

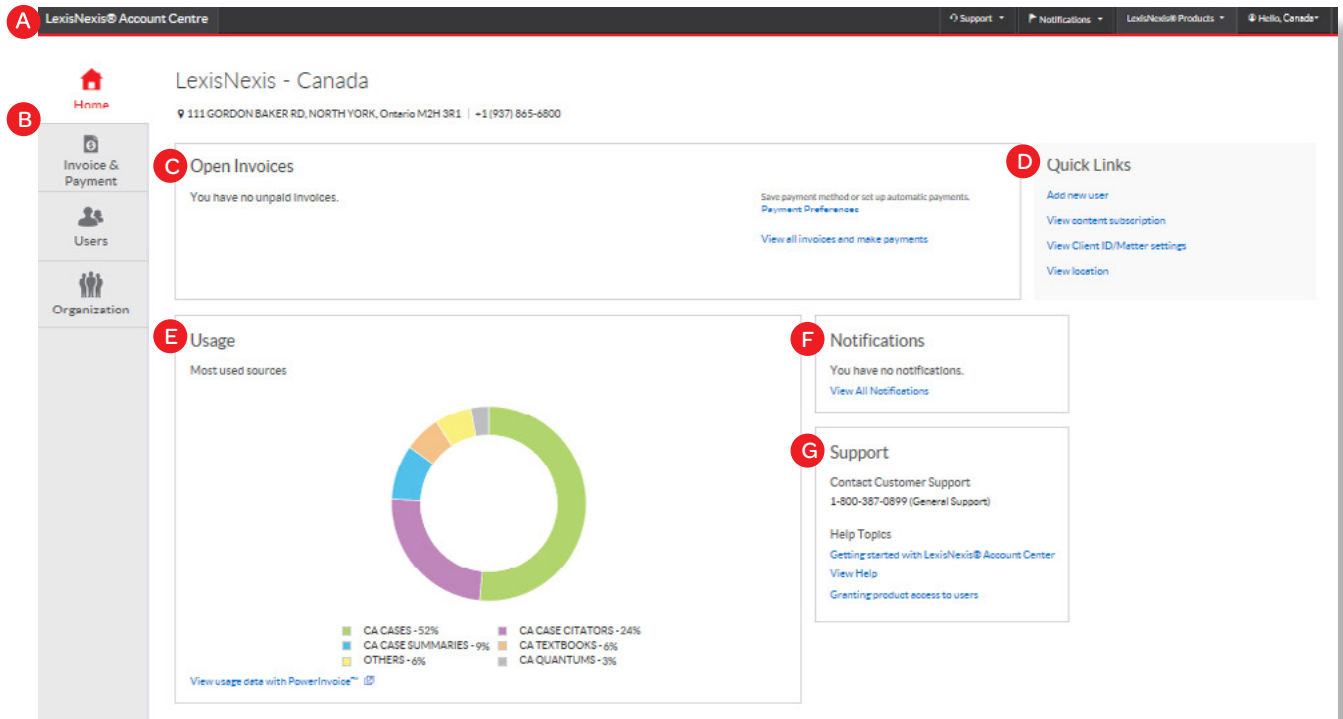
LEXISNEXIS® ACCOUNT CENTRE QUICK REFERENCE GUIDE

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

Getting Started: Home	2
Getting Started: Global Navigation Bar	3
Invoice & Payments	4
Invoice and Payments: Invoices	5
Invoice and Payments: Payment	
Preferences	5
Users	6
Users: Add User	7
Users: Narrow By	8
Users: Reset Password	9
Users: Edit User Details	9
Users: Product Access	10
Users: Usage	11
Organization: Location Details	12
Organization: Add Location	13
Organization: Delete Location	14
Organization: Content Subscription	15
Organization: Client Matter	16

