

Manage your subscription

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Using the customer portal

You can manage your subscription directly from within the [customer portal](#).[†] More specifically, you can:

- [Change your subscription plan or term](#)
- [Change the number of seats](#)
- [Change/update your card details](#)
- [Add a payment method \(card\)](#)
- [Change the card associated with a subscription](#)
- [Renew your subscription](#) or
- [Cancel your subscription](#).

If you run into any issues with managing your subscription through the portal, if your desired change to a new licencing solution cannot be achieved *via* the portal (e.g., you'd like to move to a floating licence, or you'd like to pay for a change using a direct bank transfer instead of a credit/debit card), or if you need any other kind of special assistance, just get in touch with our admin team directly at primer@primer-e.com and we will be happy to help.

[†]*Please contact us directly at primer@primer-e.com if you have a subscription but did not receive an invitation to the customer portal.*

Change your subscription plan

Ready for a change?

You may wish to change your subscription so as to achieve either:

- a '**step up**' (increasing entitlements, the number of seats or the length of your term); or
- a '**step down**' (decreasing entitlements, the number of seats or the length of your term).

In general, you can achieve any 'step-up' change:

- immediately *via* the [customer portal](#), or
- at the end of your current term, by contacting us at primer@primer-e.com.

Generally, a step-down change can only be implemented at the end of your subscription's current term, i.e., at renewal. If you wish to implement a step-down change, a change at the end of your current term, or any other change that you cannot achieve yourself in the customer portal, then get in touch with us directly at primer@primer-e.com.

'Step up' your current term and/or plan (with immediate effect)

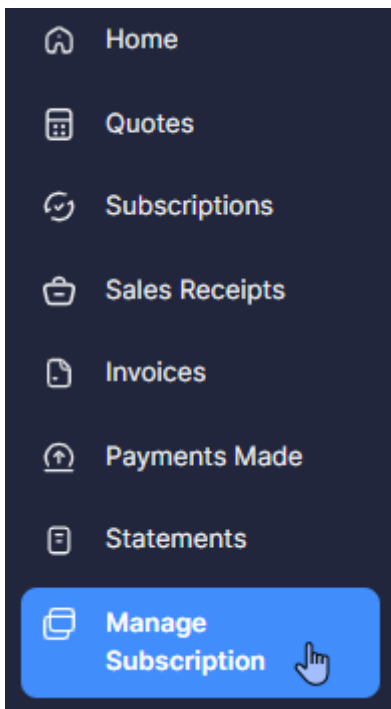
Sign in to PRIMER-e's [customer portal](#). You can:

- Change from **PRIMER 8 Lite** to $\rightarrow$ **PRIMER 8 with PERMANOVA+**; and/or
- Change your term from **12 months** (1 year) to $\rightarrow$ **36 months** (3 years).

In the portal, you will be shown all term/plan options that are available to you, given your current plan. Once you make your choice, the credit available from your current term/plan will be applied toward your new term/plan, and you will be issued with an invoice for the remainder. You can pay the invoice either immediately *via* a credit/debit card associated with your subscription, or *via* any payment method shown on our invoice. *(Note: if you have a card associated with your subscription, then the payment will be made on this card automatically when you confirm the change.)*

Once your invoice has been paid, the change to your subscription will take effect immediately and an email will be sent to you confirming this. Your subscription number, licence key and serial number remain the same, and there is no need to uninstall/re-install the software itself. However, you will need to [re-activate the licence key](#) for your new term/plan and its associated entitlements to occur.

1. Click on '**Manage Subscription**' (listed in the left-hand panel):



Enter your email address into the box and click '**Continue**'.



Manage Subscription

Enter your email address to view and manage your subscriptions

Continue → 

You will see a list of all your current subscriptions, like so:

My Subscriptions

View your current subscription details and make changes below.

If you choose to change your subscription, the change will take effect immediately upon payment, and a confirmation email will be sent to you.

 [View My Profile](#)

Your Subscriptions

Total: 1 Active: 1

SUBS-00418 PRIMER 8 Lite (12-month subscription)

1 seat

Active

- Click on the name (shown in lavender on the left) of the specific subscription you wish to change (e.g., 'SUBS-00418'). This will take you to more information about that particular subscription further down on the page.

