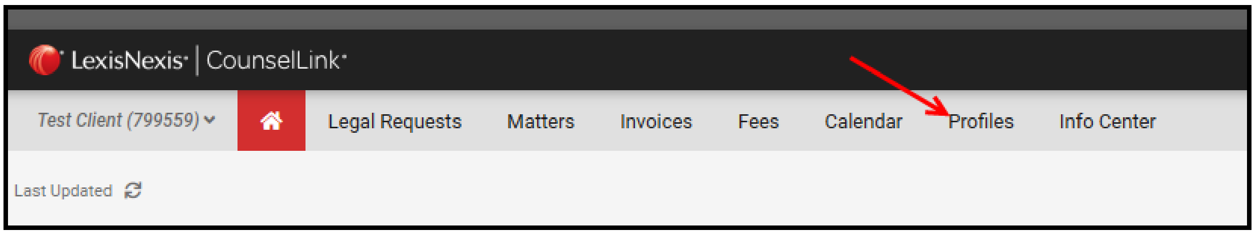
How to Add a New Office to an Existing CounselLink Account

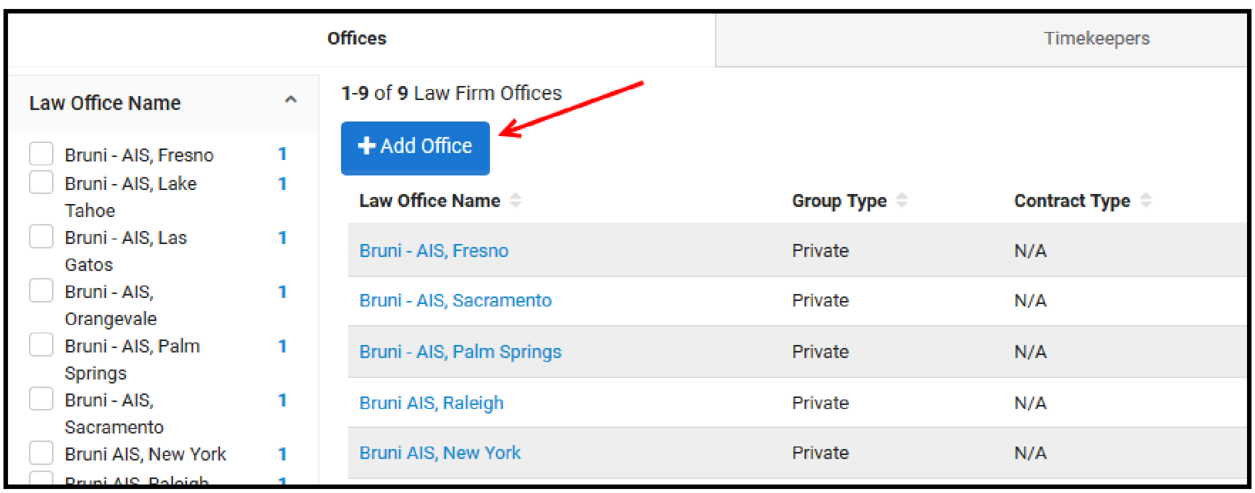
How to Add Timekeepers from an Existing Office to a New Office

How to Add a New Office to an Existing CounselLink Account

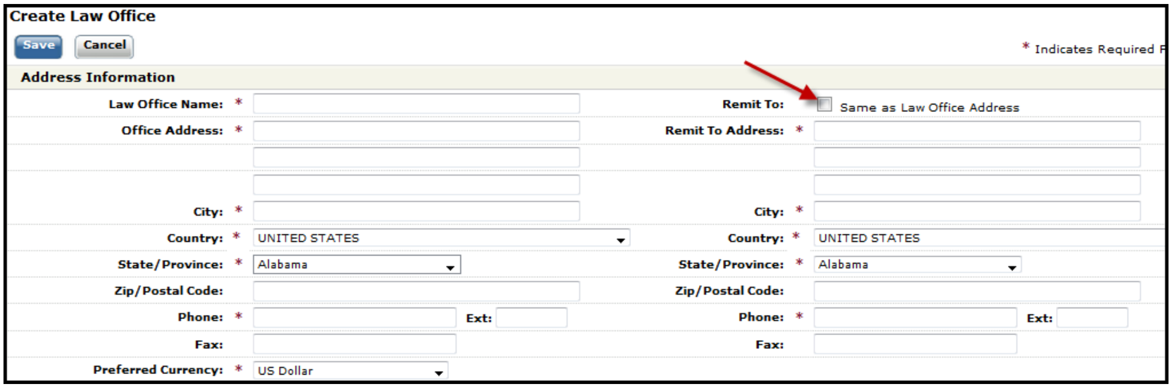
On your CounselLink **Home** page, click the **Profiles** link:



This will take you to your **Law Firm** Profile. On this page, click the **Add Office** button:



Now you can simply enter in the new office information. Check the “Remit To” box if the remit to address is the same. If it is different, leave the box unchecked and fill in the correct remit to address.



