LexisNexis® Account Center

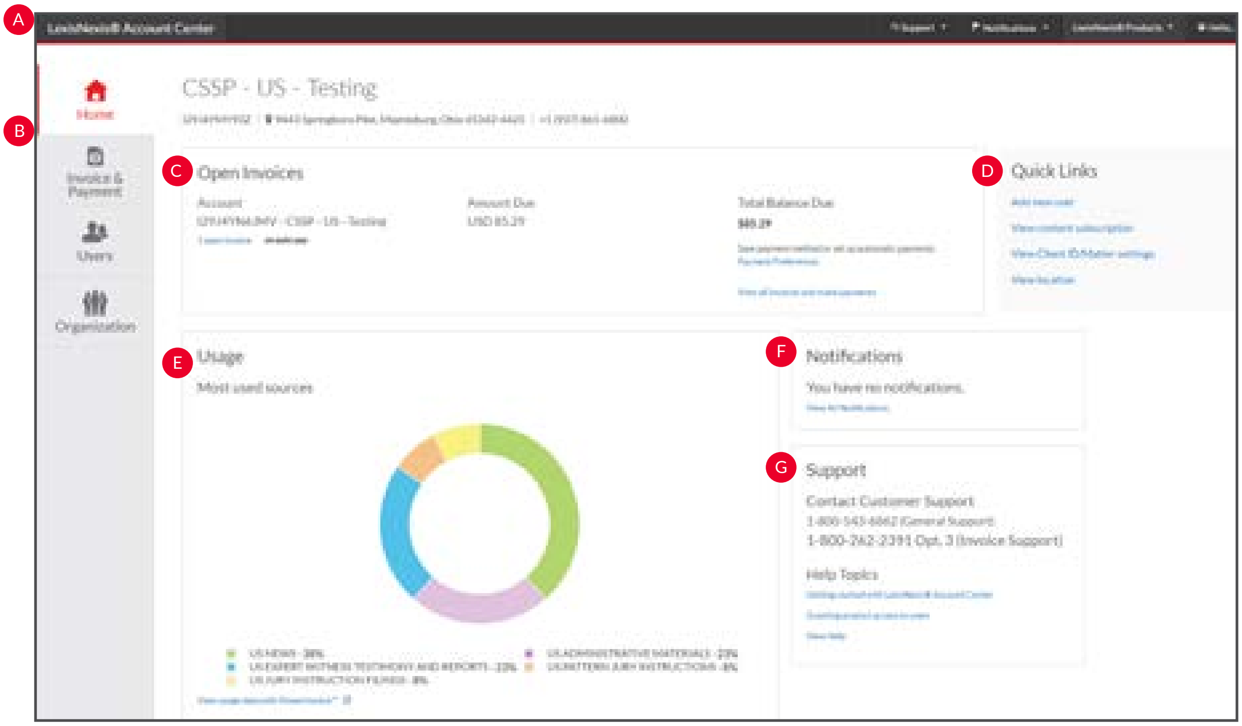
LEXISNEXIS® ACCOUNT CENTER QUICK REFERENCE GUIDE

This guide shows you where to find—and how to use—LexisNexis® Account Center 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 Center 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 & 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 contains *most used sources* for the organization.
- F The administrator will receive **notifications** 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* and *online tutorials*.

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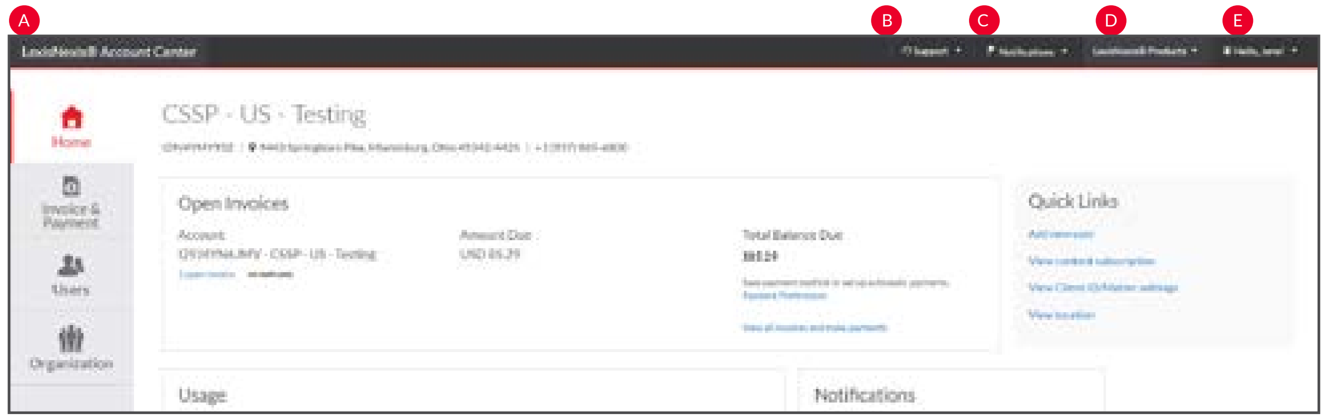
Getting Started: Global Navigation Bar



- **A** **LexisNexis Account Center**. Click to return to the LexisNexis Account Center 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 Products**. Click the drop-down menu to access additional LexisNexis products.
- **E** **Hello, admin!** Click the drop-down to edit profile information and sign out.

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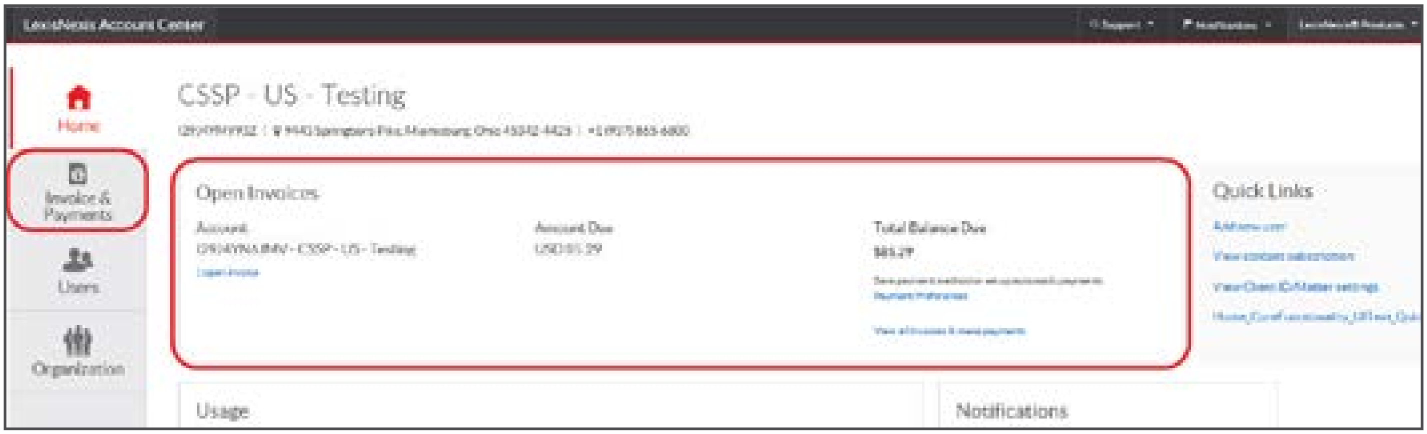
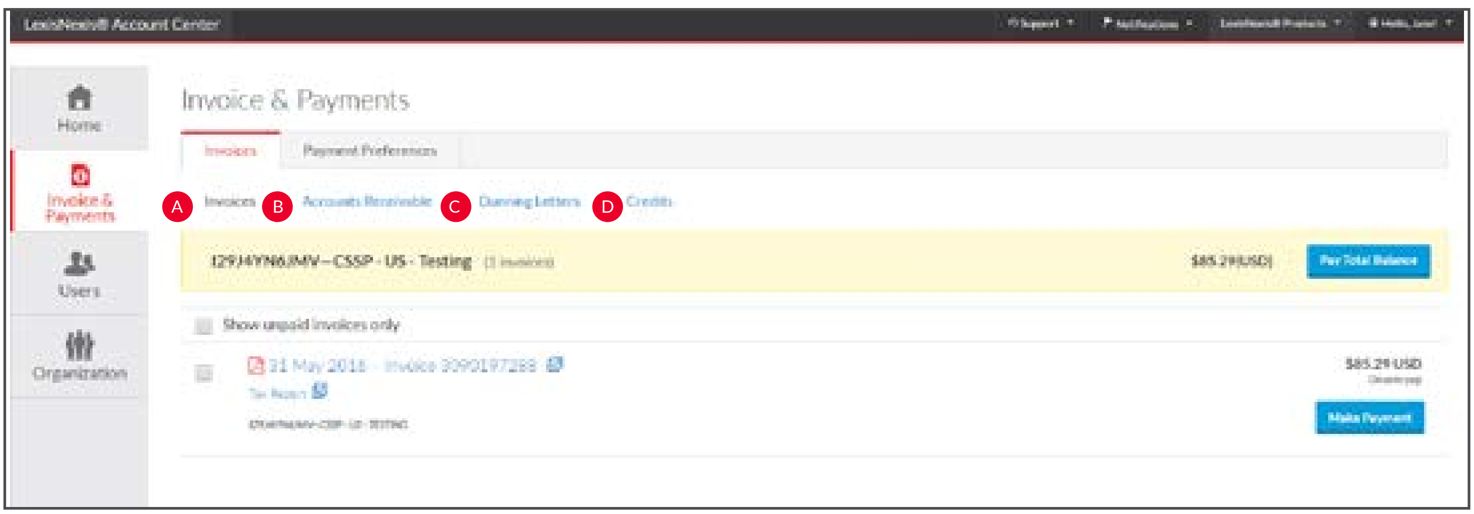
Invoice & Payments

