

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	5
Sign-in	5
Terms and Conditions	7
BILLING & PAYMENTS.....	9
View Balances and Invoices	9
List of Invoices and Credits (Open).....	9
List of Invoices (Paid).....	11
View Invoice Details	12
QuickView (View Westlaw Usage Details).....	14
Download Invoice (PDF)	16
Export Open Invoice List to File.....	20
Export Paid Invoice List to File.....	23
Make Payments	25
Pay total due, select invoices, or past due amounts	25
Make a Partial Payment	36
Manage Autopay	41
Set up Autopay.....	42
Turn Off Autopay.....	46
Dispute an Invoice	47
View Payment History	54
Manage Payment Methods	56
Add a Payment Method	57
Save a Payment Method	59

Edit a Payment Method	60
Delete a Payment Method	62
Manage e-Billing Contacts.....	64
Add an e-Billing Contact.....	64
Edit an e-Billing Contact	67
Delete an e-Billing Contact.....	68
USER MANAGEMENT TASKS.....	70
View Users.....	70
View Product Users	70
View Admin Users	71
Search for Product or Admin Users.....	72
Filter Users	73
Export List of Users to File.....	76
Get a Report of Users.....	80
Manage Product Users.....	85
View and Edit User Details	85
Add Users	89
Remove Users	99
Send/Resend Product Registration Links.....	105
Reset Password for a User	112
Edit Product Access (Add/Remove Product Access)	116
Add Additional Seats	122
Manage Administrative Users.....	124
View and Edit Administrator User Details	124
Add Administrator Users.....	130
Remove an Admin User.....	138
Resend Invitation to an Admin User.....	139
Reset Password for and Admin User	142
ORDERS	145
View Print Order.....	145
Returning Items (Start a return)	147
Return Policy.....	151
Reshipping Items (Start a Reship Request)	153

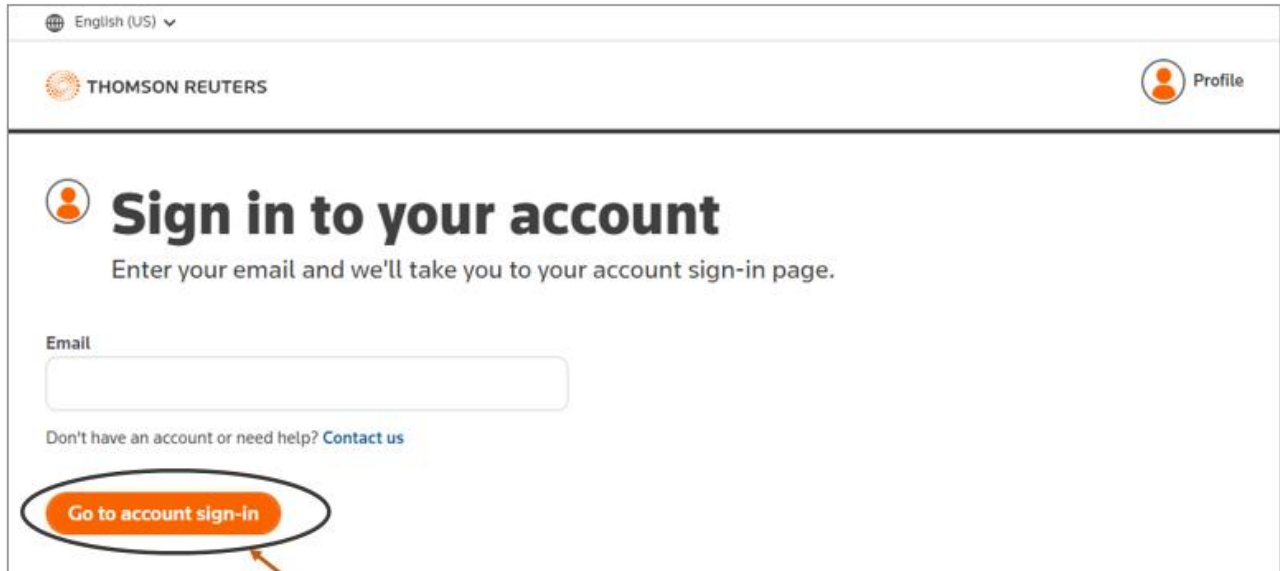
Remove an Item	156
Edit Shipping Address	157
Change Shipping Method	159
REPORTS.....	161
Shipping History Report	162
Create a Shipping History Report	164
User List Report.....	168
Library Maintenance Agreements.....	168
Account Reconciliation Report.....	170
Create an Account Reconciliation Report	171
MANAGE YOUR PROFILE	175
View Profile, Manage Sign In or Sign Out.....	175
Profile.....	175
Manage Sign In.....	177
<i>OnePass PROFILE</i>	178
<i>OnePass PRODUCTS</i>	180
<i>OnePass SECURITY</i>	181
Sign-out.....	182
INFORMATION AND UPDATES.....	183
What's new	184
Looking for something?.....	185
SUPPORT	187
Submit a Ticket.....	187
Live Chat.....	192
TROUBLESHOOTING & FAQs	193
Credit Card Error	193
Error Displaying Support Data.....	193
Failure to Download Invoice	194
Failure to Download Library Maintenance Agreement.....	194
Failure to Save E-billing Contact Change.....	195
Missing Invoice.....	196
OnePass Log-in Issue.....	199
Suspended Account / Reactivate Account	200

Unable to Chat with Live Agent.....	201
-------------------------------------	-----

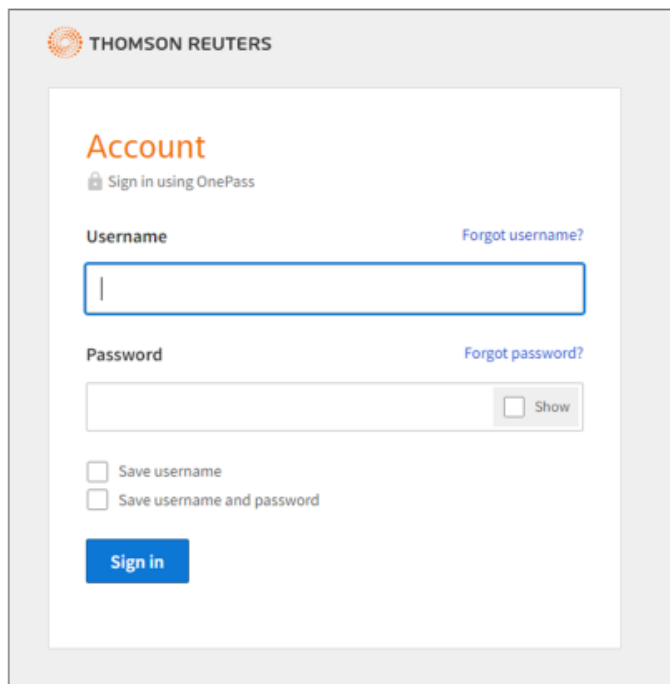
SIGN-IN TO SELF-SERVICE PORTAL

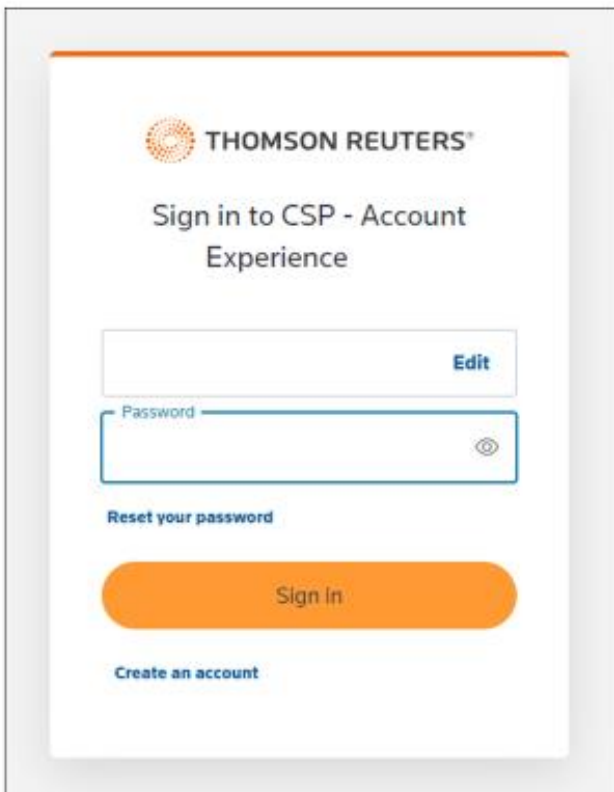
Sign-in

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**.



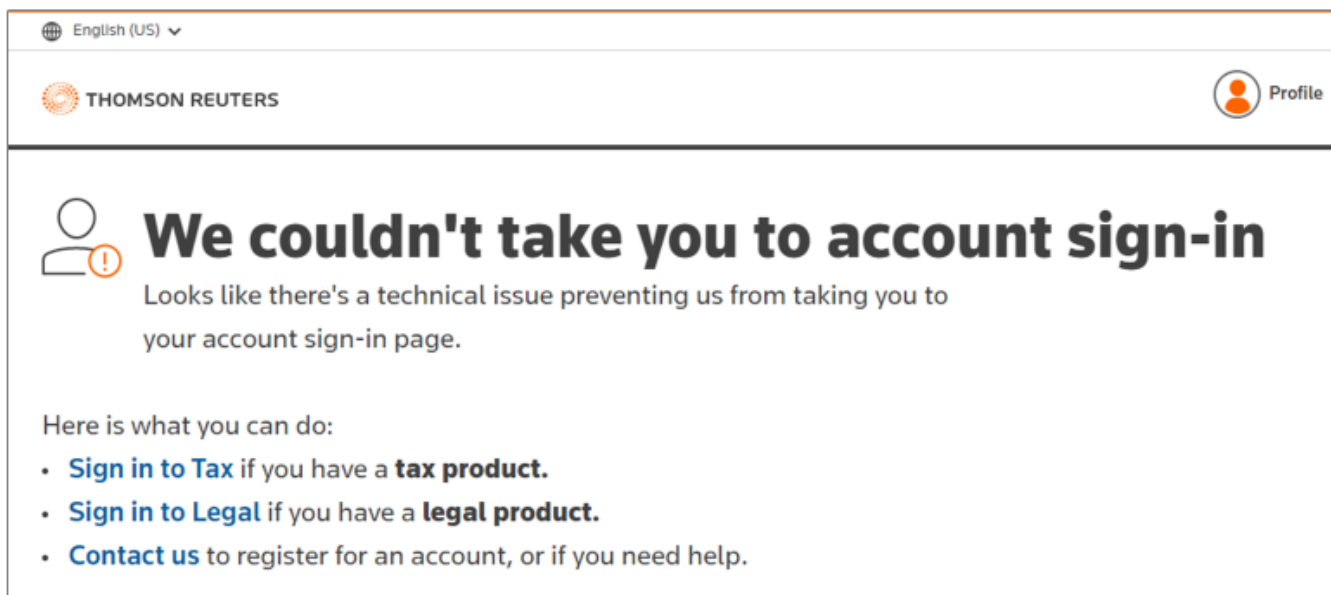
Next, sign-in to your account as prompted. Note, legal product customers (eDiscovery Point, Firm Central, Practical Law, Westlaw) will login using their OnePass account (similar to the first image below), while tax product customers (Checkpoint, CS Professional Suite, ONESOURCE, Onvio) will login using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





The screenshot shows a sign-in page for the Thomson Reuters CSP - Account Experience. At the top is the Thomson Reuters logo. Below it, the text "Sign in to CSP - Account Experience" is centered. There are two input fields: a username field with an "Edit" link to its right, and a password field with a toggle icon to its right. Below the password field is a link that says "Reset your password". A large orange "Sign In" button is centered below the links. At the bottom, there is a link that says "Create an account".

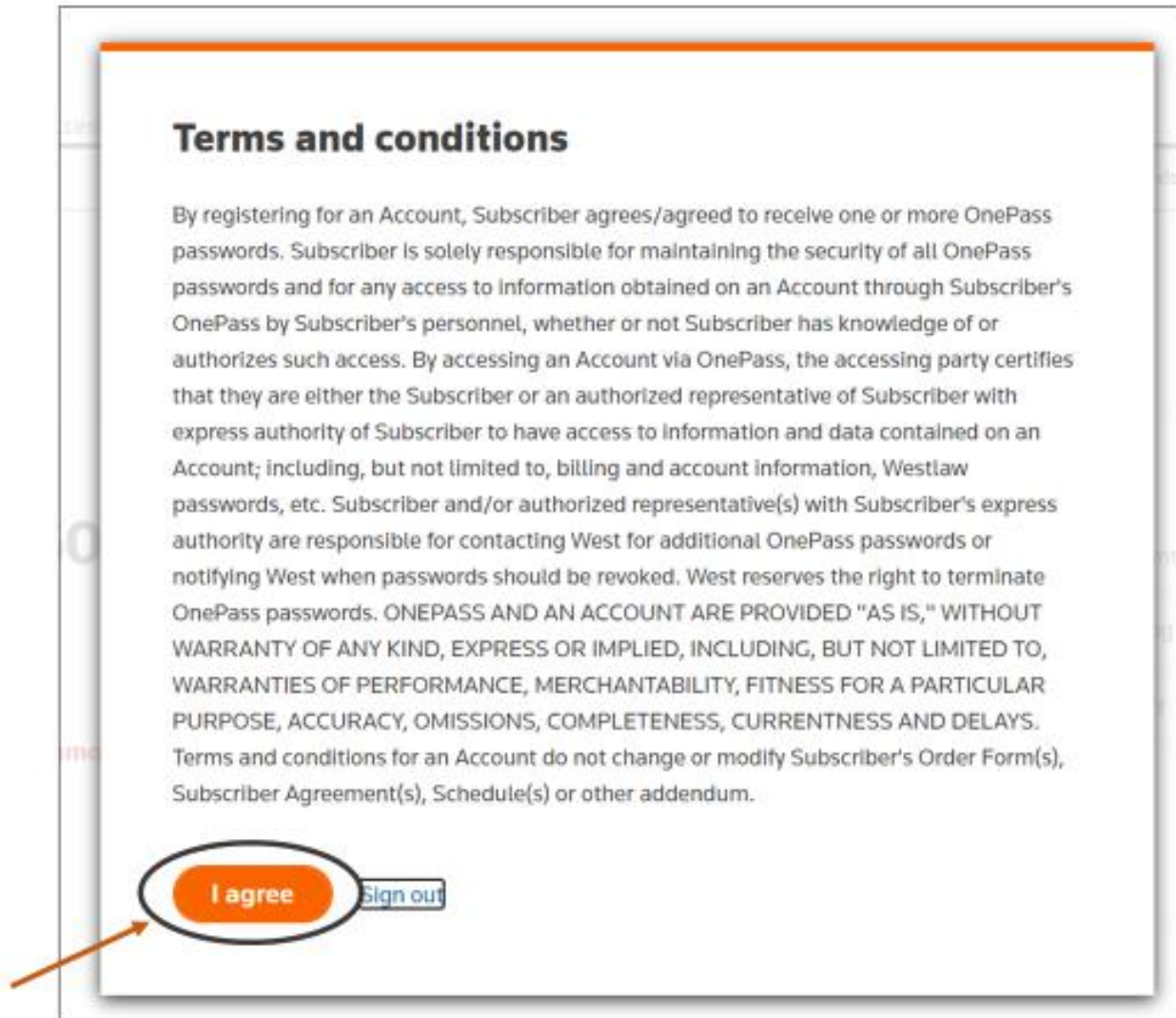
If your email address is not recognized, you will see a window similar to the below. To sign-in from here, click on the relevant link (**Sign in to Tax / Sign in to Legal**). If you do not have an account, click the **Contact us** link.



The screenshot shows an error message in the Thomson Reuters portal. At the top, there is a language selector set to "English (US)" and a "Profile" link with a user icon. The main content area has a heading "We couldn't take you to account sign-in" next to a user icon with an exclamation mark. Below the heading, it says "Looks like there's a technical issue preventing us from taking you to your account sign-in page." Underneath, it says "Here is what you can do:" followed by a list of three items: "Sign in to Tax if you have a **tax product**.", "Sign in to Legal if you have a **legal product**.", and "Contact us to register for an account, or if you need help."

Terms and Conditions


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



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

Updated terms and conditions

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

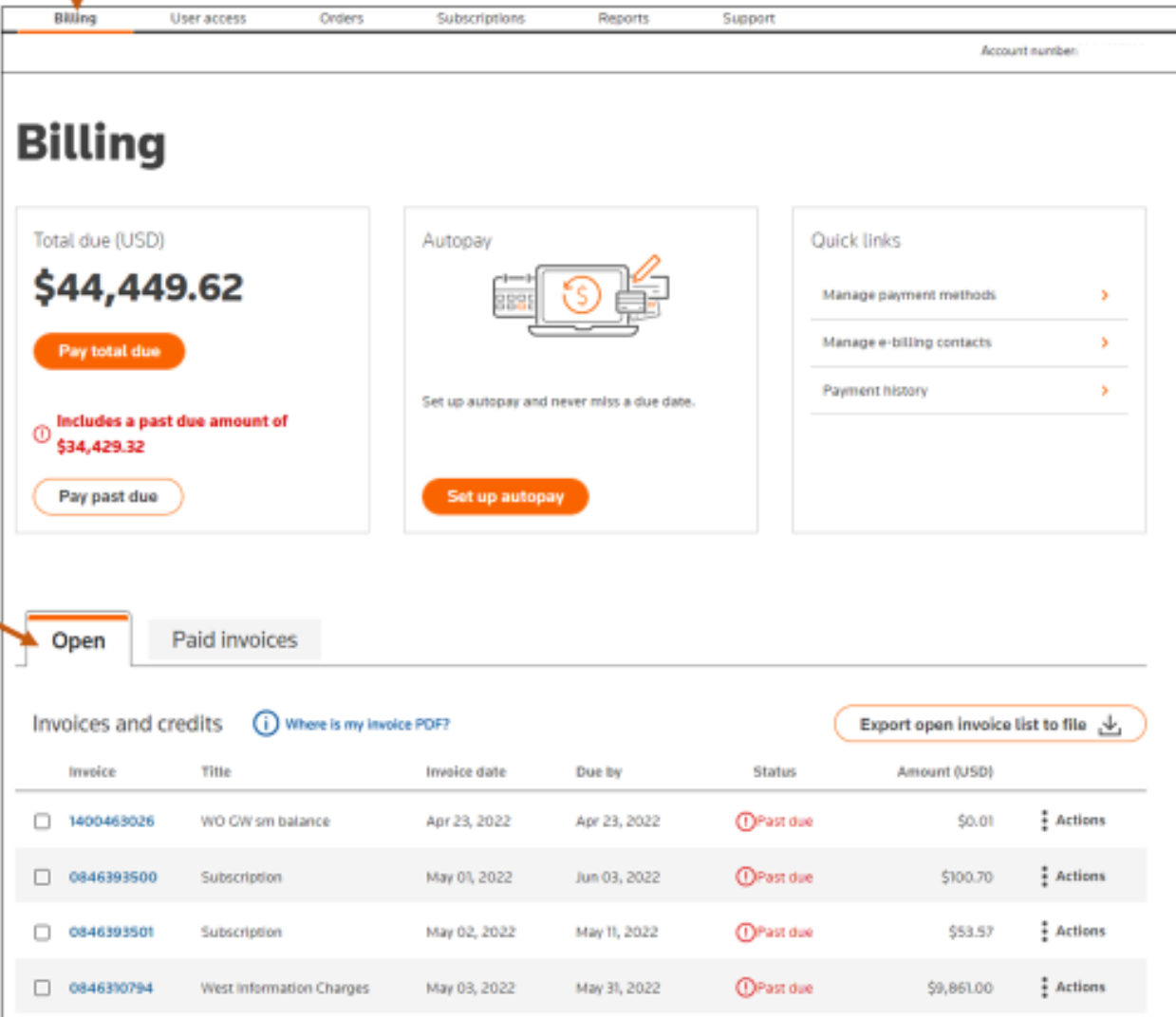


BILLING & PAYMENTS

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.



Billing User access Orders Subscriptions Reports Support Account number

Billing

Total due (USD)
\$44,449.62

[Pay total due](#)

Includes a past due amount of \$34,429.32

[Pay past due](#)

Autopay

Set up autopay and never miss a due date.

[Set up autopay](#)

Quick links

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

Open Paid invoices

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

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

Open

Paid invoices

Invoices and credits

Export open invoice list to file

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

Viewing 1 - 10

< Previous

123

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.

Billing User access Orders Reports Support

Account number:

Billing

Your account is up to date

No payment due

Autopay

Set up autopay and never miss a due date.

Set up autopay

Quick links

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

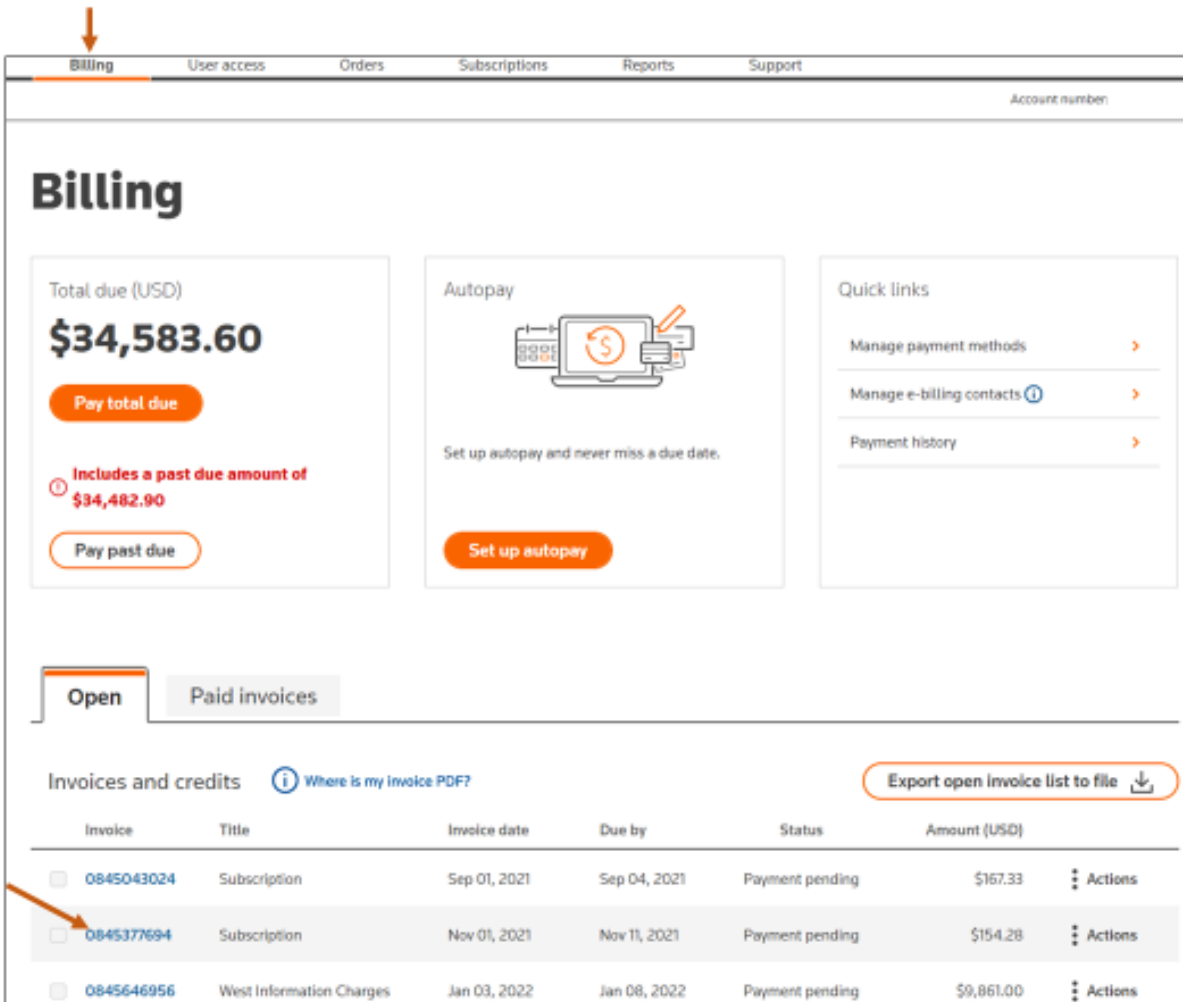
Open **Paid invoices**

Invoices Export paid invoice list to file

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

View Invoice Details

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



Billing User access Orders Subscriptions Reports Support Account number

Billing

Total due (USD)
\$34,583.60

[Pay total due](#)

Includes a past due amount of \$34,482.90

[Pay past due](#)

Autopay

Set up autopay and never miss a due date.

[Set up autopay](#)

Quick links

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

Open Paid invoices

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

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

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



Open Paid invoices

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

Invoice	Title	Invoice date	Due by	Status	Amount (USD)	Actions
<input type="checkbox"/> 0845543364	Subscription	Dec 01, 2021	Dec 11, 2021	Past due		⋮ Actions
<input type="checkbox"/> 0844389694	Partial Balance	Dec 07, 2021	May 04, 2021	Past due		⋮ Actions
<input type="checkbox"/> 0845459756	Partial Balance	Jan 24, 2022	Dec 08, 2021	Past due	\$3,167.88	⋮ Actions

Pay invoice
View details
Download invoice

Then, view invoice.

[← Back to billing](#)

Invoice 0845543

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

Selected amount (USD)

\$154.28

[Pay amount](#)

Details

Total amount: **\$154.28**

Due by: **Dec 12, 2021**

Invoice issued: **Dec 01, 2021**

[Report a problem](#)

Account name:

Account number:

610 OPPERMAN DR,
EAGAN, VT, USA,
32103

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

QuickView (View Westlaw Usage Details)

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

[← Back to billing](#)

Invoice 084564

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

Selected amount (USD)

\$9,861.00

[Pay amount](#)

Details

Total amount: **\$9,861.00**

Due by: **Jan 08, 2022**

Invoice issued: **Jan 03, 2022**

[Report a problem](#)


Account name:

Account number:

610 OPPERMAN DR,
EAGAN, VT, USA,
32103

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

Posting number: ~~614500~~

[Show itemized charges in QuickView+](#) 

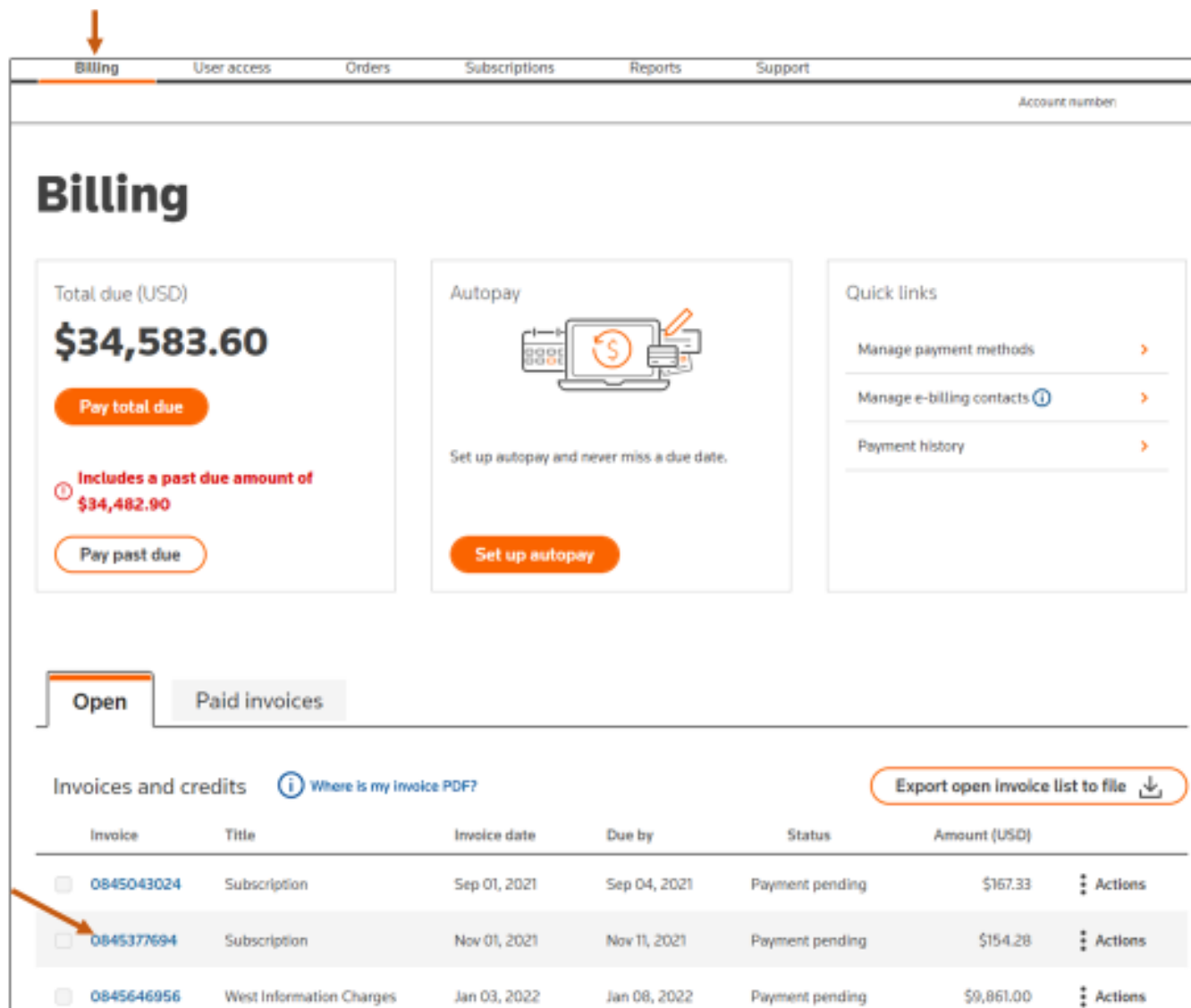
Subscription charges:	\$9,861.00	<h3>Pay charge</h3> <table> <tbody> <tr> <td>Amount</td> <td>\$9,861.00</td> </tr> </tbody> </table>	Amount	\$9,861.00
Amount	\$9,861.00			
Out of plan charges:	\$0.00			
Tax:	\$0.00			
Total:	\$9,861.00			

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



Download Invoice (PDF)

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



Billing User access Orders Subscriptions Reports Support Account number

Billing

Total due (USD)
\$34,583.60

Pay total due

Includes a past due amount of \$34,482.90

Pay past due

Autopay

Set up autopay and never miss a due date.

Set up autopay

Quick links

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

Open Paid invoices

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

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

Billing

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)	
<input type="checkbox"/> 0845043024	Subscription	Sep 01, 2021	Sep 04, 2021	Payment pending	\$167.33	⋮ Actions
<input type="checkbox"/> 0845377694	Subscription	Nov 01, 2021	Nov 11, 2021	Payment pending		⋮ Actions
<input type="checkbox"/> 0845646956	West Information Charges	Jan 03, 2022	Jan 06, 2022	Payment pending	\$9,861.00	⋮ Actions

Billing

Account number:

Billing

Total due (USD)
\$34,583.60

Pay total due

Includes a past due amount of
\$34,482.90

Pay past due

Autopay

Set up autopay and never miss a due date.

Set up autopay

Quick links

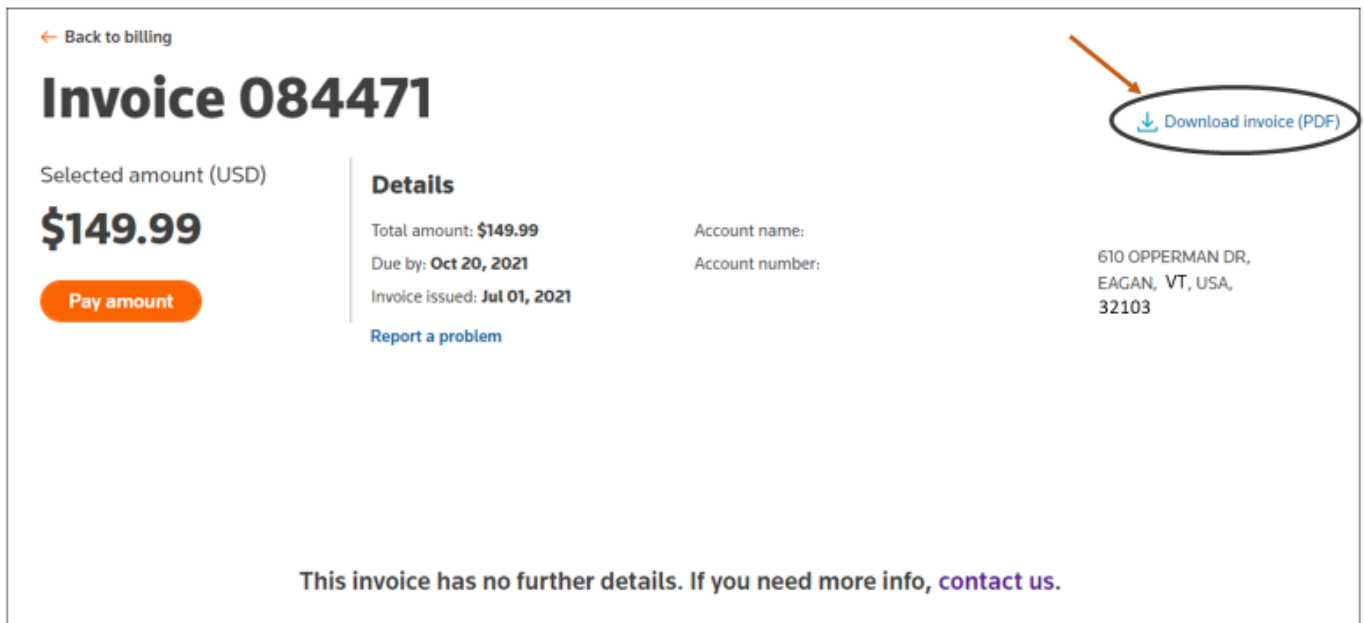
- Manage payment methods
- Manage e-billing contacts
- Payment history

Open Paid invoices

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

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

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



← Back to billing

Invoice 084471

Selected amount (USD)
\$149.99

[Pay amount](#)

Details

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

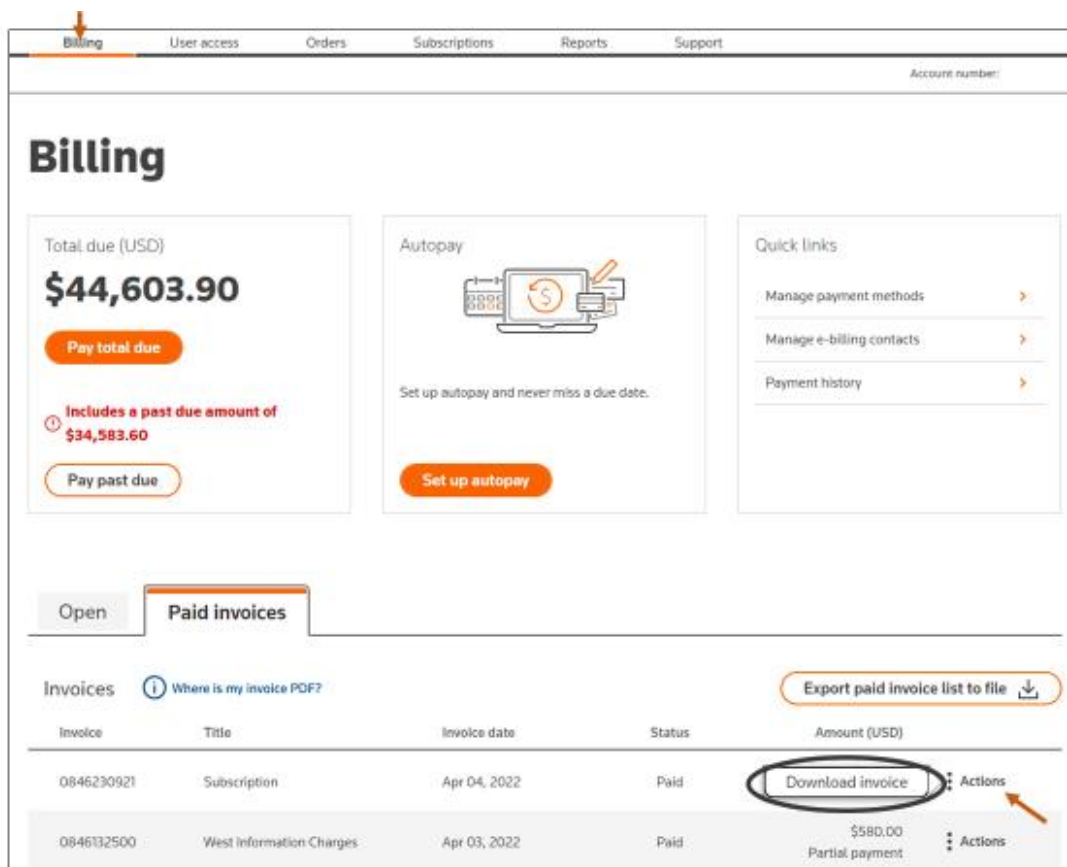
Account name:
Account number:

610 OPPERMAN DR,
EAGAN, VT, USA,
32103

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

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

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



Billing | User access | Orders | Subscriptions | Reports | Support

Account number:

Billing

Total due (USD)
\$44,603.90

[Pay total due](#)

Includes a past due amount of **\$34,583.60**

[Pay past due](#)

Autopay

Set up autopay and never miss a due date.

[Set up autopay](#)

Quick links

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

Paid invoices

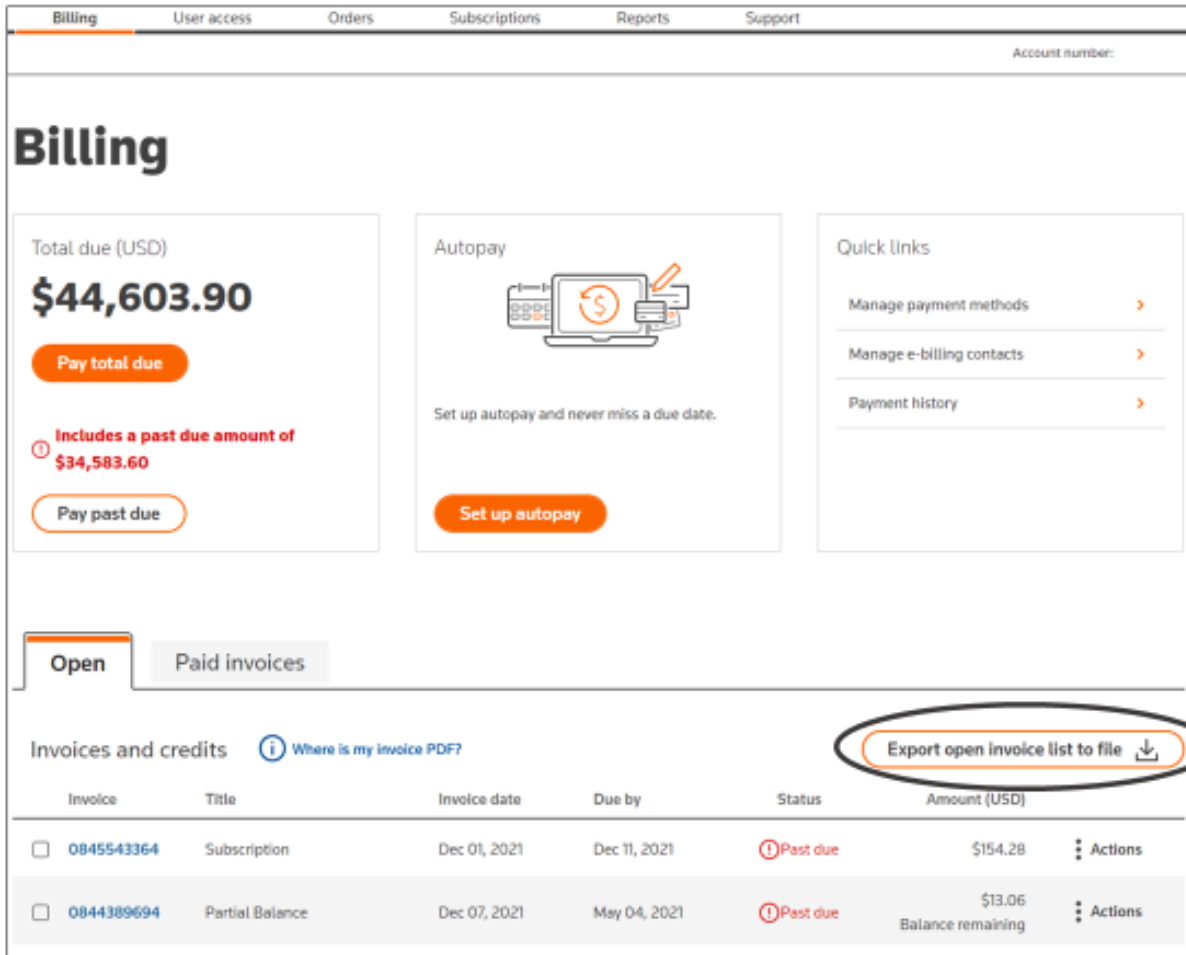
[Open](#)

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

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

Export Open Invoice List to File

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



Billing

Account number:

Total due (USD)
\$44,603.90

Pay total due

Includes a past due amount of \$34,583.60

Pay past due

Autopay

Set up autopay and never miss a due date.


Set up autopay



Quick links

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

Open Paid invoices

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

Export open invoice list to file 

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

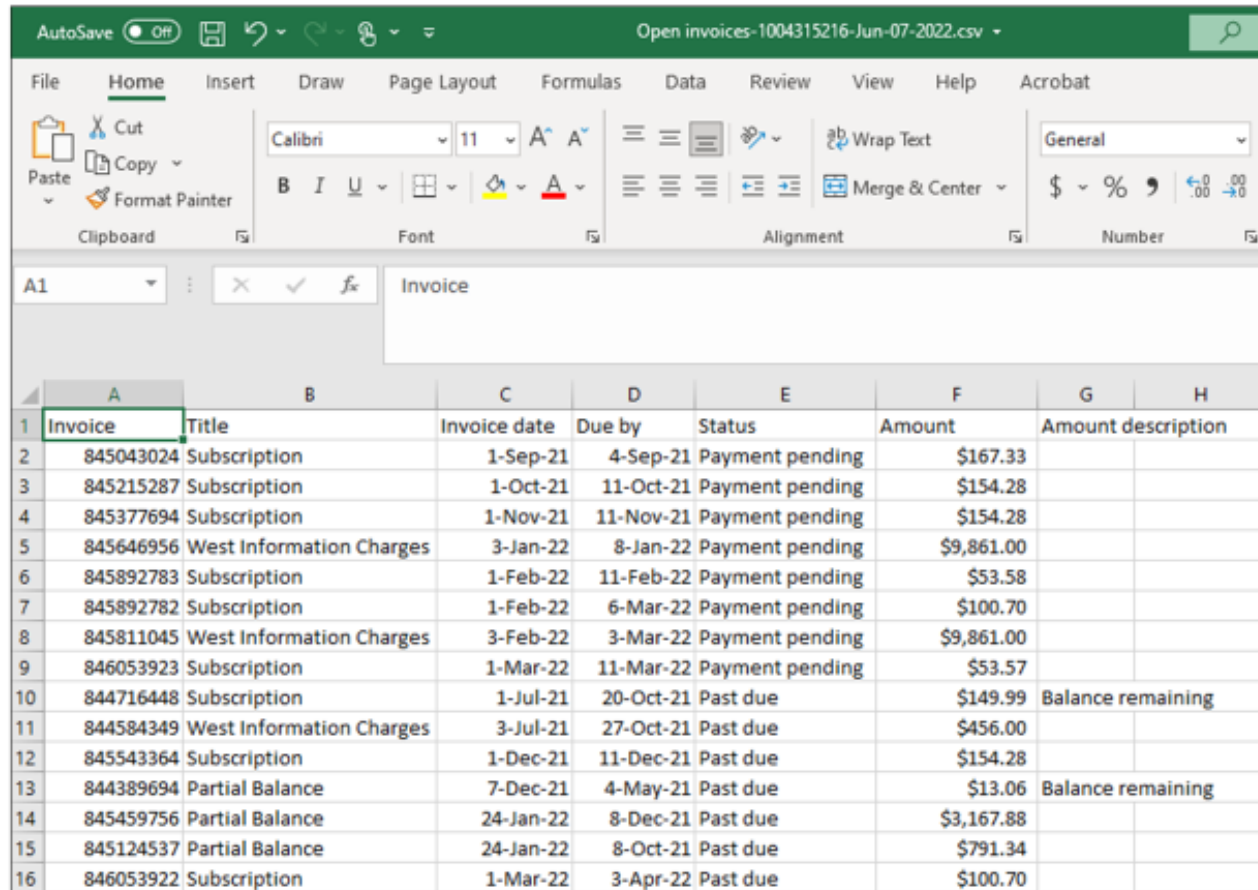
After clicking Export open invoice list to file, you will see blue and green status bars popup similar to the ones below. When the download completes, a **file exported** box will appear.

The screenshot displays the 'Billing' section of the portal. At the top, a navigation bar includes 'Billing' (highlighted with an orange arrow), 'User access', 'Orders', 'Subscriptions', 'Reports', and 'Support'. Below this, the 'Billing' header is prominent. The main content area is divided into three columns: 'Total due (USD)' showing '\$44,603.90' with a 'Pay total due' button and a note about a past due amount of '\$34,583.60'; 'Autopay' with a 'Set up autopay' button; and 'Quick links' for payment methods, e-billing contacts, and payment history.