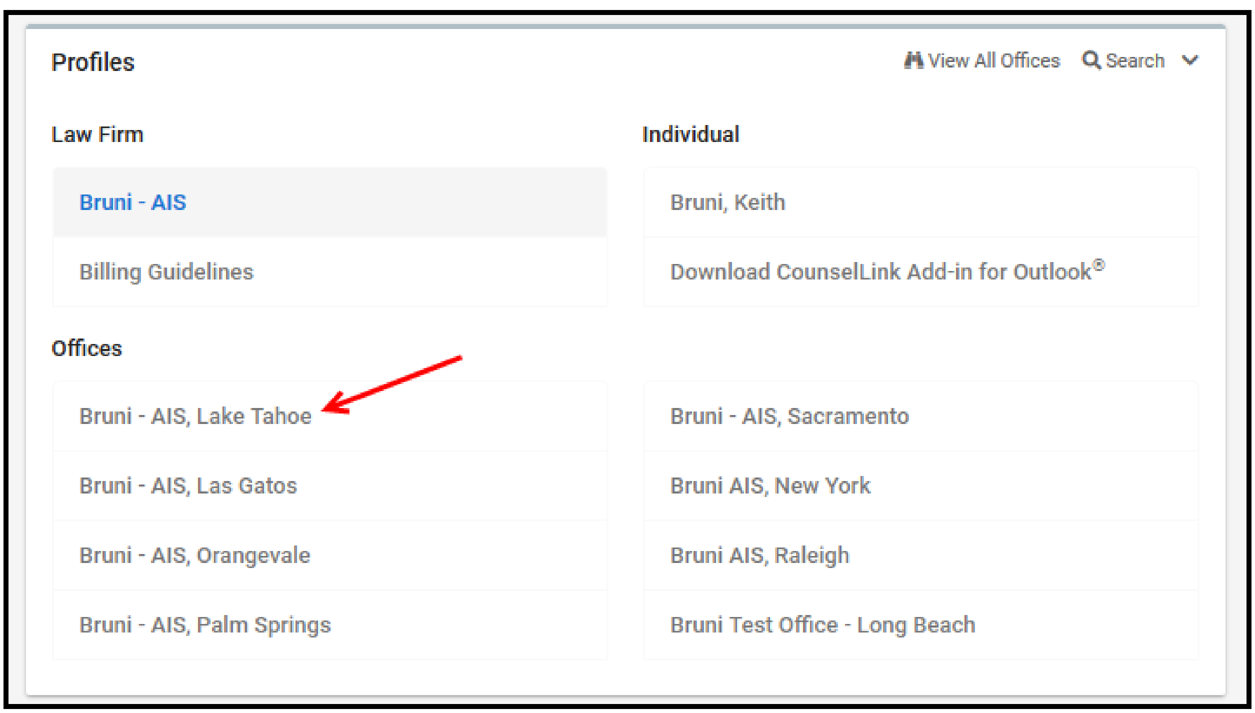
Click **Save**.

Once you have created the new office(s), you can then add any timekeepers that bill your client to their respective offices and submit their rates.*

*Once you have added a new office profile, it will need to be associated with your client. Please email attorneyimplementation@lexisnexis.com to have this step completed.

How to add timekeepers

On your CounselLink Home page, click the link to the office profile you want to add the timekeepers **to**:



Scroll down to the Office Staff section and click the **Edit Roles** button:

Office Staff

Edit Roles | Add User | Import Timekeepers | Export Timekeepers

Name	Role(s) in this office	
Bruni, Keith	Partner, Practicing Attorney, Budget Contact, Admin, Accts Payable Contact, Accts Receivable Contact, Matter Change Approval Contact	Active
Hankiness, Thomas	Practicing Attorney, Budget Contact, Document Administrator, Admin, Accts Payable Contact, Accts Receivable Contact, Matter Change Approval Contact	Active
Hanking, Tom	Partner, Practicing Attorney, Budget Contact, Document Administrator, Admin, Accts Payable Contact, Accts Receivable Contact, Matter Change Approval Contact	Removed

You will now see all timekeepers listed in all your other offices. You can simply check any one of the boxes next to the names of the individuals you want to add and click **Save**:

Assign Office Roles: Bruni - AIS, Lake Tahoe

Save | Cancel

Individual Roles

Name	Practicing Attorney	Budget Contact	Document Administrator
Bruni, Bernie	☐	☐	☑
Bruni, Keith	☑	☑	☐
Corsault, Michelle	N/A	☐	☐
Dandy, Jim	☐	☐	☐
Dandy, JIm	☐	☐	☑
Effed, Justin	N/A	☐	☐
Franks, Tom	☐	☐	☐
Hankiness, Thomas	☑	☑	☑
Hannoonen, Jim	N/A	☐	☑
HO, Don	☐	☐	☐
	Practicing Attorney	**Budget Contact**	**Document Administrator**
Jenkins, Tim	☐	☐	☐
Login, Help Files	N/A	☐	☐
Mirano, Kristie	☐	☐	☑
Pembroke, Dewey J	☐	☐	☐
Tinker, Timmy	N/A	☐	☑

You will now see all the timekeepers added.

Office Staff

Edit Roles | Add User | Import Timekeepers | Export Timekeepers

Name	Role(s) in this office
Bruni, Bernie	Document Administrator
Bruni, Keith	Partner, Practicing Attorney, Budget Contact, Admin, Accts Payable Contact, Accts Receivable C Approval Contact
Dandy, JIm	Document Administrator
Hankiness, Thomas	Practicing Attorney, Budget Contact, Document Administrator, Admin, Accts Payable Contact, Ac Matter Change Approval Contact
Hanking, Tom	Partner, Practicing Attorney, Budget Contact, Document Administrator, Admin, Accts Payable Co Contact, Matter Change Approval Contact
Hannoonen, Jim	Document Administrator
Mirano, Kristie	Partner, Document Administrator
Tinker, Timmy	Document Administrator