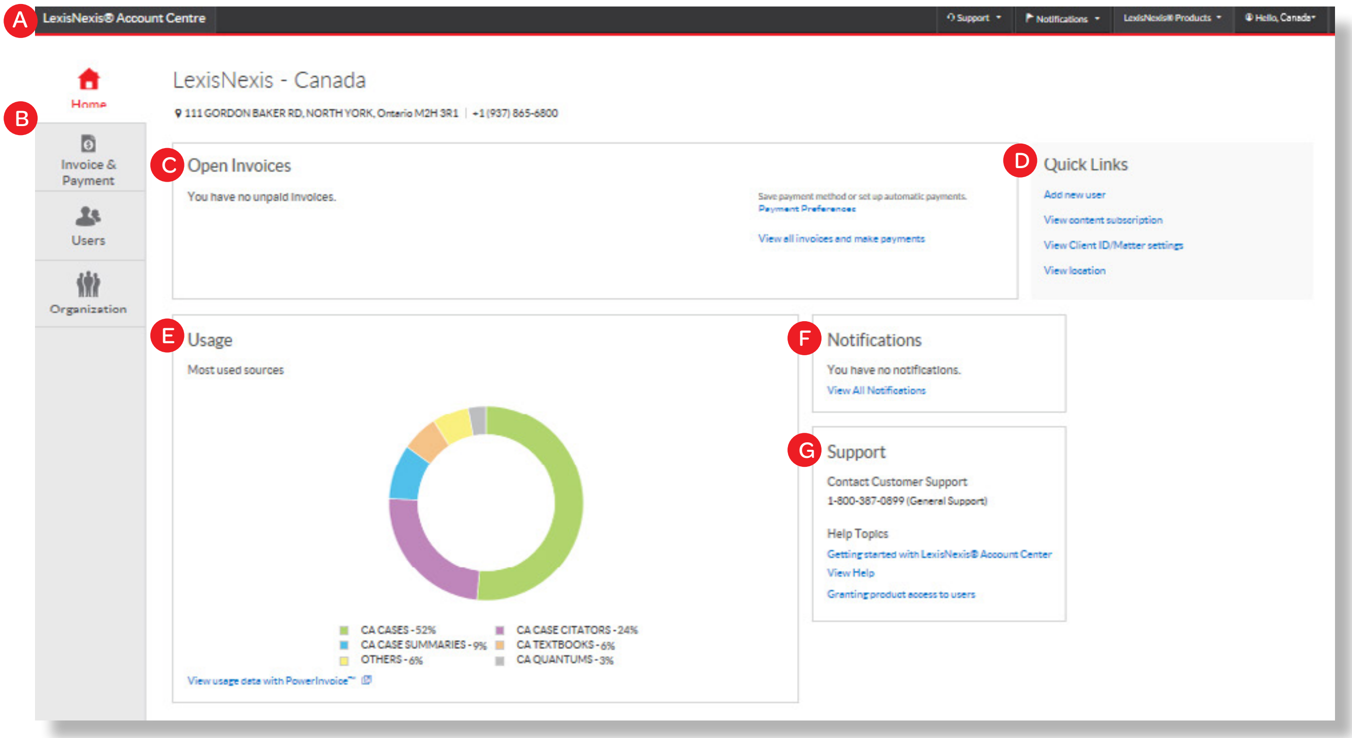
LEXISNEXIS® ACCOUNT CENTRE QUICK REFERENCE GUIDE

This guide shows you where to find—and how to use—LexisNexis Account Centre features you'll use often. Keep this guide handy for reference.

Contents

*Please note: All screens shown may change slightly as new sources, features and enhancements are added. Please contact your Account Rep with any questions.

Getting Started: Home



The LexisNexis Account Centre home page gives you access to all your account tasks, plus at-a-glance information about important areas of your account.

- **A** The global **Navigation Bar** provides access to Support options, Notifications, LexisNexis Products, and Sign in Profile options
- **B** The left **Navigation Bar** provides access to invoices and payments, users, and organization information.
- **C** The **Open Invoices** pod provides access to pay an invoice, review open invoices, or set up payment preferences such as a credit card or bank account.
- **D** The **Quick Links** pod on the right side of the page provides quick access to frequently-used tasks.
- **E** The **Usage** pod graphically depicts the most used content types and includes the option to **view usage data within PowerInvoice**.
- **F** **Notifications**. The administrator will receive notification for changes to payment information such as delete credit card, delete bank account, update credit card and update bank account.
- **G** The **Support** pod contains options for contacting Customer Support as well as **Help topics** and **online tutorials**.

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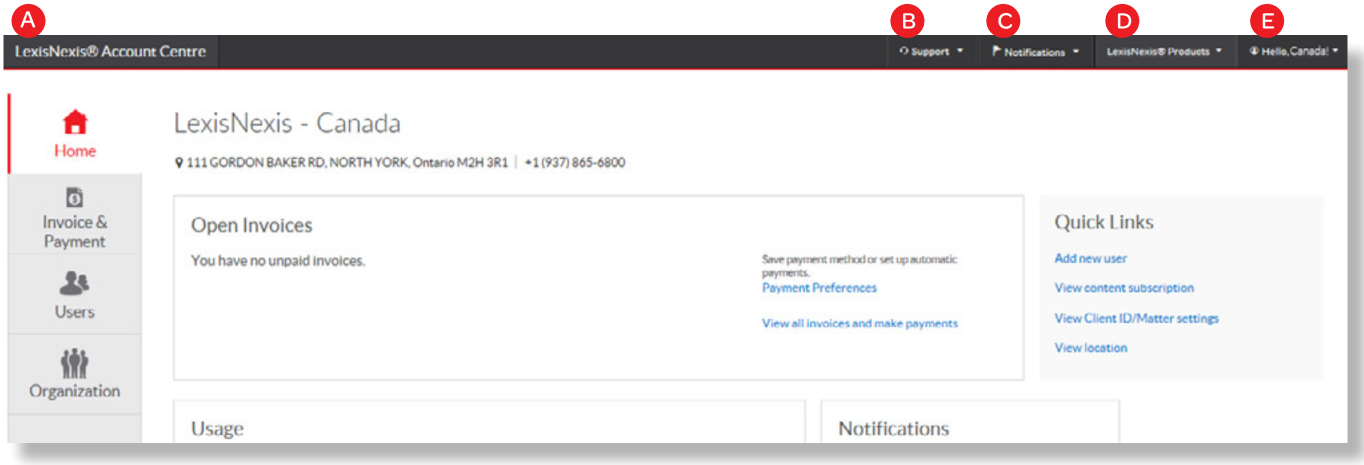
Getting Started: Global Navigation Bar



- A **LexisNexis Account Centre**. Click to return to the LexisNexis Account Centre Home page.
- B **Support**. Click the drop-down menu to view the Customer Support phone number, access Help screens, and provide feedback or suggestions.
- C **Notifications**. The administrator will receive notification for changes to payment information such as delete credit card, delete bank account, update credit card and update bank account.
- D **LexisNexis Canada Products**. Click the drop-down menu to access additional products.
- E **Hello, admin!** Click the drop-down to edit profile information and sign out.