Below the main content, there are tabs for 'Open' (selected) and 'Paid invoices'. Under the 'Open' tab, the 'Invoices and credits' section is visible. It includes a table with columns for 'Invoice', 'Title', 'Invoice date', 'Due by', 'Status', and 'Amount (USD)'. Two rows are shown: one for a 'Subscription' and another for a 'Partial Balance'. Two status notifications are overlaid on the table: a blue one stating 'Preparing open invoice list for download. File will download when ready.' and a green one stating 'Open Invoices list successfully downloaded. Please check downloads folder.' These notifications are circled in black. To the right of the table, a 'File exported' button with a checkmark is highlighted by an orange arrow.

Invoice	Title	Invoice date	Due by	Status	Amount (USD)	Actions
0845543364	Subscription				\$154.28	⋮ Actions
0844286694	Partial Balance			Due	\$13.06	⋮ Actions

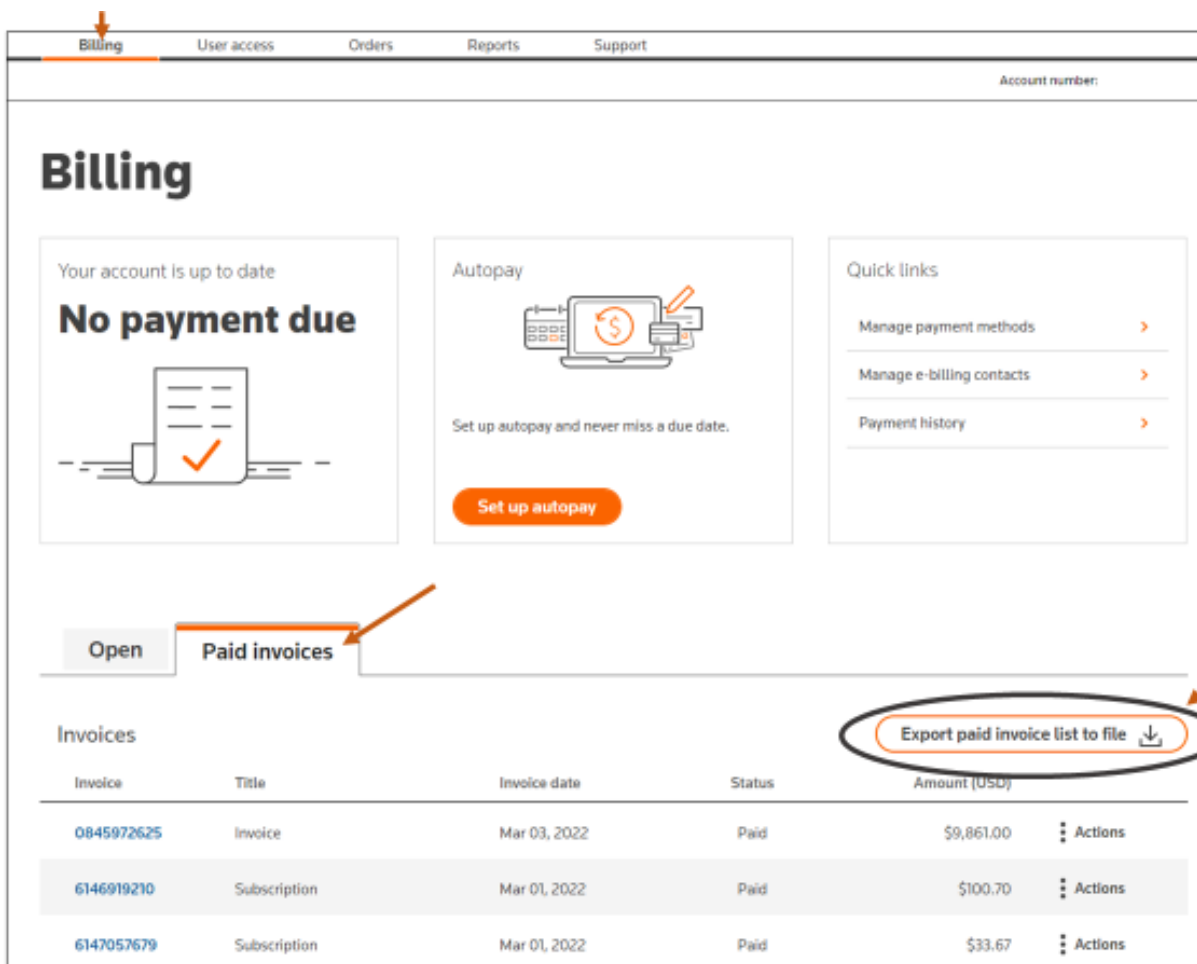
Once the green status box appears, open the download. The file will open as an Excel spreadsheet that looks similar to the one below. **Note, you may need to adjust the column widths to properly view the data.**



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**.



Billing

Your account is up to date

No payment due

Autopay

Set up autopay and never miss a due date.

[Set up autopay](#)

Quick links

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

Account number:

Invoices

[Open](#) **Paid invoices**

[Export paid invoice list to file](#)

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

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

Billing

Your account is up to date

No payment due

Autopay

Set up autopay and never miss a due date.

Set up autopay

Quick links

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

Open Paid invoices

Invoices

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

Preparing paid invoice list for download. File will download when ready.

Paid invoices list successfully downloaded. Please check downloads folder.

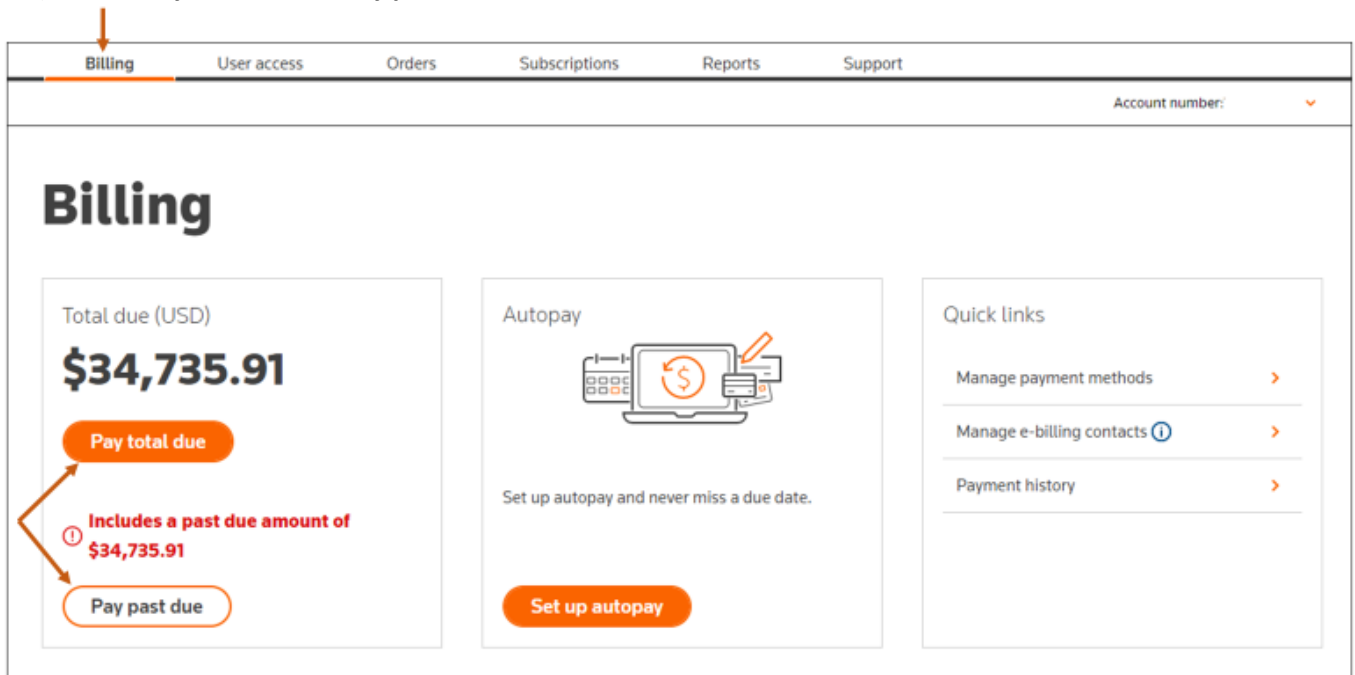
File exported ✓

Make Payments

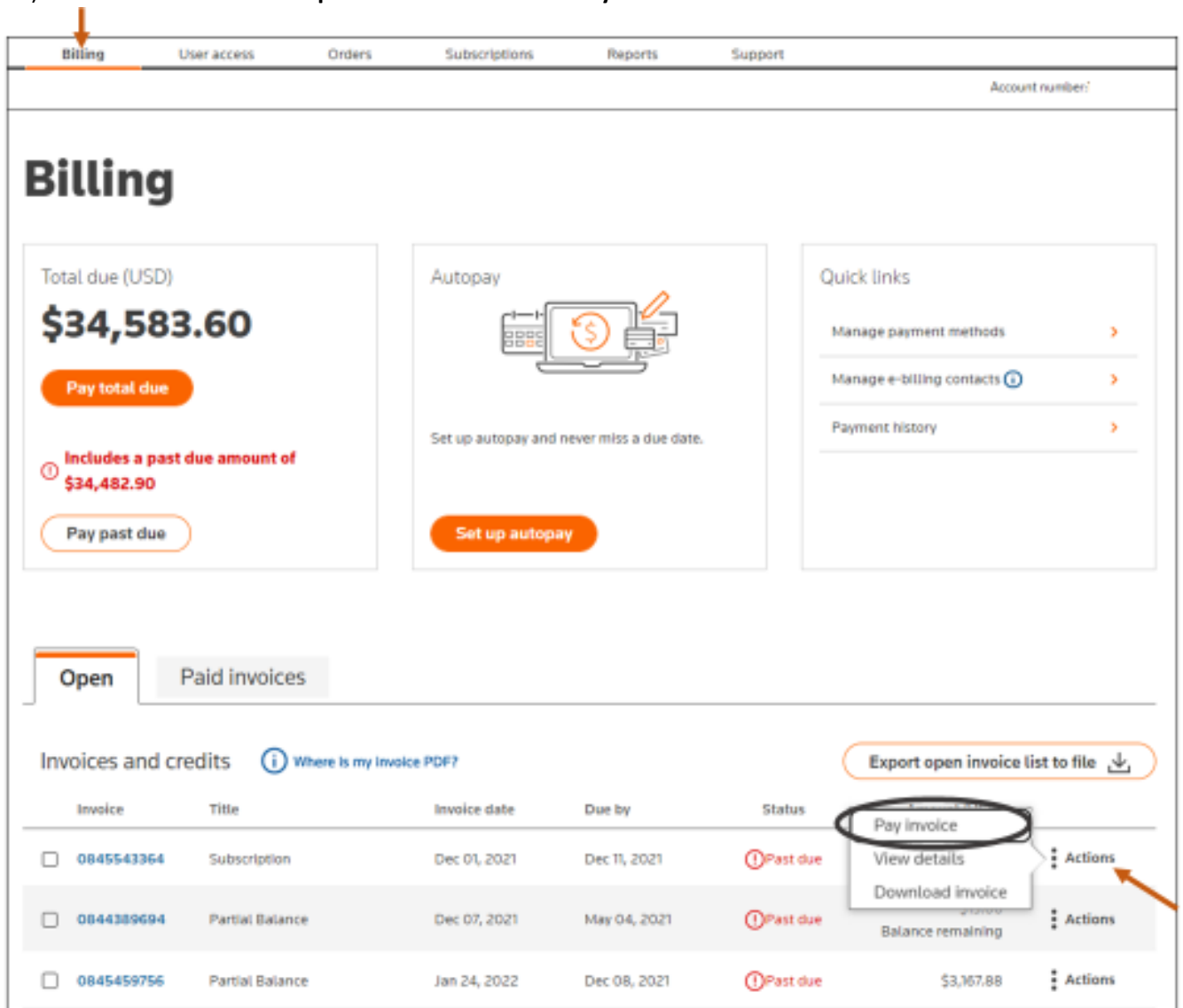
Pay total due, select invoices, or past due amounts

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

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



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



Billing User access Orders Subscriptions Reports Support Account number:

Billing

Total due (USD)
\$34,583.60

Pay total due

Includes a past due amount of \$34,482.90

Pay past due

Autopay

Set up autopay and never miss a due date.

Set up autopay

Quick links

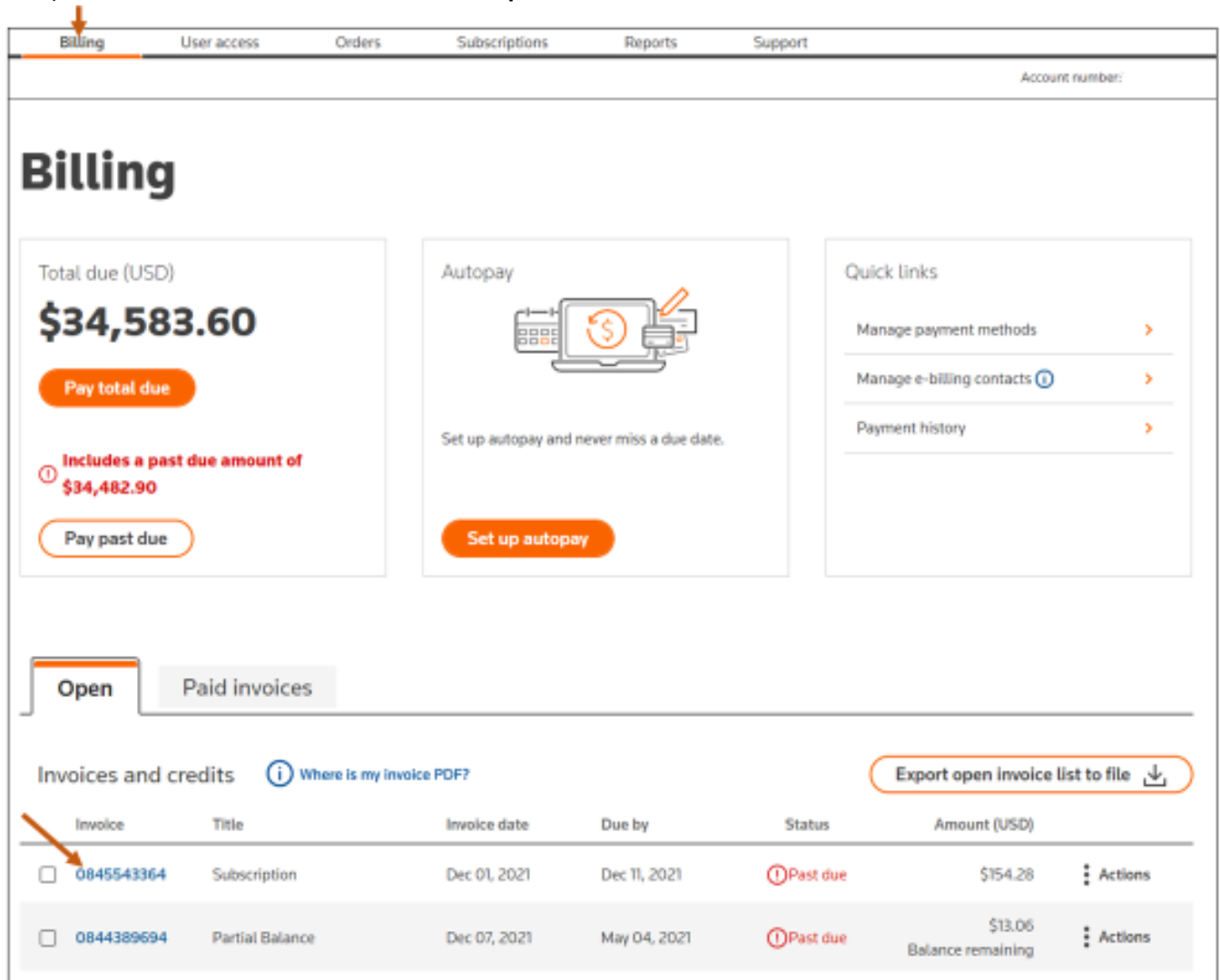
- Manage payment methods >
- Manage e-billing contacts ⓘ >
- Payment history >

Open Paid invoices

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

Invoice	Title	Invoice date	Due by	Status	Actions
<input type="checkbox"/> 0845543364	Subscription	Dec 01, 2021	Dec 11, 2021	① Past due	<div> <div>Pay invoice</div> <div>View details</div> <div>Download invoice</div> <div>Balance remaining</div> </div>
<input type="checkbox"/> 0844389694	Partial Balance	Dec 07, 2021	May 04, 2021	① Past due	<div> <div>Actions</div> </div>
<input type="checkbox"/> 0845459756	Partial Balance	Jan 24, 2022	Dec 08, 2021	① Past due	<div> <div>Balance remaining</div> <div>\$3,167.88</div> <div>Actions</div> </div>

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



Billing

Account number:

Total due (USD)
\$34,583.60
 Pay total due

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

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

Open Paid invoices

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

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

Next, click **Pay amount**.

[← Back to billing](#)

Invoice 0845543

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

Selected amount (USD)

\$154.28

Pay amount

Details

Total amount: **\$154.28**

Due by: **Dec 12, 2021**

Invoice issued: **Dec 01, 2021**

[Report a problem](#)

Account name:

Account number:

610 OPPERMAN DR,
EAGAN, VT, USA,
32103

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

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

The screenshot displays the 'Open' invoices tab in the Thomson Reuters Self-Service Portal. The interface includes a header with 'Open' and 'Paid invoices' tabs, a search bar, and an 'Export open invoice list to file' button. Below the header is a table of invoices with columns: Invoice, Title, Invoice date, Due by, Status, Amount (USD), and Actions. The first invoice, 0845543364, is highlighted in yellow and has its checkbox selected, indicated by an orange arrow. The bottom of the screen shows a summary bar with '1 selected: \$154.28 USD total' and a 'Pay now' button circled in orange.

Invoice	Title	Invoice date	Due by	Status	Amount (USD)	Actions
<input checked="" type="checkbox"/> 0845543364	Subscription	Dec 01, 2021	Dec 11, 2021	1 Past due	\$154.28	⋮ Actions
<input type="checkbox"/> 0844389694	Partial Balance	Dec 07, 2021	May 04, 2021	1 Past due	\$13.06 Balance remaining	⋮ Actions
<input type="checkbox"/> 0845459756	Partial Balance	Jan 24, 2022	Dec 08, 2021	1 Past due	\$3,767.88	⋮ Actions
<input type="checkbox"/> 0845124537	Partial Balance	Jan 24, 2022	Oct 08, 2021	1 Past due	\$791.34	⋮ Actions
<input type="checkbox"/> 0846053922	Subscription	Mar 01, 2022	Apr 03, 2022	1 Past due	\$100.70	⋮ Actions
<input type="checkbox"/> 0845972625	West Information Charges	Mar 03, 2022	Mar 31, 2022	1 Past due	\$9,861.00	⋮ Actions
<input type="checkbox"/> 6145032761	Partial Balance	Mar 12, 2022	Dec 06, 2021	1 Past due	\$284.52 Balance remaining	⋮ Actions
<input type="checkbox"/> 0846230921	Subscription	Apr 01, 2022	May 04, 2022	1 Past due	\$100.70 Balance remaining	⋮ Actions
<input type="checkbox"/> 0846230922	Subscription	Apr 01, 2022	Apr 11, 2022	1 Past due	\$53.57	⋮ Actions
<input type="checkbox"/> 0846132500	Partial Balance	Apr 20, 2022	May 01, 2022	1 Past due	\$9,281.00 Balance remaining	⋮ Actions

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

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

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

The screenshot displays the 'Open' invoices tab in the Thomson Reuters Self-Service Portal. The interface shows a list of invoices with columns for Invoice, Title, Invoice date, Due by, Status, and Amount (USD). Three invoices are selected, indicated by orange checkboxes and arrows pointing to them. The bottom of the screen shows a summary of the selected invoices and a 'Pay now' button.

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

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

3 selected: \$958.68 USD total
3 invoices: \$958.68

Pay now X Dismiss

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

Make a payment

[Cancel and go back to billing](#)

1
Payment method

Choose a payment method

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

Payment summary

[View details](#)

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

2
Confirmation

Then, click **Next**.

Make a payment

[Cancel and go back to billing](#)

1
Payment method

Choose a payment method

Next
Cancel

Payment summary

[View details](#)

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

2
Confirmation

Next, click **Pay**.

Make a payment

[Cancel and go back to billing](#)

✓

Payment method
Bank account ending in 5216

2

Confirmation

Total invoice amount

USD \$34,735.91

Credits applied

USD \$0.00

Remaining balance

USD \$34,735.91

Account number

*****5216

Pay

Back

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

Thanks for your payment

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

Your confirmation number is 000357550775.

Back to billing

How would you rate your payment experience

★ ★ ★ ★ ★

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

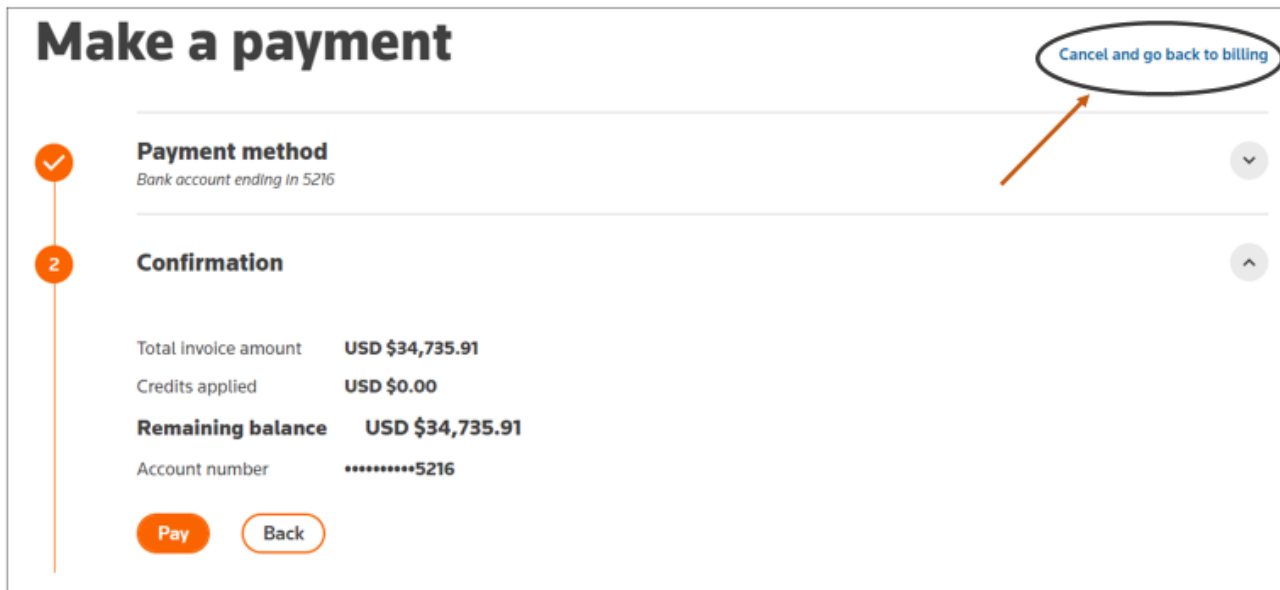
A popup window similar to the one below will provide the summary of payment details.

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

1-10 of 16 items

< Previous 1 2 Next >

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



Make a payment

[Cancel and go back to billing](#)

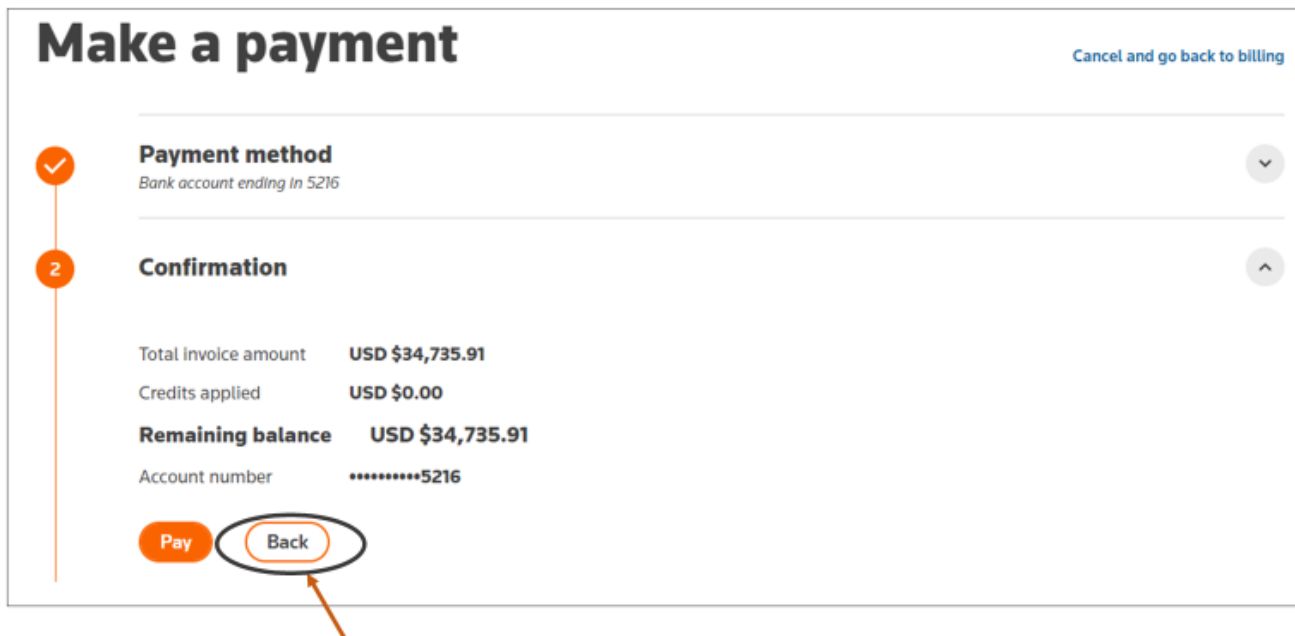
1 **Payment method**
Bank account ending in 5216

2 **Confirmation**

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

Pay **Back**

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



Make a payment

[Cancel and go back to billing](#)

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

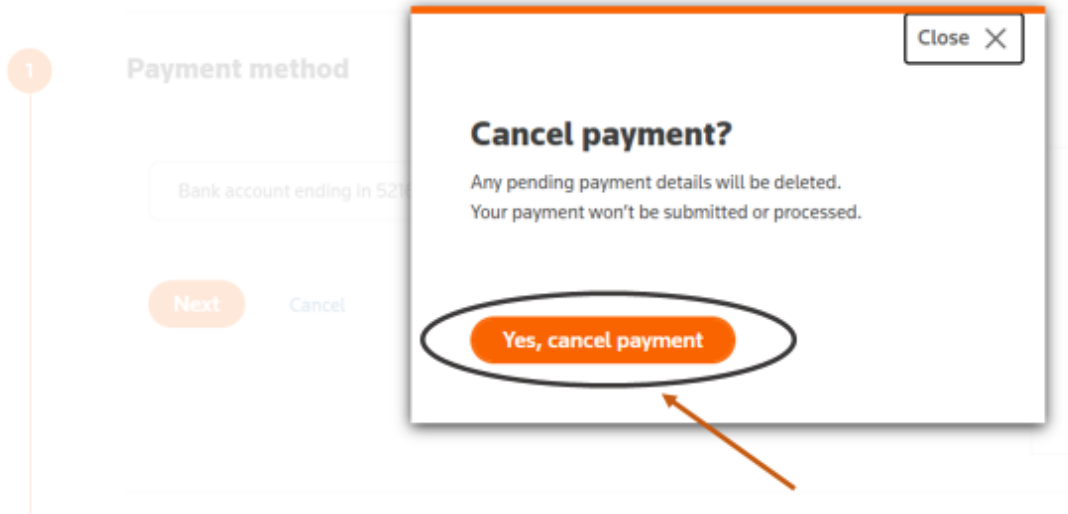
2 **Confirmation**

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

Pay **Back**

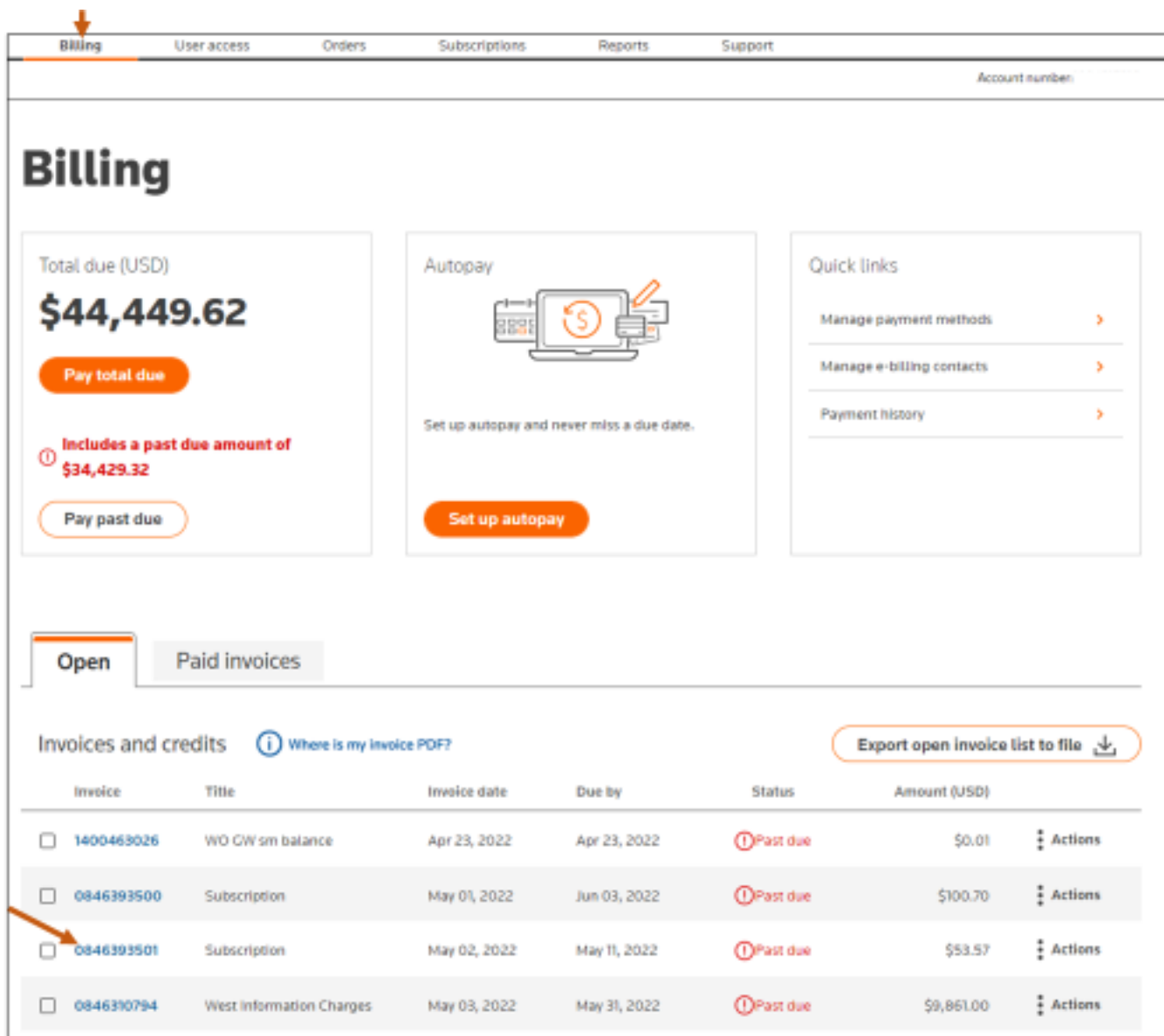
After either action above, click **Yes, cancel payment**.

Make a payment



Make a Partial Payment

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



Billing

Account number: [REDACTED]

Total due (USD)
\$44,449.62

[Pay total due](#)

Includes a past due amount of \$34,429.32

[Pay past due](#)

Autopay

Set up autopay and never miss a due date.

[Set up autopay](#)

Quick links

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

Open **Paid invoices**

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

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

Billing User access Orders Subscriptions Reports Support Account number:

Billing

Total due (USD)


\$44,449.62

[Pay total due](#)

Includes a past due amount of \$34,429.32

[Pay past due](#)

Autopay



Set up autopay and never miss a due date.

[Set up autopay](#)

Quick links

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

Open Paid invoices

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

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

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

[← Back to billing](#)

Invoice 08463

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

Selected amount (USD)

\$53.57

[Pay amount](#)

Details

Total amount: **\$53.57**

Due by: **May 11, 2022**

Invoice issued: **May 02, 2022**

[Report a problem](#)

Account name:

Account number:

610 OPPERMAN DR,
EAGAN, VT, USA,
32103

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

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

[← Back to billing](#)

Invoice 08463

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

Selected amount (USD)

\$53.57

Pay amount

Details

Total amount: **\$53.57**

Due by: **May 11, 2022**

Invoice issued: **May 02, 2022**

[Report a problem](#)

Account name:

Account number:

610 OPPERMAN DR,
EAGAN, VT, USA,
32103

☒

LIBRARY MAINTENANCE AGREEMENT SUB

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

Total: \$33.67

▼

☒

LIBRARY MAINTENANCE AGREEMENT SUB

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

Total: \$13.61

⬆

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

☒

LIBRARY MAINTENANCE AGREEMENT SUB

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

Total: \$6.29

▼

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

← Back to billing

Invoice 08463

Download Invoice (PDF)

Selected amount (USD)
\$39.81

Pay amount

Details

Total amount: \$53.57
Due by: May 11, 2022
Invoice issued: May 02, 2022
[Report a problem](#)

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

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

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

☒ **# LIBRARY MAINTENANCE AGREEMENT SUB** Total: \$6.14

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

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

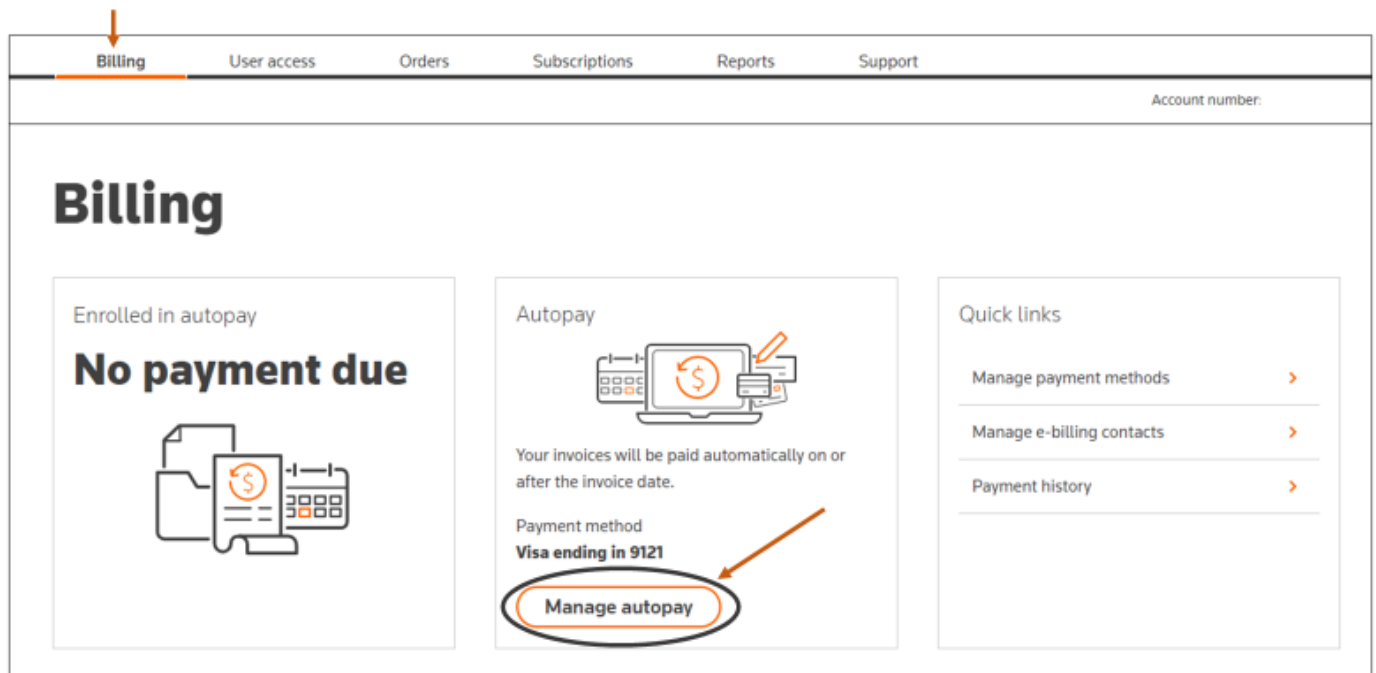
☐ **# LIBRARY MAINTENANCE AGREEMENT SUB** Total: \$0.00

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

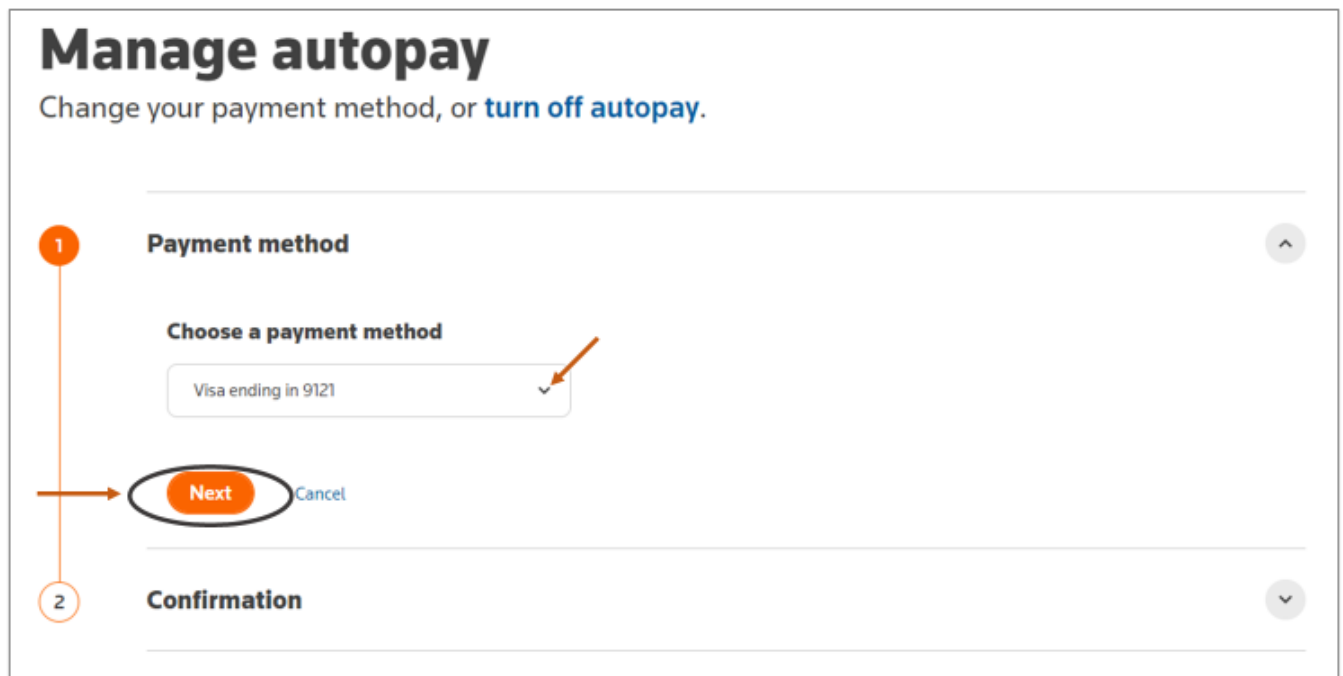
Next, follow the instructions to **Make a Payment** provided in this guide.

Manage Autopay

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

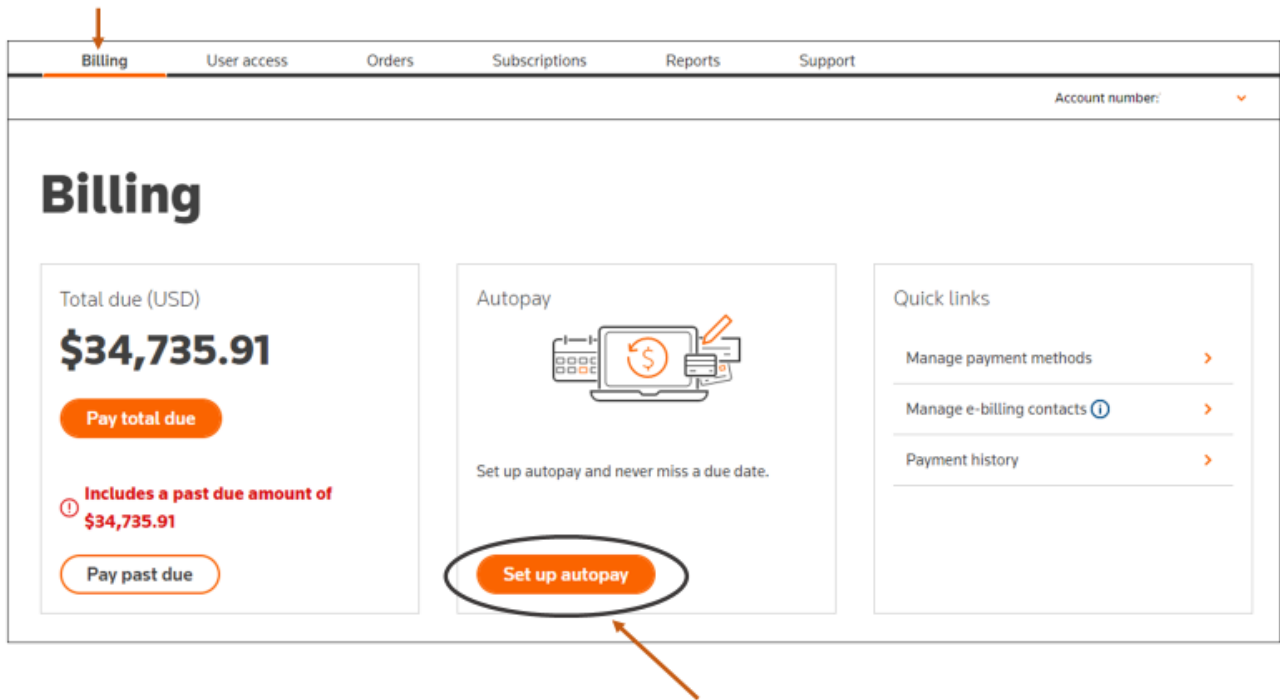


Next, choose a payment method and then click **Next**.

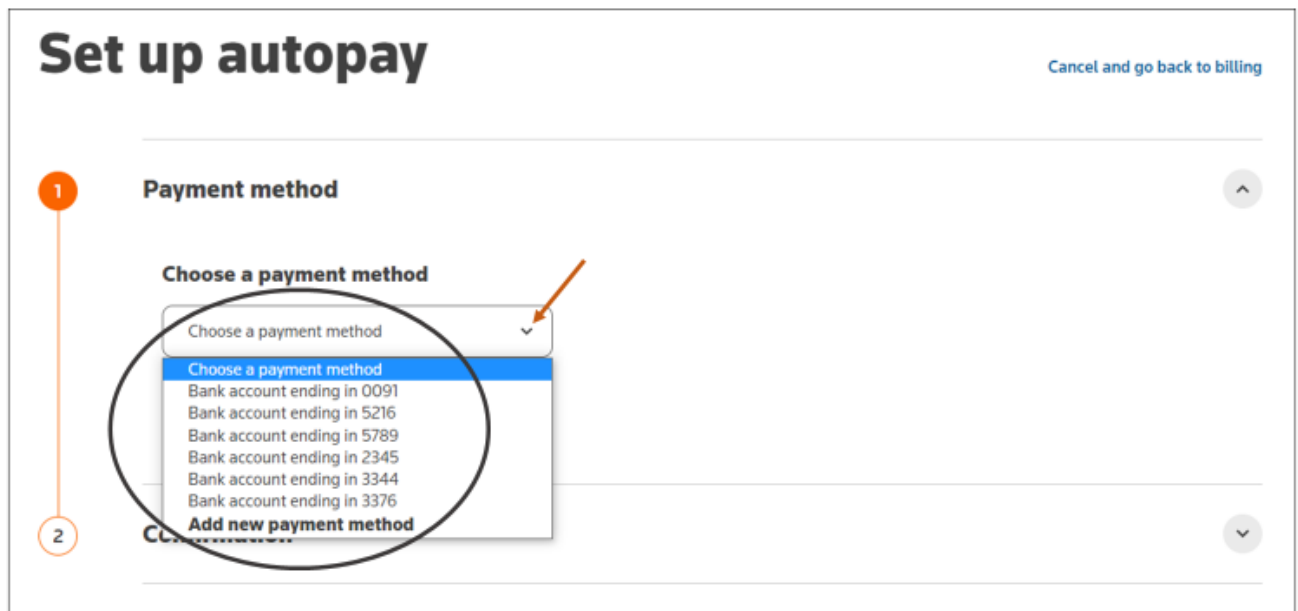


Set up Autopay

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



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



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

The image displays two screenshots of the 'Set up autopay' form, illustrating the steps to add a new payment method.