PRIMER Software - PRIMER 8 Lite (12-month subscription)

CURRENT SUBSCRIPTION DETAILS

Subscription Number	SUBS-00418	Current Plan	PRIMER 8 Lite (12-month subscription) USD 
Current Number of Seats	1	Billing Cycle	1 Year
Started On	May 25, 2026	Next Billing Date	May 25, 2027

Under this information, you will see a section labeled '**Change your subscription**', which includes a drop-down menu. Click on this and you will see all of the 'step-up' plans available to you, along with their price per term. Simply select the plan of your choice. For example, we might choose to add PERMANOVA+ to our current plan (but stick with a 12-month term), so we would choose: 'PRIMER 8 with PERMANOVA+ (12-month subscription)', as shown below:

CHANGE YOUR SUBSCRIPTION

Change your Plan to:

PRIMER 8 Lite (12-month subscription) - USD 

PRIMER 8 Lite (12-month subscription) - USD 

PRIMER 8 with PERMANOVA+ (12-month subscription) - USD 

PRIMER 8 Lite (36-month subscription) - USD 

PRIMER 8 with PERMANOVA+ (36-month subscription) - USD 

- If you have a coupon, enter the coupon code where it says '**Add Coupon**' and click '**Apply**'. *(Note: if you have an existing coupon that is already associated with your subscription and it can be applied in this situation, then it will automatically show up here, and you can choose whether or not to apply it.)

Add Coupon:

Enter coupon code

Apply Coupon

4. Check the details associated with this change, including the additional payment required.

Subtotal

USD

Immediate Charges

USD

Next billing:

Recurring Charges

USD

If you choose to change your subscription, the change will take effect immediately upon payment, and a confirmation email will be sent to you.

Change Subscription

Note that:

- To make your changes you will have to pay for the differential amount. You will be sent an invoice directly.
- Auto-charge will be enabled for this subscription if you use a payment method that supports recurring payments (i.e., if you have a debit or credit card associated with this subscription).

If all the details showing are correct and you are happy to proceed (making sure to include your coupon code, if any), then click '**Change Subscription**' at the bottom of the window.

6. A '**Confirm Change**' window will be shown to you, including a summary of the changes requested and details of the immediate charges.



Confirm Change

CONFIRMATION OF CHANGE

CHANGES SUMMARY

PRIMER 8 Lite (12-month subscription) → PRIMER 8 with PERMANOVA+ (12-month subscription)

CHARGES

Immediate Charges: USD

Do you want to proceed?

☐

Cancel

Confirm Changes

Click '**Confirm Changes**' to make the change.

Upon successful completion of the above steps, you will receive an email confirming the change(s) to your subscription plan. The change will take place immediately upon payment, and your licence key will reflect this change in your entitlements right away.

Important: Your current licence key remains the same, but *you will need to [re-authenticate the software](#) for this change to take effect.*

'Step down' your current term and/or plan

At some point, you may decide you wish to '**step down**' your current plan and/or term in some way, e.g.:

- Change from **PRIMER 8 with PERMANOVA+** to $\rightarrow$ **PRIMER 8 Lite**; and/or
- Change your term from **36 months** (3 years) to $\rightarrow$ **12 months** (1 year).

You cannot make this type of change directly in the customer portal. You will need to contact us at primer@primer-e.com and describe the specific change(s) you want and we will be happy to help. When the change has been made, you will receive an email confirming that your request has been documented and that *this change will be implemented upon renewal of your subscription*. Your invoice/payment due at that time will reflect this change. Note that:

- Your current licence key remains the same and will not reflect the change until the end of your current term, i.e. at *renewal*.
- You will still have access to all the entitlements and features of your current plan, until the end of your current subscription period.

Change the number of seats

Need more seats?

You can **increase** the number of seats:

- immediately *via* the [customer portal](#), or
- at the end of your current term, by contacting us at primer@primer-e.com.

You can only **decrease the number of seats** at the end of your subscription's current term, i.e., at renewal. If you wish to decrease the number of seats, then get in touch with us directly at primer@primer-e.com and we will be happy to help.

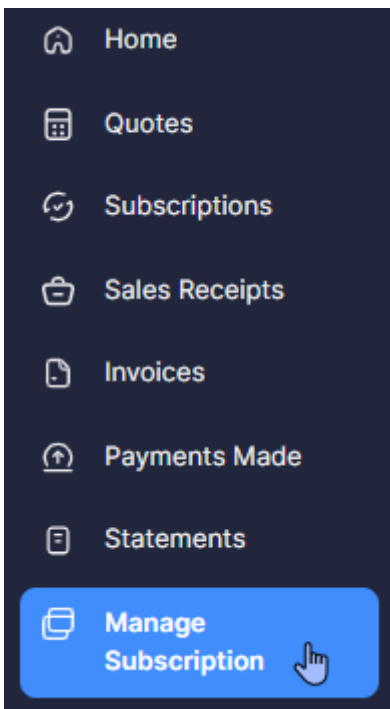
Increase the number of seats (with immediate effect)

