

Software Assistant

Changes to Username security



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1. INTRODUCTION TO THE NEW USERNAME SECURITY CHANGES

What are the new security changes?

We are implementing a new state-of-the-art customer identity and access management system that will make accessing our products even safer and more secure. This means a change to the way you authenticate during the login process on our Software Assistant website.

What does it mean for you?

For stronger security measures, the customer login on the Software Assistant website will soon require a **valid email account** to be used as your username.

This change applies to the following areas:

- Logging in via the Software Assistant **website**
- Registering Software Assistant modules using the **Register Assistant**

IMPORTANT: There are no changes to your Software Assistant application (desktop) login. Please continue to use the same username and password as normal when using the software.

There will also be a one-time only requirement to reset your password to ensure that it meets the new minimum requirements which are explained below.

When will the changes take effect?

The new security changes will be effective from **December 2, 2022**.

From this date, you'll need to use your **email address** when logging into your Software Assistant website application or when registering your software.

Changes to Username

As part of the new and secure login process, a valid email address is required to be used for your login name.

Please consider which of the following applies to you:

- **My Username matches my email address** – there's no changes.
- **My Username is different to my email address** - we have automatically updated usernames to match your email address associated to your account. Please use your email address associated to your account profile when logging in.

Passwords will need to be reset

As part of the new security requirements, you will need to reset your password to ensure that it meets the new minimum requirements. The steps on how to reset are explained below.

Note: This is a one-off process that will need to be completed **BEFORE** you can login.

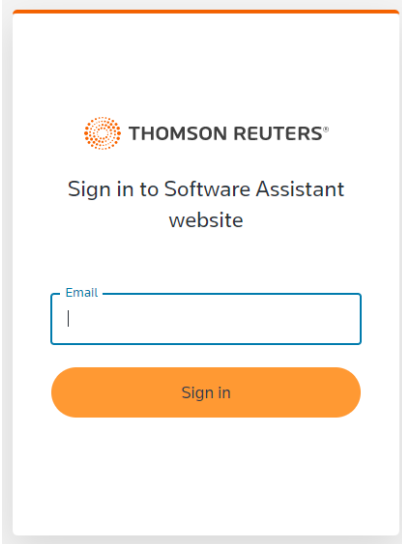
2. EXISTING USERS: I ALREADY HAVE A SOFTWARE ASSISTANT WEBSITE LOGIN

If you have an existing Software Assistant website account, please read the information and instructions to help you with the new changes.

How to login and reset your password

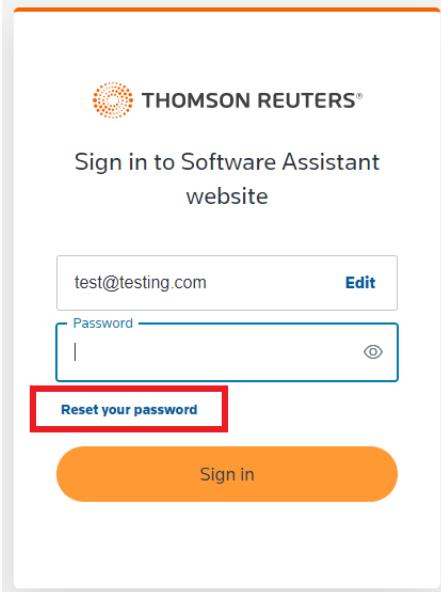
Complete the following steps:

1. Go to <https://softassist.com.au/Overview.aspx> and select **Client Login**.
The new Software Assistant website login page displays.
2. Enter you email address and click **Sign In**.



The screenshot shows the Thomson Reuters logo at the top, followed by the text "Sign in to Software Assistant website". Below this is an input field labeled "Email" with a vertical cursor. At the bottom is an orange rounded button labeled "Sign in".