Left Screenshot (Bank account path):

- Step 1: Payment method**
 - Choose a payment method: 'Add new payment method' dropdown menu.
 - Buttons: **Bank account** (selected) and Credit card.
 - Text: 'All fields required.'
 - Routing number: 'Enter routing number' field.
 - Account number: 'Enter account number' field.
 - Card number field: '123456789 0012345678900' (with routing and account number labels).
 - Buttons: **Next** and Cancel.
- Step 2: Confirmation**

Right Screenshot (Credit card path):

- Step 1: Payment method**
 - Choose a payment method: 'Add new payment method' dropdown menu.
 - Buttons: Bank account and **Credit card** (selected).
 - Text: 'All fields required.'
 - Name on card: 'Name on card' field.
 - Card number: 'Card number' field with logos (MasterCard, VISA, American Express, Discover).
 - Expiration month (MM): 'Months' dropdown.
 - Expiration year (YYYY): 'Year' dropdown.
 - Security code: '3 or 4 digit code on the back or front of card' field.
 - Buttons: **Next** and Cancel.

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

2 Confirmation

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

Bank account ending in **5216**

About Autopay

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

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

Authorization for Autopay

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

Customer Acknowledgement

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

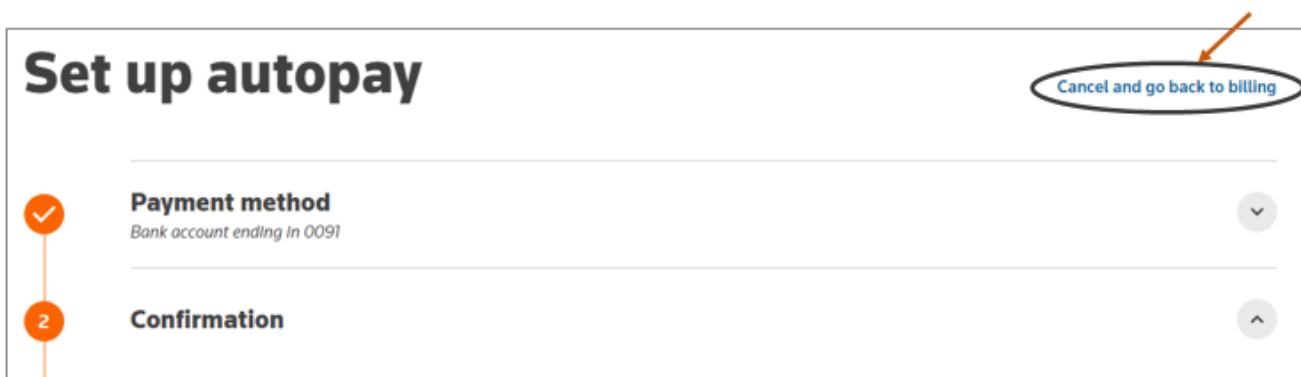
Terminating Autopay

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

☒ I have read and agree to the autopay terms and conditions.

Confirm **Back**

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



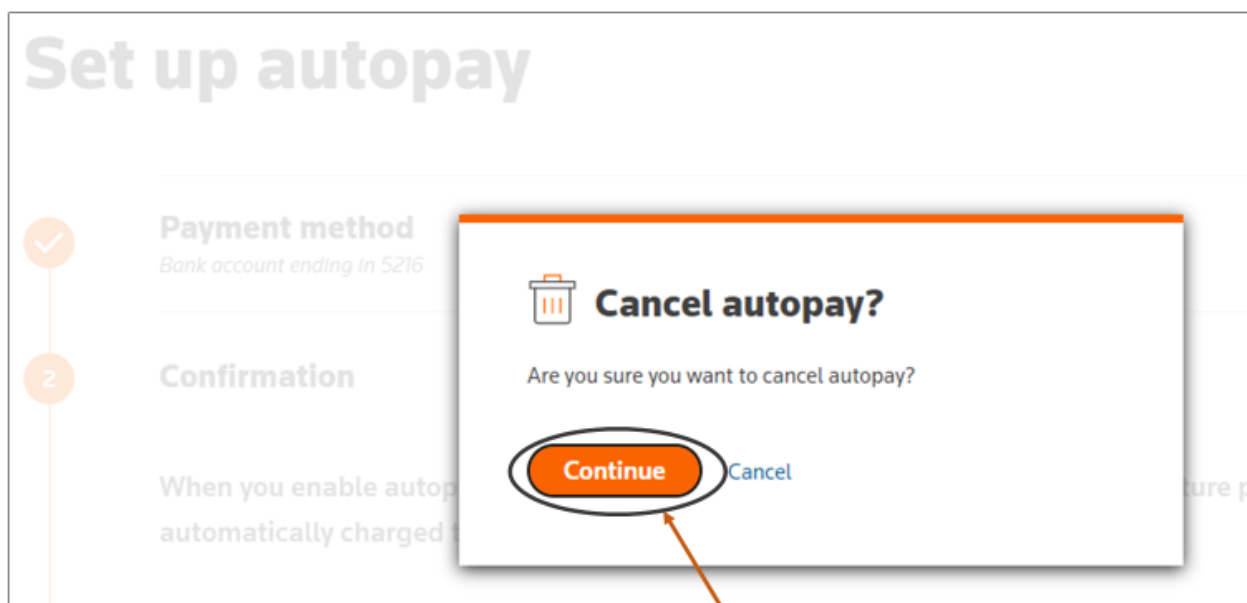
Set up autopay

[Cancel and go back to billing](#)

1 **Payment method**
Bank account ending in 0091

2 **Confirmation**

Next, click **Continue**.



Set up autopay

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

2 **Confirmation**

When you enable autopay, your account will be automatically charged.

Cancel autopay?
Are you sure you want to cancel autopay?

Continue [Cancel](#)

Turn Off Autopay

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

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

1 Payment method

Choose a payment method

Visa ending in 9121

Next Cancel

2 Confirmation

Then, click **Turn off**.

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

1 Payment method

Choose a payment method

Visa ending in 9121

Next Cancel

Turn off autopay?

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

Turn off [Keep autopay on](#)

Dispute an Invoice

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

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

Next, click Report a problem.

[← Back to billing](#)

Invoice 084554

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

Selected amount (USD)

\$154.28

[Pay amount](#)

Details

Total amount: **\$154.28**

Due by: **Dec 11, 2021**

Invoice issued: **Dec 01, 2021**

[Report a problem](#)

Account name:

Account number:

610 OPPERMAN DR,
EAGAN, VT, USA,
32103

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

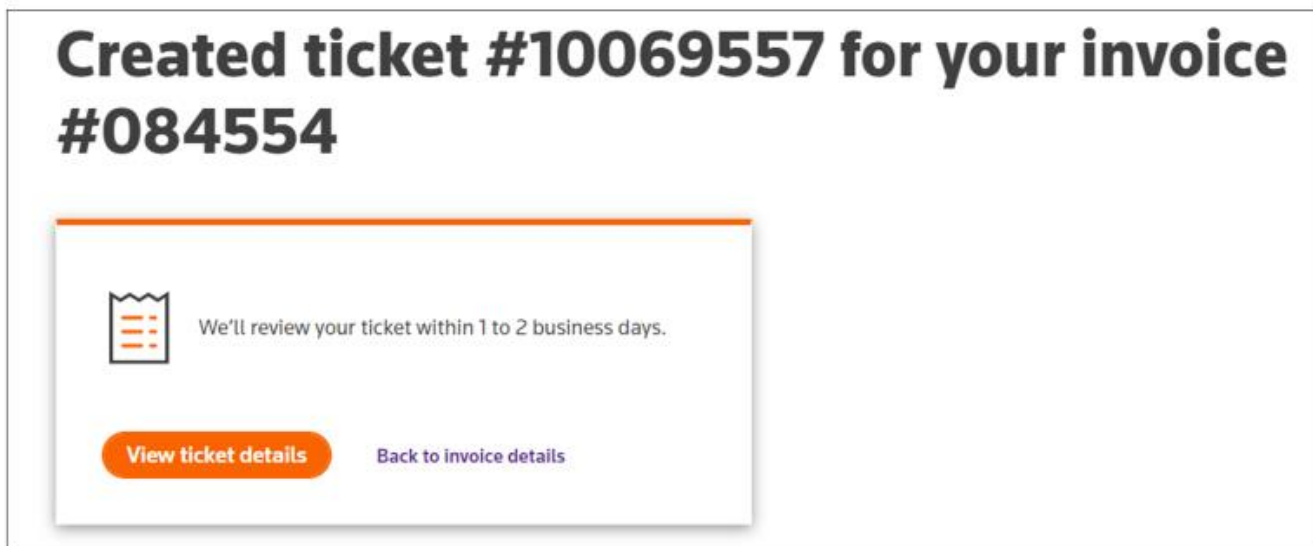
Complete the relevant information in the form. Note the following: 1) a phone number is required and must include the country code (i.e., +1 for US), and just numbers, 2) your email address is prepopulated and cannot be changed here, and 3) for **Type of problem**, click the carrot and select the most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

The screenshot shows a web form titled "Problem on invoice 084554". At the top left is a link "← Back to billing". Below the title is a prompt: "Briefly describe the problem, and attach any relevant files. We'll create a support ticket from the info that you provide here." The form contains several fields: "Phone number" with a note "We'll only use this to contact you about the problem that you're reporting." and a text input; "Email" with a pre-filled text input; a checkbox for "Receive email notifications when an agent comments on your ticket. (Optional)"; "Type of problem" with a dropdown menu; and a "Description" text area with the instruction "Share the details of the problem so that we can assign your ticket to the right service representative." To the right of the description is a file upload section titled "Attach files to your message (Optional)" with a "Drop files to upload" area and a "Choose files" button. At the bottom left is an orange "Submit" button. An orange arrow points from the "Type of problem" dropdown to a detailed list of options: "Select one", "I already paid this", "I have already cancelled this", "I did not want to renew", "The price is incorrect", "I need an update to my invoice", and "Other". Another orange arrow points from the "Submit" button to the "Type of problem" dropdown. A third orange arrow points from the "Submit" button to the "Description" text area.

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

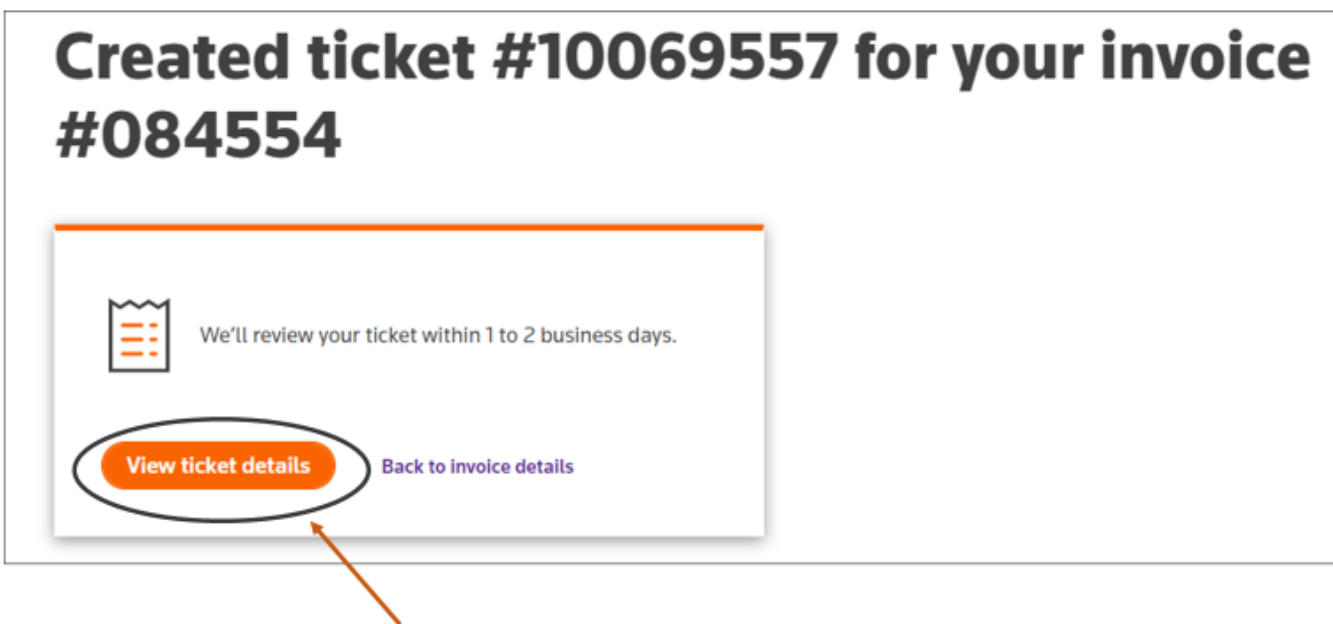
The screenshot shows a popup window titled "Update phone number?". It contains the text: "The current phone number in your profile is:" followed by "Do you want to update your phone number to:" and "+1". At the bottom are two buttons: "Update" (orange) and "Don't update" (blue). An orange arrow points from the "Update" button to the "Don't update" button.

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



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

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



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

Support

Account number:

Submit tickets to get help faster

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

[Submit a ticket](#)

Open tickets **Resolved tickets**

Open ticket details

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

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

[← Back to all tickets](#)



Problem on invoice 084554

Created on Jun 3, 2022 • 3:54 pm

Ticket details



Status

Work in progress

Case number

10069267

Last updated

Jun 3, 2022 • 4:56 pm

Category

Billing, payments, refunds, and returns

Reason for submitting ticket

I need help with an invoice.

Ticket description

This is just a test - no need to contact.

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

Attachments (0)



Send more details

Send a message to your customer service representative.

Ticket description (Optional)

How can we help?

Attach files to your message (Optional)

Drop files to upload



[Choose files](#)

7 MB limit per upload

Send



Conversation history

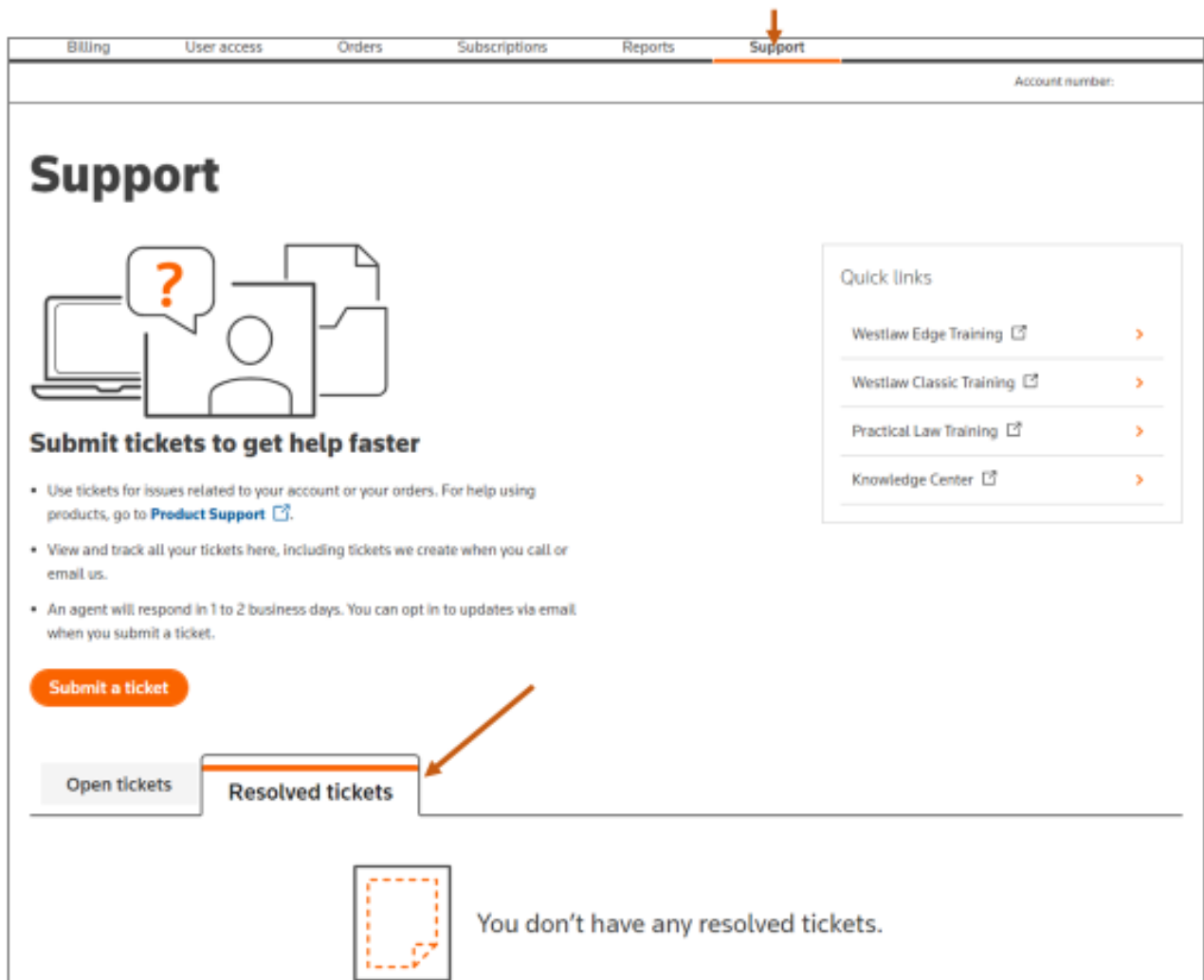


Leslie, customer service representative

Jun 3, 2022 • 4:54 pm

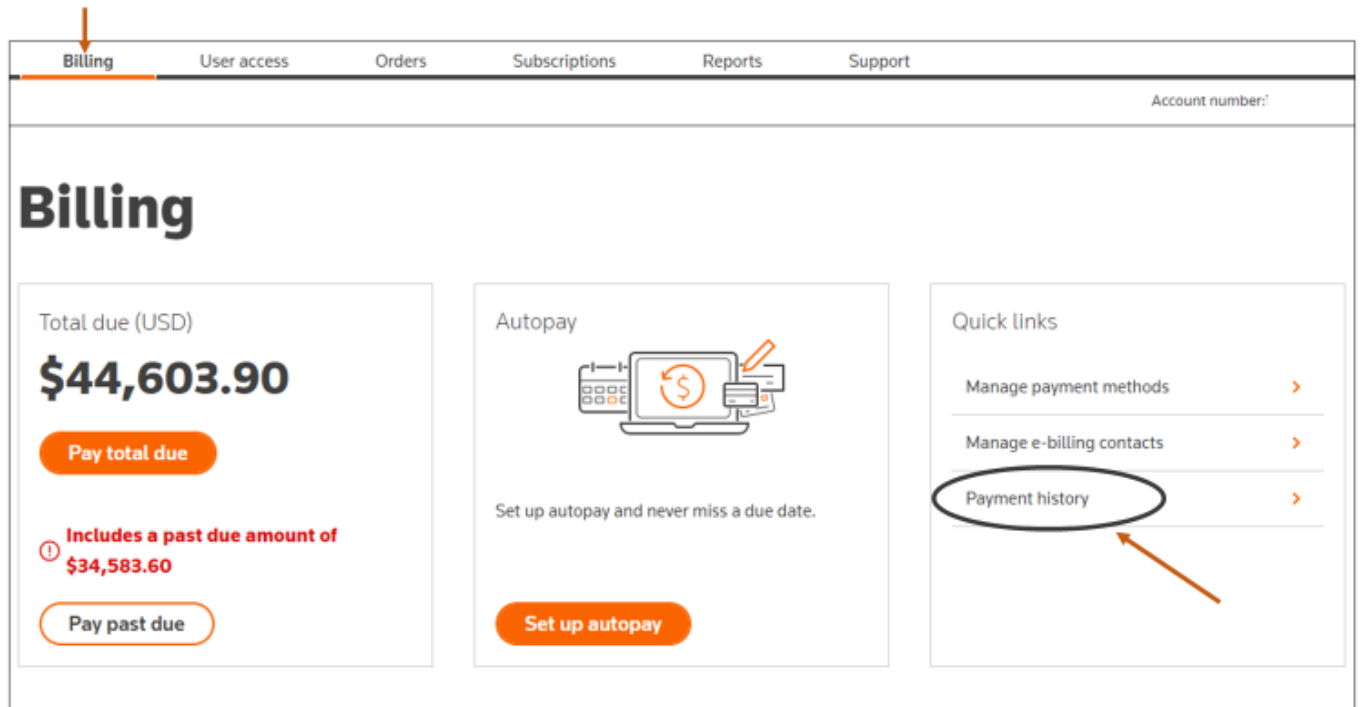
This is test case, no further action needed.

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



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

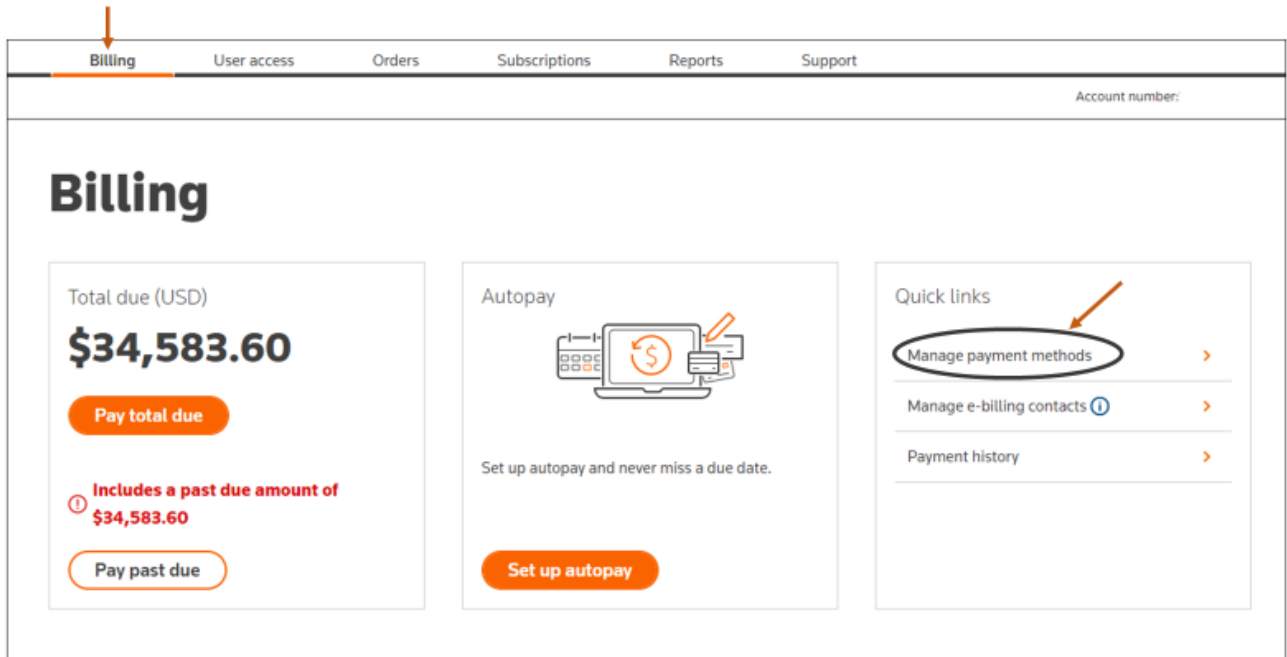
Payments made in the last 13 months are displayed below.

Payment history for 10043 [Export payment history to file](#) 

Payment date	Invoice number	Payment method	Amount (USD)
May 20, 2022	0844876642	Bank account XXXXXX0137	\$154.28
Apr 11, 2022	0844389694	Visa ending in 5861	\$5.78 *Partial payment
Mar 28, 2022	0845728929	Bank account XXXXXX0137	\$154.28
Mar 27, 2022	0844389694	Visa ending in 8432	\$32.12 *Partial payment
Dec 07, 2021	AUTO WRITE-OFF	CREDIT	\$0.01 *Partial payment
Oct 07, 2021	0844389694	Visa ending in 3298	\$13.06 *Partial payment
Oct 07, 2021	0845043024	Visa ending in 3298	\$13.05 *Partial payment
Sep 12, 2021	0844389694	Visa ending in 8432	\$5.78 *Partial payment
Sep 12, 2021	0844716448	Visa ending in 8432	\$13.05 *Partial payment

Manage Payment Methods

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



Add a Payment Method

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

← Back to billing

Manage payment methods

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

Add payment method

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

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

Manage payment methods

Add your payment method

Bank account ✓ **Credit card**

Bank account form fields:

- Routing number:** Enter routing number (123456789)
- Account number:** Enter account number (0012345678900)
- Buttons:** Add, Cancel

Credit card form fields:

- Card type:** Bank account, **Credit card** ✓
- Name on card:** [Text field]
- Card number:** [Text field with Visa, Mastercard, American Express logos]
- Expiration month (MM):** [Dropdown menu]
- Expiration year (YYYY):** [Dropdown menu]
- Security code:** 3 or 4 digit code on the back or front of card [Text field]
- Buttons:** Add, Cancel

Save a Payment Method

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

Make a payment

[Cancel and go back to billing](#)

1

Payment method

Add new payment method

Bank account ✓

Credit card

All fields required.

Routing number

Account number

Enter routing number

Enter account number

Routing number

Account number

123456789

0012345678900

☐ Save payment method

Next

Cancel

2

Confirmation

Make a payment

1

Payment method

Add new payment method

Bank account

Credit card ✓

All fields required.

Name on card

Card number

Expiration month (MM)

Expiration year (YYYY)

Security code

1234567890123456

7890123456789012

Month

Year

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

1234

5678

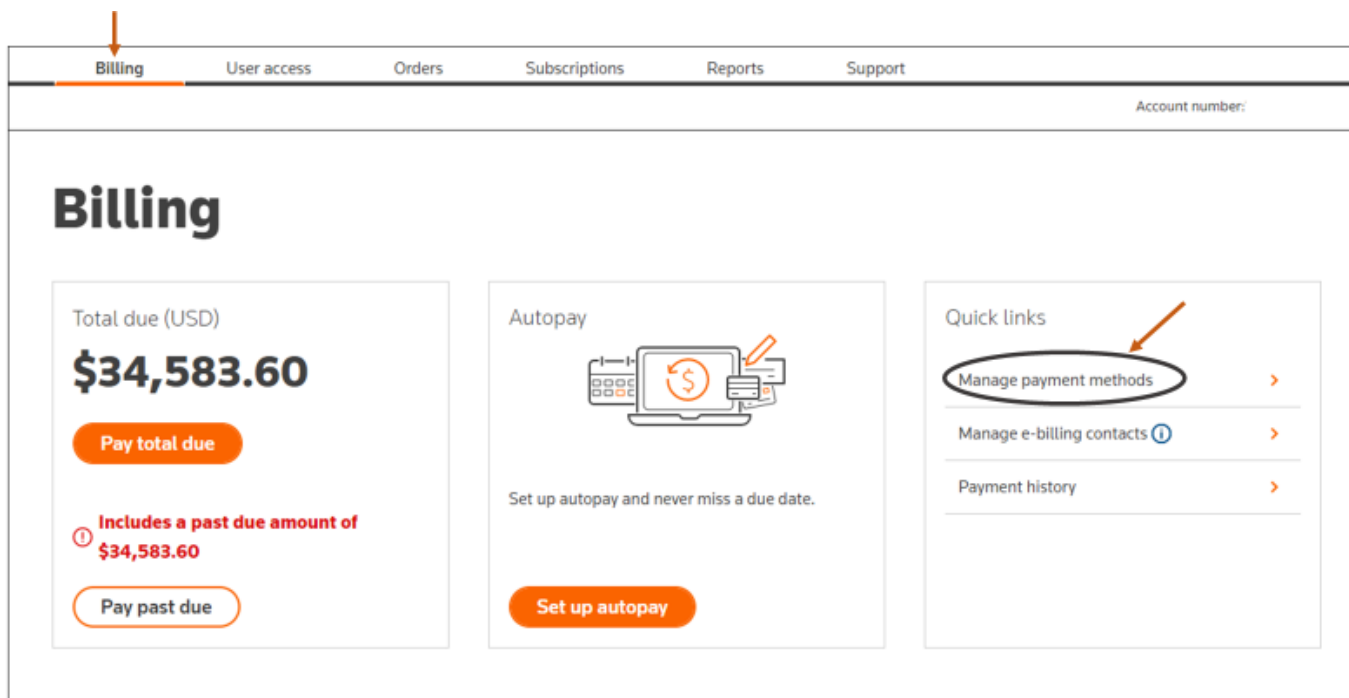
☐ Save payment method

Next

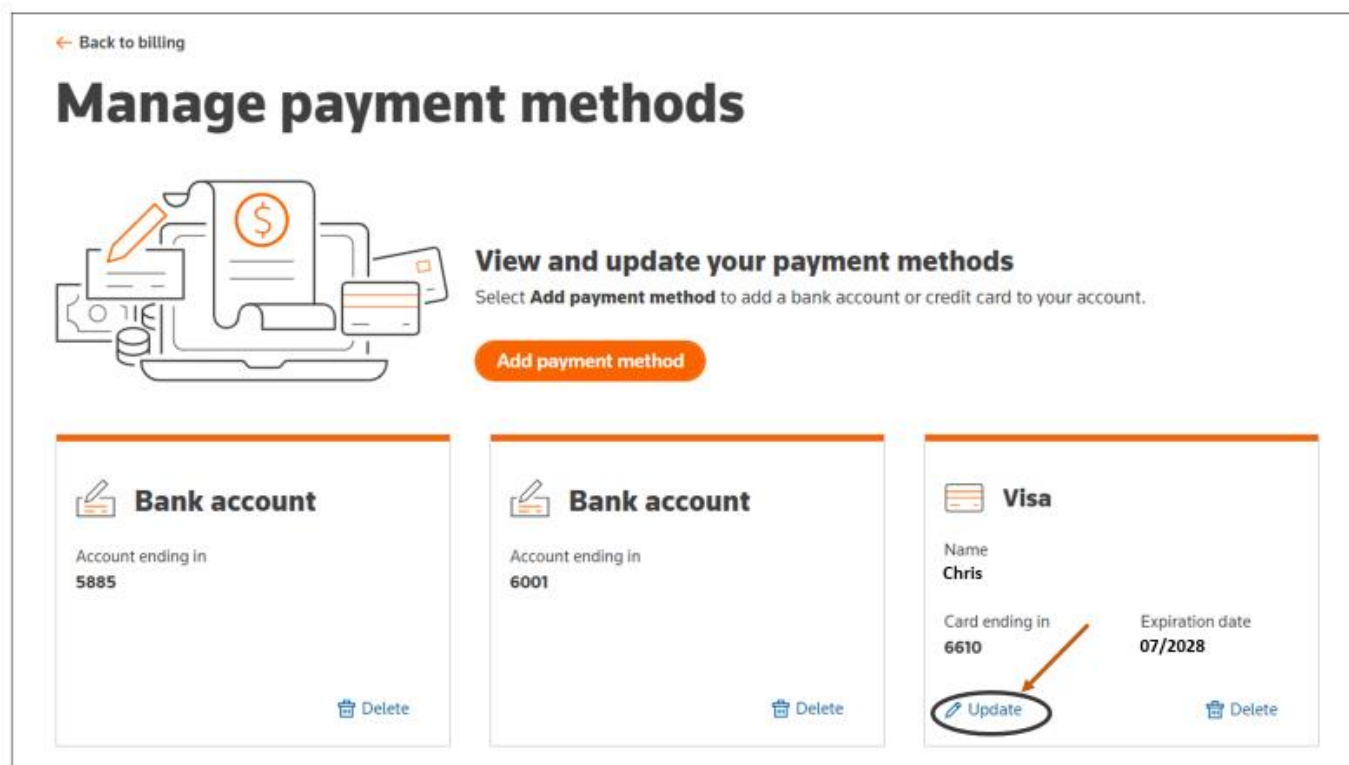
Cancel

Edit a Payment Method

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




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







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



Update your credit card



Name on card

Card number
    

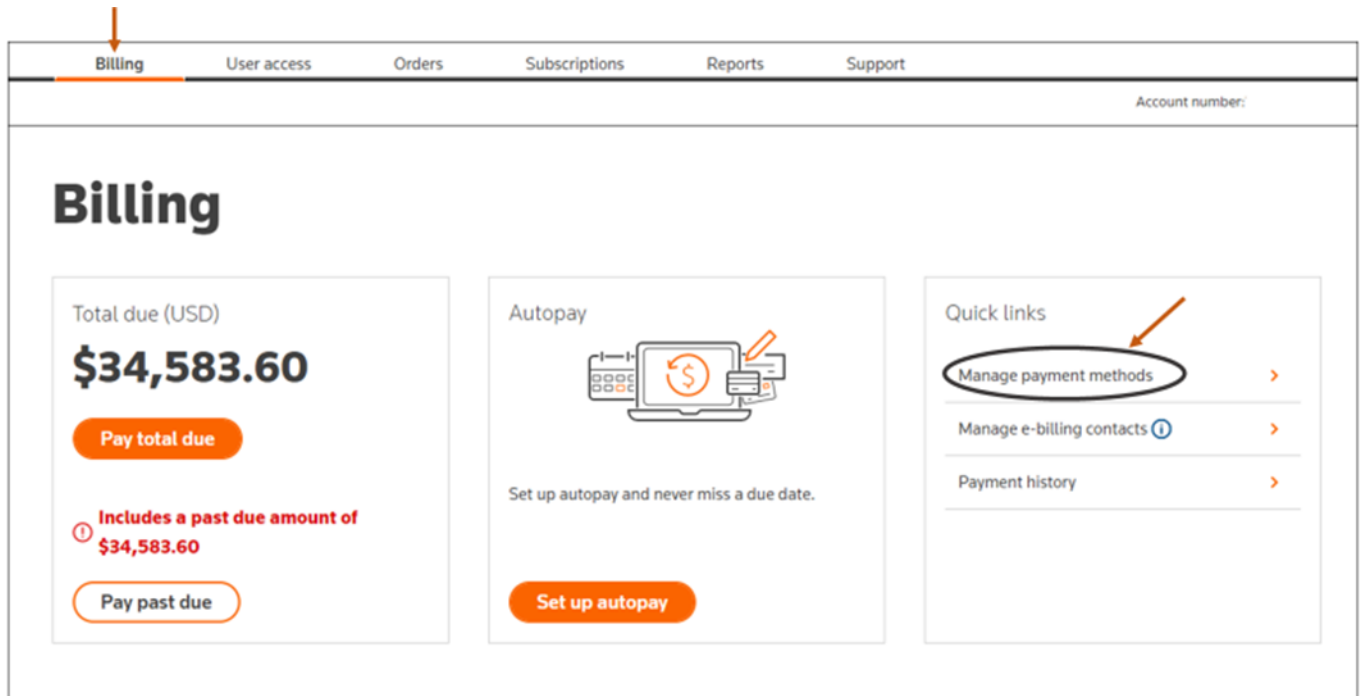
Expiration month (MM) Expiration year (YYYY)

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

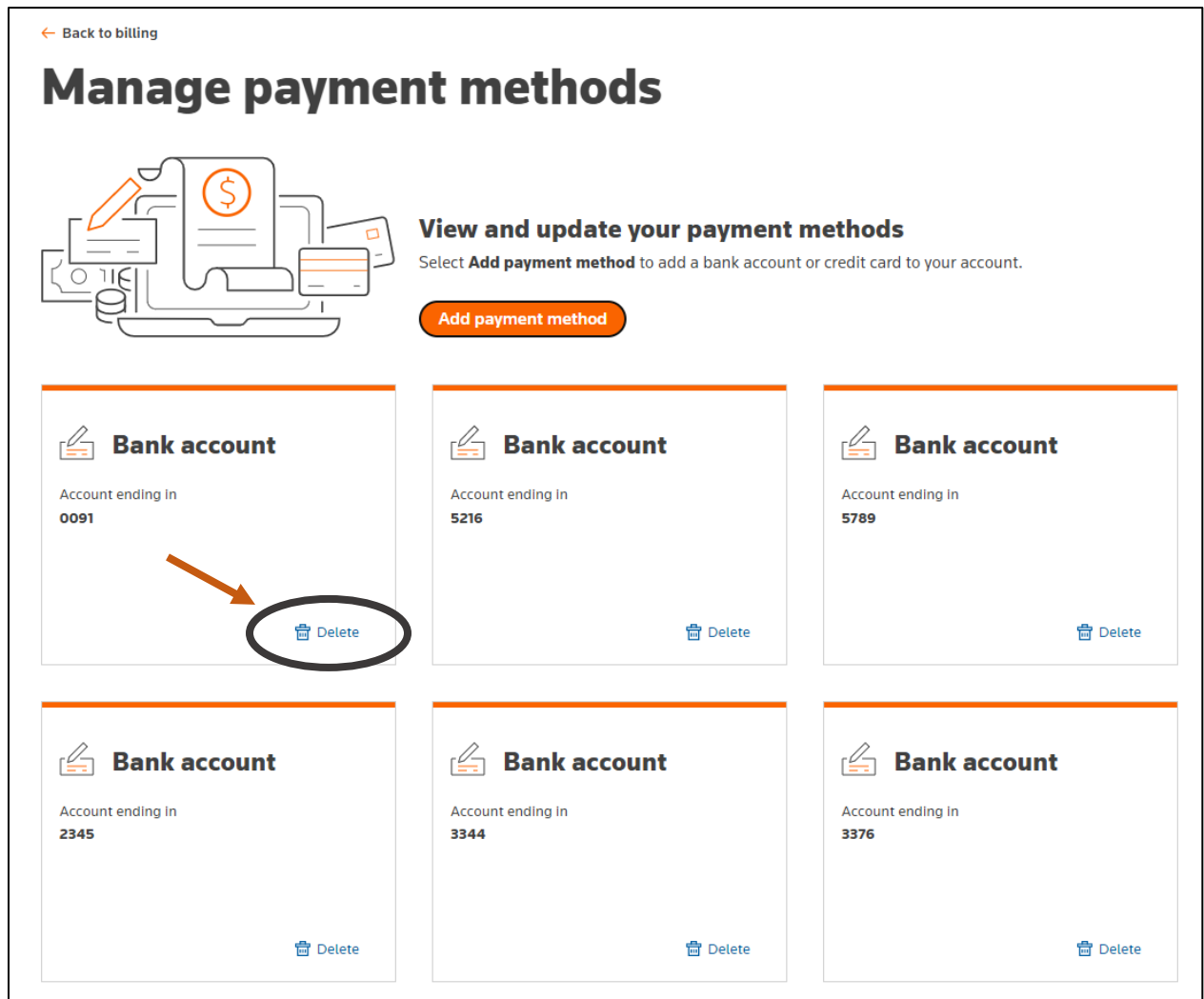
Update [Cancel](#)

Delete a Payment Method

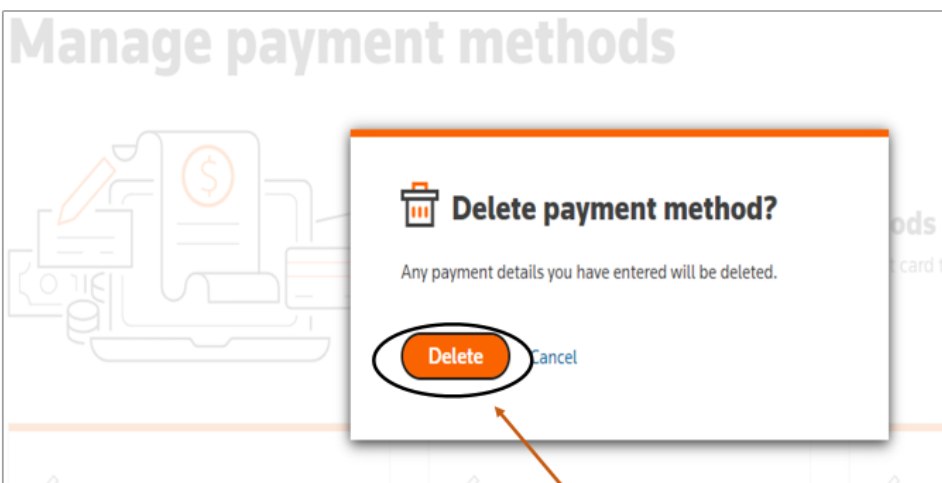
Navigate to the **Billing tab** and click **Manage payment methods** from the Quick links box on the right side.



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

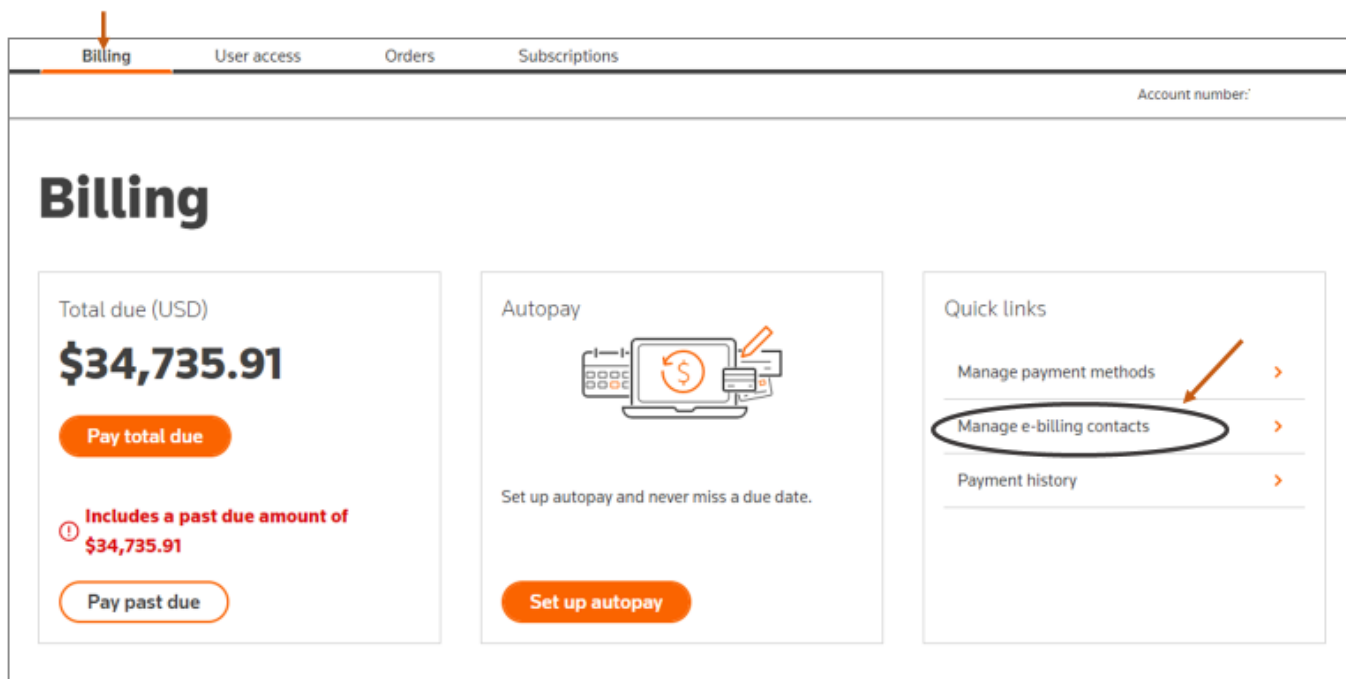


Then, click **Delete** in the popup window.



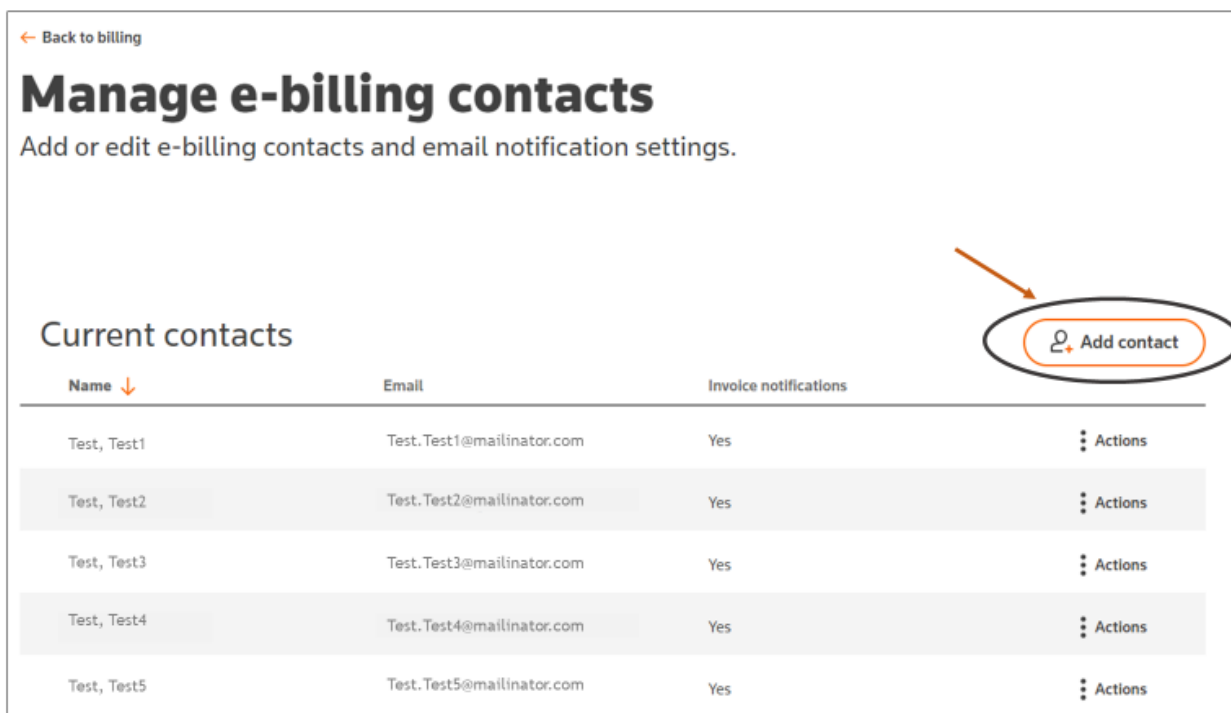
Manage e-Billing Contacts

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



Add an e-Billing Contact

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



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

← Back to manage e-billing contacts

Add contacts

Enter contact information

👤 Contact 1:

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

+ Add another contact

Add contacts Cancel

An orange arrow points to the **Add contacts** button.

