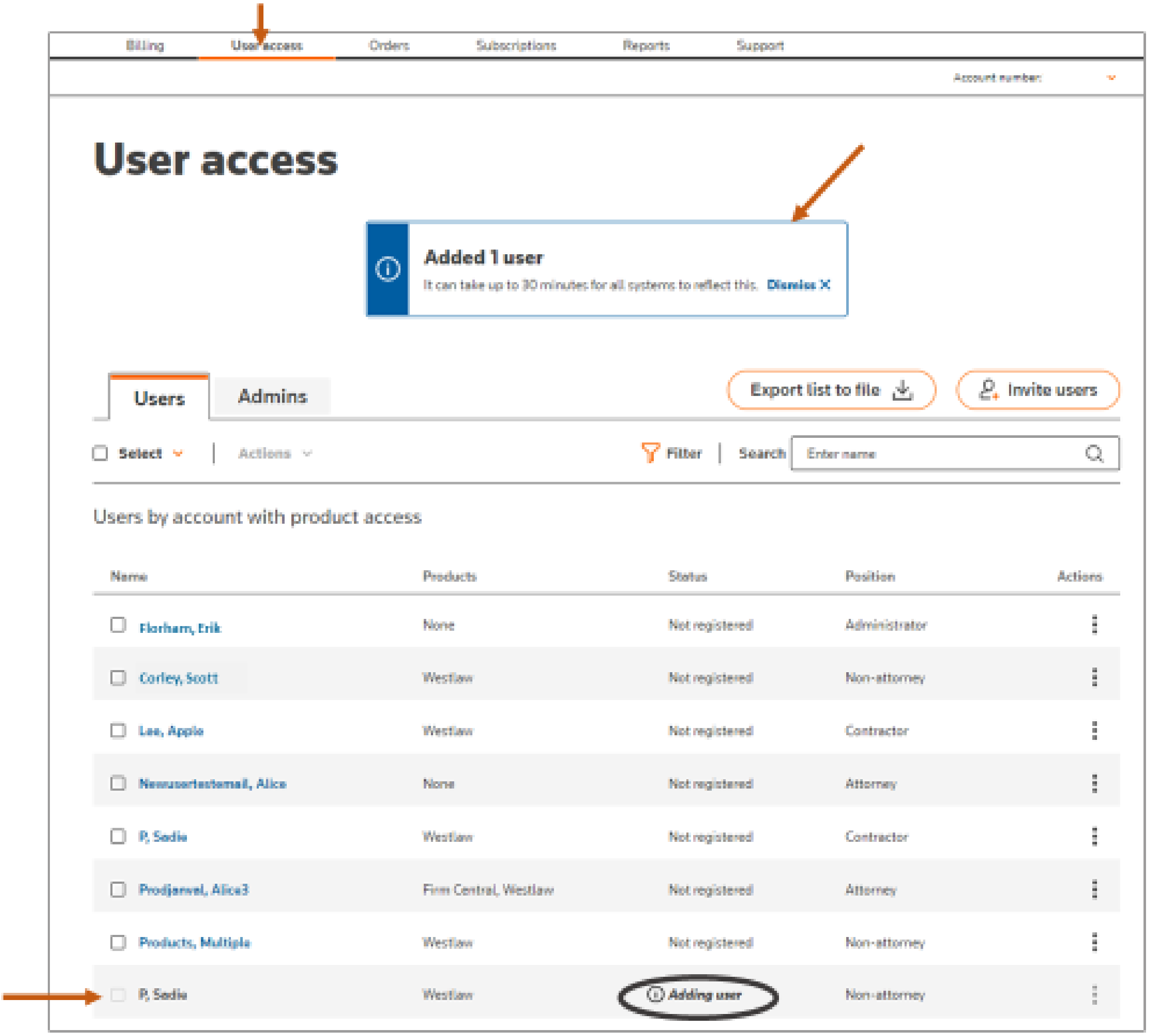
Next, select desired products. Then, click **Save**.



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



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

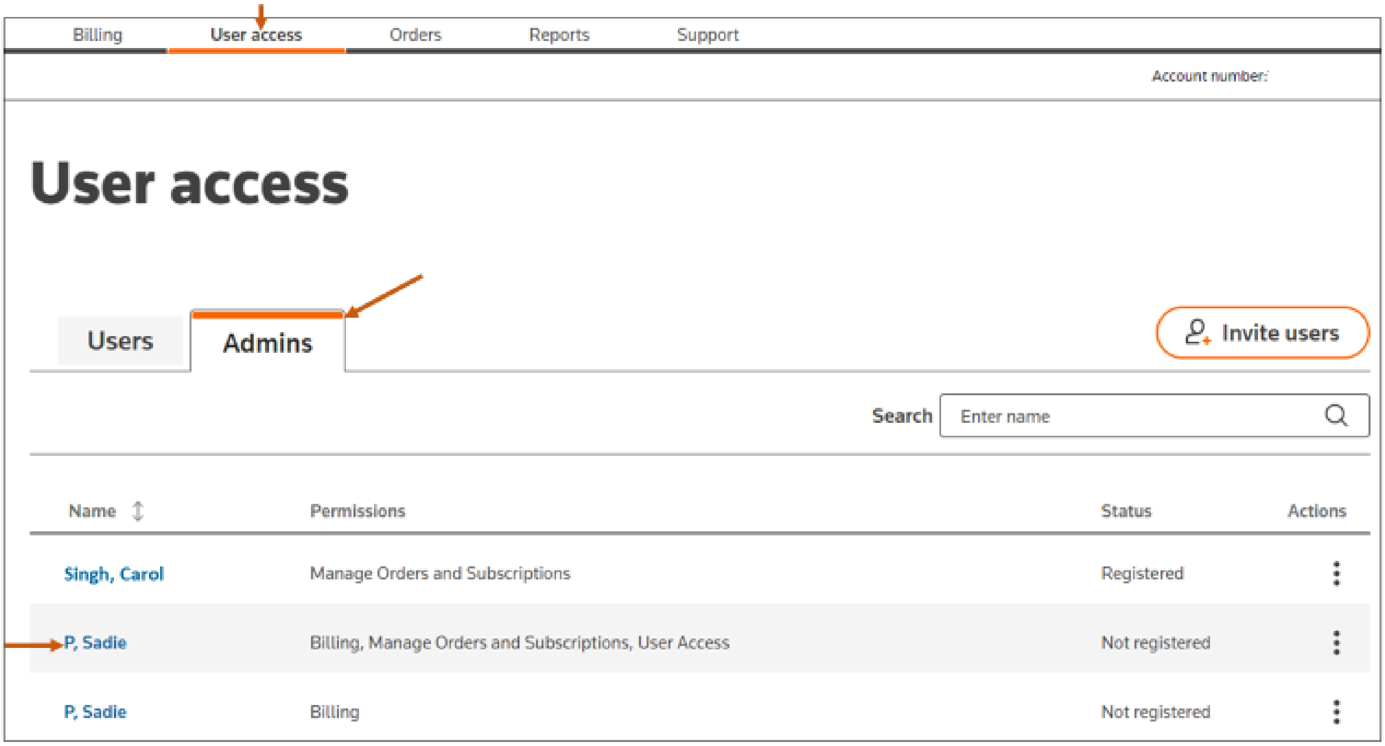


Remove an Admin User

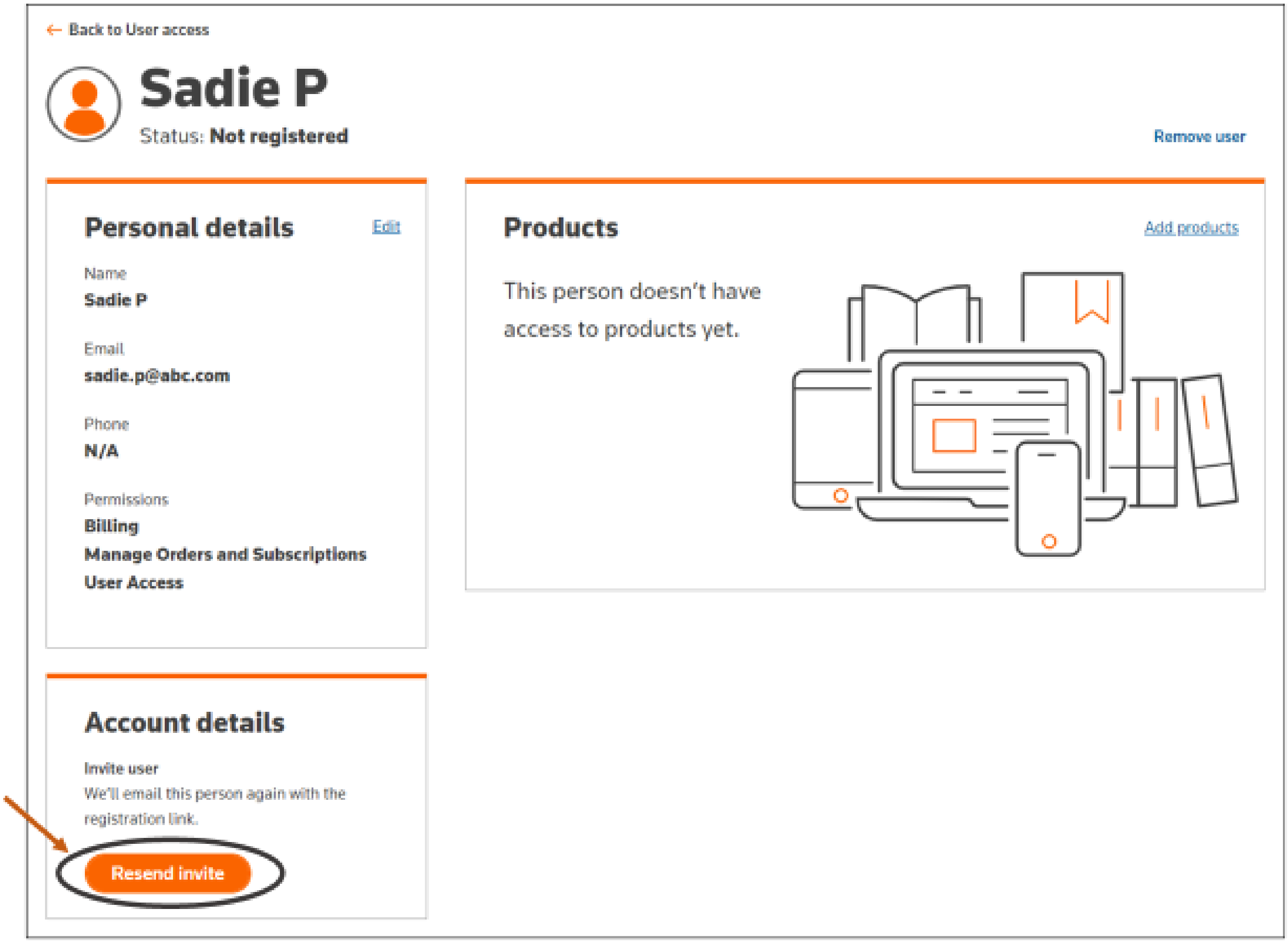
Navigate to the **User access** tab and select the **Admins** tab. Next, follow the steps for removing a user in the section Manage Product Users: Remove Users in this guide.

Resend Invitation to an Admin User

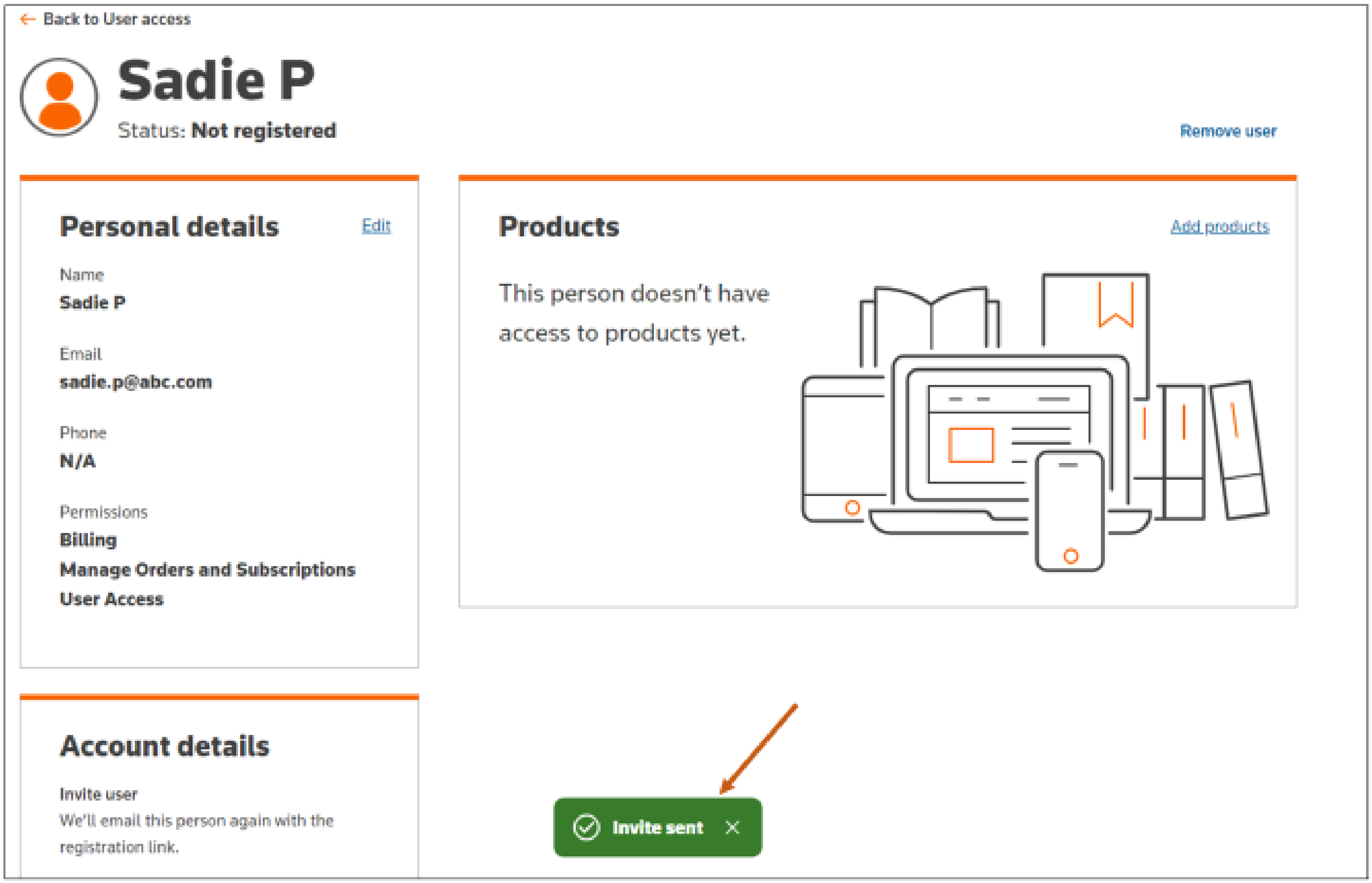
To resend an invitation to an administrator, navigate to the **User Access** tab and click on the **Admins** tab. Next, click on the user to whom you want to resend the invite.



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

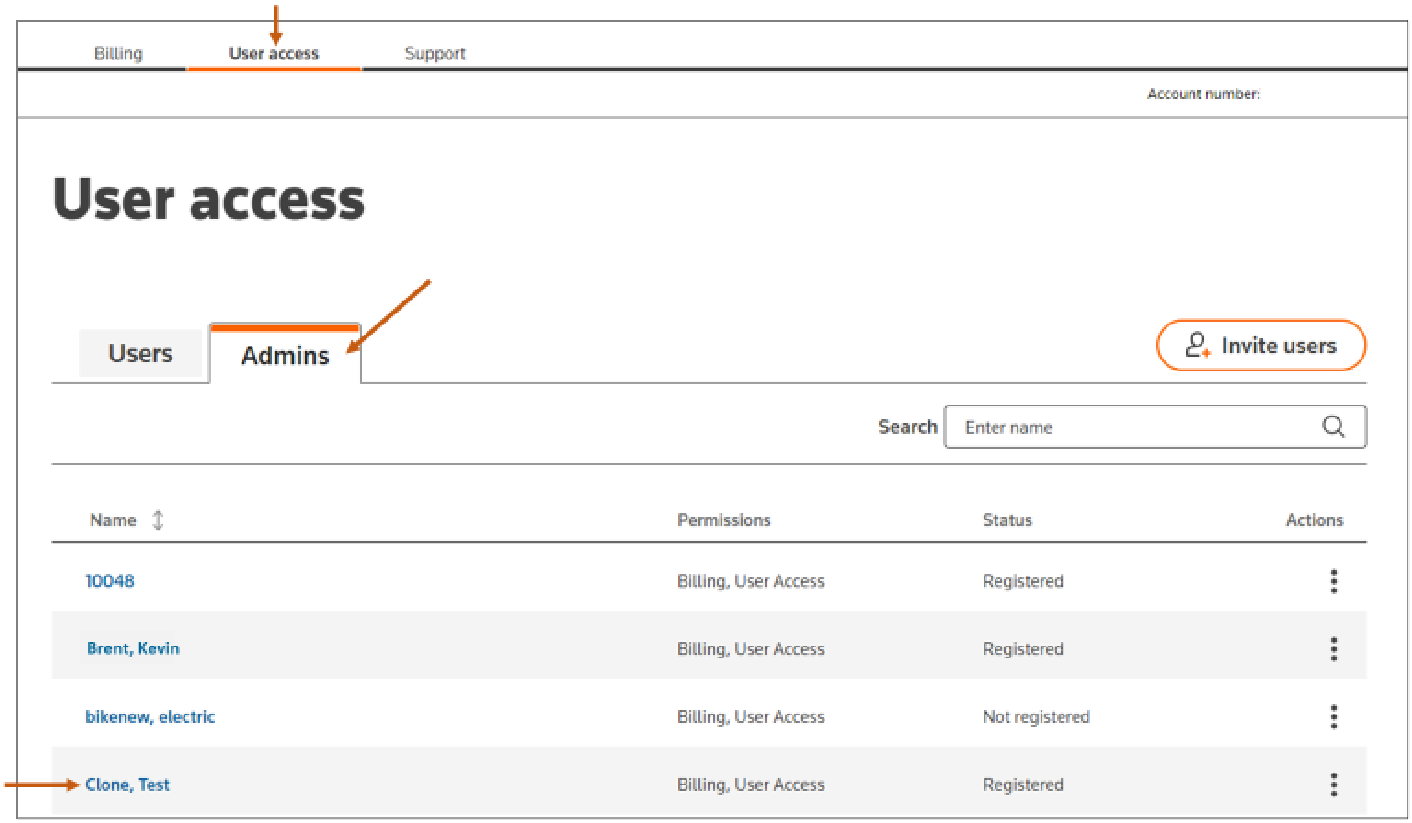


After clicking Resend invite, you will see a green box similar to the one below indicating that the invite was sent.

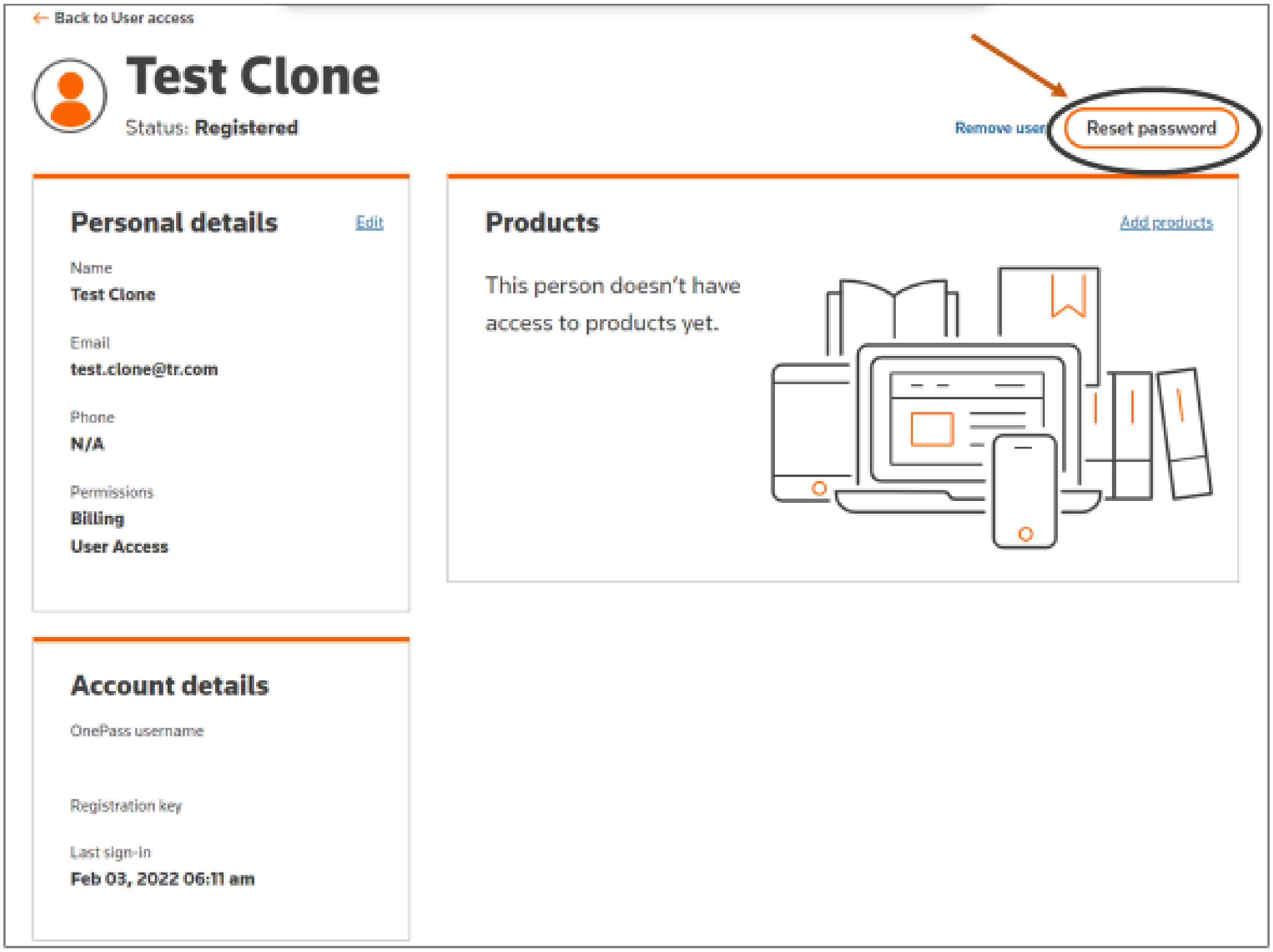


Reset Password for an Admin User

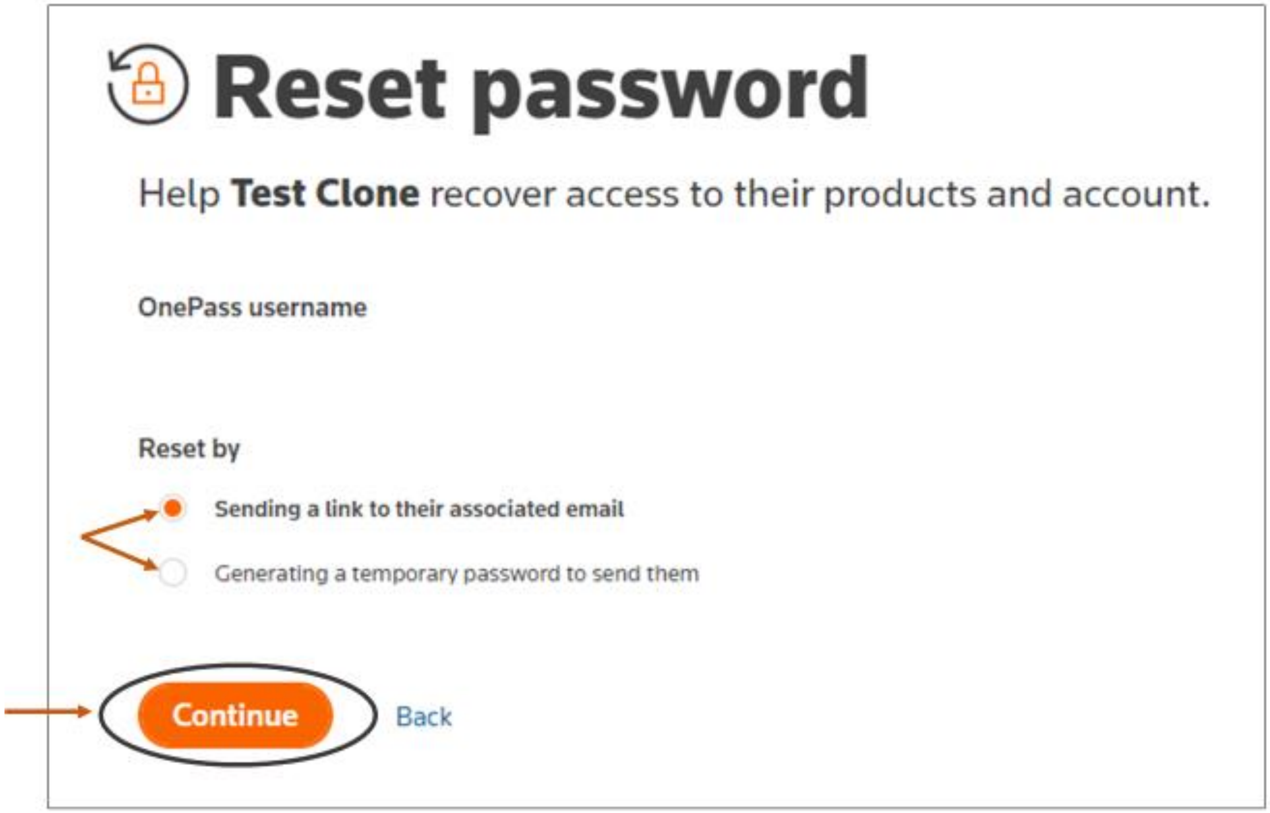
Navigate to the **User access** tab and select the **Admins** tab. Next, click the admin user's name.



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



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**.

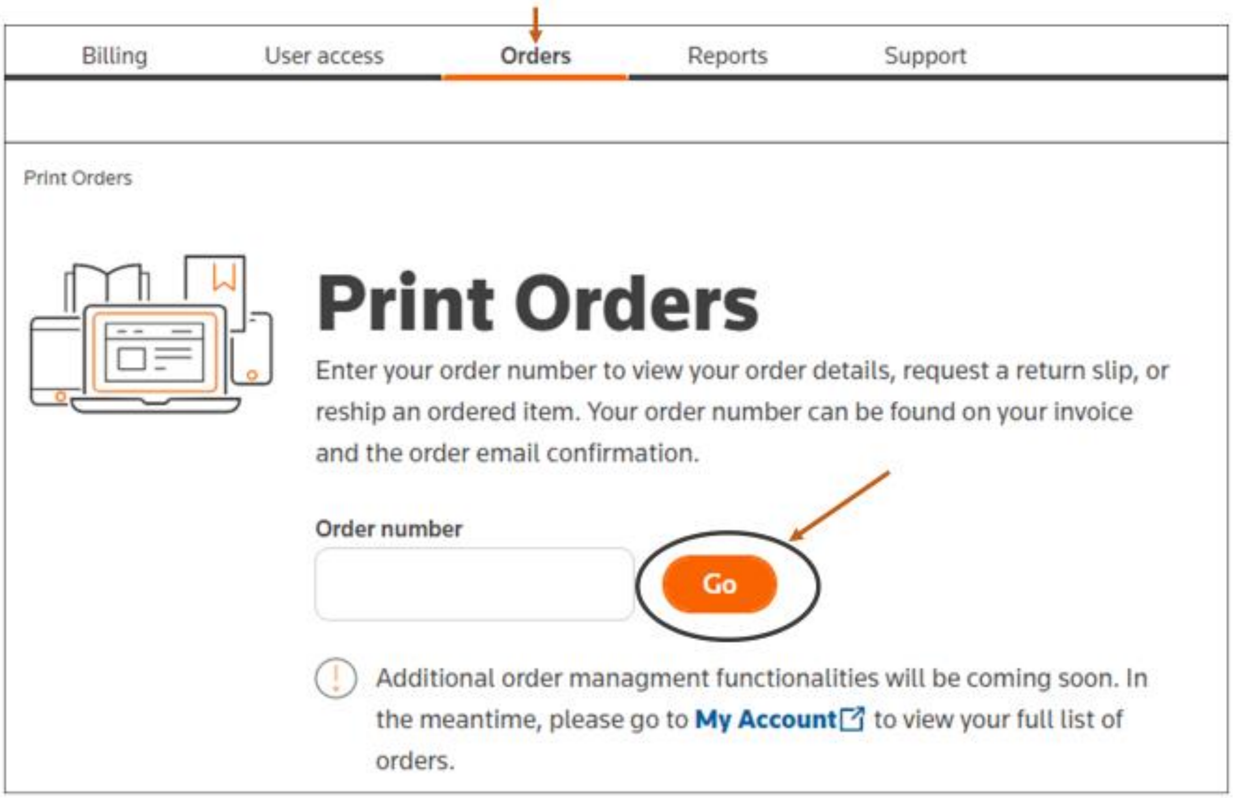


ORDERS

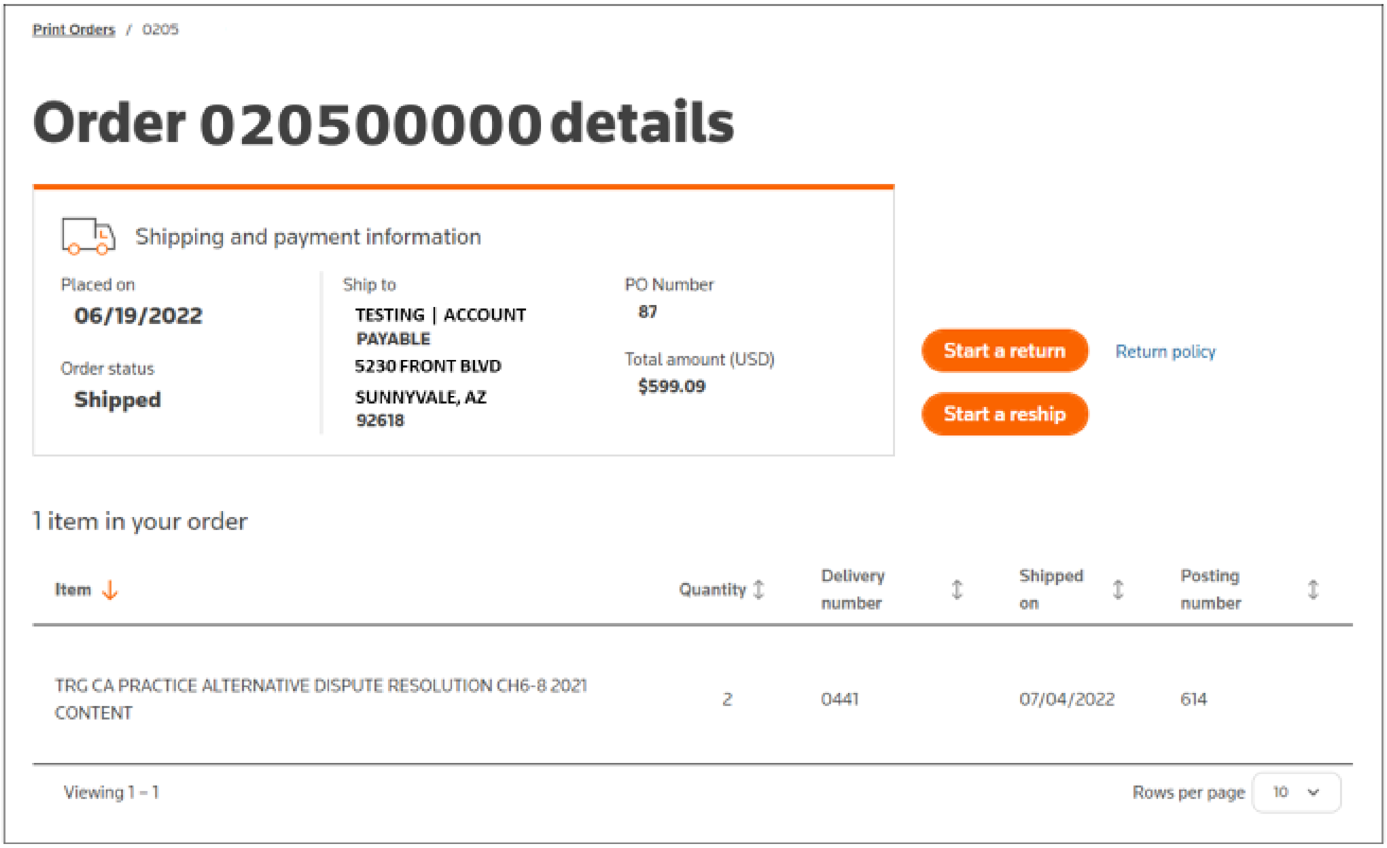
We anticipate the Print Order tasks shown in this section will be available in 2024.