1. Sign in to PRIMER-e's [customer portal](#).

In the portal, you will be able to increase the number of seats. Once you make your choice, the credit available from your current plan will be applied toward your new plan having more seats, and you will be issued with an invoice for the remainder. You can pay the invoice either immediately *via* a credit/debit card associated with your subscription, or *via* any payment method shown on our invoice. (*Note: if you have a card associated with your subscription, then the payment will be made on this card automatically when you confirm the change.*)

Once your invoice has been paid, the change to your subscription will take effect immediately and an email will be sent to you confirming this. Your subscription number, licence key and serial number remain the same, and there is no need to uninstall/re-install the software itself. The software will be able to be installed and licence activated on the additional number of machines (seats) you have purchased.

2. Click on '**Manage Subscription**' (listed in the left-hand panel).



(You may need to enter your email address and click '**Continue**' at this point).

3. Click on the name (shown in lavender) of the specific subscription you wish to change (e.g., 'SUBS-00418'). This will take you to that particular subscription on the page.

 **PRIMER Software - PRIMER 8 with PERMANOVA+ (12-month subscription)**

 **CURRENT SUBSCRIPTION DETAILS**

Subscription Number	SUBS-00418	Current Plan	PRIMER 8 with PERMANOVA+ (12-month subscription) USD 
Current Number of Seats	1	Billing Cycle	1 Year
Started On	May 25, 2026	Next Billing Date	May 25, 2027

Under this information, you will see a section labeled '**Change your Number of Seats to:**' with a drop-down menu. Click on this and select the number of seats you want to change to. For example, we might choose to go from 1 to 2 seats, as shown below:

 **CHANGE YOUR SUBSCRIPTION**

Change your Plan to:

PRIMER 8 with PERMANOVA+ (12-month subscription) - USD  

Change your Number of Seats to:

2 



4. If you have a coupon, enter the coupon code where it says '**Add Coupon**' and click '**Apply**'. *(Note: if you have an existing coupon that is already associated with your subscription and it can be applied in this situation, then it will automatically show up here, and you can choose whether or not to apply it.)

Add Coupon:

Apply Coupon

5. Check the details associated with this change, including the additional payment required.

Subtotal

USD

⚡ Immediate Charges

USD

Next billing:

Recurring Charges

USD

If you choose to change your subscription, the change will take effect immediately upon payment, and a confirmation email will be sent to you.