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

← Back to manage e-billing contacts

Add contacts

Enter contact information

👤 Contact 1:

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

+ Add another contact

Add contacts Cancel

An orange arrow points to the **Add another contact** button.

← Back to manage e-billing contacts

Add contacts

Enter contact information

👤 Contact 1:

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

⚠ Enter a first name.

👤 Contact 2:

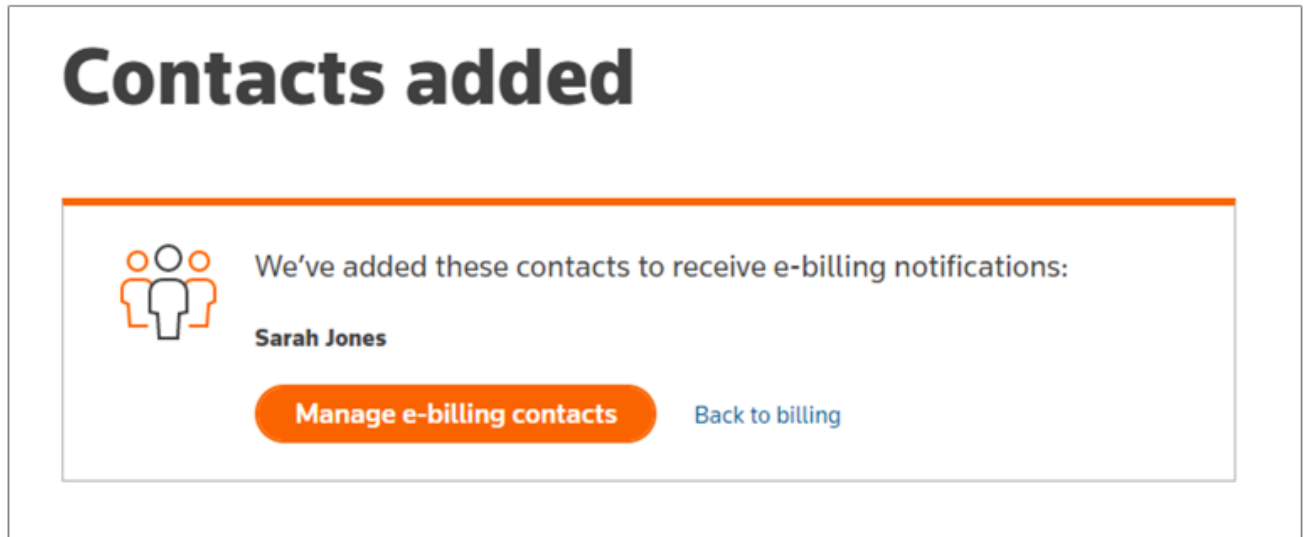
First name	Last name	Email
<input type="text" value="Enter first name"/>	<input type="text" value="Enter last name"/>	<input type="text" value="Enter email"/>

+ Add another contact

Add contacts Cancel

An orange arrow points to the **Add contacts** button.

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**.

← Back to billing

Manage e-billing contacts

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

[Add contact](#)

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

Edit

Delete

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

← Back to manage e-billing contacts

Edit e-billing communications

Edit contact info

First name

Last name

Email

Save [Cancel](#)

Delete an e-Billing Contact

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

← Back to billing

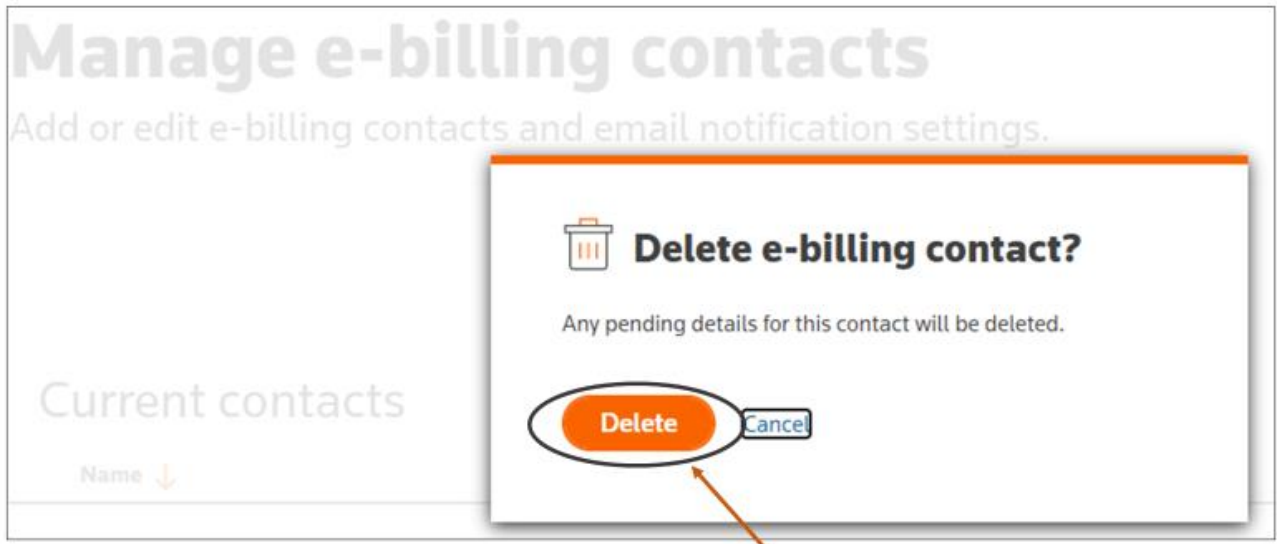
Manage e-billing contacts

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

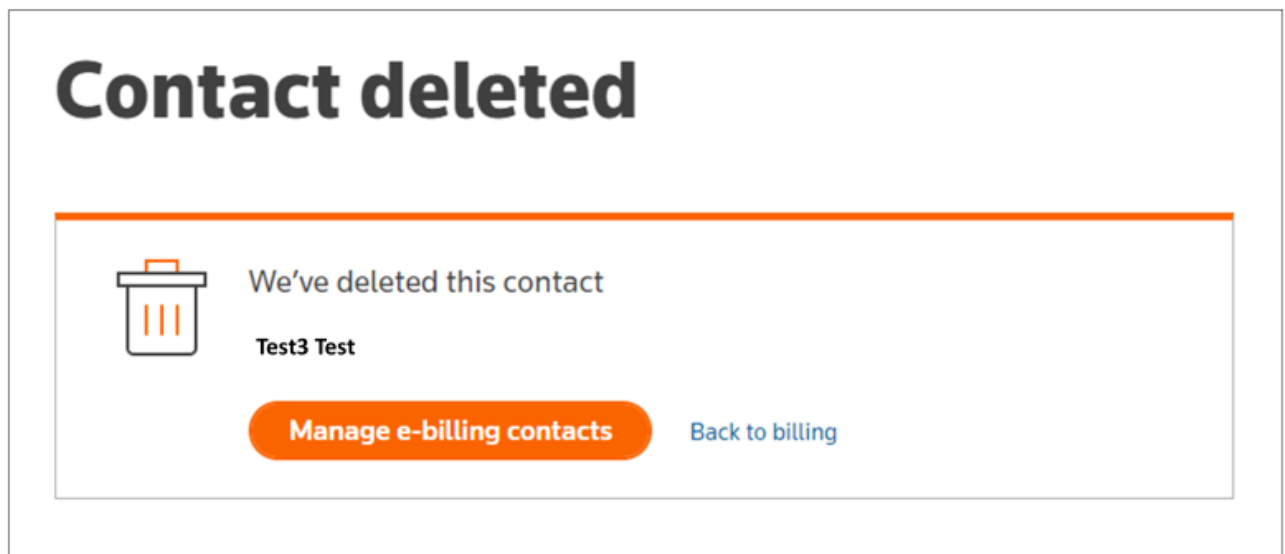
Current contacts ⚙️ Add contact

Name ↓	Email	Invoice notifications	
Test, Test1	Test.Test1@mailinator.com	Yes	⋮ Actions
Test, Test2	Test.Test2@mailinator.com	Yes	⋮ Actions
Test, Test3	Test.Test3@mailinator.com	Yes	<div>Edit</div> <div>Delete</div> ⋮ Actions
Test, Test4	Test.Test4@mailinator.com	Yes	⋮ Actions
Test, Test5	Test.Test5@mailinator.com	Yes	⋮ Actions

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



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



USER MANAGEMENT TASKS

View Users

View Product Users

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

User access

Account number:

Users Admins

Export list to file Invite users

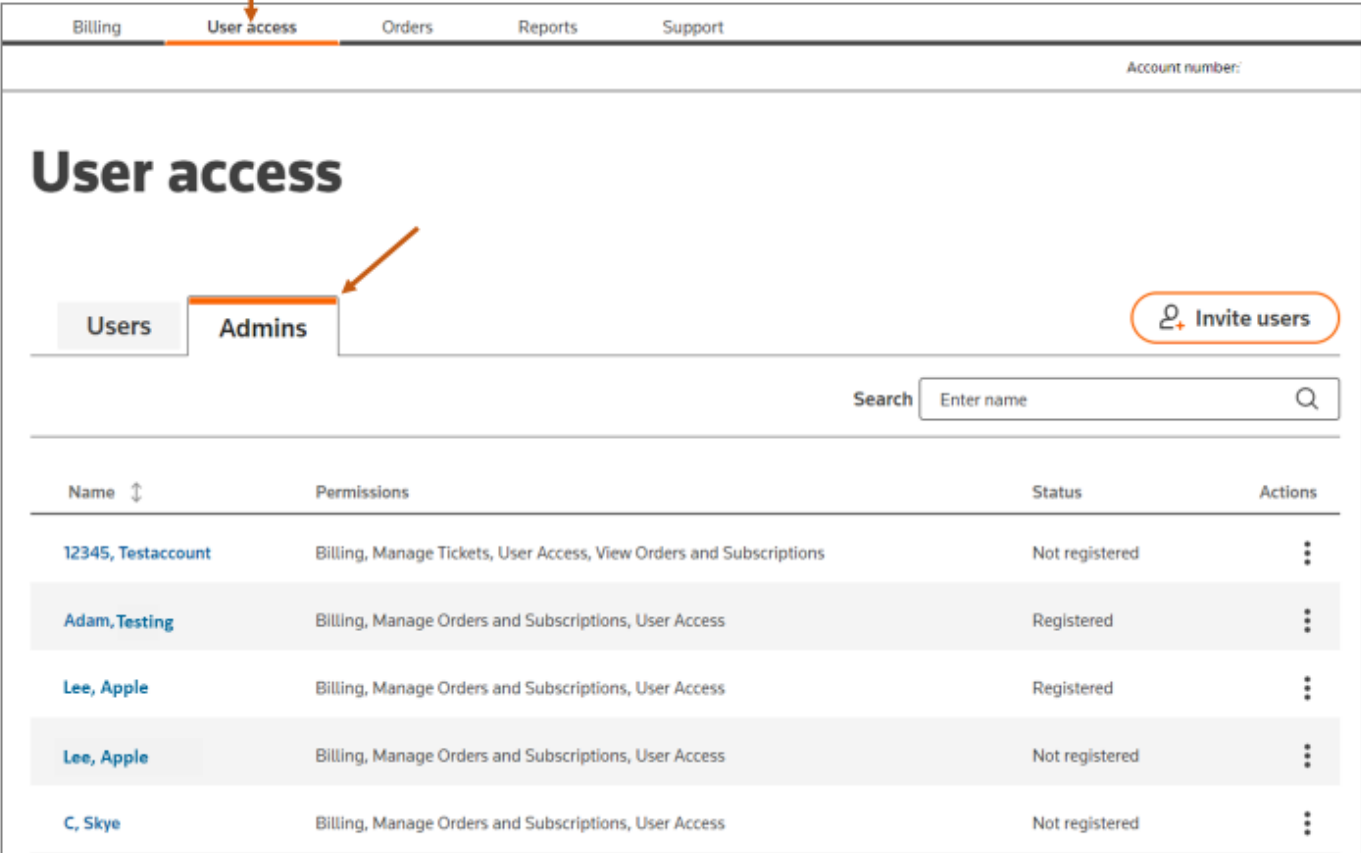
Select | Actions Filter Search

Users by account with product access

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

View Admin Users

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

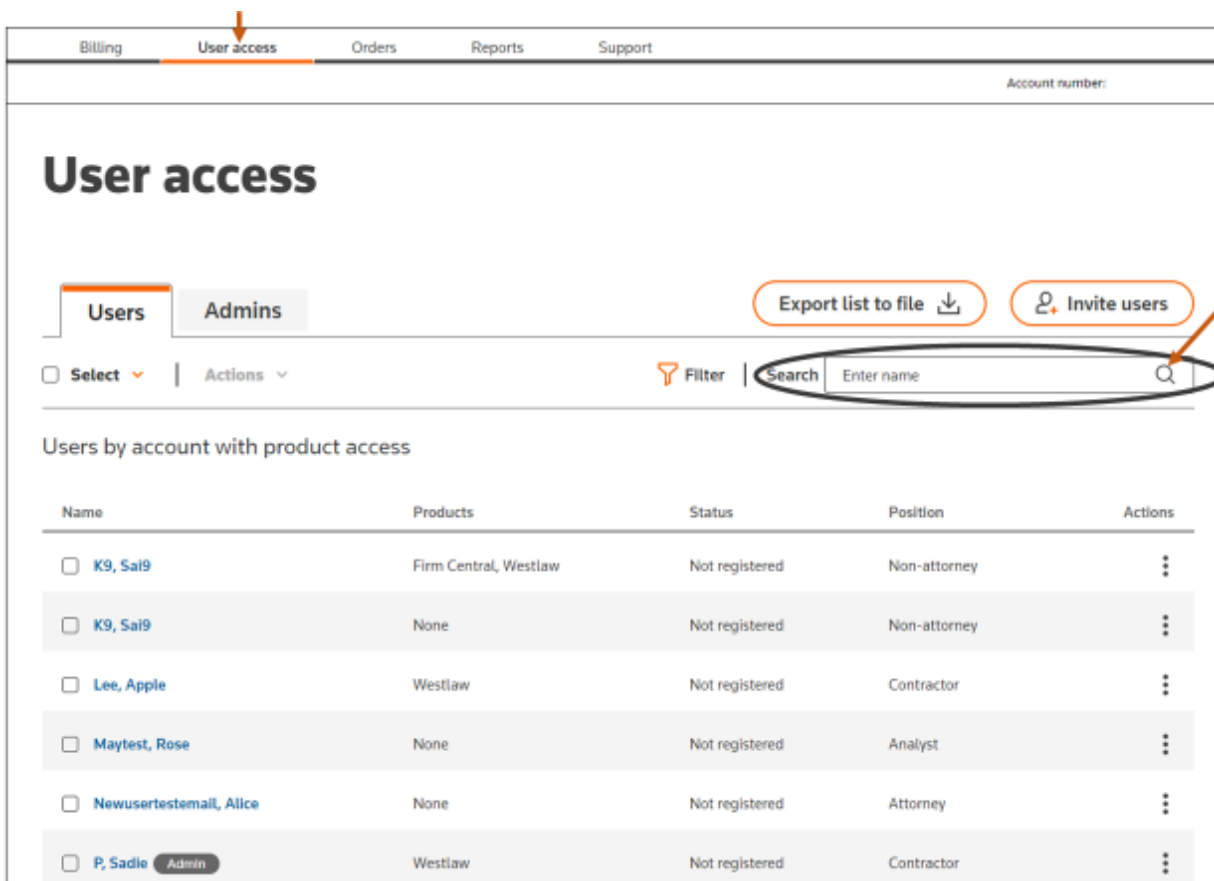


The screenshot shows the 'User access' section of the portal. The top navigation bar has tabs for 'Billing', 'User access', 'Orders', 'Reports', and 'Support'. The 'User access' tab is selected. Below this, there are sub-tabs for 'Users' and 'Admins'. The 'Admins' sub-tab is selected. To the right of the sub-tabs is a button labeled 'Invite users'. Below the sub-tabs is a search bar with the placeholder text 'Enter name'. Below the search bar is a table with the following data:

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

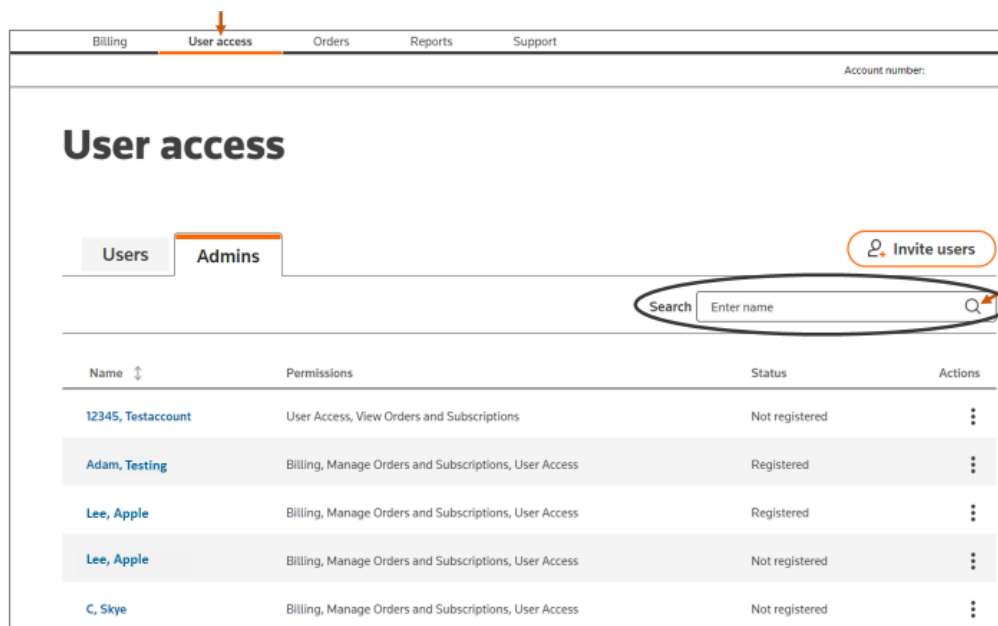
Search for Product or Admin Users

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



The screenshot shows the 'User access' page with the 'Users' tab selected. The 'Search' bar is highlighted with a red circle and an arrow pointing to it. The table below shows a list of users with columns for Name, Products, Status, Position, and Actions.

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

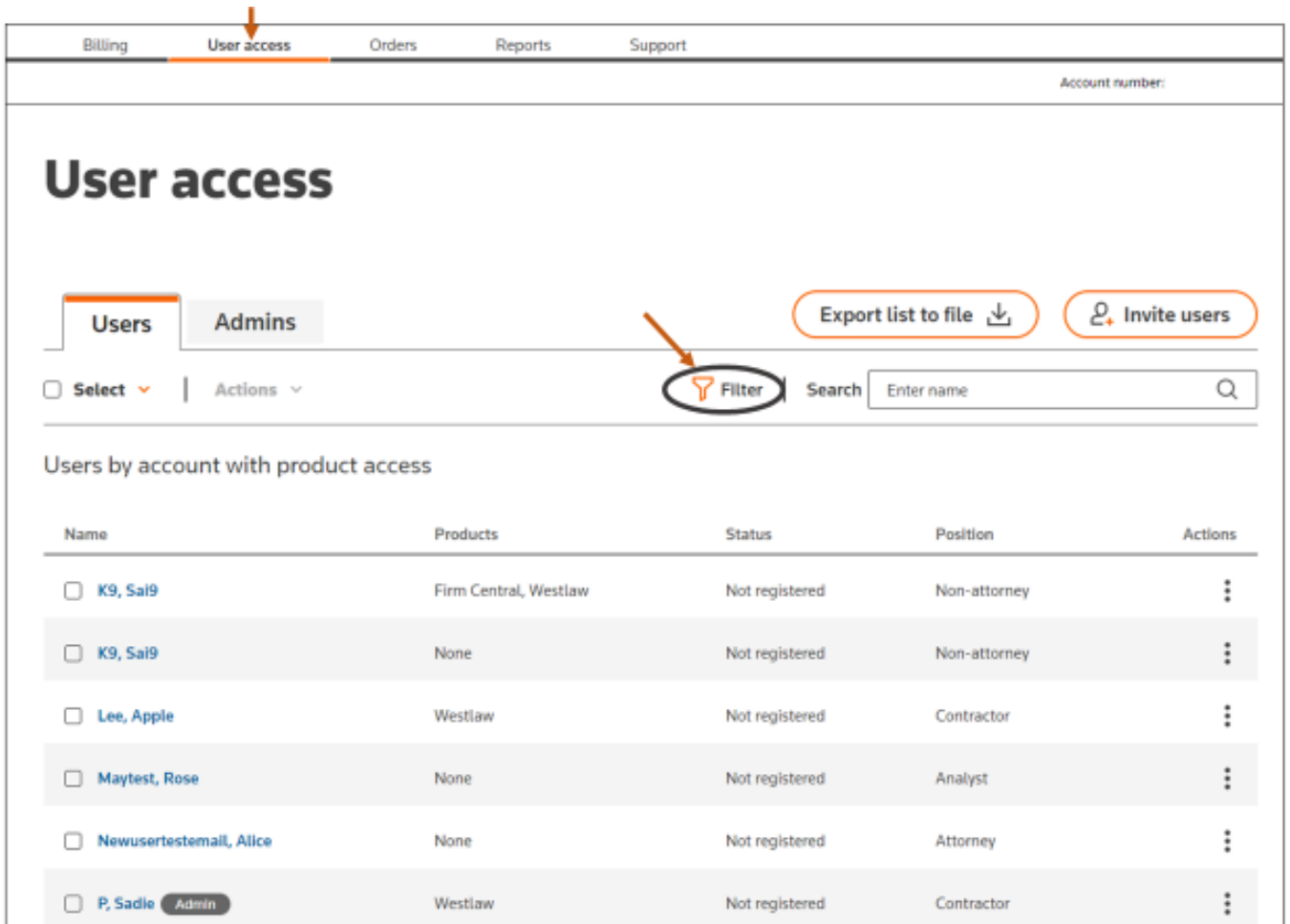


The screenshot shows the 'User access' page with the 'Admins' tab selected. The 'Search' bar is highlighted with a red circle and an arrow pointing to it. The table below shows a list of admins with columns for Name, Permissions, Status, and Actions.

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


Filter Users



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





User access







Users Admins

Export list to file  Invite users

Select  Actions 

 Filter Search Enter name 

Users by account with product access

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

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

Filters Close X

Position ▲

- ☐ Administrator
- ☐ Analyst
- ☐ Attorney
- ☐ Clerk
- ☐ Contractor
- ☐ Investigator
- ☐ Judge
- ☐ Librarian
- ☐ Manager
- ☐ Non-attorney
- ☐ Paralegal
- ☐ Solutions Administrator
- ☐ Supervisor
- ☐ Technical

Status ▲

- ☒ All
- ☐ Registered
- ☐ Partially registered
- ☐ Not registered

Apply filters Clear filters

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

Account number:

User access

Users Admins

Export list to file

Invite users

☐ Select | Actions

Filter(2) | Search

Users by account with product access

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

Export List of Users to File

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

The screenshot shows the 'User access' section of the portal. The top navigation bar includes 'Billing', 'User access' (selected), 'Orders', 'Reports', and 'Support'. Below this, the 'User access' title is displayed. Underneath, there are two sub-tabs: 'Users' (selected) and 'Admins'. To the right of these tabs are two buttons: 'Export list to file' (circled with an orange arrow) and 'Invite users'. Below the buttons is a search bar with the placeholder text 'Enter name' and a search icon. Below the search bar is a table titled 'Users by account with product access'. The table has five columns: Name, Products, Status, Position, and Actions. The table contains seven rows of user data.

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

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

User access

Users Admins

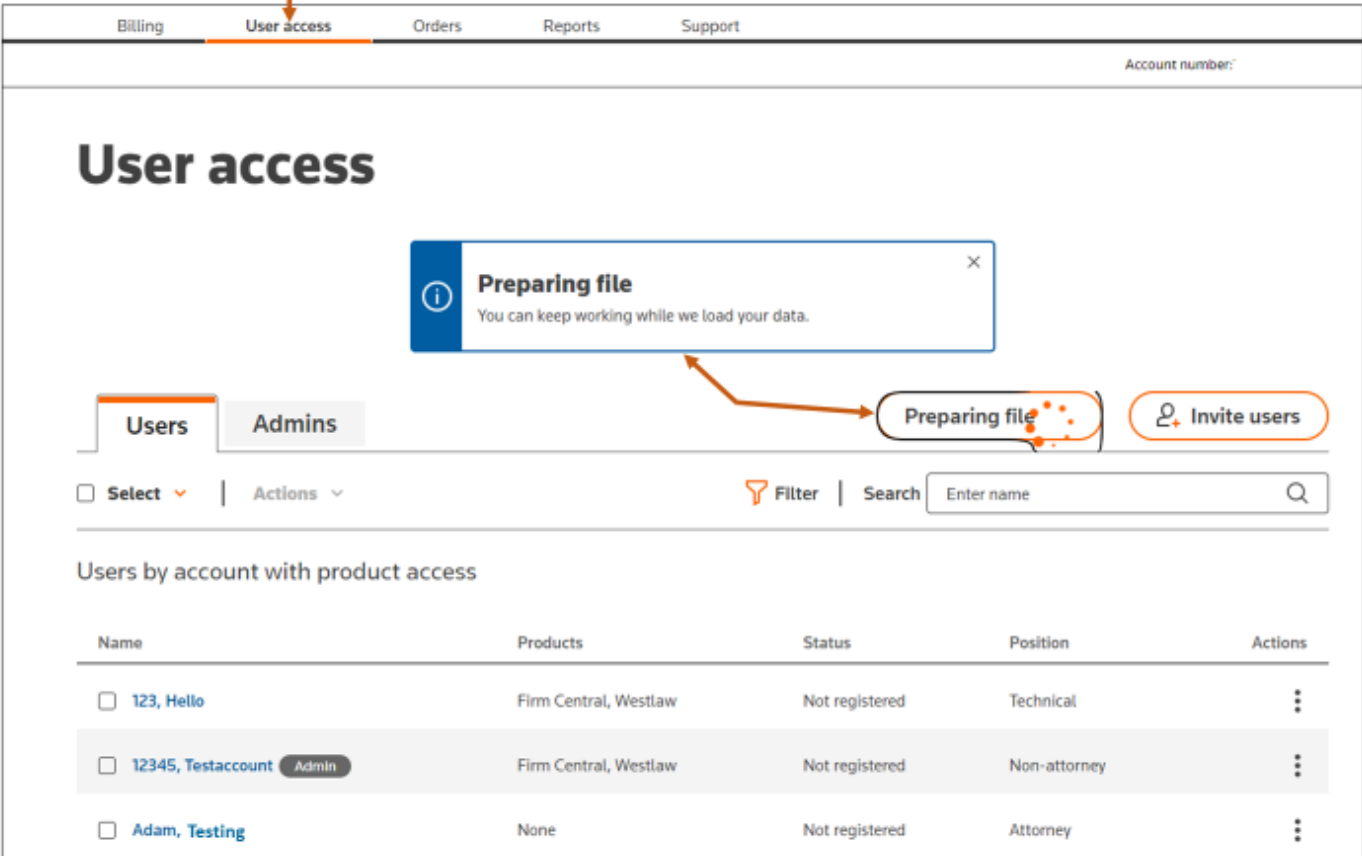
Export list to file

Filter(2) Search Enter name

Users by account with product access

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

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



User access

Preparing file
You can keep working while we load your data.

Users Admins

Select Actions Filter Search Enter name

Users by account with product access

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

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

User access

Account number:

File exported
Check your download folder.

Users Admins

File exported ✓ Invite users

Select Actions Filter Search Enter name

Users by account with product access

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

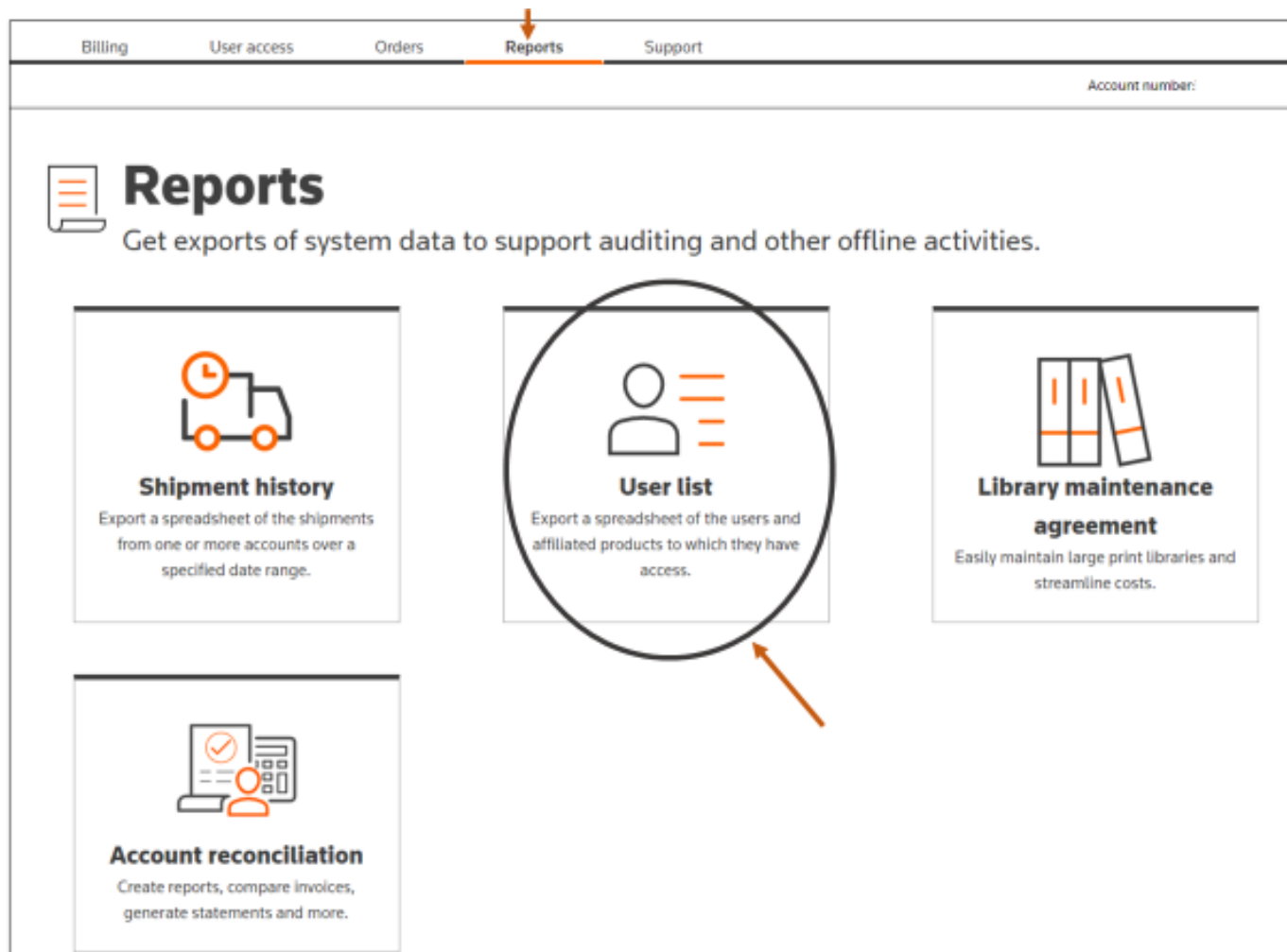
The downloaded Excel file will look similar to the below. Note that you may need to adjust the column widths to properly view the data.

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
Axa, Axa	Firm Central	Not registered	Analyst
Turner, Peter	Westlaw	Not registered	Attorney
C, Skye	Firm Central	Not registered	Attorney

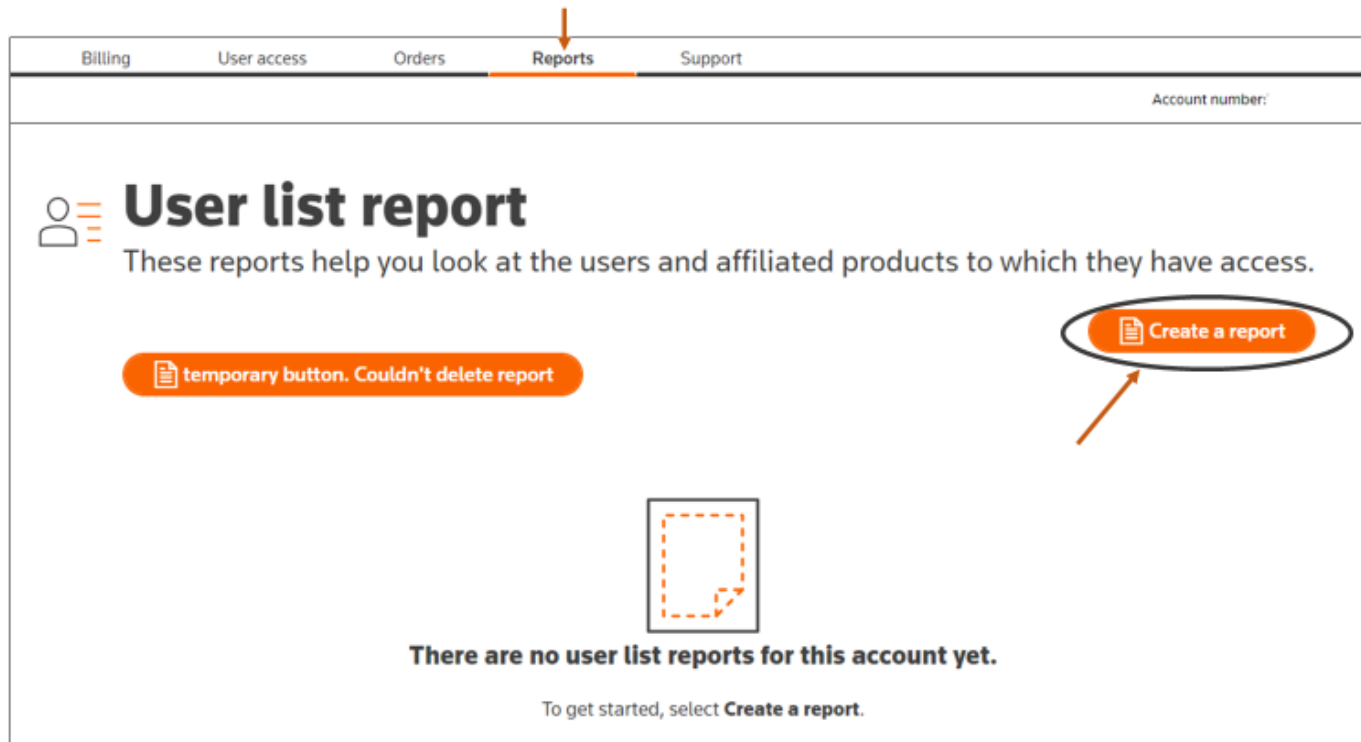
Get a Report of Users

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

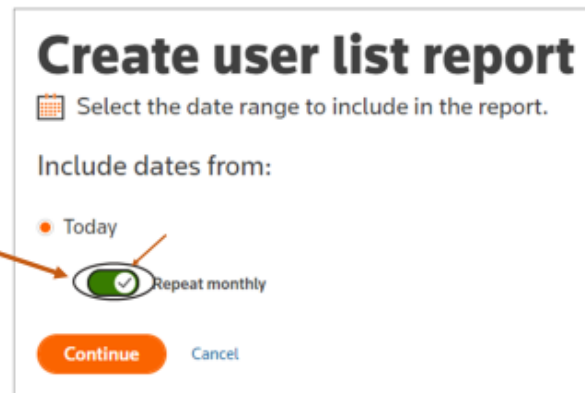
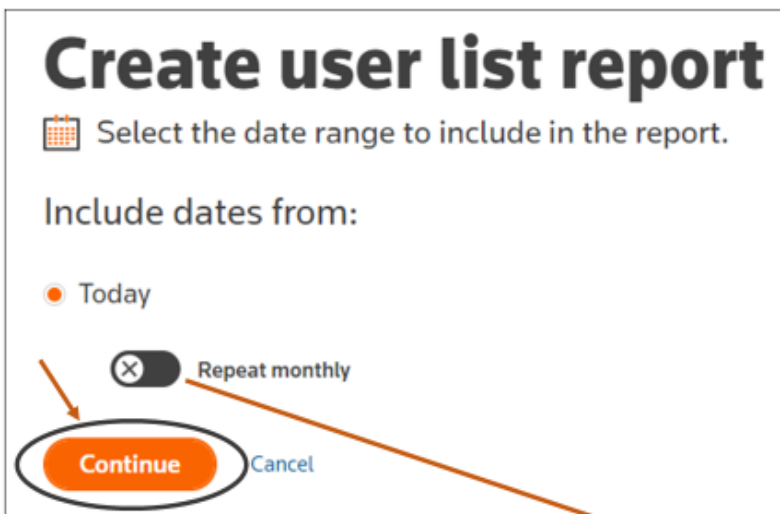
Navigate to the **Reports** tab and click **User list**.



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**.

Create user list report

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

Available accounts list

1 of 1 selected

Search Account, name, address

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

Viewing 1 – 1

Rows per page 10

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

Review your user list report

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

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

Date range Edit
Today
(Jun 15, 2022)

Selected accounts Edit
100
**TEST FOR
TESTING ONLY


Recurring Edit
No





Save and run report



Cancel

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

Review your user list report


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

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


 

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

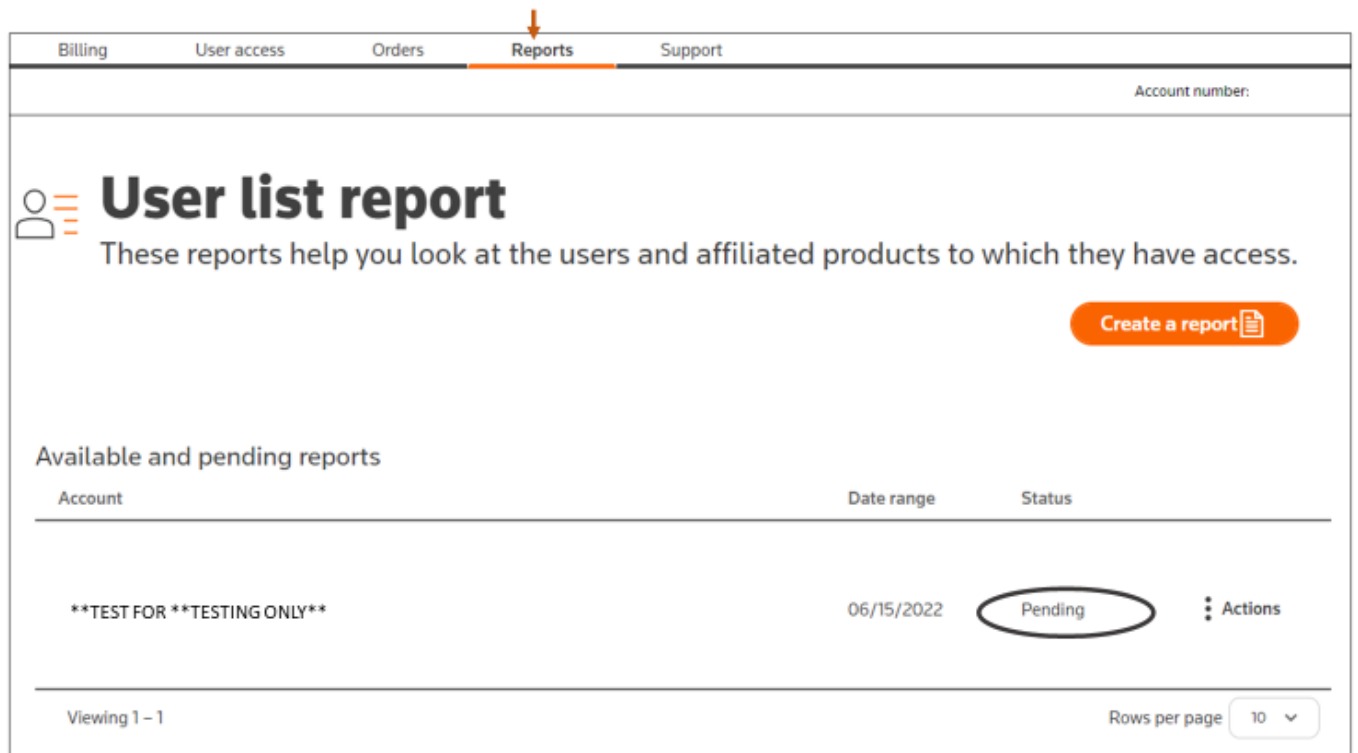
We're running your report



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



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



Billing User access Orders **Reports** Support

Account number:

User list report

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

Create a report

Available and pending reports

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

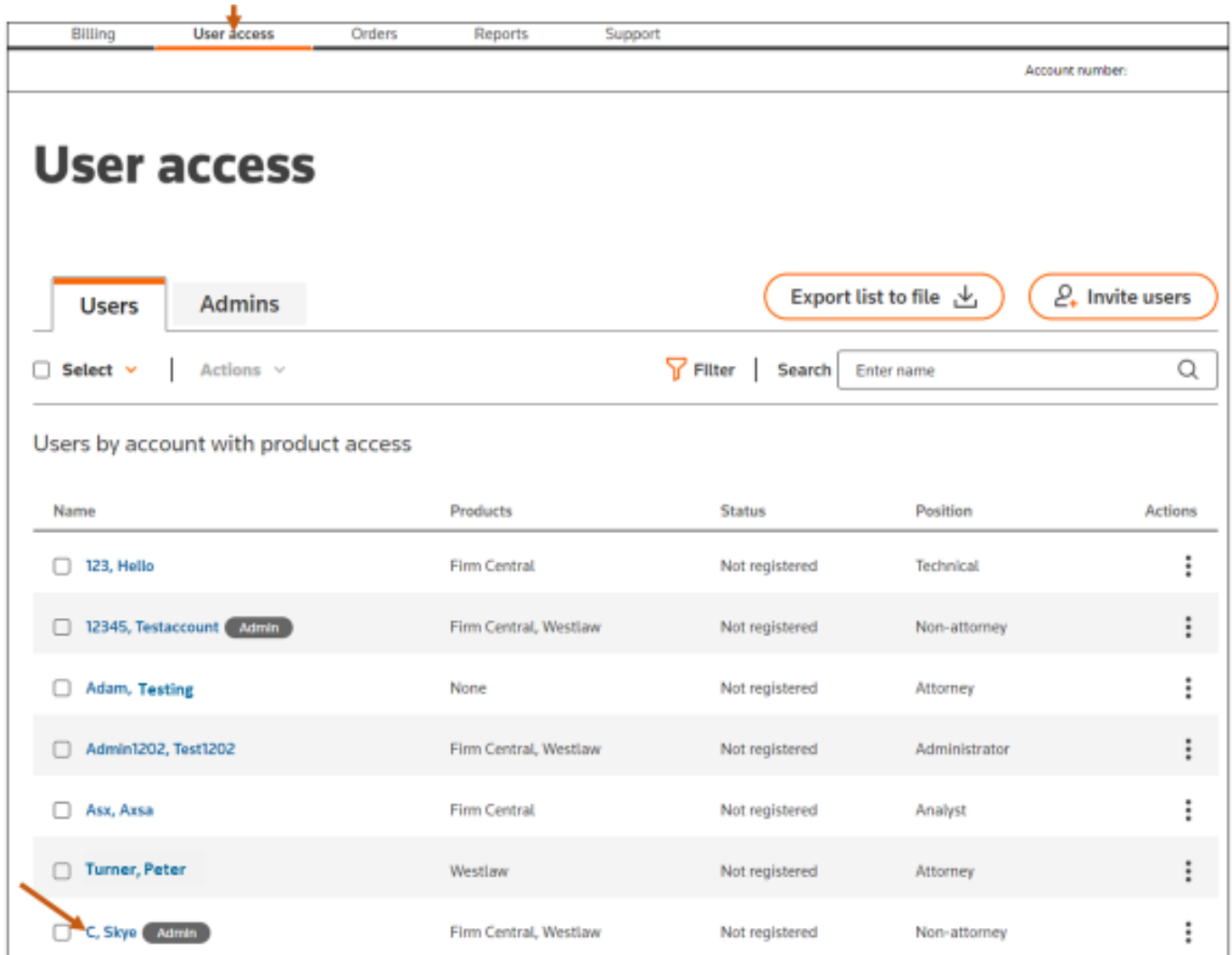
Viewing 1 - 1

Rows per page 10

Manage Product Users

View and Edit User Details

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



The screenshot displays the 'User access' tab in the Thomson Reuters Self-Service Portal. The tab is highlighted with an orange arrow. Below the tab, there are buttons for 'Users' and 'Admins', and a search bar. The main content area shows a list of users with the following columns: Name, Products, Status, Position, and Actions. The user 'C, Skye' is highlighted with an orange arrow pointing to their name.

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

Next, 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.