View Print Order

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

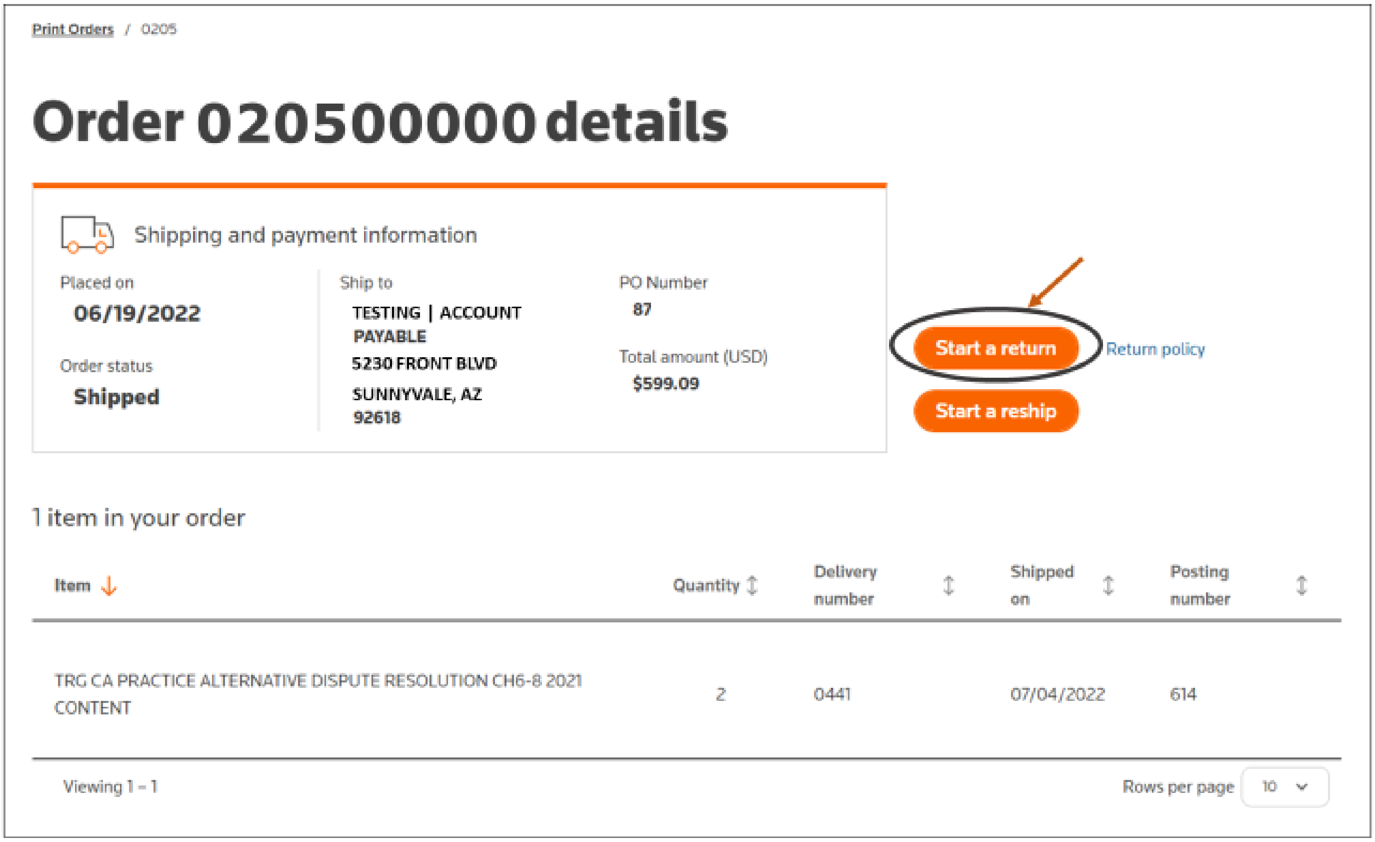


Then, view the Print Order details.

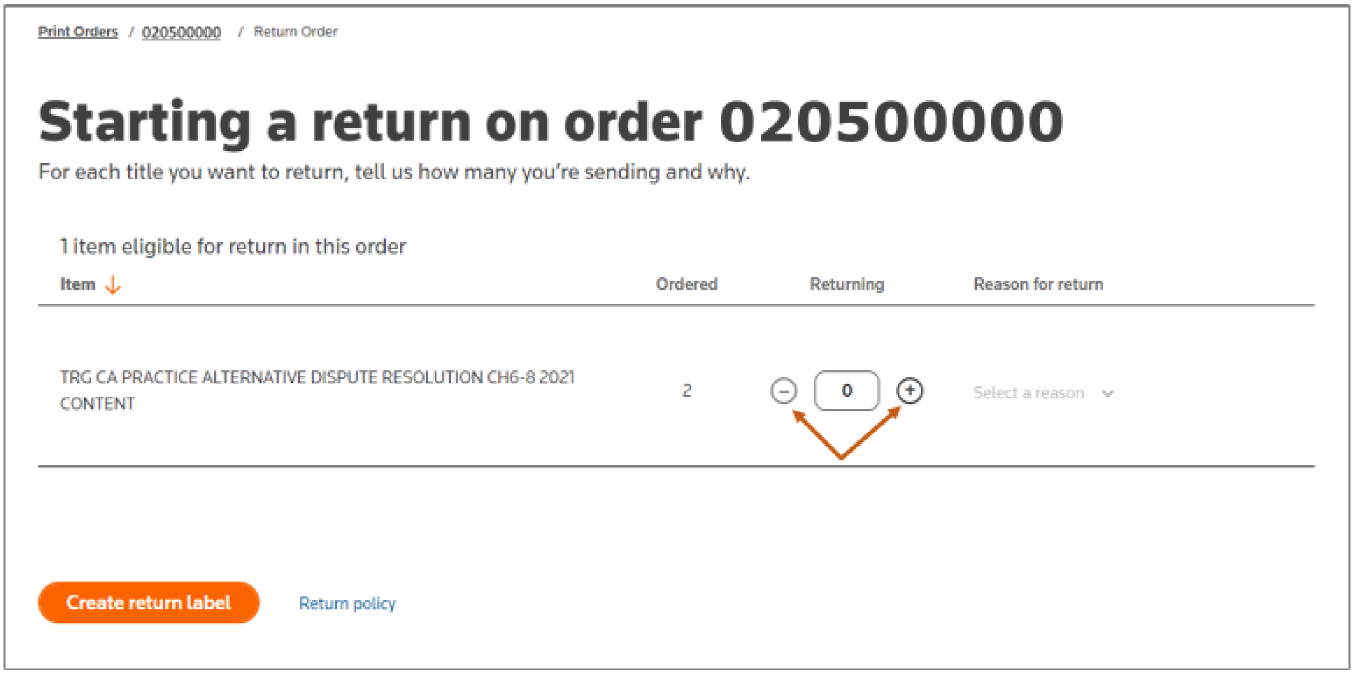


Returning Items (Start a return)

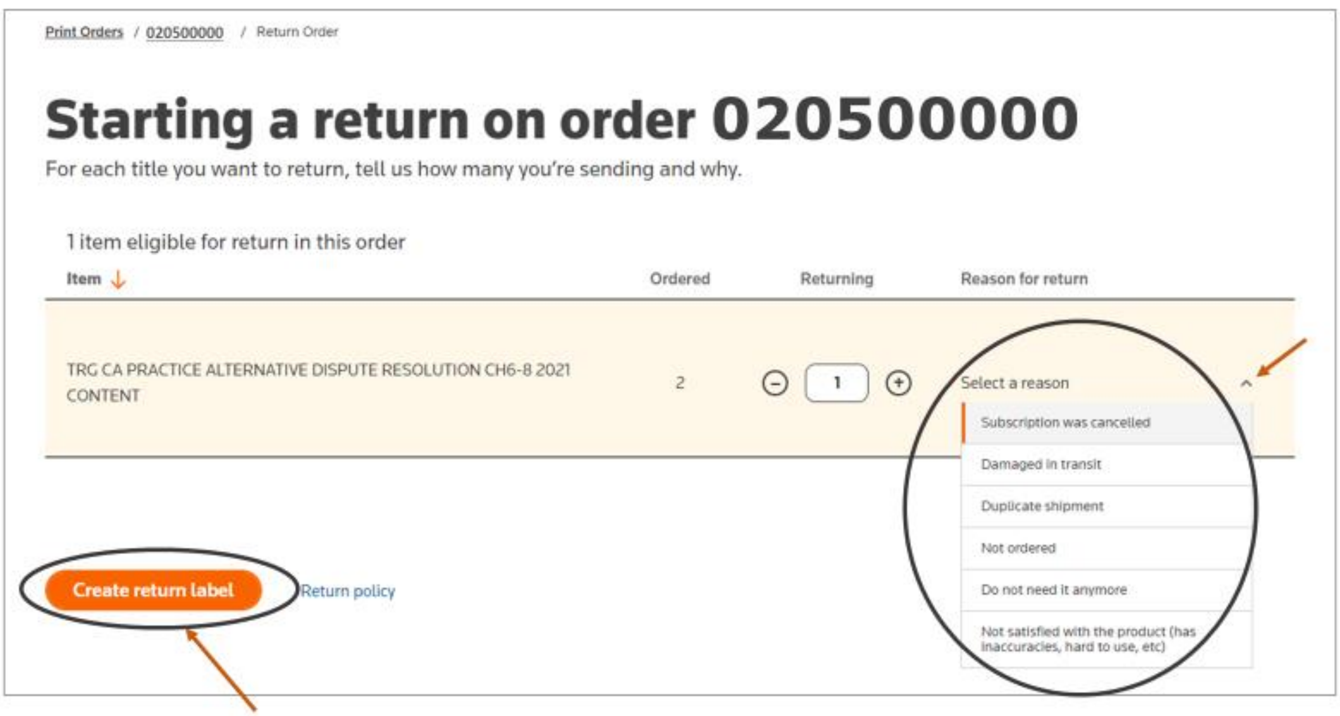
To return one or more items from an order, navigate to the relevant Order details page. Then, click **Start a return** on the right side.



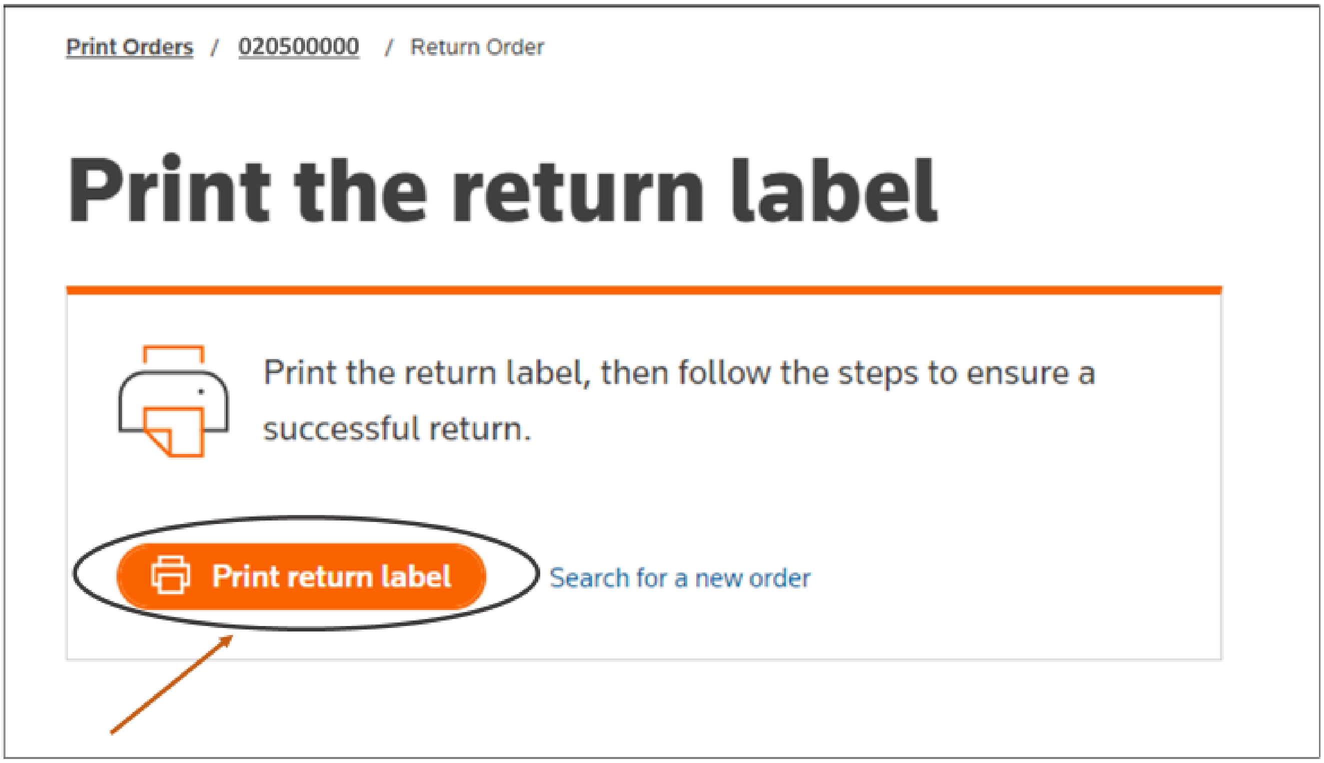
Next, use the plus and minus buttons to select the number of items you want to return.



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



Next, click **Print return label**.



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

From:
TESTING ACCOUNT PAYABLE
5230 FRONT BLVD
SUNNYVALE, AZ 92618

Box______of______

Delivery number: 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

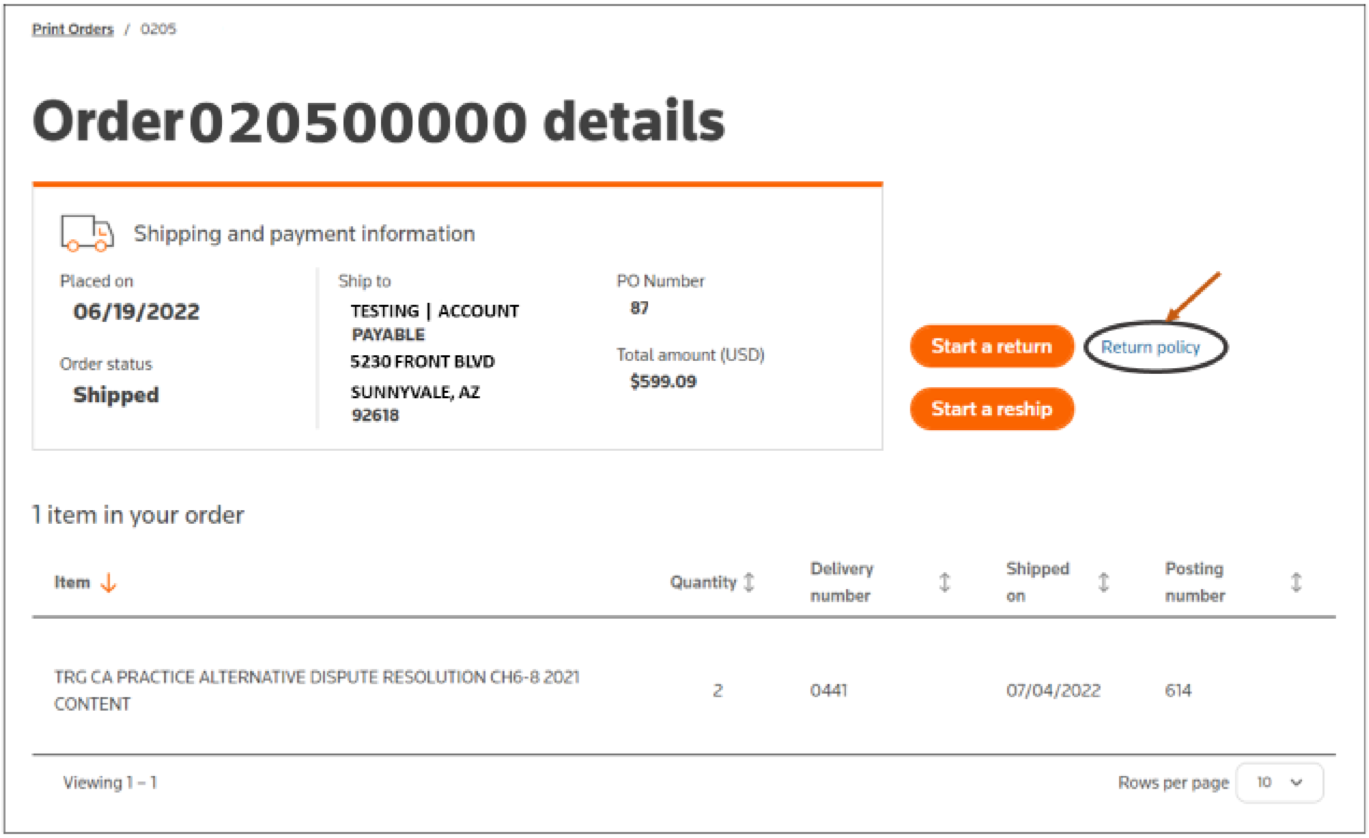
Printed on 07/26/2022 at 2:38:57 pm

Order number: 020500000

Delivery number	Description	Returning	Reason
0441	TRG CA PRACTICE ALTERNATIVE DISPUTE...	1	Damaged in transit

Return Policy

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



Next, view the return policy terms and conditions.

Returns: Terms and conditions

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

Timing

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

Exclusions

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

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

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

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

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

Costs

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

Packing

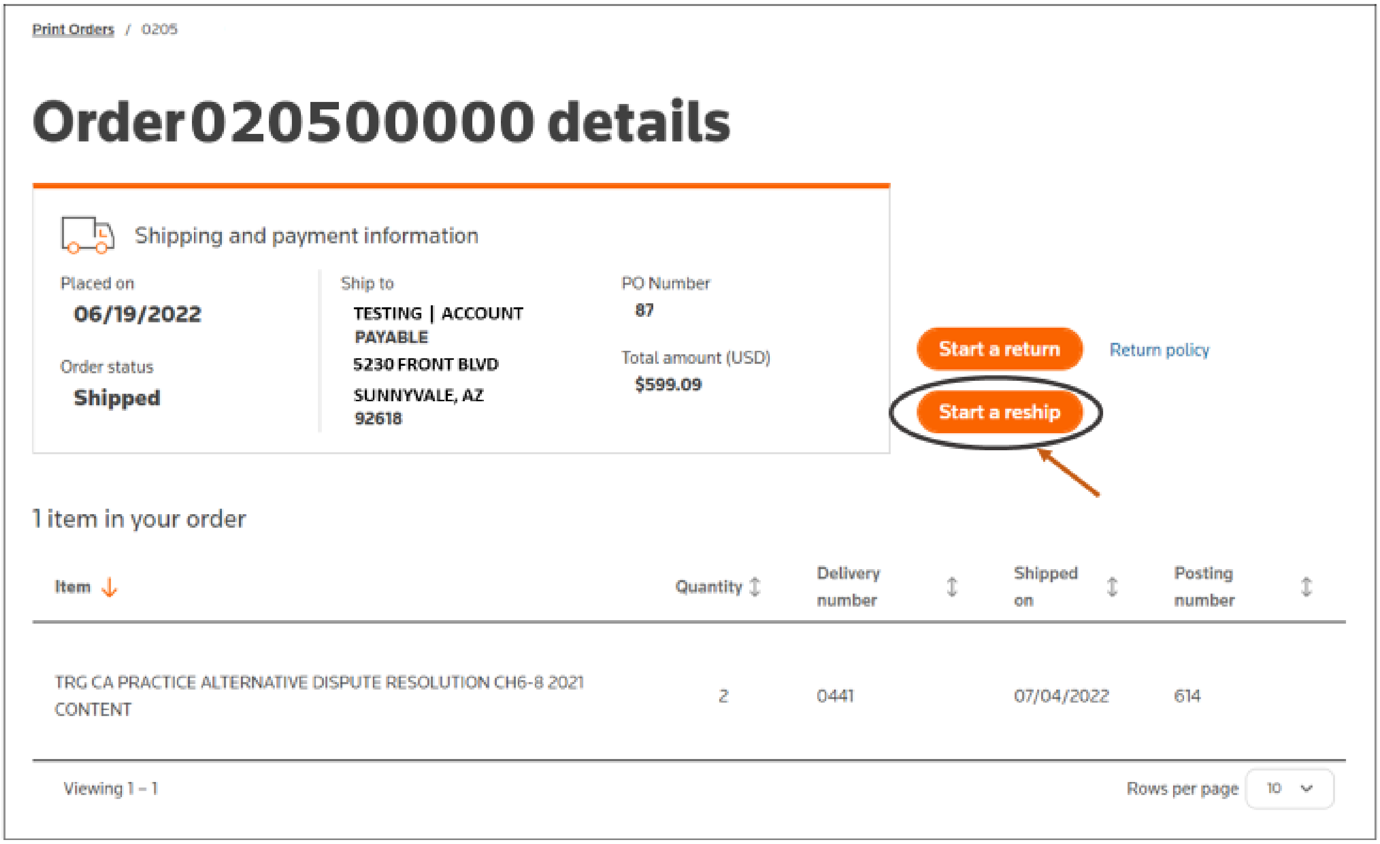
For timely processing, place the returning products in their original packaging. Make sure to enclose a copy of the delivery slip or order invoice along with a brief explanation of the reason for the return. Use a shipping method with tracking, and add insurance in the amount of the purchased value.

Status

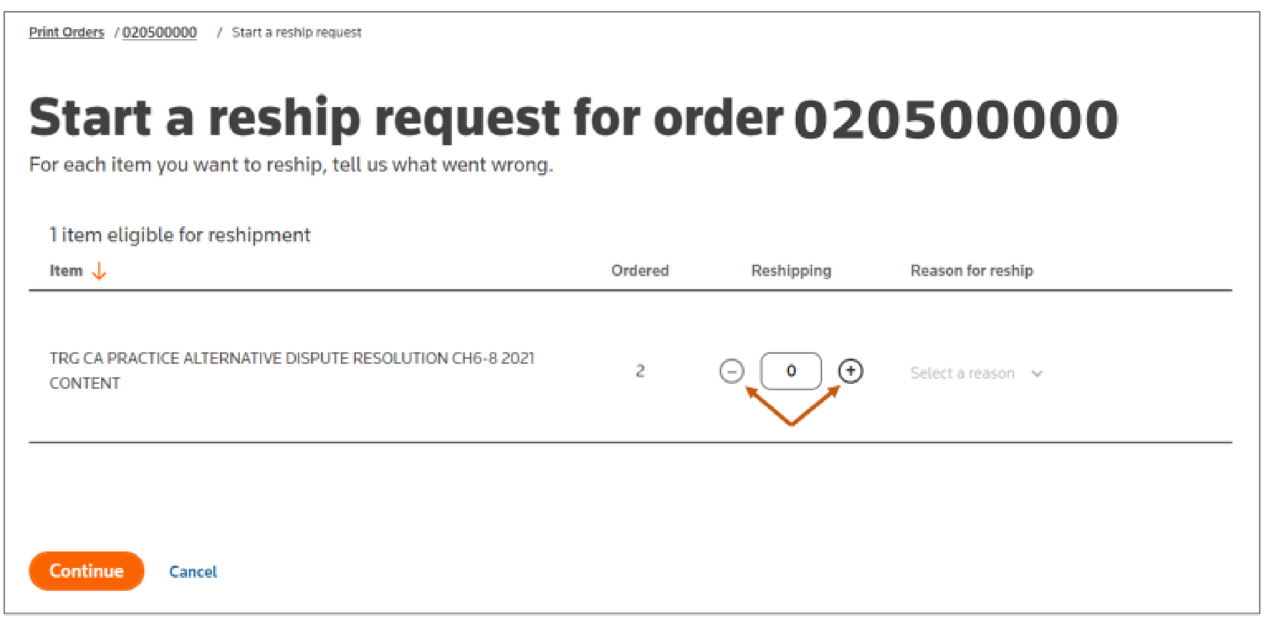
You can verify our receipt of your return and any credit applied in the Returns History section of My Account.

Reshipping Items (Start a Reship Request)

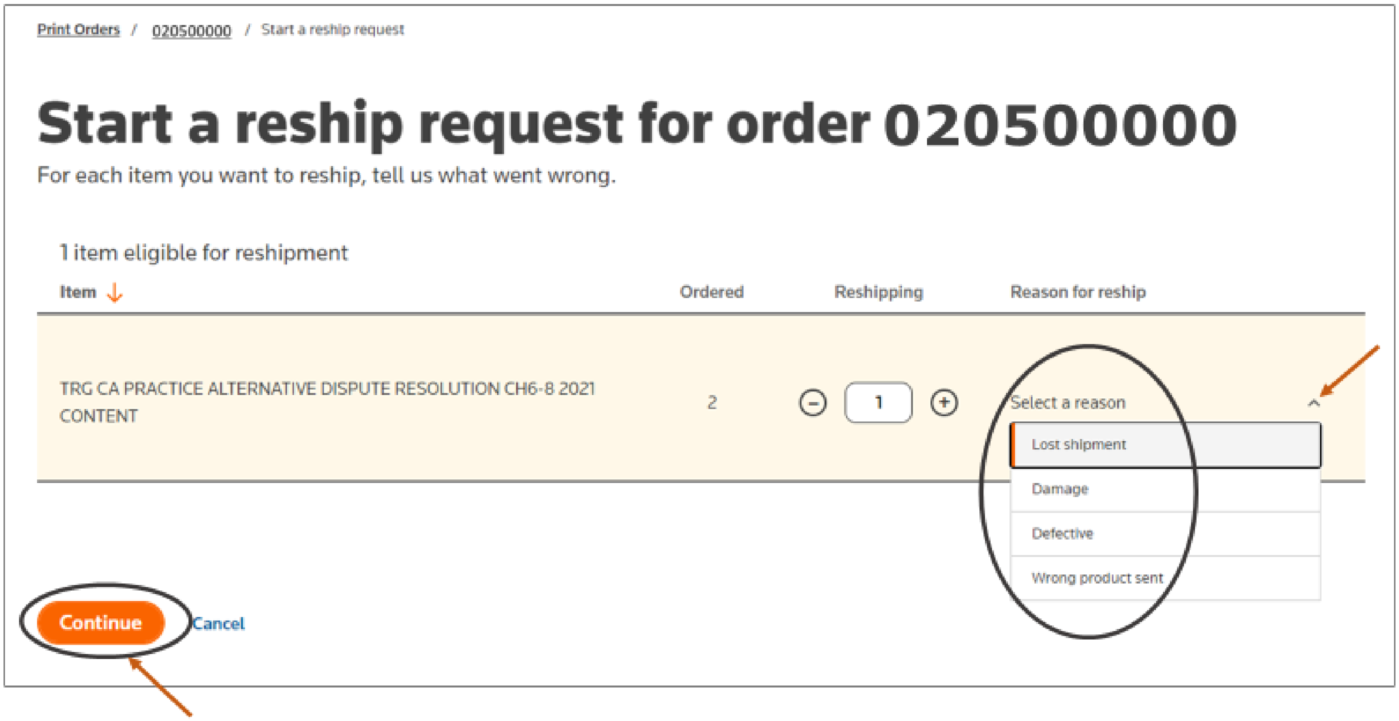
To request the reshipment of one or more items from an order, navigate to the relevant Order details page. Next, click **Start a reship**.



