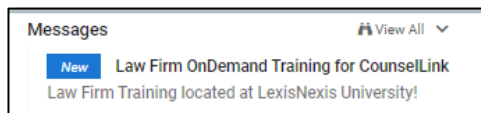


HELP RESOURCES

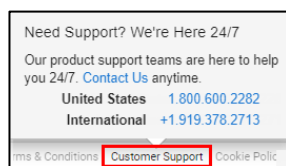
Message Center

1. Locate the Messages panel on the Home page.
2. Access CounselLink news, events, and information about the free training videos.



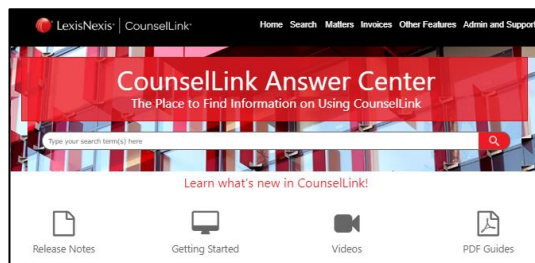
Customer Support

1. Click the Customer Support link at the bottom of the Homepage.
2. Use the Contact Us email link or phone number for assistance.



Help Center

1. Click the Help icon in the upper right corner of any page.
2. Select Help Center from the menu.
3. Choose a topic from the top menus, perform a keyword search for relevant topics, or select icons to access documents and videos.



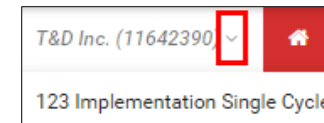
LexisNexis University

1. Navigate to <https://www.lexisnexis.com/university/>
2. Log in or Register as a new user to access free training.

CUSTOMIZE THE HOME PAGE VIEW

Select your Client

1. Click the Client drop-down menu to the left of the Home icon.
2. Choose the client.
3. Client selection is retained until you choose a different one.



Collapse or Expand panels to simplify the Homepage view

1. Click the arrow to collapse panels that are not used often.
2. Click the arrow again to expand a panel when you need to access it.



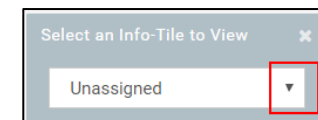
Reposition panels to make highly used features more prominent

1. Hover over the header of any panel until you see the 4-way directional arrow.
2. Drag and drop into your preferred position on the Home page.



Configure quick access tiles for easy access to lists of data

1. Click the Configure icon on any tile.
2. Use the menu to select an Info-Tile to view in that location.



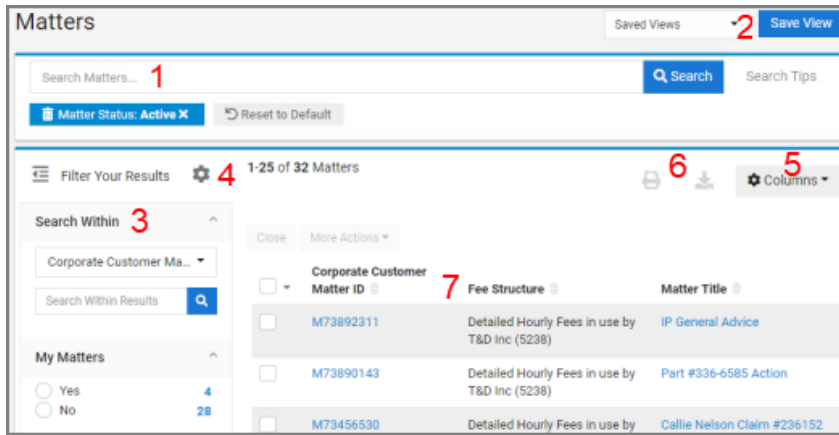
SEARCH FOR INFORMATION

Navigate the Search Page

1. Click a labeled tab to access a search panel.



2. Navigate the search page.



1. Keyword Search	2. Save View
3. Filter Panel	4. Customize Fileters
5. Column customization	6. Print/Export
7. Bulk action buttons	

Keyword Searching

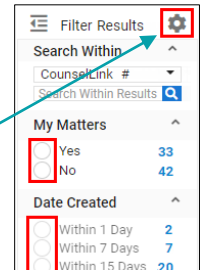
1. Select a search target
 - Use the dropdown menu on the homepage.
 - Select the appropriate search page.
2. Enter your keyword.
3. Click Search.



Filter Search Results

1. Check filter options to narrow search results
2. Click the configure icon to modify displayed filters.

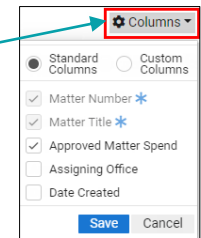
Filters are available for standard and some of your custom data



Configure Your Data View

1. Click the Edit Column icon to select data to display on the page.
2. Drag and drop columns in any order.

Columns are available for standard and some of your custom data



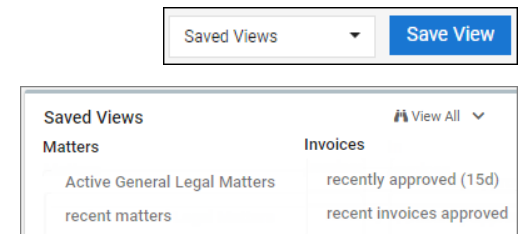
Create a Report from the Search Page

1. Conduct a search with keywords and/or filters.
2. Select one, many or all search results with a checkmark.
3. Click the Export icon to create an Excel report. Alternatively, click the Print icon to send it to a printer.



