



PowerInvoice™

# POWERINVOICE™ QUICK REFERENCE SHEET

## WHAT IS POWERINVOICE?

The LexisNexis® PowerInvoice™ service brings current, comprehensive LexisNexis® billing data and invoice images to your desktop. It maintains the current month plus up to 24 months of historical billing information and invoice images. PowerInvoice also allows you to view billing-related information such as usage reports.

### Accessing PowerInvoice

PowerInvoice may be accessed directly at <https://www.lexisnexis.com/NewPowerInvoice> or from within My Lexis™ by clicking the PowerInvoice hyperlink.

## INVOICES & OTHER DOCUMENTS

### Invoice Notifications

Invoices are delivered electronically via email to the identified Invoice Contact. Email will contain a PDF attachment of the invoice along with a link to PowerInvoice.

### Viewing an Invoice

To view a PDF version of an invoice online:

- Navigate to **Basic** tab
- Select desired date range; click **View**
- From the invoice list, click the **Invoice Number** hyperlink

### Viewing Open Items

Open items may include adjustments, credit memos and/or unpaid invoices.

- Navigate to **Open Items** tab
- Select desired date range; click **View**
- List of all **Open Items** will appear
  - For Invoices & Credit Memos: click **Item Number** to view details

### Setting up Payment Information

The PowerInvoice service provides you with the ability to make online payments against your invoices. To set up Payment Registration:

- Access Preferences and click **Account Management**
- Register Credit Card or Bank Information
- Select **Automatically Transfer Payment** if desired (Automatic payment option, if selected invoices are automatically paid)
- Enter all required data and click **Finished**

### Paying an Invoice

If Automatic Payment has not been set up, invoices will need to be paid manually.

- Navigate to **Open Items** to display only unpaid invoices and click **Pay Now** or click **Pay Now** next to unpaid invoices after a Basic invoice search
- Confirm Credit Card or Bank Information and click **Submit Payment**
- Click **Finish** at the Payment Confirmation screen

### Payment History

This feature gives you access to all of your account activity—invoices, payments, prior period credits—over the past 24 months.

- Navigate to **Payment History** tab
- Select desired date range and/or any additional search criteria, click **View**
- From the list view, review the desired data; Drill into hyperlinks to see any additional data

## BILLING DATA

The LexisNexis PowerInvoice service gives you quick access to up to 12 months (plus the current month) of LexisNexis billing data for your organization.

Billing data is updated daily and within 24–48 hours after research has been performed. Check the Process Through Date to see when data was last updated or has become final for the previous month.

### Search

Allows retrieval of final and preliminary billing data using various criteria including date range, report type and viewing options.

### Alerts

While viewing a report, billing searches can be saved as an Alert to receive automatic updates.

### Custom

Allows customer-defined dollar amounts or percentage rates to be set by activity description.

### Reallocation

Identify billable and non-billable items to reallocate charges.

### User-Defined

Select desired columns and order of columns to include in reports.

### Threshold Alerts

Define a threshold amount to receive email notification when a threshold is met.

### Allocation Profile

Identify items as billable, excluded or redistribute for enhanced cost recovery purposes.

## ANALYTICS

Charts and graphs can be created for customers using their existing billing data.

- Navigate to **Analytics** tab
- Click the **Create New Chart** sub tab
- Use the **Create Chart Profile** to create a chart/graph