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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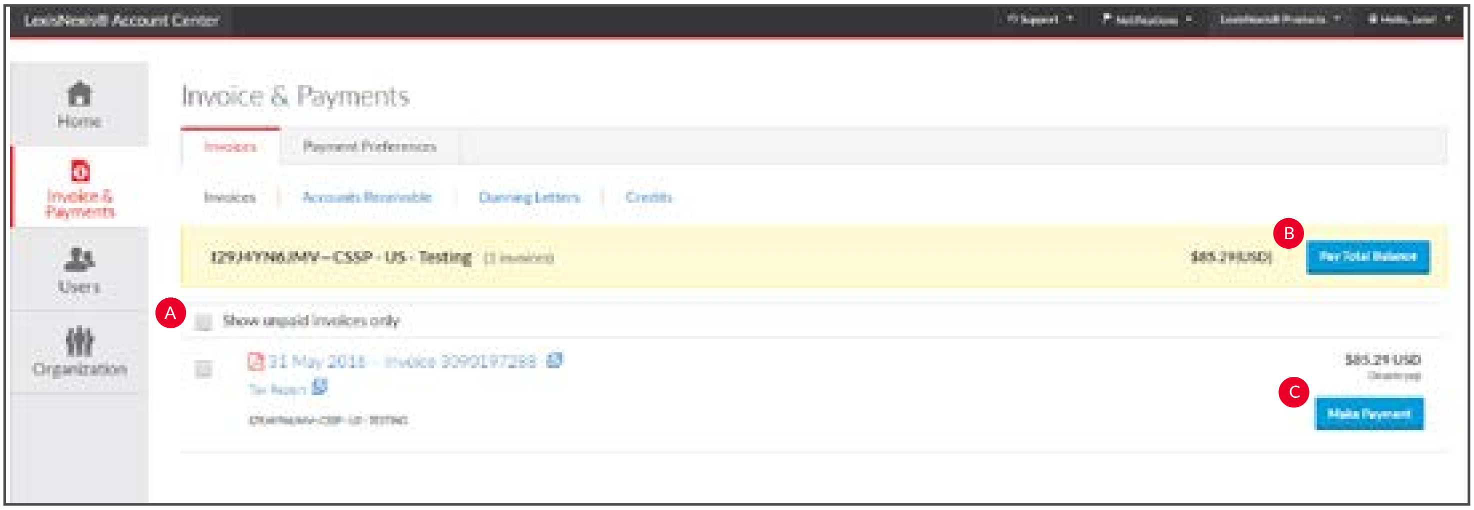
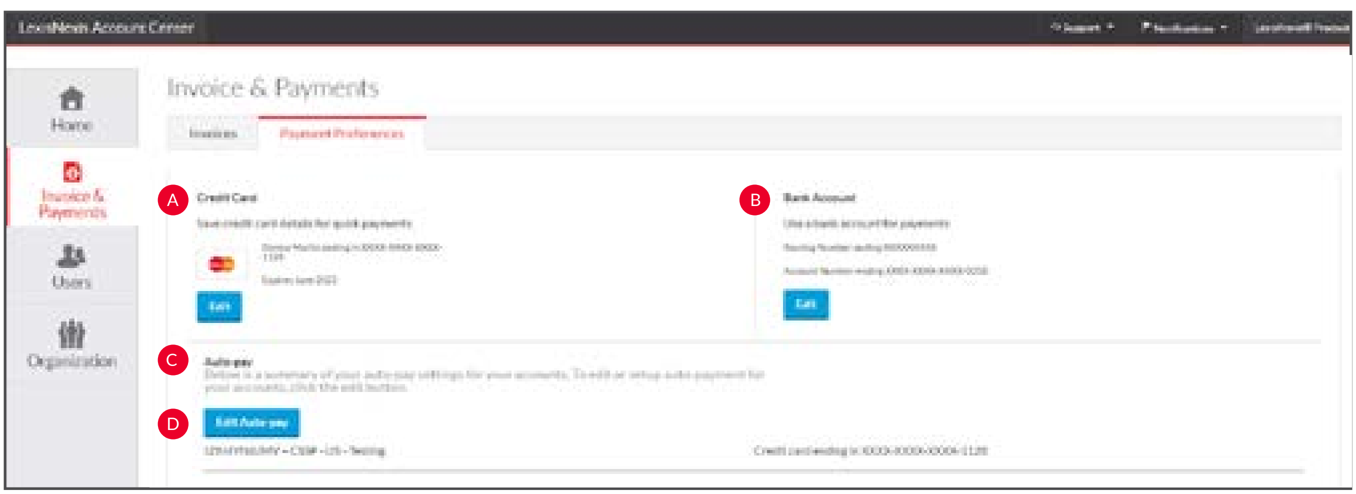
Invoice and Payments: Invoices



- **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.

Invoice and Payments: Payment Preferences



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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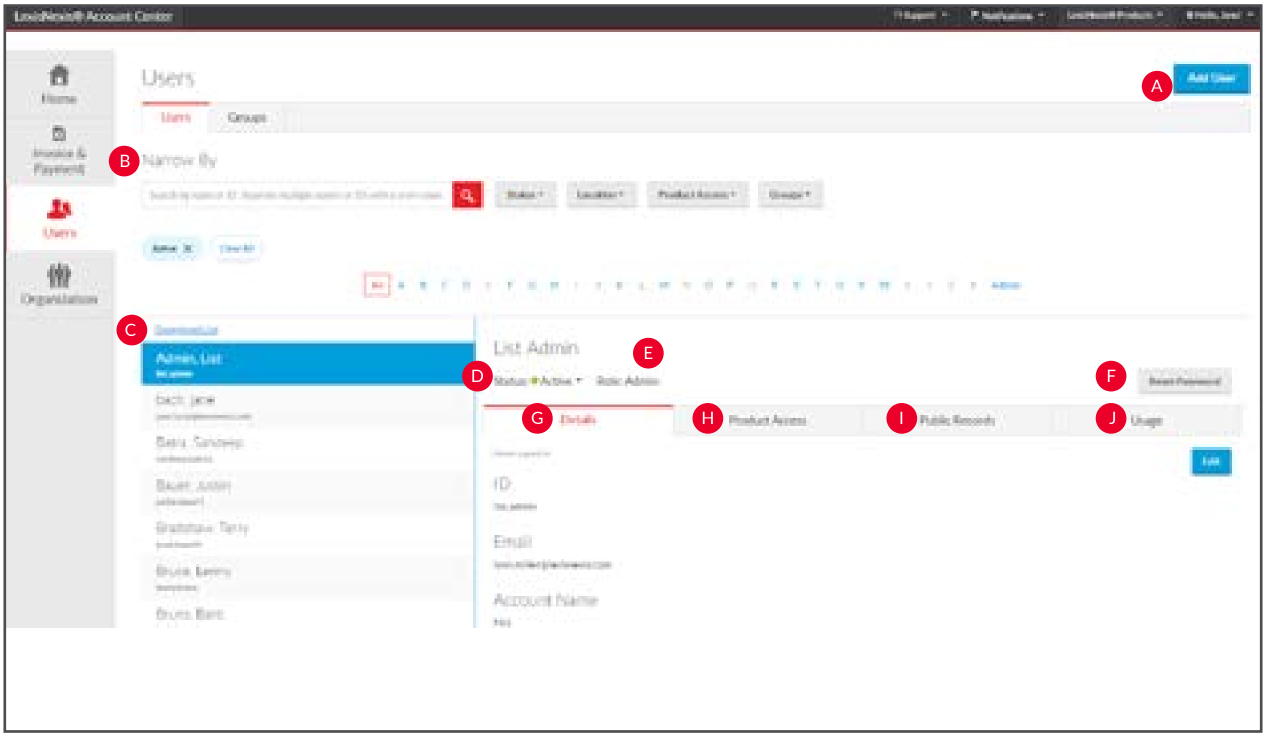
Users