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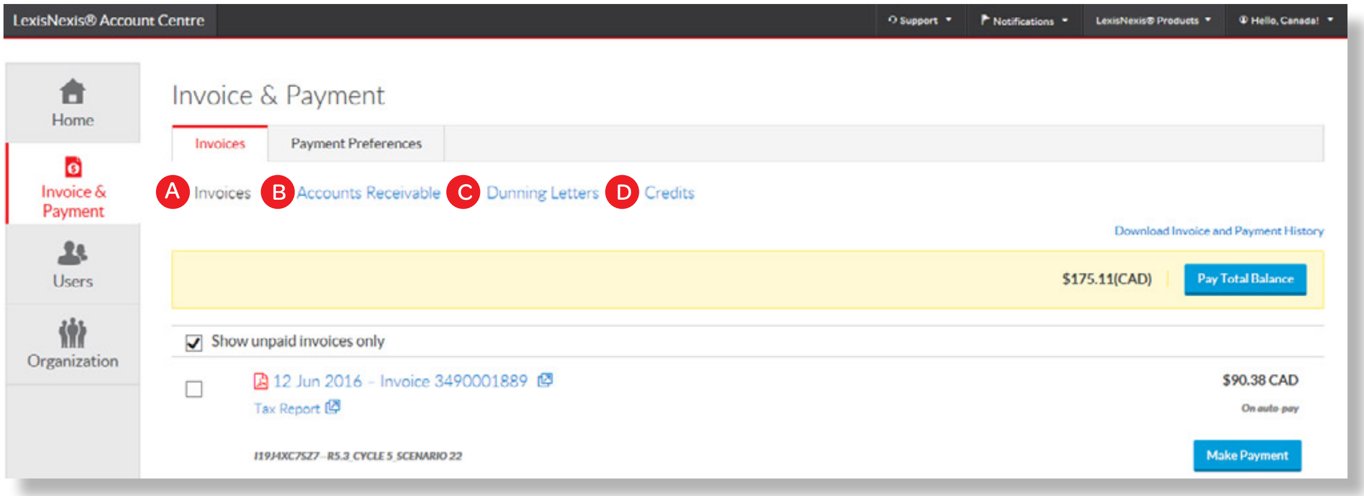
Invoice & Payments

Accessing Invoice & Payments

This information can be accessed through the Open Invoices pod or from the Invoice & Payments tab on the left navigation bar.



A **Invoices**. Use this page to view your invoices, view or print a PDF of an invoice or tax statement, and make payments.

B **Accounts Receivable**. This page allows you to view or print accounts receivable statements. You may also request an accounts receivable statement here.

C **Dunning Letters**. Use this page to view or print Dunning Letters for your account.

D **Credits**. View or print credit memos for your account.

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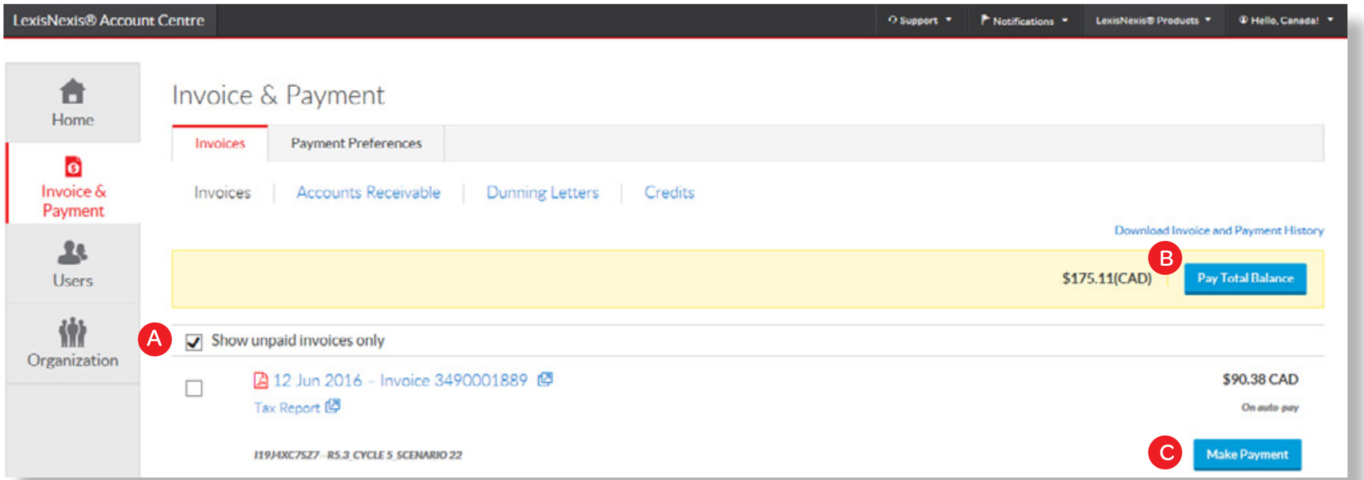
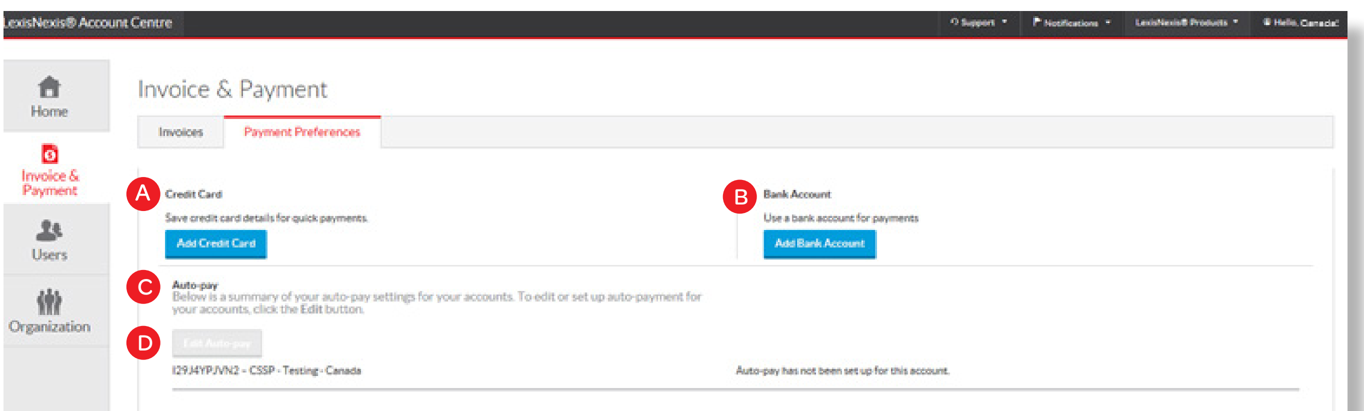
Invoice and Payments: Invoices



A **Show unpaid invoices only**. Select this checkbox to see only open invoices.

B **Pay Total Balance**. Select this button to pay the entire amount owed for this account.

C **Make Payment**. Select this button to pay specific invoices or multiple invoices.



Use this page to save a credit card or bank account to use when paying invoices, or to set up automatic payments.

A **Credit Card**. Select this to save or edit a credit card for making payments.

B **Bank Account**. Select this option to save or edit a bank account for making payments.

C **Auto-pay**. View summary of auto-pay settings for your account.

D **Edit auto-pay**. Click this button to edit or set up auto-payment for your account.