Getting Started: Home

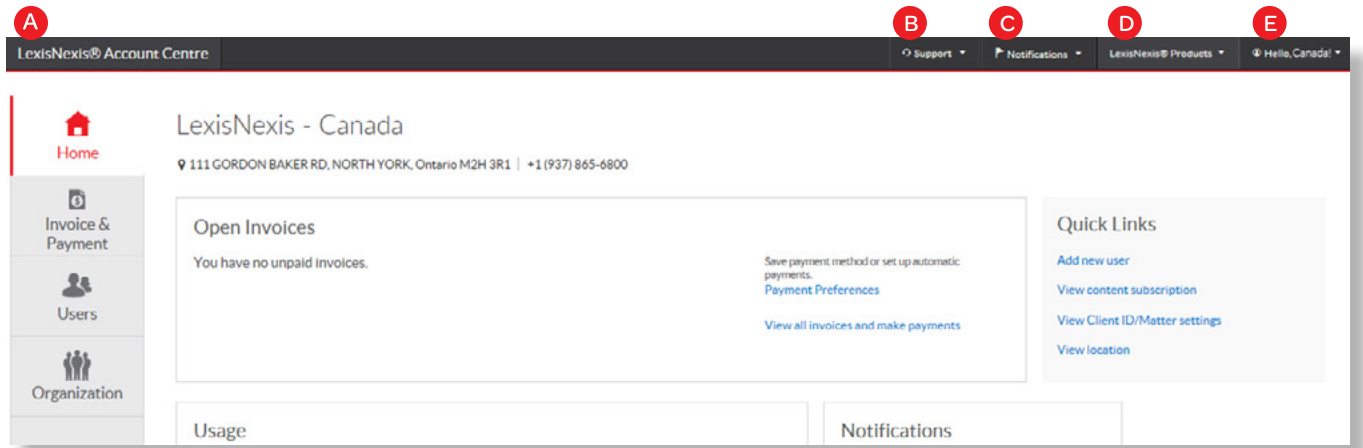


The LexisNexis Account Centre home page gives you access to all your account tasks, plus at-a-glance information about important areas of your account.

- 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**.

*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: Global Navigation Bar

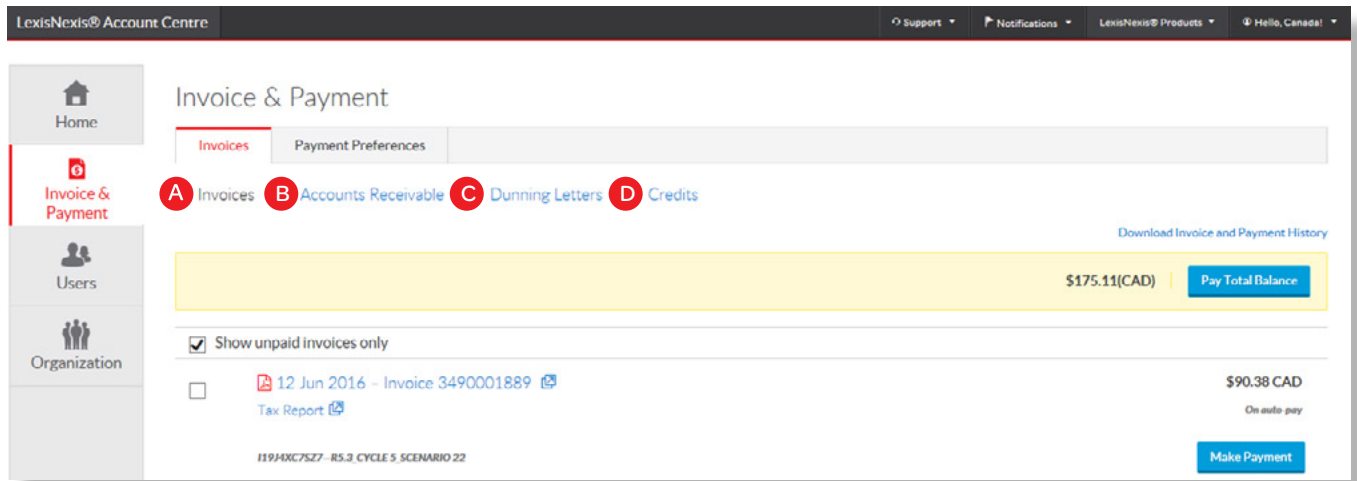


- A LexisNexis Account Centre.** Click to return to the LexisNexis Account Centre Home page.
- B Support.** Click the drop-down menu to view the Customer Support phone number, access Help screens, and provide feedback or suggestions.
- C Notifications.** The administrator will receive notification for 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.