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 new 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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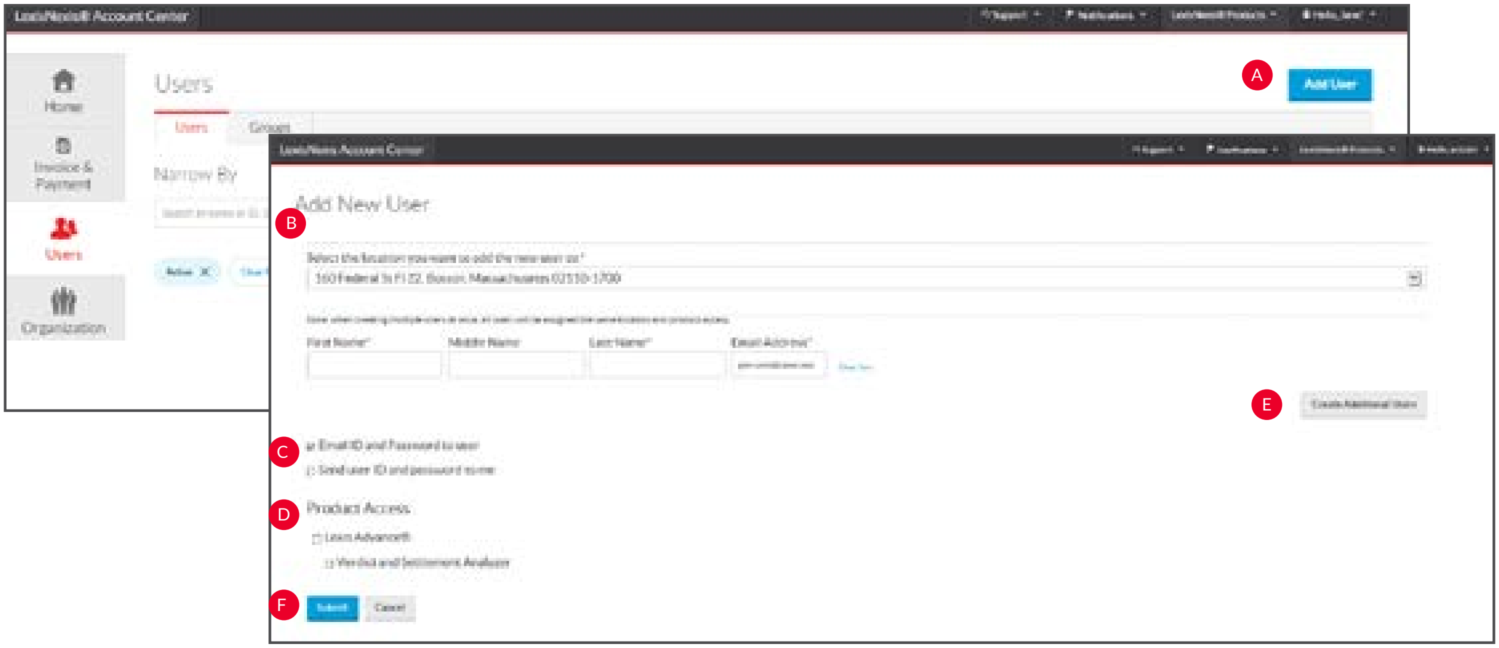
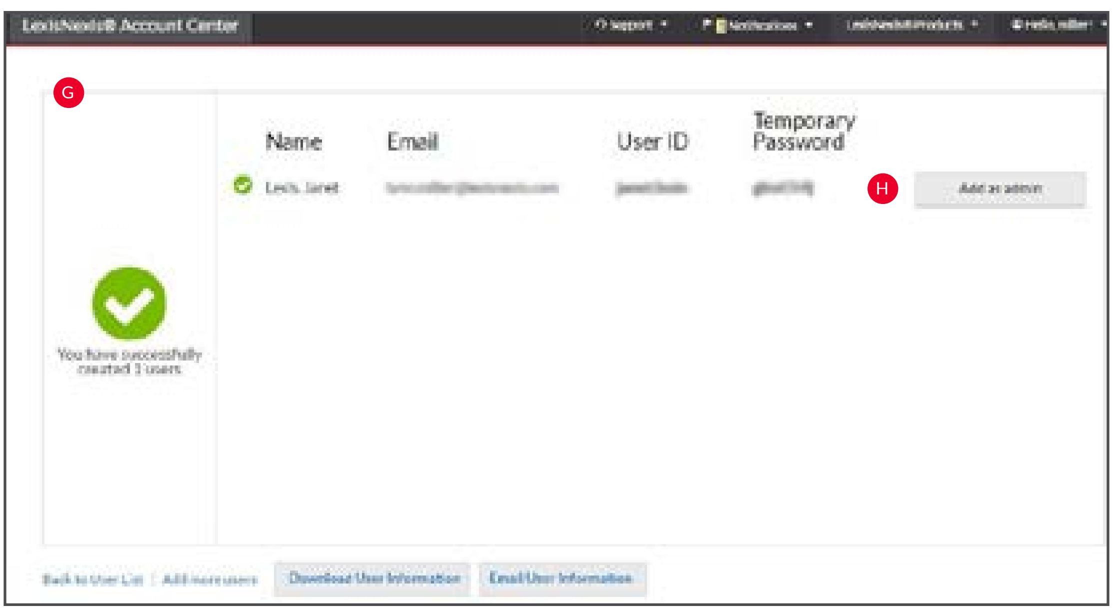
Users: Add User



- **A** **Add User.** Click the Add User button.
- **B** **Details.** Insert required information (identified by an asterisk).
- **C** **Delivery Option.** 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** **Product Access.** Insert check mark next to desired Product Access.
- **E** **Create Additional Users.** To create additional users, Click the Create Additional Users button.
- **F** **Submit.** 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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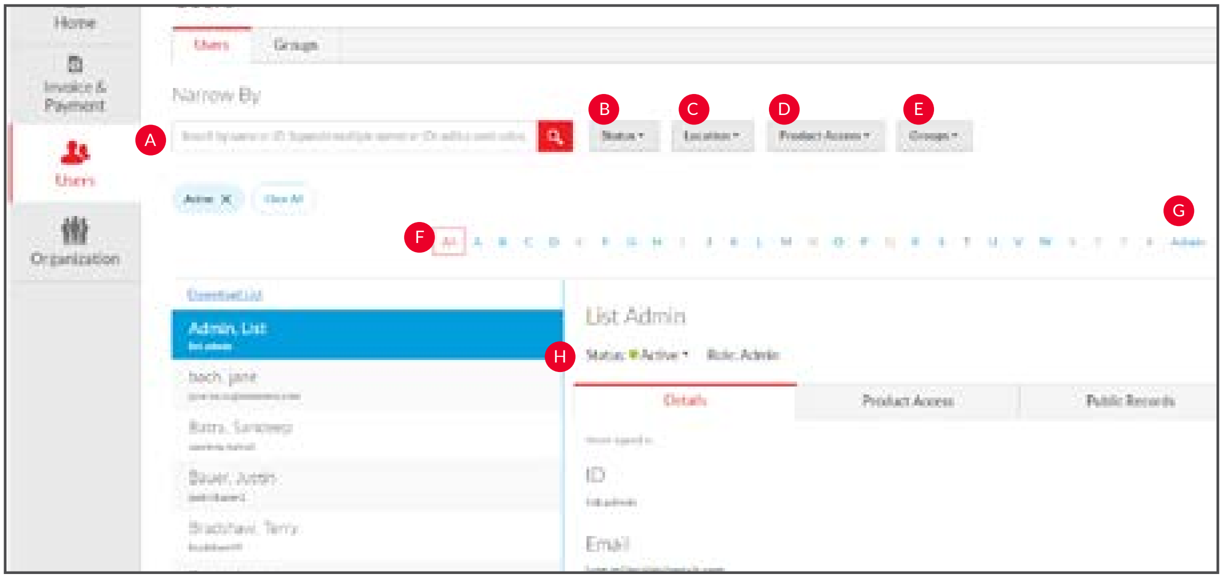
Users: Narrow By



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 **Groups.** Select the pull-down menu to narrow your search to users in a specific group.