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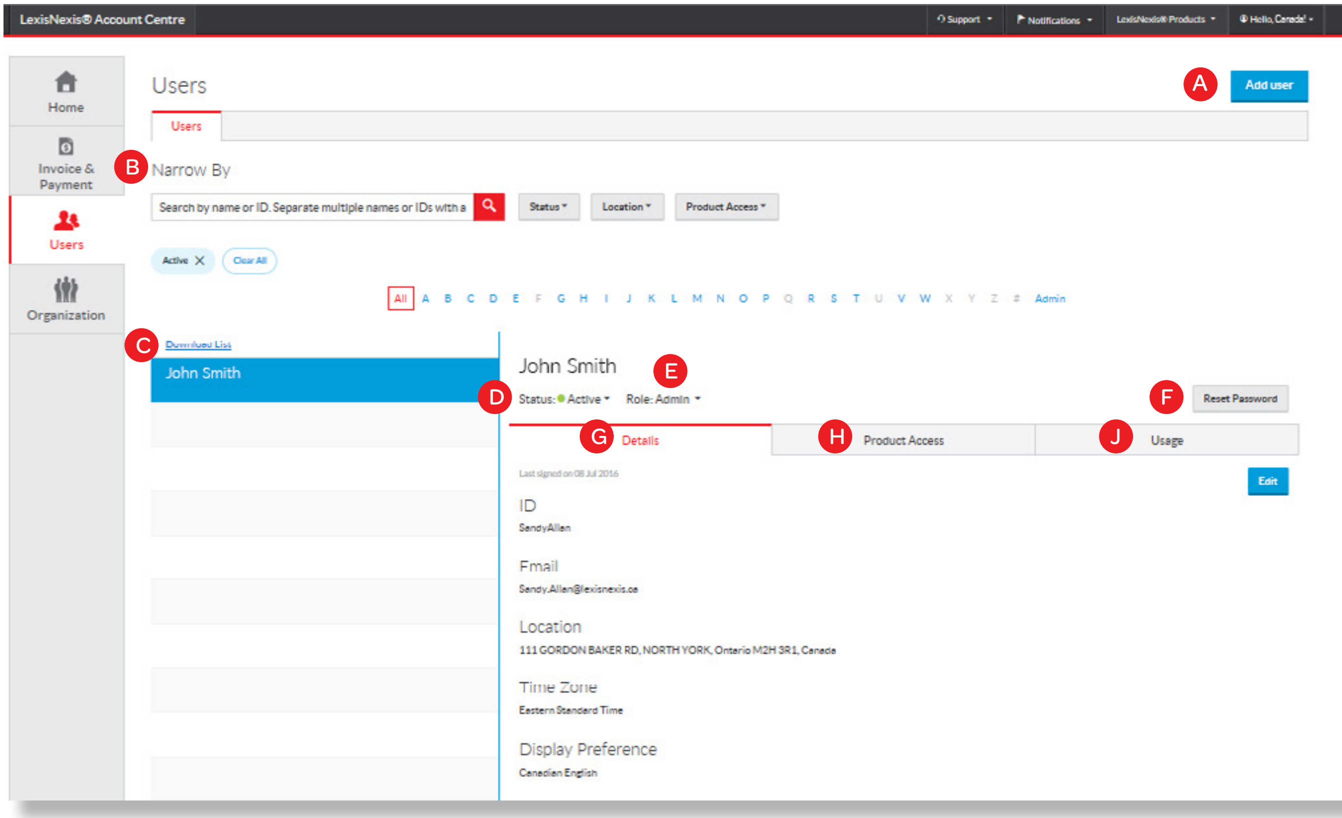
Users



Use this page to manage users within your organization.

- **A** **Add User**. Select this to add a new user to your organization.
- **B** **Narrow By**. Search by name or ID. Use one or more of the filters in this area to narrow your search.
- **C** **Download List**. Select this to download the complete list of users.
- **D** **Status**. Select this drop-down list to change the status.
- **E** **Role**. Select this drop-down to change user's role. Choices include end user and admin.
- **F** **Reset Password**. Select this to issue the user a temporary password.
- **G** **Details**. Select this tab to view and edit the general information for the user.
- **H** **Product Access**. Select this tab to view and edit the user's product access.
- **I** **Public Records**. Select this tab to view and edit the user's public records access.
- **J** **Usage**. Select this tab to display usage information for the user.

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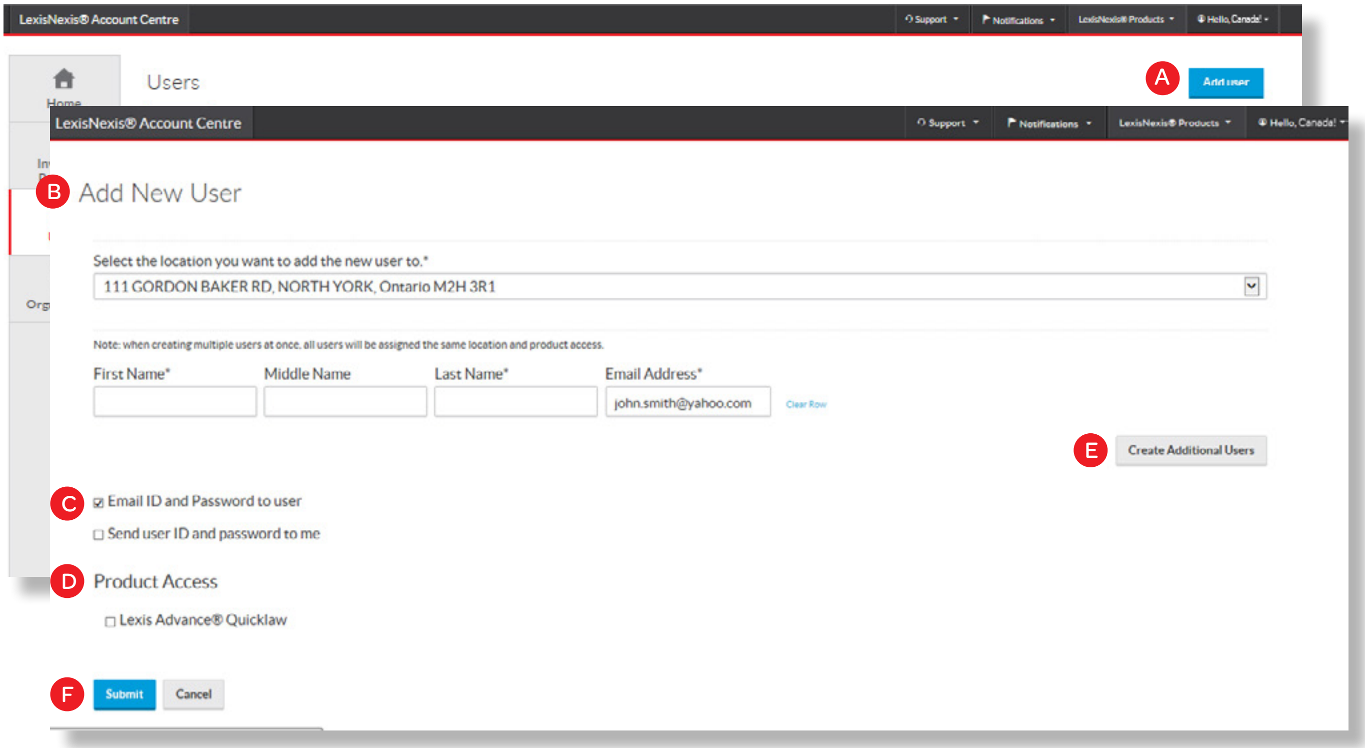
Users: Add User



A Click the Add User button.

B Insert required information (identified by an asterisk).

C Select desired **deliver option**. By selecting either of these, an email will be sent to the selected party. You are not required to select a box. This ID and temporary password will be displayed on the confirmation screen.

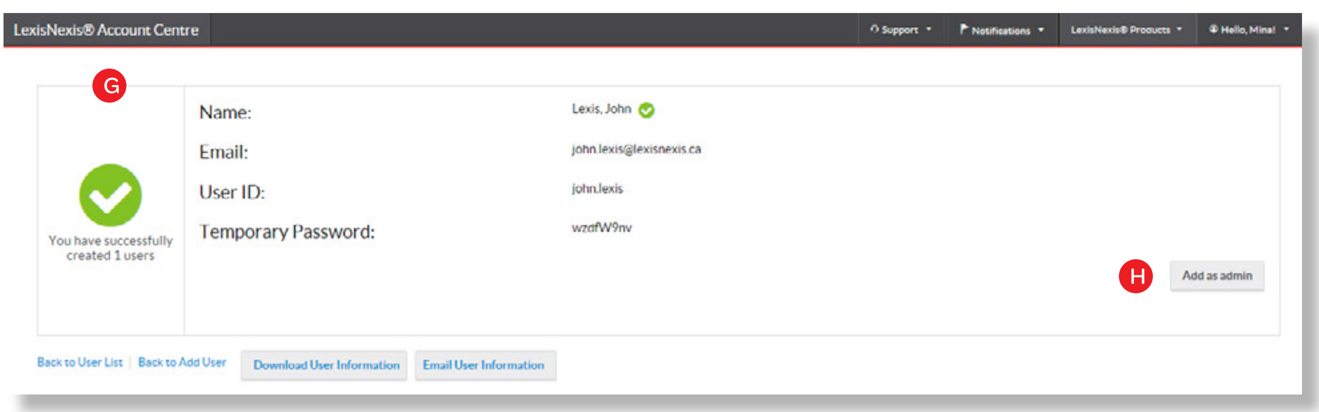
D Insert check mark next to desired **Product Access**.

