How to Make Changes in My Profile

Use **My Profile** to update your user details and choose how your orders are listed. If you are an administrator on your firm's account, you can also update the firm's account information, manage payment methods and change other users' default views.

Start here

LOG IN TO THE PORTAL →

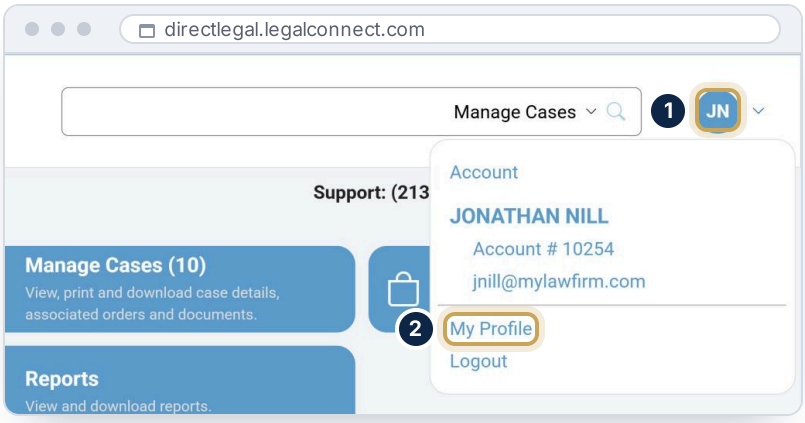
Or go to **directlegal.legalconnect.com** and log in with your email address and password. Use a current version of Chrome, Edge, Firefox or Safari.

What you will need

- Your email address and password
- Administrator access, to change your firm's account information, payment methods or other users' settings
- The card details, if you are adding a payment method

1 Open My Profile

Log in to your account. At the top right of any page, click your initials, then click **My Profile**.

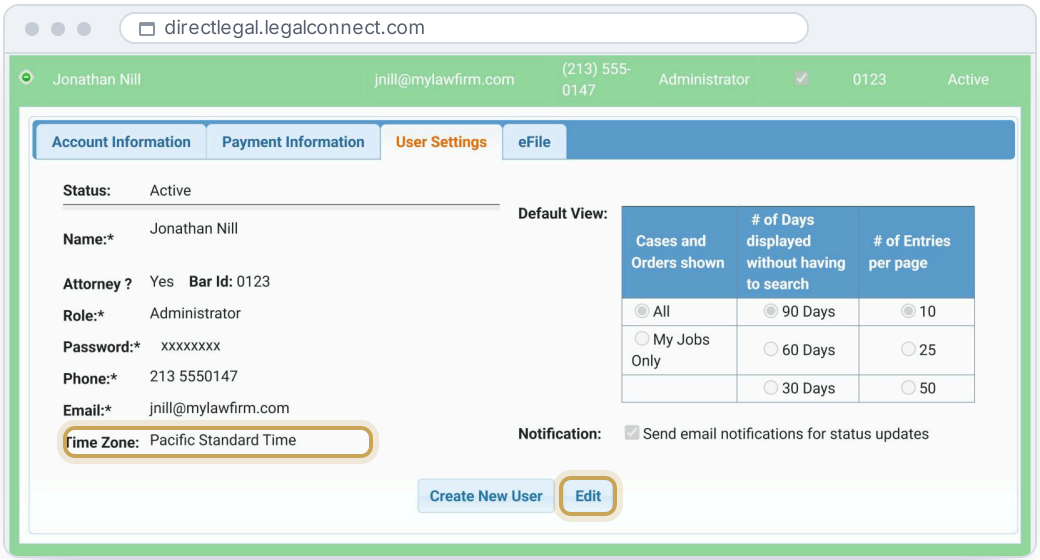


If you are not an administrator: You can view and change only your own profile. Steps 2 and 3 are all you need. Administrators also see the **Account Information** and **Payment Information** tabs.

Your user settings

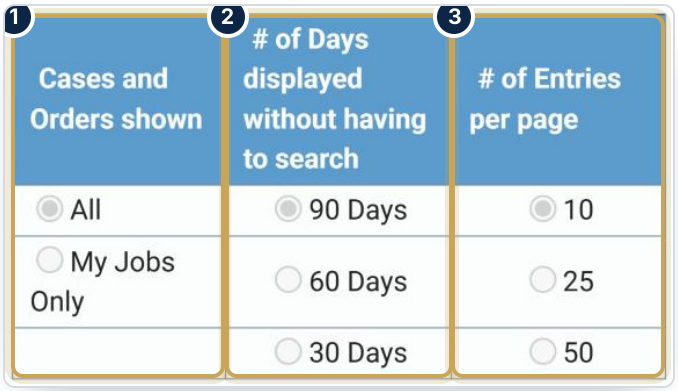
2 Edit your user settings

Open the **User Settings** tab and click **Edit**. Here you can change your password, phone number, email address and **Time Zone**, choose your default views, and choose whether to get **email notifications for status updates**.