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

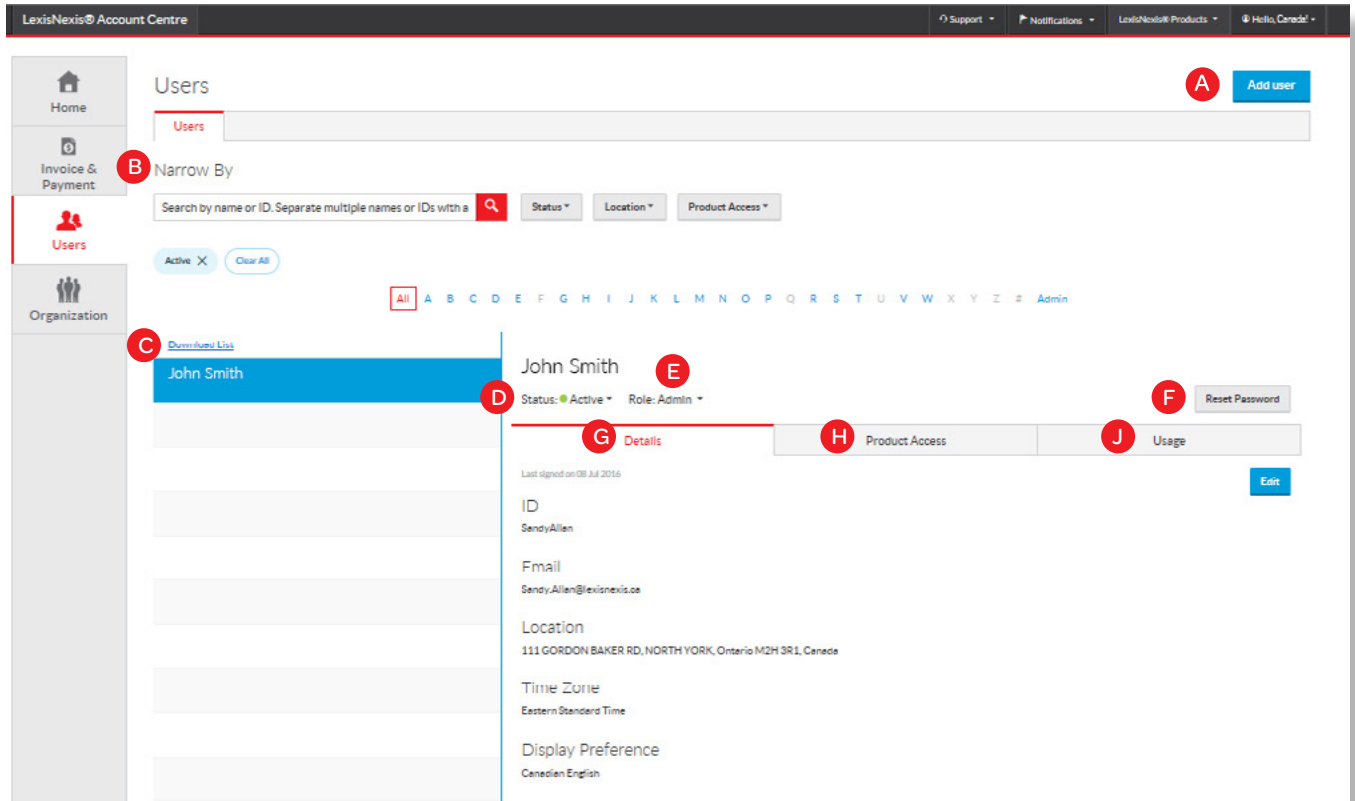
- A Show unpaid invoices only.** Select this checkbox to see only open invoices.
- B Pay Total Balance.** Select this button to pay the entire amount owed for this account.
- C Make Payment.** Select this button to pay specific invoices or multiple invoices.

