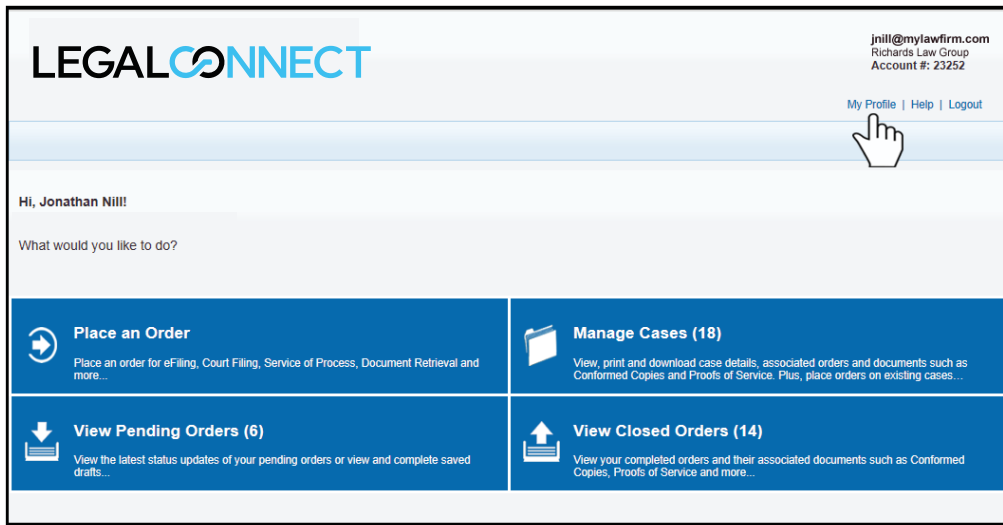


On the provided login page, type in your email, password and click on the "Login" button.

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**.

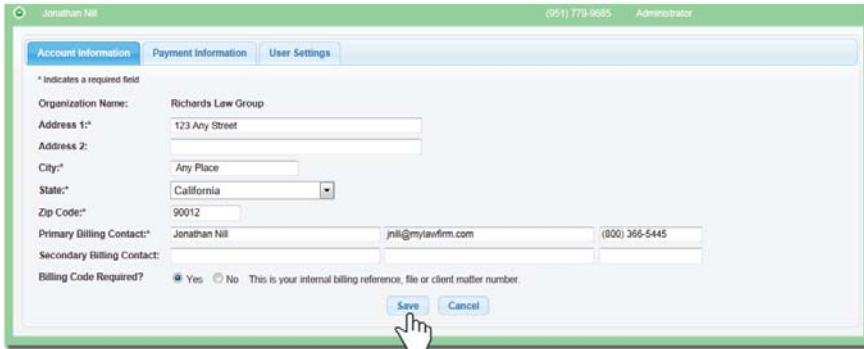
 To make changes to your **Account Information**, click on the "Edit" button.



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

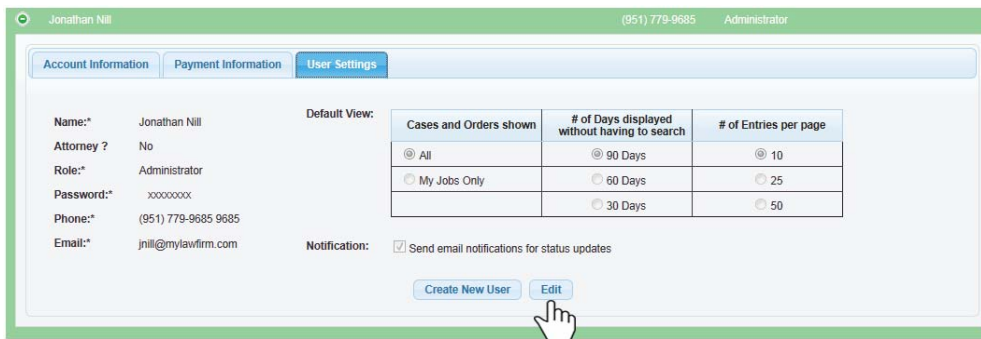
The billing code is your internal billing reference, file, or client matter number. By selecting “Yes,” a billing code will be required everytime an order is placed by the users in your account.


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.

Jonathan Nill

Account Information Payment Information User Settings

* Indicates a required field

Organization Name: Richards Law Group

Address 1:* 312 W. 2nd Street, Suite 1006

Address 2:

City:* Los Angeles

State:* California


Zip Code:* 90012

Primary Billing Contact:* jnill@rapidlegal.com

Secondary Billing Contact: , ,

Billing Code Required? Yes

Edit

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-Adminstrators) 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 Nill | jnill@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 | (555) 555-5555 | Staff | <input type="checkbox"/> | |
| Daniel Christianson | dchristianson@mylawfirm.com | (909) 555-1212 | Staff | <input type="checkbox"/> | |
| Mary Johnson | mjohnson@mylawfirm.com | (555) 555-5555 | Staff | <input type="checkbox"/> | |
| James Miller | jmiller@mylawfirm.com | (909) 555-1212 | Staff | <input type="checkbox"/> | |
| Rose Toll | rtoll@mylawfirm.com | (909) 555-1212 | Staff | <input type="checkbox"/> | |
| Mike Arwartz | ter@mylawfirm.com | (909) 555-1212 | Staff | <input type="checkbox"/> | |
| Rhonda Wendelton | rwendelton@mylawfirm.com | (909) 555-1212 | Administrator | <input checked="" type="checkbox"/> | 12345 |
| Patricia Abbey | pabbey@mylawfirm.com | (909) 555-1212 | Staff | <input type="checkbox"/> | |

Show 10 entries Showing 1 to 10 of 44 entries

First Previous 1 2 3 4 5 Next Last