E To create additional users, Click the **Create Additional Users** button.

F Click **Submit**.

G **Confirmation Screen**. This screen instantly provides the created user's ID and temporary password, which can be downloaded or emailed to the administrator.

H **Add as admin**. Click this button to allow the end user to be created as an administrator.



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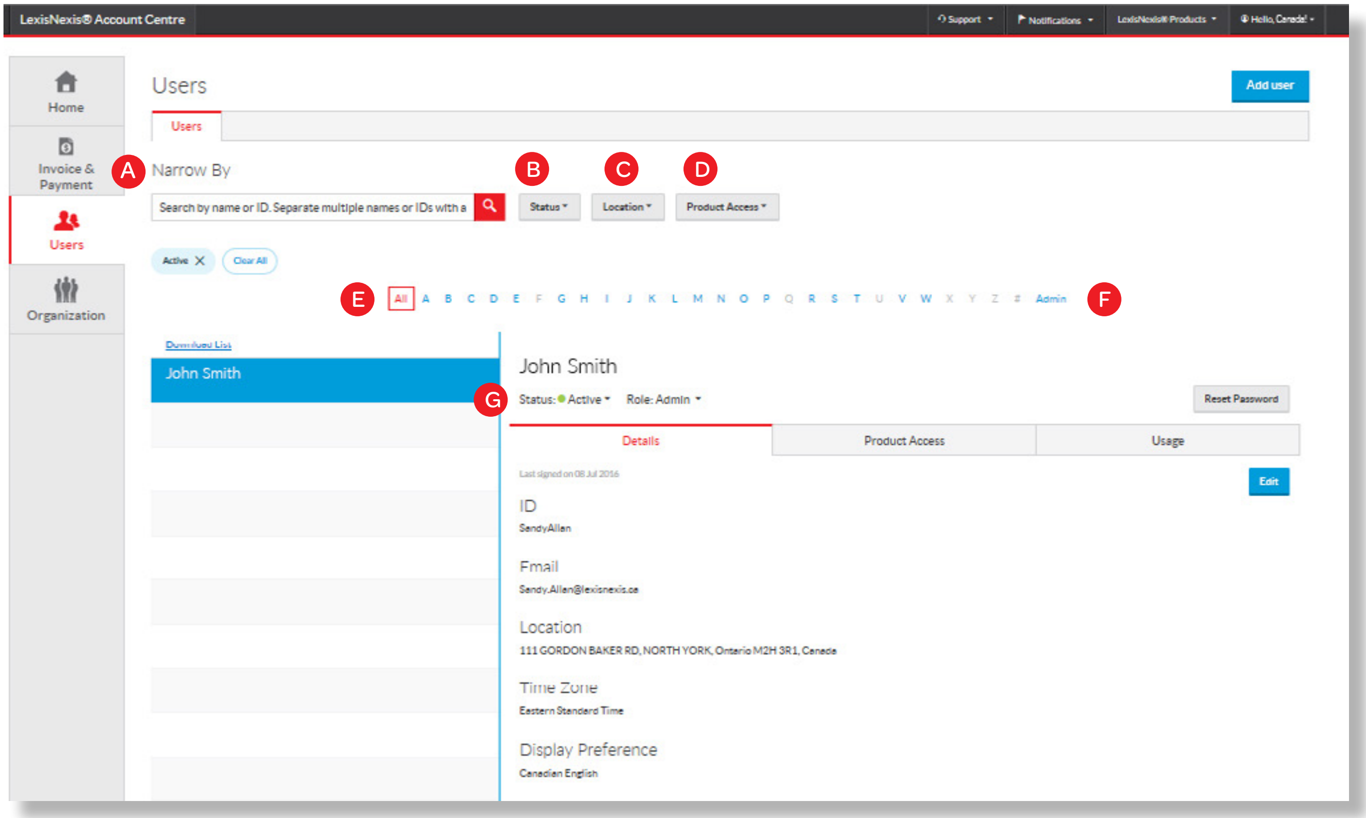
Users: Narrow By



A **Search by Name or ID**. Enter the name or user ID of the user whose information you want to find. Separate multiple names or IDs with a semicolon.

B **Status**. Select from this drop-down to narrow your search to users with a specific status (active, suspended, or deleted).

C **Location**. Select from the location pull-down filter to narrow your search to users at a specific location.

D **Product Access**. Select from the product access pull-down filter to narrow your search to users who do or do not have access to specific products.

E **All/A..Z**. Use the alphabet list to filter on the user's last initial.

F **Admins**. Select this button to display a list of users who are administrators.

G **Active users**. The list is defaulted to view only users with active status.

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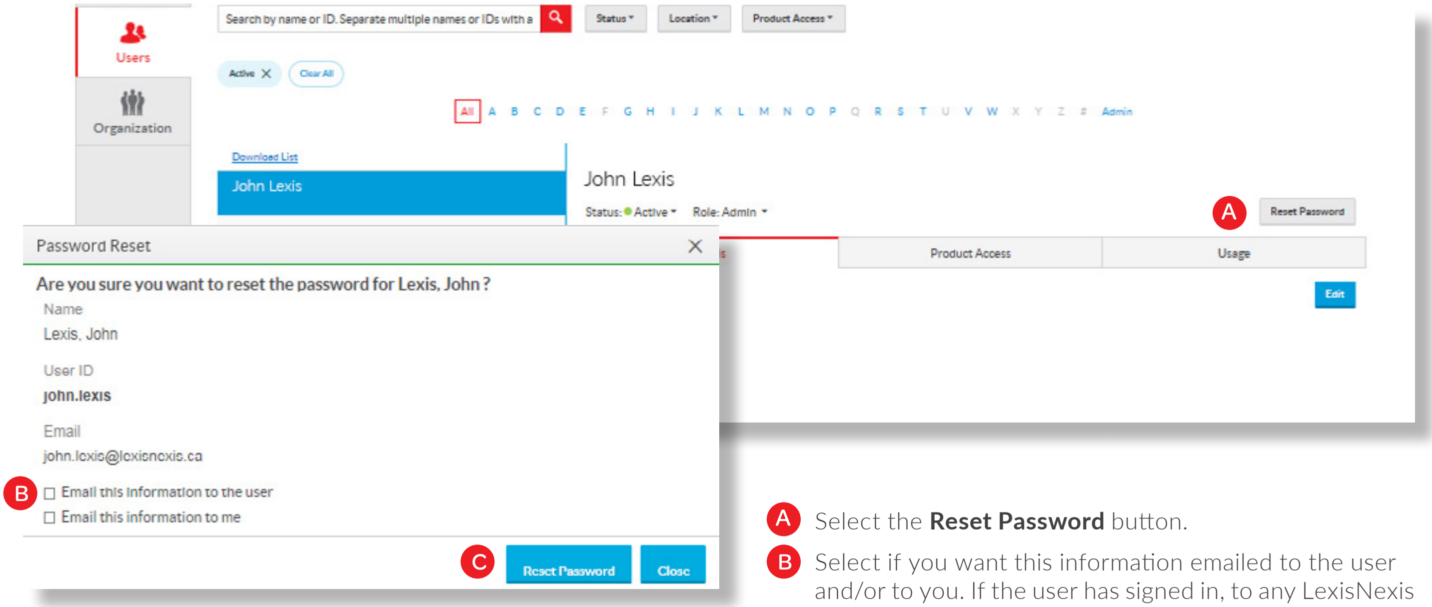
Users: Reset Password

