



TRIALWORKS

NOTICE

NEW ACCOUNT REQUEST FORMS

We have a new portal required for making any account requests or changes. The location of the new form is <https://www.trialworks.com/account-request-form/>. Please make sure all users who submit requests use this link. We no longer will be accepting the PDF form for the New Account Requests.



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Hosted Services Account Request Form

The completion of this form is required in order for you to request any changes to your account, including adding or removing users, changing email addresses, locking a user out or cancelling your service. Once payment has been processed, the form will be forwarded to the Technical Support Department and your request will be completed within 24 business hours. Please note: we will no longer accept any emailed versions of the Account Request Forms.

Firm Name: *

Account Number (if known):

Date of Request: *

Contact Name: *

ⓘ Please fill out all fields with the necessary information to process your request. Depending on what request you are making, additional fields will appear.

What change would you like to make?

- New Account (select to purchase a license for a new user)
- New Email Only Account (select to add a new email address only)
- Account Change (select to modify login name, email address and/or password)
- Account Cancellation (select to terminate an account)

- ⓘ **Once you have chosen and clicked on a radio button for your request, additional fields will appear which require additional information. Each click of a radio button presents new fields where information is required.**

Please select how you want us to handle the data during the replacement:

- New login account, new email account
- Rename login account, new email account
- Rename login account, rename email account

How would you like us to handle the data?

- Backup user files to Y drive
- Backup emails to Y drive
- Delete the old data

- ⓘ **Fields requesting email addresses will have a plus sign \oplus at the end of the field. Please click on this plus sign for each additional email address.**

How do you want to handle the old user's incoming email?

- Forward to the new user
- Forward to a different user (email address required)
- Forward to a group of users (distribution group, emails required)

Names of users for email to be forwarded to:

(Use \oplus sign to add more rows)

\oplus

- ⓘ **If you have any additional instructions with your request, please fill out the "anything else we should know?" section at the end of the form.**

Anything else we should know?

- ⓘ **Once the form has been completed, please hit **SUBMIT** and the form will be sent to the account department who will process your request.**

Submit