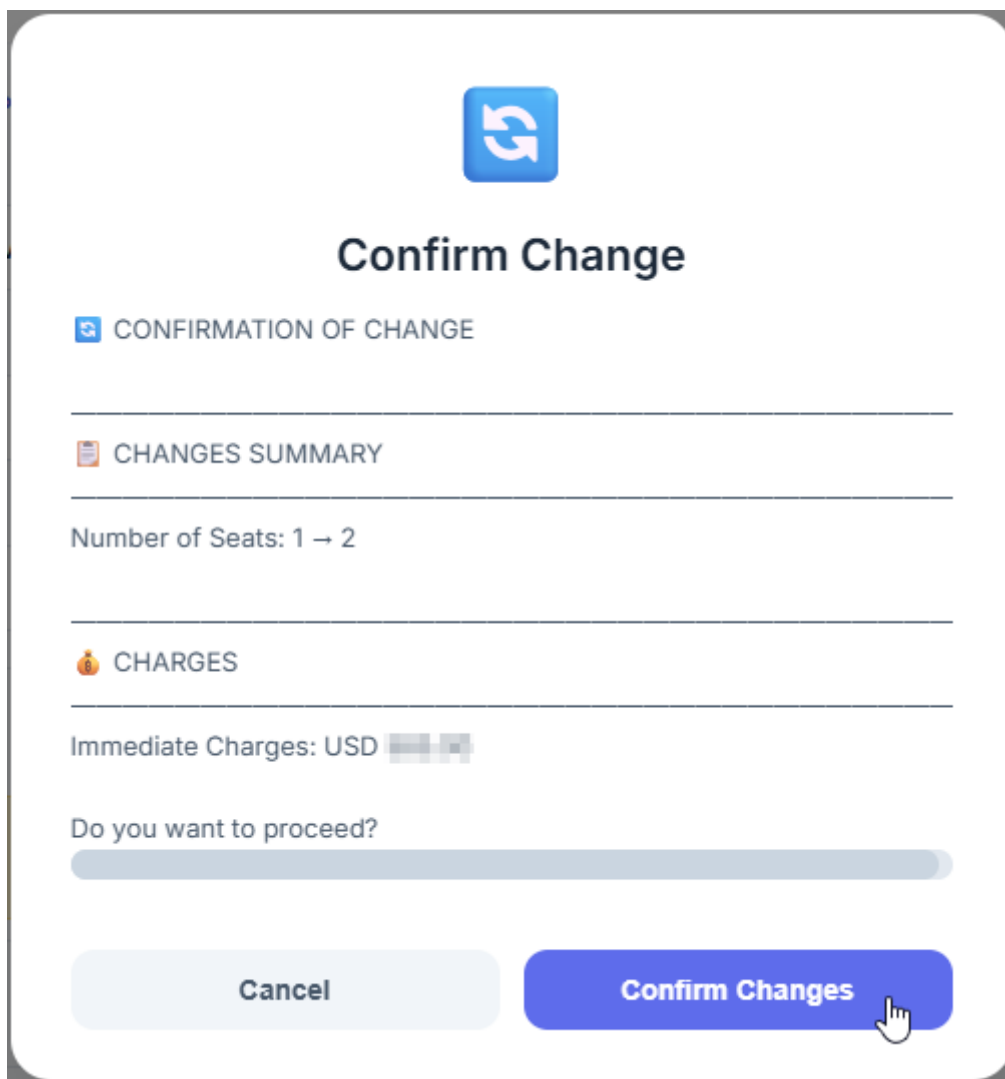
Change Subscription

Note that:

- To make your changes you will have to pay for the differential amount. You will be sent an invoice directly.
- Auto-charge will be enabled for this subscription if you use a payment method that supports recurring payments (i.e., if you have a debit or credit card associated with this subscription).

If all the details showing are correct and you are happy to proceed (making sure to include your coupon code, if any), then click '**Change Subscription**' at the bottom of the window.

6. Next, a '**Confirm Change**' window will be shown to you, including a summary of the change(s) requested and details of the immediate charges.



The image shows a 'Confirm Change' dialog box with a blue header bar. At the top center is a blue square icon with a white circular arrow. Below the header, the title 'Confirm Change' is centered in a bold, dark font. The dialog is divided into sections by horizontal lines. The first section is titled 'CONFIRMATION OF CHANGE' with a small blue icon. The second section is titled 'CHANGES SUMMARY' with a small orange icon; it displays 'Number of Seats: 1 → 2'. The third section is titled 'CHARGES' with a small orange icon; it displays 'Immediate Charges: USD' followed by a blurred amount. Below these sections is a question 'Do you want to proceed?' with a light blue progress bar. At the bottom are two buttons: a light blue 'Cancel' button and a blue 'Confirm Changes' button. A hand cursor icon is positioned over the 'Confirm Changes' button.

Confirm Change

CONFIRMATION OF CHANGE

CHANGES SUMMARY

Number of Seats: 1 → 2

CHARGES

Immediate Charges: USD [blurred]

Do you want to proceed?

Cancel **Confirm Changes**

Click '**Confirm Changes**' to make the change.

Upon successful completion of the above steps, you will receive an email confirming the change(s) in the number of seats for your subscription plan. Your licence key will remain the same, but post-payment it will reflect this change in your entitlements right away, permitting you to install and activate your software on more devices, in accordance with the number of seats you have chosen to purchase for your subscription.

Decrease the number of seats

You cannot decrease the number of seats directly in the customer portal. You will need to contact us at primer@primer-e.com and tell us what you'd like to do and we will be happy to help. When the change has been made, you will receive an email confirming that your request has been documented and that *this change will be implemented upon renewal of your subscription*. Your invoice/payment due at that time will reflect this change.