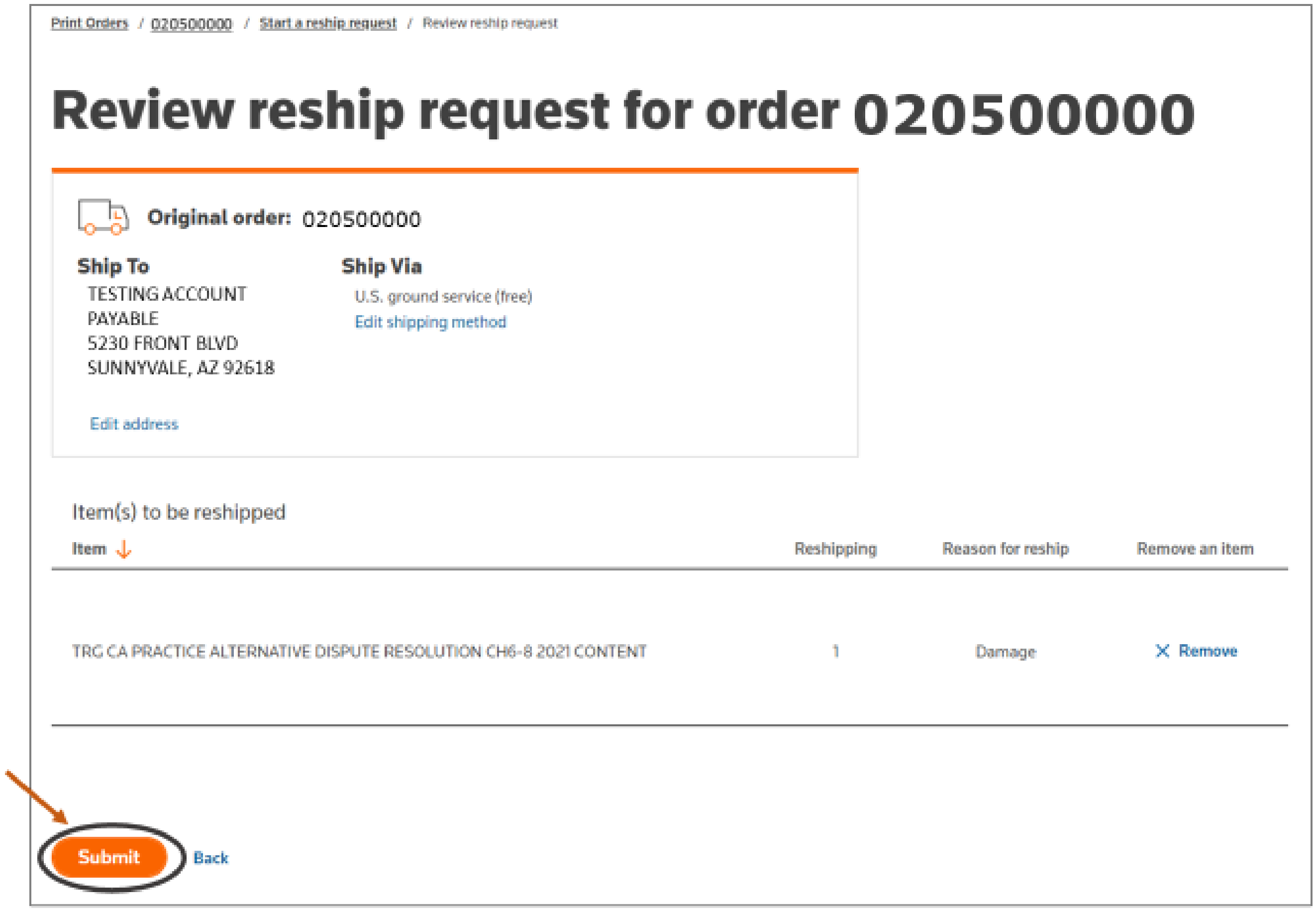
Next, use the plus and minus buttons to select the number of items you want reshipped.



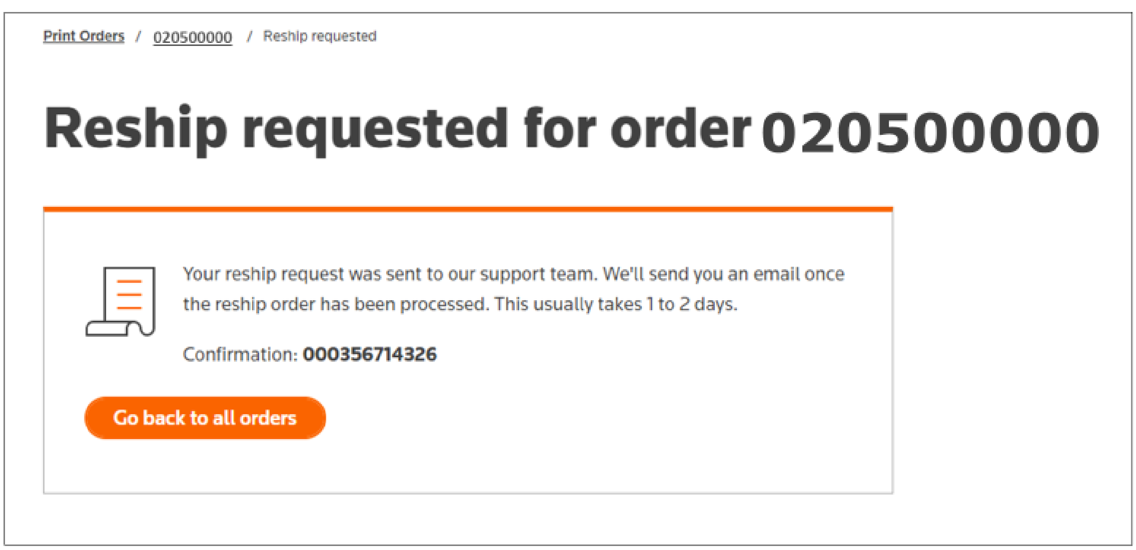
Next, click the carrot next to **Select a reason** and select the reason for requesting the reshipment from the dropdown menu. Then, click **Continue.**



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**.

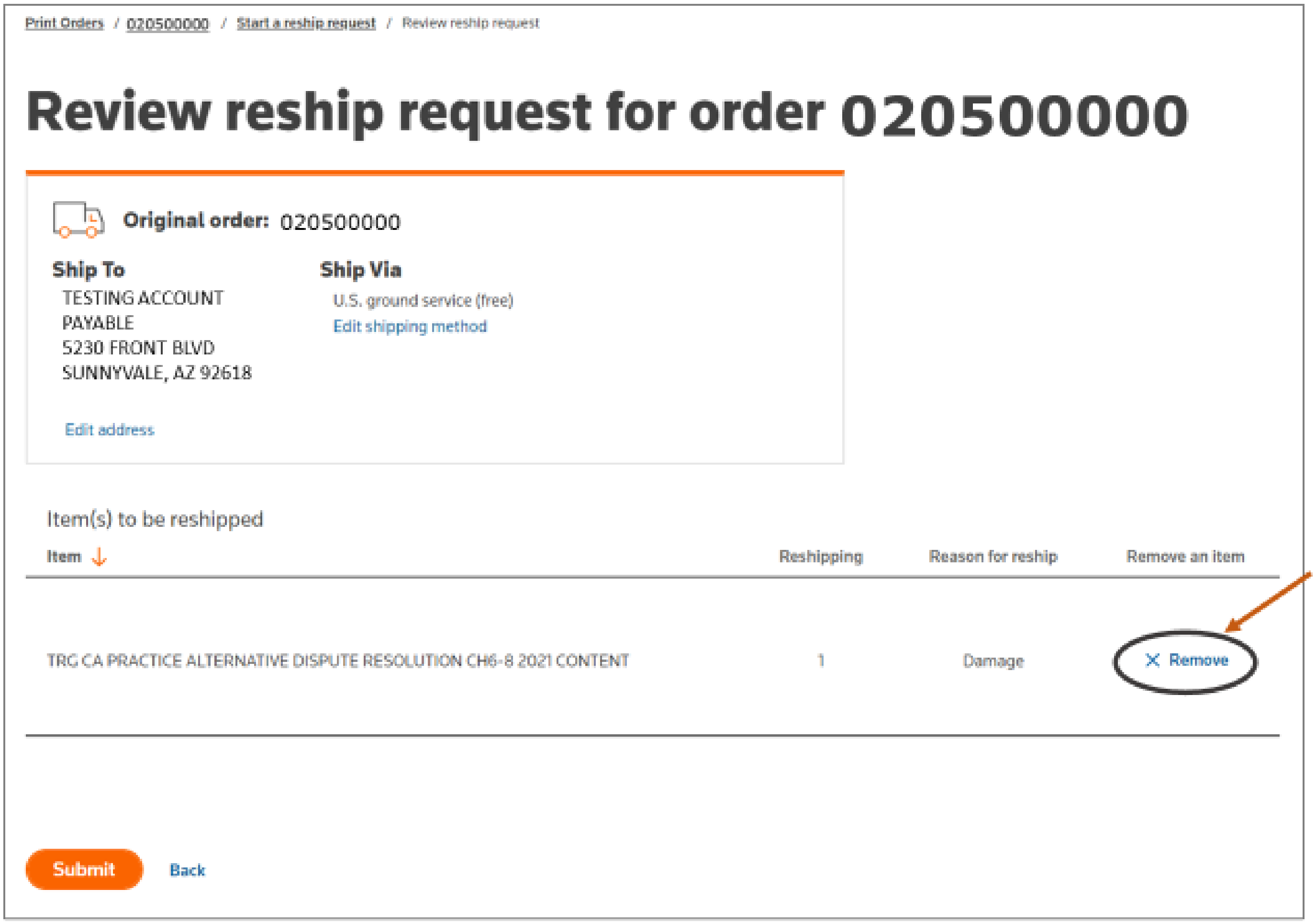


After clicking Submit, you will see a confirmation box similar to the below.



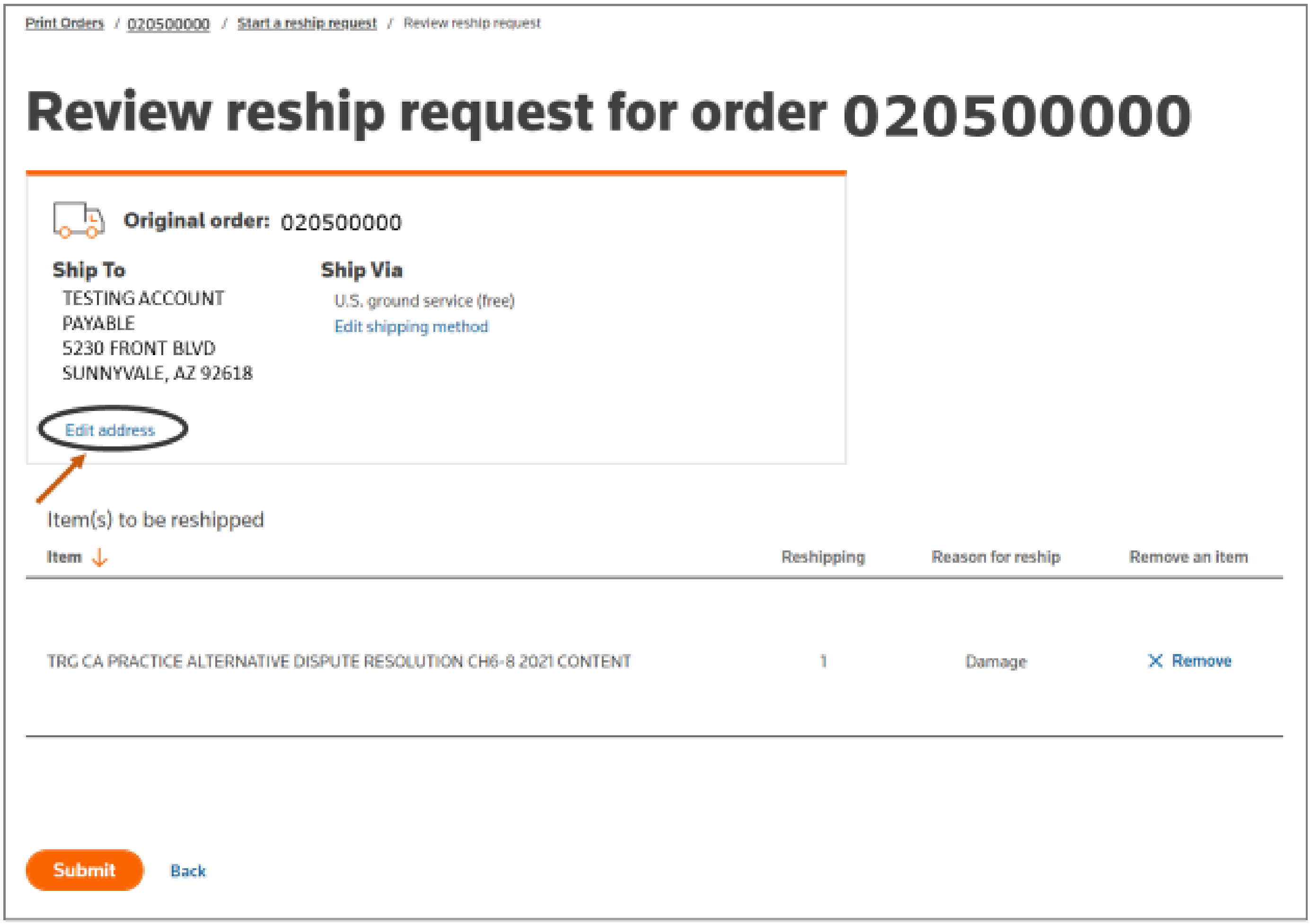
Remove an Item

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.

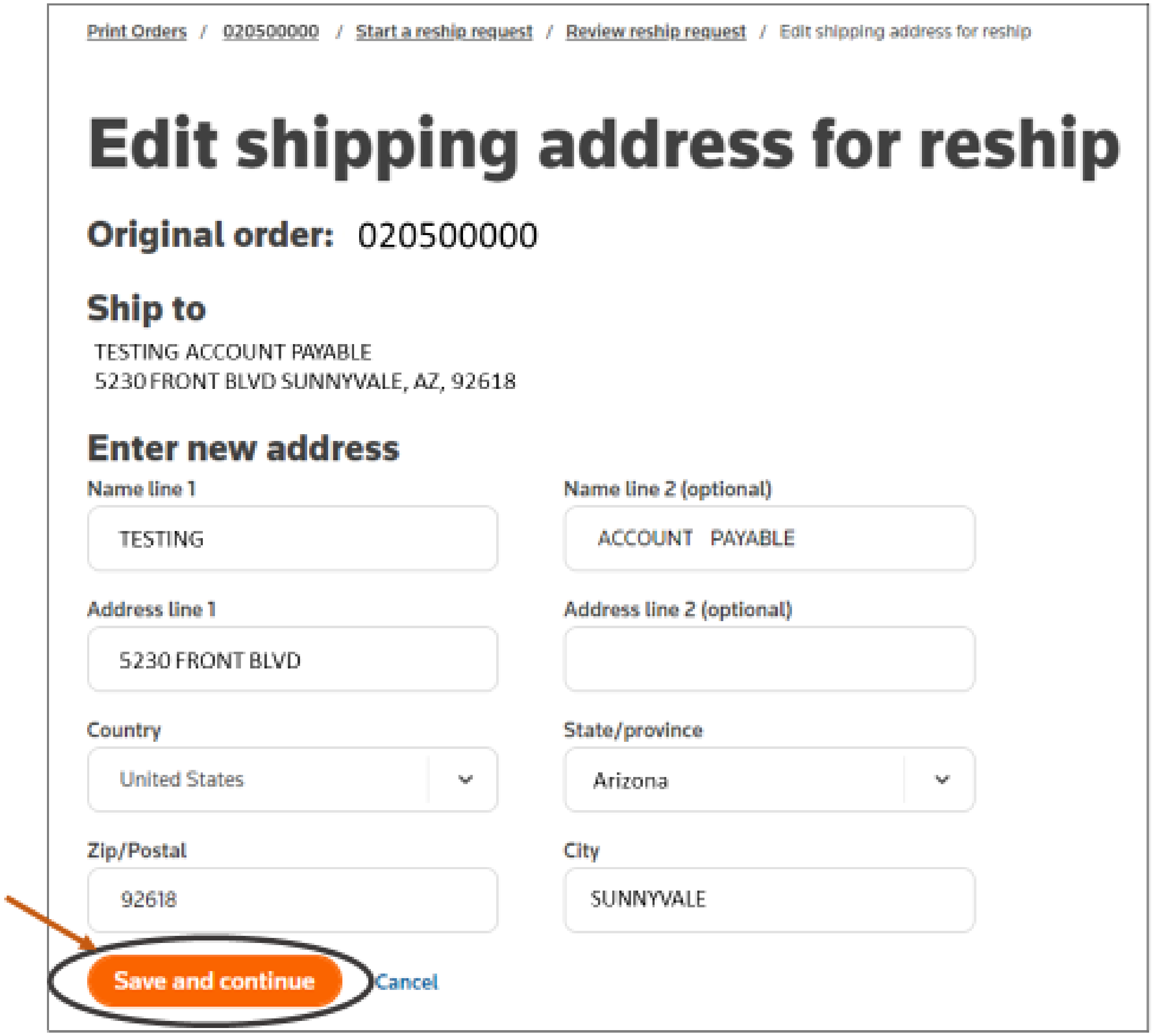


Edit Shipping Address

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

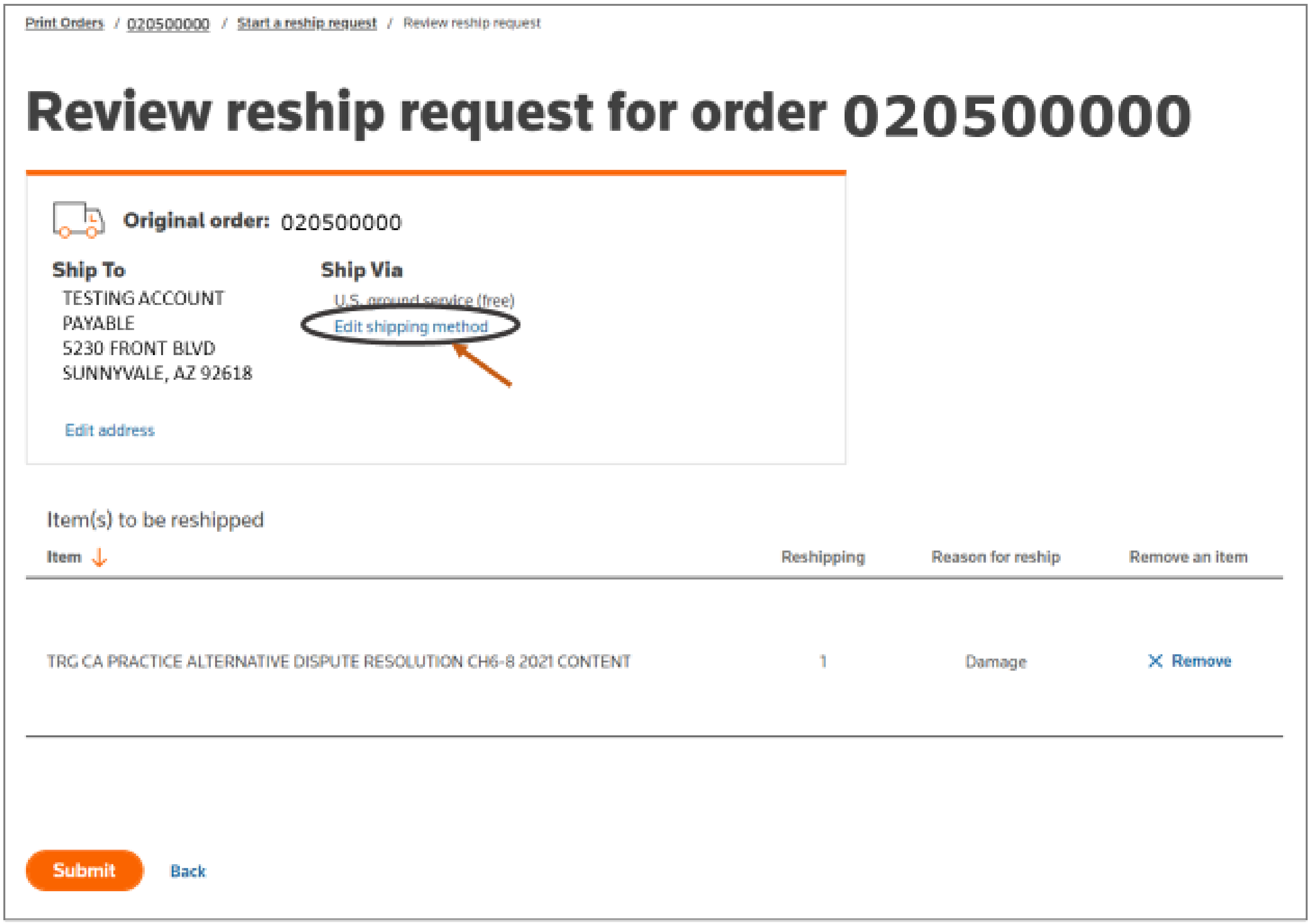


Next, make any necessary changes to the shipping name and address. Then, click **Save and continue**.

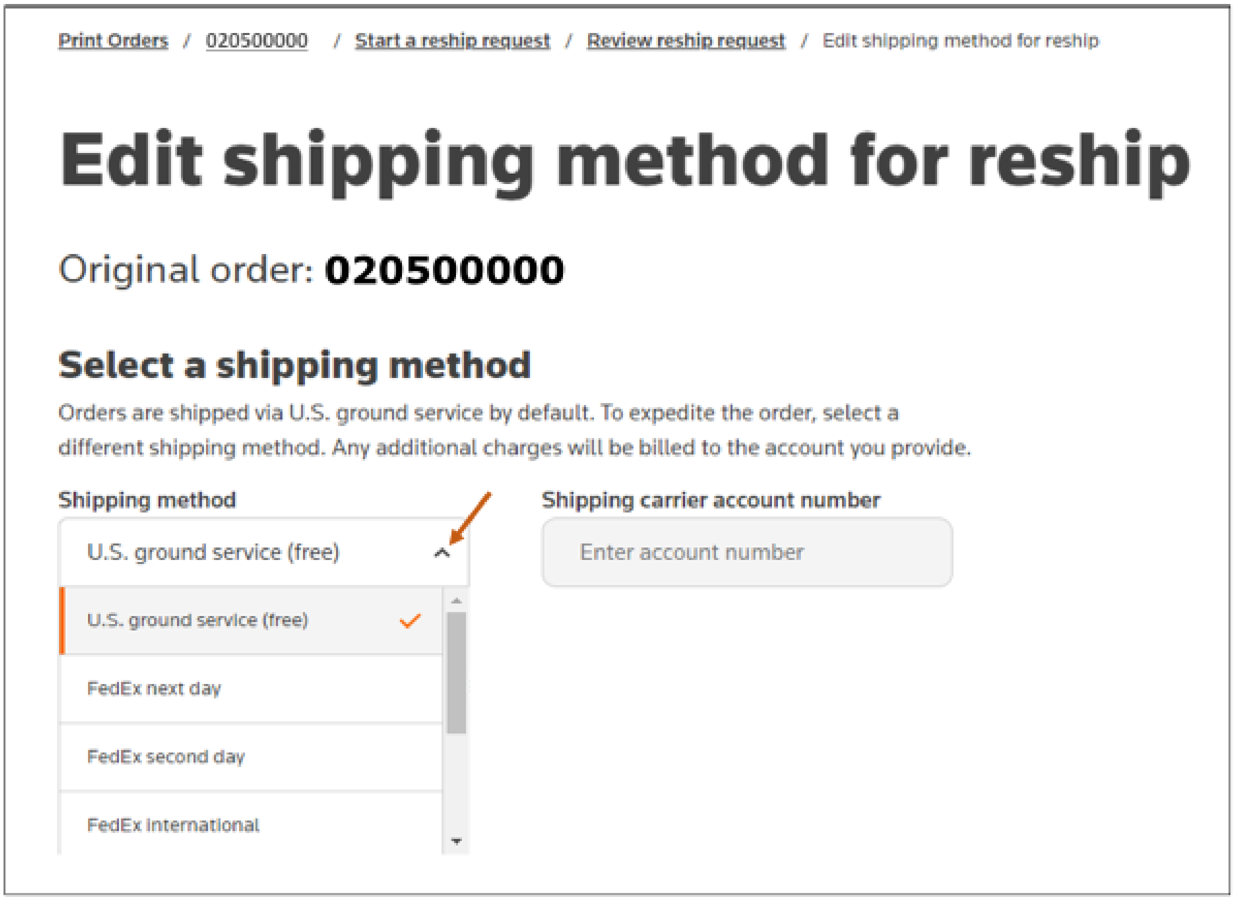


Change Shipping Method

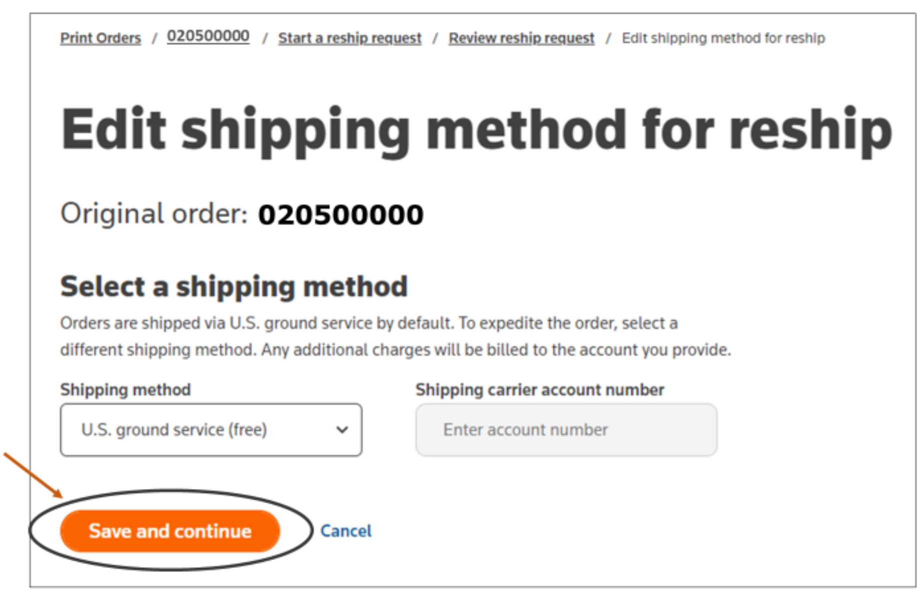
To change the shipping method, navigate to the review reship request details page and click **Edit shipping method**.



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



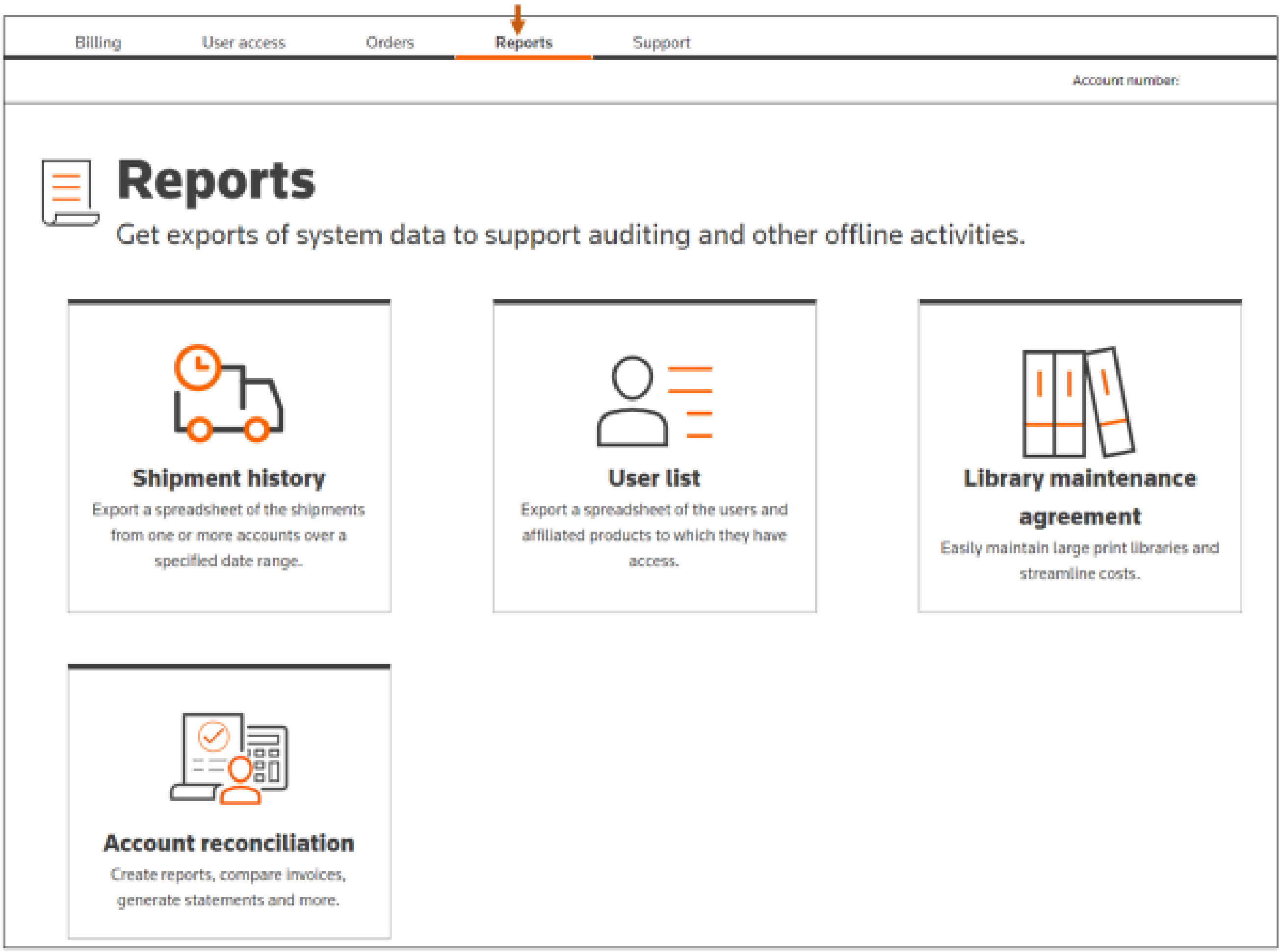
Then, click **Save and continue**.