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

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

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

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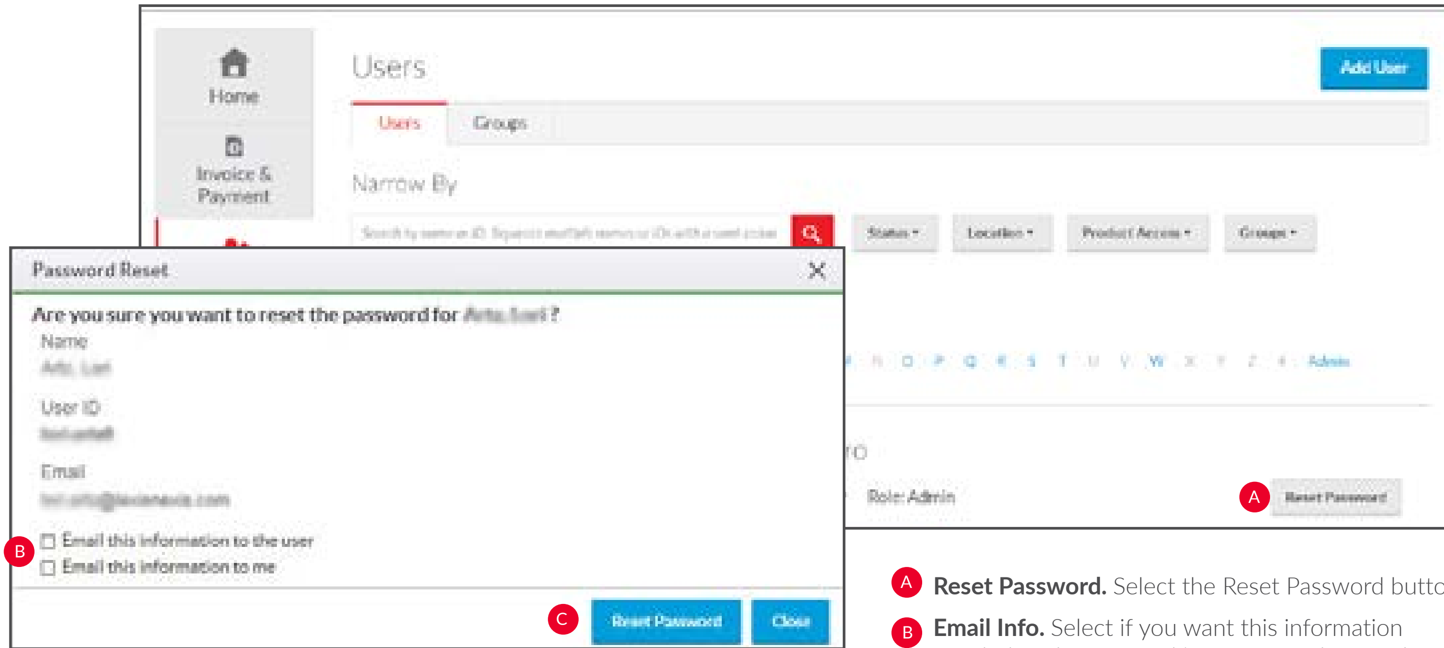
Users: Reset Password

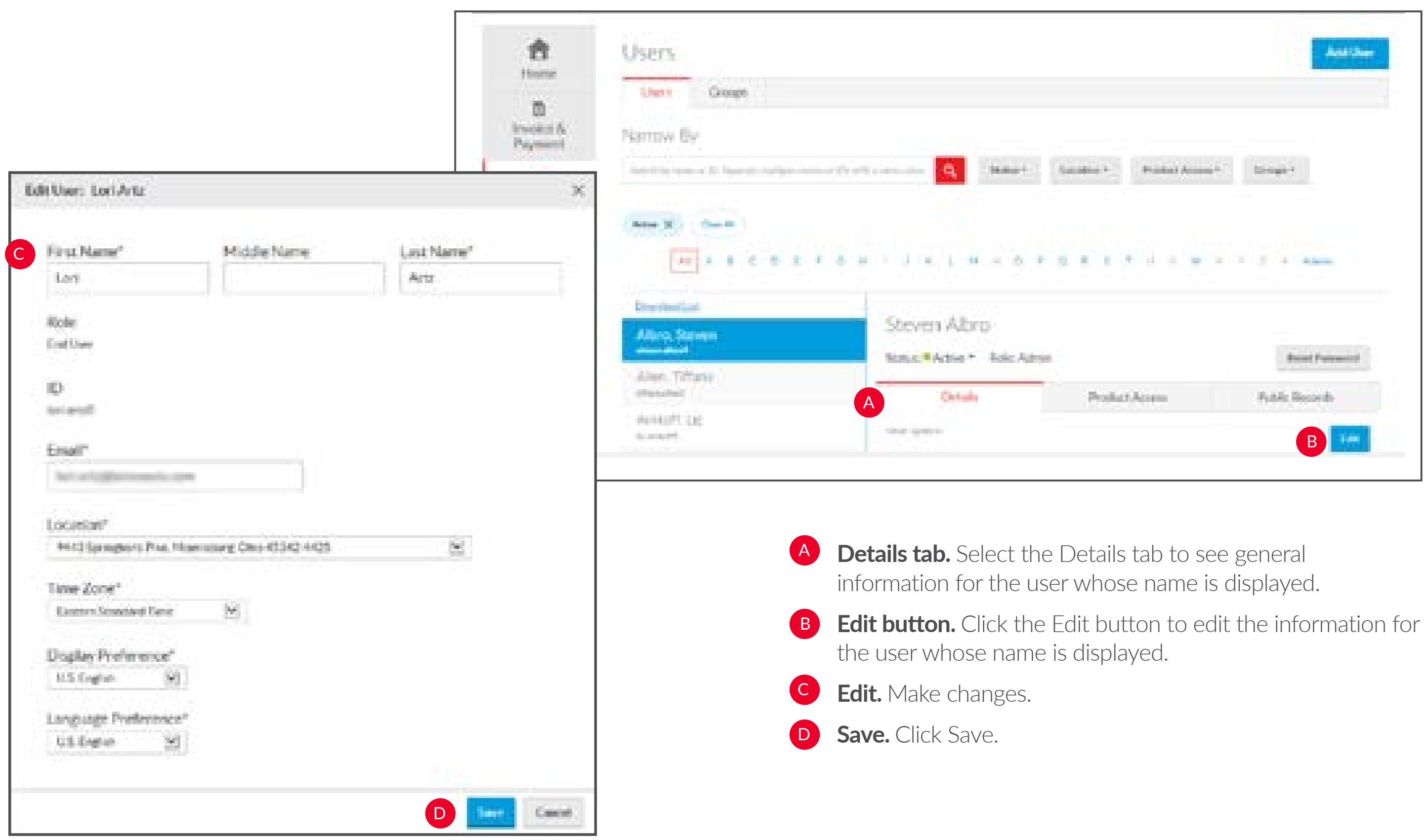


A **Reset Password.** Select the Reset Password button.

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

Users: Edit User Details



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

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

C **Edit.** Make changes.

D **Save.** Click Save.