3 Choose your default views

Default views set which orders you see without having to search, so your lists fit the way you work.



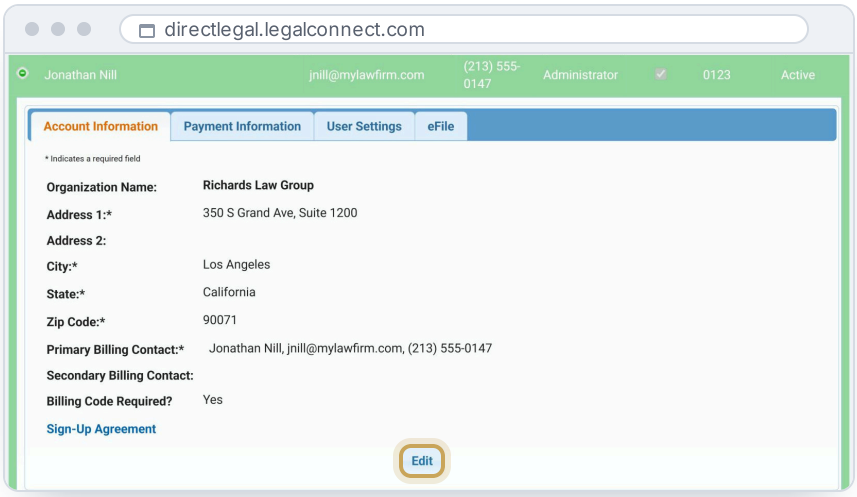
1. **Cases and Orders shown:** choose **All** to see the orders placed by every user in your firm, or **My Jobs Only** to see only the orders you placed.
2. **# of Days displayed:** see the orders placed in the last **30**, **60** or **90 Days**.
3. **# of Entries per page:** show **10**, **25** or **50** entries on each page.

Save your changes when you are done.

For administrators: your firm's account information

4 Click Edit on the Account Information tab

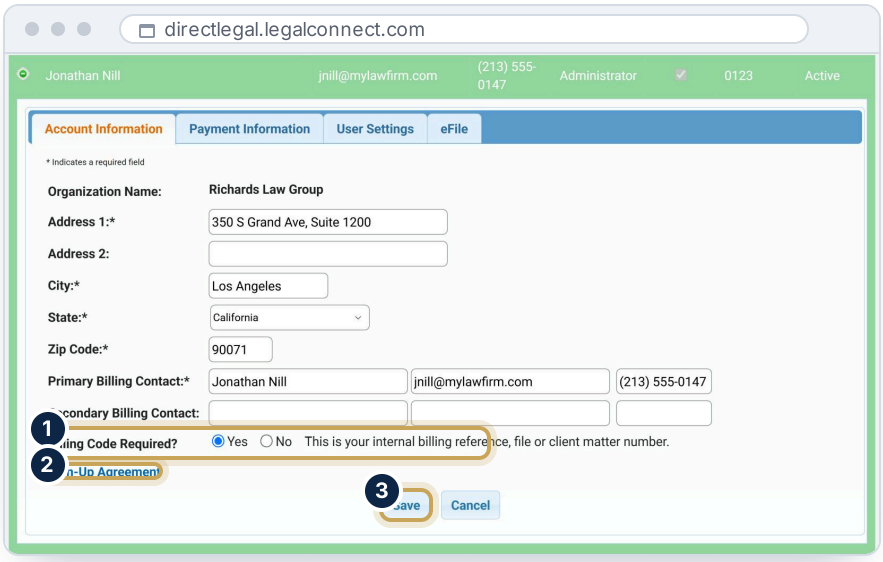
The **Account Information** tab shows your firm's address, billing contacts and billing code setting. Click **Edit** to change them.



5 Update the details and save

Change your firm's address and the primary and secondary billing contacts as needed.

Under **Billing Code Required?**, choose **Yes** to make every user on your account enter a billing code each time they place an order. The billing code is your internal billing reference, file or client matter number. Click **Save**.