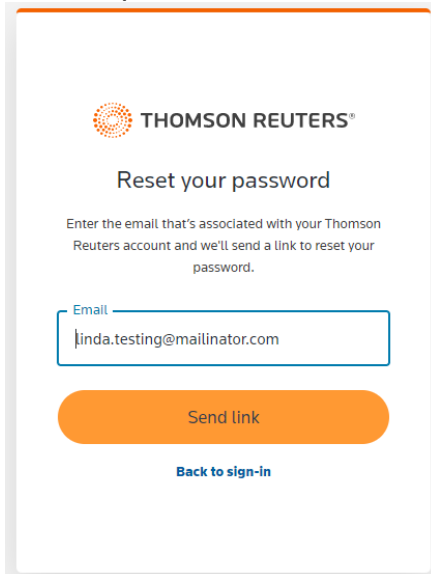
3. As a one-time process you will need to reset your password. Click **Reset your Password**.



The screenshot shows the Thomson Reuters logo at the top, followed by the text "Sign in to Software Assistant website". Below this are two input fields: one for "Email" containing "test@testing.com" with an "Edit" link, and one for "Password" with a visibility icon. A red box highlights a link labeled "Reset your password" below the password field. At the bottom is an orange rounded button labeled "Sign in".

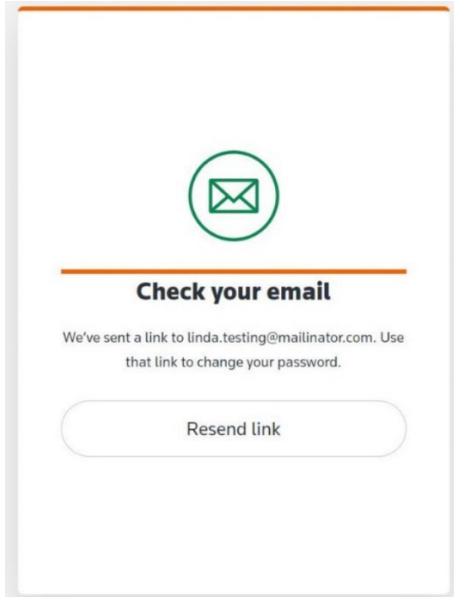
Note: This is the email address that you have associated to your account profile.

4. Confirm you have entered the correct email address and click **Send link**.



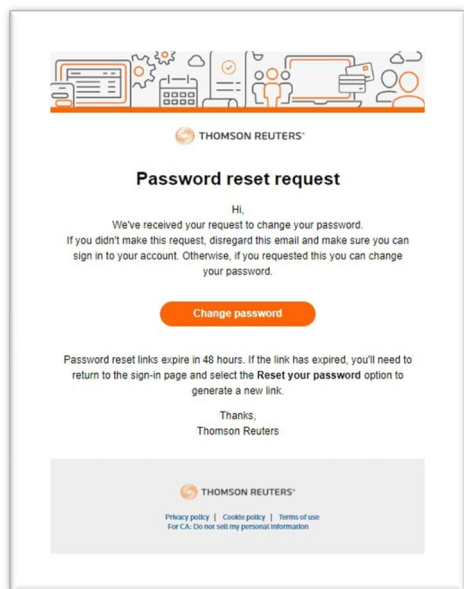
The screenshot shows the Thomson Reuters password reset interface. At the top is the Thomson Reuters logo. Below it is the heading "Reset your password". A sub-heading reads: "Enter the email that's associated with your Thomson Reuters account and we'll send a link to reset your password." There is a text input field labeled "Email" containing the address "linda.testing@mailinator.com". Below the input field is an orange button labeled "Send link". At the bottom, there is a link that says "Back to sign-in".

5. A "Check your email" confirmation message will appear.

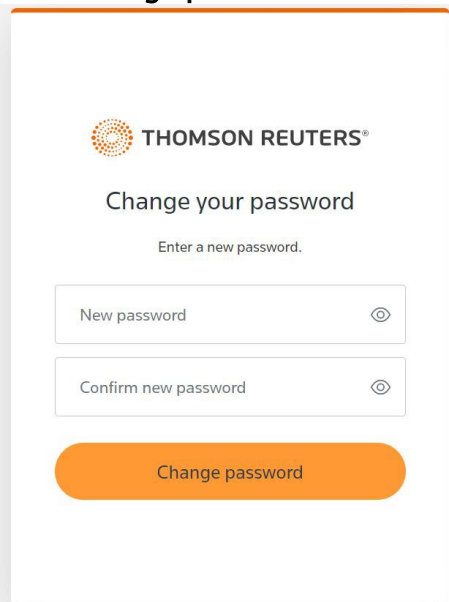


The screenshot shows a confirmation page with a green envelope icon in a circle at the top. Below the icon is the heading "Check your email". A sub-heading reads: "We've sent a link to linda.testing@mailinator.com. Use that link to change your password." At the bottom, there is a button labeled "Resend link".