← Back to User access

Skye C
Status: **Not registered**

[Remove Skye](#)

Personal details

[Edit](#)

Name
Skye C

Contact ID
0021613335

Position
Non-attorney

Email
skye.c@abc.com

Phone
N/A

Permissions
Billing
Manage Orders and Subscriptions
User Access

End date

Products

[Edit products](#)

Products not yet registered ^

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

[Send registration links](#)

Firm Central Product admin

Registration key
13936496

Westlaw

Registration key
13936495

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

← Back to User access

Skye C

Status: **Not registered**

[Remove Skye](#)

Personal details

First name
Skye
First name can't be edited

Last name

Contact ID
0020613335
Contact ID can't be edited

Position
Non-attorney ▼

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

Phone (optional)

Permissions
Billing, Manage Orders and Subscrip... ▼

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

Save [Cancel](#)

Products

[Edit products](#)

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

Send registration links

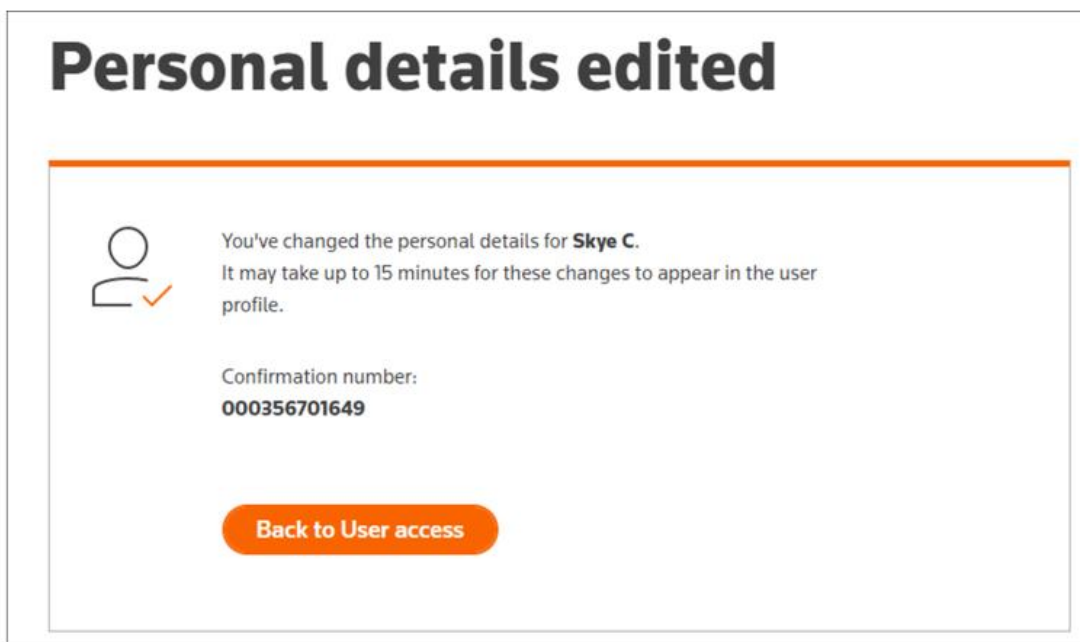
Firm Central Product admin

Registration key
13956495

Westlaw

Registration key
13956495

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



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

User access

Account number: _____

Users | Admins | [Export list to file](#) | [Invite users](#)

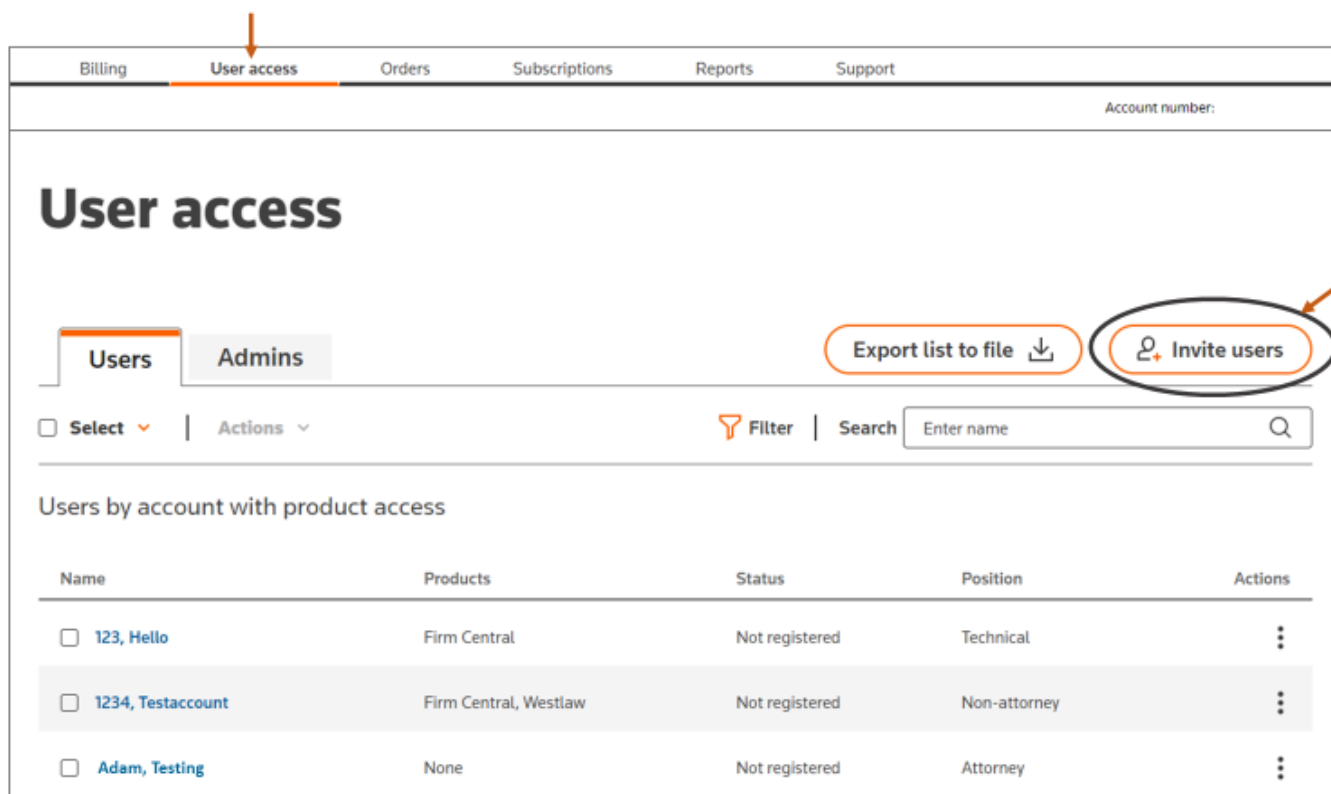
☐ Select | Actions | Filter | Search

Users by account with product access

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

Add Users


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




User access




Account number:

Users Admins

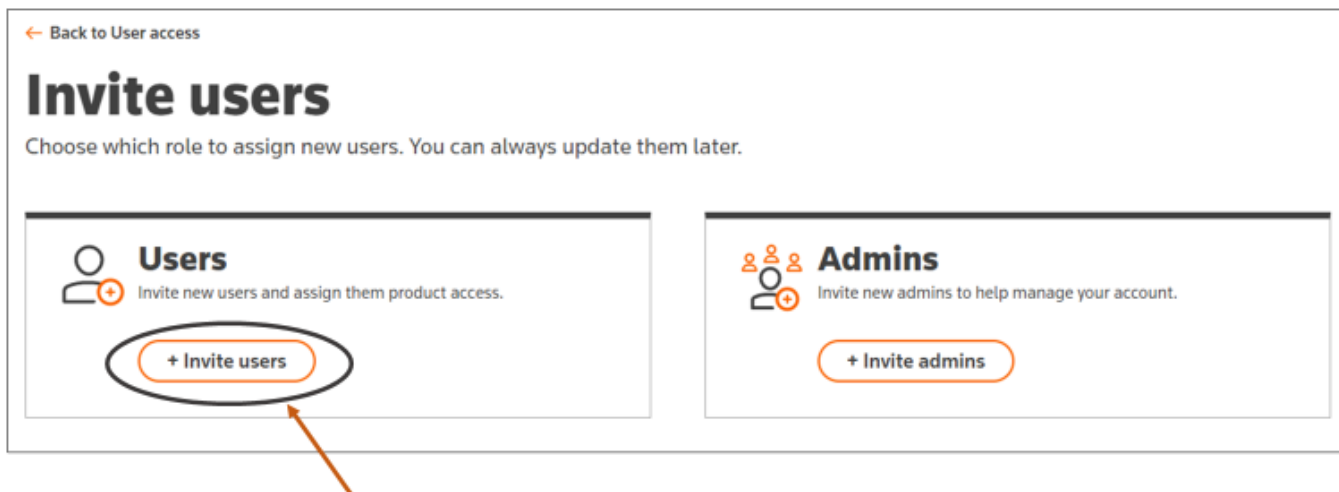
Export list to file  **Invite users**

☐ Select | Actions  Filter | Search

Users by account with product access

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


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



[← Back to User access](#)

Invite users


Choose which role to assign new users. You can always update them later.



Users

Invite new users and assign them product access.

+ Invite users



Admins

Invite new admins to help manage your account.

+ Invite admins

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

[← Back to User access](#)

Invite users

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

User details

Contact 1

First name

! Enter first name

Enter a first name.

Last name

Enter last name

Position

Choose

- Choose
- Analyst
- Attorney
- Clerk
- Contractor
- Investigator
- Judge
- Librarian
- Manager
- Non-attorney
- Paralegal
- Supervisor
- Technical

Email

Enter email

End date mm/dd/yyyy (optional)

Continue

Cancel

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

← Back to User access

Invite users

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

User details

Contact 1

First name: (Error icon) Enter a first name.

Last name:

Position: (Error icon) Choose a position.

Email:

End date mm/dd/yyyy (optional):

+ Add another user

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

← Back to User access

Invite users

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

User details

Contact 1 Remove X

First name: (Error icon) Enter a first name.

Last name:

Position: (Error icon) Choose a position.

Email:

End date mm/dd/yyyy (optional):

Contact 2 Remove X

First name: (Error icon) Enter a first name.

Last name:

Position:

Email:

End date mm/dd/yyyy (optional):

+ Add another user

Account

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

Account:

Address: 610 OPPERMAN DR
EAGAN VT USA

Continue Cancel

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

[← Back to User access](#)

Invite users

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

User details

Contact 1

First name

! Enter first name

Enter a first name.

Last name

Enter last name

Position

! Choose
 ▼

Choose a position.

Email

Enter email

End date mm/dd/yyyy (optional)

+ Add another user

Account

Name: ****TEST FOR FIRM CENTRAL **TESTING ONLY****
 Account: **100**
 Address: **610 OPPERMAN DR EAGAN VT USA**

Continue

Cancel

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

Invite users
Upload multiple people at once using an Excel file. Or [add them individually](#).

Upload user details

- Download template**
Use this file to enter multiple people at once.
[Excel Template](#)
- Enter user details**
Edit the spreadsheet, adding 1 user per row. To ensure proper formatting, make sure to enter details for each of the columns. But avoid changing any column headers or formulas.
- Upload completed template**
Once you've entered users and saved the file, upload it to continue assigning products.

Drop files to upload
Choose file
7 MB limit per upload

[Continue](#)

Excel Template: invite_users_template.xlsx

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

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

Invite users

User details

[Edit user details](#)

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

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

[← Back to User access](#)

Invite users

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

User details

Contact 1

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

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

[+ Add another user](#)

Account

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

Account: **100**

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

Continue
Cancel

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

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

- Back to User access** (link)
- Invite users** (header)
- User details** (section with a table):

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

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

Account: **100-**

Address: **610 OPPERMAN DR EAGAN VT USA**
- Products** (section):

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

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

 - ☒ **Westlaw** (circled in orange)
 - ☐ **Firm Central**

Continue (circled in orange) [Cancel](#)

An orange arrow points from the 'Continue' button in the Products section to a modal window that appears:

☐ **Firm Central**

Product admin (optional)

☐ **Firm Central Administrator**

Continue [Cancel](#)

An orange arrow points from the 'Continue' button in the modal window back to the 'Continue' button in the Products section.

Then, click **Invite users**.

[← Back to User access](#)

Review details

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

User details

[Edit user details](#)

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

Account

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

Account: 100

Address: 610 OPPERMAN DR
EAGAN VT USA

Products

[Edit products](#)

Westlaw

Confirmation email

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

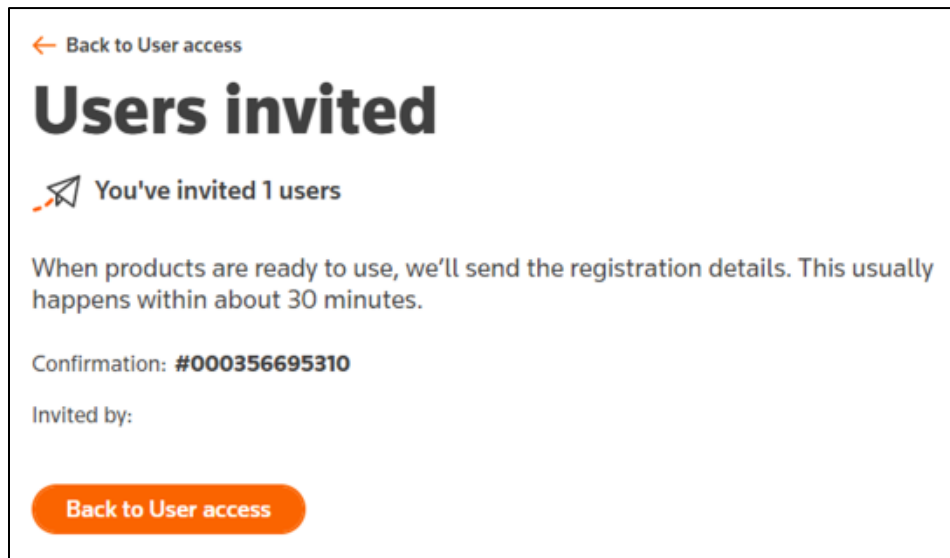
Notify invited users

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

☒ Send links to users

[Cancel](#)

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.

User access

Added 1 user
It can take up to 30 minutes for all systems to reflect this. [Dismiss X](#)

Users Admins [Export list to file](#) [Invite users](#)

☐ Select ☐ Actions [Filter](#) Search

Users by account with product access

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

Remove Users

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

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

User access

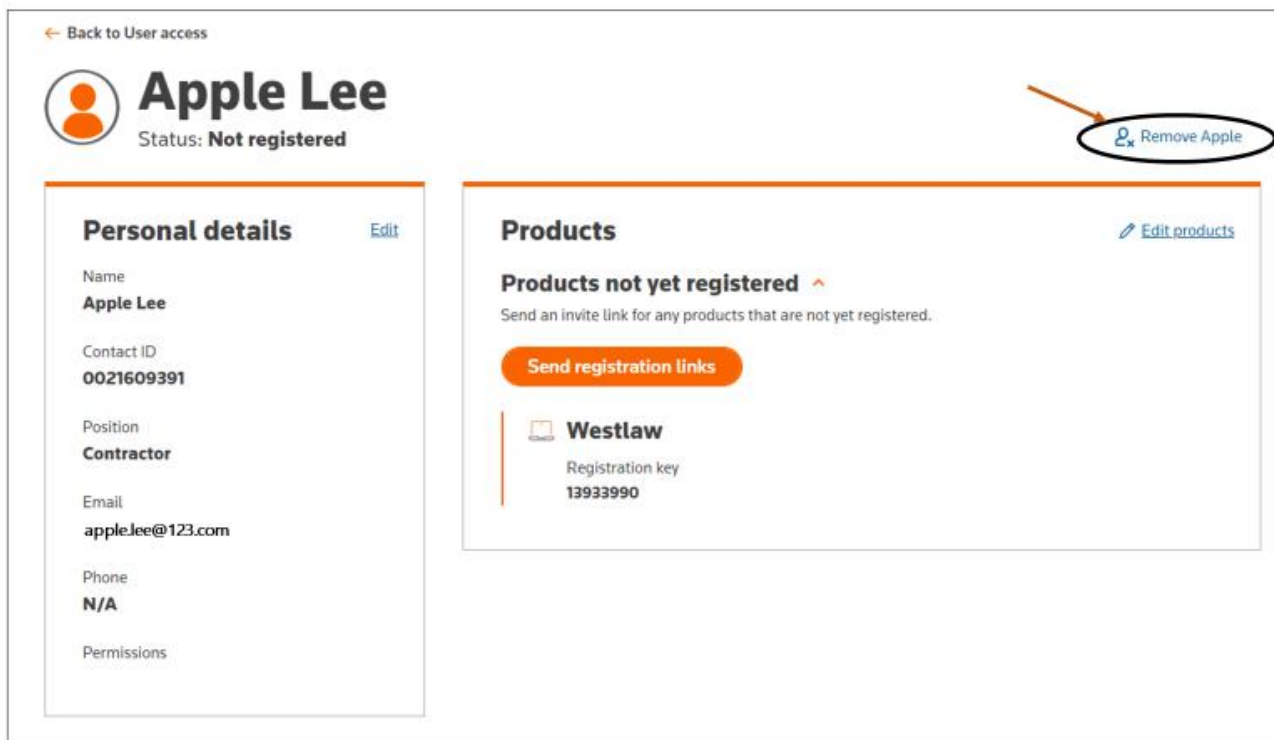
Users | Admins | Export list to file | Invite users

Select | Actions | Filter | Search | Enter name

Users by account with product access

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

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



← Back to User access

Apple Lee
Status: **Not registered**

Personal details [Edit](#)

Name
Apple Lee

Contact ID
0021609391

Position
Contractor

Email
applelee@123.com

Phone
N/A

Permissions

Products [Edit products](#)

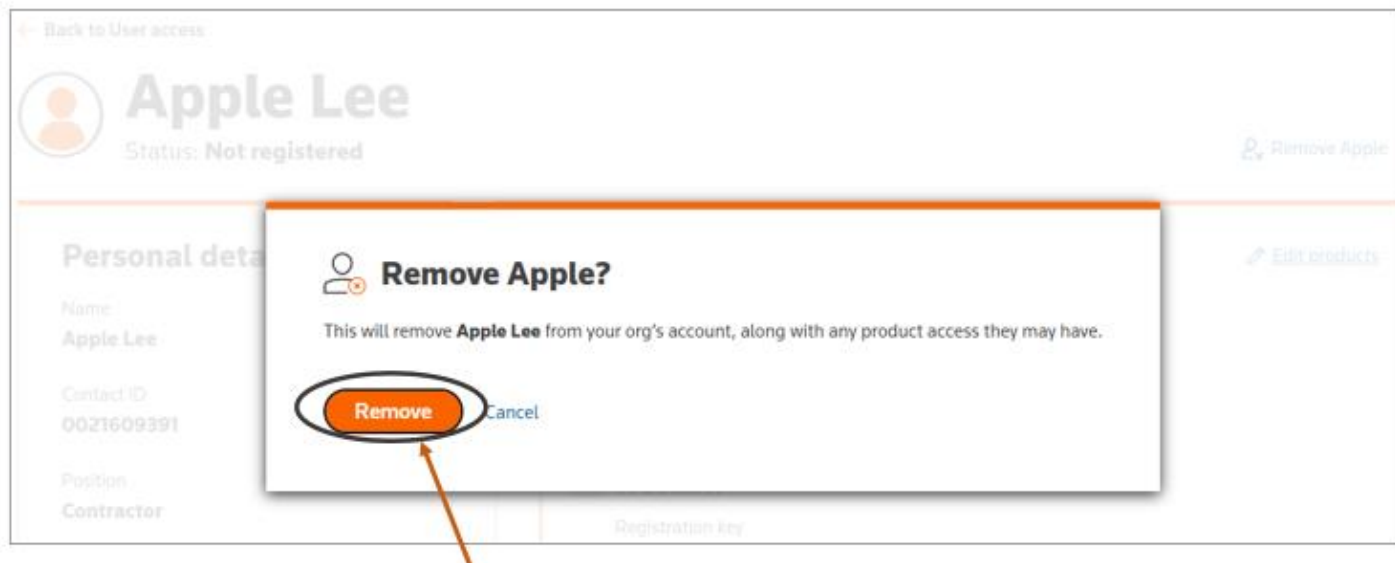
Products not yet registered ^
Send an invite link for any products that are not yet registered.

[Send registration links](#)

Westlaw
Registration key
13933990

[Remove Apple](#)

Then, click **Remove**.



← Back to User access

Apple Lee
Status: **Not registered**

Personal details [Edit](#)

Name
Apple Lee

Contact ID
0021609391

Position
Contractor

Registration key

Remove Apple?

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

[Remove](#) [Cancel](#)

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

The screenshot shows the 'User access' page with a navigation bar at the top containing 'Billing', 'User access' (highlighted), 'Orders', 'Subscriptions', 'Reports', and 'Support'. Below the navigation bar is a search bar and buttons for 'Export list to file' and 'Invite users'. The main section is titled 'User access' and has tabs for 'Users' and 'Admins'. Below the tabs is a table of users with columns: Name, Products, Status, Position, and Actions. The table lists several users, including 'P, Sadie' who is marked as an 'Admin'. An arrow points to the 'Actions' menu for 'P, Sadie', which is open and shows options: 'Send registration links', 'Edit products', and 'Remove user' (circled). Another arrow points to the 'Remove user' option.

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

Then, click **Remove**.

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

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

Removing user

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

Confirmation number:
000356695601

Back to User access

Billing
User access
Orders
Subscriptions
Reports
Support

Account number: ▼

User access

i

Removed 1 user

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

Users Admins

Export list to file

Invite users

☐ Select | Actions ▼

Filter | Search

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

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

The screenshot displays the 'User access' interface. At the top, a navigation bar includes 'Billing', 'User access' (highlighted), 'Orders', 'Subscriptions', 'Reports', and 'Support'. Below this, the 'User access' title is followed by tabs for 'Users' and 'Admins'. To the right are buttons for 'Export list to file' and 'Invite users'. A 'Select' dropdown and an 'Actions' dropdown (with a carrot icon) are visible. The 'Actions' dropdown is open, showing 'Send registration links' and 'Remove users' (circled). Below the dropdown is a table of users with columns: Name, Products, Status, Position, and Actions. The table lists several users, including 'Lee, Apple' and 'P, Sadie' (marked as Admin), both of whom have their selection checkboxes checked. A search bar and a filter icon are also present.

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

Next, click **Confirm**.

Review details

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

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

Confirm
Cancel

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

Review details

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

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

Confirm
Cancel

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

Send/Resend Product Registration Links

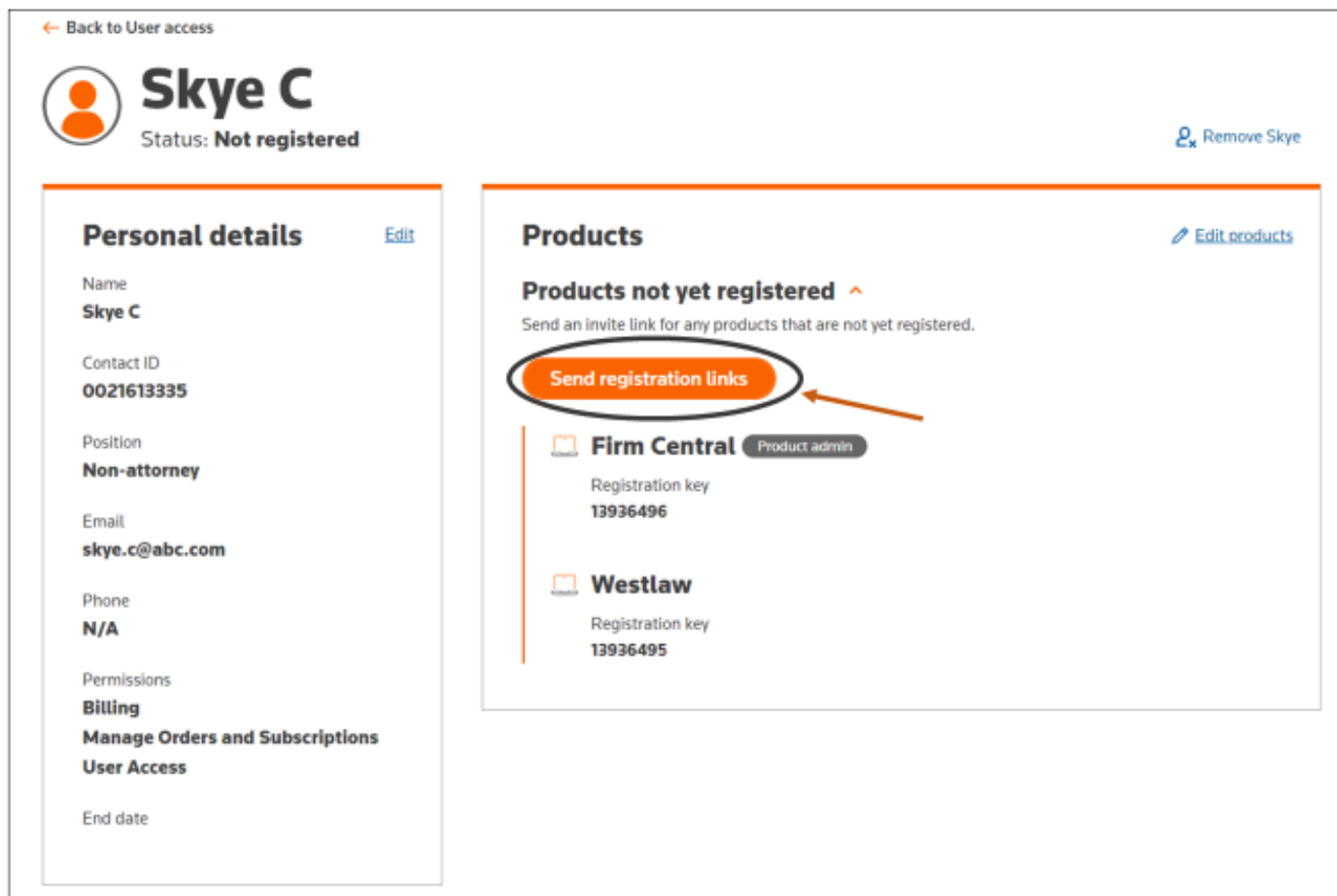
There are three ways to send product registration links to users.

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

The screenshot displays the 'User access' section of the Thomson Reuters Self-Service Portal. The top navigation bar includes 'Billing', 'User access' (highlighted), 'Orders', 'Reports', and 'Support'. Below this, the 'User access' title is prominently displayed. The 'Users' sub-tab is selected, and the 'Admins' sub-tab is also visible. To the right of the sub-tabs are buttons for 'Export list to file' and 'Invite users'. Below the sub-tabs, there are filters for 'Select' and 'Actions', a 'Filter' button, and a search bar labeled 'Search' with the placeholder text 'Enter name'. The main content area is titled 'Users by account with product access' and contains a table with the following columns: Name, Products, Status, Position, and Actions. The table lists seven users, with the last user, 'C. Skye', highlighted by an orange arrow. The user 'C. Skye' is marked as an 'Admin' and has the status 'Not registered'.

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

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



← Back to User access

Skye C
Status: **Not registered**

[Remove Skye](#)

Personal details

[Edit](#)

Name
Skye C

Contact ID
0021613335

Position
Non-attorney

Email
skye.c@abc.com

Phone
N/A

Permissions
Billing
Manage Orders and Subscriptions
User Access

End date

Products

[Edit products](#)

Products not yet registered ^

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

Send registration links

Firm Central

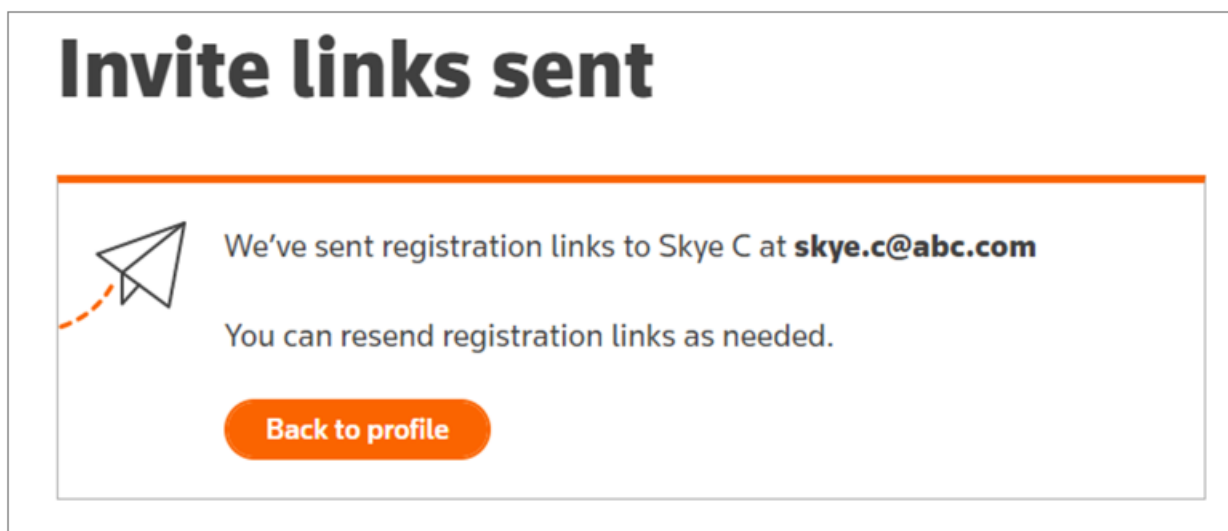
Product admin

Registration key
13936496


Westlaw

Registration key
13936495

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



Invite links sent



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

You can resend registration links as needed.

Back to profile

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

The screenshot shows the 'User access' tab selected in the top navigation bar. Below the navigation bar, there are tabs for 'Users' and 'Admins'. A search bar and a filter icon are present. The main content area displays a table titled 'Users by account with product access'. The table has columns for Name, Products, Status, Position, and Actions. The 'Actions' column for the user 'C, Skye' is highlighted, and a dropdown menu is open, showing the option 'Send registration links' circled in red. An arrow points to the 'Actions' column header.

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

Next, click **Send**.

The screenshot shows a dialog box titled 'Send registration links?'. The text inside the dialog box states: 'Registration links will be sent to skye.c@abc.com for products that are not yet registered'. There are two buttons: 'Send' (highlighted with a red circle and an arrow) and 'Cancel'.

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

The screenshot displays the 'User access' section of the Thomson Reuters Self-Service Portal. The 'Users' tab is selected, and a green notification box at the bottom indicates that registration links have been sent to the user. The table below lists users by account with product access.

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

Registration links have been sent to the user

- 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**.

User access

Users Admins

Export list to file Invite users

Select Actions Filter Search Enter name

Users by account access

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

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

Review details

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

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

Email Options

Choose who should receive registration details:

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

☒ Send registration details and links directly to selected users

Confirm

Cancel

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

Review details

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

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

Email Options

Choose who should receive registration details:

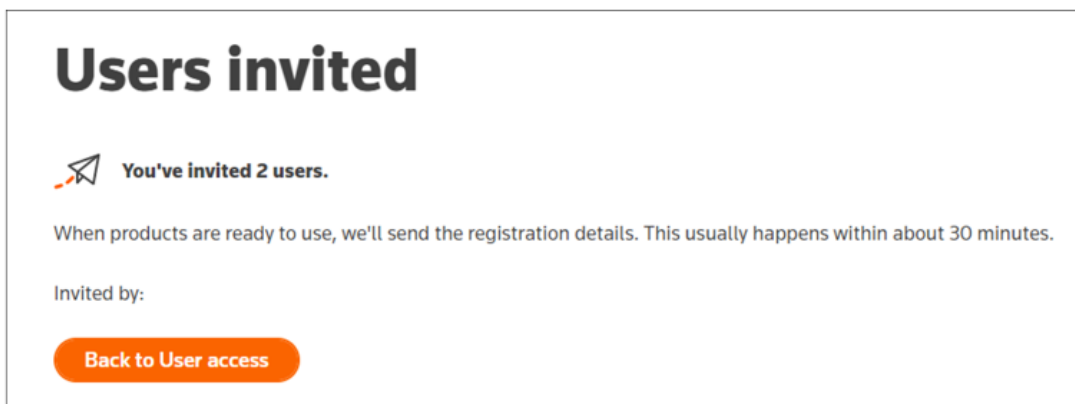
☒ Send registration details for all selected users to me at Testingcentral@mailinator.com

☒ Send registration details and links directly to selected users

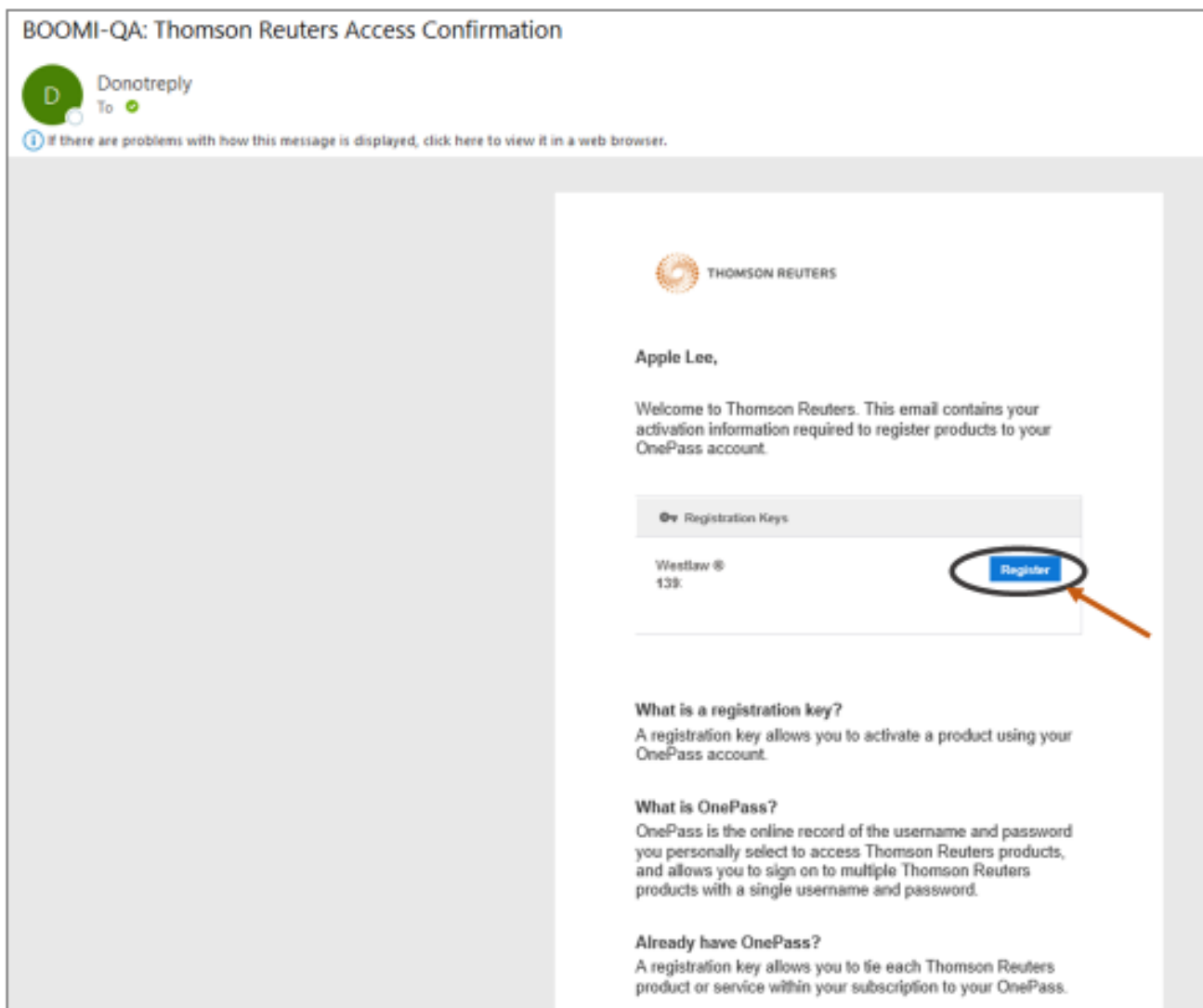
Confirm

Cancel

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



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



Reset Password for a User

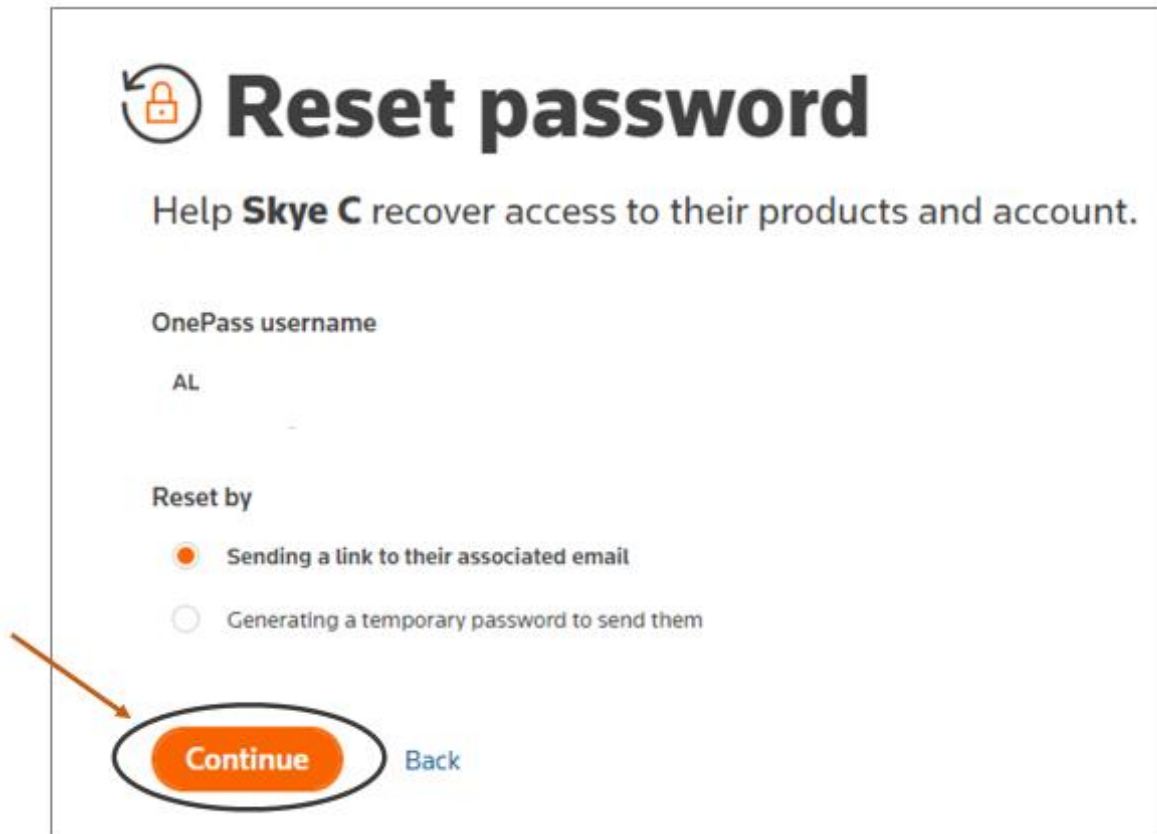
There are two ways to reset a user's password.


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

The screenshot displays the 'User access' section of the Thomson Reuters Self-Service Portal. The top navigation bar includes 'Billing', 'User access' (selected), and 'Support'. The 'Account number:' field is visible in the top right. The main heading is 'User access'. Below it, there are tabs for 'Users' and 'Admins', and buttons for 'Export list to file' and 'Invite users'. A search bar with 'Enter name' and a 'Filter' button are also present. The table 'Users by account with product access' lists four users: 'Fast, Brent' (Partially registered), 'Sands, Tom' (Registered), 'C, Skye' (Data Privacy Advisor), and 'Core with ids text' (UK Books, Westlaw UK). The 'Actions' column for 'Sands, Tom' is expanded, showing a dropdown menu with 'Edit products', 'Reset password' (circled), and 'Remove user'. An arrow points to the 'Actions' column header.

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

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



 **Reset password**

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

OnePass username

AL

Reset by

☒ Sending a link to their associated email

☐ Generating a temporary password to send them

Continue [Back](#)

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

Account number:

User access

Users Admins

Export list to file Invite users

Select Actions Filter Search Enter name

Users by account with product access

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

Next, click Reset password on the right side.

[← Back to User access](#)

Skye C
Status: **Registered**

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

Personal details

[Edit](#)

Name
Skye C

Contact ID
0021874781

Email

Phone
N/A

Permissions

Products

[Edit products](#)


Registered products ^


OnePass username:

Data Privacy Advisor

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

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



 **Reset password**

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

OnePass username

AL

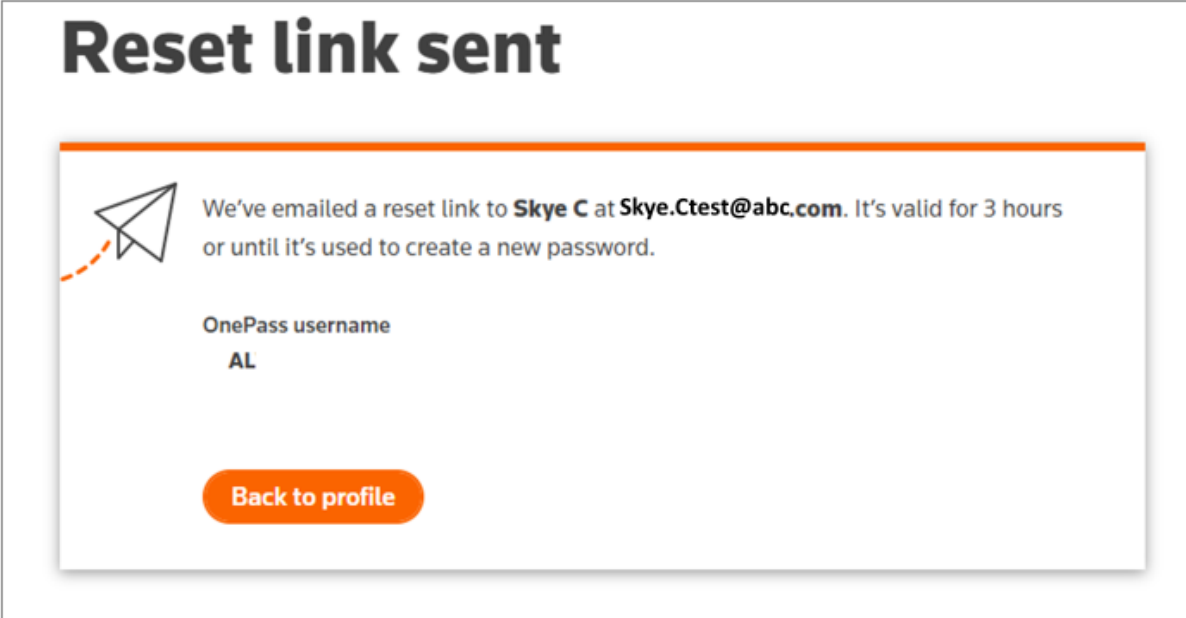
Reset by

☒ Sending a link to their associated email


☐ Generating a temporary password to send them

Continue [Back](#)

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



Reset link sent

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

OnePass username

AL

Back to profile

Edit Product Access (Add/Remove Product Access)

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

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

Account number:

User access

Users Admins

Export list to file

Invite users

☐ Select | Actions


Filter | Search

Users by account with product access

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

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

[← Back to User access](#)



Skye C
Status: **Not registered**

[Remove Skye](#)

Personal details
[Edit](#)

Name
Skye C

Contact ID
0021613335

Position
Non-attorney

Email
skye.c@abc.com

Phone
N/A


Permissions
Billing
Manage Orders and Subscriptions
User Access

End date


Products

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

Send registration links


Firm Central
Product admin

Registration key
13936496


Westlaw

Registration key
13936495

[Edit products](#)

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

Edit products
 Change products or subscriptions for Skye C.

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

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

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

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

- 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**.

User access

Users Admins

Export list to file Invite users

Select | Actions Filter | Search

Users by account with product access

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

Send registration links
Edit products
Remove user

Actions

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

Edit products

Change products or subscriptions for Skye C.