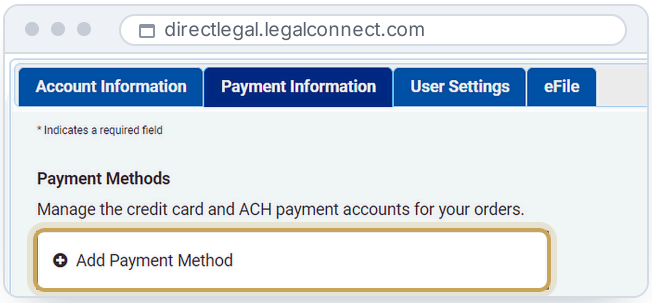


To read the agreement your firm accepted when it opened its account, click **Sign-Up Agreement** (2), below the billing code setting.

For administrators: payment methods

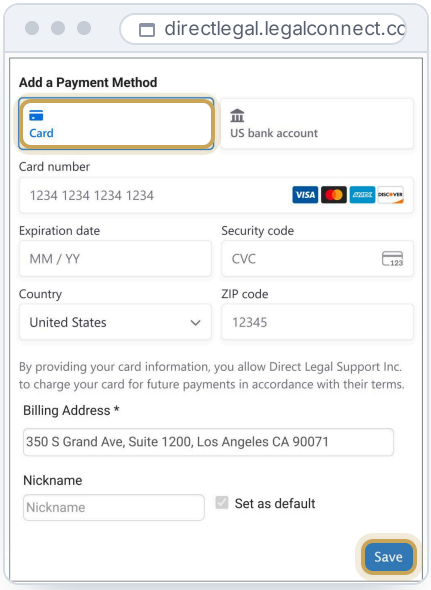
6 Click Add Payment Method

Open the **Payment Information** tab. Under **Payment Methods**, click **Add Payment Method**. If your account has no saved payment methods yet, the form opens on its own.



7 Enter the card details and save

Click **Card**. Enter the **Card number**, **Expiration date** and **Security code**, then the **Country**, **ZIP code** and **Billing Address**. You can add a **Nickname** to tell your cards apart. Check **Set as default** to make it your default payment method, then click **Save**.

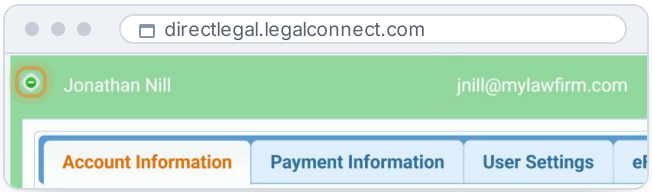


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For administrators: the users on your account

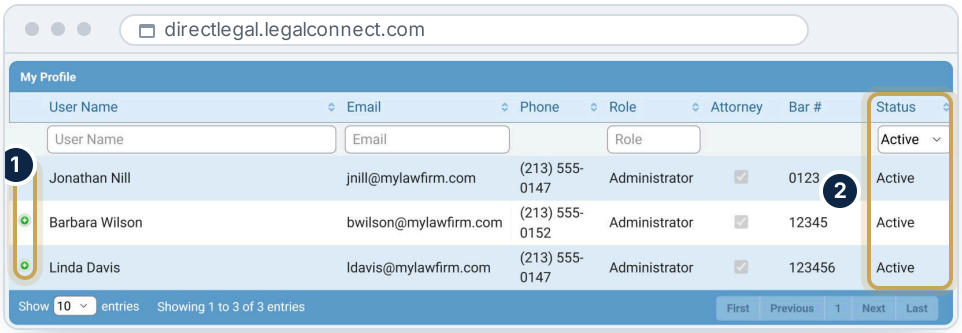
8 See all of your firm's users

Click the ⊖ symbol next to your name to close your user window. The list of every user on your firm's account appears.



9 Change a user's default view

Click the ⊕ symbol next to a user's name to open their profile (1). Then change their **Default View** the same way you change your own in step 3.



The **Status** column (2) shows whether each user is **Active** or **Inactive**. The list shows active users; to see the others, choose **Inactive** or **All** in the box under Status.

Adding a coworker?

New users sign up with your firm's Customer Account number and ZIP code. See our **Adding a User to an Existing Account** guide.

More than one card?

You can save several payment methods and choose one for each order. See our **Payment Profiles** guide.

Questions? We're here to help.

Call our Litigation Division Monday to Friday, 8:30 a.m. to 5:00 p.m. Pacific, or email info@directlegal.com. Ready to order? Log in to the portal.

(800) 675-5376