6. Open your email account and locate the “Password reset request – Software Assistant” email and click **Change password**.

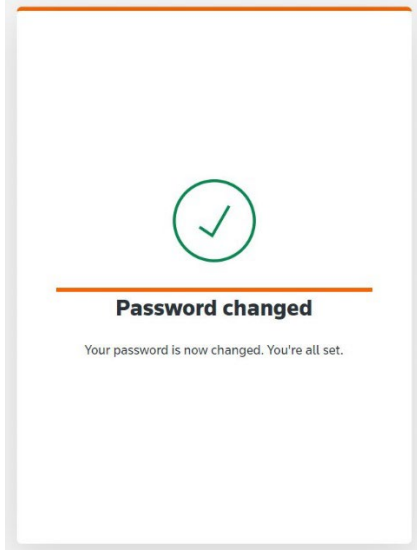


7. The Change your password window appears. Enter your **New password**, **Confirm new password**. Click **Change password** when finished.



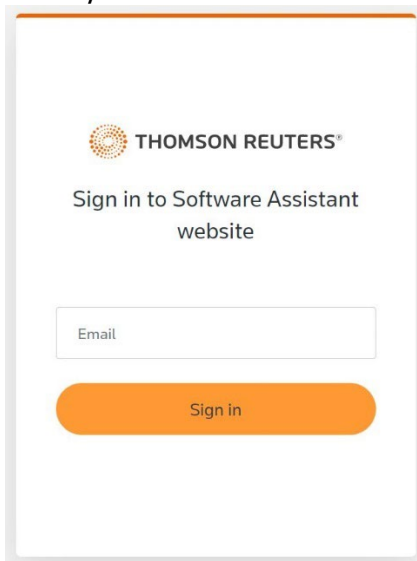
Note: Your new password must meet the minimum requirements.

8. The **Password changed** confirmation displays.



9. Return back to <https://softassist.com.au/Overview.aspx> and select **Client Login**. The new Software Assistant website login page displays.

10. Enter your email address and click **Sign in**.



11. Enter your (new) Password and click **Sign In**.

The screenshot shows the login page for Thomson Reuters Software Assistant. At the top is the Thomson Reuters logo and the text "THOMSON REUTERS®". Below this is the heading "Sign in to Software Assistant website". There is a text input field containing the email address "linda.testing@mailinator.com" and an "Edit" link. Below the email field is a password input field with a "Password" label and a toggle icon. A link for "Reset your password" is located below the password field. At the bottom of the form is a large orange button labeled "Sign in".

12. You are now logged in using your email address and your new password.

The screenshot displays the user portal for Thomson Reuters Software Assistant. The top navigation bar includes the Thomson Reuters logo, "THOMSON REUTERS | TAX & ACCOUNTING", and the main heading "SOFTWARE ASSISTANT". A secondary navigation bar contains links for OVERVIEW, PRODUCTS, CUSTOMER SUPPORT, TRAINING, KNOWLEDGE BASE, DOWNLOADS, CONTACT US, and CLIENT LOGIN. The main content area is titled "USER PORTAL" and includes a welcome message: "Welcome to your secure user portal. Please choose from one of the following options:". Below this message are four main options, each with an icon and a brief description: "Contact Details" (person icon) for viewing or changing personal details; "My Orders" (box icon) for viewing orders and invoices; "My Registrations" (computer icon) for viewing, registering, or de-registering licenses; and "Update Centre" (box icon) for installation and update files. A "Renewal Or Upgrade" option (box icon) is also present for upgrading products. On the left side of the portal, there is a vertical menu with the following items: "User portal", "Contact Details", "My Orders", "Renewal or Upgrade", "My Registrations", "Bank Feeds", "Update Centre", and "Log off".