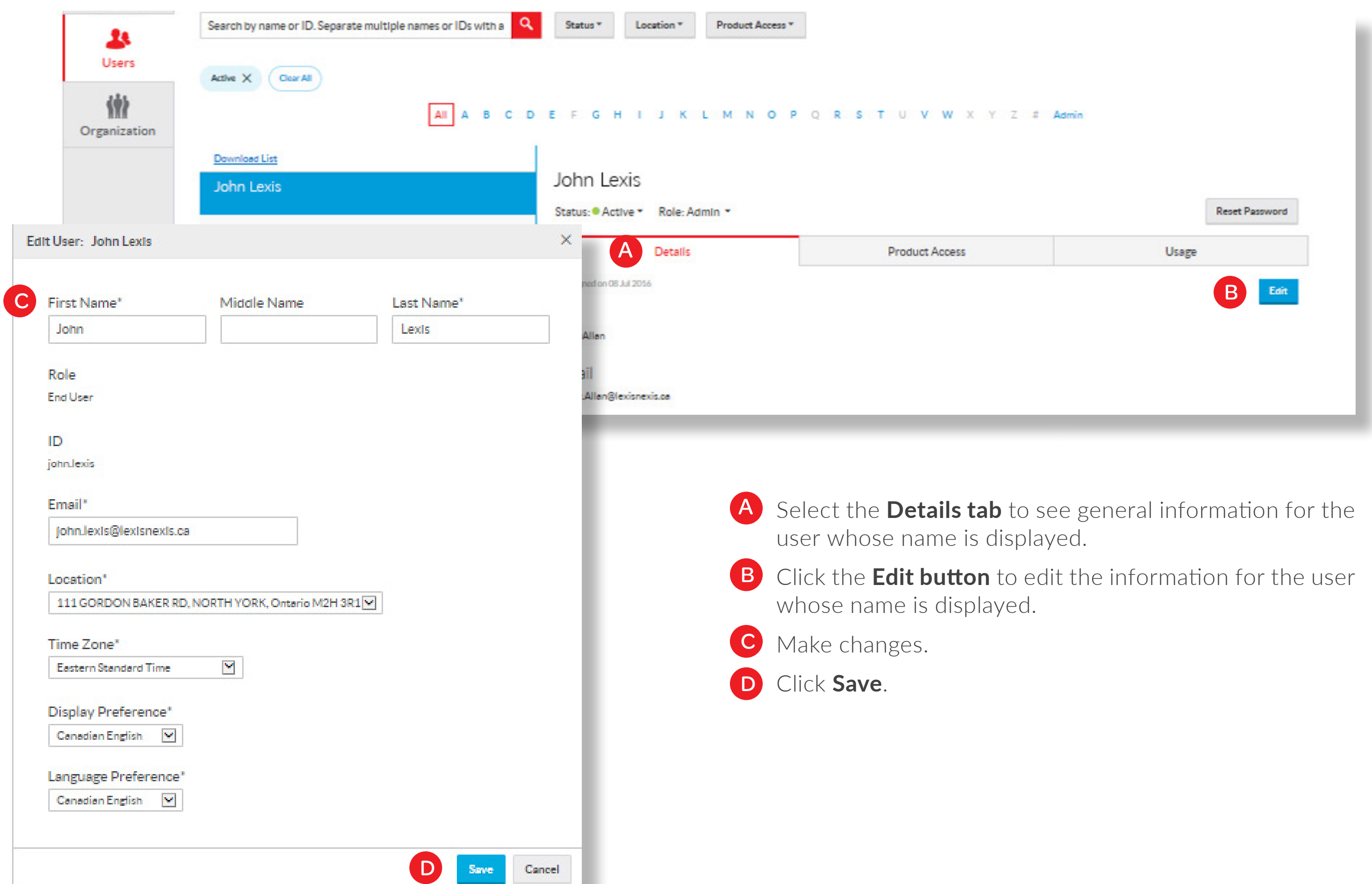


A Select the **Reset Password** button.

B Select if you want this information emailed to the user and/or to you. If the user has signed in, to any LexisNexis research product, you will not have the option to supress the email to the user.

C Click **Reset Password**. The user's ID and temporary password will then display.

Users: Edit User Details



A Select the **Details tab** to see general information for the user whose name is displayed.

B Click the **Edit button** to edit the information for the user whose name is displayed.

C Make changes.

D Click **Save**.

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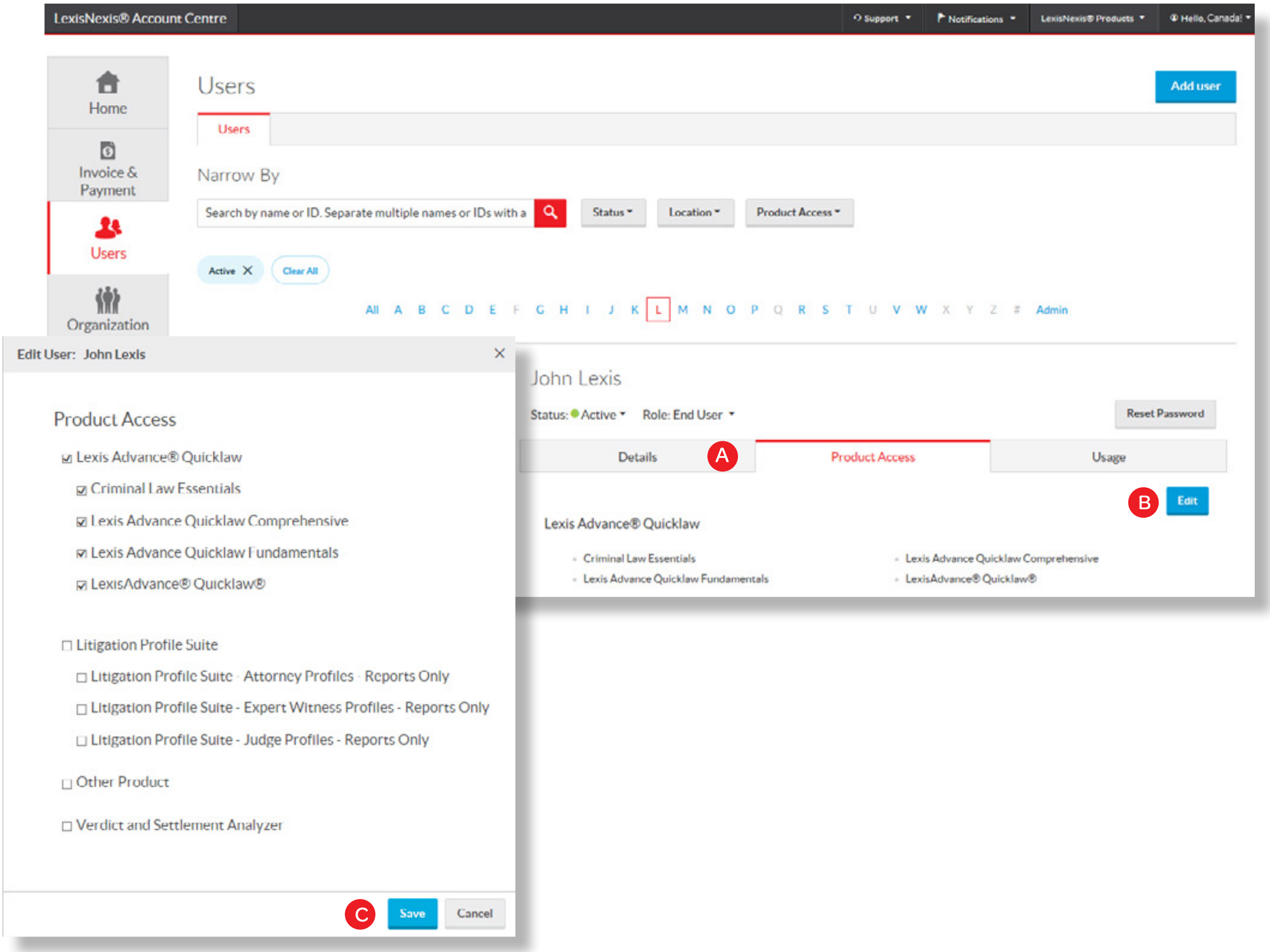
Users: Product Access



Ⓐ **Product Access**. Select this tab to see the products that the user whose name is displayed has access to.