REPORTS

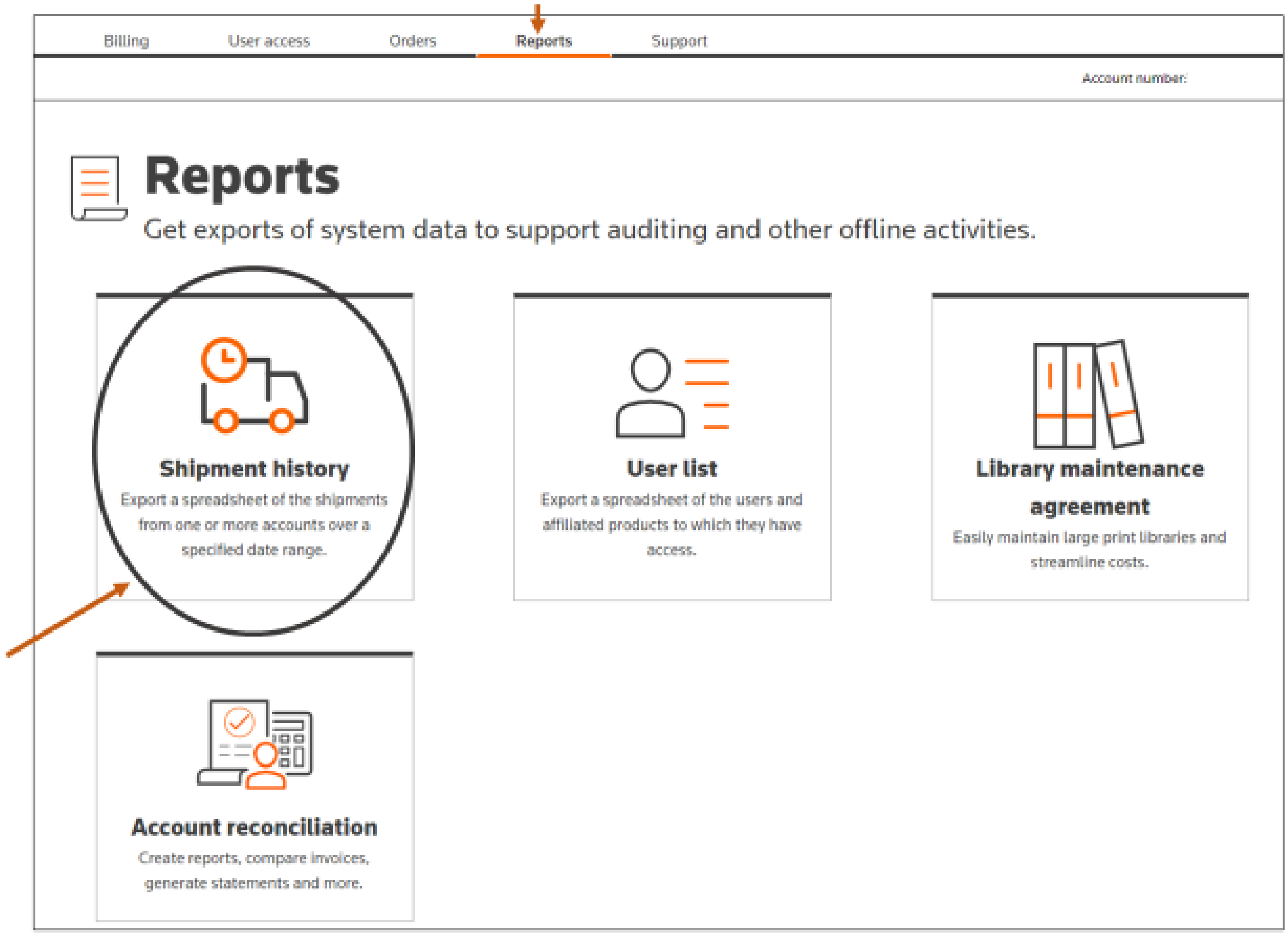
We anticipate that the reports shown in this section will be available in 2024.

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

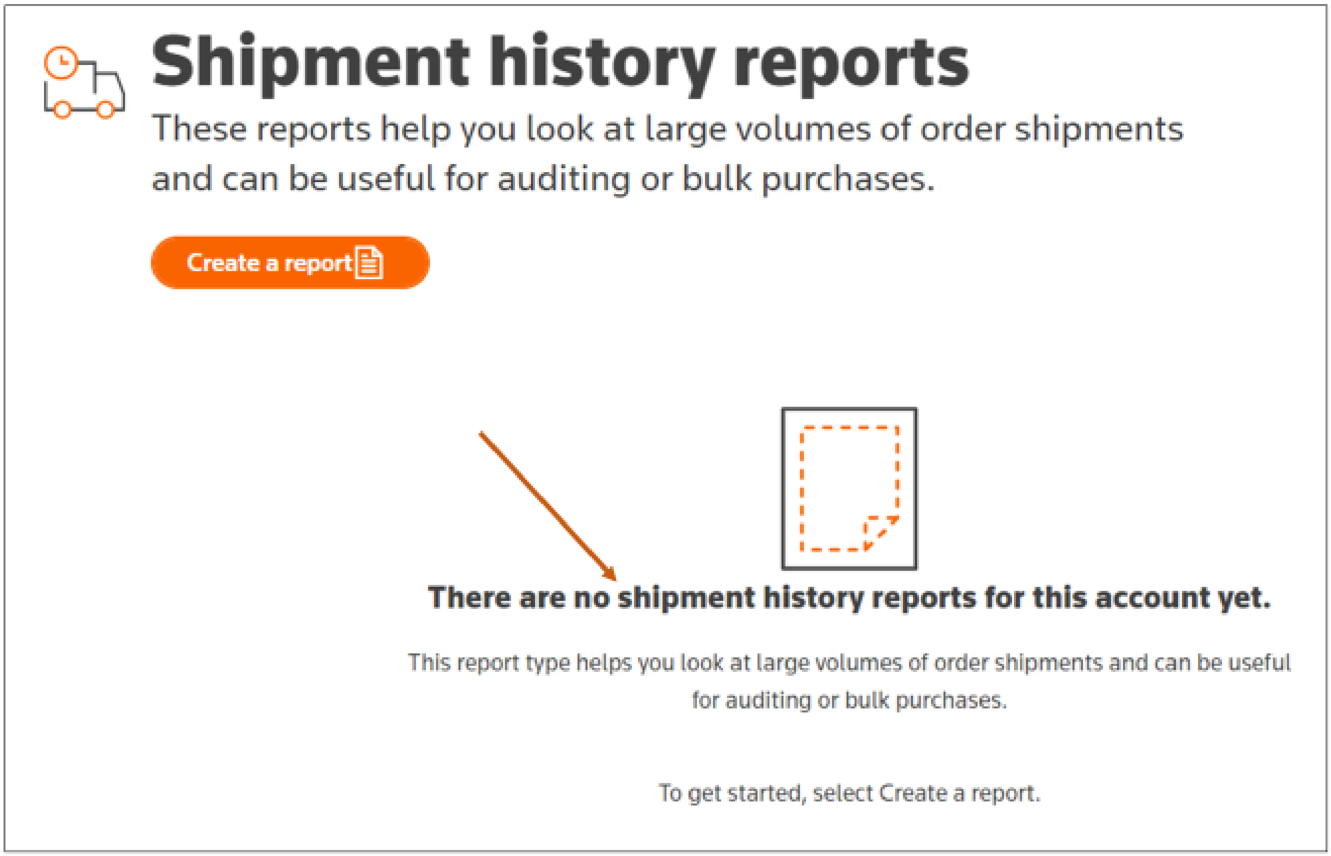


Shipping History Report

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

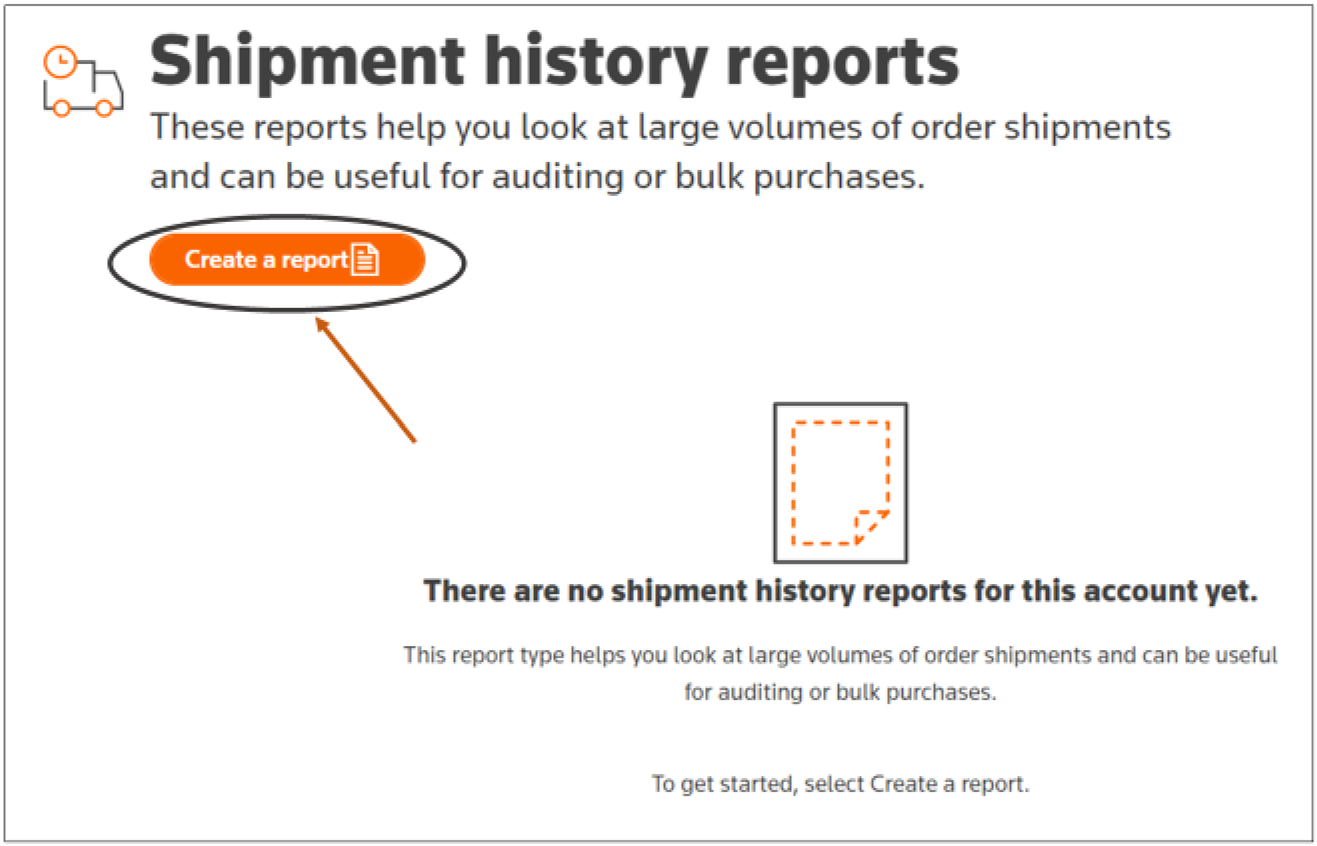


A list of previously created shipping reports will appear in a chart. If no prior shipping history report exists, you will see a message similar to the one below.

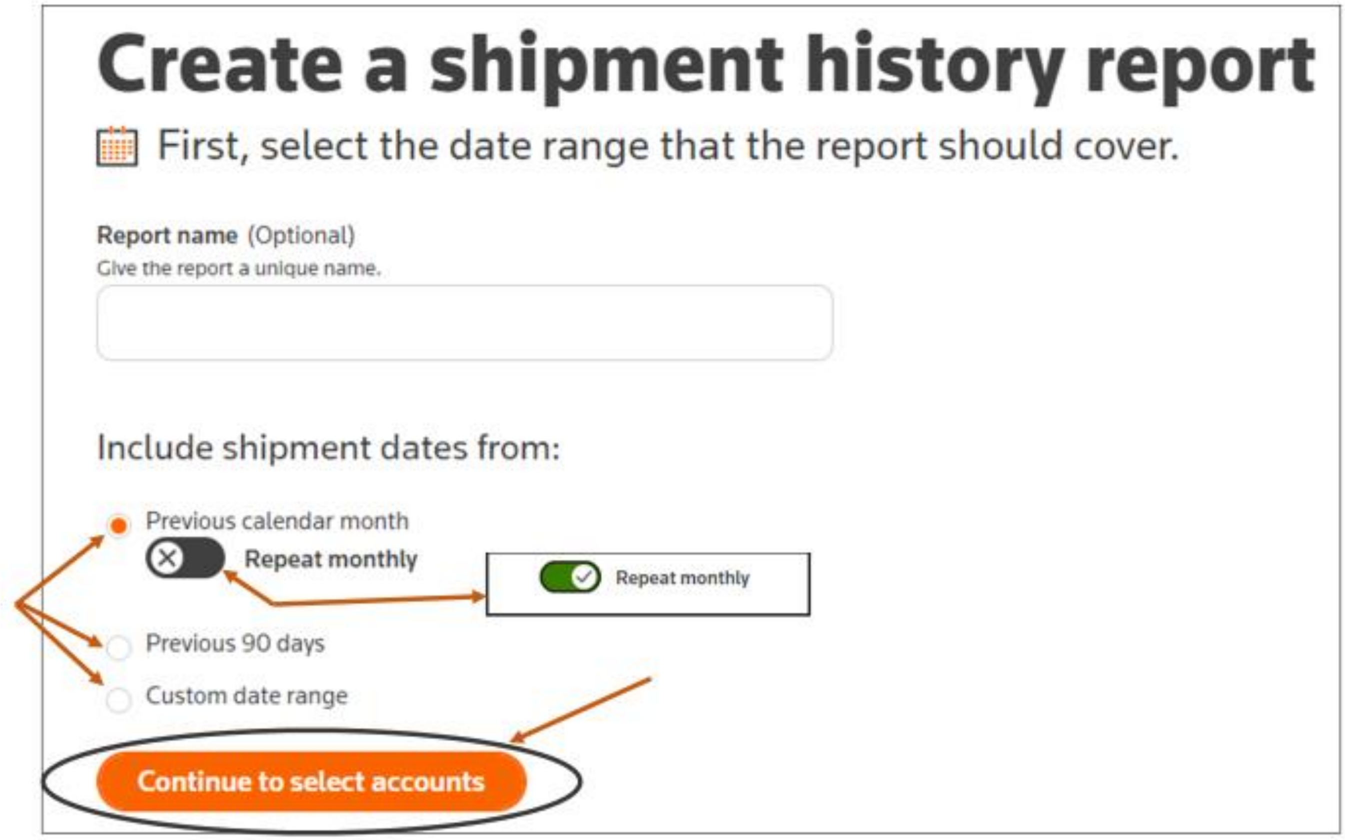


Create a Shipping History Report

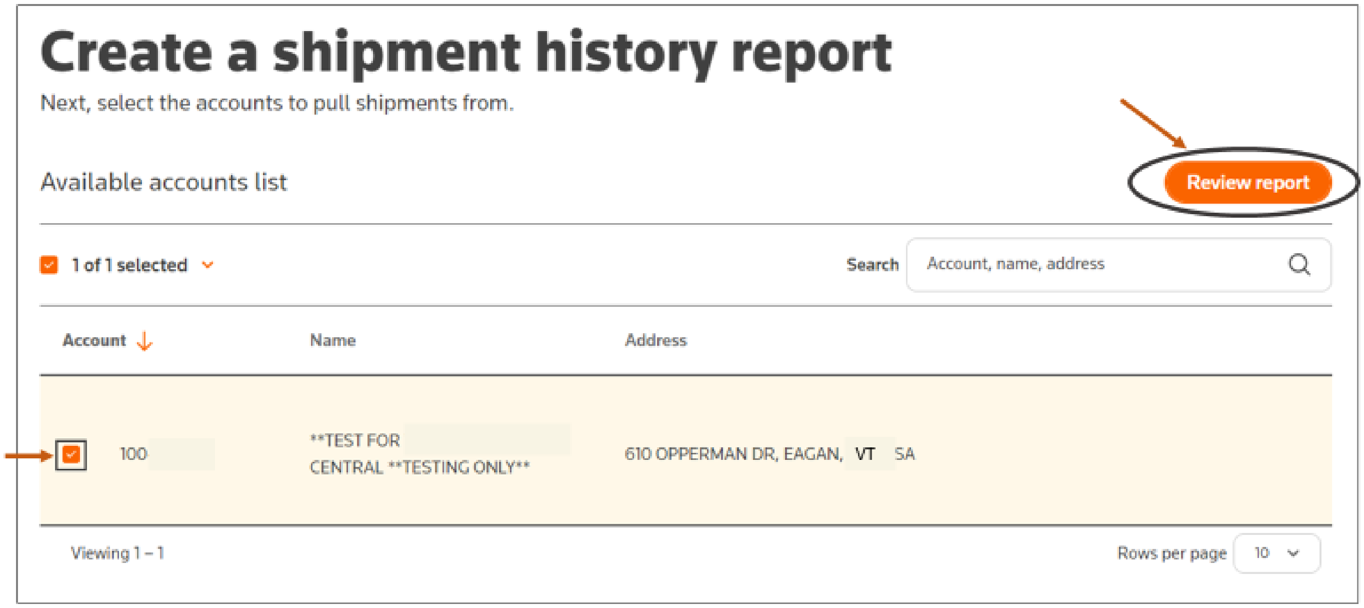
From the Shipment history reports page, click **Create a report**.



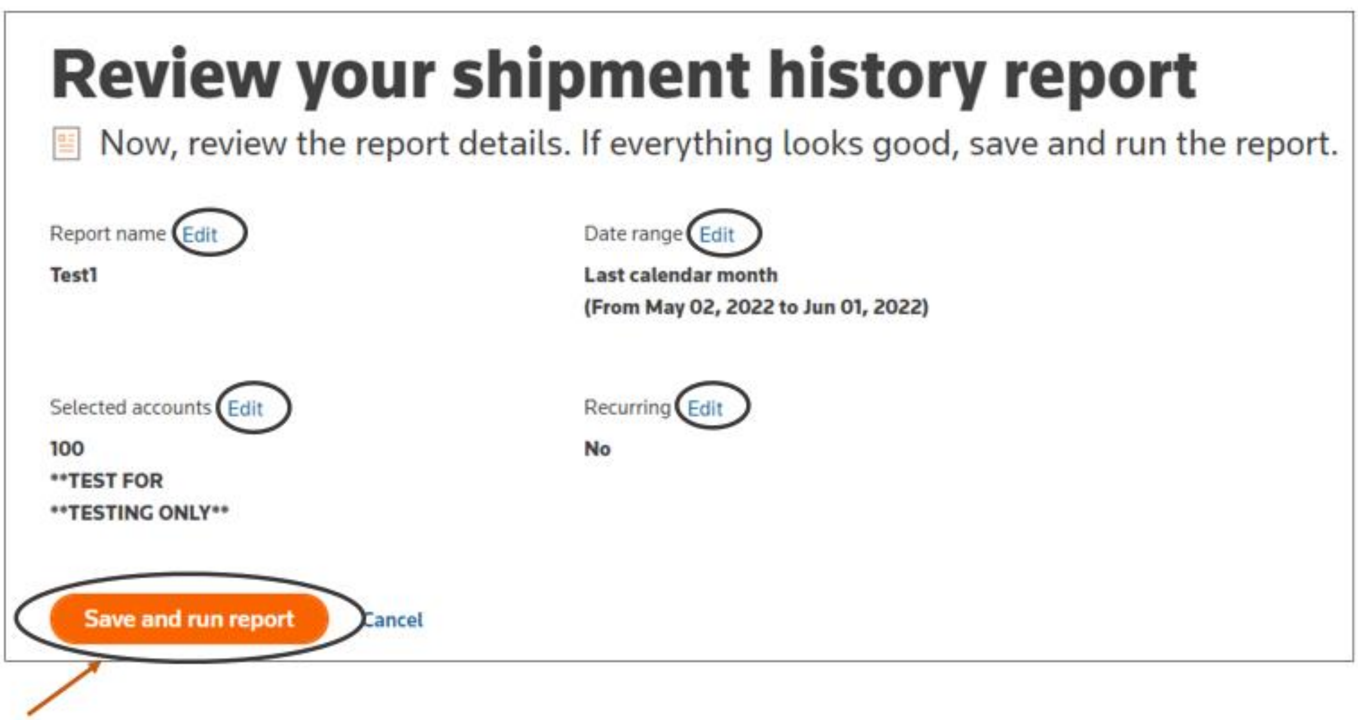
Next, provide a name for the shipping report, if desired, and choose the dates for the report. If you want to run the same report on a monthly basis, click the button next to **Repeat monthly** so it appears green with a check mark. Then, click **Continue to select accounts**. before clicking Continue.



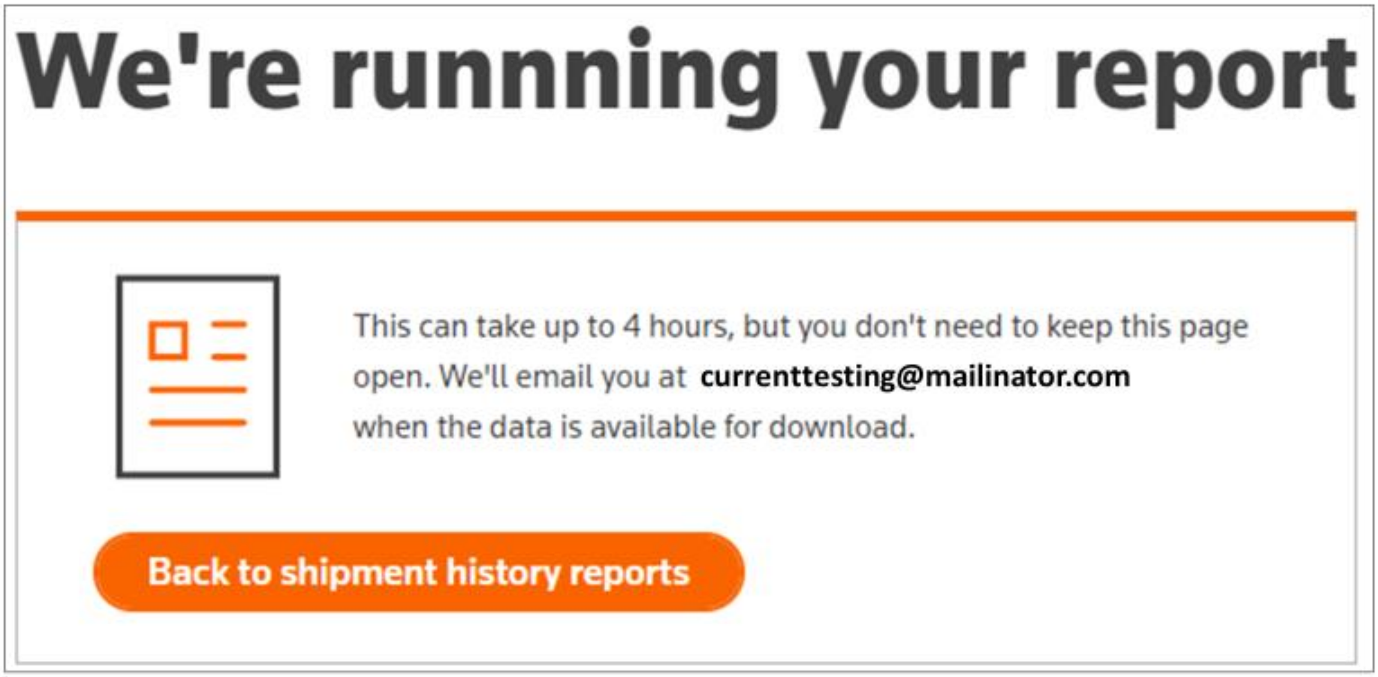
Next, select the accounts on which you want to run a report. Then, click **Review report**.



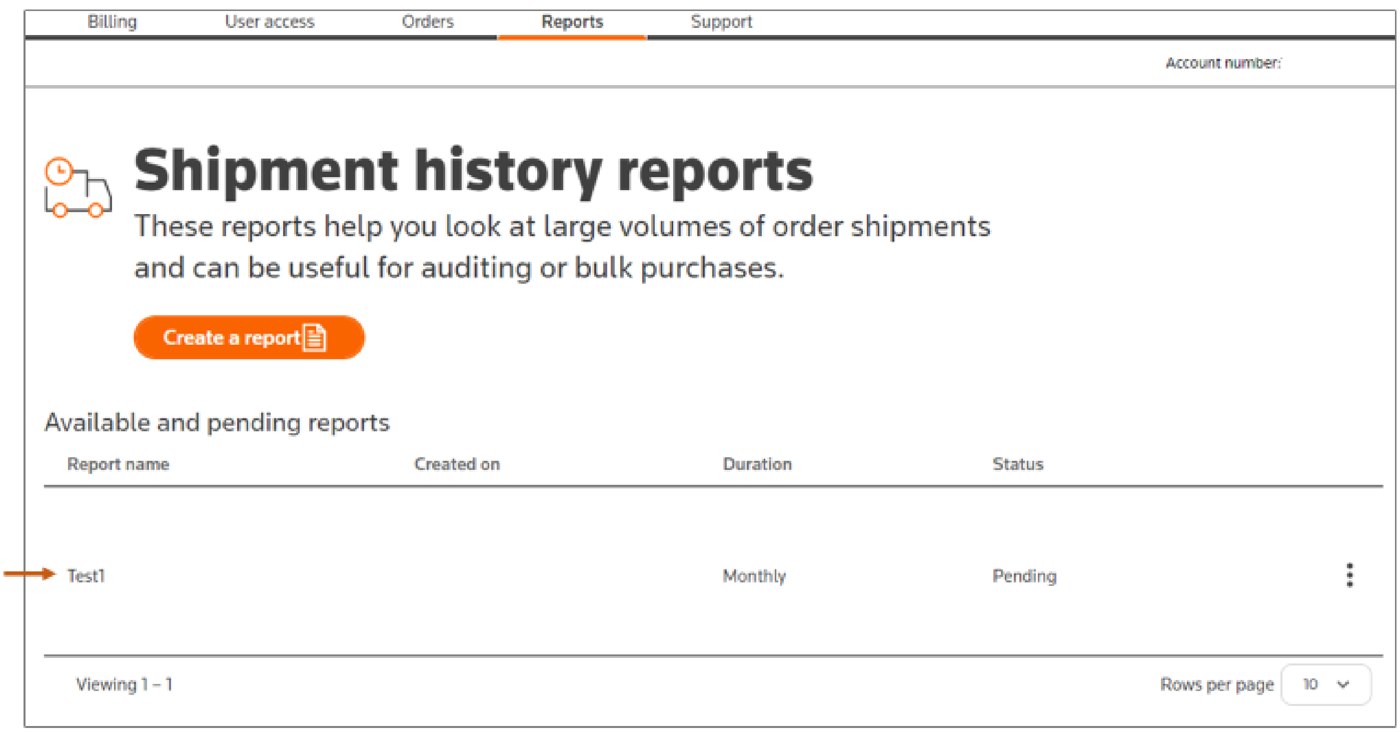
To make any edits to the report name, selected accounts, date range or recurring status, click **Edit** next to the relevant change. Then, enter the desired changes. When the report details are correct, click **Save and run report**.



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



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.

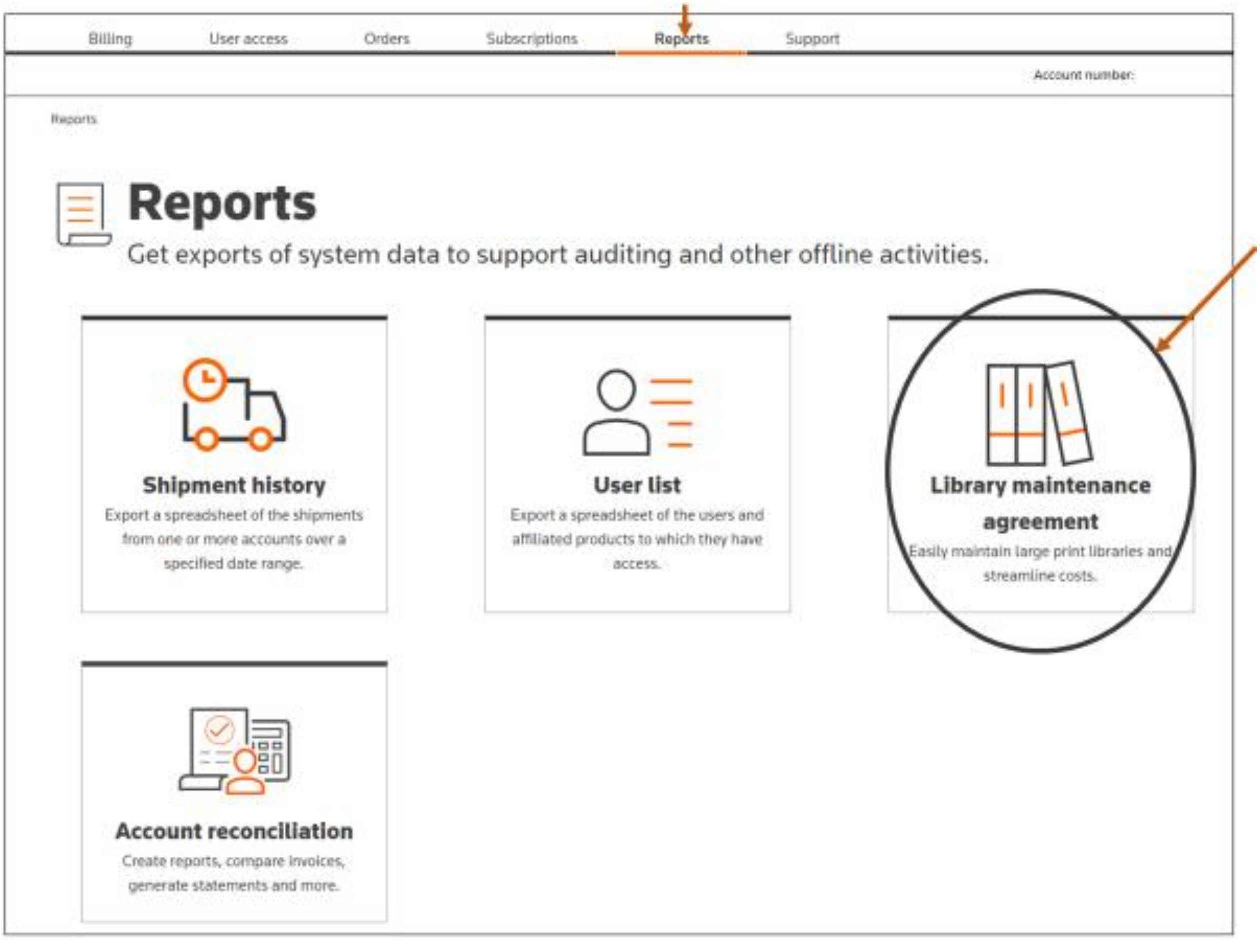


User List Report

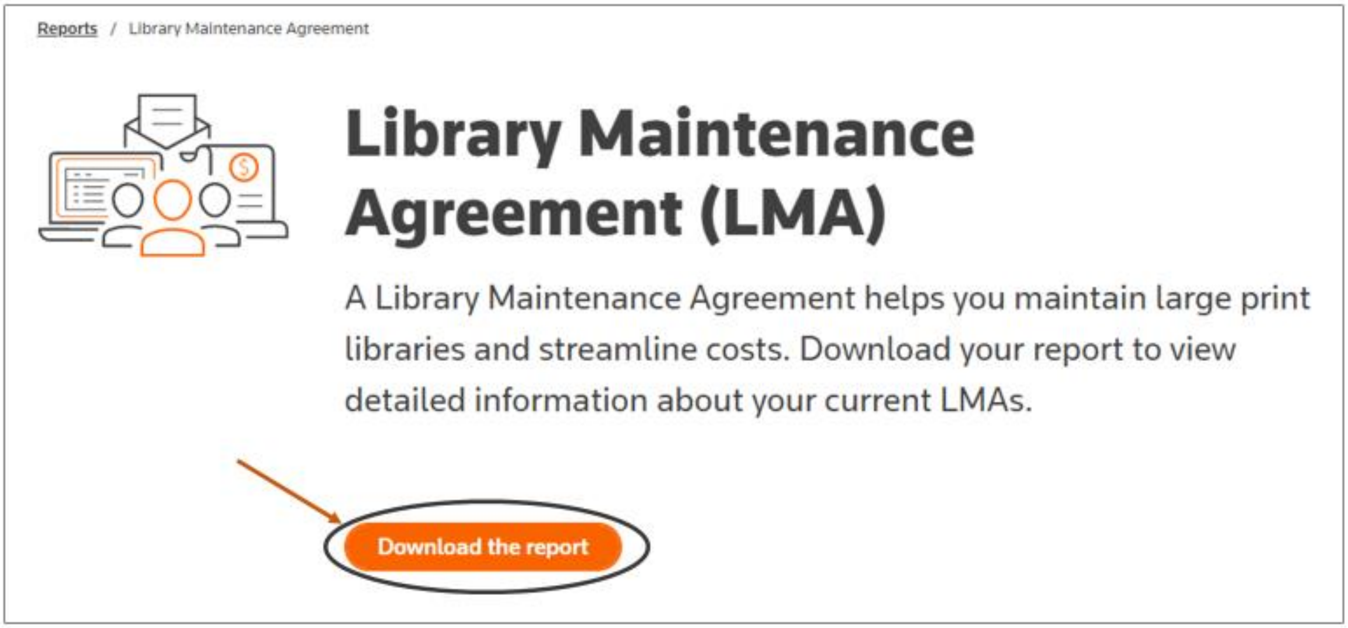
See section View users: Get a Report of Users.