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

LexisNexis® Account Centre

Support Notifications LexisNexis® Products Hello, Canada

Home Users

LexisNexis® Account Centre Support Notifications LexisNexis® Products Hello, Canada

B Add New User

Select the location you want to add the new user to.*

111 GORDON BAKER RD, NORTH YORK, Ontario M2H 3R1

Note: when creating multiple users at once, all users will be assigned the same location and product access.

First Name* Middle Name Last Name* Email Address*

john.smith@yahoo.com Clear Row

C Email ID and Password to user
 Send user ID and password to me

D Product Access
 Lexis Advance® Quicklaw

E Create Additional Users

F Submit Cancel

- 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.

LexisNexis® Account Centre Support Notifications LexisNexis® Products Hello, Minal

G

You have successfully created 1 users

Name:	Lexis, John ✓
Email:	john.lexis@lexisnexis.ca
User ID:	john.lexis
Temporary Password:	wzafW9nv

H Add as admin

[Back to User List](#) | [Back to Add User](#) | [Download User Information](#) | [Email User Information](#)

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Users: Narrow By

The screenshot shows the LexisNexis Account Centre interface. At the top, there's a navigation bar with 'Support', 'Notifications', 'LexisNexis Products', and 'Hello, Canada!'. The main content area is titled 'Users' and includes an 'Add user' button. Below the title is a search bar with the text 'Search by name or ID. Separate multiple names or IDs with a ;'. To the right of the search bar are three filters: 'Status', 'Location', and 'Product Access'. Below the search bar are two buttons: 'Active X' and 'Clear All'. A horizontal list of letters from 'A' to 'Z' is displayed, with 'All' selected. Below the list is a table of users, with 'John Smith' highlighted. To the right of the table is a detailed view for John Smith, showing his status as 'Active', role as 'Admin', and a 'Reset Password' button. Below the details are three tabs: 'Details', 'Product Access', and 'Usage'. The 'Details' tab is active, showing fields for ID, Email, Location, Time Zone, and Display Preference.

- 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.

Users: Reset Password

The screenshot shows the LexisNexis Users management interface. A modal dialog titled "Password Reset" is open, displaying the following information:

- Name: Lexis, John
- User ID: john.lexis
- Email: john.lexis@lexisnexis.ca

At the bottom of the dialog, there are two checkboxes:

- Email this information to the user
- Email this information to me

Buttons labeled "Reset Password" and "Close" are at the bottom right of the dialog. In the background, the "Reset Password" button on the user profile card is highlighted with a red circle 'A'.

- 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 suppress the email to the user.
- C** Click **Reset Password**. The user's ID and temporary password will then display.

Users: Edit User Details

The screenshot shows the LexisNexis Users management interface. A modal dialog titled "Edit User: John Lexis" is open, displaying the following information:

- First Name*: John
- Middle Name: [Empty]
- Last Name*: Lexis
- Role: End User
- ID: john.lexis
- Email*: john.lexis@lexisnexis.ca
- Location*: 111 GORDON BAKER RD, NORTH YORK, Ontario M2H 3R1
- Time Zone*: Eastern Standard Time
- Display Preference*: Canadian English
- Language Preference*: Canadian English

Buttons labeled "Save" and "Cancel" are at the bottom right of the dialog. In the background, the "Details" tab on the user profile card is highlighted with a red circle 'A', and the "Edit" button is highlighted with a red circle 'B'.

- 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

The screenshot displays the LexisNexis Account Centre interface. The main navigation menu on the left includes Home, Invoice & Payment, Users, and Organization. The 'Users' page features a search bar and filters for Status, Location, and Product Access. A modal window titled 'Edit User: John Lexis' is open, showing the 'Product Access' tab with a list of products and checkboxes. The 'Product Access' tab is highlighted with a red circle 'A'. The 'Edit' button is highlighted with a red circle 'B'. The 'Save' button is highlighted with a red circle 'C'.