Select products

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

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

☐ **Westlaw**

☒ **Firm Central** ⬆

Product admin (optional)

☒ Firm Central Administrator

☐ **Thomson Reuters Regulatory Intelligence** ⚠ All seats assigned. ⬇

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

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

Products edited

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

Confirmation number
000356701638

Back to User access

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

Account number:

User access

Users Admins

Export list to file Invite users

Select Actions Filter Search

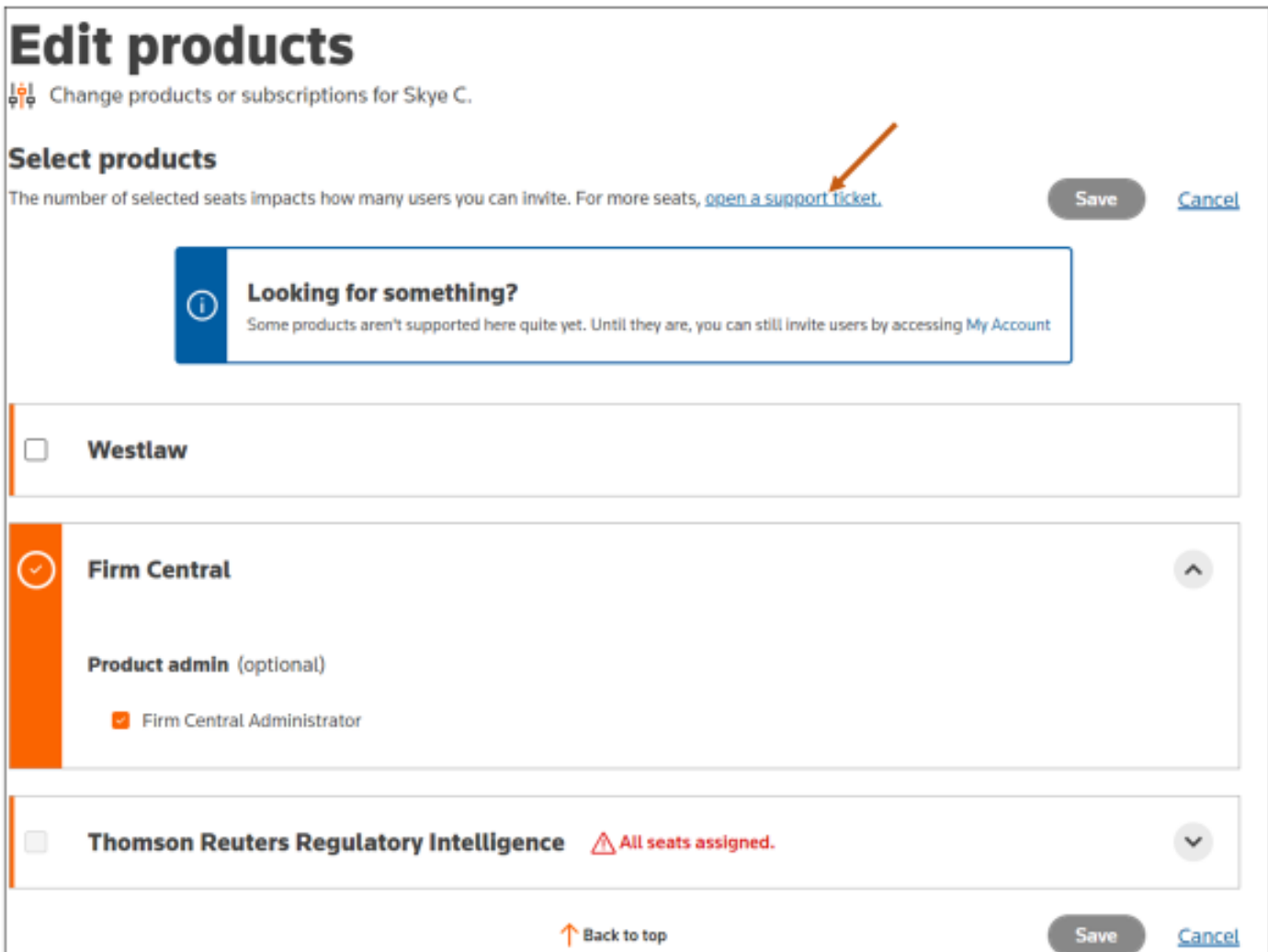
Users by account with product access

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


Add Additional Seats

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

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




Edit products



 Change products or subscriptions for Skye C.


Select products

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

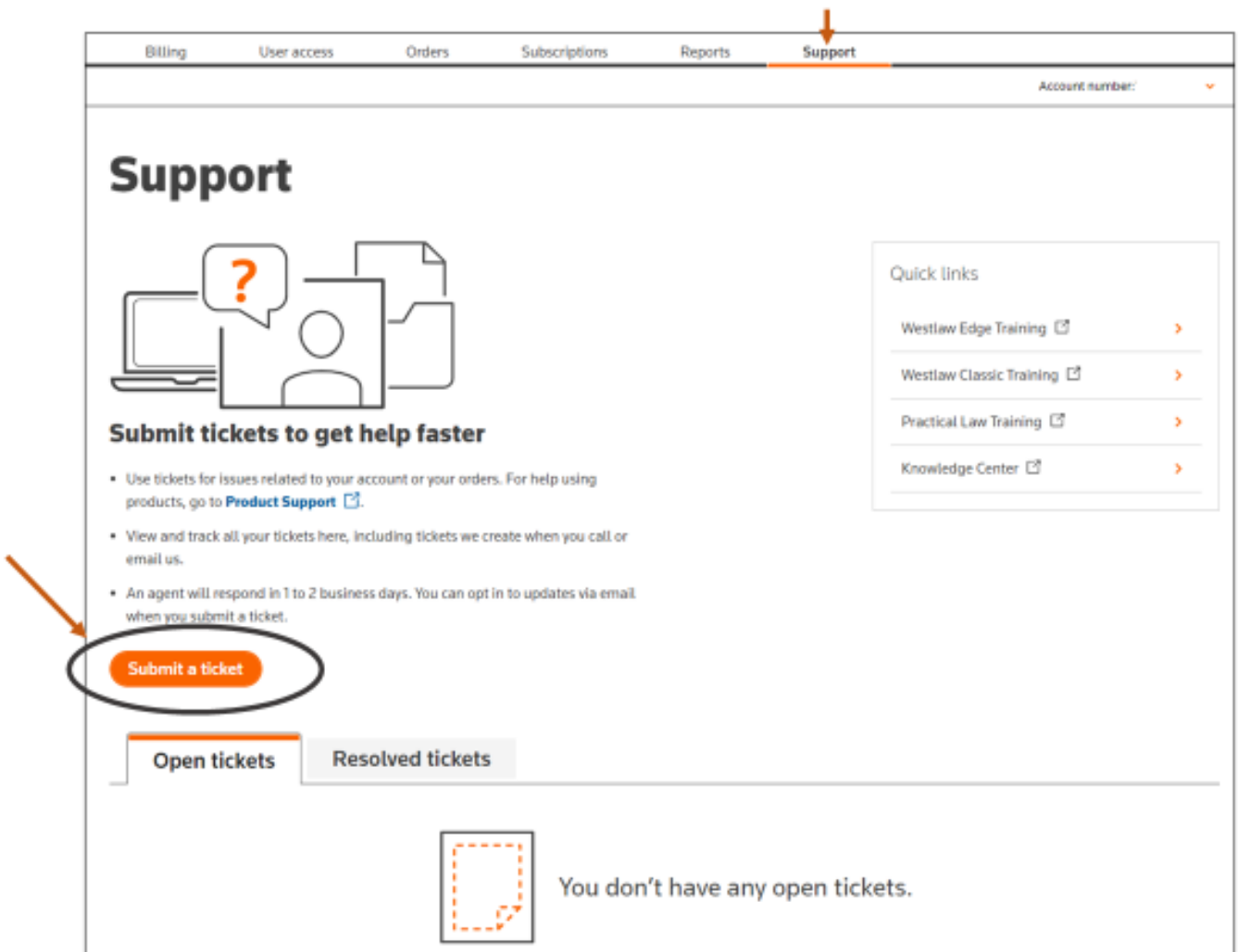
Save [Cancel](#)

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

<input type="checkbox"/>	Westlaw	
<input checked="" type="checkbox"/>	Firm Central	
	Product admin (optional)	
	<input checked="" type="checkbox"/> Firm Central Administrator	
<input type="checkbox"/>	Thomson Reuters Regulatory Intelligence	 ⚠ All seats assigned.

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

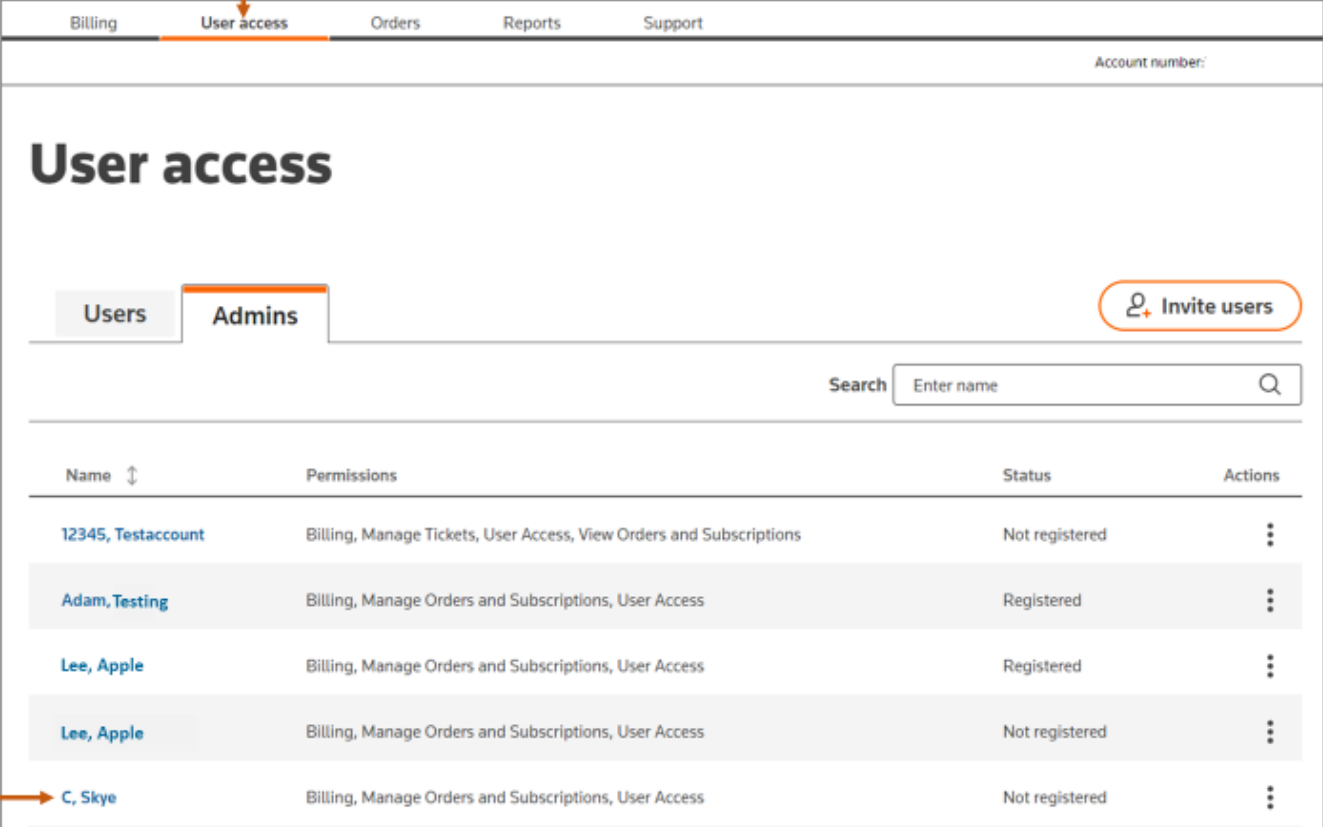
To open a support ticket using the Support tab, navigate to the **Support** tab and click **Submit a ticket**.



Manage Administrative Users

View and Edit Administrator User Details

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




The screenshot displays the 'User access' section of the self-service portal. At the top, there is a navigation bar with tabs: Billing, User access (highlighted with an orange arrow), Orders, Reports, and Support. Below this, the 'User access' title is prominently displayed. Underneath the title, there are two sub-tabs: 'Users' and 'Admins' (highlighted with an orange arrow). To the right of these tabs is an 'Invite users' button. Below the tabs is a search bar labeled 'Search' with the placeholder text 'Enter name' and a magnifying glass icon. The main content area contains a table with the following columns: Name (with a sort icon), Permissions, Status, and Actions. The table lists five users. The user 'C, Skye' is highlighted with an orange arrow pointing to their name in the 'Name' column.


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

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

[← Back to User access](#)



Skye C
 Status: **Not registered**

 Remove Skye

Personal details [Edit](#)

Name
Skye C

Contact ID
0021613335

Position
Non-attorney

Email
skye.c@abc.com

Phone
N/A


Permissions
Billing
Manage Orders and Subscriptions
User Access

End date


Products [Edit products](#)

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

[Send registration links](#)

 **Firm Central** Product admin


Registration key
13936496

 **Westlaw**

Registration key
13936495

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

[← Back to User access](#)



Skye C
 Status: **Not registered**

[Remove Skye](#)

Personal details

[Edit](#)

Name
Skye C

Contact ID
0021613335

Position
Non-attorney

Email
skye.c@abc.com

Phone
N/A

Permissions
Billing
Manage Orders and Subscriptions
User Access

End date


Products

[Edit products](#)

Products not yet registered ^


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

[Send registration links](#)


Firm Central

Product admin


Registration key
13936496


Westlaw

Registration key
13936495

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

[← Back to User access](#)



Skye C
 Status: **Not registered**

[Remove Skye](#)

Personal details

First name
 Skye
First name can't be edited

Last name


Contact ID
 002613335
Contact ID can't be edited

Position

Non-attorney

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

Phone (optional)



Permissions

Billing, Manage Orders and Subscrip...

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

Save

Cancel


Products

[Edit products](#)

Products not yet registered ▲


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

Send registration links


Firm Central

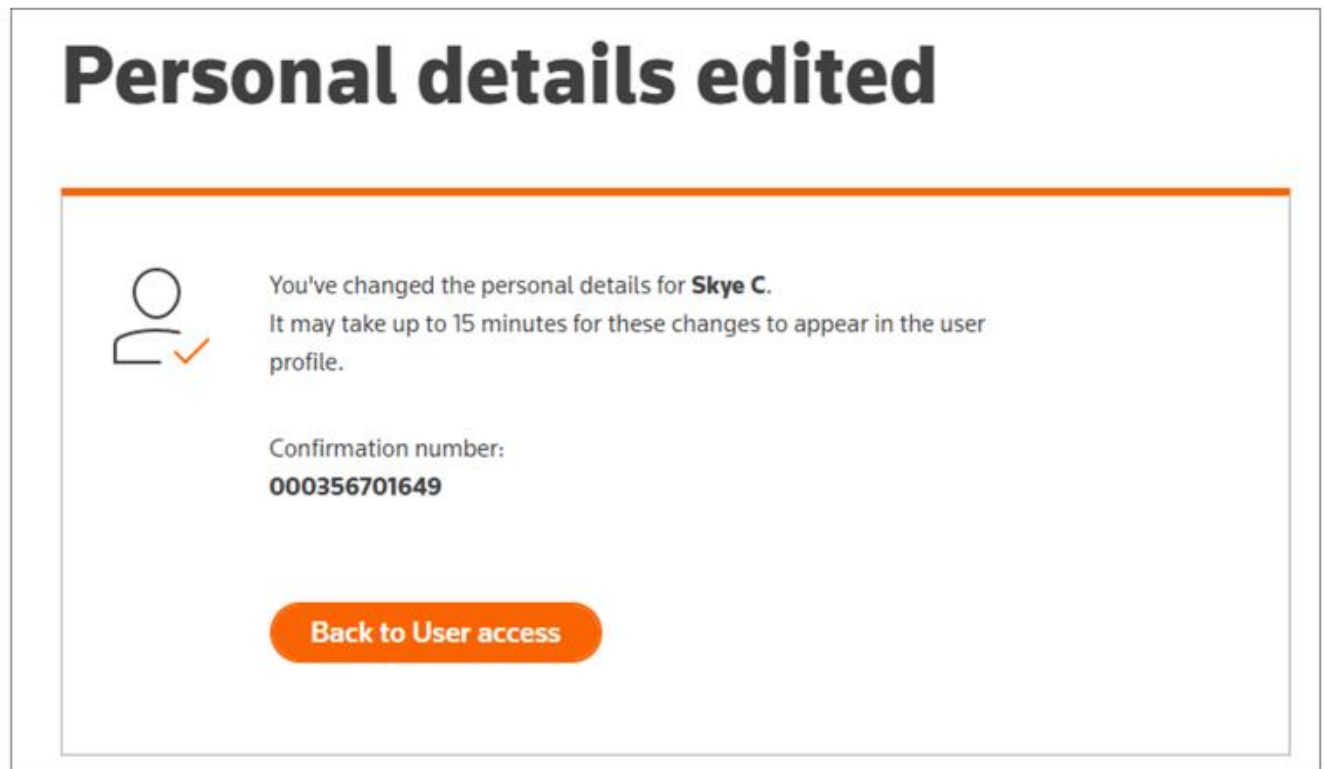
Product admin

Registration key
 13936496


Westlaw

Registration key
 13936496

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



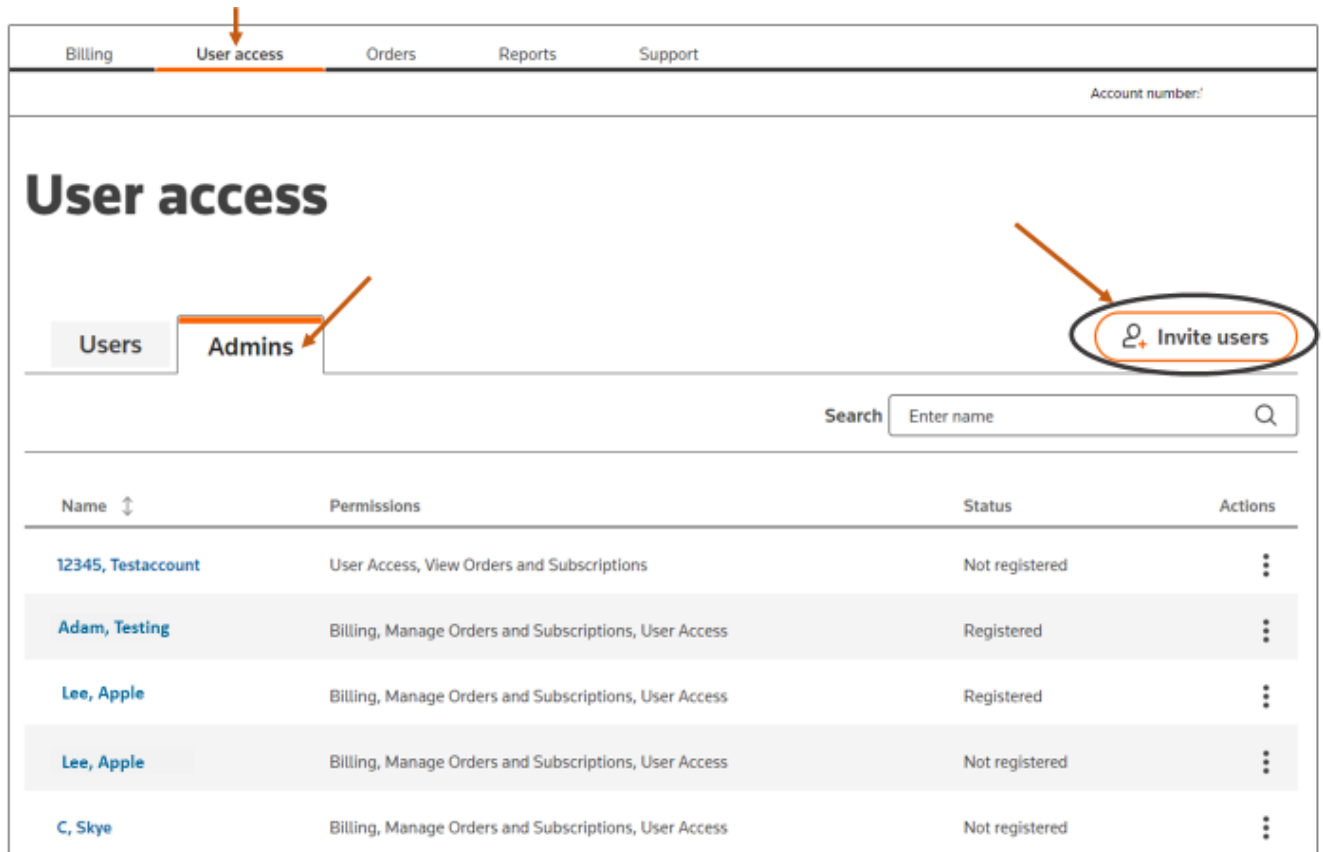
If you navigate back to the **User access** tab, the status for the user will appear as **Updating user** until the changes are fully processed.

The screenshot shows the 'User access' tab selected in the top navigation bar. Below the navigation bar, there's a header section with 'User access' and 'Account number:'. The main content area has tabs for 'Users' and 'Admins', with 'Users' being active. There are buttons for 'Export list to file' and 'Invite users'. Below these are filters and a search bar. The main table lists users with columns: Name, Products, Status, Position, and Actions. The last user in the list, 'C, Skye', has a status of 'Updating user' circled in red, and an arrow points to their name.

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

Add Administrator Users

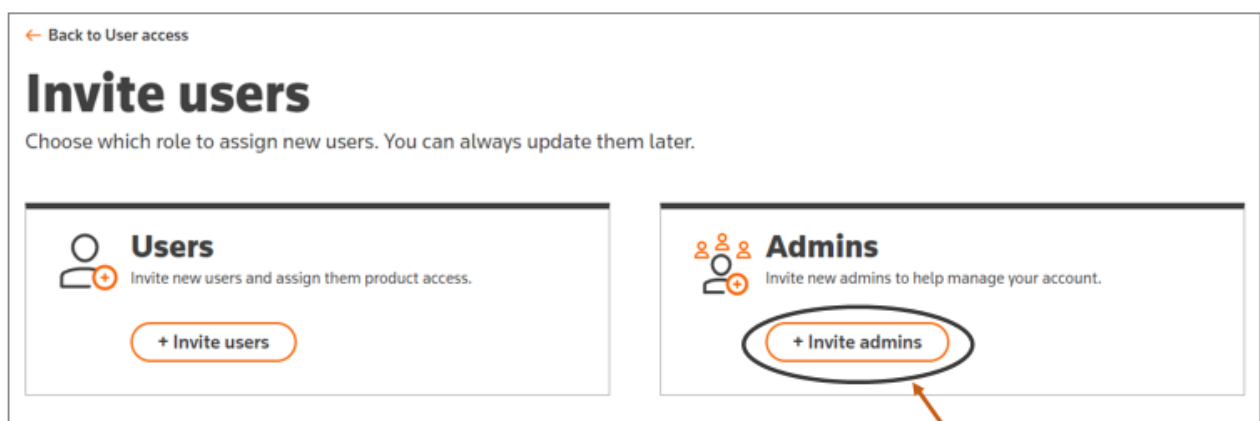
Navigate to the **User access** tab. Next, click the **Admins** tab. Then, click **Invite users**.



The screenshot shows the 'User access' portal. At the top, there are tabs: Billing, User access (selected), Orders, Reports, and Support. Below the tabs, there's a search bar with the text 'Search' and 'Enter name'. The main content area is titled 'User access'. On the left, there are two tabs: 'Users' and 'Admins' (selected). On the right, there's a button labeled '+ Invite users' which is circled in orange. Below the tabs, there's a table with columns: Name, Permissions, Status, and Actions. The table contains five rows of user data.

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

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



The screenshot shows the 'Invite users' page. At the top, there's a link '← Back to User access'. The main heading is 'Invite users' with a subtext 'Choose which role to assign new users. You can always update them later.' Below this, there are two sections: 'Users' and 'Admins'. The 'Users' section has a button '+ Invite users'. The 'Admins' section has a button '+ Invite admins' which is circled in orange and has an arrow pointing to it.

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

[← Back to User access](#)

Invite admins

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

Admin details

Contact 1

First name

Last name

Enter a first name.

Email

+ Add another user

Account

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

Account: **100**

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

Choose permissions

☐ Billing
View and pay Invoices

☐ Manage Orders and Subscriptions
Manage Orders and Subscriptions

☐ Manage Tickets
Manage Tickets

☐ User Access
Add, edit and delete users

☐ View Orders and Subscriptions
View Orders and Subscriptions

Continue

Cancel


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

[← Back to User access](#)

Invite admins

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

Admin details

 Contact 1

First name

Sadie

Last name


P

Permissions

Billing, User Access, Manage... ▼

Email

sadie.p@abc.com

 + Add another user

Account

Name:

****TEST FOR
FIRM CENTRAL **TESTING
ONLY****

Account:

100

Address:

**610 OPPERMAN DR
EAGAN VT USA**

Continue

Cancel

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

[← Back to User access](#)

Invite admins

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

Admin details

Contact 1
Remove X

First name

Last name

Permissions

Email

Contact 2
Remove X

First name

Last name

Permissions

Email

[+ Add another user](#)

Account

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

Accounts:
100

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

Continue
Cancel

Then, click **Invite admins**.

← Back to User access

Review details

Invites will get sent directly to admins after submitting.

Admin details

[Edit admin details](#)

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

Account

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

Account: **100**

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

Confirmation email

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

[Invite admins](#) [Cancel](#)

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

← Back to User access

Admins invited

You've invited one person with admin permissions.

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

Invited by:

[Back to User access](#)

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

User access

Added 1 admin
It can take up to 30 minutes for all systems to reflect this. [Dismiss X](#)


Users Admins [Invite users](#)

Search

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

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

[← Back to User access](#)



Sadie P

Status: **Not registered**

[Remove user](#)

Personal details

[Edit](#)

Name
Sadie P


Email
sadie.p@abc.com

Phone
N/A

Permissions
Billing
Manage Orders and Subscriptions
User Access

Products

This person doesn't have access to products yet.



[Add products](#)

Account details

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

[Resend invite](#)

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

Billing **User access** Orders Subscriptions Reports Support

Alice testcspmyasyne Account number:1004315216

Add products

Add products or subscriptions for Sadie P.

End date mm/dd/yyyy (optional)

Select products

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

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

☐ Westlaw

☐ Firm Central

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

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

[Back to User access](#)

Products added

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

Confirmation: **#000356695606**

Invited by:

Back to User access

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

User access

Added 1 user
It can take up to 30 minutes for all systems to reflect this. [Dismiss X](#)

Users Admins [Export list to file](#) [Invite users](#)

☐ Select ☐ Actions [Filter](#) Search

Users by account with product access

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

Remove an Admin User

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

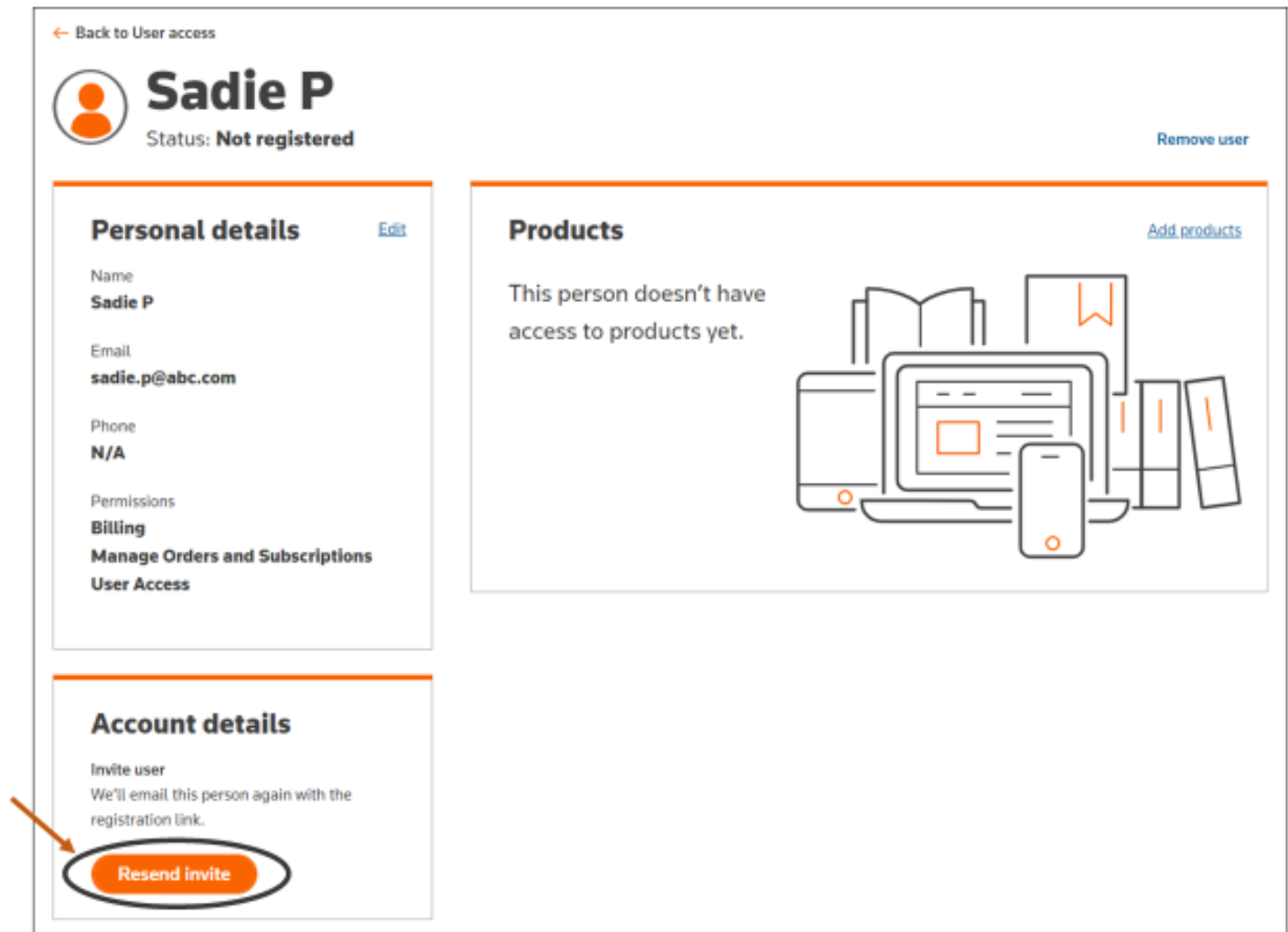
Resend Invitation to an Admin User

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

The screenshot shows the 'User access' section of a self-service portal. At the top, there are navigation tabs: 'Billing', 'User access' (highlighted with an orange arrow), 'Orders', 'Reports', and 'Support'. Below these, the 'User access' title is displayed. Underneath the title, there are two sub-tabs: 'Users' and 'Admins' (highlighted with an orange arrow). To the right of these tabs is a button labeled 'Invite users' with a plus icon. Below the tabs is a search bar with the placeholder text 'Enter name' and a magnifying glass icon. Below the search bar is a table with four columns: 'Name', 'Permissions', 'Status', and 'Actions'. The table contains three rows of user data. The second row, for 'P, Sadie', is highlighted with a light gray background and an orange arrow pointing to the name. The first row is for 'Singh, Carol' and the third row is for 'P, Sadie'.

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

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



← Back to User access

Sadie P
Status: **Not registered** [Remove user](#)

Personal details [Edit](#)

Name
Sadie P


Email
sadie.p@abc.com

Phone
N/A

Permissions
Billing
Manage Orders and Subscriptions
User Access

Products [Add products](#)

This person doesn't have access to products yet.




Account details

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

Resend invite

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

[← Back to User access](#)



Sadie P

Status: **Not registered**

[Remove user](#)

Personal details

[Edit](#)

Name

Sadie P

Email

sadie.p@abc.com

Phone

N/A

Permissions

Billing


Manage Orders and Subscriptions

User Access

Products

[Add products](#)


This person doesn't have access to products yet.



Account details

Invite user

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



Invite sent

Reset Password for an Admin User


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

The screenshot shows the 'User access' section of the Thomson Reuters Self-Service Portal. The top navigation bar includes 'Billing', 'User access' (selected), and 'Support'. Below this, the 'User access' title is displayed. A sub-navigation bar shows 'Users' and 'Admins' (selected). An 'Invite users' button is located on the right. A search bar with the placeholder 'Enter name' is also present. The main content is a table with the following data:

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

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

[← Back to User access](#)



Test Clone

Status: **Registered**

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

Personal details

[Edit](#)

Name
Test Clone

Email
test.clone@tr.com


Phone
N/A

Permissions
Billing
User Access

Products

[Add products](#)

This person doesn't have access to products yet.



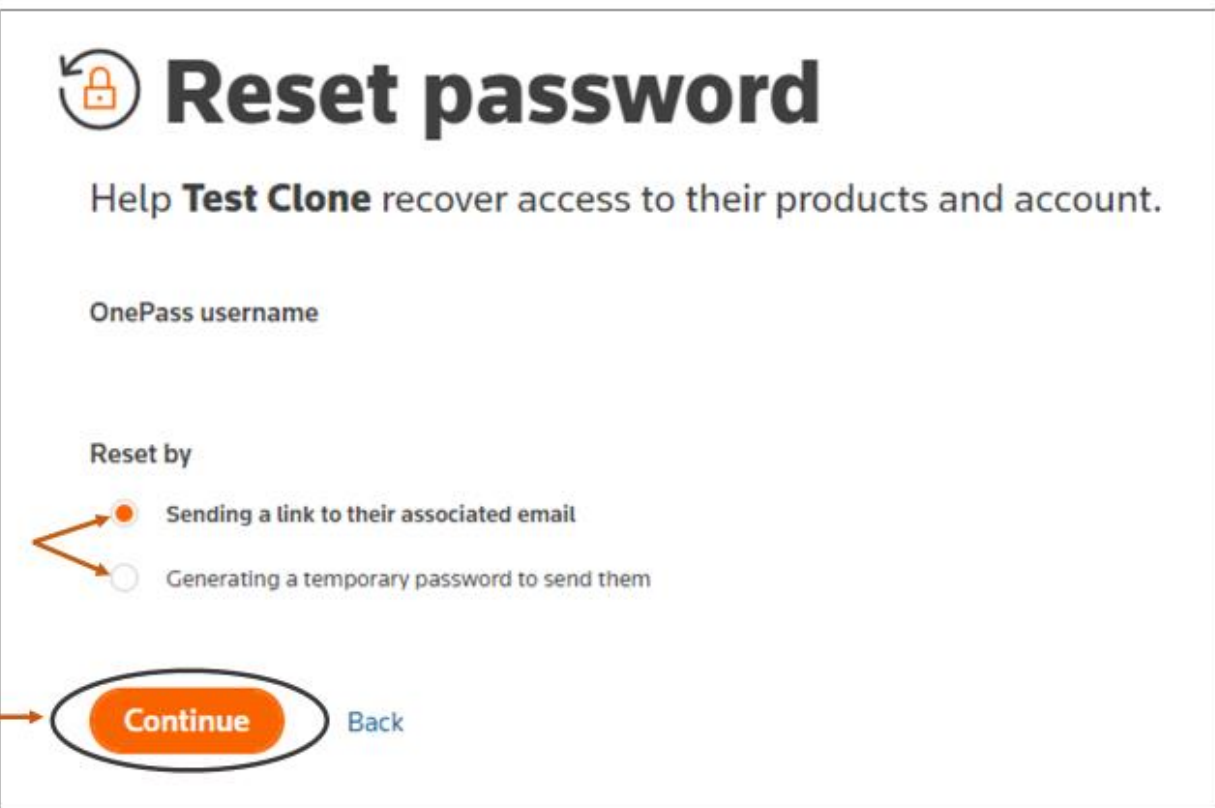
Account details

OnePass username

Registration key

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

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**.



The screenshot shows a 'Reset password' form. At the top, there is a circular icon with a padlock and a curved arrow, followed by the title 'Reset password' in a large, bold font. Below the title, a subtitle reads 'Help **Test Clone** recover access to their products and account.' The form contains a text input field labeled 'OnePass username'. Below this is a section titled 'Reset by' with two radio button options. The first option, 'Sending a link to their associated email', is selected and indicated by an orange arrow. The second option is 'Generating a temporary password to send them'. At the bottom of the form, there are two buttons: 'Continue' and 'Back'. The 'Continue' button is orange and is circled with a black oval, with an orange arrow pointing to it from the left. The 'Back' button is a blue text link.

Reset password

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

OnePass username

Reset by

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

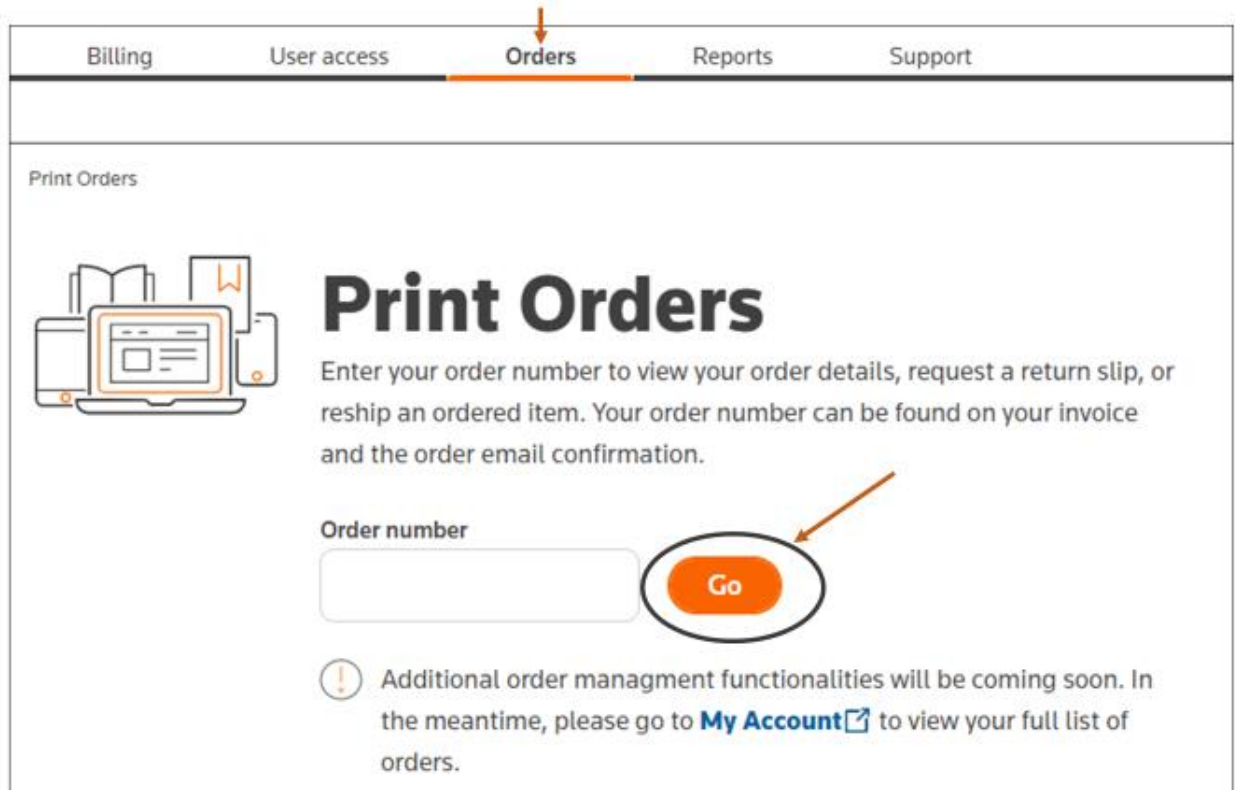
Continue [Back](#)

ORDERS

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


View Print Order

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



Billing User access **Orders** Reports Support

Print Orders



Print Orders

Enter your order number to view your order details, request a return slip, or reship an ordered item. Your order number can be found on your invoice and the order email confirmation.

Order number


Go

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

Then, view the Print Order details.

[Print Orders](#) / 0205

Order 020500000 details


Shipping and payment information

Placed on
06/19/2022

Order status
Shipped

Ship to
TESTING | ACCOUNT PAYABLE
5230 FRONT BLVD
SUNNYVALE, AZ 92618

PO Number
87

Total amount (USD)
\$599.09

Start a return

[Return policy](#)

Start a reship

1 item in your order

 Viewing 1 – 1


Rows per page
 10
 ▼

Returning Items (Start a return)

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

Print Orders / 0205

Order 020500000 details


Shipping and payment information

Placed on
06/19/2022

Ship to
TESTING | ACCOUNT PAYABLE
5230 FRONT BLVD
SUNNYVALE, AZ 92618

PO Number
87

Total amount (USD)
\$599.09

Order status
Shipped

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

[Start a reship](#)

1 item in your order

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

Viewing 1 – 1

Rows per page 10 ▼

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

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

Starting a return on order 020500000

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

1 item eligible for return in this order

Item ↓	Ordered	Returning	Reason for return
TRG CA PRACTICE ALTERNATIVE DISPUTE RESOLUTION CH6-8 2021 CONTENT	2	<div> <div>-</div> <div>0</div> <div>+</div> </div>	Select a reason ▼

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

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

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

Starting a return on order 020500000

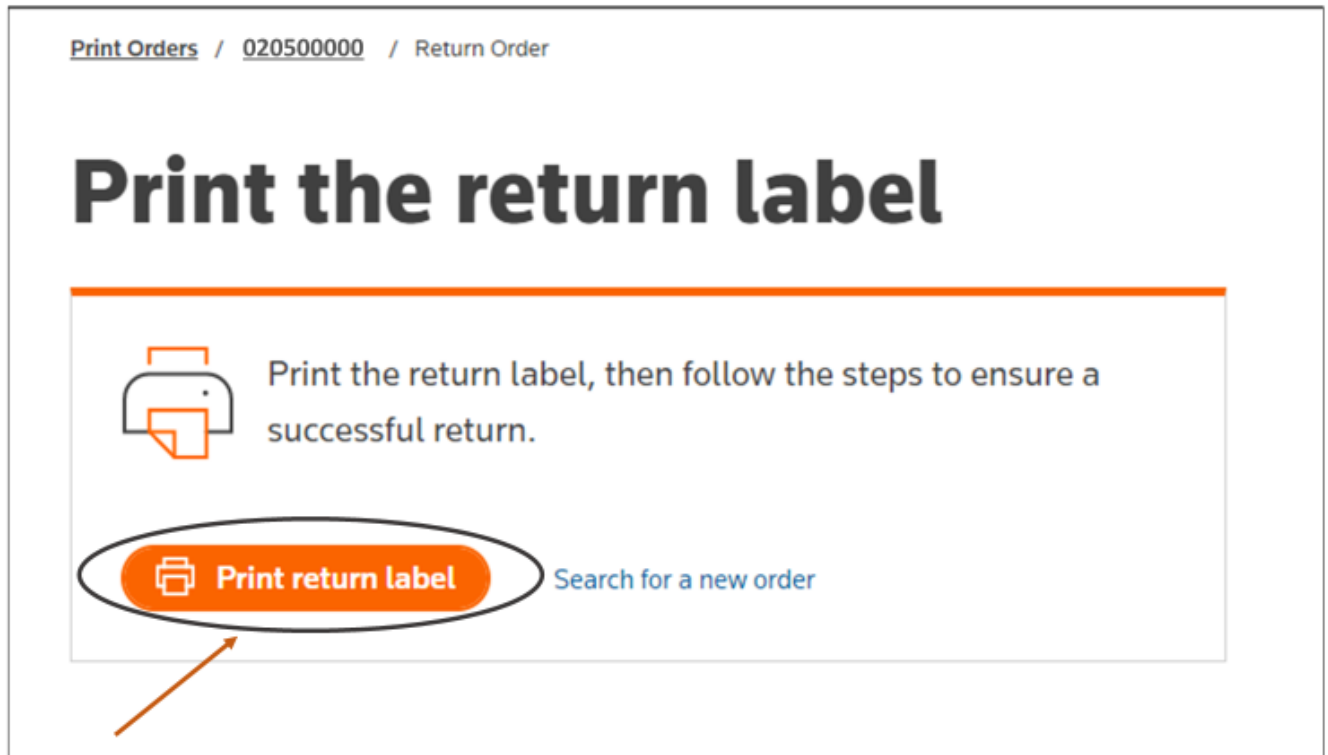
For each title you want to return, tell us how many you're sending and why.

1 item eligible for return in this order

Item ↓	Ordered	Returning	Reason for return
TRG CA PRACTICE ALTERNATIVE DISPUTE RESOLUTION CH6-8 2021 CONTENT	2	<div> <div>-</div> <div>1</div> <div>+</div> </div>	<div> <div>Select a reason</div> <div> <div>Subscription was cancelled</div> <div>Damaged in transit</div> <div>Duplicate shipment</div> <div>Not ordered</div> <div>Do not need it anymore</div> <div>Not satisfied with the product (has inaccuracies, hard to use, etc)</div> </div> </div>

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

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: 0441 West – A Thomson Reuters business Returns 100 Helpful Rd Eagan MN 55123-1310													
----- Detach here -----													
Return label Account number: 100 TESTING ACCOUNT PAYABLE 5230 FRONT BLVD SUNNYVALE, AZ 92618	 THOMSON REUTERS <i>Printed on 07/26/2022 at 2:38:57 pm</i>												
Order number: 020500000													
<table border="0" style="width: 100%;"><thead><tr><th style="text-align: left;">Delivery number</th><th style="text-align: left;">Description</th><th style="text-align: left;">Returning</th><th style="text-align: left;">Reason</th></tr></thead><tbody><tr><td colspan="4"><hr/></td></tr><tr><td>0441</td><td>TRG CA PRACTICE ALTERNATIVE DISPUTE...</td><td>1</td><td>Damaged in transit</td></tr></tbody></table>		Delivery number	Description	Returning	Reason	<hr/>				0441	TRG CA PRACTICE ALTERNATIVE DISPUTE...	1	Damaged in transit
Delivery number	Description	Returning	Reason										
<hr/>													
0441	TRG CA PRACTICE ALTERNATIVE DISPUTE...	1	Damaged in transit										

Return Policy

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

[Print Orders](#) / 0205

Order020500000 details


Shipping and payment information

Placed on
06/19/2022

Order status
Shipped

Ship to
TESTING | ACCOUNT PAYABLE
5230 FRONT BLVD
SUNNYVALE, AZ 92618

PO Number
87

Total amount (USD)
\$599.09

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

1 item in your order

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

Viewing 1 – 1

Rows per page 10 ▼

Next, view the return policy terms and conditions.