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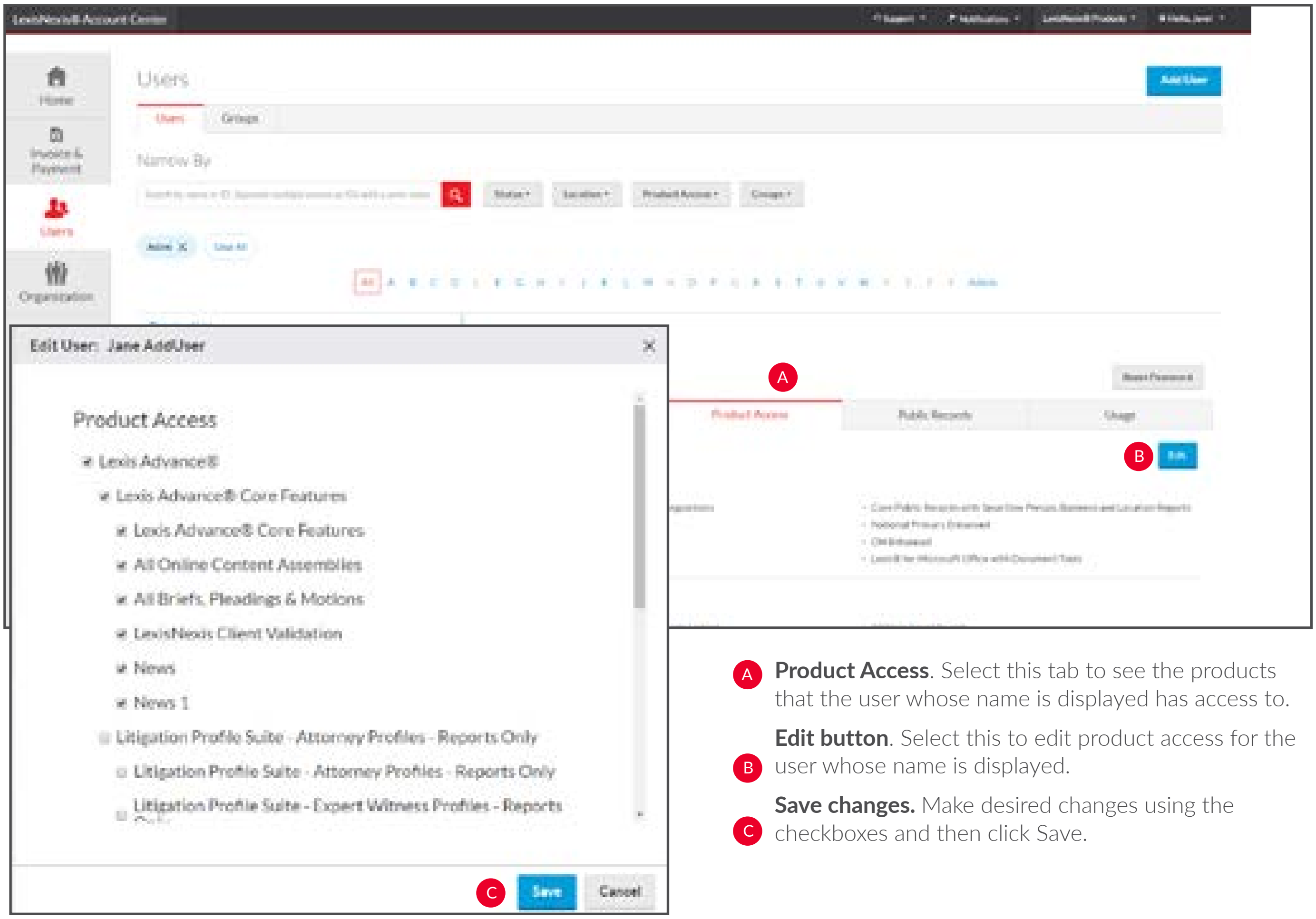
Users: Edit Product Access



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

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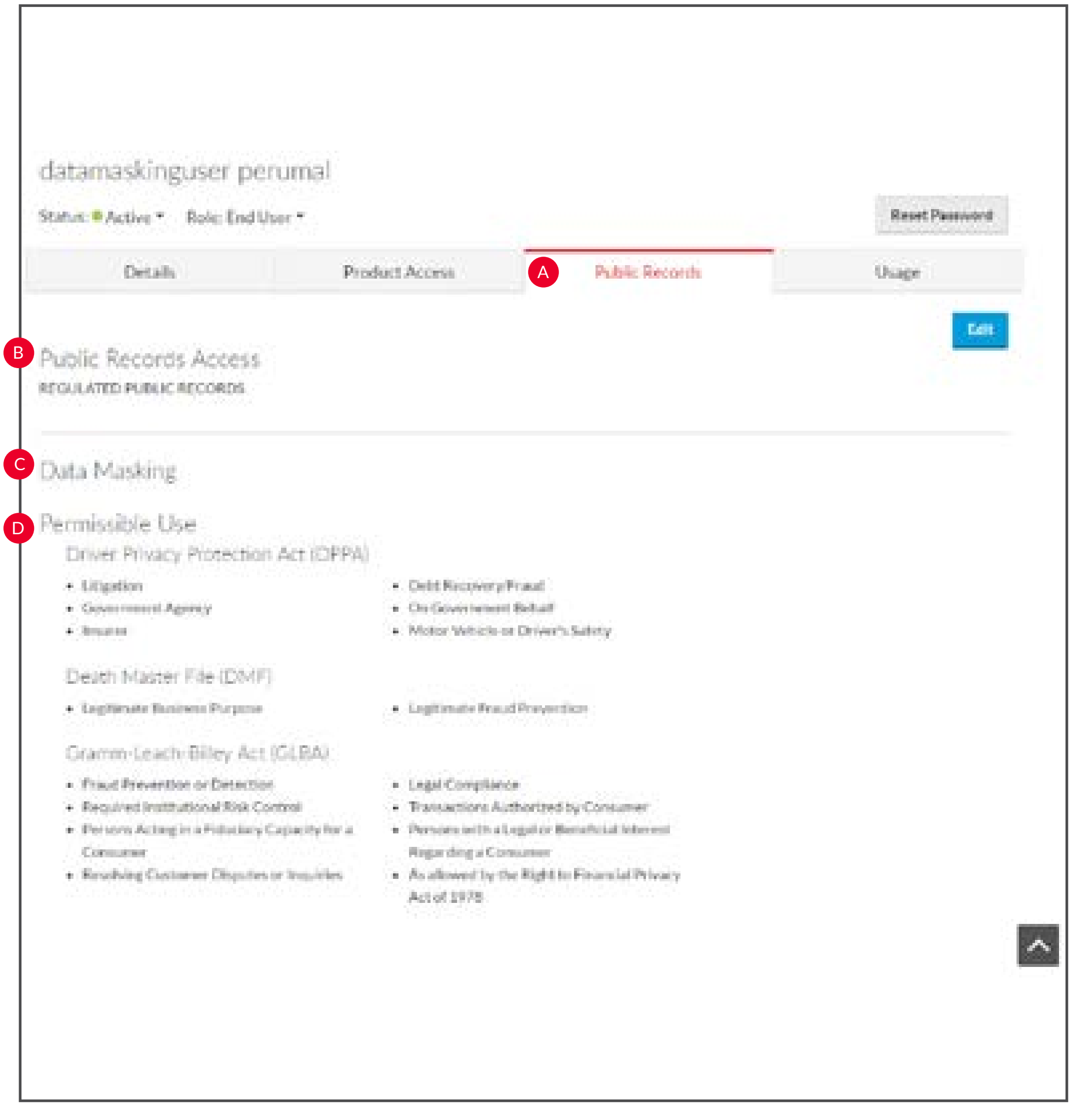
Users: Public Records



Select this tab to see the public records access information for the user whose name is displayed.

- (A) **Public Records.** Click this tab to see the public records the user whose name is displayed has access to.
- (B) **Public Records Access.** Indicates the Public Records type the user has access to (regulated, unregulated or no public records access).
- (C) **Data Masking**. Indicates the data that will be masked for the particular user within their public records research.
- (D) **Permissible Use**. Indicates the permissible use the user has.