- A Product Access.** Select this tab to see the products that the user whose name is displayed has access to.
- B Edit button.** Select this to edit product access for the user whose name is displayed.
- C** Make desired changes using the checkboxes and then click **Save**.

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Users: Usage

LexisNexis Canada

Status: ● Active ▾ Role: Admin ▾

Reset Password

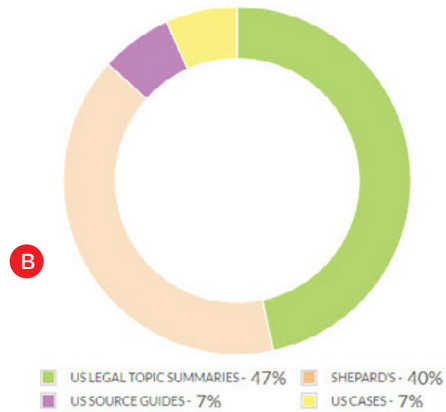
Details



Product Access

Public Records

Usage

Top 8 sources Used



A [View usage data with PowerInvoice™](#) 
[Create Analytical Charts](#) 

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.

Organization: Location Details

The screenshot shows the LexisNexis Account Centre interface. The top navigation bar includes 'LexisNexis Account Centre', 'Support', 'Notifications', 'LexisNexis Products', and 'Hello, Canada!'. The left sidebar contains navigation options: Home, Invoice & Payment, Users, and Organization (highlighted in red). The main content area is titled 'Organization' and has tabs for 'Location Details' (selected), 'Content Subscription', and 'Client/Matter ID Settings'. Below the tabs, the organization name 'LexisNexis - Canada' is displayed. Three key pieces of information are shown: 'Phone Number' (marked with a red circle A), 'Customer Number' (marked with a red circle B), and 'Public Records' (marked with a red circle C) which is set to 'NO PUBLIC RECORDS'. Below this, the 'Locations' section (marked with a red circle E) shows 'Canada' with an alphabetical index. Under 'Canada', 'NORTH YORK' is expanded to show a location card (marked with a red circle F). The card displays the address '111 GORDON BAKER RD, NORTH YORK, Ontario M2H 3R1, Canada' and a 'Delete' button. To the right of the address, the 'Phone' number is '+1 (937) 865-6800' and 'Active Users' is '99' (marked with a red circle G). Below the active users, the 'Public Records' status is 'NO PUBLIC RECORDS'. A blue 'Add Location' button (marked with a red circle D) is located in the top right corner of the locations section.

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.

Organization: Add Location

The screenshot shows the LexisNexis Account Centre interface. The top navigation bar includes 'Support', 'Notifications', 'LexisNexis Products', and 'Hello, Canada!'. The left sidebar has icons for Home, Invoice & Payment, Users, and Organization. The main content area is titled 'Organization' and has tabs for 'Location Details', 'Content Subscription', and 'Client/Matter ID Settings'. Under 'Location Details', there are fields for 'Phone Number', 'Customer Number', and 'Public Records' (NO PUBLIC RECORDS). Below this is a 'Locations' section with a dropdown for 'Canada' and an alphabetical index. A red circle 'A' highlights the 'Add Location' button in the top right corner.

The first screenshot shows the 'Add Location' dialog box with a progress bar and three steps: 'Enter Address', 'Validate Address', and 'Confirmation'. A red circle 'B' highlights the 'Country' dropdown menu, which is set to 'Canada'. Below it are fields for 'Address 1*', 'City/Suburb', 'State/Territory' (with a dropdown), 'Postal Code' (with 'B2C 1B2' entered), and 'Work Phone' (with a placeholder '(XXX) XXX-XXXX'). A red circle 'C' highlights the 'Next' button at the bottom right.