3. NEW USER: I DO NOT HAVE A SOFTWARE ASSISTANT WEBSITE LOGIN

If you are new to Software Assistant, before you can access the Software Assistant website (portal) you will need to create an account. Please read the following instructions.

How to create a new account

Follow these instructions on how to create an account:

1. Go to www.softassist.com.au/overview and click **Buy Now**.
The Order Form page displays.
2. Enter the Order form details as required, including which modules you would like to purchase.

ORDER FORM

Thank you for choosing Thomson Reuters. Please complete this form to complete your purchase online. Before you submit the form, check the **accuracy** of will emailed the software set-up instructions, unlock code and registration key to the specified email address once your purchase is complete. Be sure your as it will be linked to the unlock code.

For further assistance, contact supportanz@thomsonreuters.com

[Click here if you prefer to order by mail](#)

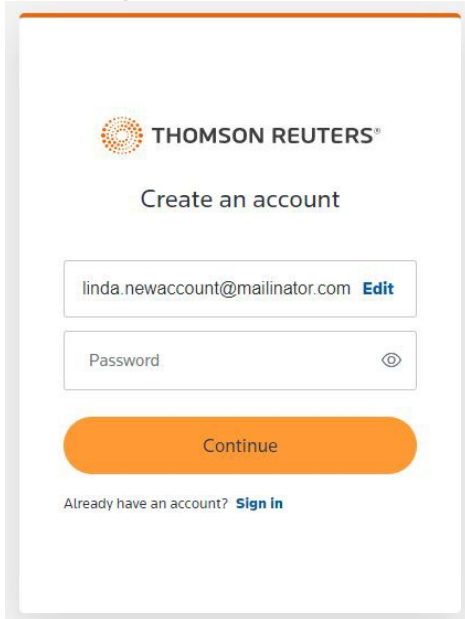
Personal details

* indicates required field.

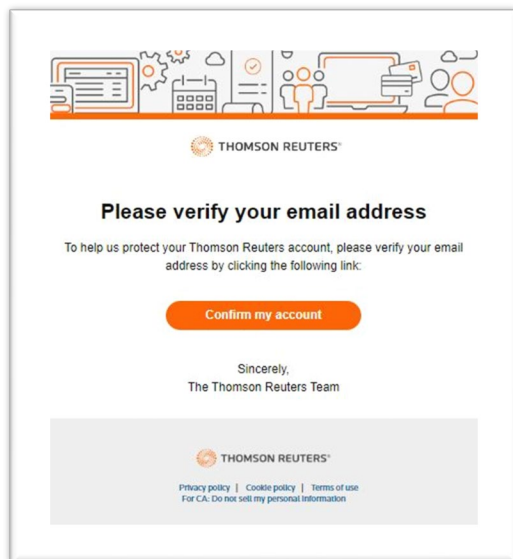
Business name	<input type="text"/>	*	
ABN	<input type="text"/>		
Contact name	<input type="text"/>	*	
Postal address	<input type="text"/>	*	
	<input type="text"/>		
Town or Suburb	<input type="text"/>	*	
State	<input type="text" value="Please select ..."/>	*	
	Post code	<input type="text"/>	*

3. Click **Submit Order** located at the end of the page.

4. A **Create your account** window will appear.

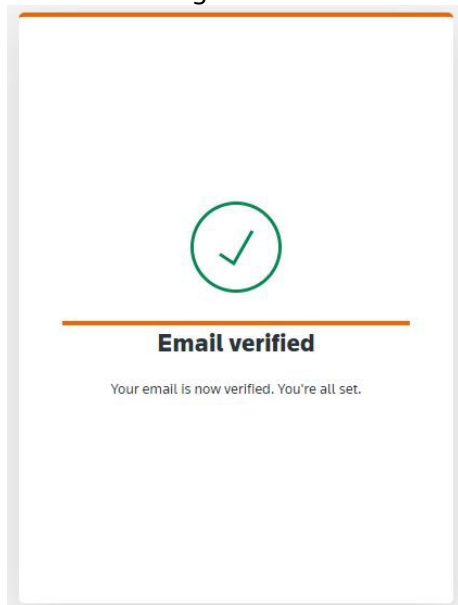


5. Enter a password and click **Continue**.
You will now be directed to the payment screen.
6. Enter your payment details to complete your order and click **Pay now**.
The account is now created.
7. Lastly, a **Please verify your email address** will be sent.
Please open this email and click **Confirm my account**.