Note that:

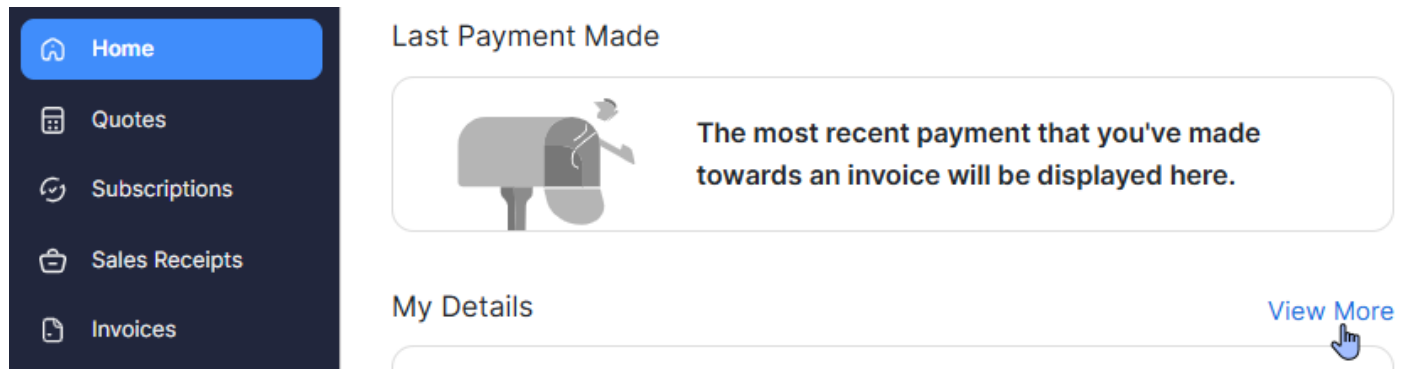
- Your current licence key will remain the same.

- You will still have access to the full number of seats associated with your current plan until the end of your current subscription period.

Change/update your card details

If you have paid for your initial subscription *via* our website using credit or debit card, then that card's details can be kept in the system as the payment method associated with your subscription, and used for future renewals. You can change/update the details of the card (e.g., to alter the expiry date) as follows.

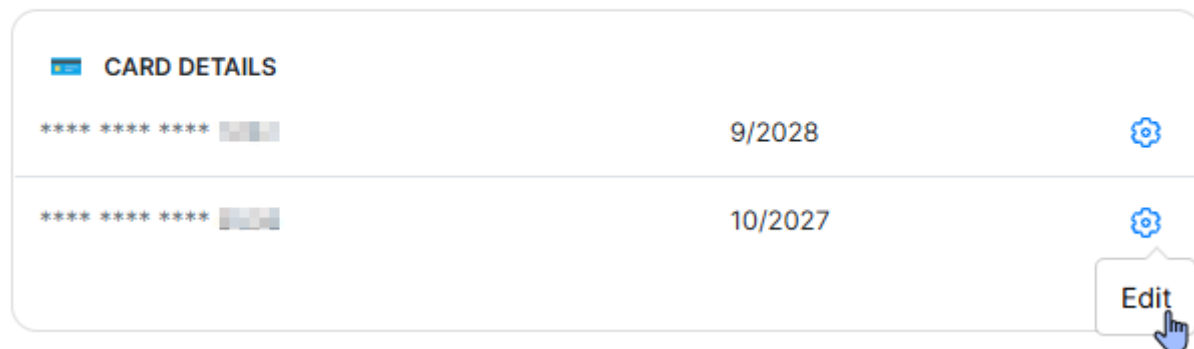
1. On the 'Home' page in the customer portal, look on the right-hand side of the section entitled 'My Details', and click '**View More**'



2. You will see all of the cards currently held in your account in the customer portal. Click on the small blue cog (⚙️) located to the right of the card whose details you wish to alter.

Payment Details

[+ Add Payment Method](#)



3. In the form that pops up, edit the card details with up-to-date information, as required, and click '**Save**'.

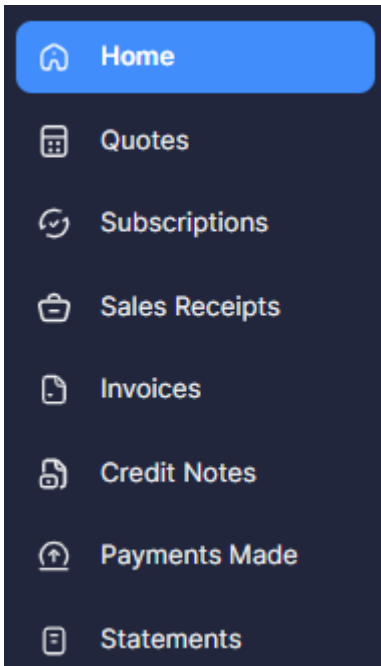
Save

Your card details will then be up to date.

Add a payment method

You can add one or more payment methods (debit or credit cards) to your account in the customer portal. Follow the instructions below to add a payment method.

