



How to manage your account

When you create an account, your details are stored in the **Account Details** area of the system. From that page, you can review your details, edit, and set preferences.

My Details

Once logged on, select **Account Details** located in the top right corner of your toolbar. **Account Details** will open the **My Details** page.

On this page, you can review your data and change your phone number. Use the tabs located at the top to change details, reset your password and resend verification emails.

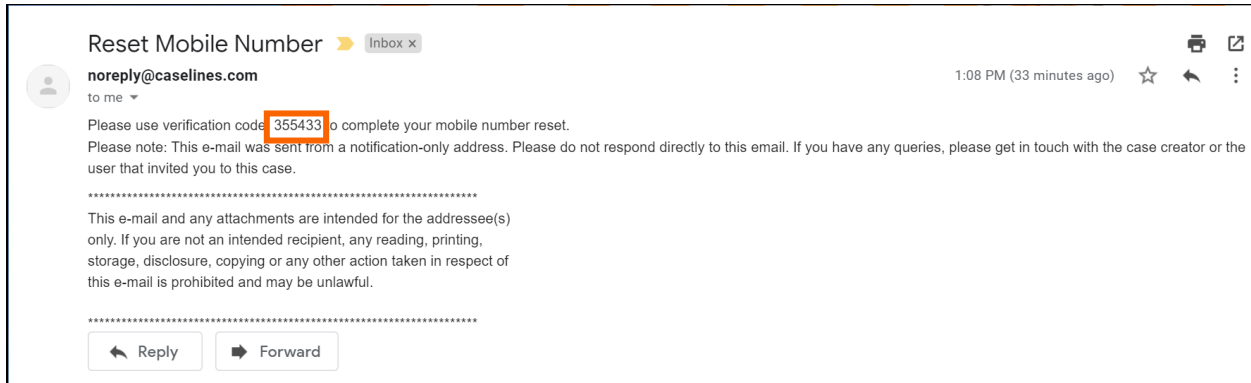
My Details	
Change Details Reset Password Resend Verification Emails	
Details	
Title (Mr, Mrs, ...)	Ms.
First Name	Sample
Last Name	Example
Mobile phone	555-555-5555 Change
Display Notifications	Yes
Primary Email	Sample_email@email.com <i>Verified</i>
User Name	User Name1254
Usual Role	Counsel
Organization	Headquarters
Usual Location	Base of Operations
Hide Email	No
Language	English
Time Zone	Detect Automatically
I consent to you providing me with business and marketing information.	Yes
Change Details Reset Password Resend Verification Emails	

Change Phone Number

Select the **Change** link across from the **Mobile phone** field to change your number or add a new number. **If you do not have a number listed**, you will be brought directly to the **Change Number** page. Select the country code and add your new number. Once you have entered your number, select **Save**.

The screenshot shows a navigation bar with links: Home, Invite Lists, View Case List, View Hearings, Support, Account Details, and Log Off. Below the navigation bar is a section titled "Change Number". Underneath, there is a "Details" section containing a "Mobile phone" dropdown menu. A red box highlights the "Save" button located below the dropdown menu.

If you have a number in the system and wish to change it, selecting the **Change** link on the **My Details** page will trigger the system to send you an email message with a verification code. Verification codes are an extra layer of security to protect your information.



Enter the code in the field required and select **Change Number**. You will then be able to enter your new number, as shown above.

The screenshot shows the same navigation bar as the first screenshot. Below it is the "Change Number" section. A message reads: "You have been sent an email with a temporary code. Please enter it below." Underneath, there is an "Account Information" section with an "Enter Code:" label and an input field. A red box highlights the input field. To the right of the input field is a "Request new verification code email" button. Below the input field is a "Change Number" button.

Change Details

Return to the **My Details** page to make changes to your account details, select **Change Details**.

The screenshot shows the 'Change My Details' form with the following fields and callouts:

- 1**: First Name (Sample)
- 2**: Organization (dropdown)
- 3**: Hide Email checkbox
- 4**: Display Notifications checkbox
- 5**: Role (Counsel)
- 6**: Language (dropdown)
- 7**: Role Note (text area)
- 8**: Time Zone (Detect Automatically)
- 9**: I consent to you providing me with business and marketing information. checkbox

The **Save** button is highlighted with a red box.

You can make the following changes directly on the **Change Details** page:

1. Make changes to your title, first name, and last name.
2. Change your organization. You will only see this option if you registered with an email associated with two or more organizations already set up in the system.
3. Hide your email address on the list of people for a case.
4. Turn on or off the notifications in the banner. Selecting the **Display Notifications** box turns on notifications, and a bell will appear in the top banner. Alerts will show here whenever a document change is made to any of your cases.
5. Select your role and location and add a role note.
6. Select a language. *This option is not available for all locations.*
7. Select a time zone – the system will look at the browser you are using to determine your time zone automatically, but you can also manually change it. All dates and times will then be



8. displayed in your local time. The time will show in places such as the audit trail and hearing times. The time zone will be displayed beside your name in the header on all pages.
9. Choose whether you want to receive business and marketing-related emails by checking or unchecking the box.

Once you have made edits, select the **Save** button.

Change Password

From the **My Details** page:

1. Select **Reset Password**.
2. On the **Change Password** page, type in your current password.
3. Type in a new password. It must be eight characters long, containing at least one upper case letter, one lower case letter, a number, and a special character.
4. Re-enter the new password to confirm it.
5. Select **Change Password**.