The second screenshot shows the 'Validate Address' step. A message states: 'We have validated the address you entered against our data base and found a match. Please make a selection.' A red circle 'D' highlights a radio button next to the 'Validated Address' section, which lists: '105 Gordon Baker Rd', 'North York, ONTARIO', 'M2H 3P8', 'Canada'. Below it is the 'Address as Entered' section with the same address. A red circle 'E' highlights the 'Add' button at the bottom right.

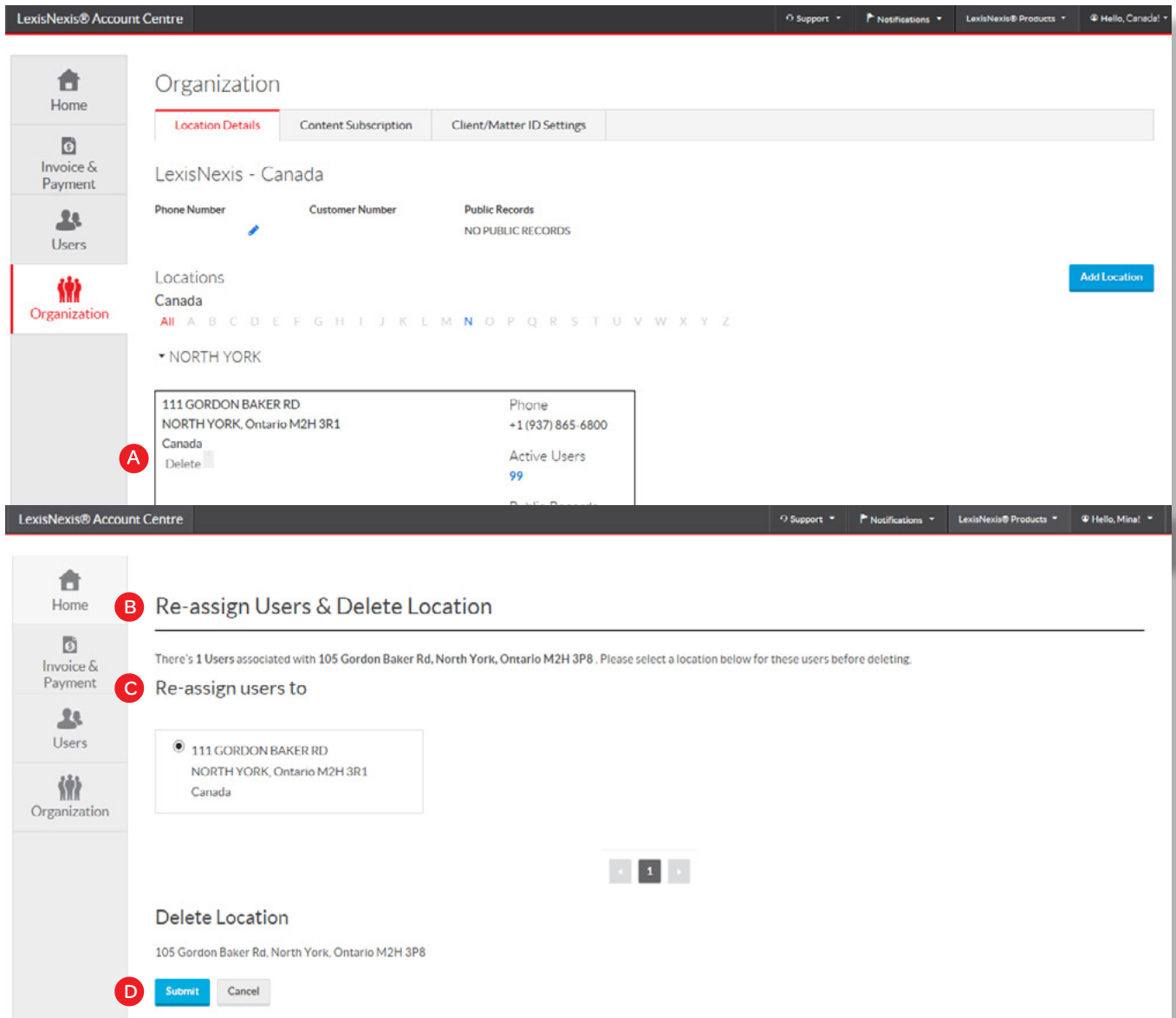
The third screenshot shows the 'Confirmation' step. A green message box states: 'The following address has been added.' Below it, the address is displayed: '105 Gordon Baker Rd', 'North York, ONTARIO', 'M2H 3P8', 'Canada'. A red circle 'F' highlights the 'Close' button at the bottom right.