Note: You have 30 minutes to confirm your email address. After 30 minutes, you will not be able to log into the Software Assistant website.

8. An **Email verified** message appears.
You can now log in to the Software Assistant website.

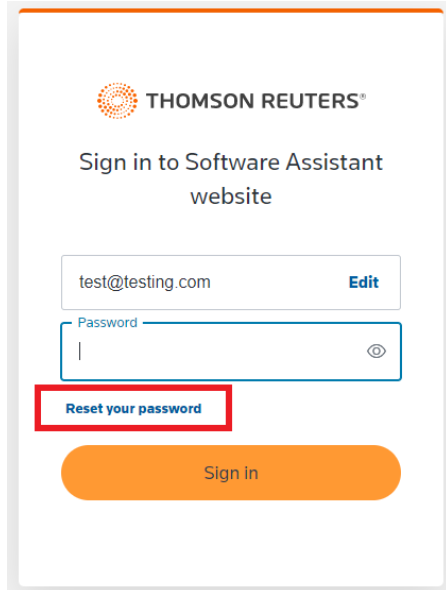


4. TROUBLESHOOTING / FAQ'S

I don't remember my password

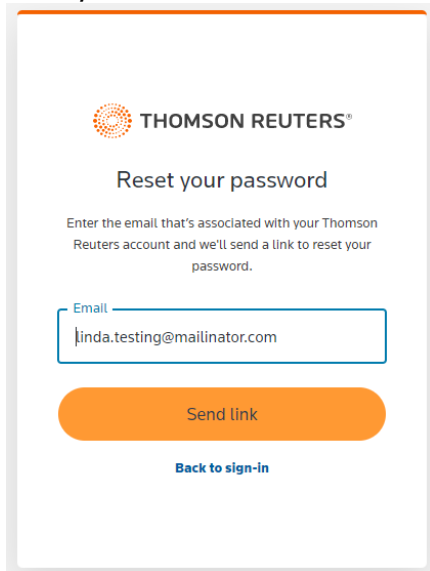
Can't remember your new password? That's ok...it's easy to reset it.

1. At the Sign in window, click **Reset your password**.



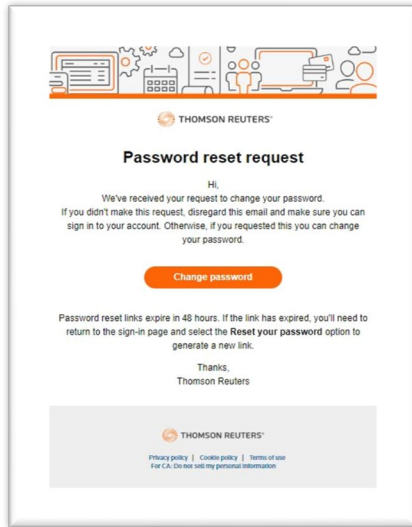
The screenshot shows the Thomson Reuters sign-in page. At the top is the Thomson Reuters logo and the text "Sign in to Software Assistant website". Below this is a form with two input fields: "Email" containing "test@testing.com" and "Password" which is empty. To the right of the email field is an "Edit" link. Below the password field is a "Reset your password" link, which is highlighted with a red rectangular box. At the bottom of the form is a large orange "Sign in" button.