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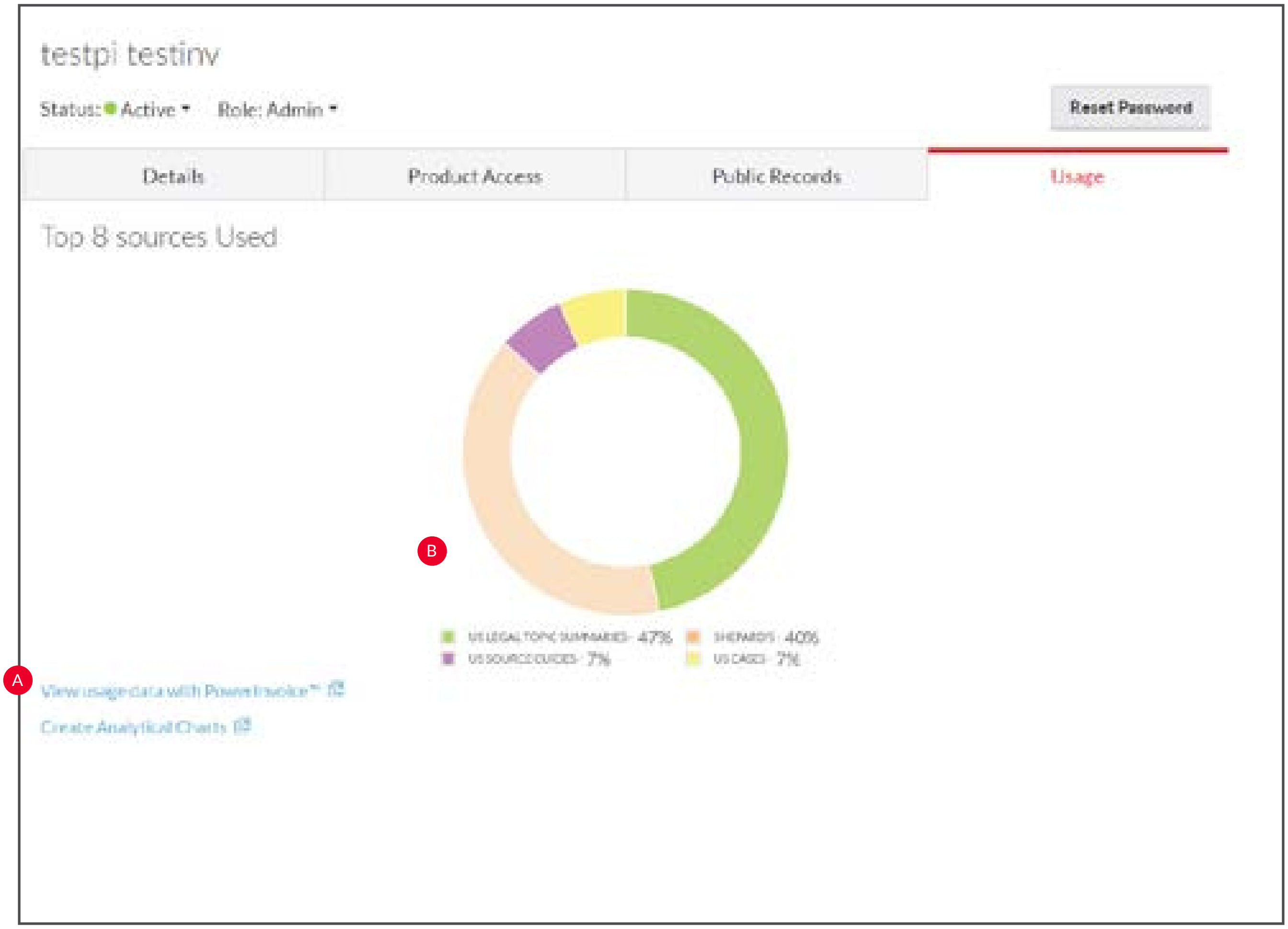
Users: Usage



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

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

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

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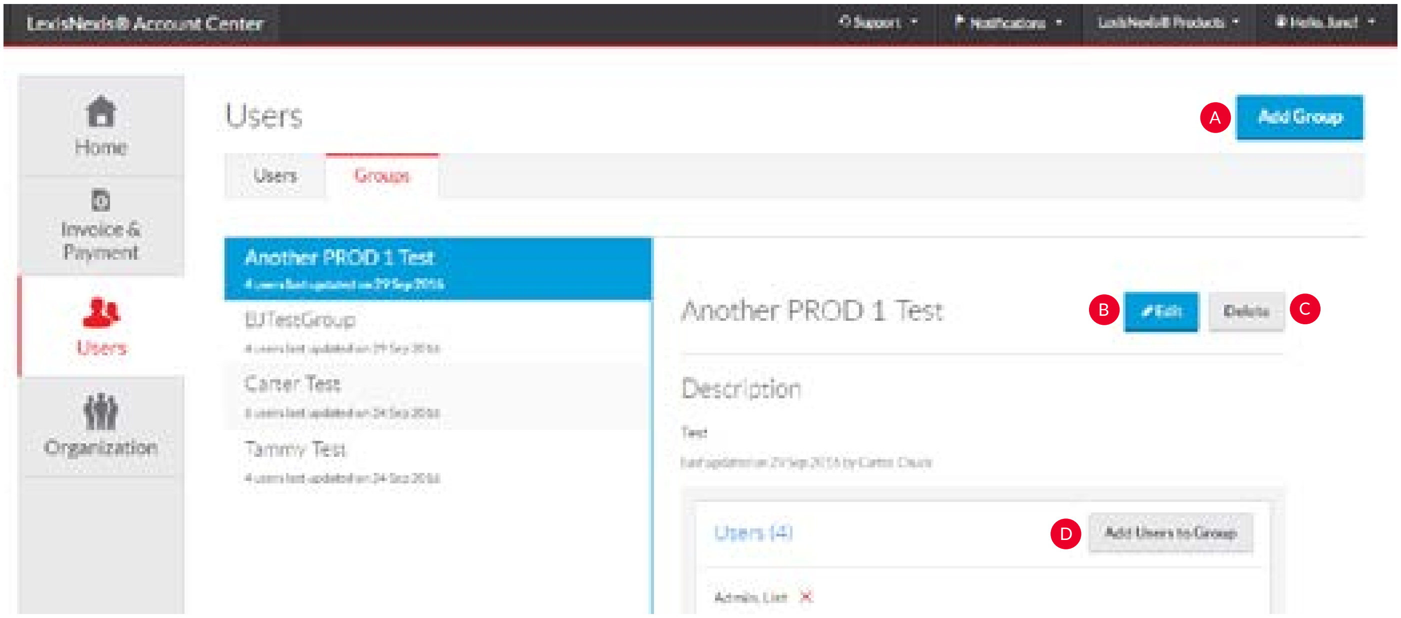
Users: Add Group

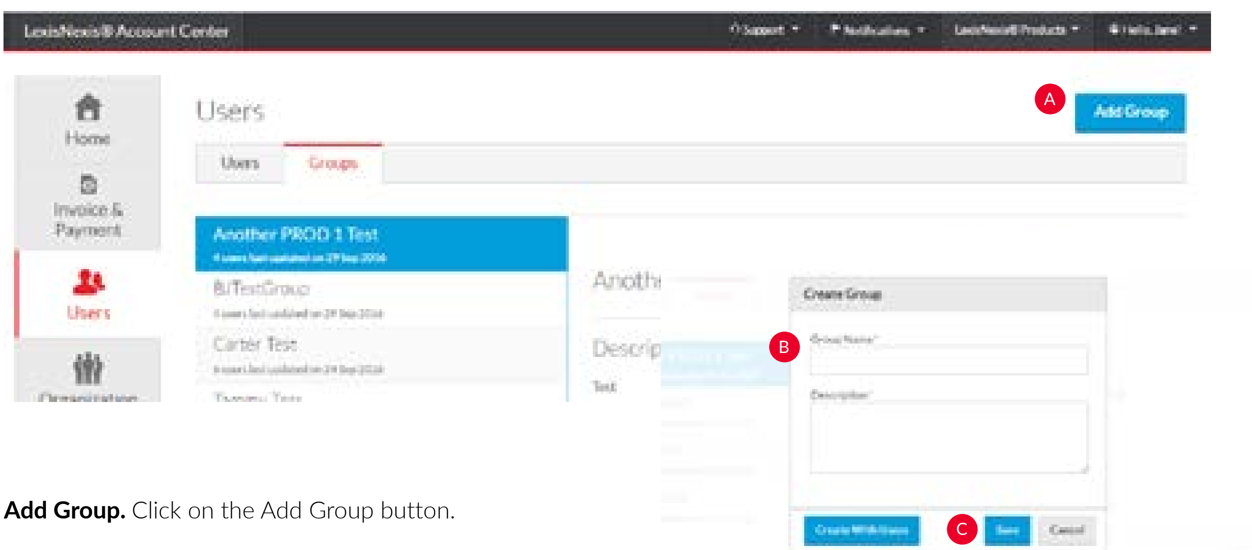


A **Add Group.** Click on this button to add a group.

B **Edit.** Click this button to Edit group name and/or description.

C **Delete.** Click on this tab to delete a group. Confirm deletion in the pop-up box.

D **Add Users to Group.** Click on this button to add users to a Group.

