LexisNexis®
PowerInvoice™
User Guide

May 27, 2016

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Getting Started with PowerInvoice

The PowerInvoice service brings current, comprehensive LexisNexis® billing data and invoice images to your desktop. With secured access via the Internet, LexisNexis legal research billing has never been easier. The PowerInvoice service maintains 12 full months of billing information and 24 months of invoice images.

What You'll Need to Use PowerInvoice

In order to use the PowerInvoice service, you'll need to:

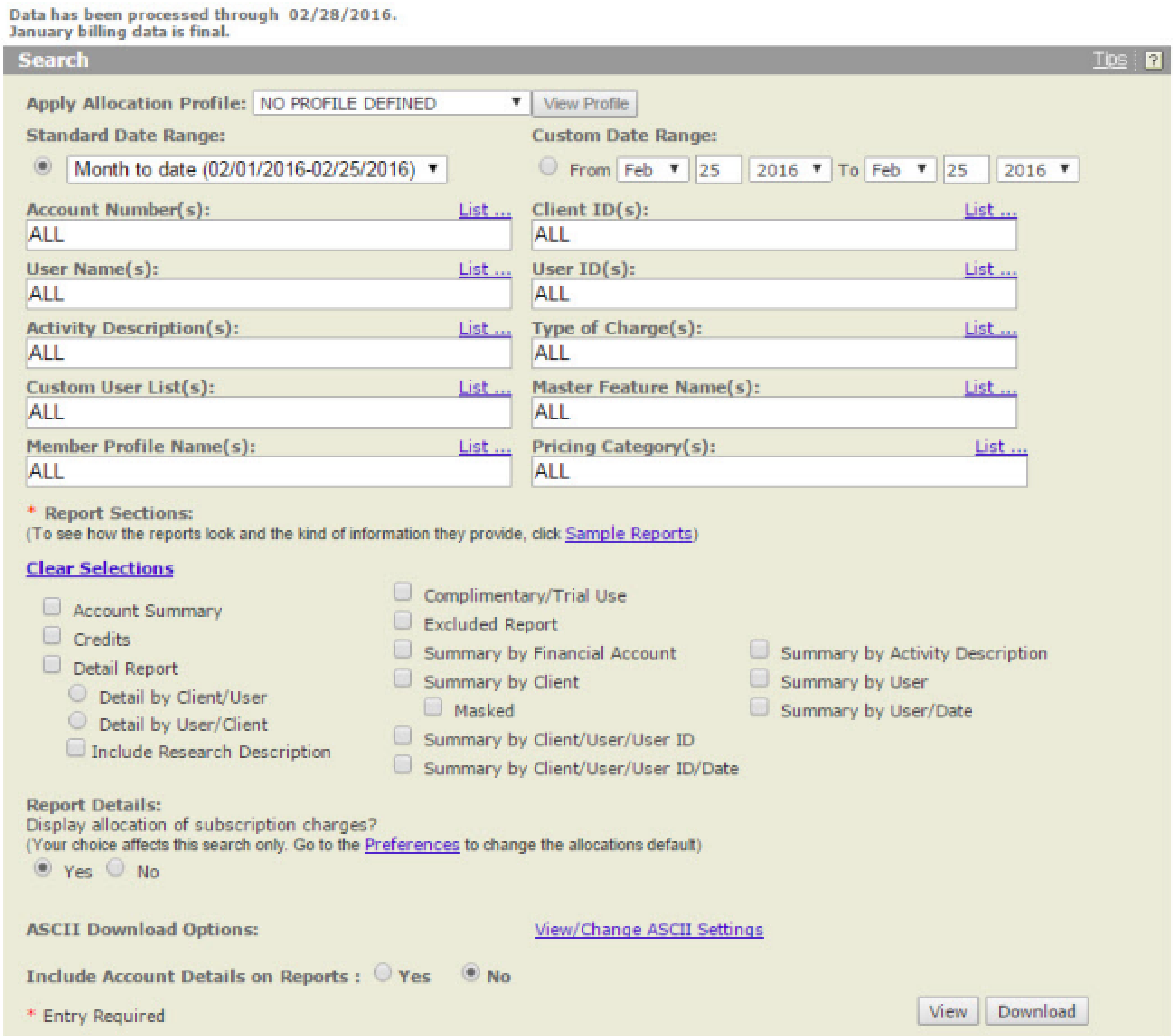
- Have LexisNexis PowerInvoice authorizations assigned to your Lexis Advance® ID
- Use one of these browsers or a higher version:
  - Microsoft® Internet Explorer® 11 on Windows® 8.1
  - Microsoft Internet Explorer 8 on Windows 7
  - Google™ Chrome™ 32.x
  - Firefox® 26.x
  - Safari® 7.x on Mac® OS 10.x

  These browsers are no longer supported:
  - Microsoft Internet Explorer 6.0
  - Microsoft Internet Explorer 7.0

How do I get started using PowerInvoice?