Library Maintenance Agreements

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

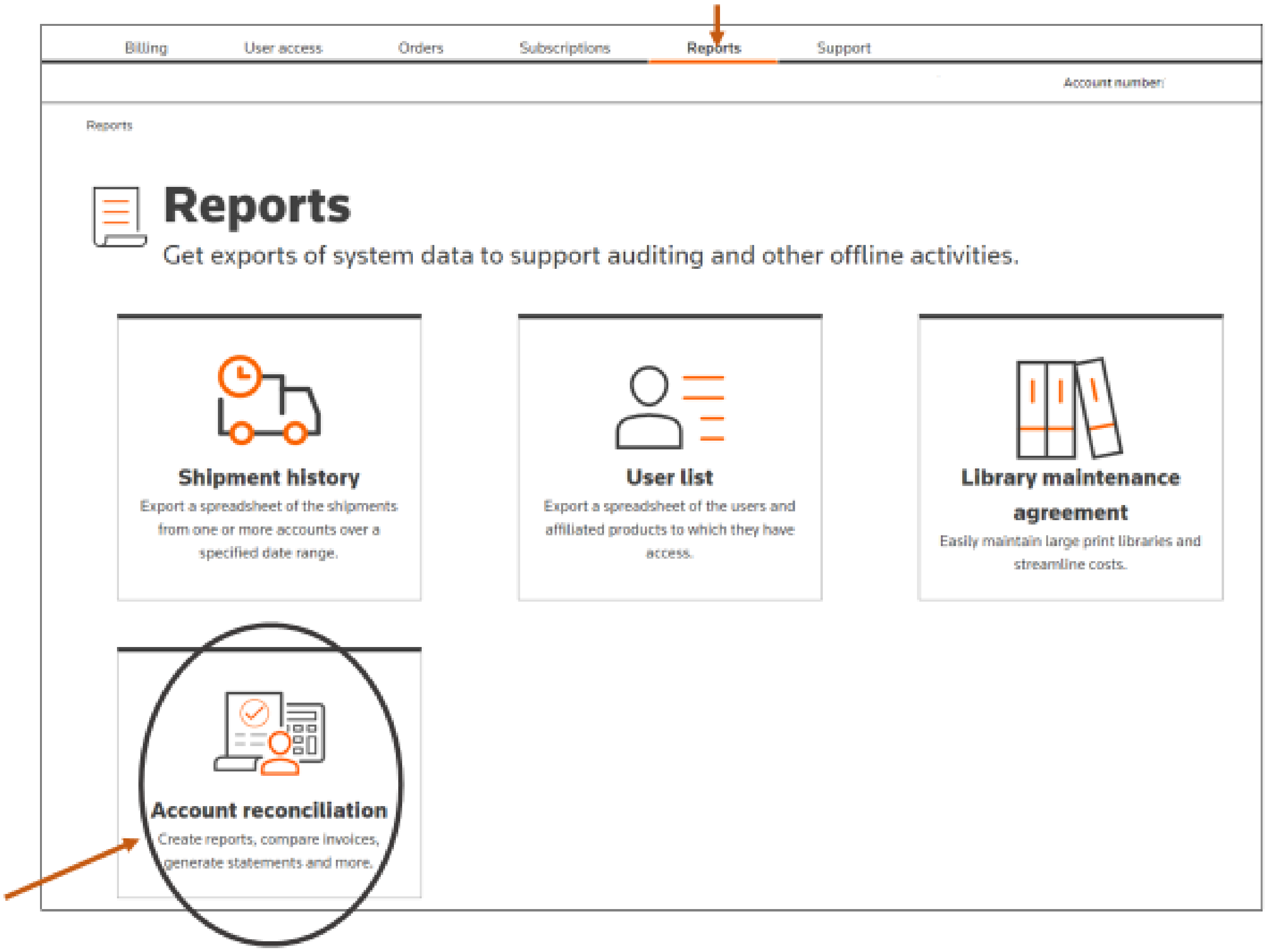


Then, click **Download the report**.

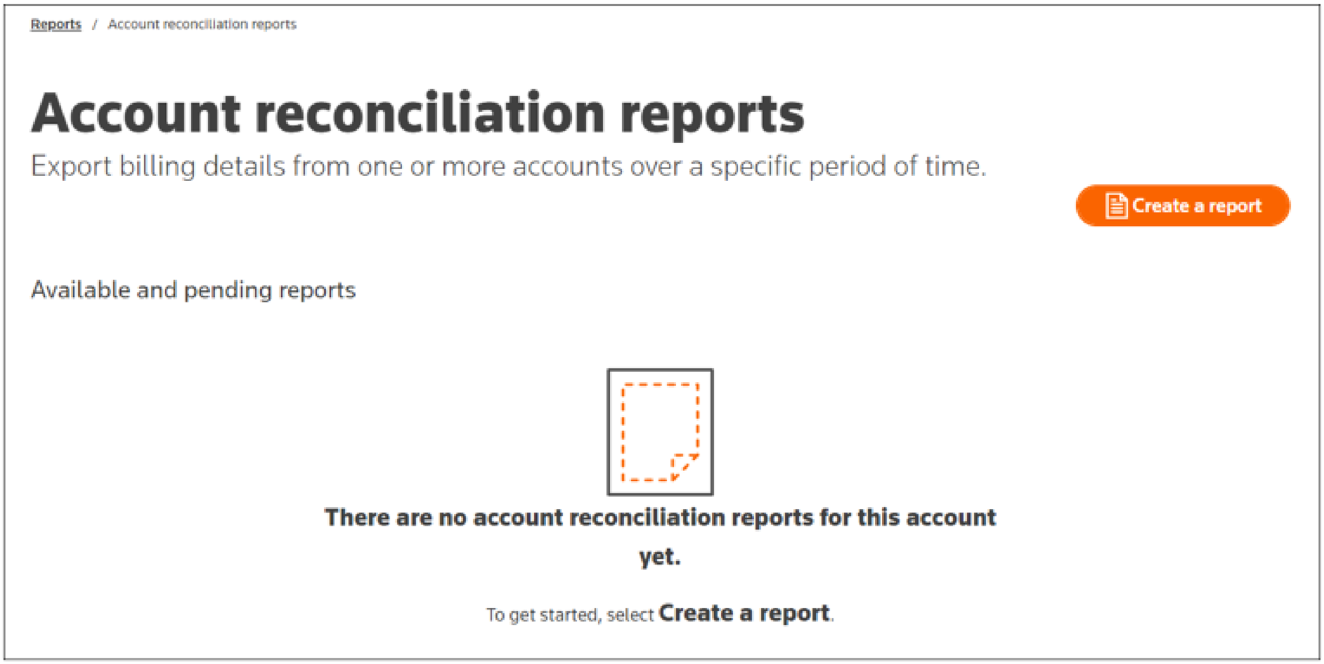


Account Reconciliation Report

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

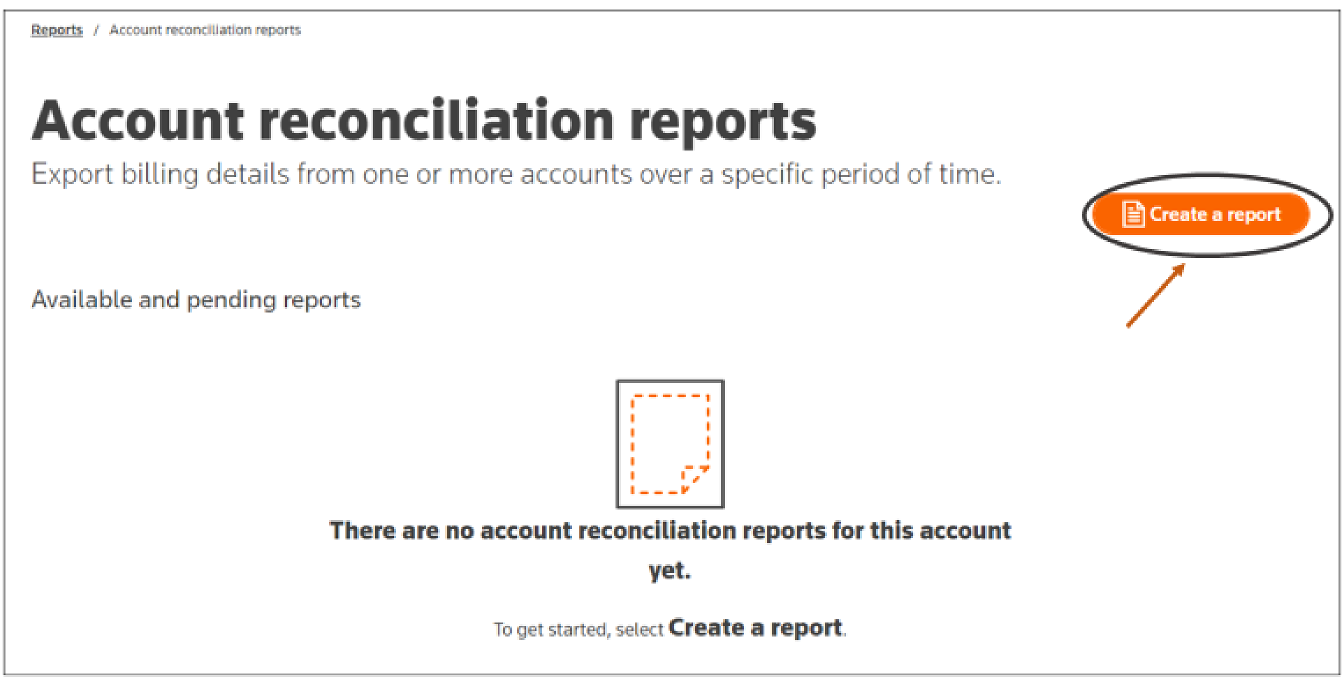


A list of previously created account reconciliation reports will appear in a chart. If no prior account reconciliation report exists, you will see a message similar to the one below.

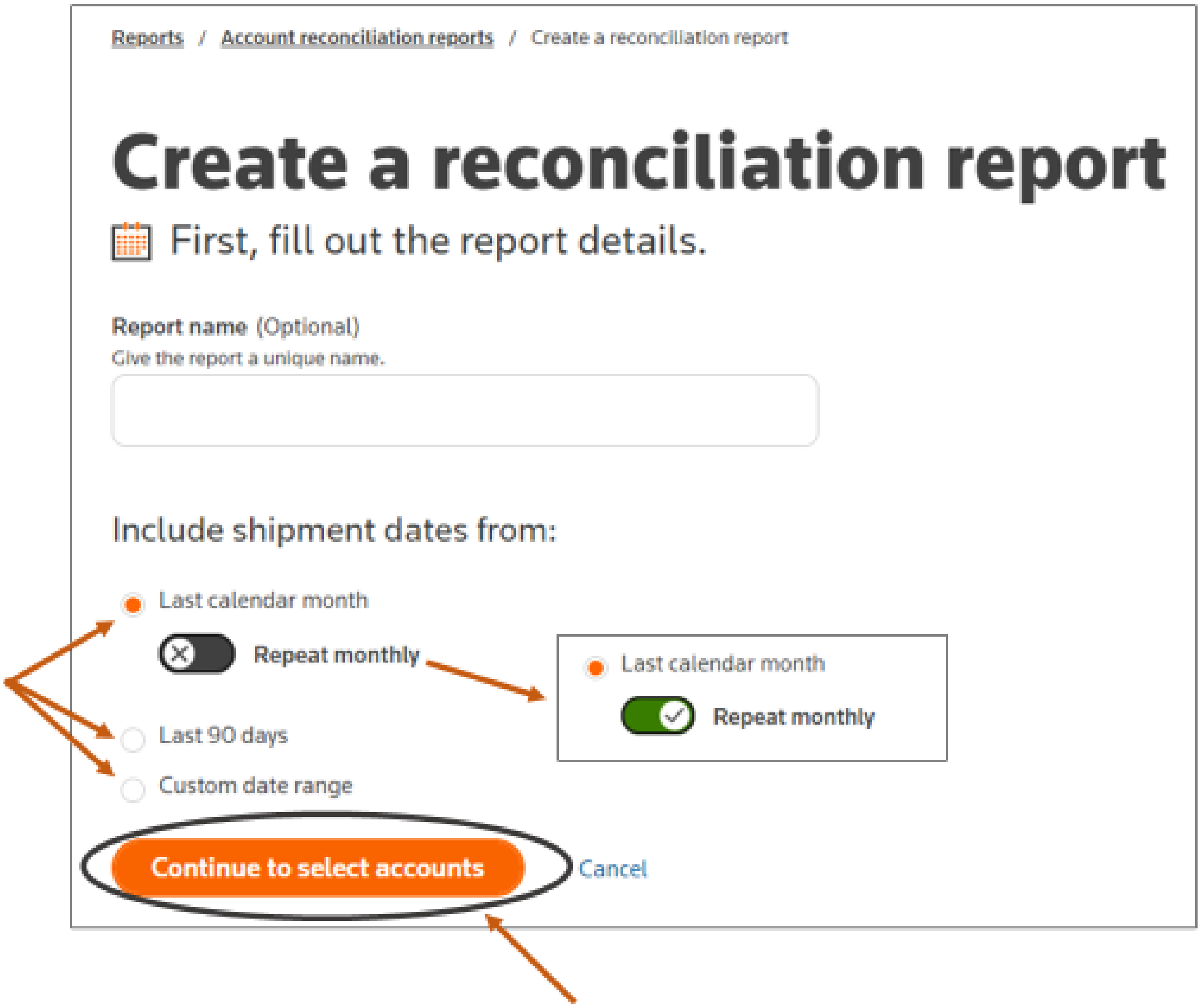


Create an Account Reconciliation Report

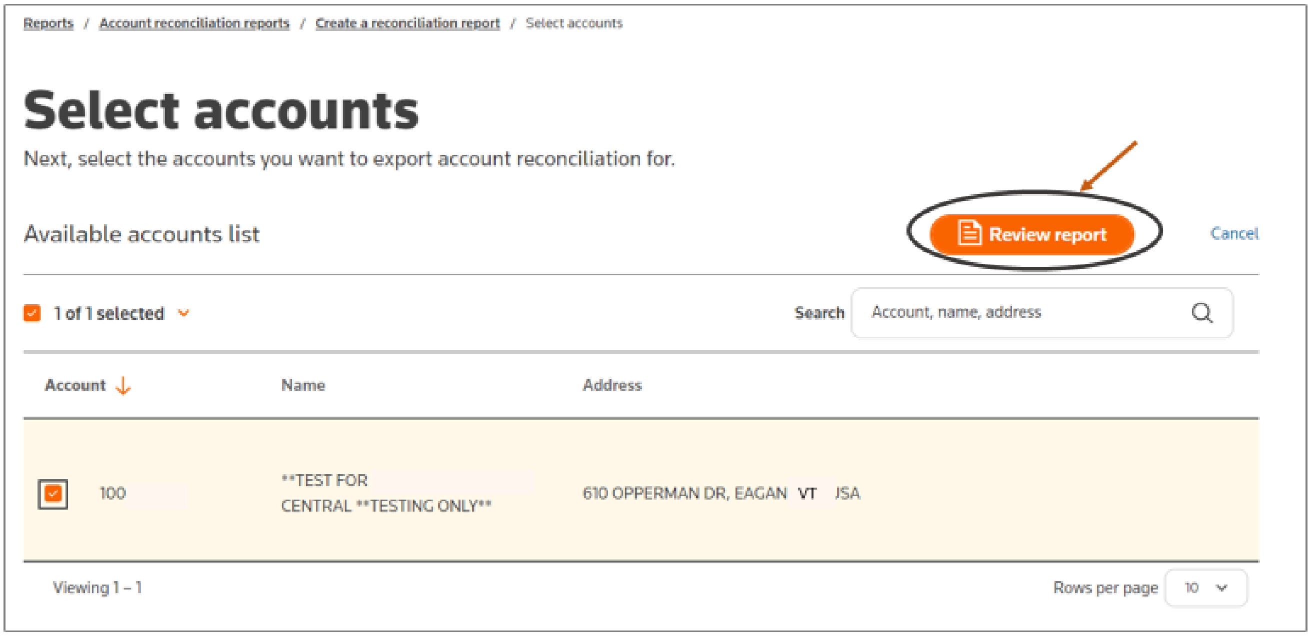
From the Account reconciliation reports page, click **Create a report**.



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

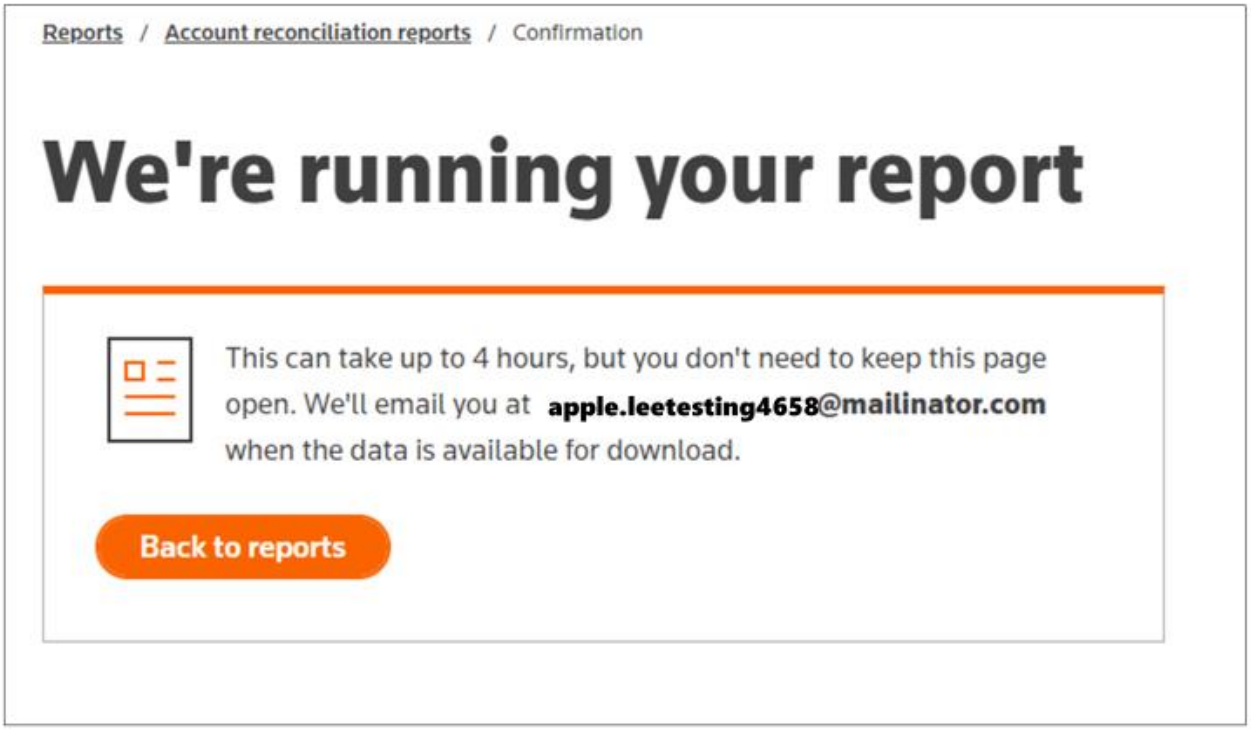


Next, select the accounts on which you want to run a report. Then, click **Review report**.

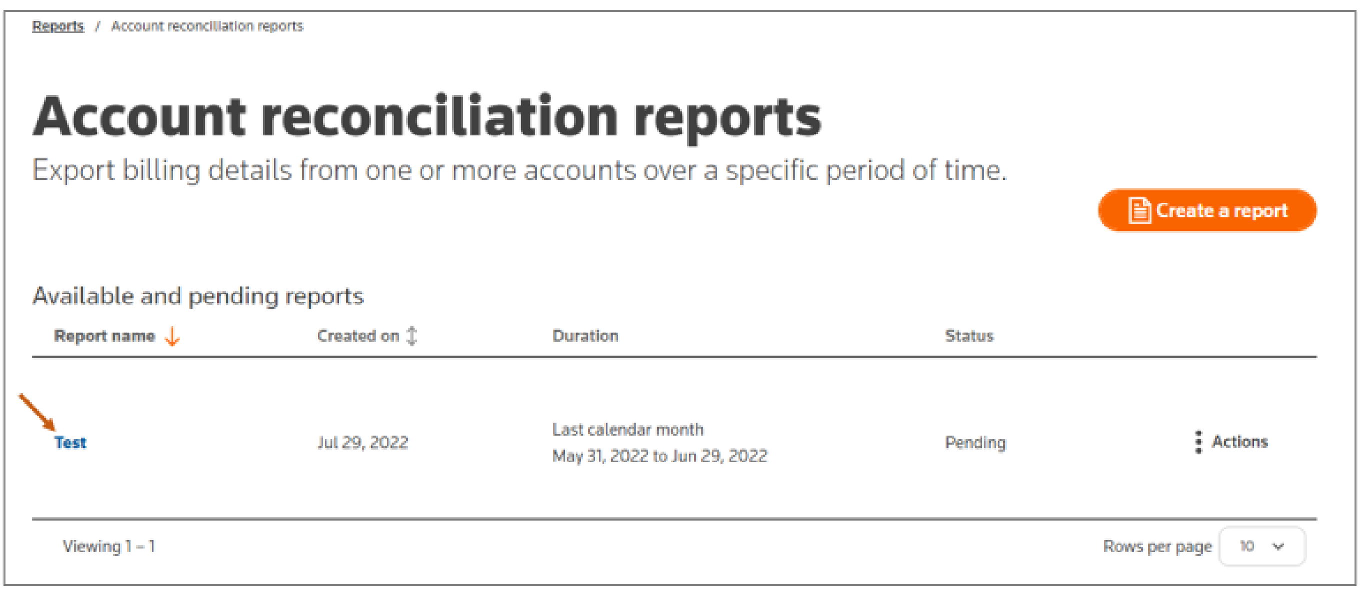


To make any edits to the report name, selected accounts, date range or recurring status, click **Edit** next to the relevant change. Then, enter the desired changes. When the report details are correct, click **Save and run report**.

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



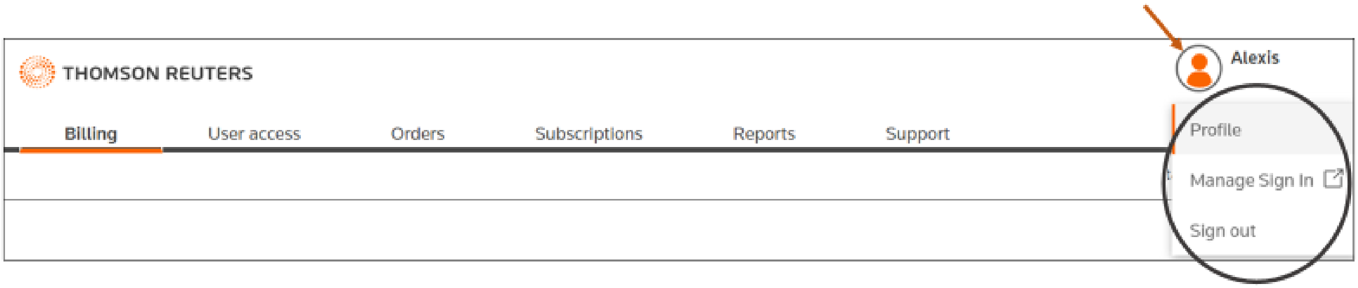
If you navigate back to the account reconciliation reports page, you will see the status of the created report. Once the report is done processing, you can click on the report to view it.



MANAGE YOUR PROFILE

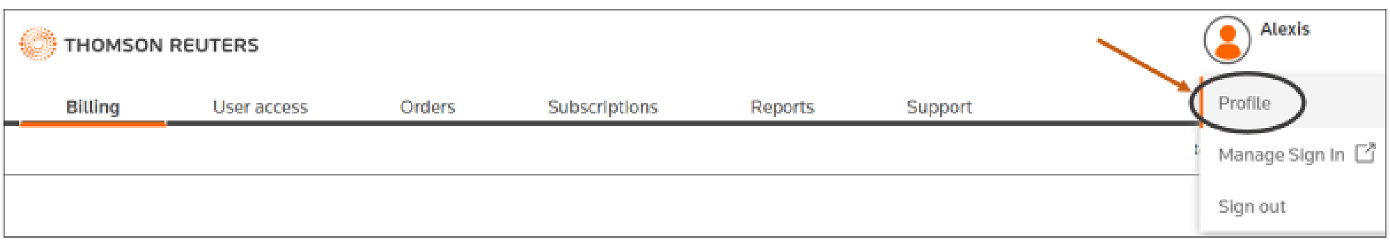
View Profile, Manage Sign In or Sign Out

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



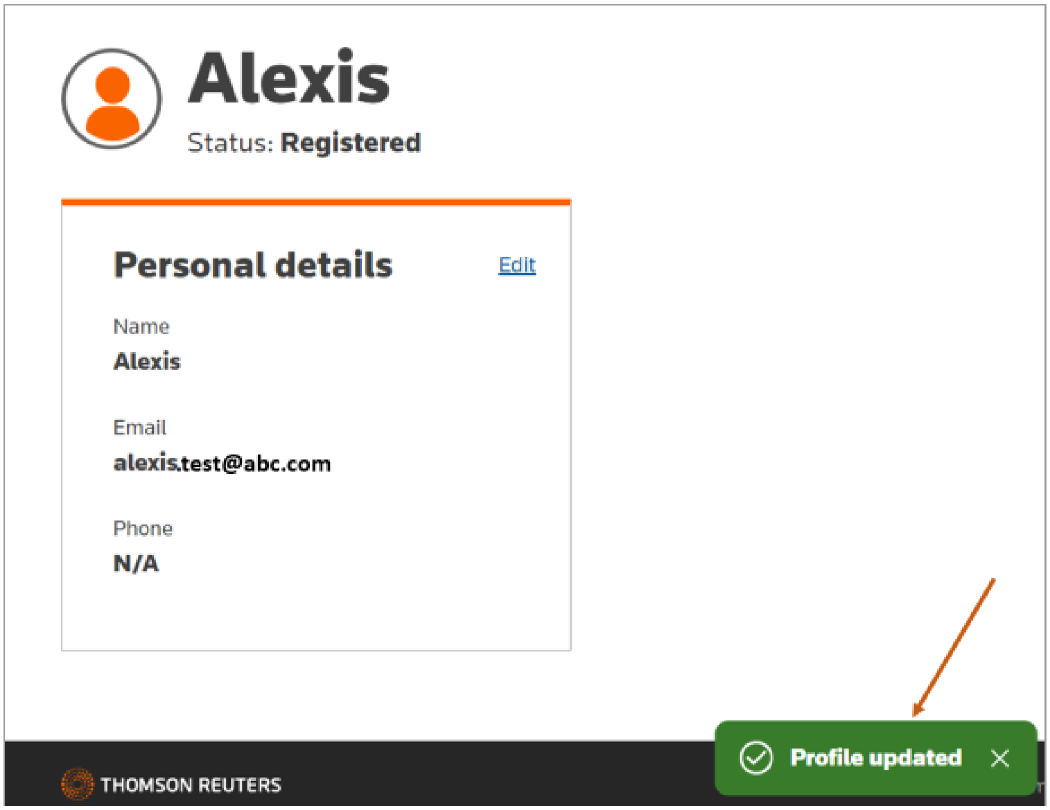
Profile

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**.