2. Enter your email address and click **Send link**.

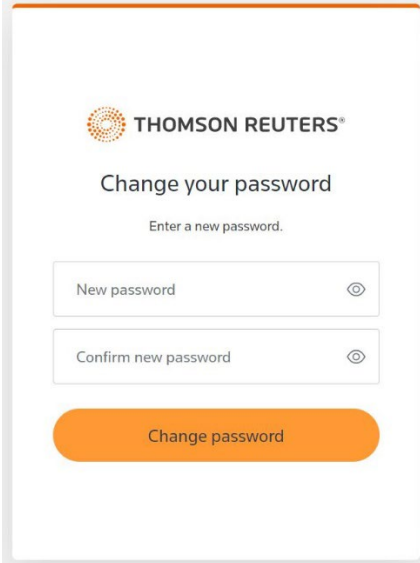


The screenshot shows the Thomson Reuters password reset page. At the top is the Thomson Reuters logo and the text "Reset your password". Below this is the instruction: "Enter the email that's associated with your Thomson Reuters account and we'll send a link to reset your password." Below the instruction is an "Email" input field containing "linda.testing@mailinator.com". At the bottom of the form is a large orange "Send link" button and a "Back to sign-in" link.

3. A Password reset request email will be sent. Open the email and click **Change password**.



4. Enter your **New password**, **Confirm new password** and click **Change password**.



5. Your password has been updated. You can login again using your new password.

I can't remember which email I have on my profile!

Not sure which email address you have associated to your account?

Check your inbox for past Software Assistant email communications. For example, check the email that you are currently receiving the Software Assistant release emails, yearly renewal emails etc – this is likely going to be the email address.

If you still don't know, call our support team for help on 1800 074 333.

I cannot login to the Software Assistant website!

If you are unable to login, it's usually an indication that there is an issue with either your email address (username) or your password.

- **Email address (username)**
Just a reminder, your username is now your email address. Anything other than your email associated to your profile will NOT be accepted. Please check that you are using the email associated to your account.
- **Password reset**
Make sure you have completed the one-time password reset before you attempt to login.

If you have checked your email address and have reset your password but are still experiencing issues, please contact our support team for assistance on 1800 074 333.

I want to change the email address on my profile

1. For security purposes, you need to firstly login to your Software Assistant account.
2. Once you're logged in, click **Contact Details**.

Personal details

Login name: linda.testing@mailinal

Registration name: [] Registration password: []

Both the login and registration details can be used when registering the software. However, only login details can be used to login to the user portal at www.softassist.com.au

Email: linda.testing@mailinator.com *

Business name: [] *

Contact name: [] *

Postal address: [] *

Town or Suburb: [] *

State: NSW * Post code: 3434 *

Telephone: 02 1235646789 *

Fax: []

Mobile: []

What software did you use previously?: Please Select *

[Update]

Note: When you change your email address, your username will also be updated at the same time. This is because your username and email address **MUST** match.

3. Update your email address as required and click **Update** to save the changes. It's recommended that you check that all your other details are up-to-date.
4. You will receive an email to **Verify your email**. Please open the email and complete the verification process. Note: If you do not verify your email, you will not be able to login into the Software Assistant website after 30 minutes.

What if I don't verify my email address?

- **For existing Software Assistant accounts**

If you have changed your email address on your profile, you must also verify your email address within 30 minutes of the change. After that time, you will not be able to login until you have verified your email address.

- **For new Software Assistant accounts**

You must verify your email address within 30 minutes of your account being created. After that time, you will not be able to login until you have verified your email address.

I use other Thomson Reuters software, are they changing too?

Thomson Reuters is planning to roll out these new security changes across all products. This will enable clients to use one single login across any of the Thomson Reuters products available.

In Australia we have currently implemented this for **Cleardocs** and for the **Software Assistant website**. This means that if you are currently subscribed to both products, you will use the same username and password for both.

What if I do nothing...what does that mean?

Our focus is to ensure minimal impact to you and your business. However, it will require some initial review from you.

As mentioned above, and depending on your scenario, you may need to reset your password and/or verify your email address.

Depending on your scenario, if you don't reset your password or verify your email, you will not be able to:

- Renew your license for the next year, including purchasing additional licenses
- Register your product
- Modify details on your account or add new users to your account
- Download a full product installation
- Access your Bank Feeds information

We strongly recommend that you take the necessary action immediately to avoid any issues in the future.

I never received any emails about this!

From October 2022, we started a series of email communications to let you know in advance of the upcoming changes.

If you did not receive any of our emails, please check the following:

- Is the email address on your profile correct?
- Did the emails get lost in your SPAM/JUNK folder?
- Have you unsubscribed to our emails?

We recommend that you call our support team on 1800 074 333 if you need further help.