1. Open your browser and enter the PowerInvoice URL (www.lexisnexis.com/NewPowerInvoice) in the address field (or click the link from My Lexis™ to LexisNexis PowerInvoice.
2. Enter your ID and password and click **Sign In**.

Here's what you'll see:



On this page, you can:

- Choose from the available options on this page to retrieve reports showing document access, access charge, and other LexisNexis Activity Description charges.
- Click the **Invoices & Other Documents** tab to retrieve up to 24 months of invoice images.
- Click the **Preferences** link at the top of the page to change the way your reports are displayed. For example, you can change the default format for downloaded files.
- Click the **Sign Out** link to leave PowerInvoice.
- Click the **Help** link for complete information about how to use the service.

- If you would like access to the **Custom** and **Reallocation** tabs for further options, please contact your LexisNexis representative.

Legal Credits

Working with Billing Data

The LexisNexis PowerInvoice service gives you instant access to up to 24 months (plus the current month) of LexisNexis billing data for your organization. Just fill out a PowerInvoice search form to locate the one or more billing reports you want to retrieve. You can then browse through them online, print a copy of the ones you want or download the data to your PC.

How do I find billing data?

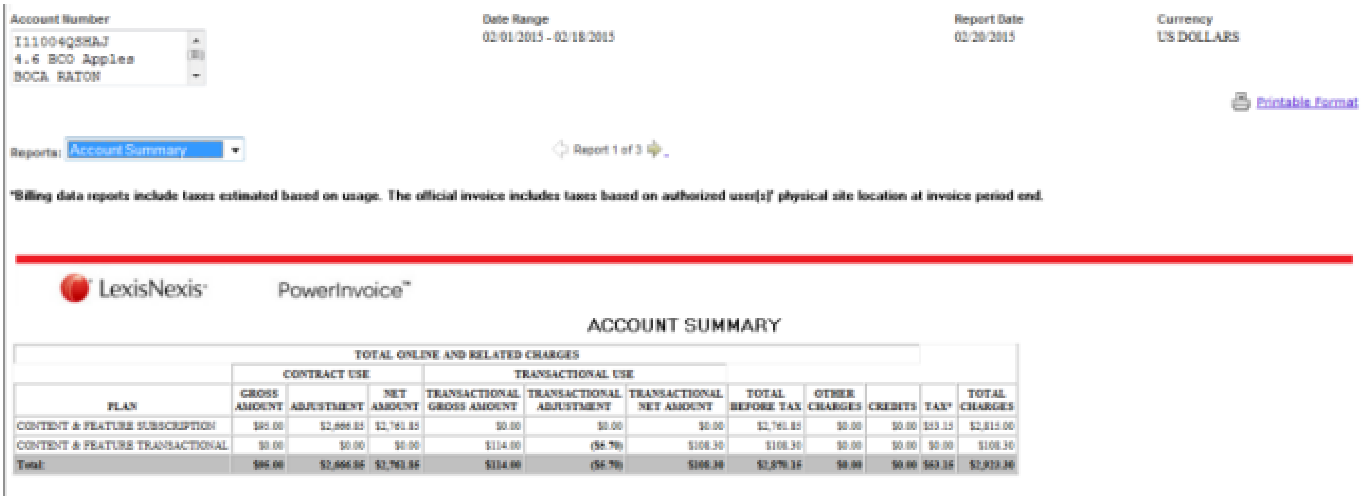
1. Choose options to find and format your report:
   - Review the date through which billing data is available above the gray bar.
   - Select a **Standard Date Range** to find billing data for a specified date range. You can select month to date; a single week in the past few weeks; any complete month within the previous twelve months; or a customized date range.
   - Click the **List...** link next to **Account Numbers** to see a list of possible sub-accounts.
   - Click the **Sample Reports** link to see how various reports look and what data they provide.
   - Click the **Clear Selections** link to clear all report sections selected.
   - Use the checkboxes to choose the report sections depending on the type of data you want to receive. (If your organization uses client masking and you need to see client IDs in the masked format, be sure to click "Masked".)
   - Use the **Report Details** options to choose whether to display allocation of subscription charges.
   - Choose whether or not you'd like to **Suppress Report Title**.
   - Click the **View/Change ASCII Settings** link to choose a download format.
   - Select your preference for **Include Account Details on Reports**. This includes the following additional information for the financial account at the bottom of your report: Name, Number, Place of Business/Address
2. Once you've made your selections, choose how you want to work with your report:
   - Click **View** to view the reports online.
   - Click **Download** to save the reports to your desired location.