Ⓑ **Edit button**. Select this to edit product access for the user whose name is displayed.

Ⓒ Make desired changes using the checkboxes and then click **Save**.

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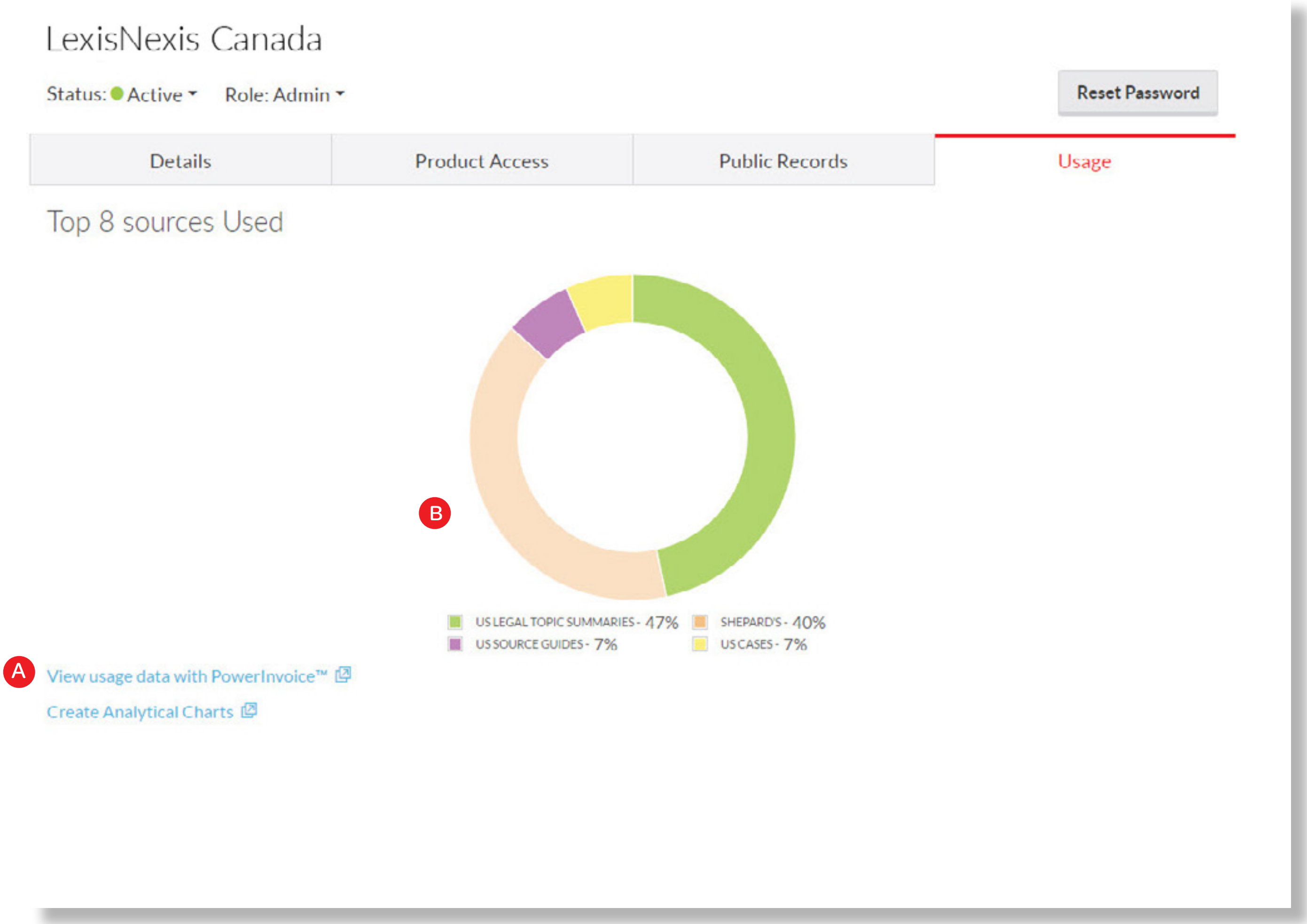
Users: Usage



Select this tab to see usage information for the user whose name is displayed.

A **View usage data with PowerInvoice**. This hyperlink will take you directly to PowerInvoice for detailed usage data.

B **Usage Graph**. This provides a visual representation of usage per the most-used content types along with percentages.

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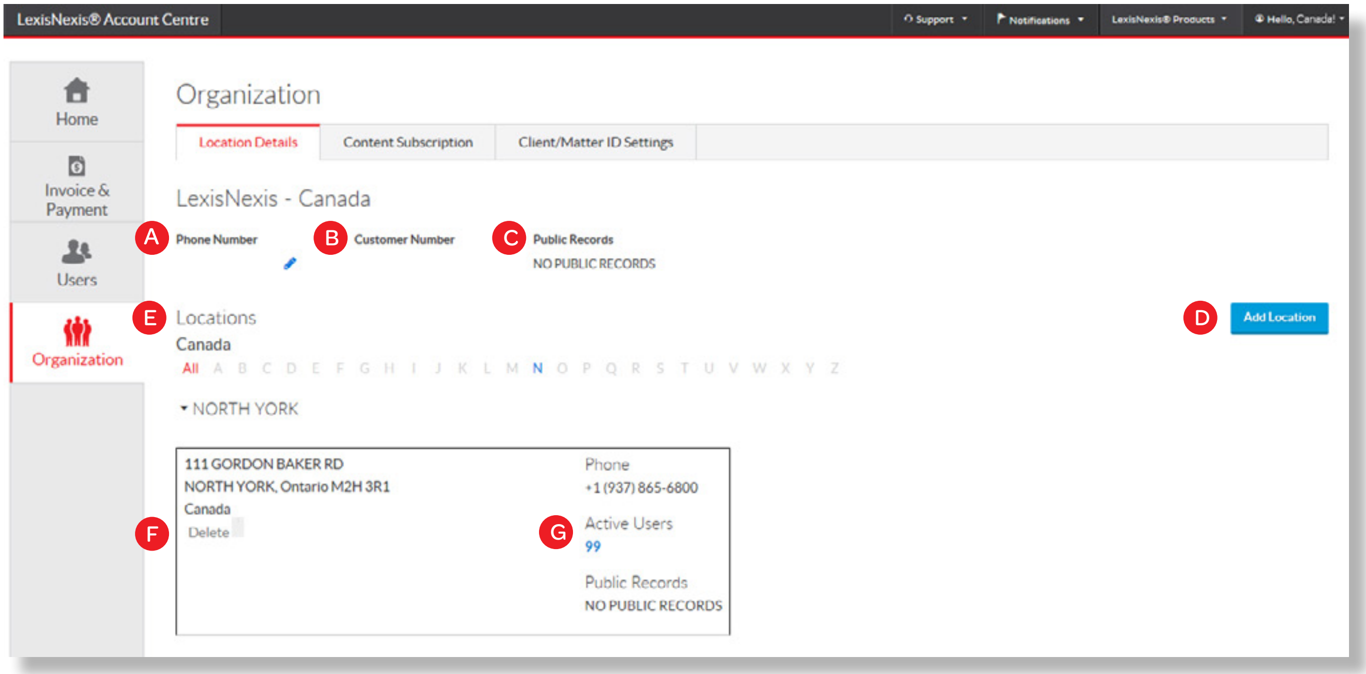
Organization: Location Details



You may review and manage the locations (places of business) for your organization.

