

On the provided login page, type in your email, password and click on the "Login" button.

**Please note:** We recommend using any modern browser for the best experience

- 1 Once you are logged into the Customer Portal, click on "My Profile."



- 2 If you're NOT an Administrator on your account, please skip to #3 on the next page.

Upon clicking "My Profile" as an **Administrator**, you will see the tabs for **Account Information**, **Payment Information**, and **User Settings**.



To make changes to your **Account Information**, click on the "Edit" button.



The **Account Information**, will allow you to edit your firm’s address, billing contact and billing code.

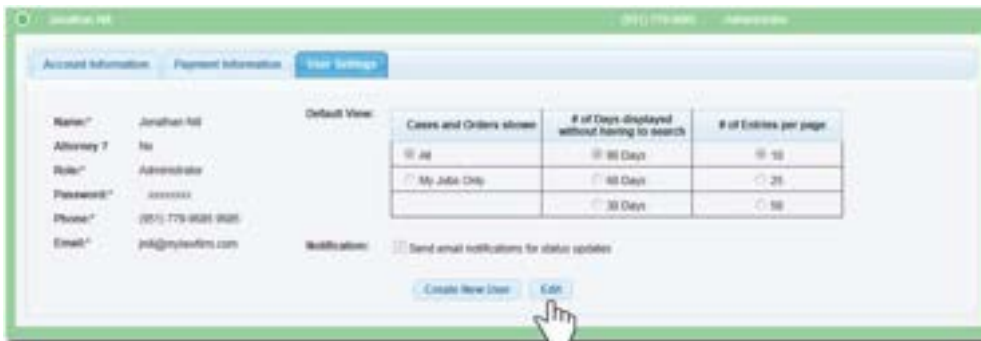
The billing code is your internal billing reference, file, or client matter number. By selecting “Yes,” a billing code will be required everytime an order is placed by the users in your account.

To update your **Account Information**, click on the “**Save**” button.



**3** The **User Settings** tab will allow you to make changes on the user profile, including password, phone number and email. You can also edit view only what you want to see by changing the default views and allowing you to filter your cases to fit your work style.

To make changes to your **User Settings**, click on the “**Edit**” button.



Changing the Default View to your “**Cases and Orders.**”

Choose to view all the orders placed by all the users within your firm by selecting “**All**” in the “**Cases and Orders Shown**” section. You may also view just the orders you placed by selecting “**My Jobs Only.**”

 Changing the Default View to your “# of Days displayed without having to search.”

Choose to view all the job orders that have been placed in the last **30 days**, **60 days** or **90 days**.

 Choose to view the “**Number of Entries**” per page.

Default View:


Cases and Orders shown	# of Days displayed without having to search	# of Entries per page
<input checked="" type="radio"/> All	<input checked="" type="radio"/> 90 Days	<input checked="" type="radio"/> 10
<input type="radio"/> My Jobs Only	<input type="radio"/> 60 Days	<input type="radio"/> 25
	<input type="radio"/> 30 Days	<input type="radio"/> 50

 To make changes to your **Payment Information**, click on the “**Edit**” button.




You may change your Payment Option to **ACH (eCheck)** or **Credit Card**. The **Payment Information** will allow you to edit your Credit Card or Bank information. After you make the changes to your **Payment Information**, click on the “**Save**” button.













4 To view all the users for the firm, click on the  symbol to close your user window.



Edit any of the user’s “Default View” by clicking on the  Symbol next to their name to open their profile and make the needed changes.

**Note: Staff (non-Administrators) will only be able to view their own profile. They will not be able to view the Account Information, Payment Information, or Settings of other staff.**

My Profile

User Name	Email	Phone	Role	Attorney	Bar #
 Jonathan Hill	jhill@mylawfirm.com	(909) 555-1212	Administrator	<input type="checkbox"/>	
 Barbara Wilson	bwilson@mylawfirm.com	(909) 555-1212	Staff	<input type="checkbox"/>	
 Linda Davis	ldavis@mylawfirm.com	(909) 555-5000	Staff	<input type="checkbox"/>	
 Daniel Christensen	dchristensen@mylawfirm.com	(909) 555-1212	Staff	<input type="checkbox"/>	
 Mary Johnson	mjohnson@mylawfirm.com	(909) 555-5000	Staff	<input type="checkbox"/>	
 James Miller	jmill@mylawfirm.com	(909) 555-1212	Staff	<input type="checkbox"/>	
 Raive Tall	rtall@mylawfirm.com	(909) 555-1212	Staff	<input type="checkbox"/>	
 Mike Arvartz	lar@mylawfirm.com	(909) 555-1212	Staff	<input type="checkbox"/>	
 Rhonda Wendleton	rwendleton@mylawfirm.com	(909) 555-1212	Administrator	<input type="checkbox"/>	12345
 Patricia Abbey	pabbey@mylawfirm.com	(909) 555-1212	Staff	<input type="checkbox"/>	

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