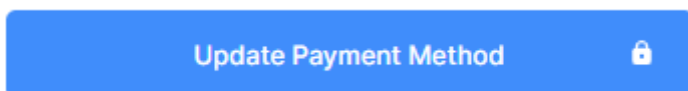
1. In the [customer portal](#), make sure you are on the 'Home' page:



2. In the section entitled 'My Details' (located at the bottom left of the 'Home' page), you will be able to see all cards currently held in the system for you. Under these details, click on '**Add Payment Method**'.

[+ Add Payment Method](#)

3. Fill in the details of the card you want to add and click the button to '**Update Payment Method**'.

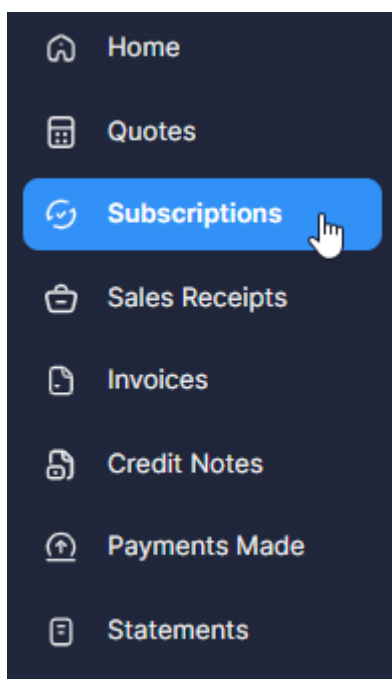


Note that simply adding a card to the customer portal will not automatically associate it with (any of) your current subscription(s). However, once the card has been added to your account in the portal, you can then easily [change the card associated with a particular subscription](#).

Change the card associated with a subscription

First, ensure the card you want to associate with your subscription [has been added](#) to your account in the [customer portal](#). Then, to change the card associated with a particular subscription, follow the steps below.

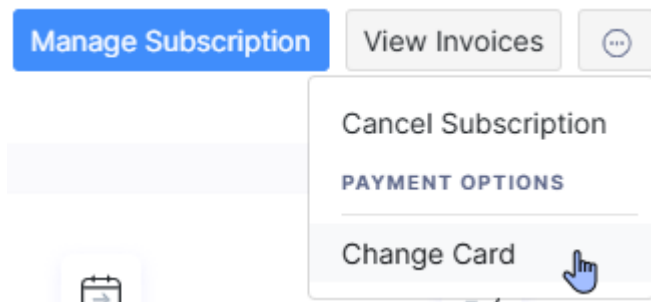
1. Click on '**Subscriptions**' (listed in the left-hand panel in the [customer portal](#)).



2. Click on the name (in blue) of the specific subscription item ('**PRIMER Software**') for which you wish to change the card.



3. Click the 3 dots at the top right-hand side of the page, then click '**Change Card**'.



- Put a tick next to the card you want to associate with this particular subscription for renewal payments, then click '**Save**'.

Change Card

Product Name : PRIMER Software Plan : PRIMER 8 Lite (12-month subscription)

Available Card(s)

☐	 **** * Expires on: More Details ▶	ASSOCIATED
☒	 **** * Expires on: More Details ▶	

Save

Cancel

Once you have associated a card with a subscription, the word 'Associated' (in green) will appear next to that card's details to indicate this: ASSOCIATED .

Renew your subscription

When it is time to renew your subscription, you will receive:

- a renewal reminder by email, including an invoice for payment, **35 days** prior to the end of your subscription period; and
- a second renewal reminder by email **10 days** prior to the end of your subscription period.

Your subscription will be renewed upon payment of our invoice.

If you have paid for your initial subscription *via* our website using a credit or debit card, your card details have been retained by our system and associated with your subscription for auto-payment at the time of renewal. You can see the [card associated with your subscription](#) in the [customer portal](#). If your card has expired, then you will need to [update your card details](#). You can review our [Privacy Policy](#) for details regarding our use of any information you provide to us.

If you have paid for your initial subscription *via* a link on your invoice and chose not to associate your card details, or you did not paid by card, but would now like to pay for your renewal using a credit or debit card, you can [add a credit/debit card payment method](#) in the customer portal. You will then need to [associate that card with your subscription](#). Once a card is associated with your subscription, it will then be used to renew your subscription automatically at the time of renewal.

You can alternatively pay for your renewal invoice using a direct bank transfer, using the details specified on the invoice.

Provided payment of the invoice for renewal is made prior to the end of your current subscription period, then your subscription plan will be renewed. Your licence key will remain the same and there will be no need to re-install or re-authenticate the software upon renewal. Please refer to our [EULA](#) for further details.