Save Frequent Search Configurations as Views

1. Click the Save View button.
2. Enter a name for the View.
3. Click Save.
4. Access Saved Views from the drop-down list on the search page or from the Homepage panel.

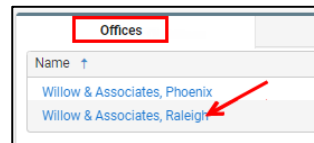
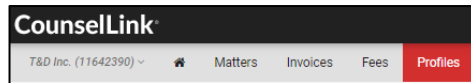


REVISING TIMEKEEPERS, FEES AND RATES

Add New Timekeepers

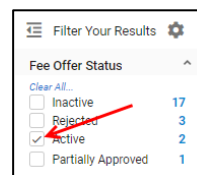
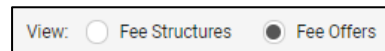
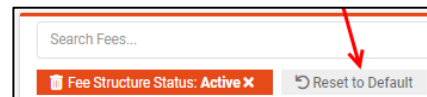
In order to submit charges, a timekeeper must be added to CounselLink and have their rates added to a fee offer. Remember the fee offer must be approved by the client before invoicing.

1. Click on the Profiles tab and select the Law Firm profile.
2. Select an Office from the Offices Tab.
3. Scroll down to the Office Staff and click Add User.
4. Complete the required fields.
5. Click Save.



Locate a Fee Offer

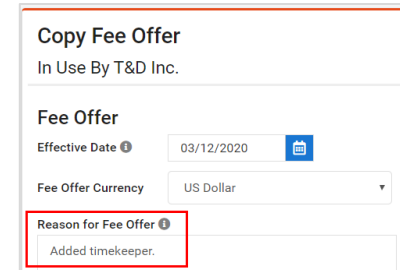
1. Access the Fee Search page.
 - From the Home page, click the Offer/Update Fees link.
 - Select the Fees tab.
2. Click the Reset to Default button to show all active results.
3. Click the View Fee Offers button, in the upper right corner.
4. Select Active Fee Offers with the Status Filter.
5. Click a Fee Offer Id to open a current active offer.



Fee Offer Id	Fee Structure Name	Fee Structure Id	Law Office Name	Fee Offer Status	Effective Date
5029873621	Detailed Hourly Fee	5238	Willow & Associates,	Active	01/23/2020

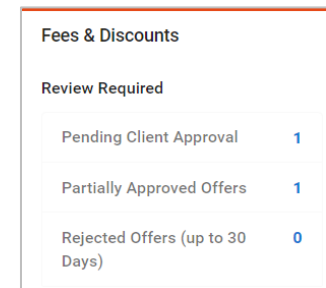
Revise a Fee Offer

1. Select the Plus icon to copy the existing fee offer.
2. Confirm today as the Effective Date or change it.
3. Type a Reason for the Fee Offer.
4. Edit or add Stage Structure Rates.
5. Edit or add Timekeeper Rates, add Reason for Rate Change where appropriate.
6. Click Save. to complete the revised offer.
7. Click Yes to confirm the request for fee offer approval. The client is notified by email to review the fee offer.



Monitor Fee Offer Status

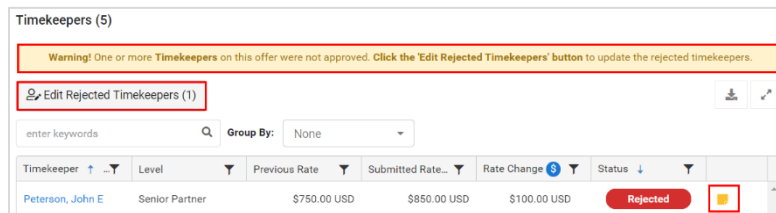
1. Locate and view the Fees & Discounts container on the home page.
2. Links in the container will show current count and allow navigation to fee offers.
 - **Pending Client Approval:** The client has been notified of these offers via email, but still needs to accept or decline them.
 - **Partially Approved Offers:** Indicates that some fees and rates on these offers were accepted while others were rejected. Invoicing for the approved portion can begin, but the rejected portion of the offers are pending resolution.
 - **Rejected Offers:** The client has reviewed and rejected these offers in the last 30 days. View the offers to see the reasons they were rejected by the client.



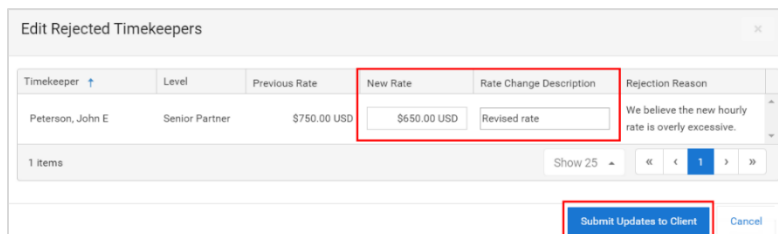
Resolve Rejected or Partially Approved Fee Offers.

