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Is There a Deadline for Purchasing Classes?

If you are purchasing a class, you will need to have purchased and registered 24 hours prior to the class.

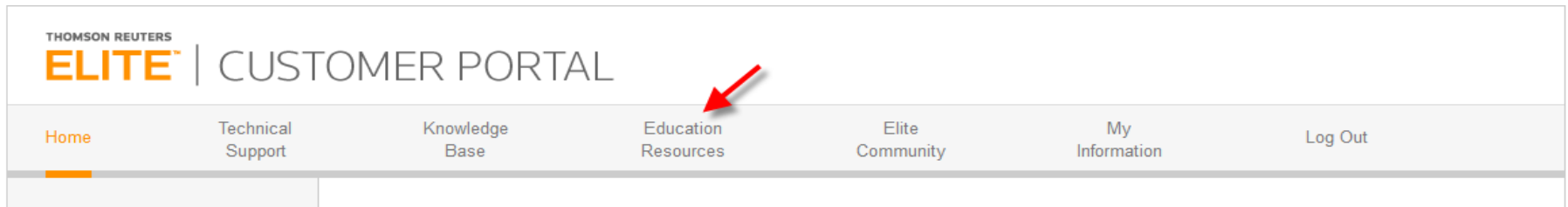
Webinar classes close at 8:00 a.m. EST the day before the class.

Classroom/regional classes are set to close 14 business days prior to the class due to travel.

What do I do if I Don't have a Login for the Customer Portal?

All participants for any class, must have a login and password for the Customer Portal. This is how participants are authenticated for the Education Services site.

Contact Customer Support and have them add you as a contact on the account for the Education Services site. You can be added for the Education Services Site without having credentials to enter support tickets.



How Do I Purchase My Classes?

Step 1 – Log into the [Customer Portal](http://customerportal.elite.com/) - <http://customerportal.elite.com/>

Step 2 – Within the Customer Portal, click on the Elite Education Services Hub link

Step 3 – You will now be on the Elite Education Services Hub **Home Page**

Step 4 – Once you are in the Education Services Hub you can search for Educational Webinars, Online Training and Regional Training.

How do I Search and Register for a Class?

Step 1 – Click on the **Current Class Schedule** for all classes that are scheduled or



Current Class Schedule



Course Catalog

It is also listed alphabetically under the Current Class Schedule section on the bottom left



CURRENT CLASS SCHEDULE

Search Term(s):

3E Accounts Payable Overview - Educational Webinar

Type: Instructor Led Class Start Date: 4/21/2017 10:00 AM (America/New_York) Duration: 1 hour 30 minutes

3E Accounts Payable Overview - Educational Webinar

Type: Instructor Led Class Start Date: 5/24/2017 3:00 PM (America/New_York) Duration: 1 hour 30 minutes

3E Accounts Payable Overview - Educational Webinar

Type: Instructor Led Class Start Date: 4/21/2017 10:00 AM (America/New_York) Duration: 1 hour 30 minutes



How Do I Purchase My Classes (cont'd)?

Step 2 - Search for desired **Class**

Step 3 - Click on the **Title of the Course** (you will see the details of the course)
or Click on the **Scheduled Classes** box

Details ▶

Scheduled Classes ▶

Step 4 - Click the box for the desired scheduled class (at the bottom of the screen)

Step 5 - Click **Add to Cart** (top right of screen)

Step 6 - Proceed to Checkout

Step 7 - Enter in Billing and Payment information. **Please note:** This information must match the financial institutions billing information which is listed for the card.

Step 8 - **Submit**

Step 9 - Once your credit card has successfully transmitted you will receive an email confirmation of your purchase

This confirmation comes from Learning System Administrator.



How Do I Purchase My Classes (cont'd)?

Purchasing a class is the form of payment and does not enroll you in the scheduled class. Please proceed to **Enroll** in the class

Step 1 - Find the **Course** you purchased

Step 2 - Go to the list of **Scheduled Classes**

Step 4 - Click on the **radio button** with the date you would like to enroll

Step 3 - Enroll in the **Scheduled Class**



Confirmation Email and Additional Participants

You will then receive an email confirmation from **Learning Systems Administrator**. If you have purchased a course that is “**per firm**”, please send the below information to elite.education.services@thomsonreuters.com.

All participants must be verified as a contact within the Customer Portal. If they are not in the portal, it can take up to 24-48 hours to make sure they are added.

- First Name, Last Name
- Email address

If you are purchasing a course that is “per participant”, you will need to purchase and register each participant.

Please check your **SPAM** or **JUNK** folders for these emails. You can authenticate the @sumtotalsystems.com as a valid email to receive for future notifications.

Note: All participants for any class must have their own unique login and ID in order to launch the class. Login's cannot be shared – they can only be launched by one person. In the event the one registered person is out of the office, no one will be able to access the class. It is important that the participants are enrolled at least 2 days prior to the class to verify system access.



System Requirements to Launch Class

Please make sure you test your system requirements several days before the class to ensure your firewall does not block WebEx.

Please test your access to the Client Portal **Customer Portal** - <http://customerportal.elite.com/> to ensure you will not have any problems accessing the class. Contact elite.education.services@thomsonreuters.com if you experience any problems with the Customer Portal access.

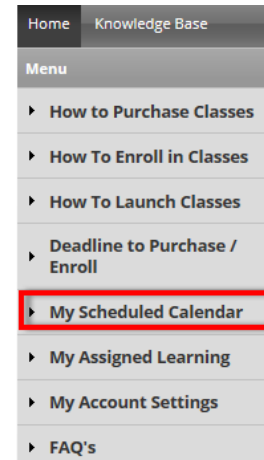
Please ensure that the computer is able to launch WebEx. Below are some links which will help. Your IT department may need to allow WebEx as a authenticated website.

- Verify that you meet the minimum [system requirements](#).
- [Join a test meeting](#) to confirm that you're able to successfully join a meeting (this takes a few minutes so it should be done ahead of time. A blank screen will come up before it joins you to a “test” Webex)



How Do I Launch My Classes?

- Step 1** – Log into the [Customer Portal](http://customerportal.elite.com/) - <http://customerportal.elite.com/>
- Step 2** – Within the Customer Portal, click on the Elite Education Services Hub link
- Step 3** – You will now be on the Elite Education Services Hub **Home Page**
- Step 4** – Click on **My Scheduled Calendar** on the Left Hand navigation Pane
- Step 5** – Click on the **enrolled class**
- Step 6** – Click on the **Launch icon**
- Step 7** – The WebEx session will launch
- Step 8** – The Audio Conference box will pop up
- Step 9** – Select “I will call in” from the drop down box



Please note: *WebEx details cannot be shared. They are unique to each enrolled participant*

If you have any questions, please contact Julie Sul at:
elite.education.services@thomsonreuters.com



Why Won't my Class Launch?

- **Your class will not launch in the Education Services Hub until the instructor has started the class**
- **Your system may not be allowing WebEx to launch.**
 - You may need to have your IT department allow this to be accessed
 - Please ensure you have done the test WebEx which is provided on the [System Requirements Page](#) within this document.
- **You may have pop-up blocker on, this might need to be turned off**
 - Check your Internet Browser Options
 - **Internet Explorer** – Go to Internet Options / Privacy / uncheck Turn on Pop-Up Blocker
 - **Mozilla FireFox** – Go to Firefox button / Options / Content Tab / Uncheck Pop-ups or Exceptions to add this site to the excepted sites
 - **Chrome** – Go to Chrome Menu on toolbar / Settings / Show Advanced Settings / In “Privacy” click the Content Settings button / In “Pop-ups” section select Manage Exceptions