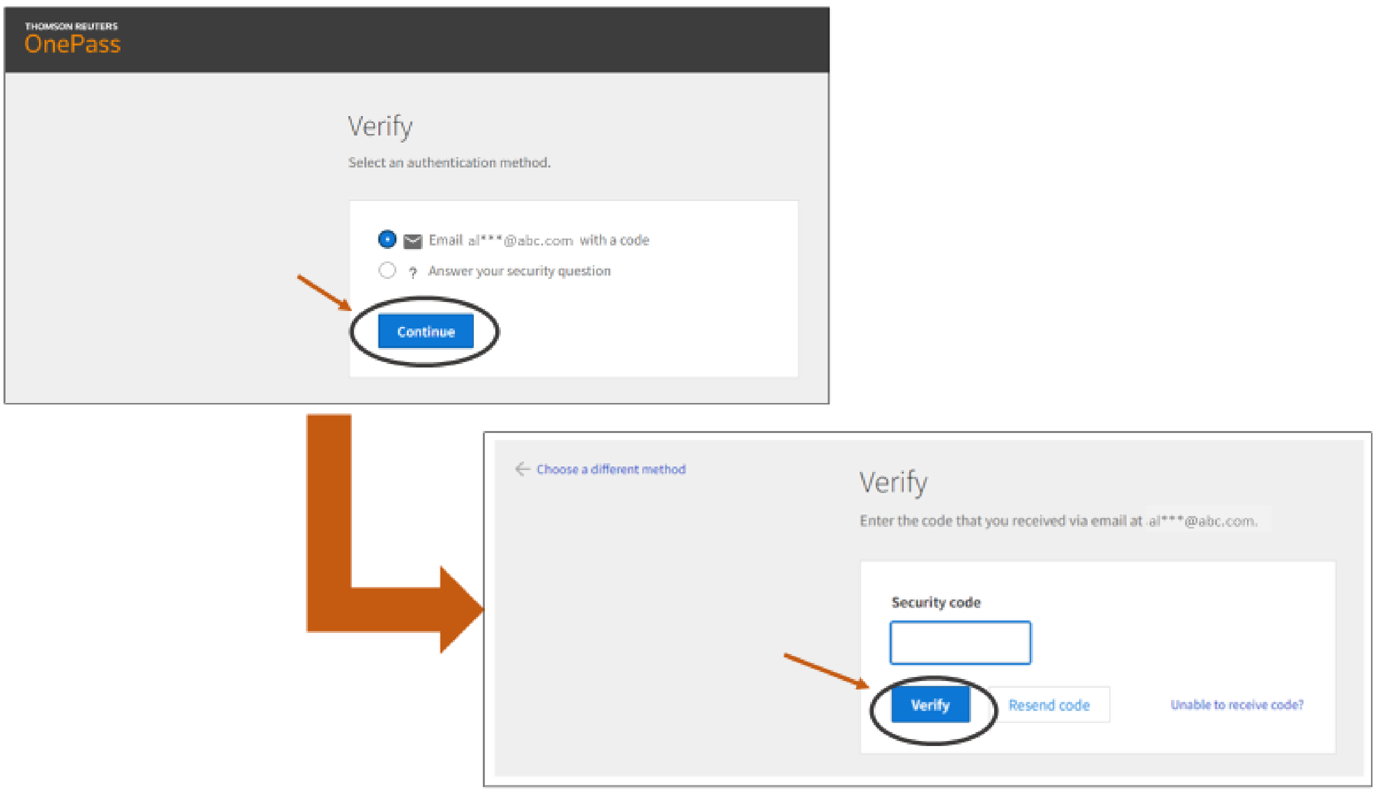
After clicking Save, you will see a green box confirming your profile was updated similar to the one below.



Manage Sign In

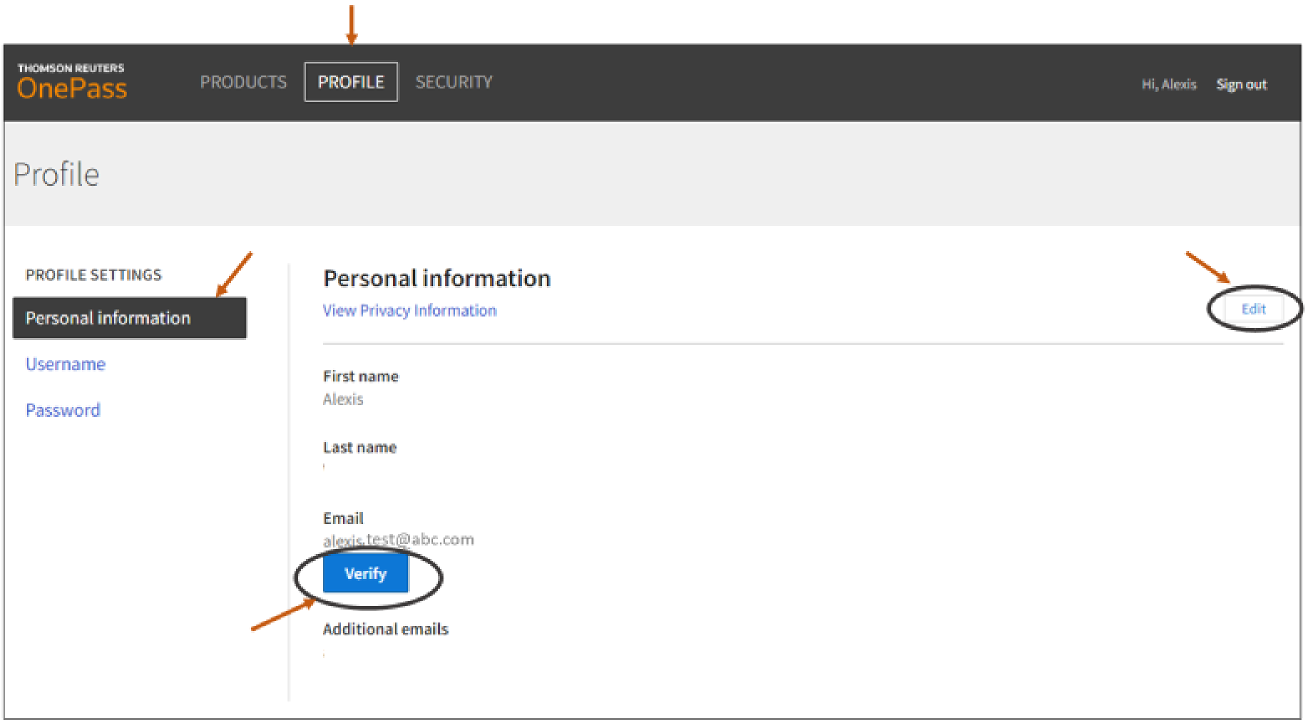
To manage your Thomson Reuters OnePass, including products, profile, and security options, click **Manage Sign In** from the icon on the top right-hand side next to your name.

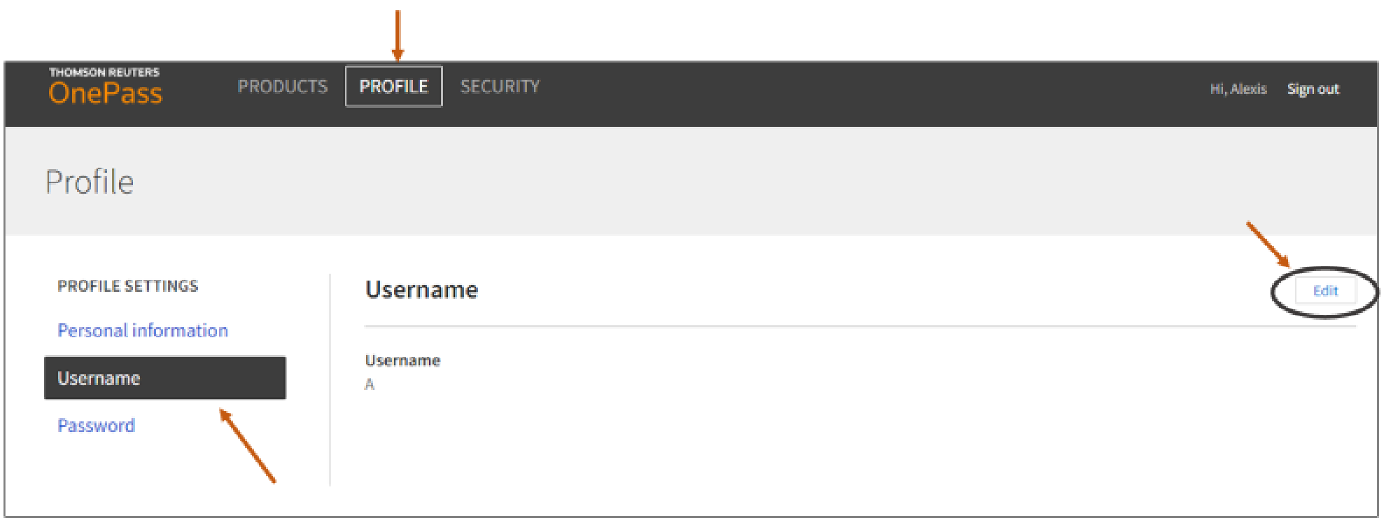
Next, follow the prompts to verify your identity.

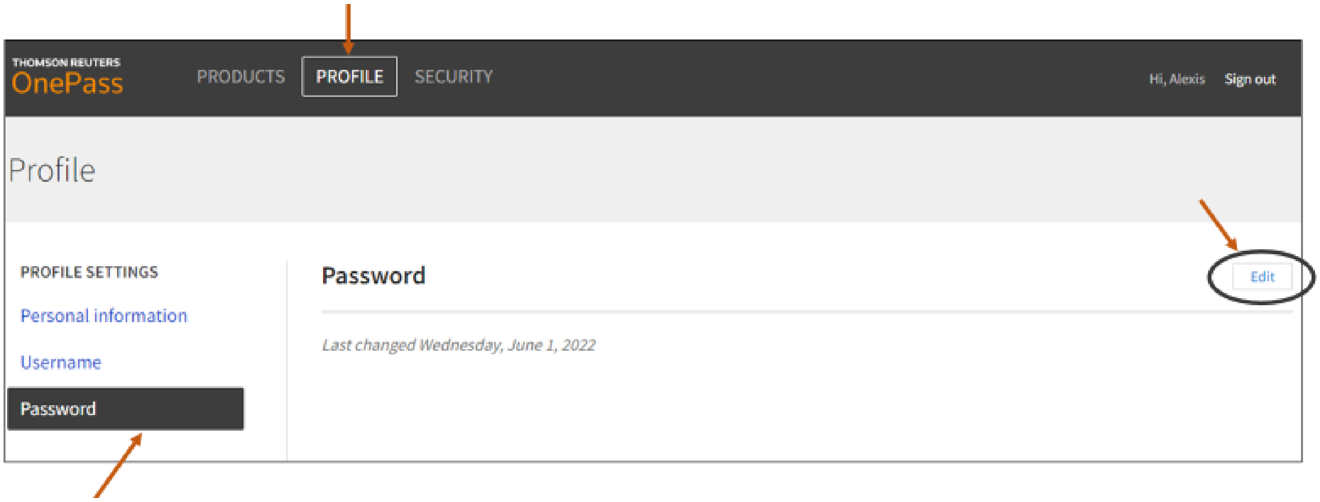


OnePass PROFILE

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

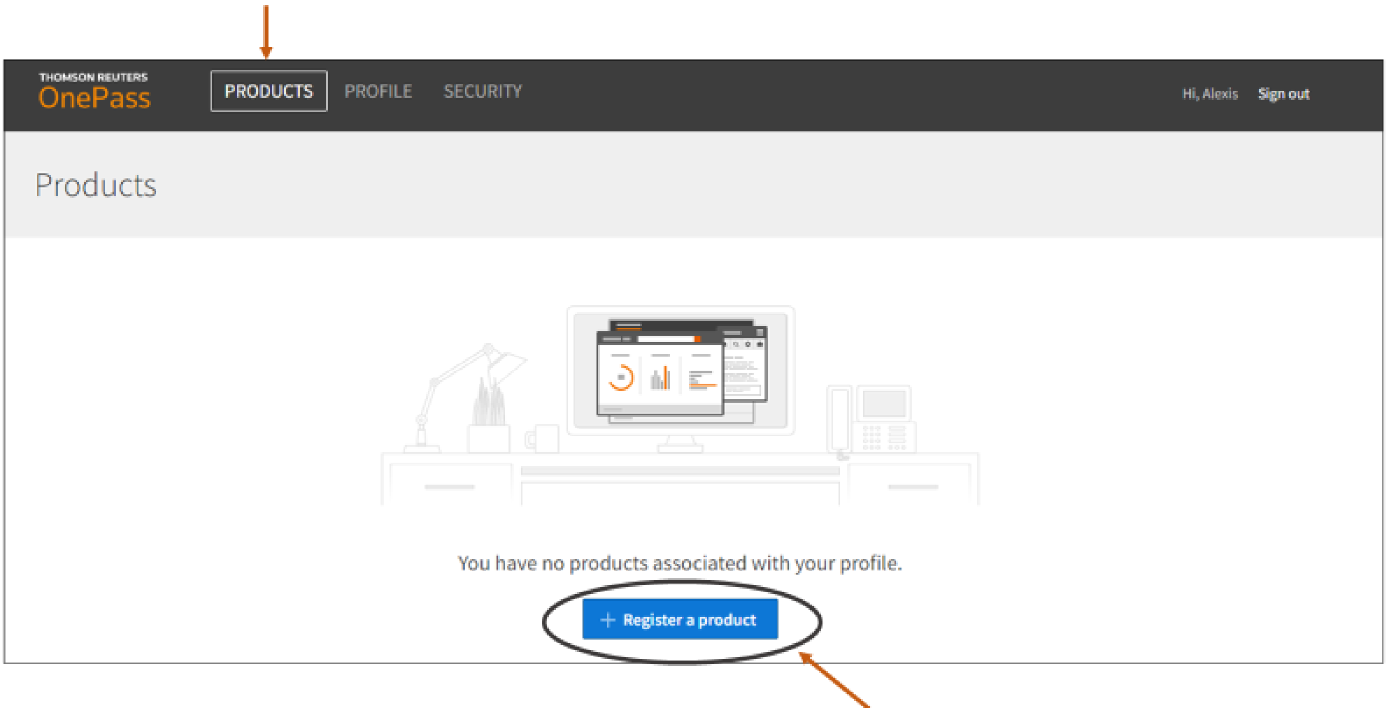




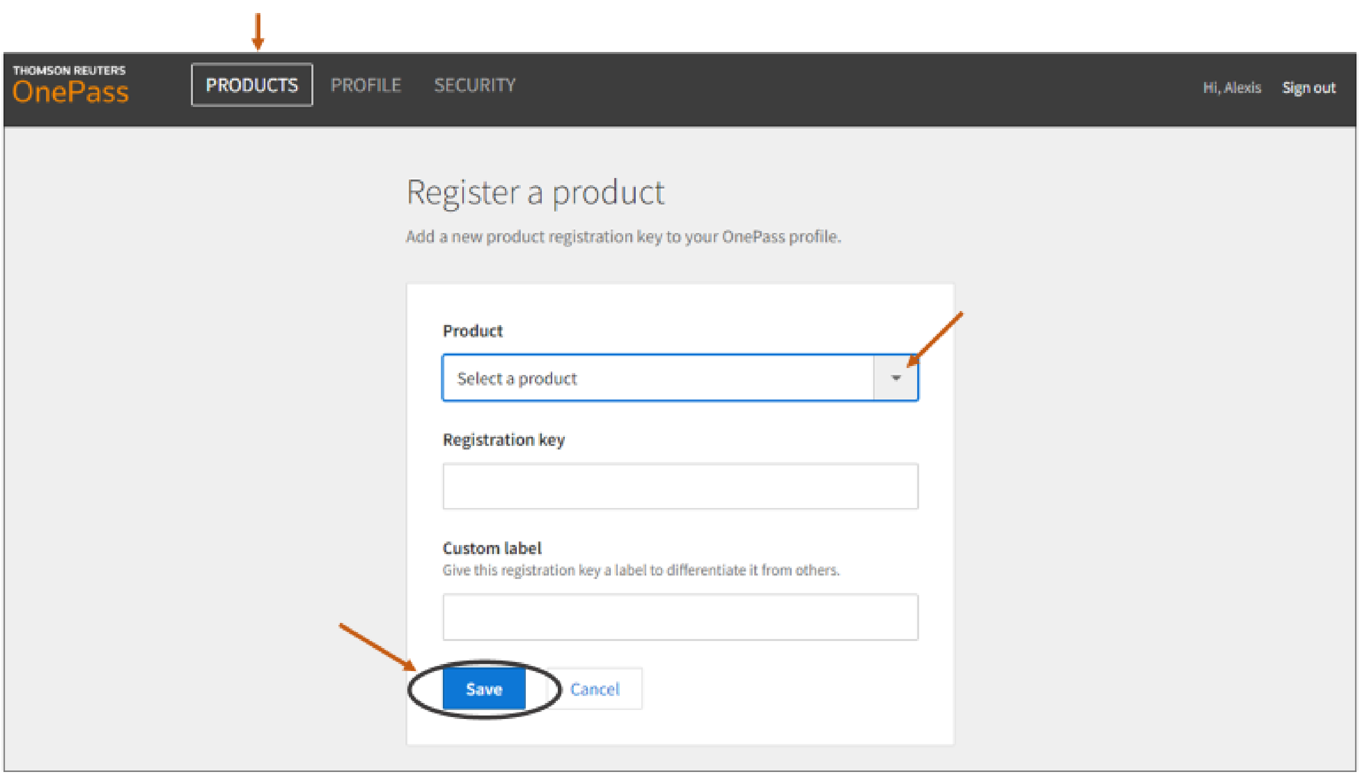

THOMSON REUTERS
OnePass
PRODUCTS
PROFILE
SECURITY
Hi, Alexis
Sign out
Profile
PROFILE SETTINGS
Personal information
Username
Password
Password
Edit
Last changed Wednesday, June 1, 2022

OnePass PRODUCTS

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

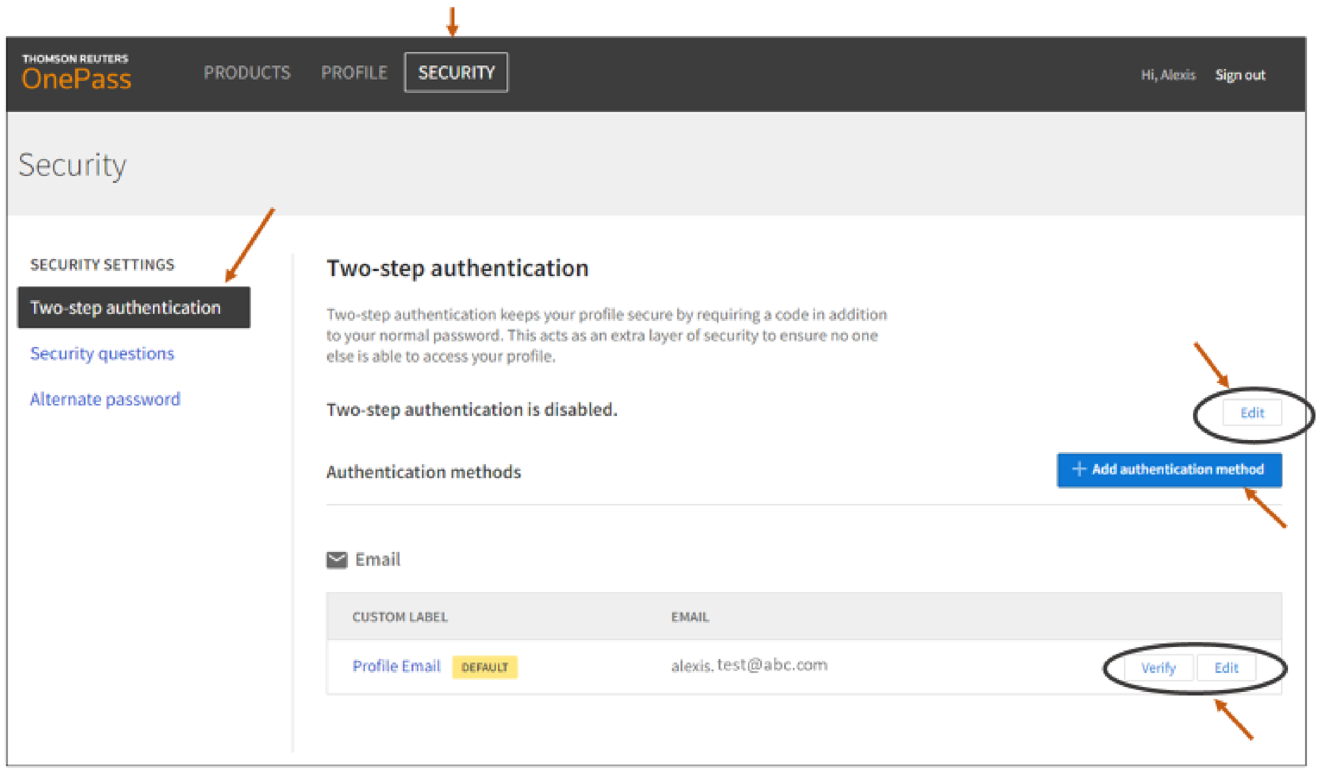


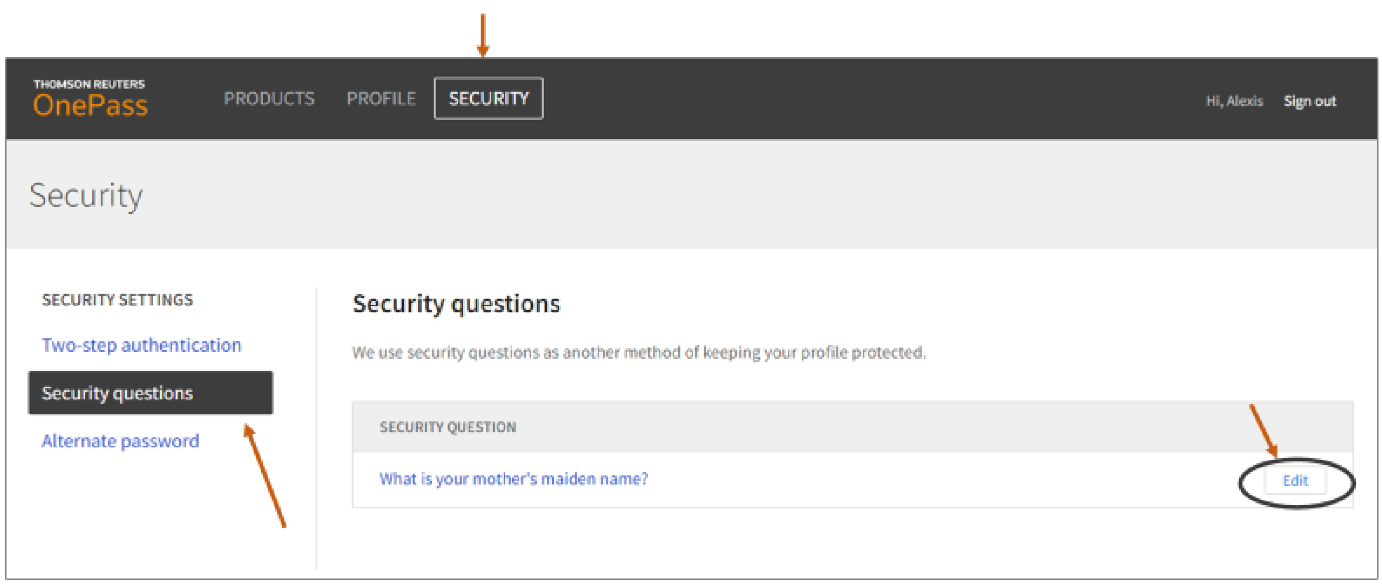
Next, click on the carrot under Product and select the **Product** you want to register. Then, provide the **Registration key** and if desired a **Custom label**. Then, click **Save**.

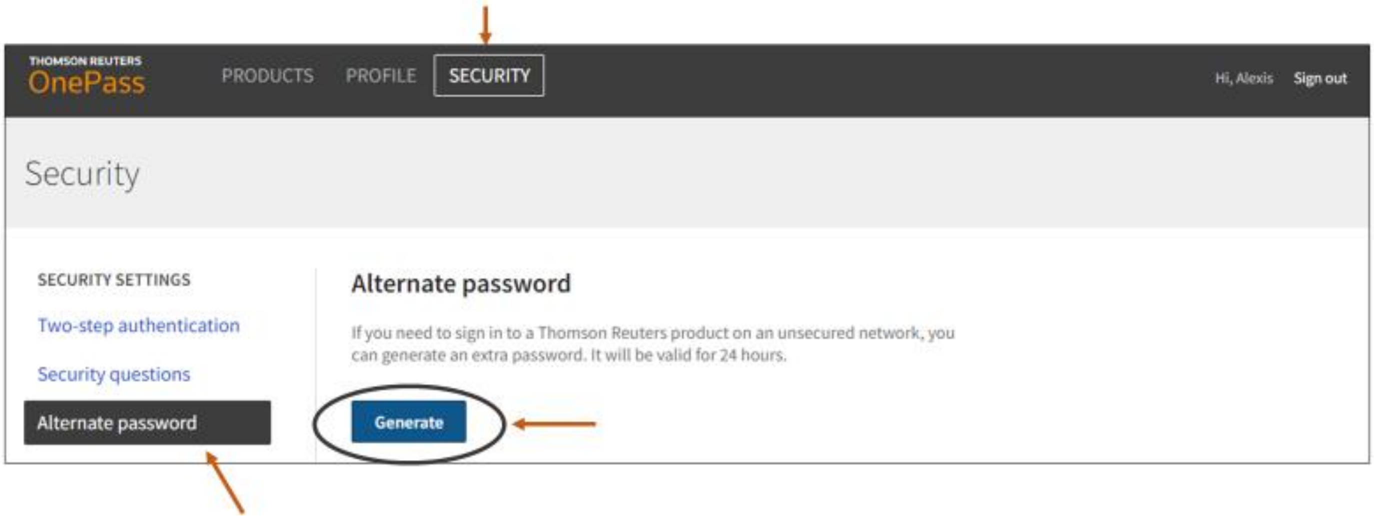


OnePass SECURITY

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

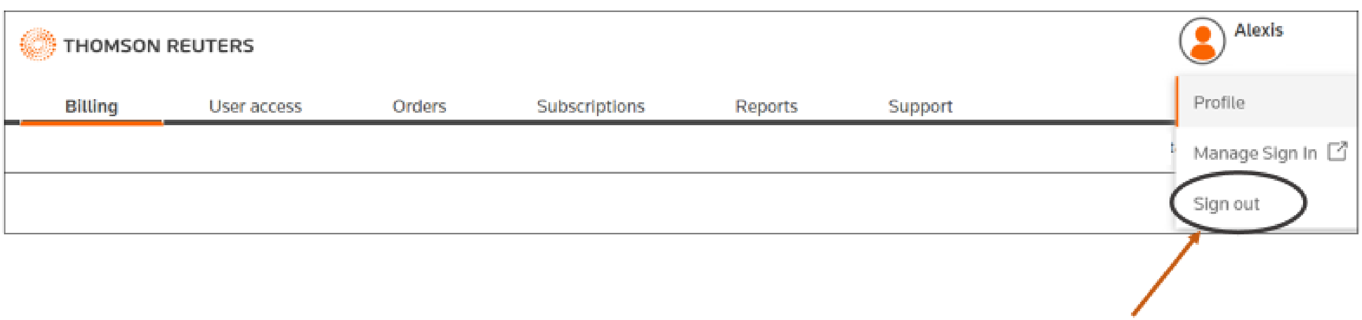






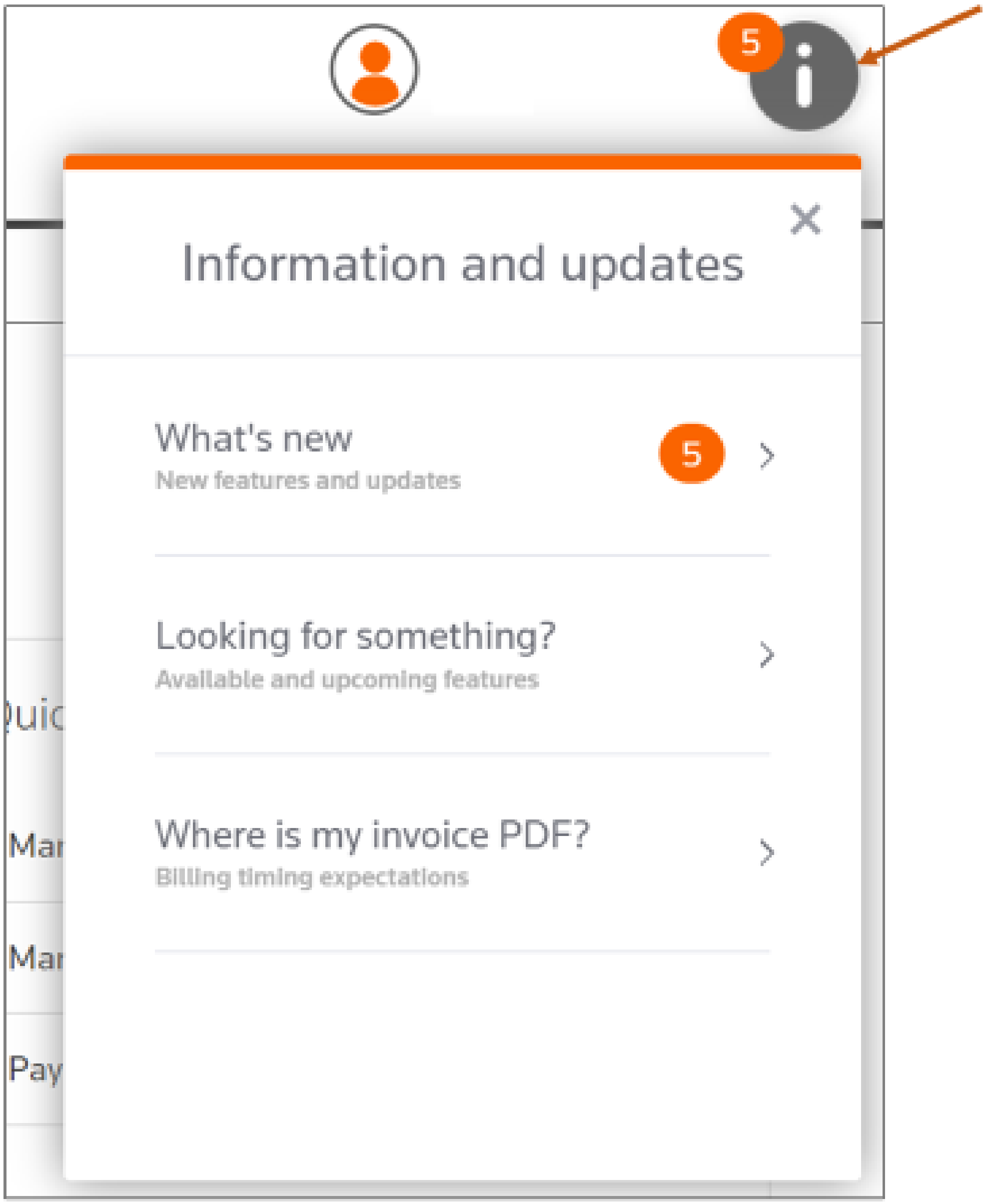
Sign-out

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



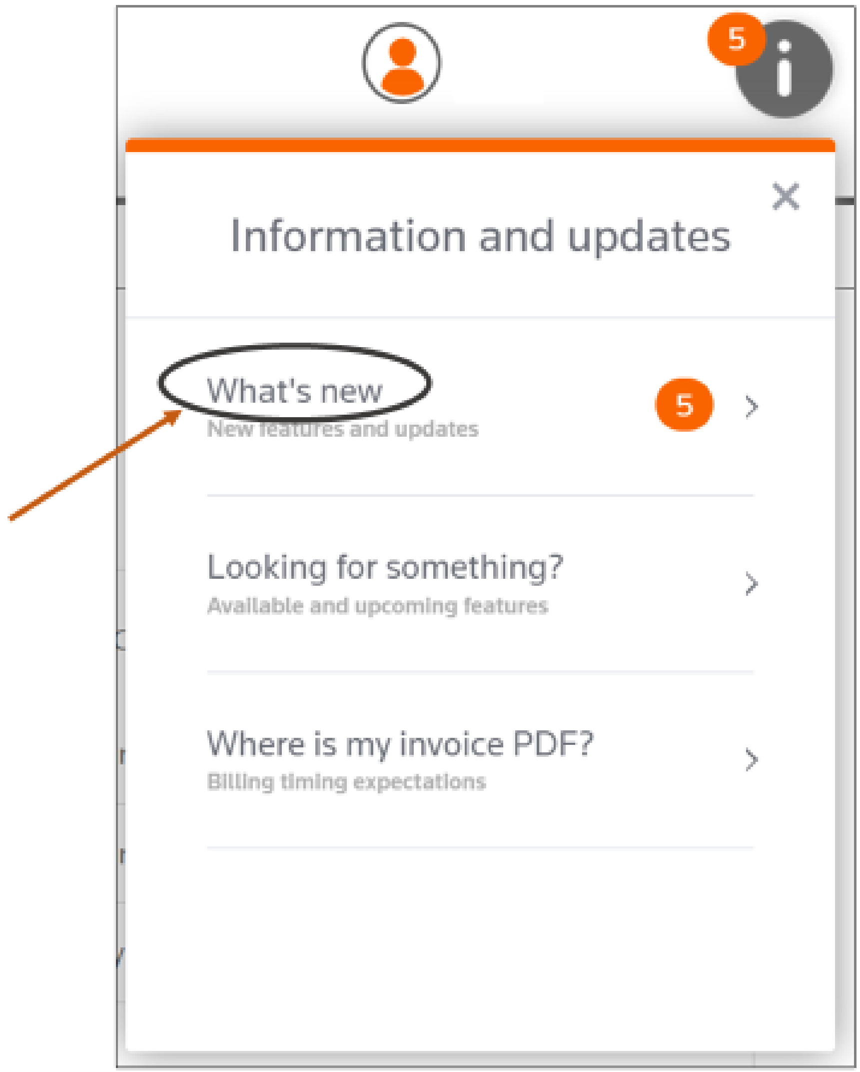
INFORMATION AND UPDATES

Click on the ⓘ on the top right side.