Returns: Terms and conditions

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

Timing

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

Exclusions

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

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

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

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

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

Costs

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

Packing

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

Status


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

Reshipping Items (Start a Reship Request)

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

[Print Orders](#) / 0205

Order 020500000 details

 Shipping and payment information

Placed on
06/19/2022

Order status
Shipped

Ship to
TESTING | ACCOUNT PAYABLE
5230 FRONT BLVD
SUNNYVALE, AZ 92618

PO Number
87
Total amount (USD)
\$599.09

[Start a return](#)

[Return policy](#)

[Start a reship](#)

1 item in your order

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

Viewing 1 – 1

Rows per page 10 ▼

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

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

Start a reship request for order 020500000

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

1 item eligible for reshipment

Item ↓	Ordered	Reshipping	Reason for reship
TRG CA PRACTICE ALTERNATIVE DISPUTE RESOLUTION CH6-8 2021 CONTENT	2	<div>– 0 +</div>	Select a reason ▼

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

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

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

Start a reship request for order 020500000

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

1 item eligible for reshipment


Item ↓	Ordered	Reshipping	Reason for reship
TRG CA PRACTICE ALTERNATIVE DISPUTE RESOLUTION CH6-8 2021 CONTENT	2	<div> <div>-</div> <div>1</div> <div>+</div> </div>	<div> <div>Select a reason</div> <div> <div>Lost shipment</div> <div>Damage</div> <div>Defective</div> <div>Wrong product sent</div> </div> </div>

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

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

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

Review reship request for order 020500000


 **Original order:** 020500000

Ship To
 TESTING ACCOUNT
 PAYABLE
 5230 FRONT BLVD
 SUNNYVALE, AZ 92618
[Edit address](#)

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

Item(s) to be reshipped


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

 [Back](#)

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

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

Reship requested for order 020500000



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

Confirmation: **000356714326**


[Go back to all orders](#)

Remove an Item

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

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

Review reship request for order 020500000

 **Original order:** 020500000

Ship To
 TESTING ACCOUNT
 PAYABLE
 5230 FRONT BLVD
 SUNNYVALE, AZ 92618
[Edit address](#)

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

Item(s) to be reshipped		Reshipping	Reason for reship	Remove an item
Item ↓				
TRG CA PRACTICE ALTERNATIVE DISPUTE RESOLUTION CH6-8 2021 CONTENT	1		Damage	X Remove


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

Edit Shipping Address

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

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

Review reship request for order 020500000

 **Original order:** 020500000

Ship To
 TESTING ACCOUNT
 PAYABLE
 5230 FRONT BLVD
 SUNNYVALE, AZ 92618
[Edit address](#)

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

Item(s) to be reshipped

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

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

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

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

Edit shipping address for reship

Original order: 020500000

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

Enter new address


<p>Name line 1</p> <input type="text" value="TESTING"/>	<p>Name line 2 (optional)</p> <input type="text" value="ACCOUNT PAYABLE"/>
<p>Address line 1</p> <input type="text" value="5230 FRONT BLVD"/>	<p>Address line 2 (optional)</p> <input type="text"/>
<p>Country</p> <input type="text" value="United States"/>	<p>State/province</p> <input type="text" value="Arizona"/>
<p>Zip/Postal</p> <input type="text" value="92618"/>	<p>City</p> <input type="text" value="SUNNYVALE"/>

Change Shipping Method

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

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

Review reship request for order 020500000

 **Original order:** 020500000

Ship To
 TESTING ACCOUNT
 PAYABLE
 5230 FRONT BLVD
 SUNNYVALE, AZ 92618
[Edit address](#)

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

Item(s) to be reshipped

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

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

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

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

Edit shipping method for reship

Original order: **020500000**

Select a shipping method

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

Shipping method

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

Shipping carrier account number

Enter account number

Then, click **Save and continue**.

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

Edit shipping method for reship

Original order: **020500000**

Select a shipping method

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

Shipping method

U.S. ground service (free) ▼

Shipping carrier account number

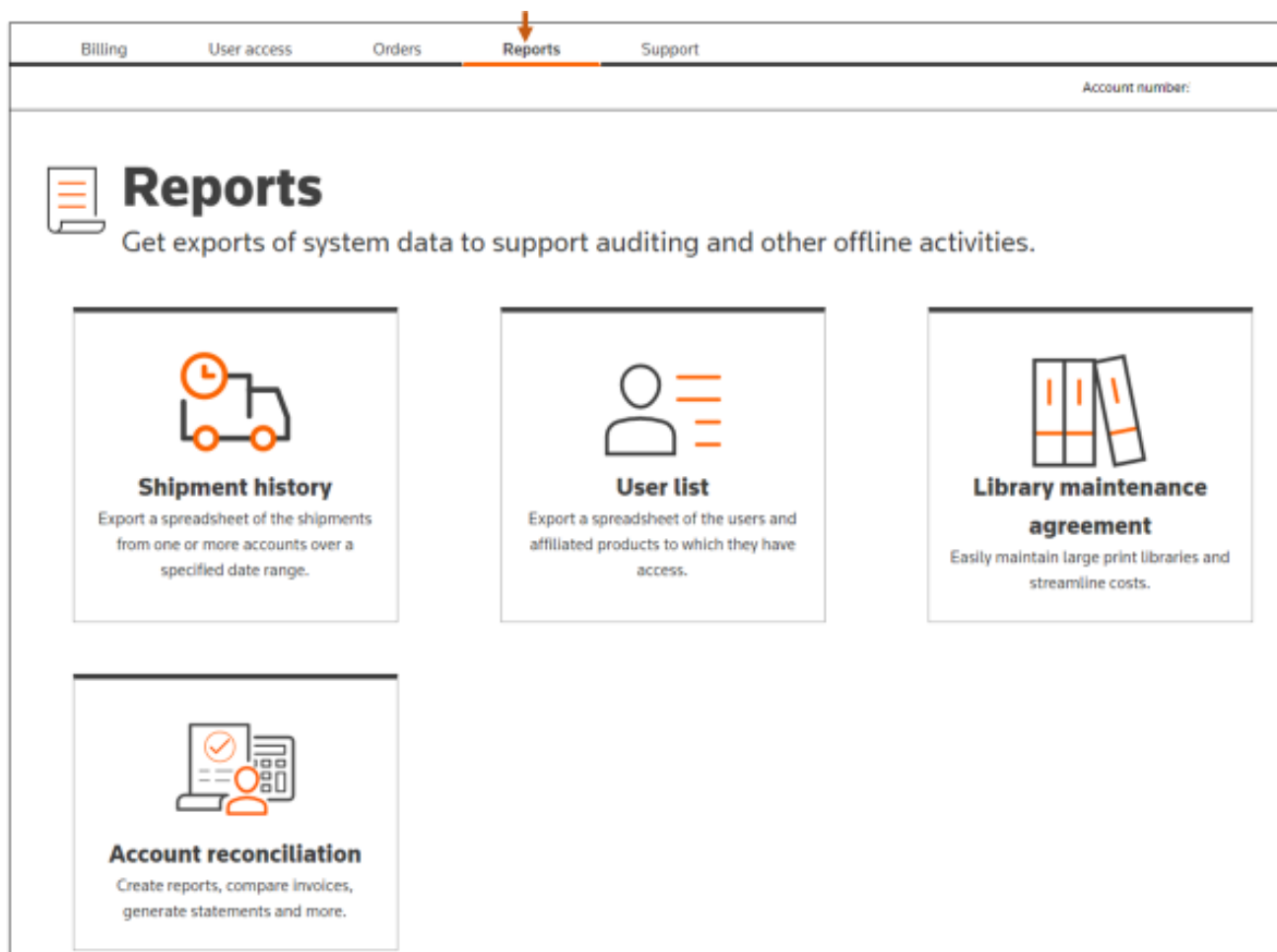
Enter account number

Save and continue Cancel

REPORTS

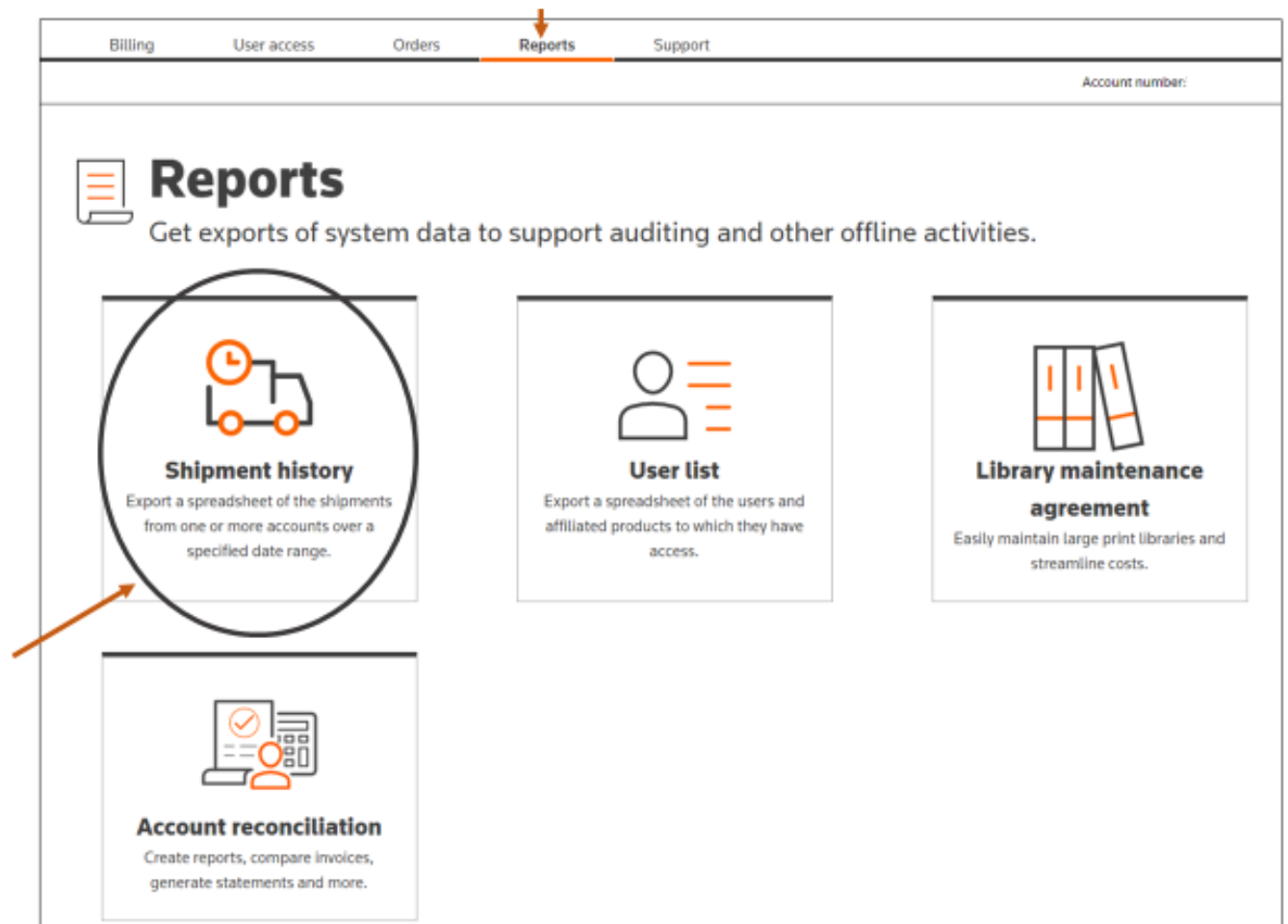
We anticipate that the reports shown in this section will be available in 2024.

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




Shipping History Report

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




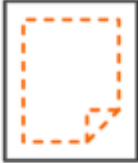
A list of previously created shipping reports will appear in a chart. If no prior shipping history report exists, you will see a message similar to the one below.



Shipment history reports

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

Create a report 




There are no shipment history reports for this account yet.

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

To get started, select Create a report.


Create a Shipping History Report


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

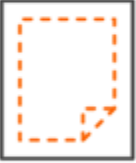


Shipment history reports

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

Create a report






There are no shipment history reports for this account yet.

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

To get started, select Create a report.

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

Create a shipment history report

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

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

Include shipment dates from:

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

Repeat monthly toggle: ☒ Repeat monthly

Continue to select accounts

The screenshot shows a form titled "Create a shipment history report". Below the title is a instruction: "First, select the date range that the report should cover." followed by a "Report name (Optional)" field with the prompt "Give the report a unique name." and an empty text box. Under "Include shipment dates from:", there are three radio button options: "Previous calendar month" (selected), "Previous 90 days", and "Custom date range". To the right of these is a "Repeat monthly" toggle switch, which is currently turned on (green with a checkmark). At the bottom, there is an orange button labeled "Continue to select accounts". Orange arrows point from the "Previous calendar month" radio button, the "Repeat monthly" toggle, and the "Continue to select accounts" button. The "Continue to select accounts" button is circled in black.

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

Create a shipment history report

Next, select the accounts to pull shipments from.

Available accounts list

☒ 1 of 1 selected ▼ Search

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

Viewing 1 - 1 Rows per page 10 ▼

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

Review your shipment history report

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


Report name **Test1** [Edit](#) Date range **Last calendar month (From May 02, 2022 to Jun 01, 2022)** [Edit](#)

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

Save and run report [Cancel](#)

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

We're running your report




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

[Back to shipment history reports](#)

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

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

Account number:



Shipment history reports

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

[Create a report](#)

Available and pending reports

Report name	Created on	Duration	Status	
Test1		Monthly	Pending	⋮

Viewing 1 – 1

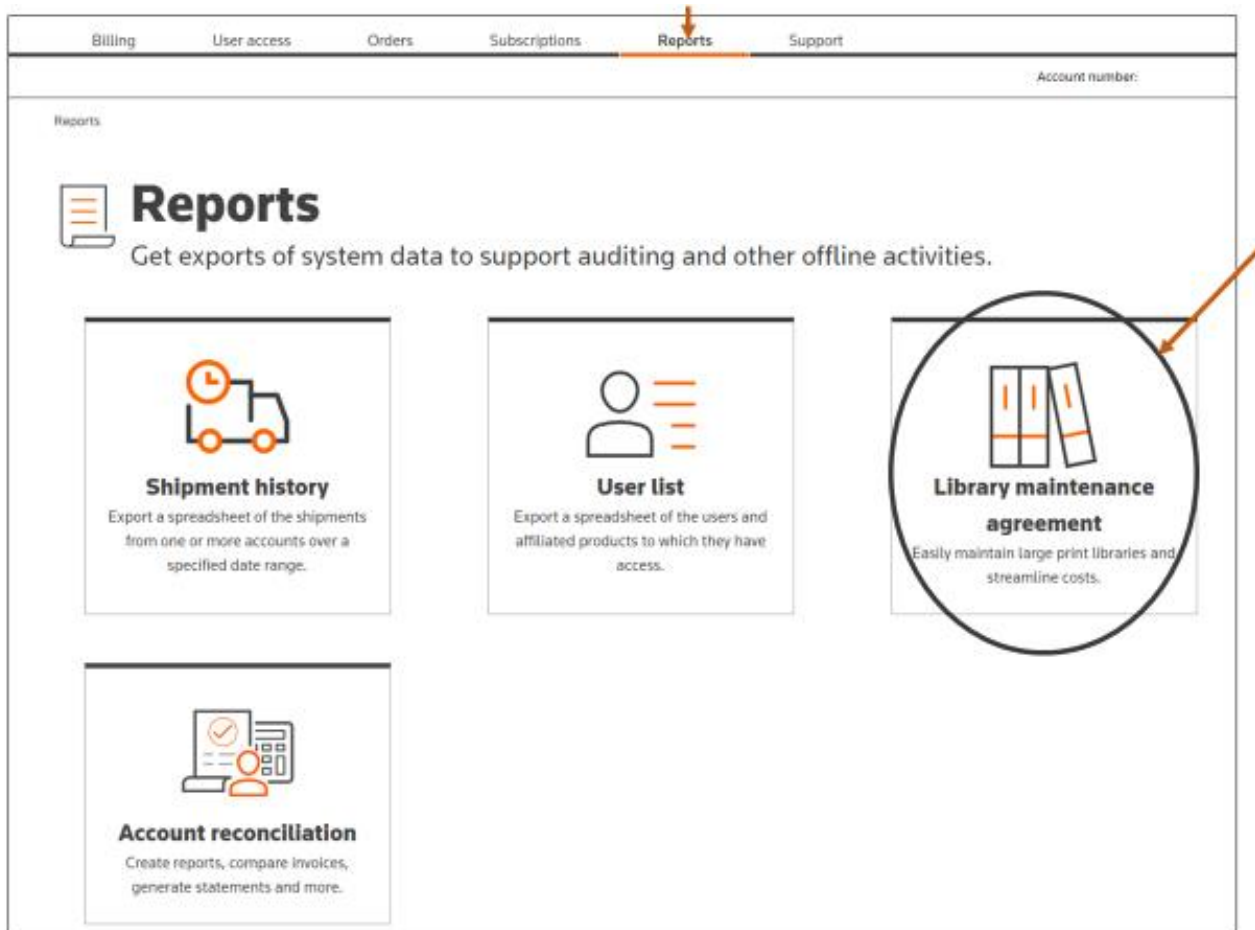
Rows per page 10

User List Report

See section View users: Get a Report of Users.


Library Maintenance Agreements

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




Then, click **Download the report**.

Reports / Library Maintenance Agreement



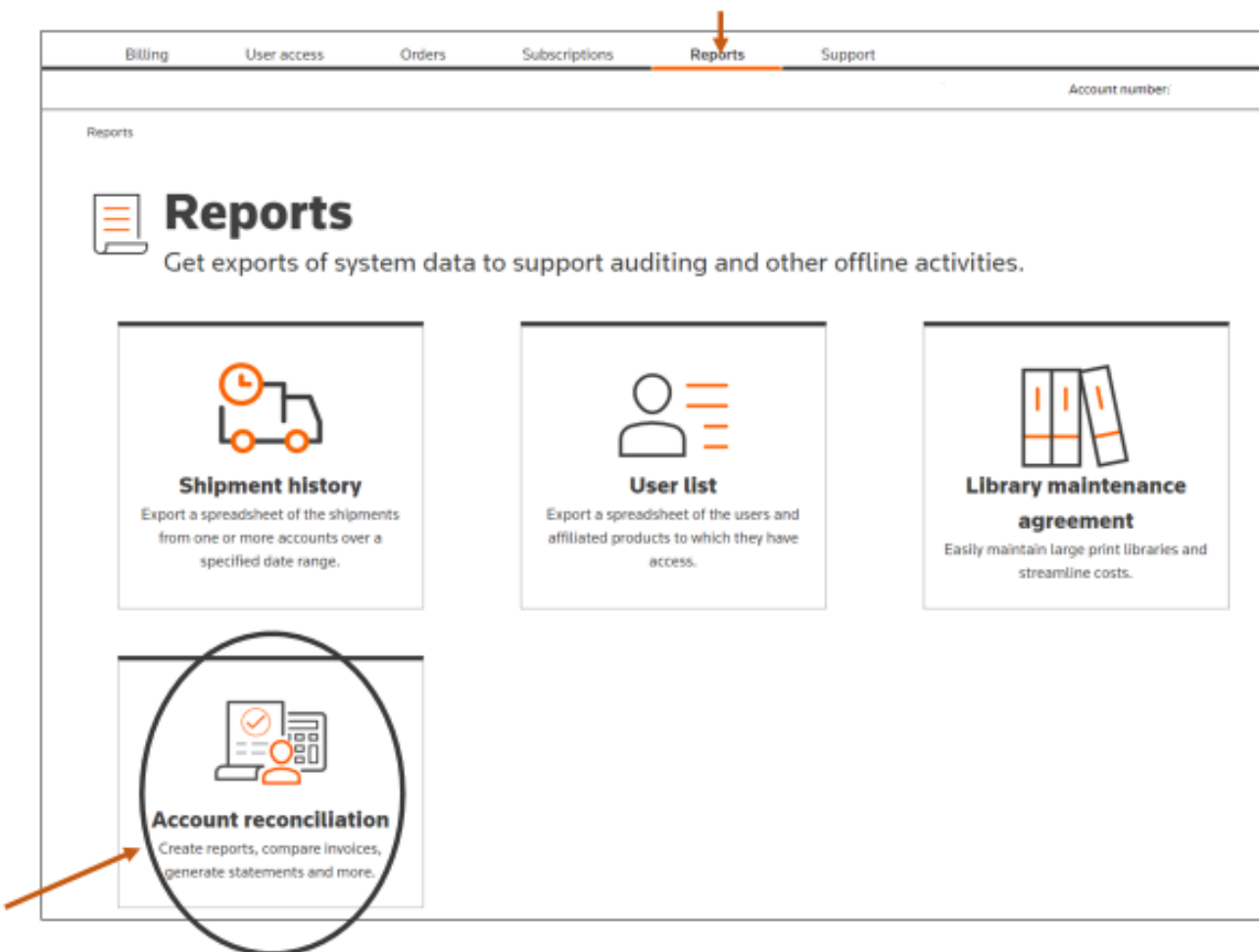
Library Maintenance Agreement (LMA)

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

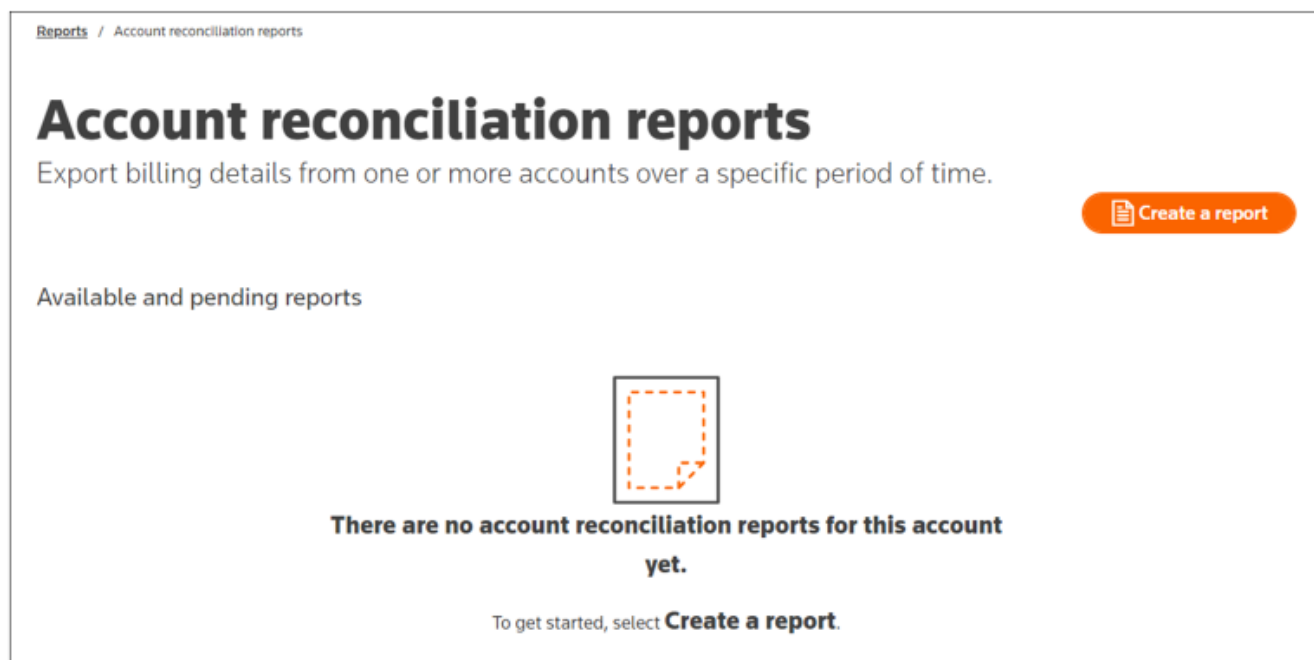


Account Reconciliation Report

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

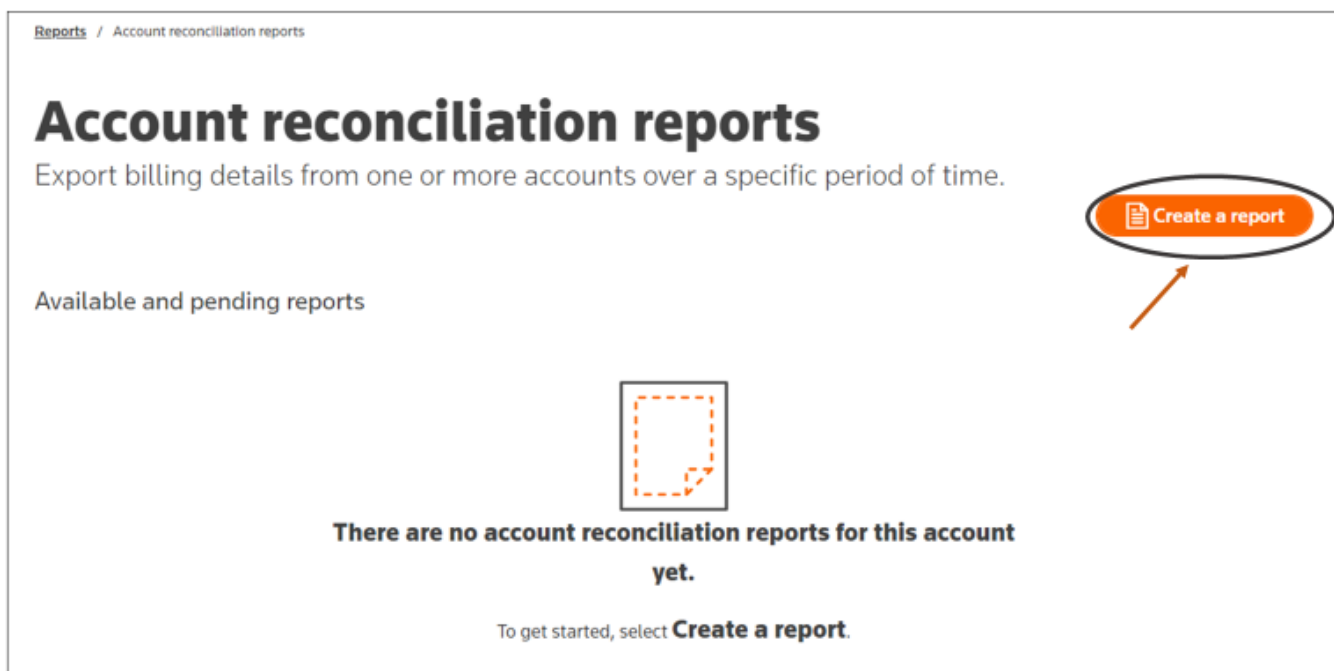


A list of previously created account reconciliation reports will appear in a chart. If no prior account reconciliation report exists, you will see a message similar to the one below.



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**.

The screenshot shows the 'Create a reconciliation report' form. At the top, the breadcrumb trail reads 'Reports / Account reconciliation reports / Create a reconciliation report'. The main heading is 'Create a reconciliation report'. Below it, a calendar icon is followed by the instruction 'First, fill out the report details.'.

The 'Report name (Optional)' section asks the user to 'Give the report a unique name.' and features a text input field.

The 'Include shipment dates from:' section contains three radio button options: 'Last calendar month', 'Last 90 days', and 'Custom date range'. The 'Last calendar month' option is selected.

Next to the 'Last calendar month' option is a toggle switch labeled 'Repeat monthly'. An orange arrow points from this toggle to a callout box. The callout box shows the 'Repeat monthly' toggle in its 'on' state, which is green and has a white checkmark.

At the bottom of the form, there are two buttons: 'Continue to select accounts' (highlighted with an orange oval and an orange arrow) and 'Cancel'.

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

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

Select accounts

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

Available accounts list

☒ 1 of 1 selected

Search Account, name, address

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

Viewing 1 - 1

Rows per page 10

Review report Cancel

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

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

Review report details

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

Report name **Test** [Edit](#)

Duration **Last calendar month** [Edit](#)

Recurring **No** [Edit](#)

Selected accounts [Edit](#)


100
**TEST FOR
TESTING ONLY

Save and run report Cancel

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

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

We're running your report



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

[Back to reports](#)

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

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

Account reconciliation reports

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

[Create a report](#)

Available and pending reports

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

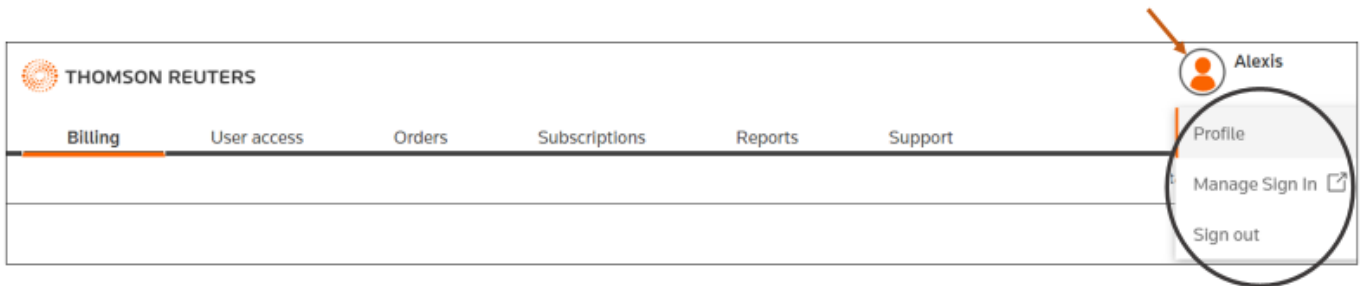
Viewing 1 – 1

Rows per page 10 ▾

MANAGE YOUR PROFILE

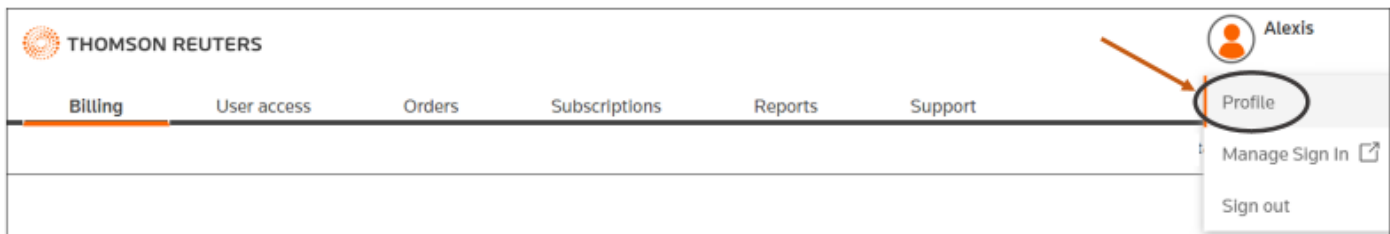
View Profile, Manage Sign In or Sign Out

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



Profile

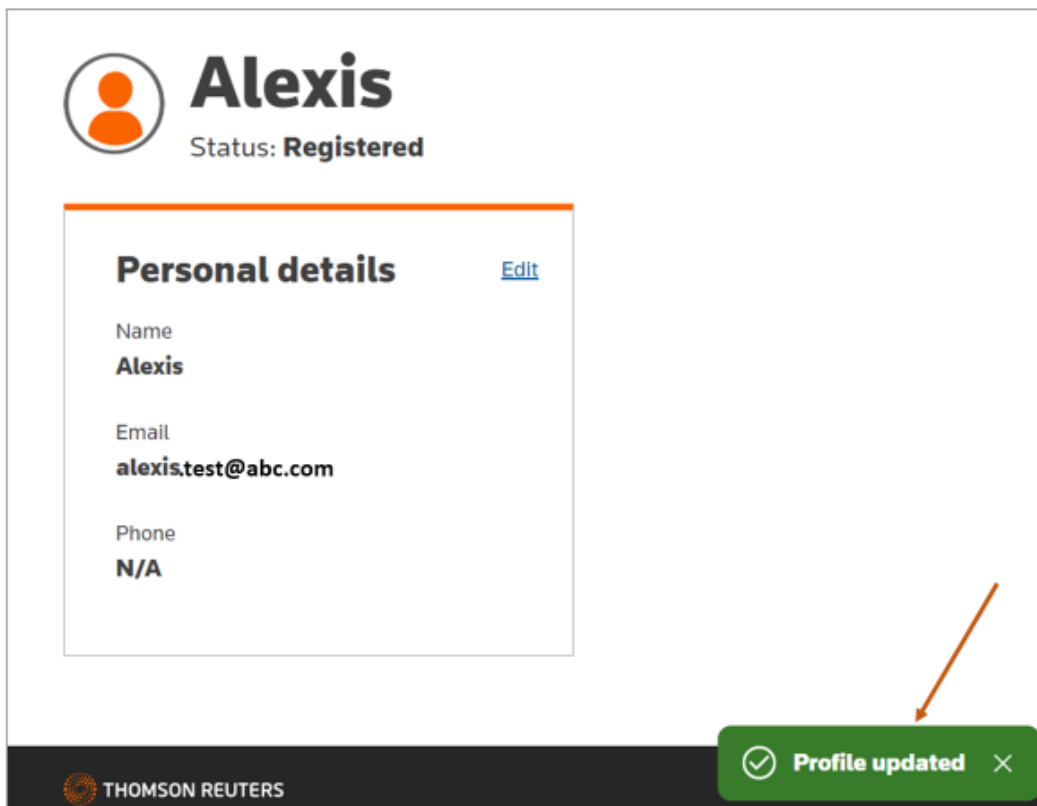
Click **Profile** from the icon on the top right-hand side next to your name.



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



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

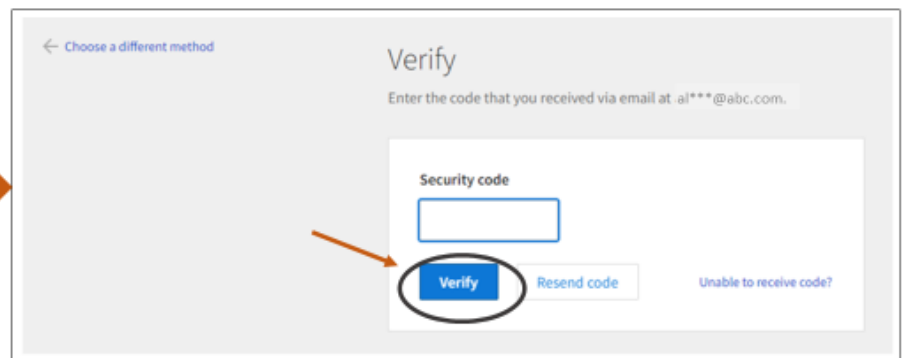
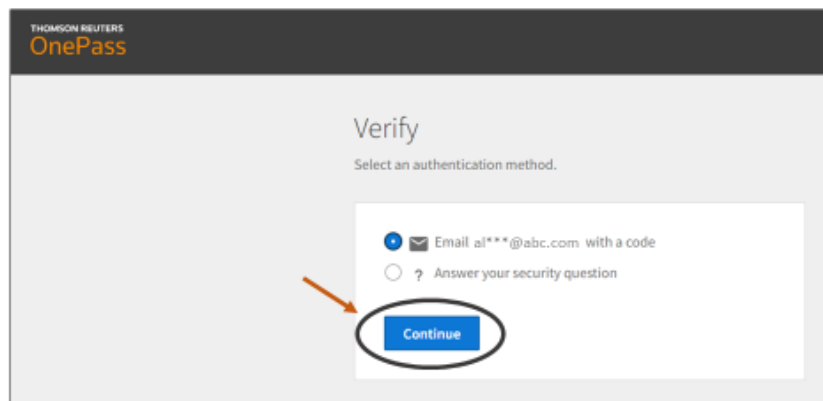


Manage Sign In

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

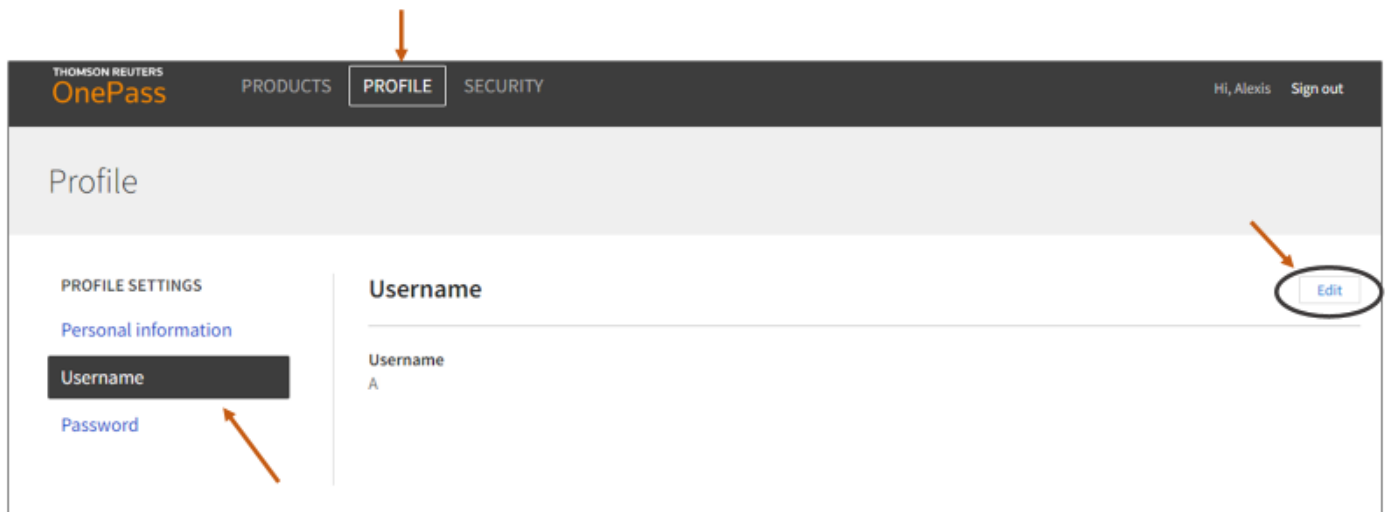
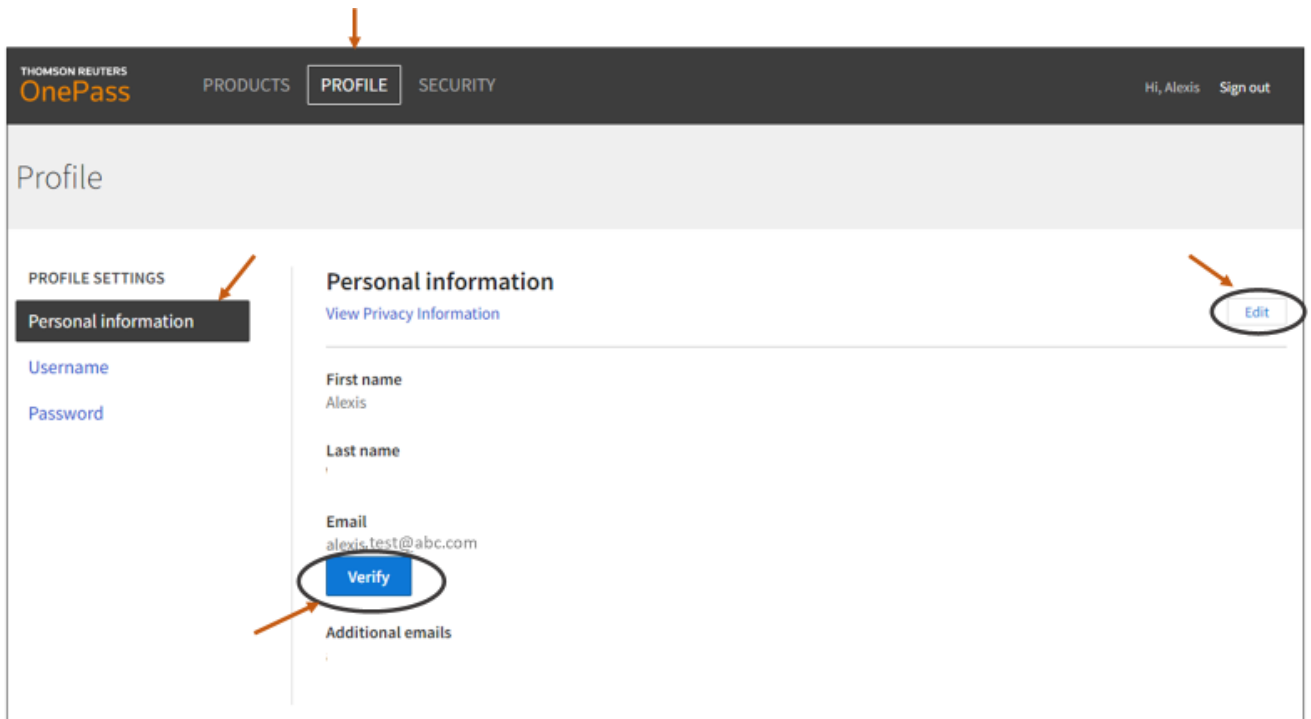


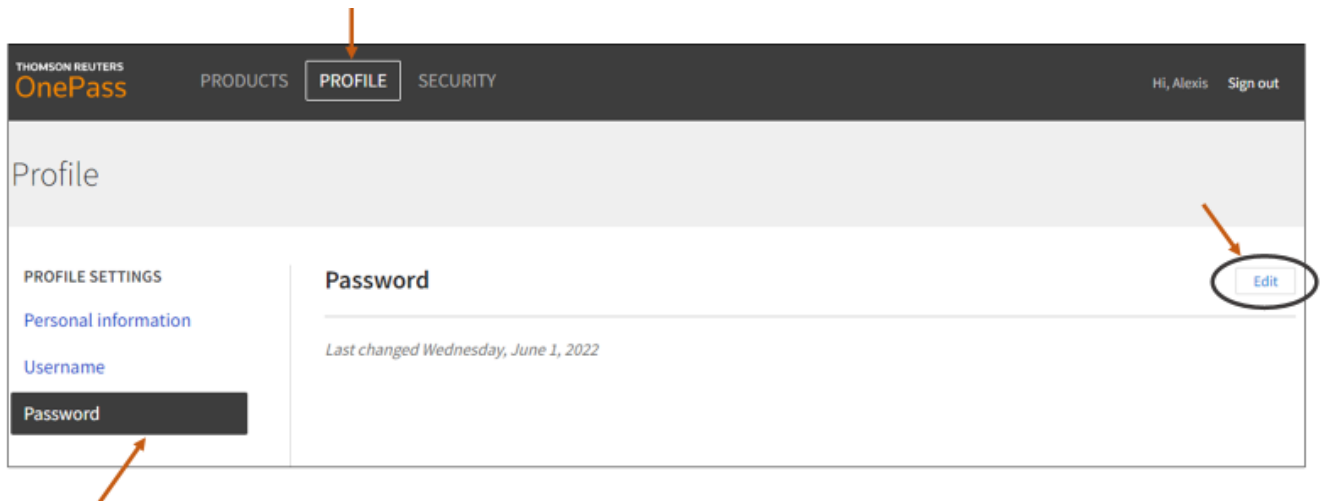
Next, follow the prompts to verify your identity.



OnePass PROFILE

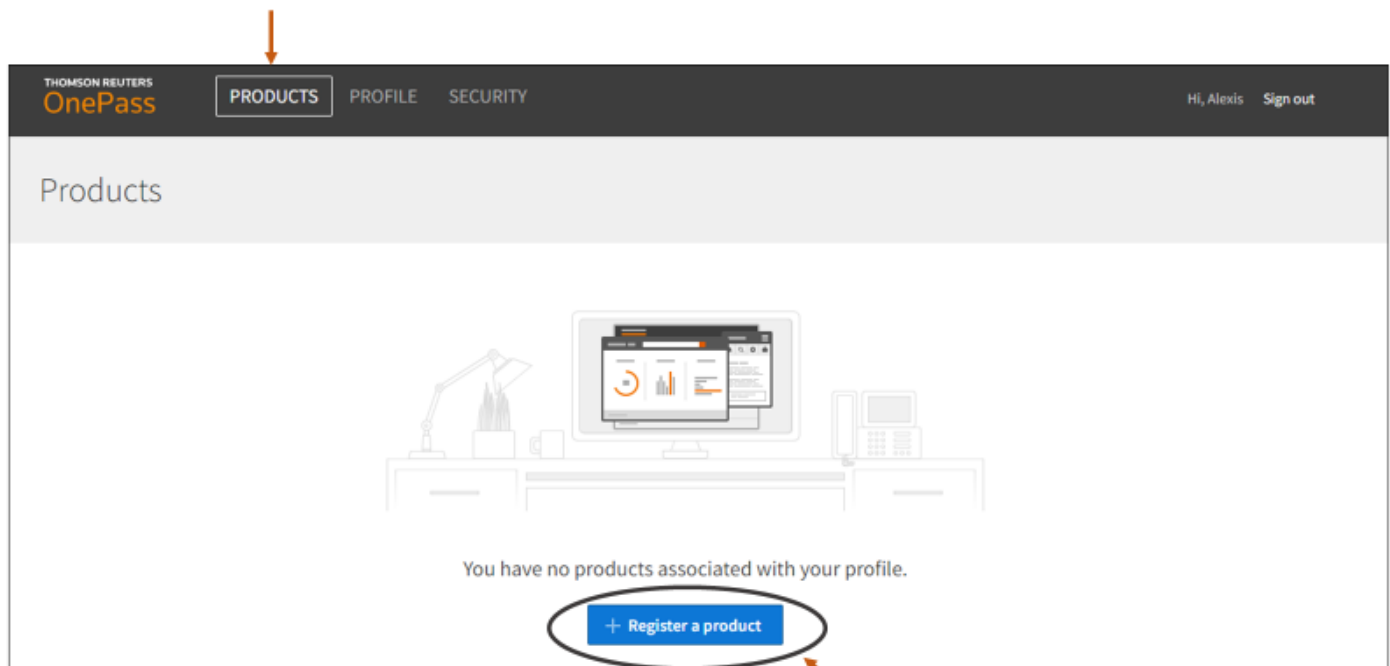
Navigate to **PROFILE** to view and edit your **Personal information**, **Username** or **Password** (see illustrations below).