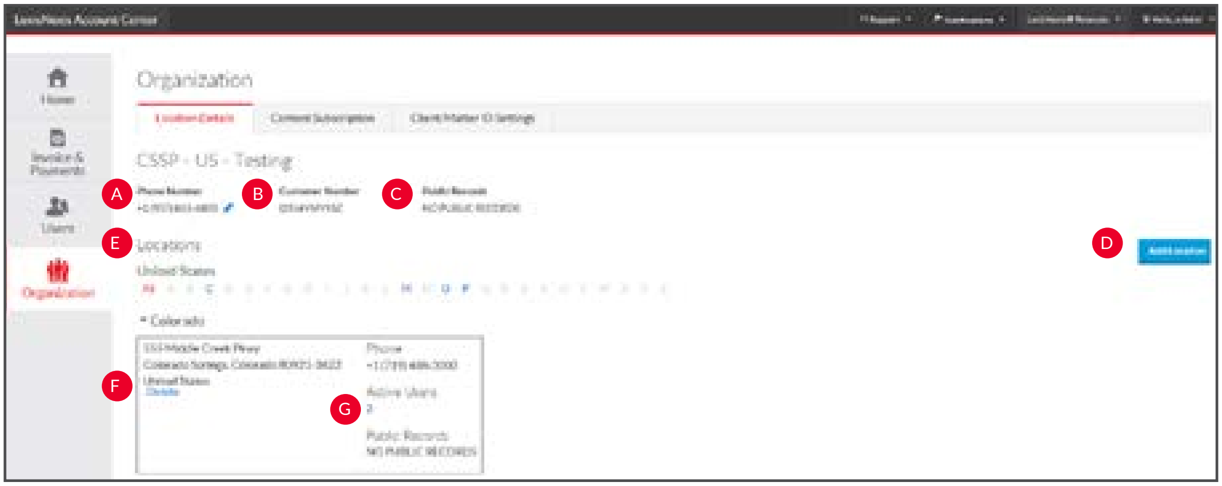


A **Add Group.** Click on the Add Group button.

B **Enter Name.** Enter a Name and Description for the Group.

C **Save or Create.** Either Select Save or Create With Users.

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**. The Customer Number is your account identifier.

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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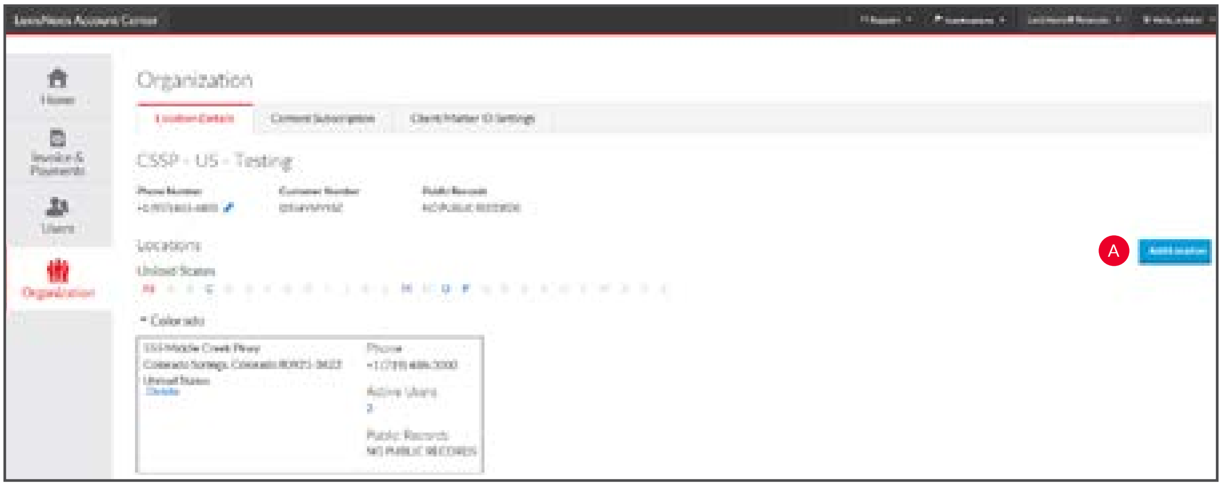
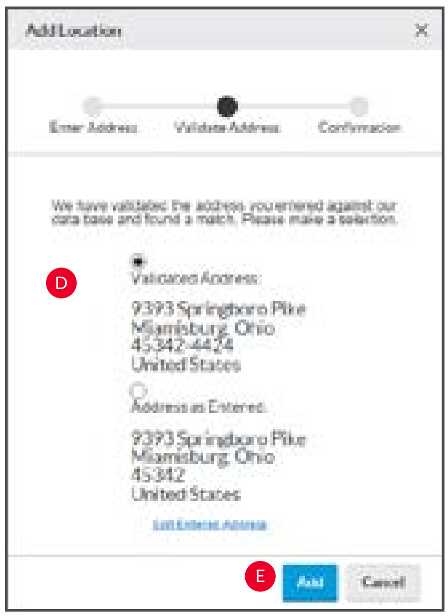
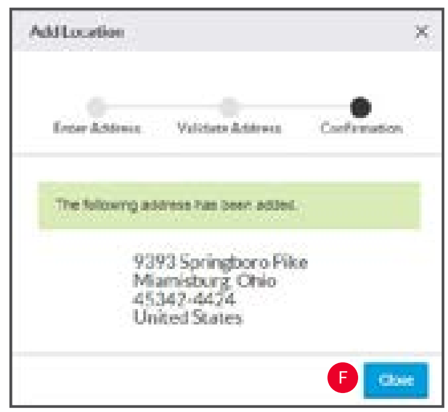
Organization: Add Location







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

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

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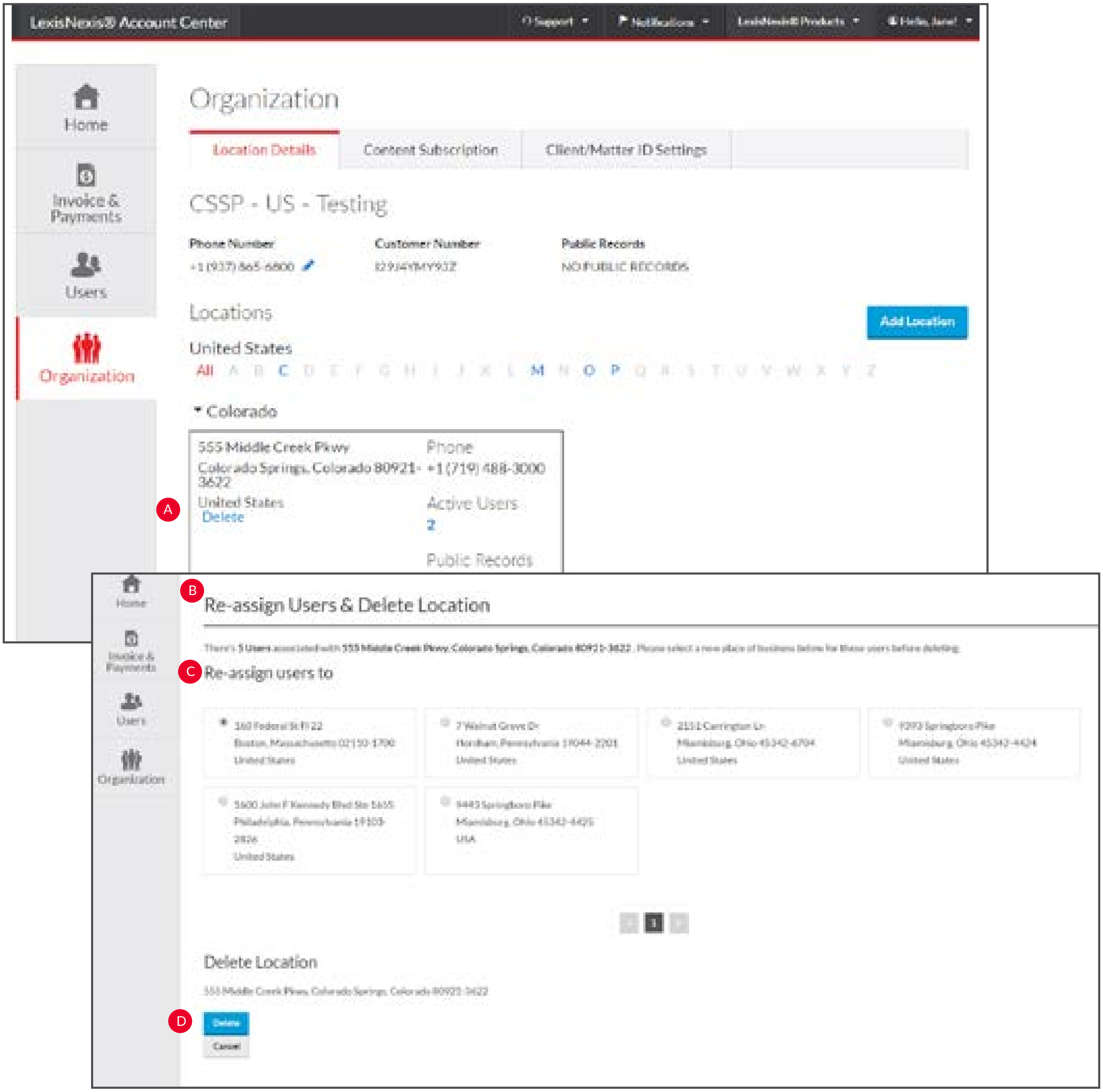
Organization: Delete Location



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

- (A) **Delete Link.** Identify the location you want to delete and click the **Delete** link.
- (B) **Re-assign Users and Delete Location Page**. 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) **Location.** Select the new location you want to assign the users to.
- (D) **Delete.** Select Delete under delete location.