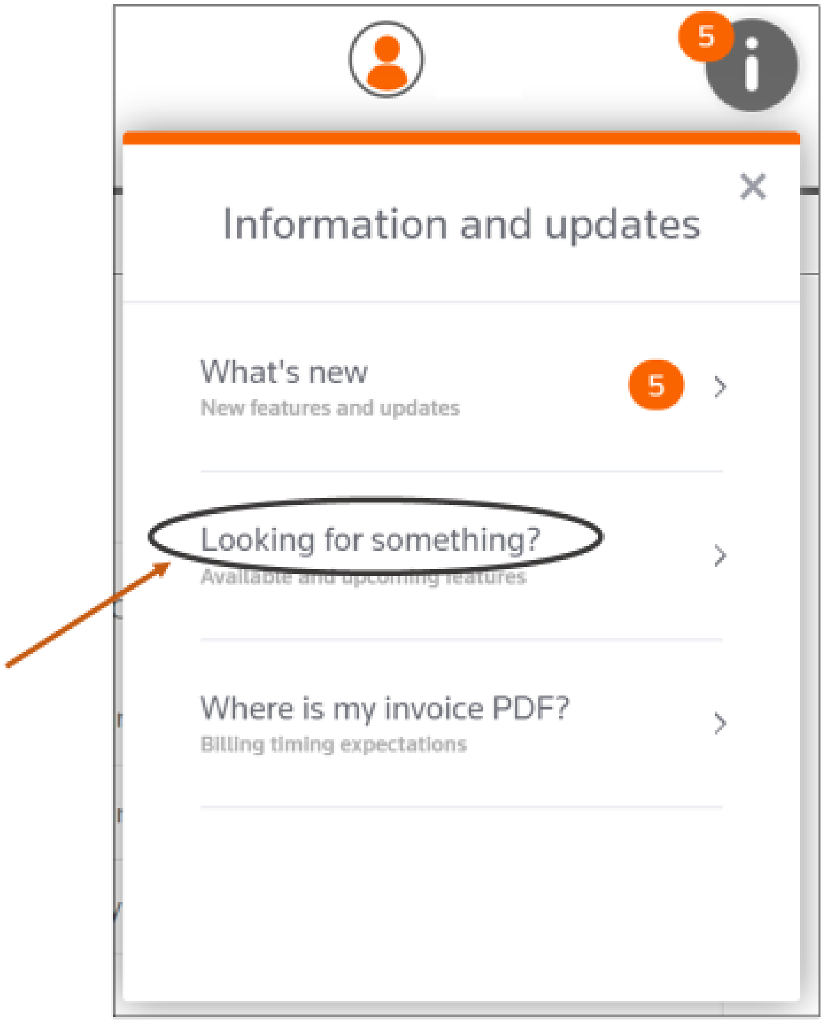
What's new

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

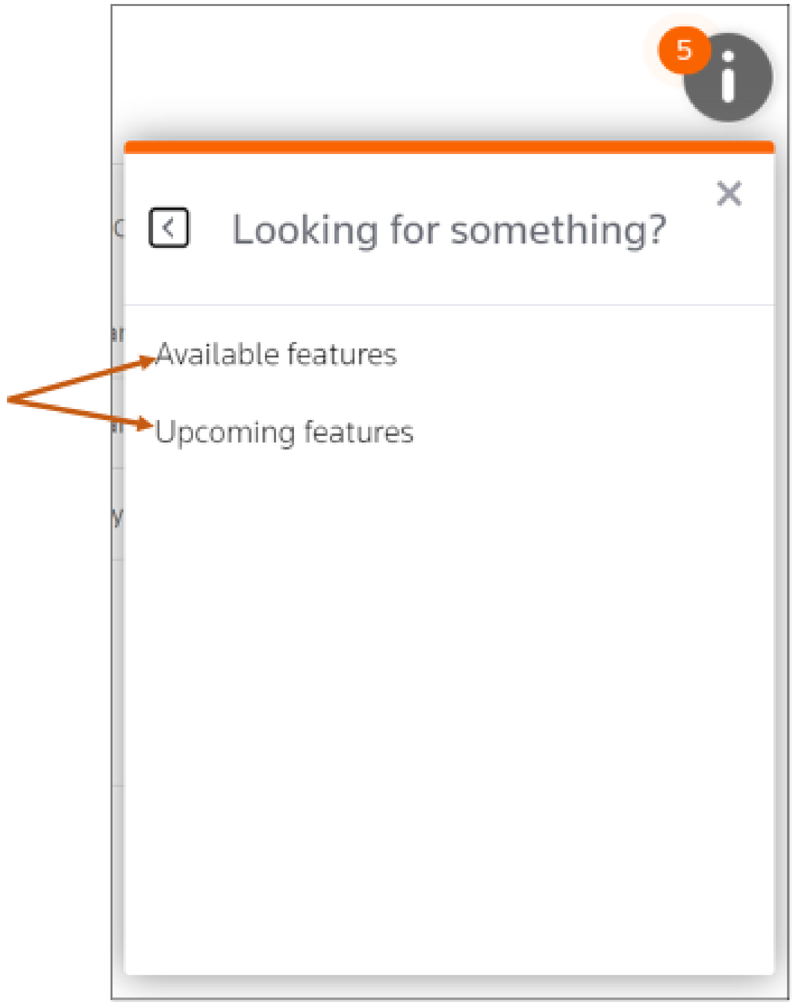


Looking for something?

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



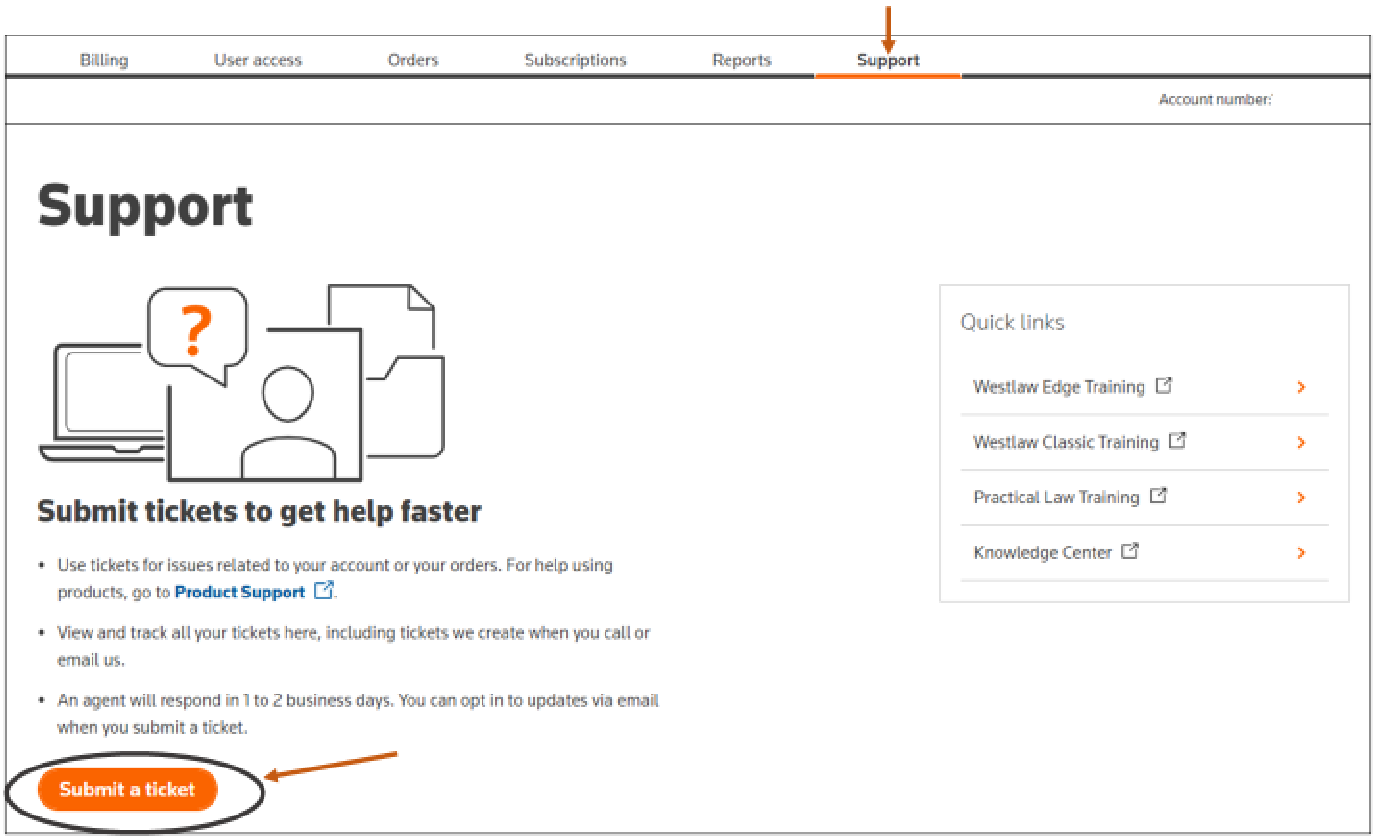
Next click either **Available features** or **Upcoming features**.



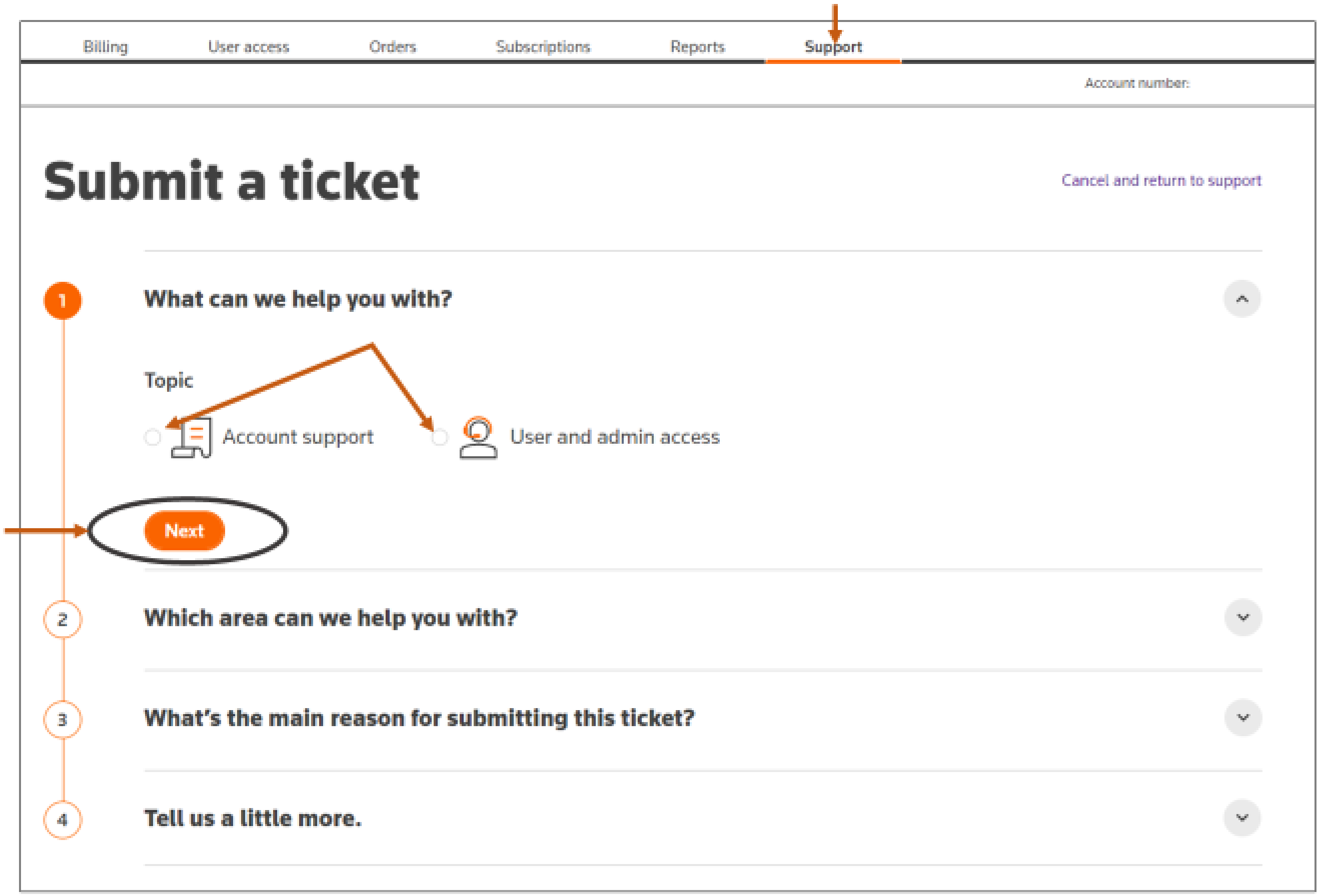
SUPPORT

Submit a Ticket

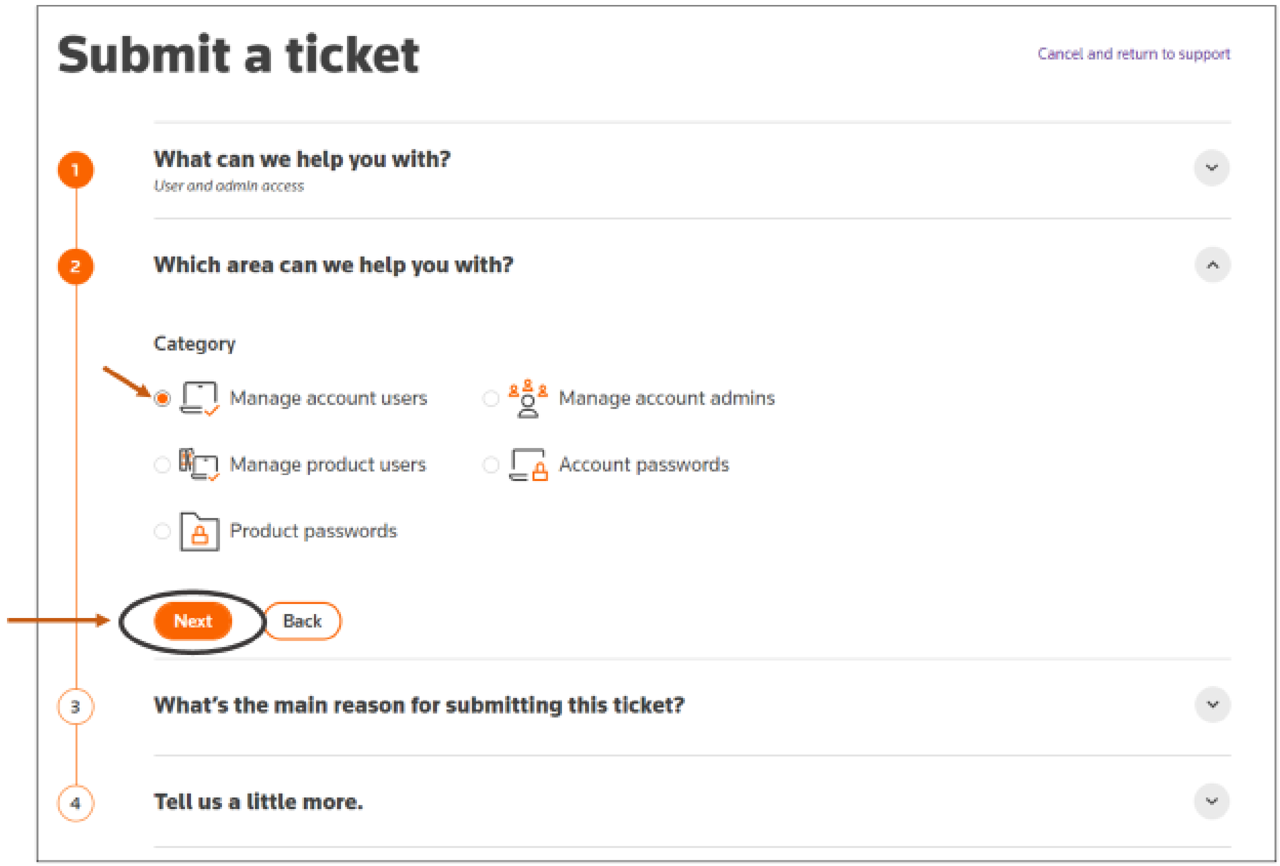
To submit a ticket, navigate to the **Support** tab and click **Submit a ticket**.

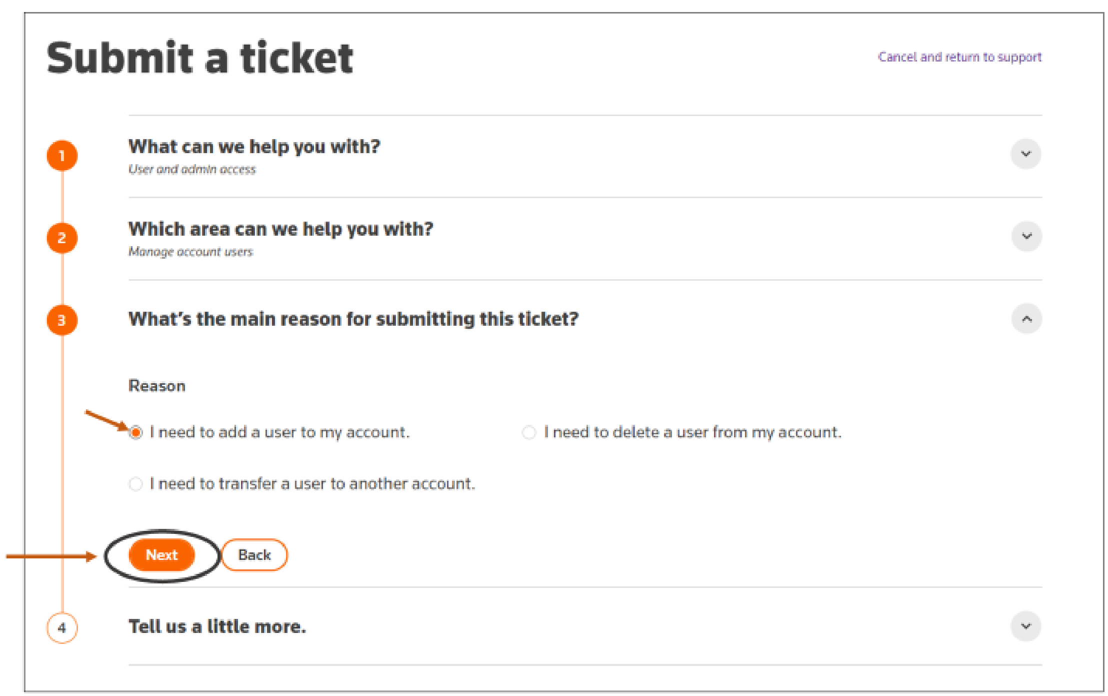


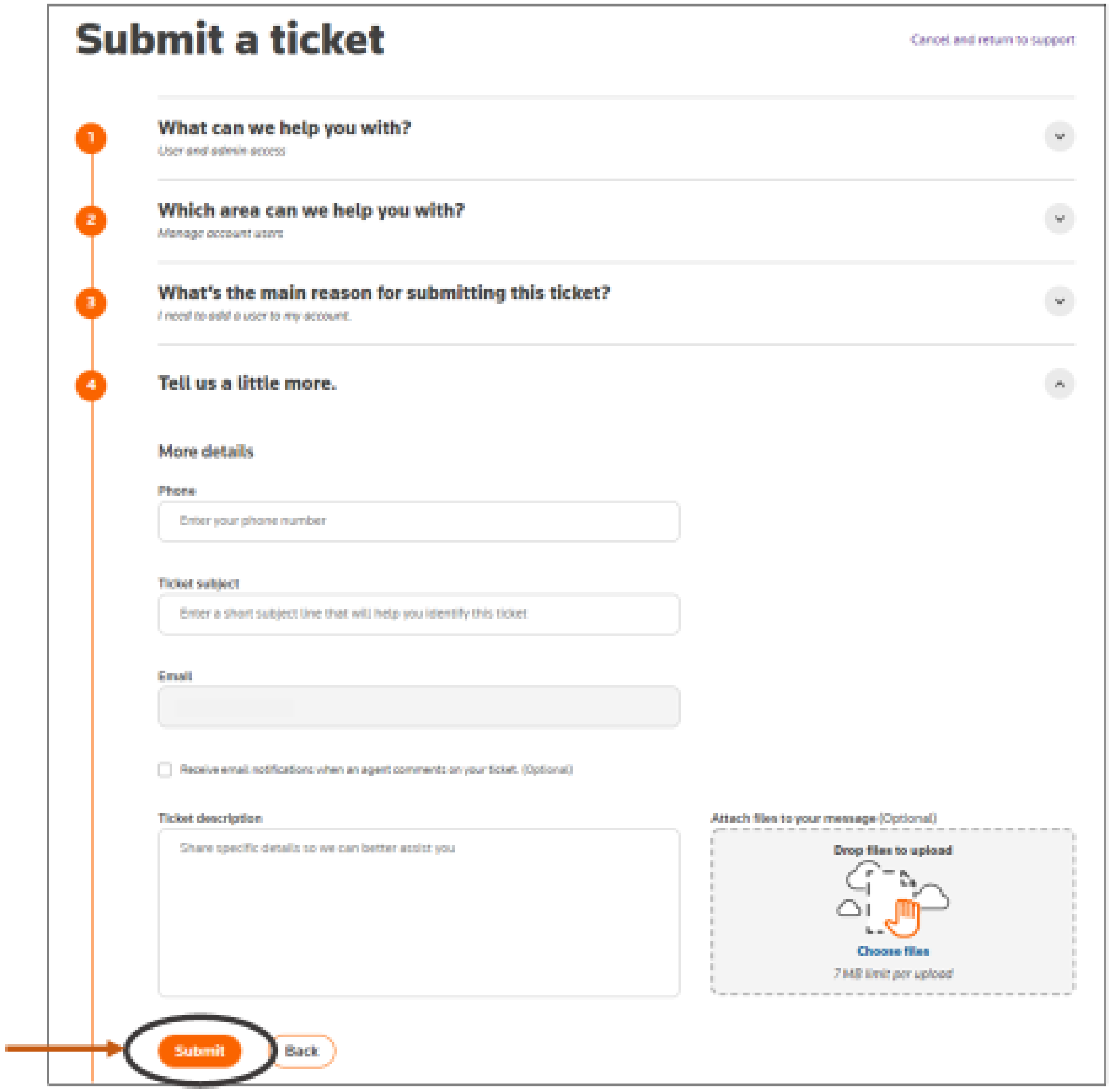
Next, under Topic, select either **Account support** or **User and admin access**. Then, click **Next**.



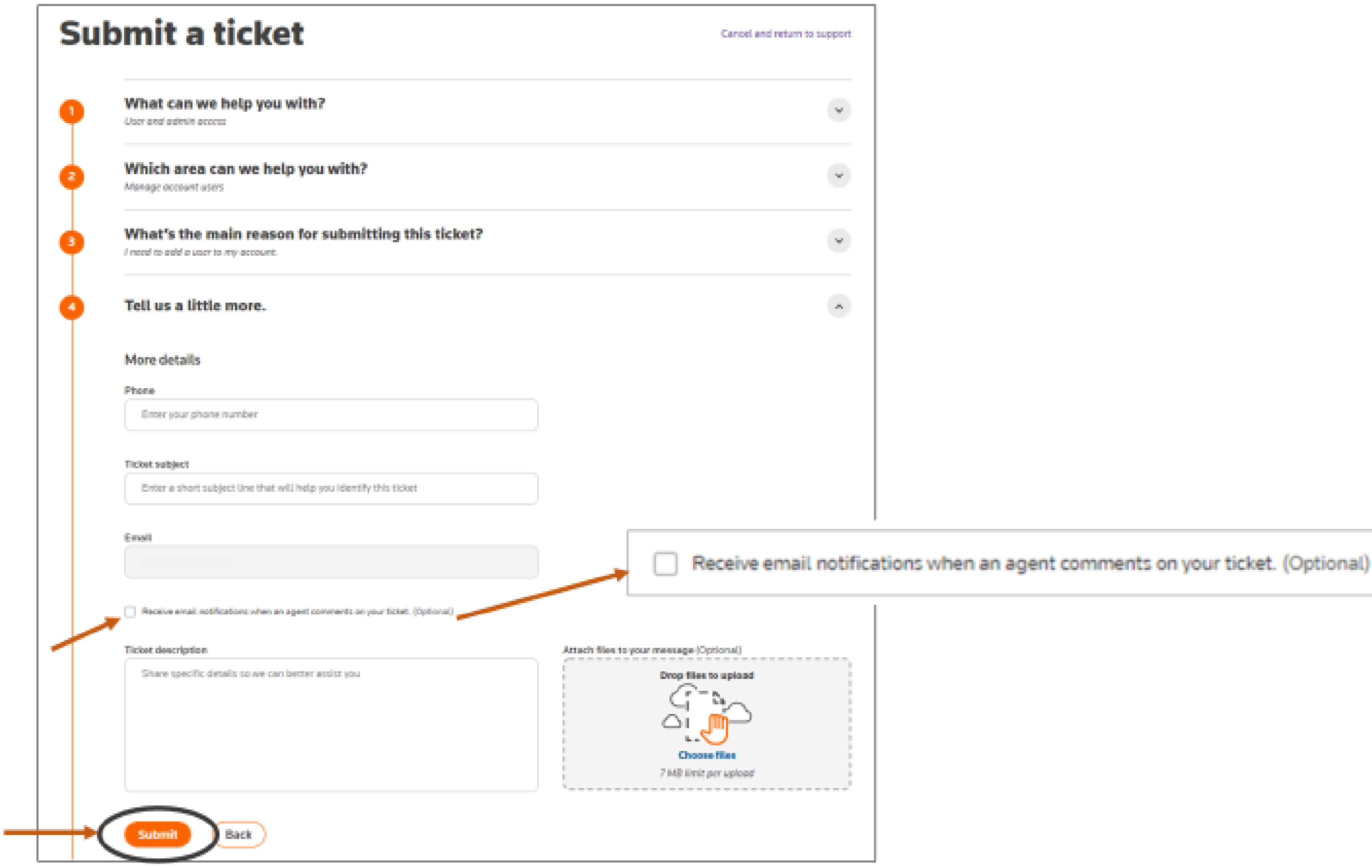
Follow the prompts to complete the ticket request. For an example of a ticket submission flow see the illustrations below.