The law firm will receive an email for any rejected or partially rejected fee offers. The homepage also lists the affected fee offers.

- In the Fees & Discounts container of the Homepage, click the Partially Approved or Rejected Offers (up to 30 days) link.
 - If only one fee offer is pending, the Fee Offer page displays.
 - If more than one fee offer is pending, the Fee Search page displays. Click the Fee Offer ID link for the appropriate offer to continue.
- Review the status and any notes that may have been added by the client.
- Edit the offer as needed.
 - Click Edit Rejected Timekeepers to modify rejected timekeeper rates.



- Enter the revised rates and reason.
- Click Submit Updates to Client. An email requesting review and approval is sent to the client.



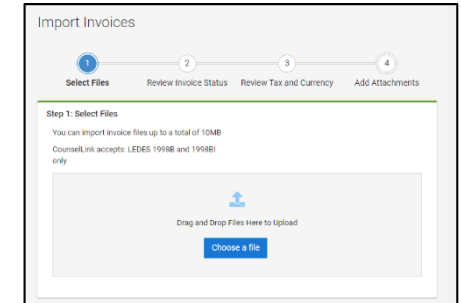
- A message displays to confirm the resubmission and the fee offer status changes to Resubmitted.

INVOICE SUBMISSION

If using the New Invoice Import feature, 1998B LEDES files allow you to manually enter tax and currency info.

Upload an Invoice

- From the Homepage, click the Import Invoice link.
- Click Choose File.
- Browse for and add invoice file.
- Click Next.
- Select Invoice and add documents if required.
- Click Send.

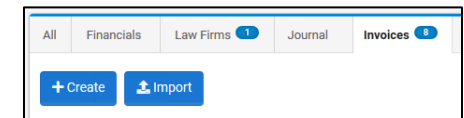


Email an Invoice

- See Help Center for a checklist on mailing invoices
- Send invoices to counsellinkinvoices@lexisnexis.com.

Manually Enter an Invoice

- Open a Matter.
- Click the Invoices Tab.
- Click Create.
- Enter required information.
- Click Save.
- Under the Charges Tab, click Add Fee or Add Expense.
- Attach documents to individual charges as needed.
- Once all charges are added. Click Activate at the top of the invoice.



TRACK INVOICE STATUS

Some clients allow law firms to review and appeal adjustments on invoices. Other clients reject invoices with charge errors and require submission of a new, corrected invoice. **Review your client's billing guidelines to resolve rejected invoices appropriately.**

The Home page Billing container shows the number of invoices in the following statuses:

- **Action Required for Collaborative Review** - Invoices were adjusted by the client while using the collaborative review feature. Action is required by the law firm before these invoices can be finalized.
- **Inactive / Incomplete** - Invoices that have been started by the law firm but have not been sent to the client.
- **On Hold** - Invoices ready to be sent to client, but the invoice cannot be sent because of a pending matter status.
- **Scheduled** - Some clients require that invoices are only sent during certain time periods. Invoices created prior to a pre-set billing day will be held in this status.
- **Rejected by Billing Guidelines Review** - Invoices sent to the clients and automatically rejected by the corporate client's billing guidelines. Review the billing guidelines.
- **Rejected by Client** - Invoices rejected by the client after passing the billing guidelines review.
- **Adjusted & Approved by Client** (up to 30 Days)- Invoices approved by the client within the last thirty (30) days after adjustments were made. Review the adjusted invoice for details.

Billing	
Invoices	
Action Required for Collaborative Review	4
Inactive / Incomplete	8
On Hold	0
Scheduled	0
Rejected by Billing Guidelines Review	12
Rejected by Client	2
Adjusted & Approved by Client (up to 30 Days)	0

RESOLVE REJECTED INVOICES

You may choose to upload a new invoice instead of editing the rejected one. Remember to delete the old invoice.

Rejected by Billing Guidelines Review

1. Click the Rejected by Billing Guidelines link on the Homepage.
2. Open a rejected invoice.
3. Click the Charges Tab.
4. Locate the red line items, they document rejection reasons.
5. Edit line items on the invoice.
6. Click Activate to resend invoice to client.

If a rejection needs to be overridden, contact your corporate client.

Rejected by Client

1. Click the Rejected by Client link on the Homepage.
2. Open a rejected invoice.
3. Click the Notes tab to view client comments.
4. Edit the invoice.
5. Click Activate to resend invoice to client.

VIEW PAYMENT STATUS

Some clients post invoice payment data. Set up a Saved View to locate recently approved invoices and view payment data.

1. Click the Invoice Tab.
2. Turn on search filters:
 - o Workflow Status Filter: select Approved.
 - o Last Invoice Approved Date Filter: select the date range.
3. Configure your columns to show payment data.
4. Click Save View button in the upper right corner.
5. Saved View is now available on the Homepage or from the Saved Views drop-down menu on the search page.