- **A** **Phone number**. Displays the phone number for your organization. This may be edited by clicking on the pencil icon.
- **B** **Customer Number**.
- **C** **Public Records**. The public records access level for your organization.
- **D** **Add Location**. You can add a new location to an account.
- **E** **Locations**. The address(es) for the place(s) of business for your organization.
- **F** **Delete**. You can delete a location from your organization.
- **G** **Active Users**. Selecting this hyperlink takes you to the list of active users at this location.

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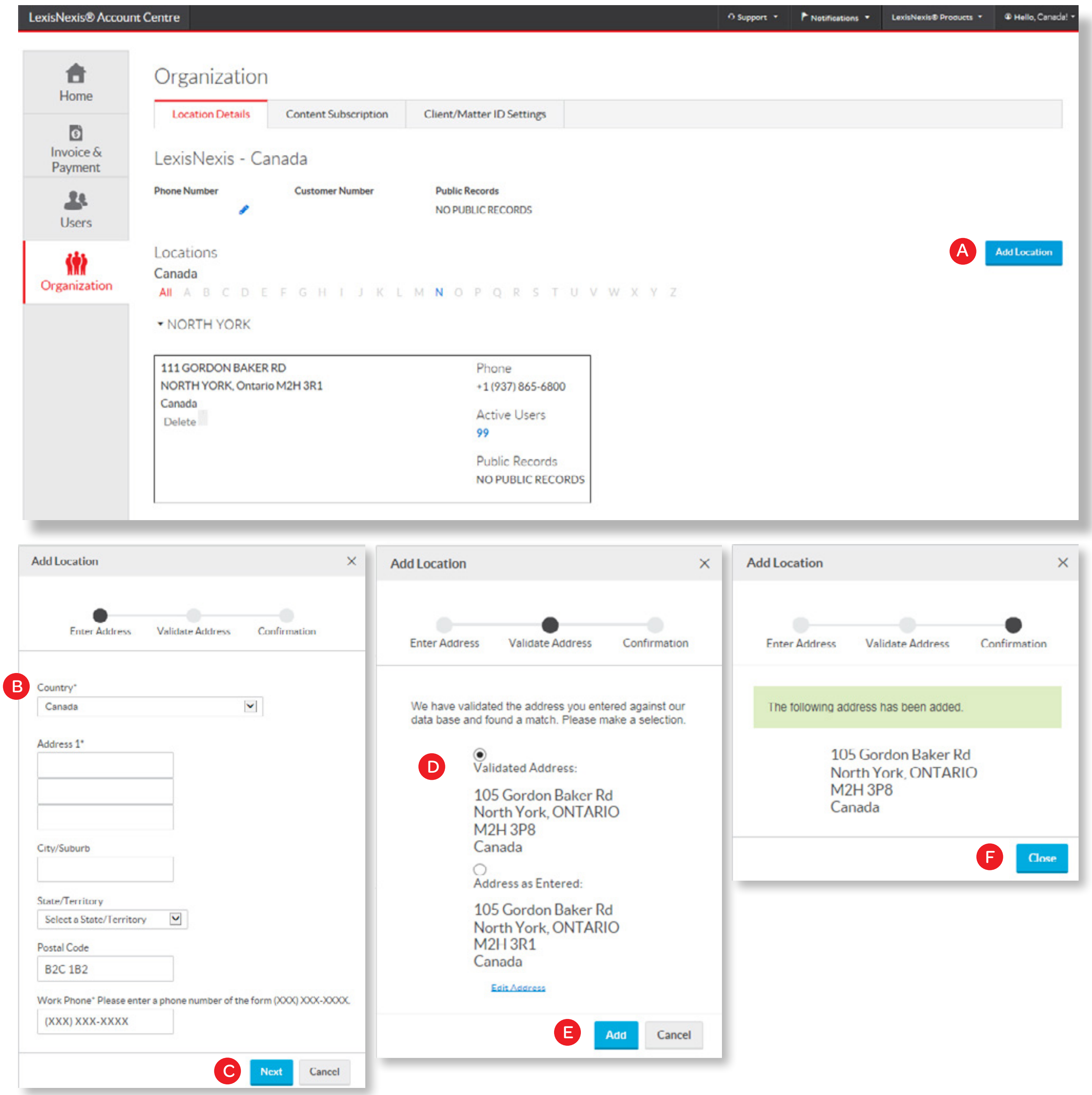
Organization: Add Location



You can add a new location to an account through LexisNexis Account Centre..

- A Select the **Add Location** button.
- B **Complete the required fields**, indicated by an asterisk.
- C Select **Next**.
- D **Validate** address.
- E Select **Add**.
- F **Confirm** address by selecting **Close.**

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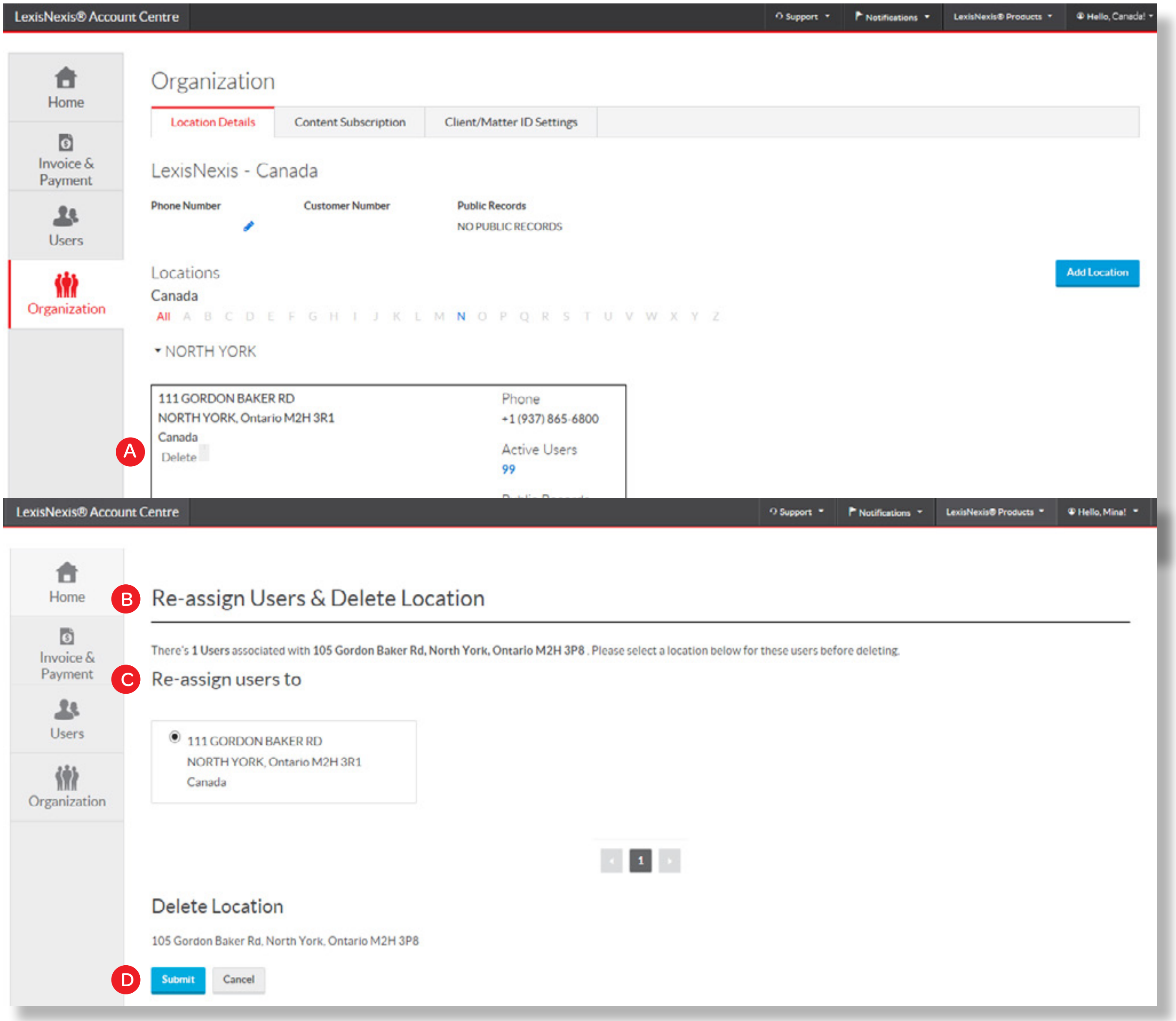
Organization: Delete Location



You can delete a location from your organization through LexisNexis Account Centre.