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

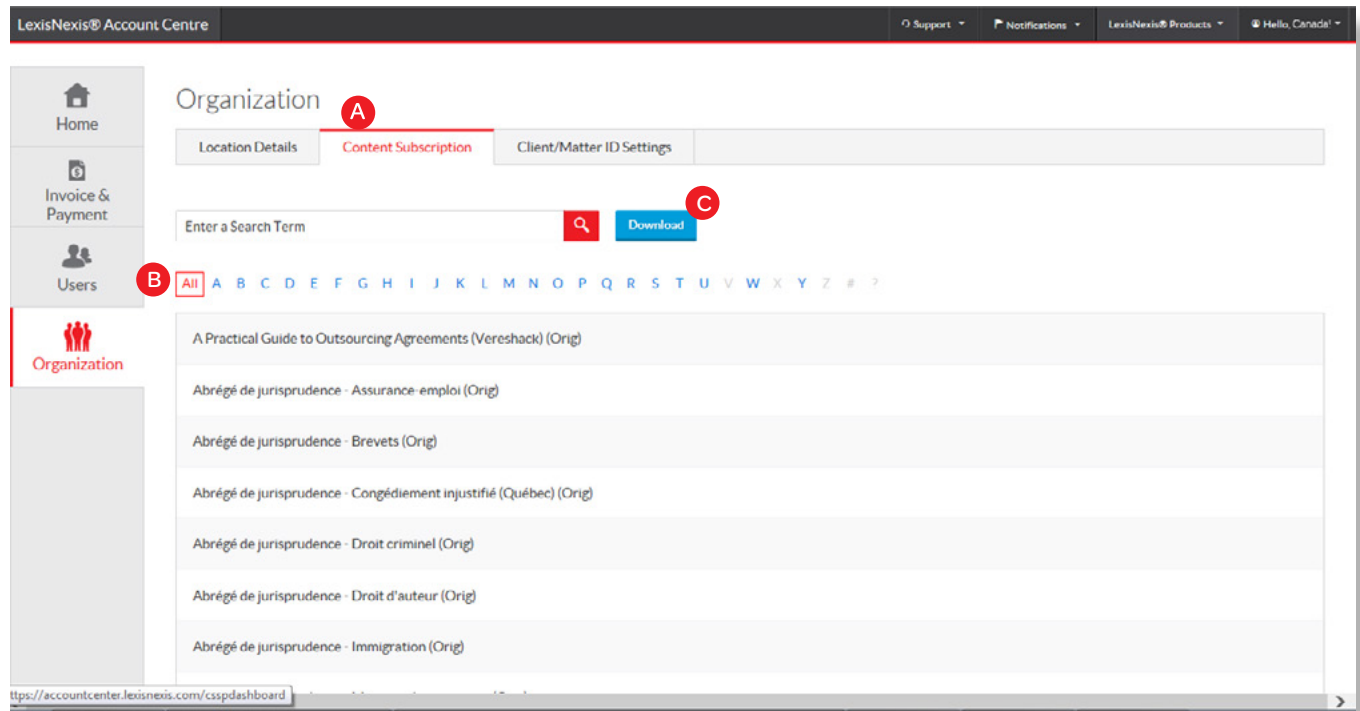


You can delete a location from your organization through LexisNexis Account Centre.

- 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.

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. <ul style="list-style-type: none"> • 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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