OnePass PRODUCTS

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

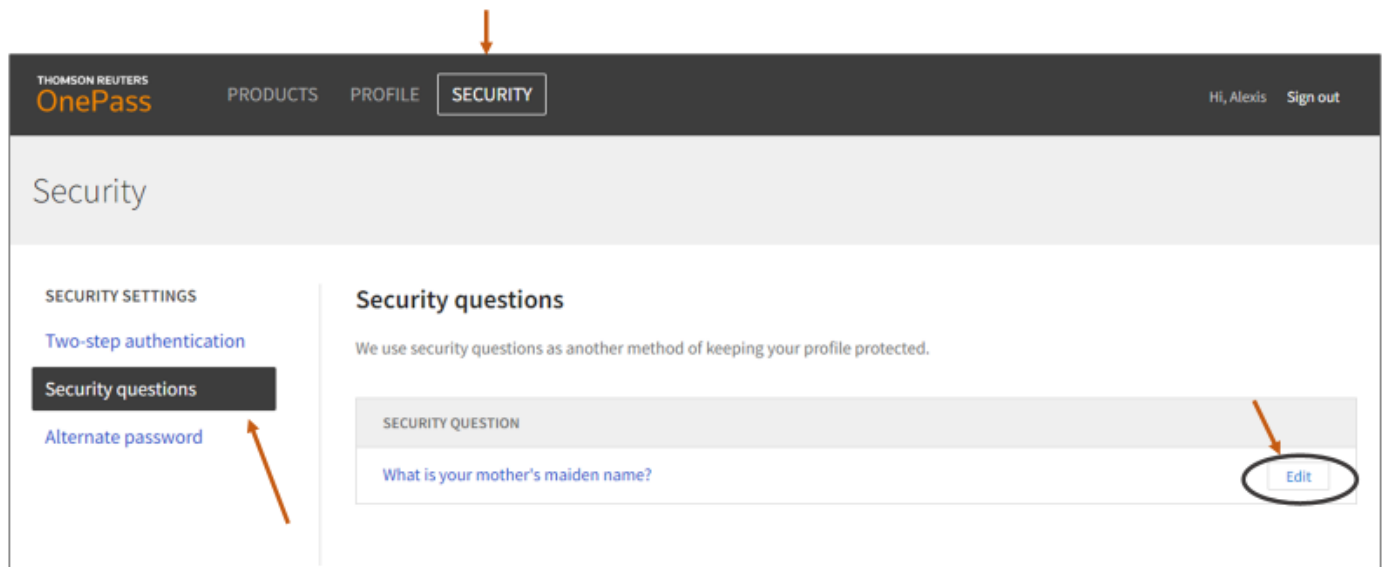
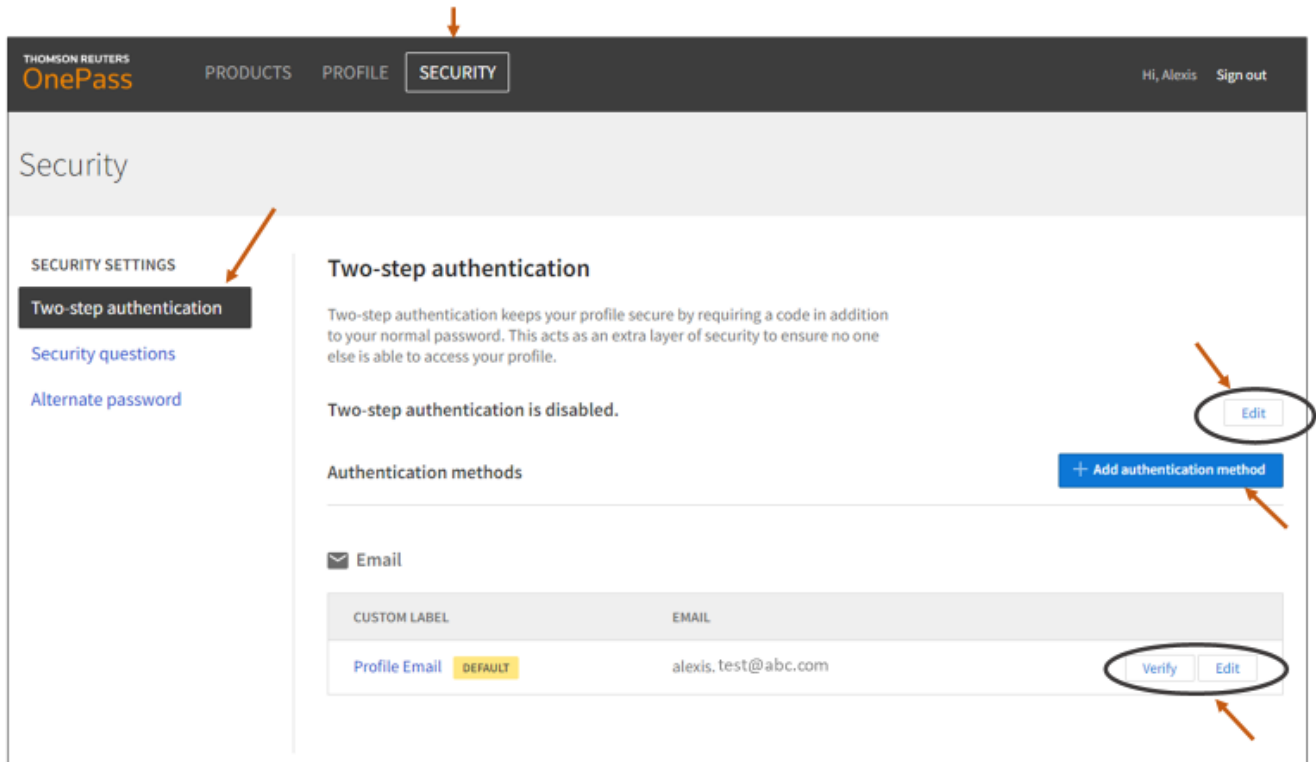


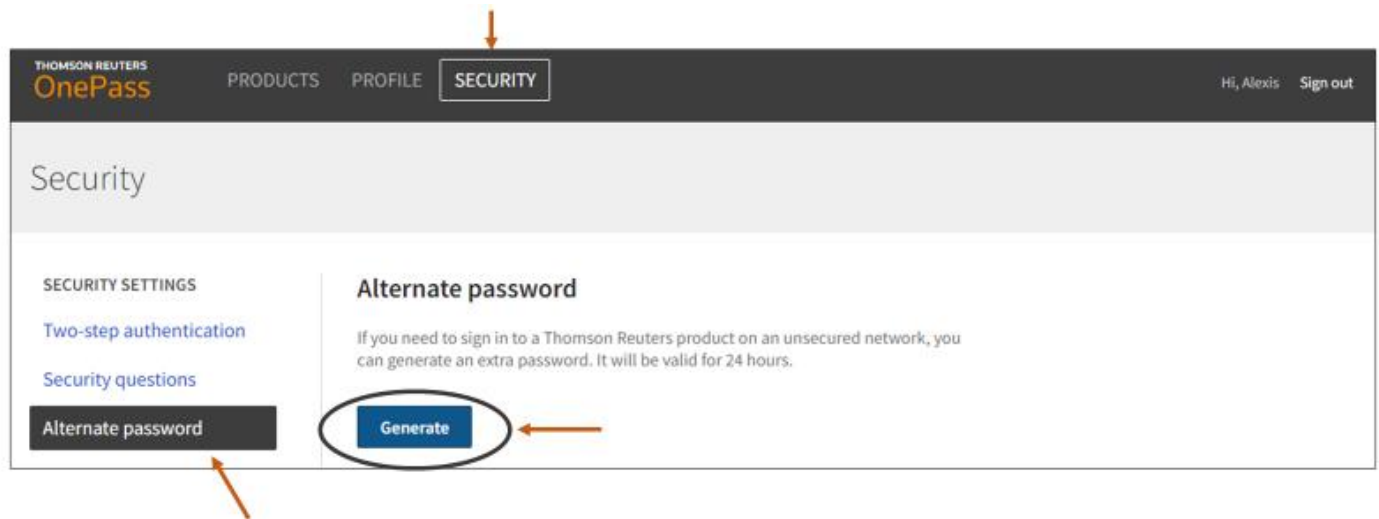
Next, click on the carrot under Product and select the **Product** you want to register. Then, provide the **Registration key** and if desired a **Custom label**. Then, click **Save**.

The screenshot shows the 'Register a product' form. The title is 'Register a product' with the subtitle 'Add a new product registration key to your OnePass profile.' The form contains three input fields: 'Product' (a dropdown menu with 'Select a product' and a downward arrow), 'Registration key' (a text input field), and 'Custom label' (a text input field with the subtitle 'Give this registration key a label to differentiate it from others.'). At the bottom of the form, there are two buttons: 'Save' and 'Cancel'. An orange arrow points to the dropdown arrow of the 'Product' field, and another orange arrow points to the 'Save' button.

OnePass SECURITY

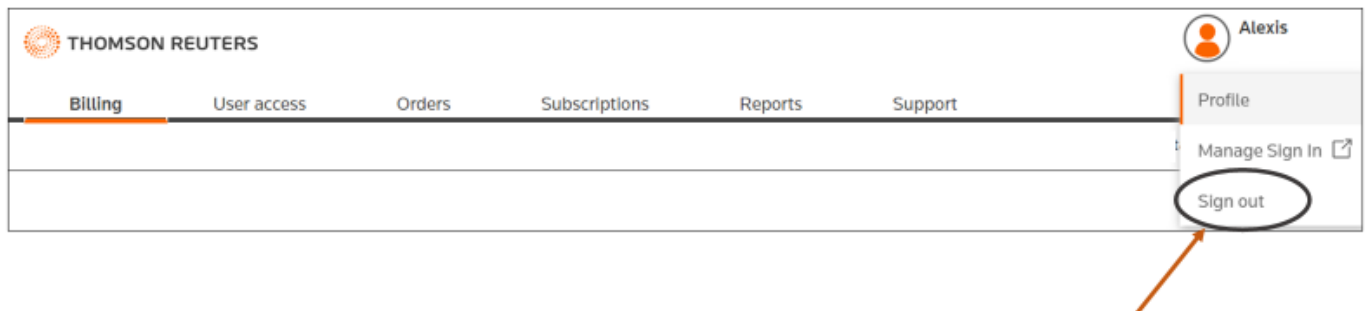
Navigate to SECURITY to change your security settings, including: 1) setting up **Two-step authentication**, 2) **Security questions**, and 3) creating an **Alternate password** (see illustrations below).





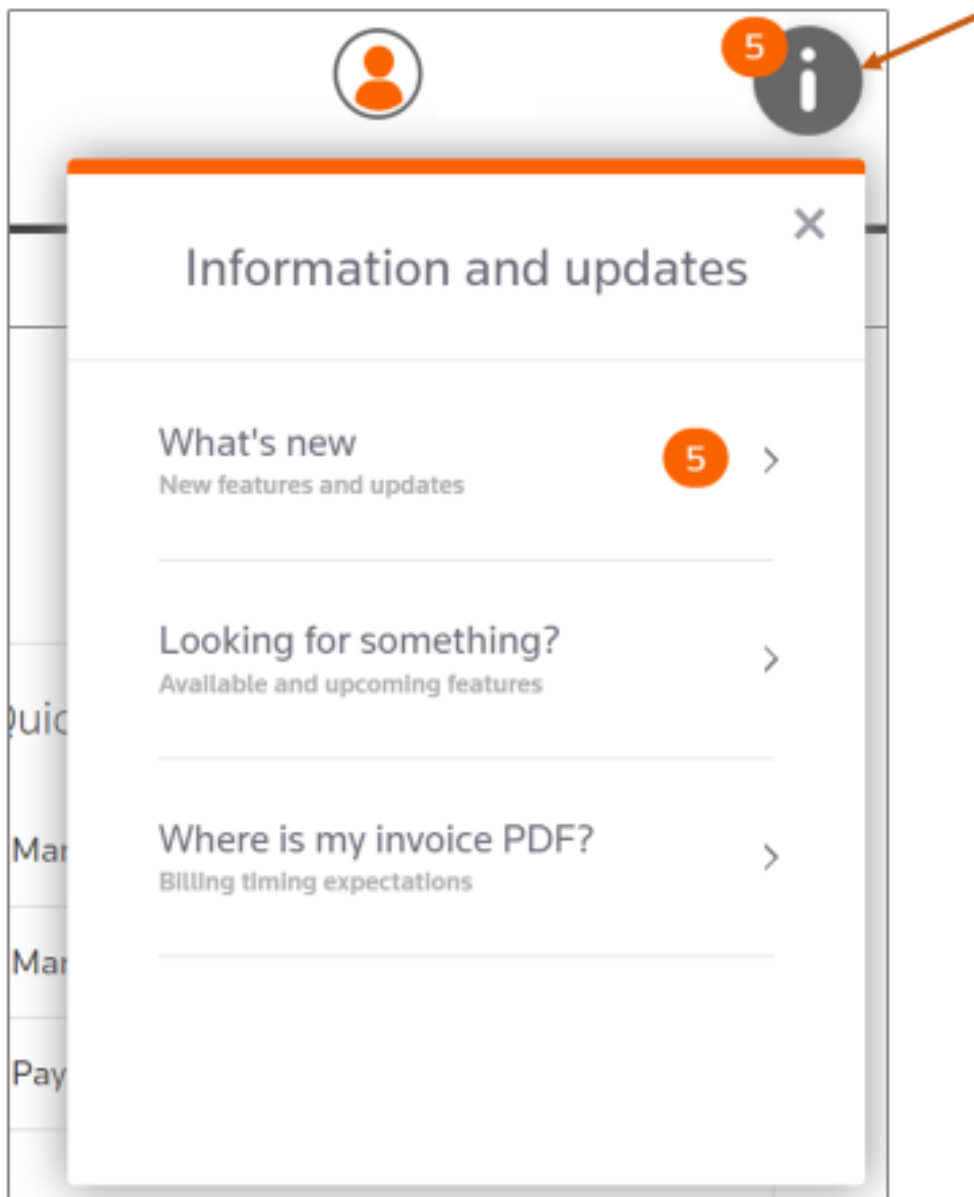
Sign-out

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



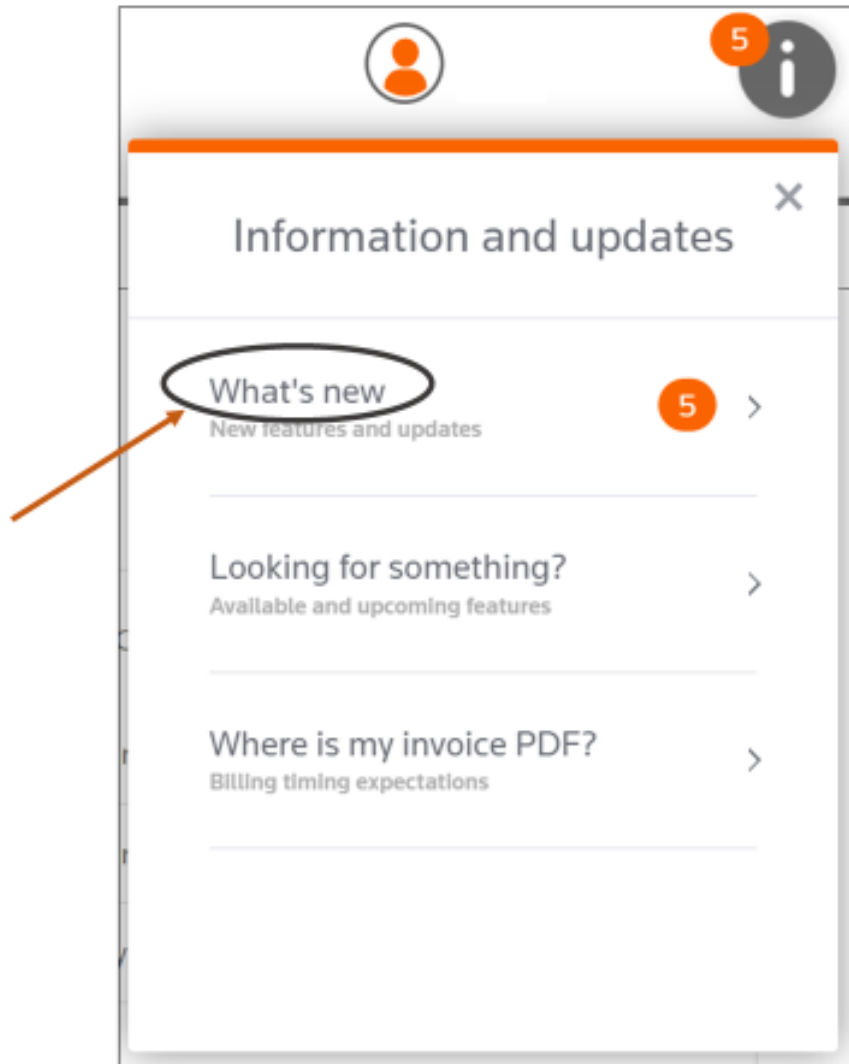
INFORMATION AND UPDATES

Click on the ⓘ on the top right side.



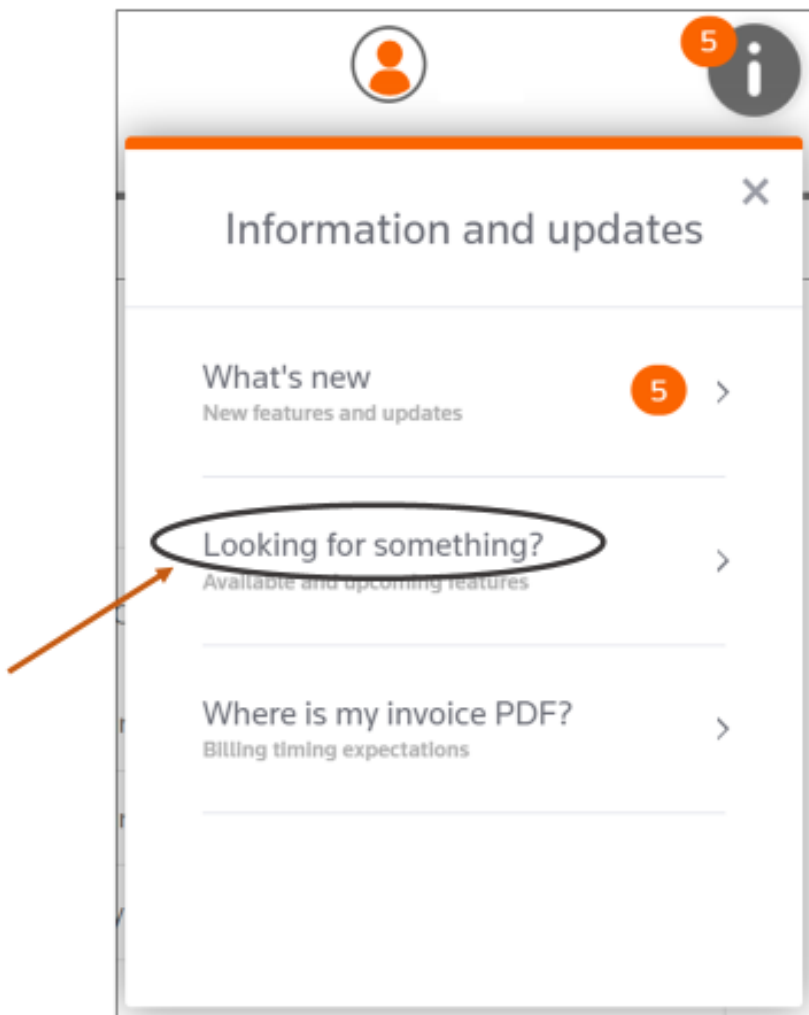
What's new

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

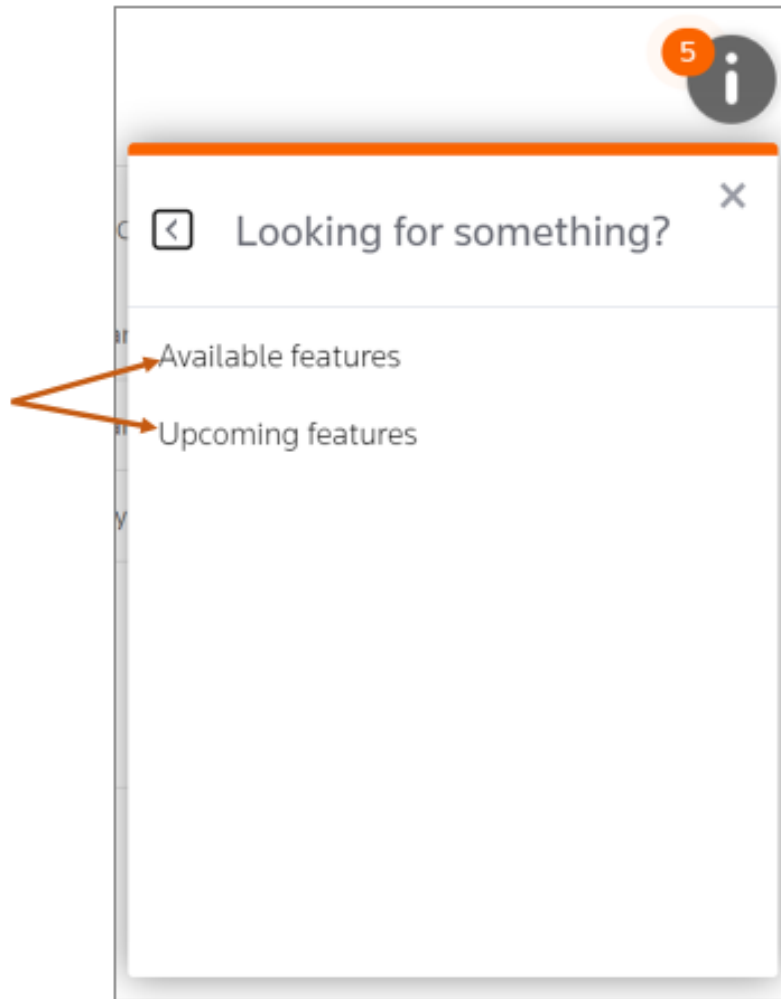


Looking for something?

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



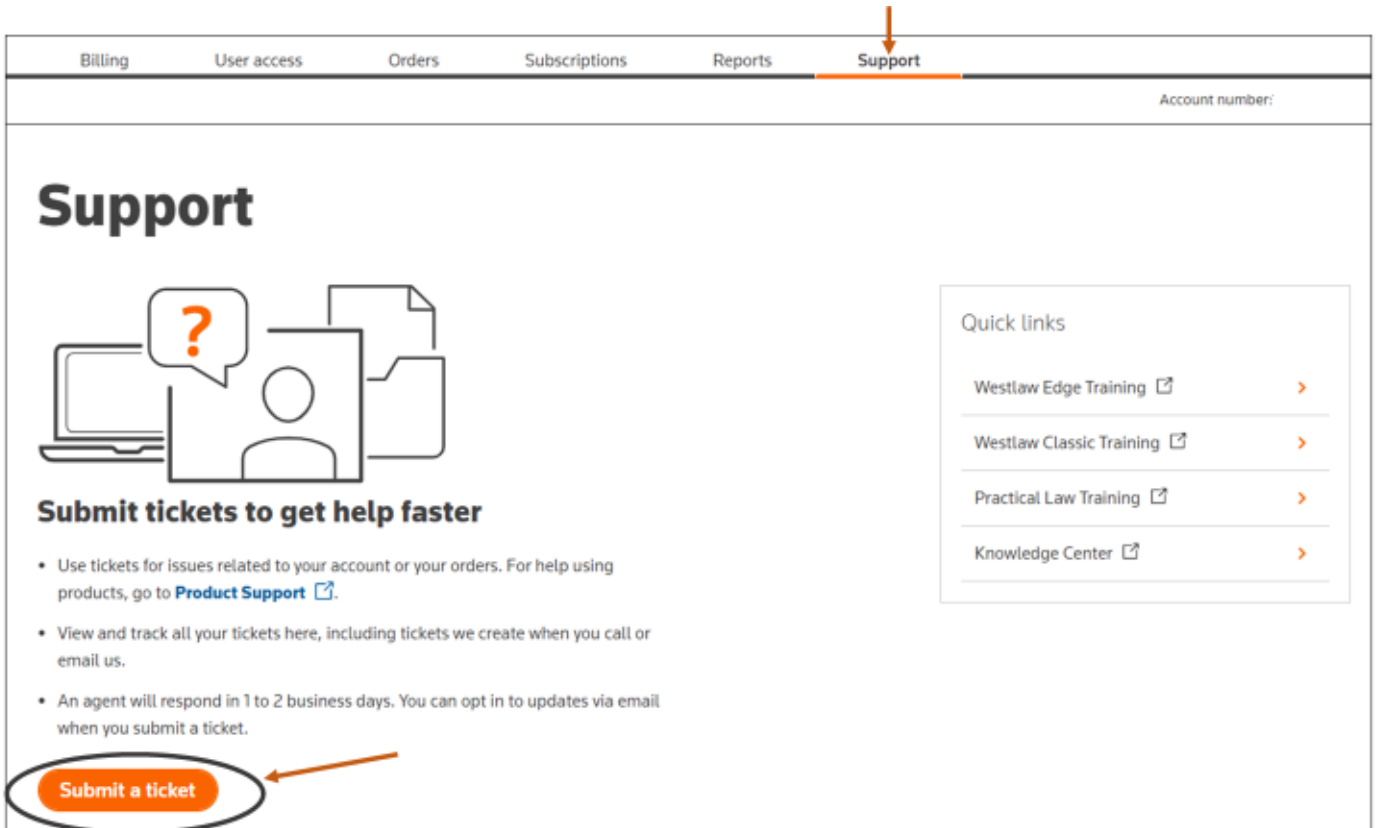
Next click either **Available features** or **Upcoming features**.



SUPPORT

Submit a Ticket

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



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

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

Submit a ticket [Cancel and return to support](#)

- What can we help you with?**

Topic

☐ Account support
 ☐ User and admin access

Next
- Which area can we help you with?**
- What's the main reason for submitting this ticket?**
- Tell us a little more.**

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

Submit a ticket

[Cancel and return to support](#)

1

What can we help you with?

User and admin access

2

Which area can we help you with?

Category

☒ Manage account users
 ☐ Manage account admins

☐ Manage product users
 ☐ Account passwords

☐ Product passwords

Next

Back

3

What's the main reason for submitting this ticket?

4

Tell us a little more.

Submit a ticket

[Cancel and return to support](#)

1

What can we help you with?

User and admin access

2

Which area can we help you with?

Manage account users

3

What's the main reason for submitting this ticket?

Reason

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

☐ I need to transfer a user to another account.

Next

Back

4

Tell us a little more.

Submit a ticket

Cancel and return to support

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

More details

Phone

Ticket subject

Email

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

Ticket description

Attach files to your message (Optional)

Drop files to upload

Choose files

7 MB limit per upload

Submit **Back**

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

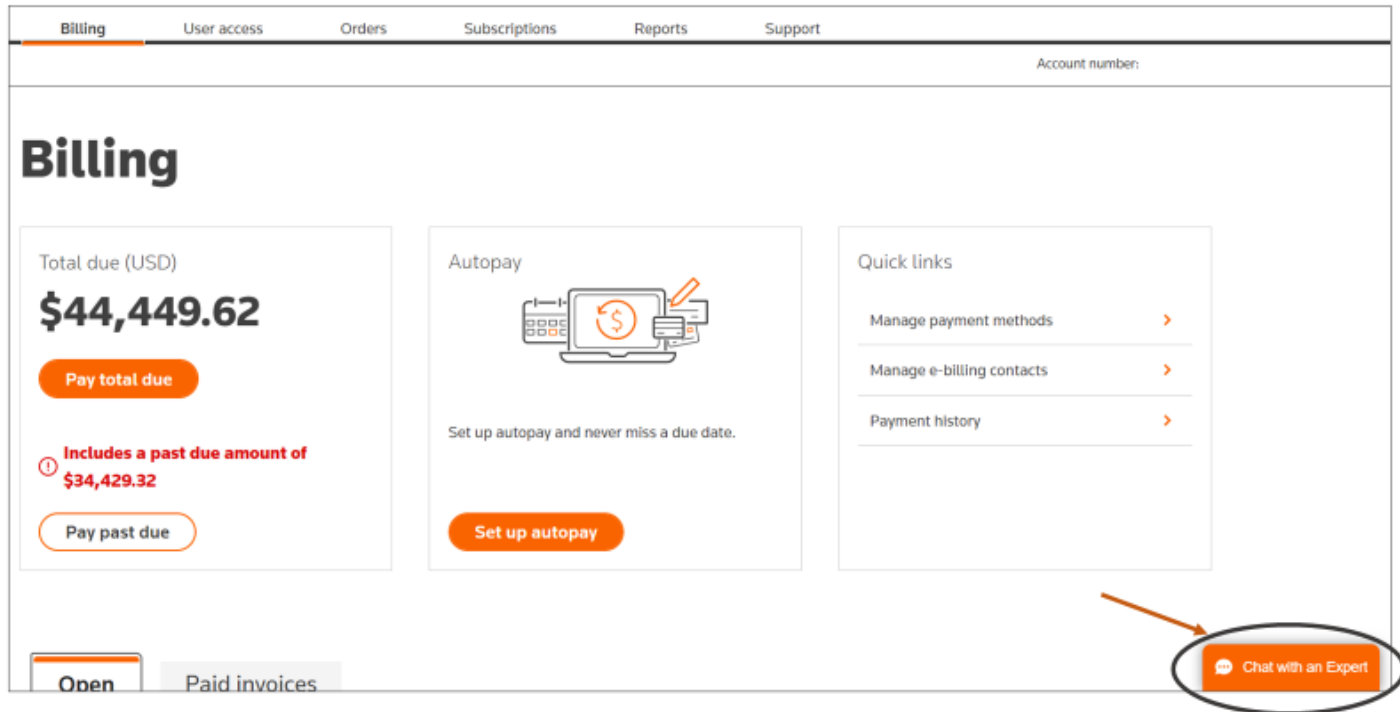
The screenshot shows the 'Submit a ticket' form with the following sections and annotations:

- Form Sections:**
 - 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)
- Input Fields:**
 - Phone:** Enter your phone number
 - Ticket subject:** Enter a short subject line that will help you identify this ticket
 - Email:** (Empty field)
 - Ticket description:** Share specific details so we can better assist you
- Notification Option:**
 - ☐ Receive email notifications when an agent comments on your ticket. (Optional)
- File Upload:**
 - Attach files to your message (Optional)
 - Drop files to upload
 - Choose files
 - 7 MB limit per upload
- Buttons:**
 - Submit:** (Highlighted with an orange circle and an arrow pointing to it from the bottom left)
 - Back:** (Next to the Submit button)

Orange arrows indicate the path from the notification checkbox to the Submit button, and another arrow points to the checkbox itself from the right side of the form.

Live Chat

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



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

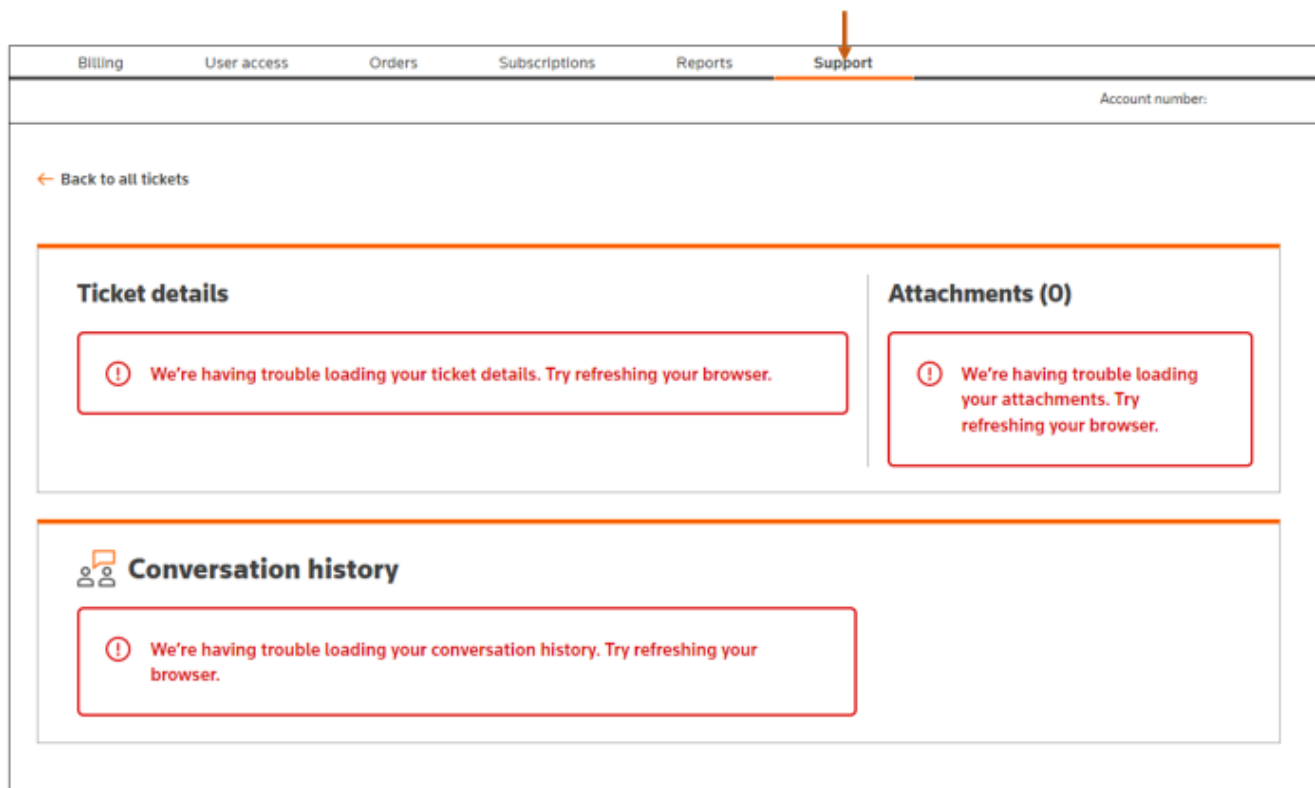
TROUBLESHOOTING & FAQs

Credit Card Error

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

Error Displaying Support Data

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



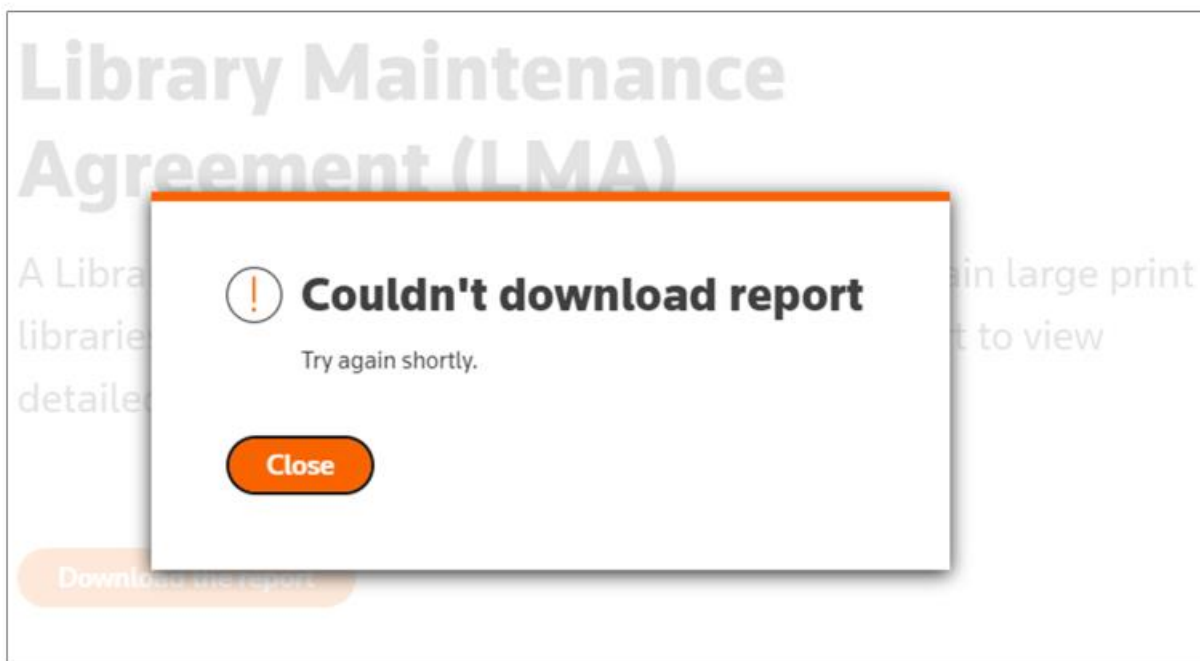
Failure to Download Invoice

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



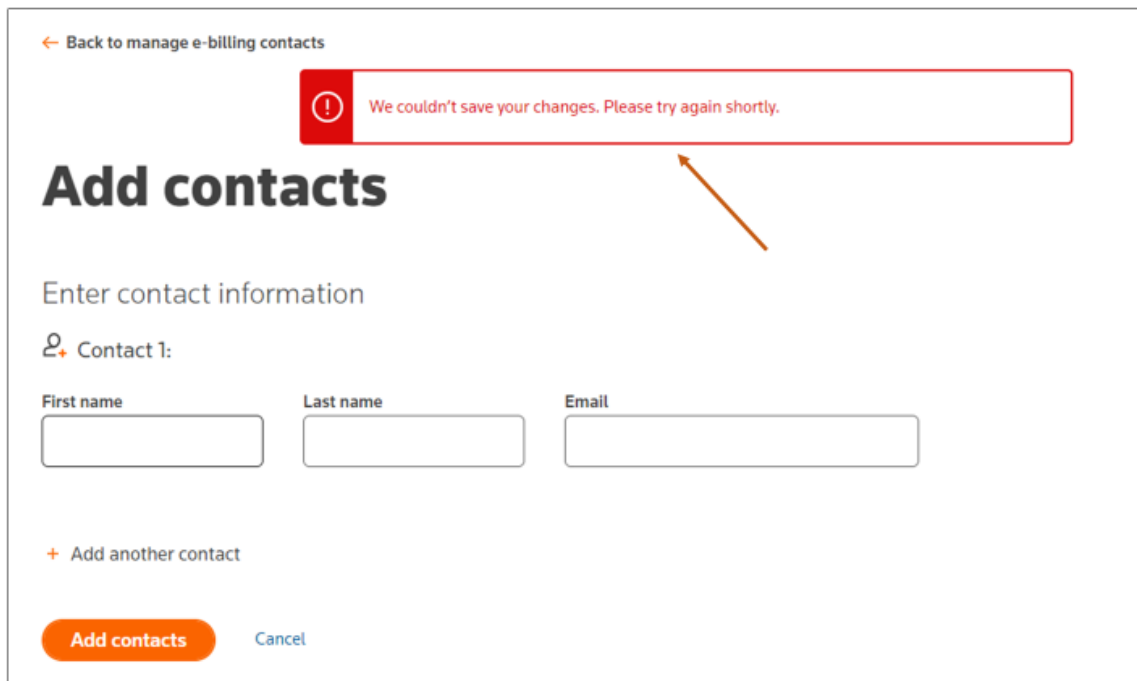
Failure to Download Library Maintenance Agreement

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




Failure to Save E-billing Contact Change

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



← Back to manage e-billing contacts



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

Add contacts

Enter contact information

👤 + Contact 1:

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

+ Add another contact

Add contacts Cancel

Missing Invoice

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

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

Billing User access Orders Subscriptions Reports Support Account number: ▼

Billing

Total due (USD)

\$34,735.91

[Pay total due](#)

Includes a past due amount of **\$34,735.91**

[Pay past due](#)

Autopay

Set up autopay and never miss a due date.

[Set up autopay](#)

Quick links


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

Open Paid invoices

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


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

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



Did you know?

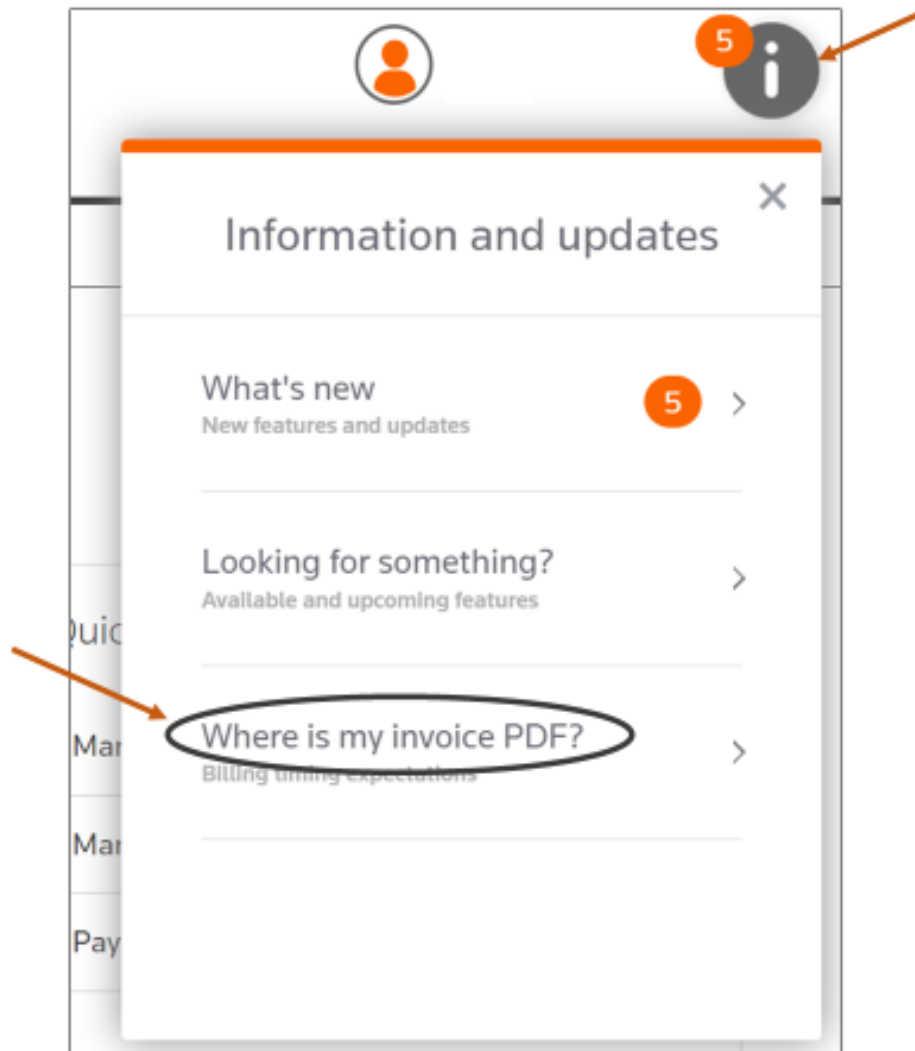
Online invoices (West information charges) are generated at the beginning of each month. Individual charges are visible on our self-service portal by the fourth day of each month and invoice PDFs are available for download by the seventh to eighth day of each month. Invoices are mailed shortly thereafter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

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

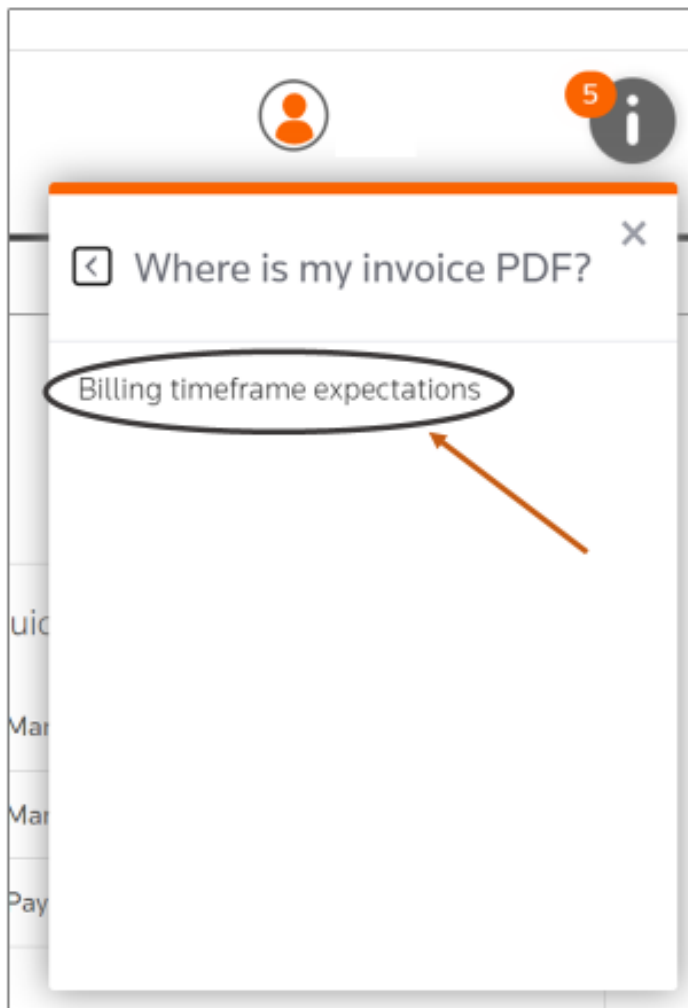
For more details, review [this article](#) in our Support Center.

Close

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



Next, click **Billing timeframe expectations**.



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

OnePass Log-in Issue


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

Suspended Account / Reactivate Account


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

Your account is suspended for non-payment

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



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



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

Unable to Chat with Live Agent

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