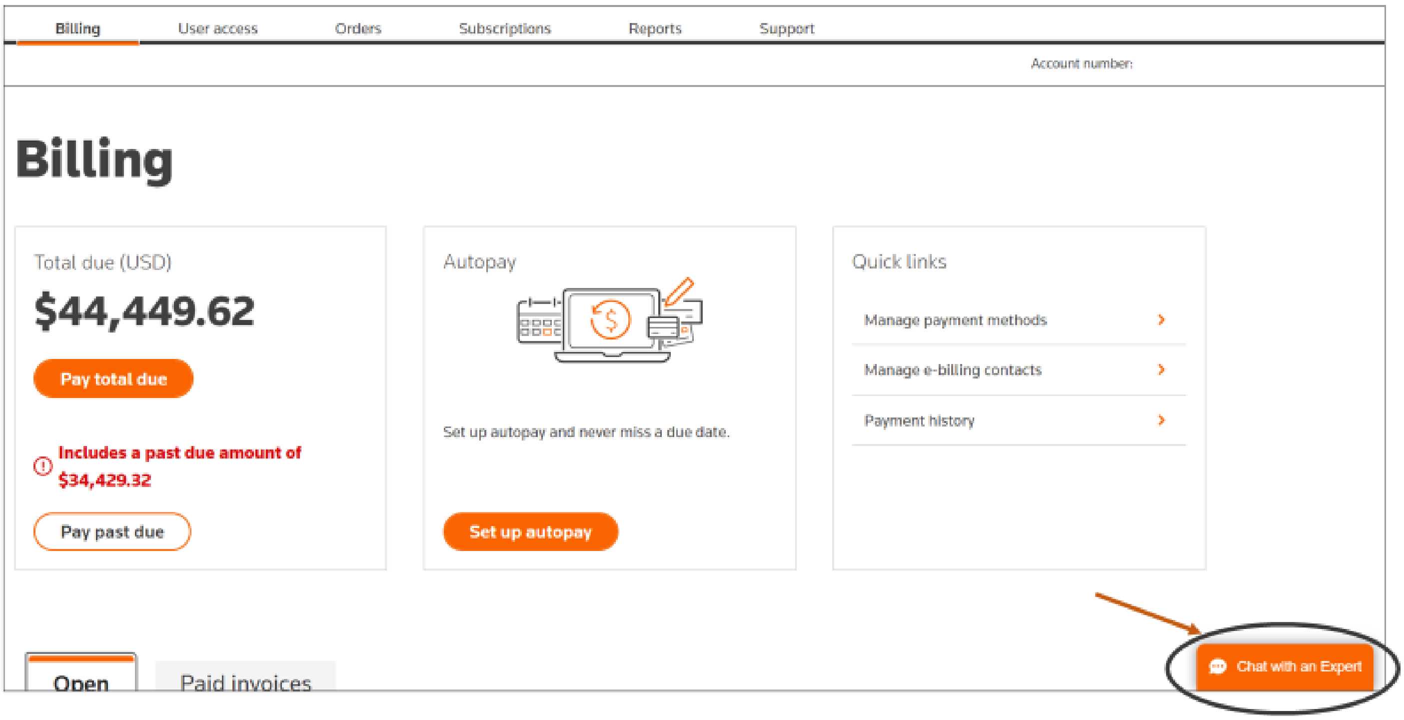

Submit a ticket
Cancel and return to support
1
What can we help you with?
User and admin access
2
Which area can we help you with?
Manage account users
3
What's the main reason for submitting this ticket?
I need to add a user to my account.
4
Tell us a little more.
More details
Phone
Enter your phone number
Ticket subject
Enter a short subject line that will help you identify this ticket
Email
Receive email notifications when an agent comments on your ticket. (Optional)
Ticket description
Share specific details so we can better assist you
Attach files to your message (Optional)
Drop files to upload
Choose files
7 MB limit per upload
Submit
Back

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.

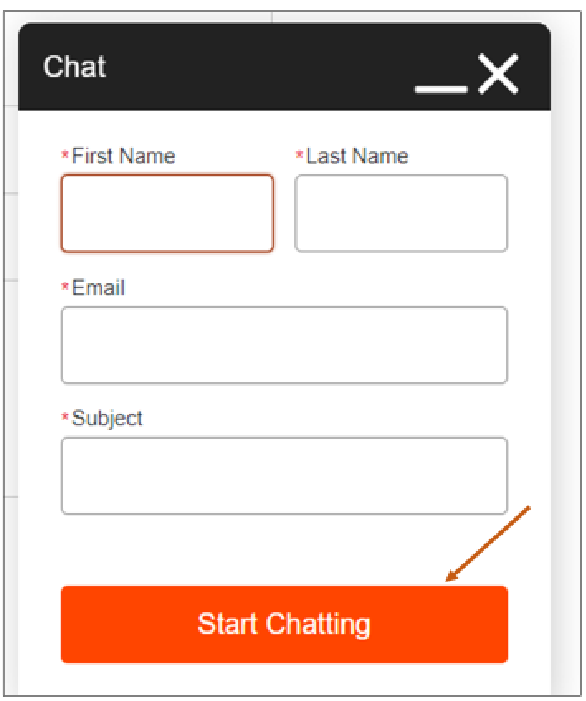


Live Chat

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



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



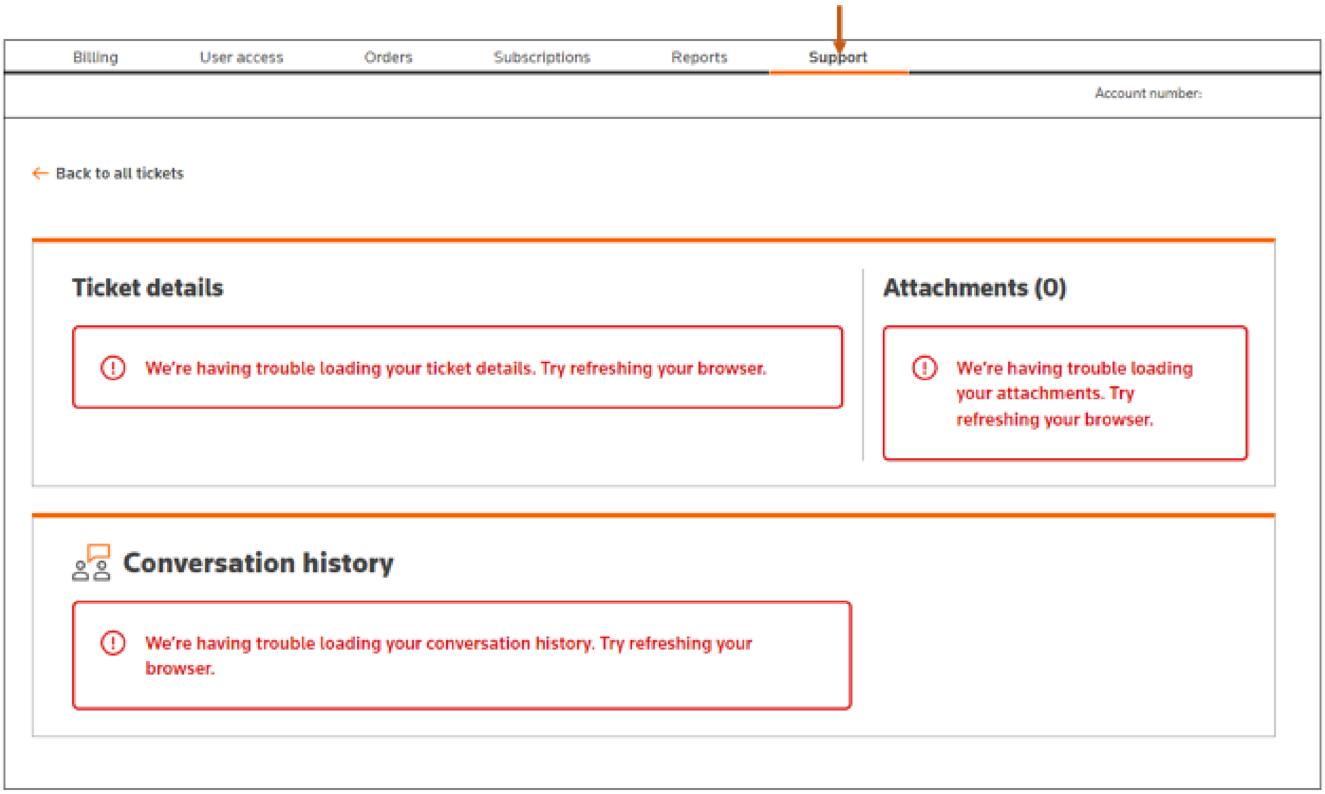
TROUBLESHOOTING & FAQs

Credit Card Error

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

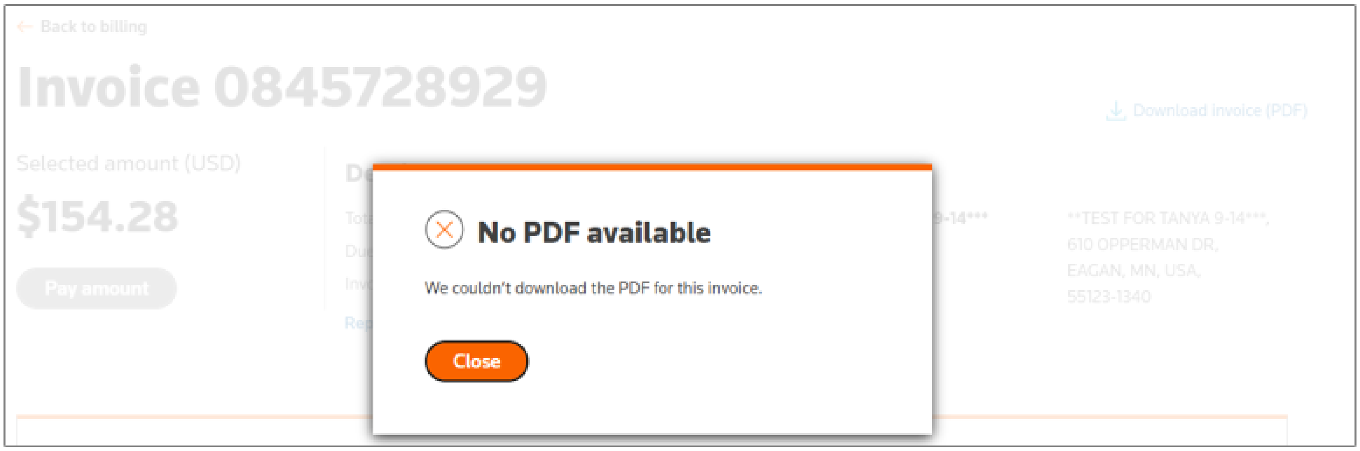
Error Displaying Support Data

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



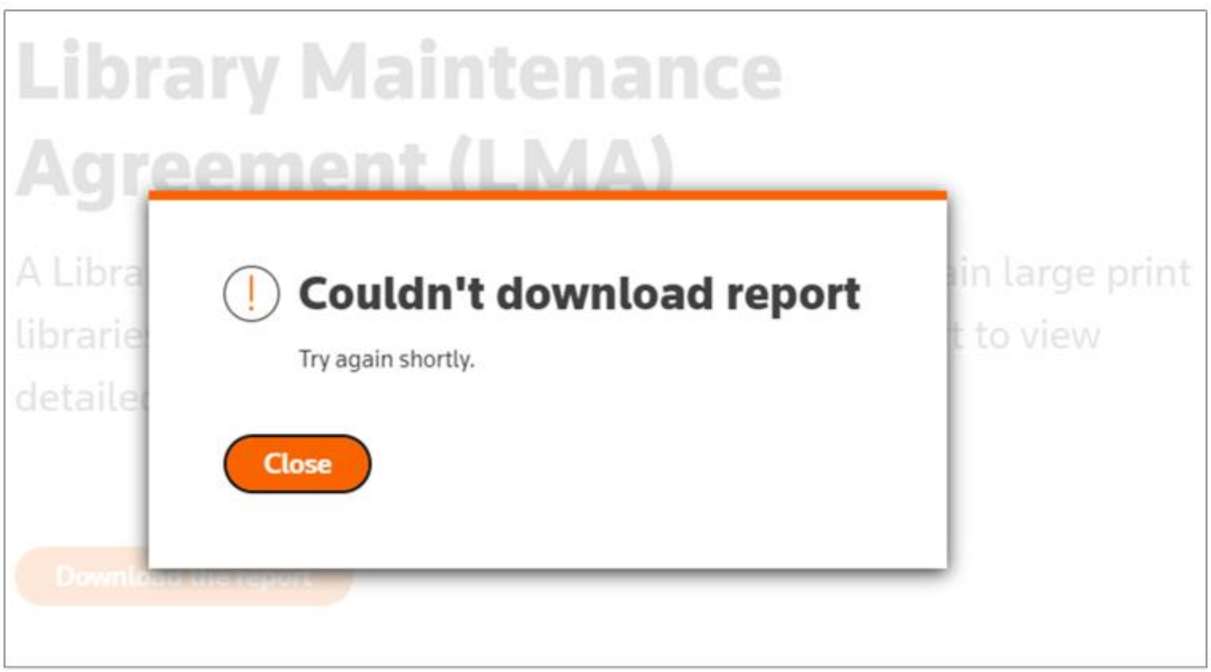
Failure to Download Invoice

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



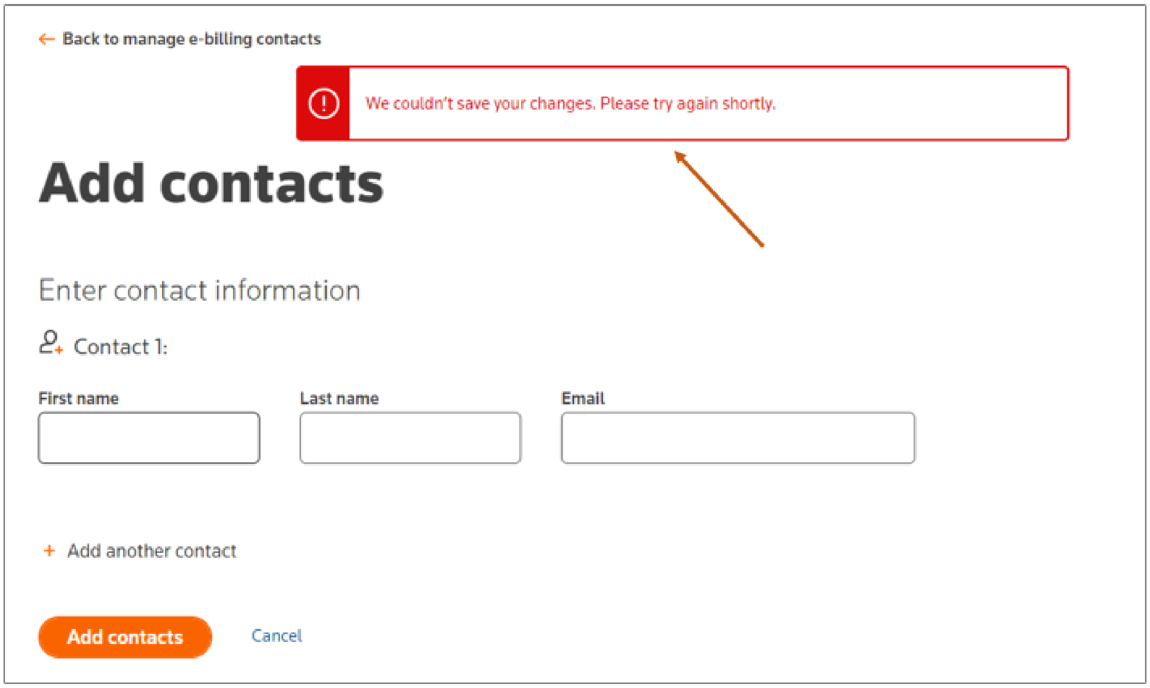
Failure to Download Library Maintenance Agreement

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



Failure to Save E-billing Contact Change

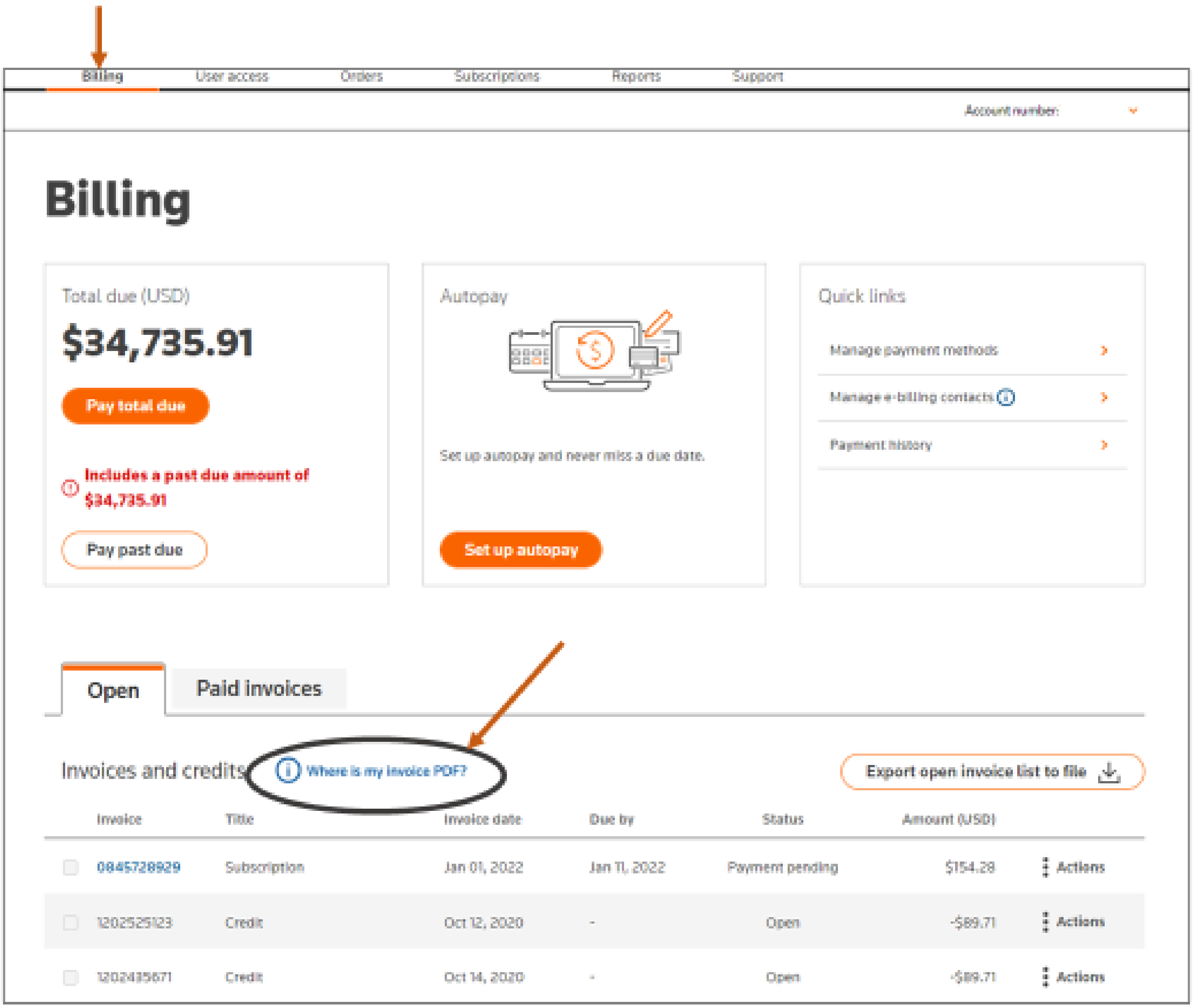
If an e-billing contact change does not save properly, you will see a red box display similar to the one below. You will need to repeat the process and make the changes again.



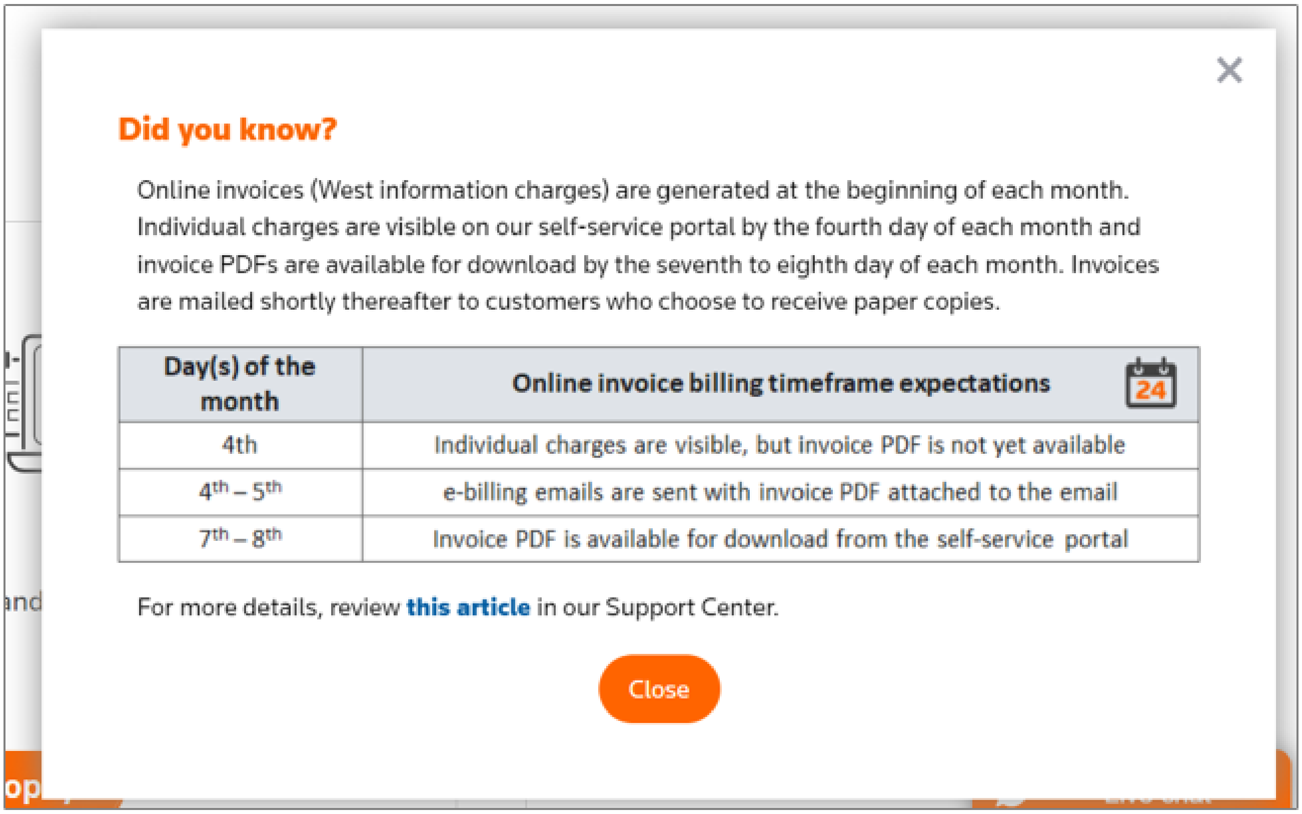
Missing Invoice

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

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



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



Did you know?

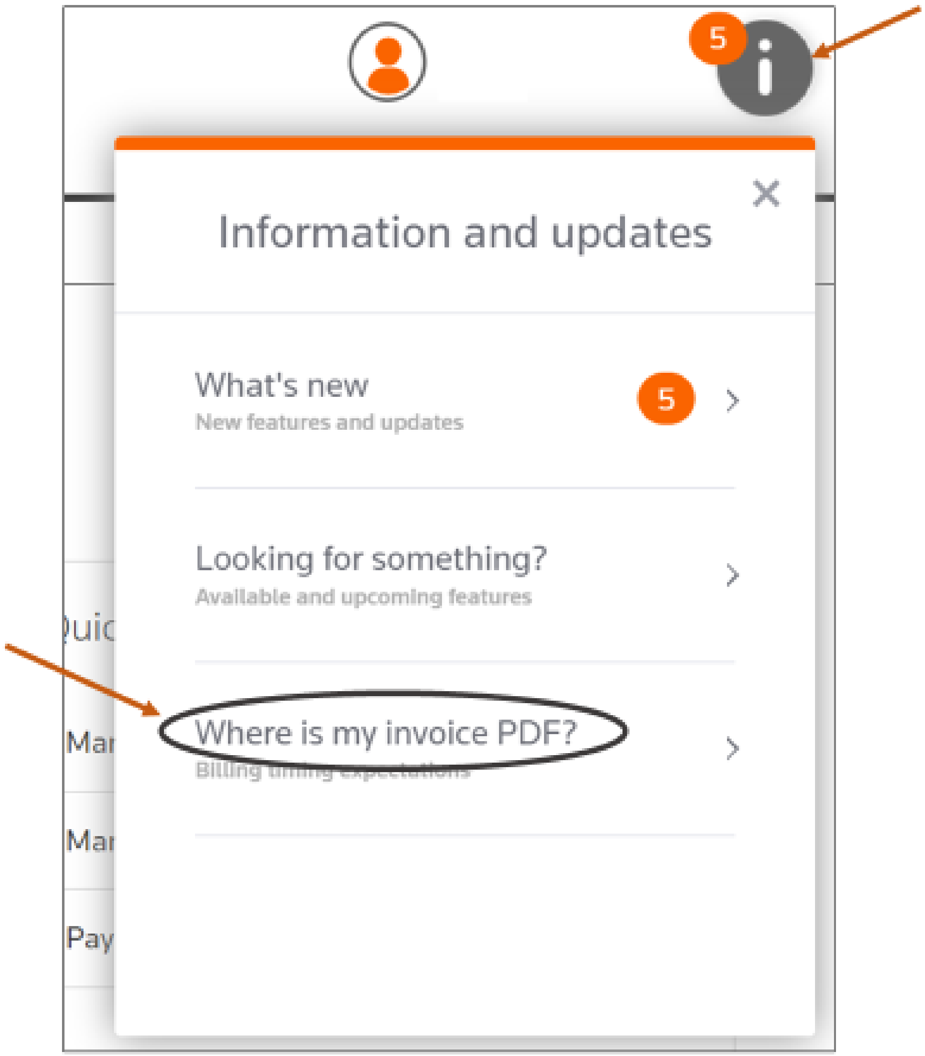
Online invoices (West information charges) are generated at the beginning of each month. Individual charges are visible on our self-service portal by the fourth day of each month and invoice PDFs are available for download by the seventh to eighth day of each month. Invoices are mailed shortly thereafter 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
4th – 5th	e-billing emails are sent with invoice PDF attached to the email
7th – 8th	Invoice PDF is available for download from the self-service portal

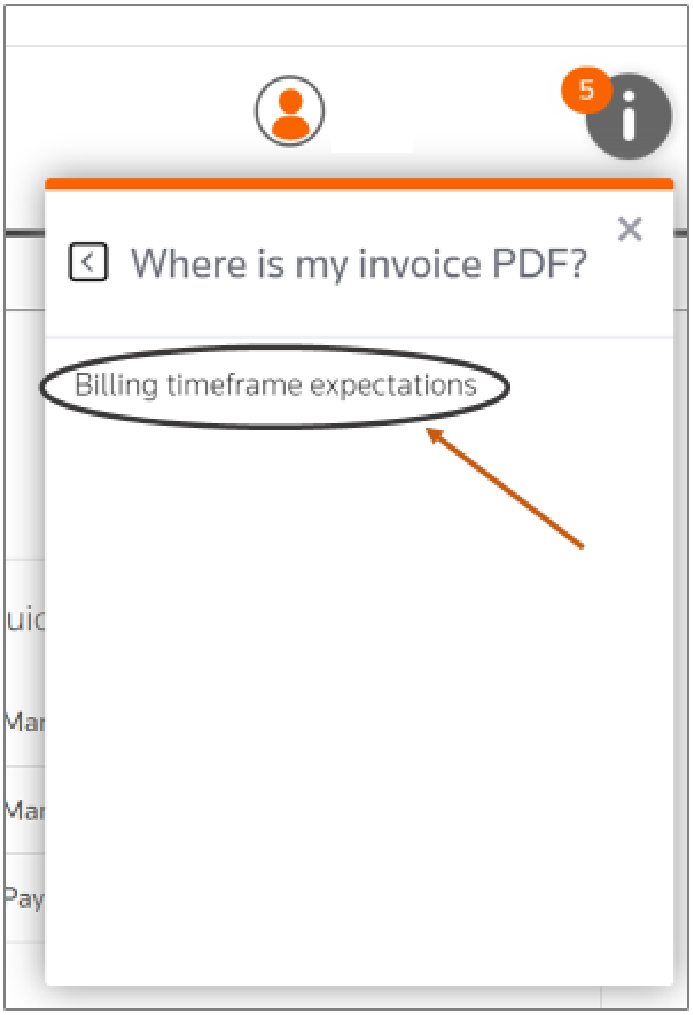
For more details, review **this article** in our Support Center.

Close

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



Next, click **Billing timeframe expectations**.



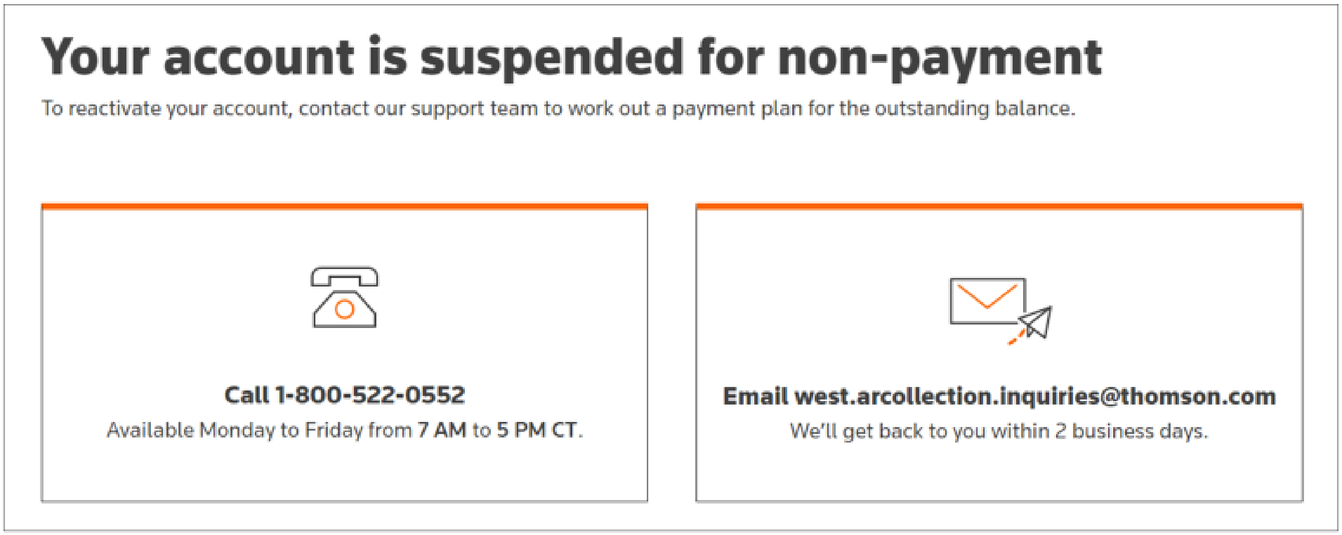
Then, view the **Did you know** popup window (displayed in above).

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.



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).