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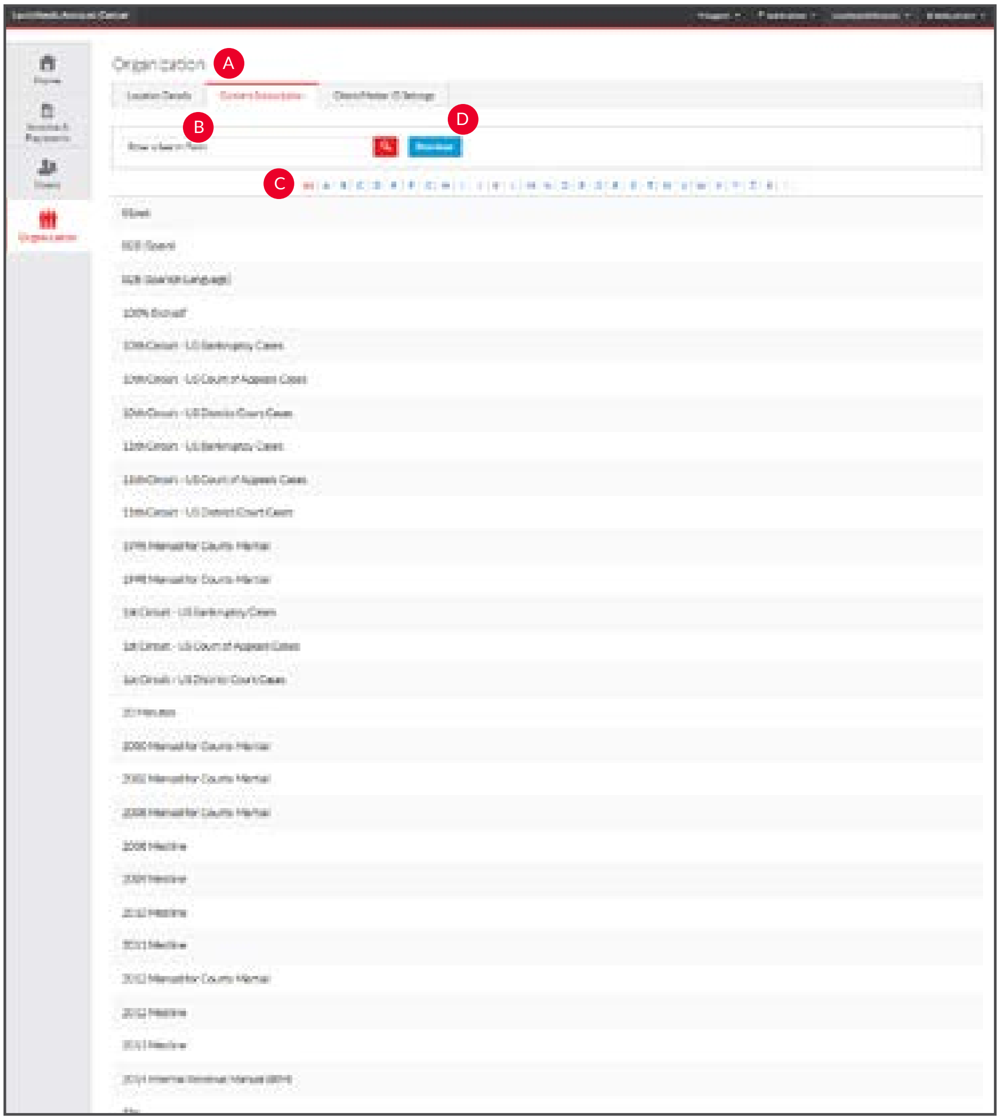
Organization: Content Subscription



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

(A) **Content Subscription.** Select the Content Subscription tab.

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

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

(C) **Alphabetical List.** 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.

(D) **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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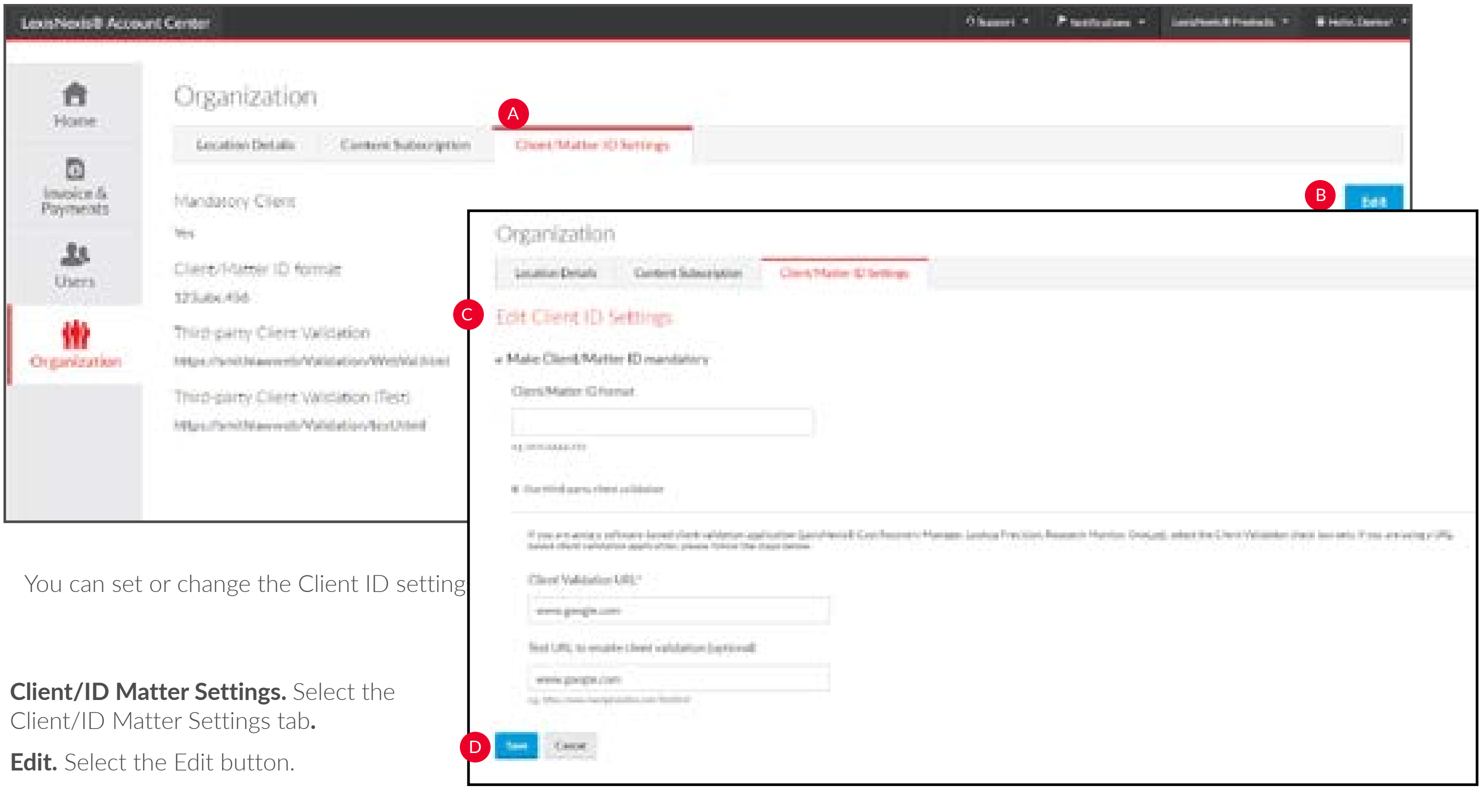
Organization: Client Matter



You can set or change the Client ID setting

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

B **Edit.** Select the Edit button.

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

D **Save.** 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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