- **A** Identify the location you want to delete and click the **Delete** link.
- **B** The **re-assign users and delete location page** will pop up, indicating the number of users that must be assigned to a new location.
- **C** Select the new location you want to assign the users to.
- **D** Select **Delete** under delete location.

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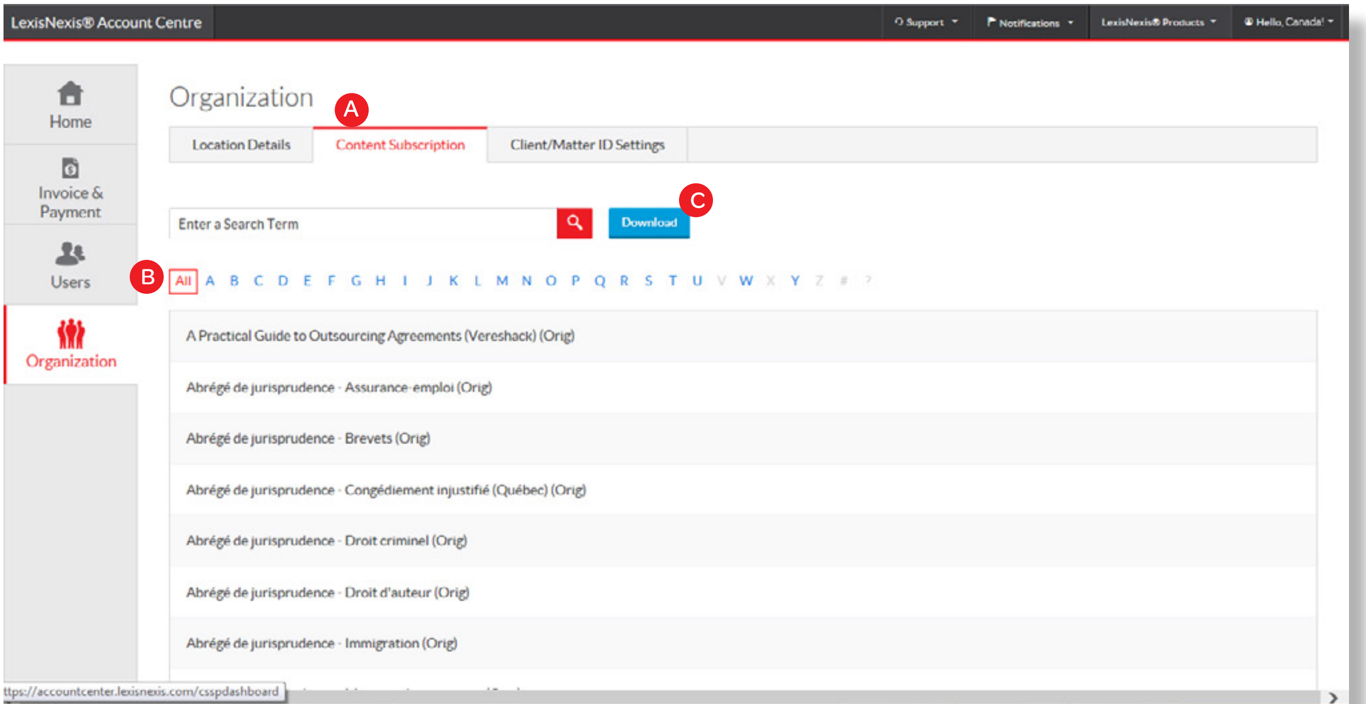
Organization: Content Subscription



You can view and download the list of publications your organization is subscribed to or search for a specific publication through LexisNexis Account Centre

A Select the **Content Subscription** tab.

B **To find a specific publication, do one of the following**:

-Enter the name (or part of a name) in the **search box** and select the Search button to find a publication.

-Use the **alphabetical list** to search for a publication alphabetically.

-Select a **page number at the bottom of the page** to display the next group of publications or use the **right and left arrows** to page through the list of publications.

C **Click Download** to download the list of all publications the organization is subscribed to so you can save or print it.

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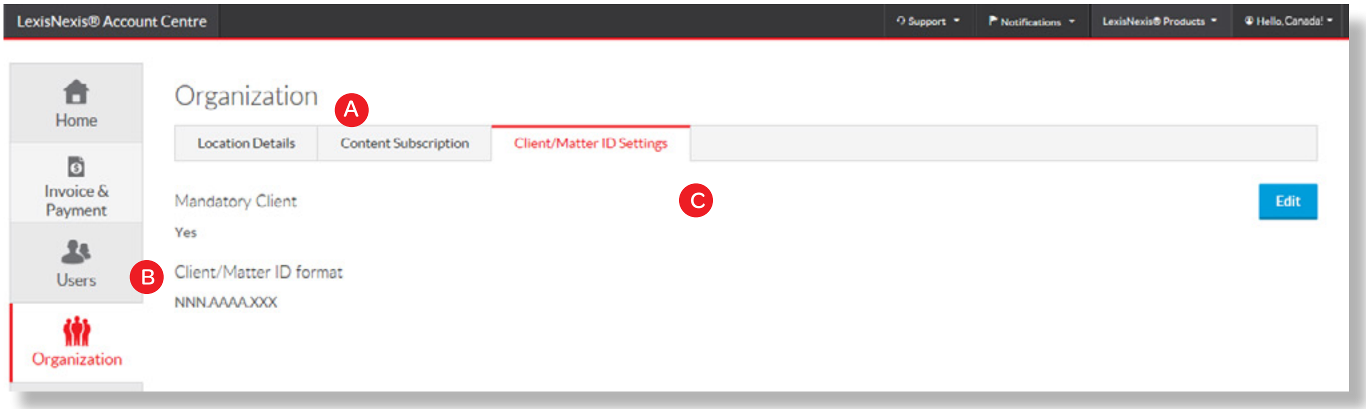
Organization: Client Matter



You can set or change the Client ID settings for your organization through LexisNexis Account Centre

A Select the **Client/ID Matter Settings** tab.

B Select the **Edit** button.

C **Edit settings** as needed (see the chart below for more information).

D Click **Save**.

Value	Description
Client ID mandatory	Select this to require users for this organization to set a Client ID when signing in to LexisNexis® Account Center.
Client/Matter ID format	Enter the format the client/matter ID must conform to. • N - means 0-9 is required • X - means 0-9 and A-Z are acceptable • A - means A-Z is required • B - means a blank is required The identifier you enter must match the displayed format character for character. For example, if the displayed format were XXXB##-##, you would have to enter a 9-character identifier consisting of 3 alphanumeric characters, followed by a blank, 2 numeric characters, a hyphen, and 2 more numeric characters.
Use third-party validation	Select this if you are using a software-based client validation application such as LexisNexis® Cost Recovery Manager, Lookup Precision, Research Monitor, or OneLog.
Client Validation URL	If you are using a URL-based client validation application, enter the URL here.
Test URL to enable client validation (optional)	If you are using a URL-based client validation application, enter the URL here.

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