How do I view billing data?

A retrieved billing report will look similar to the one below. At this point, you're ready to manage your billing data.

Options available while viewing billing data include:

- Click the **Save As Alert** link to save your billing search as an Alert.
- Use the **Reports** drop-down list to go directly to any report.
- Click the forward or back arrows to go directly to the next or previous report.



Account Number: I11004Q8HAJ 4.6 BCO Apples BOCA RATON
Date Range: 02/01/2015 - 02/18/2015
Report Date: 02/20/2015
Currency: US DOLLARS

Printable Format

Reports: Account Summary

Report 1 of 3

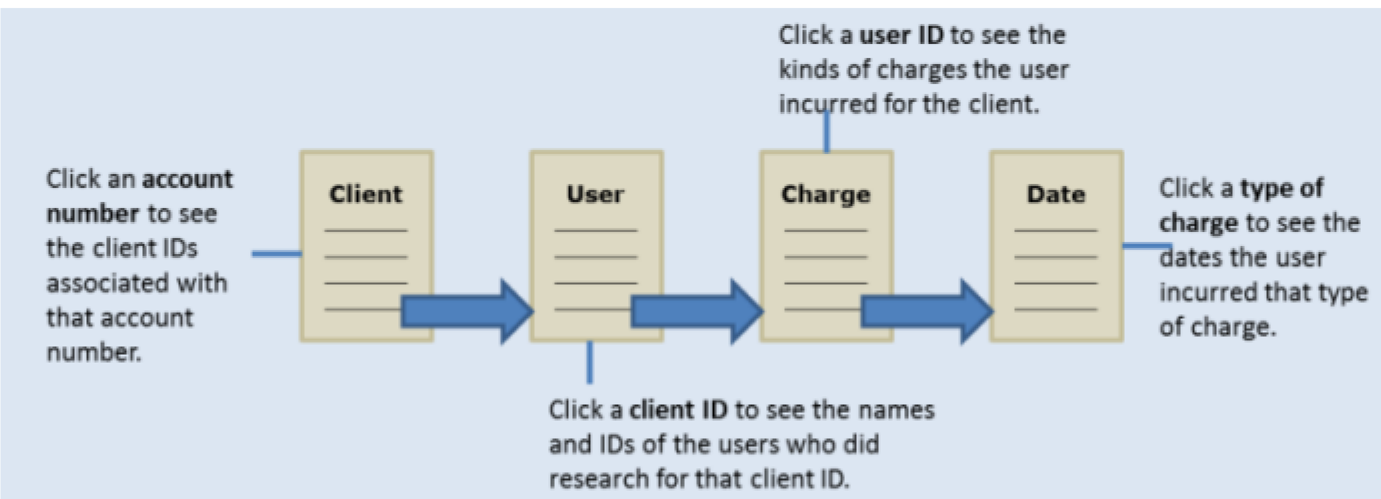
*Billing data reports include taxes estimated based on usage. The official invoice includes taxes based on authorized user(s)' physical site location at invoice period end.

LexisNexis® PowerInvoice™

ACCOUNT SUMMARY

	TOTAL ONLINE AND RELATED CHARGES										
	CONTRACT USE			TRANSACTIONAL USE							
PLAN	GROSS AMOUNT	ADJUSTMENT	NET AMOUNT	TRANSACTIONAL GROSS AMOUNT	TRANSACTIONAL ADJUSTMENT	TRANSACTIONAL NET AMOUNT	TOTAL BEFORE TAX	OTHER CHARGES	CREDITS	TAX*	TOTAL CHARGES
CONTENT & FEATURE SUBSCRIPTION	$95.00	$2,666.85	$2,761.85	$0.00	$0.00	$0.00	$2,761.85	$0.00	$0.00	$53.15	$2,815.00
CONTENT & FEATURE TRANSACTIONAL	$0.00	$0.00	$0.00	$114.00	($5.70)	$108.30	$108.30	$0.00	$0.00	$0.00	$108.30
Total:	$95.00	$2,666.85	$2,761.85	$114.00	($5.70)	$108.30	$2,870.15	$0.00	$0.00	$53.15	$2,923.30

The billing data you retrieve may contain several layers of data. The visual cue that can unfold more detail is the magnifying glass. This appears in front of any report category with more data. You can move through these layers easily by clicking the magnifying glass.

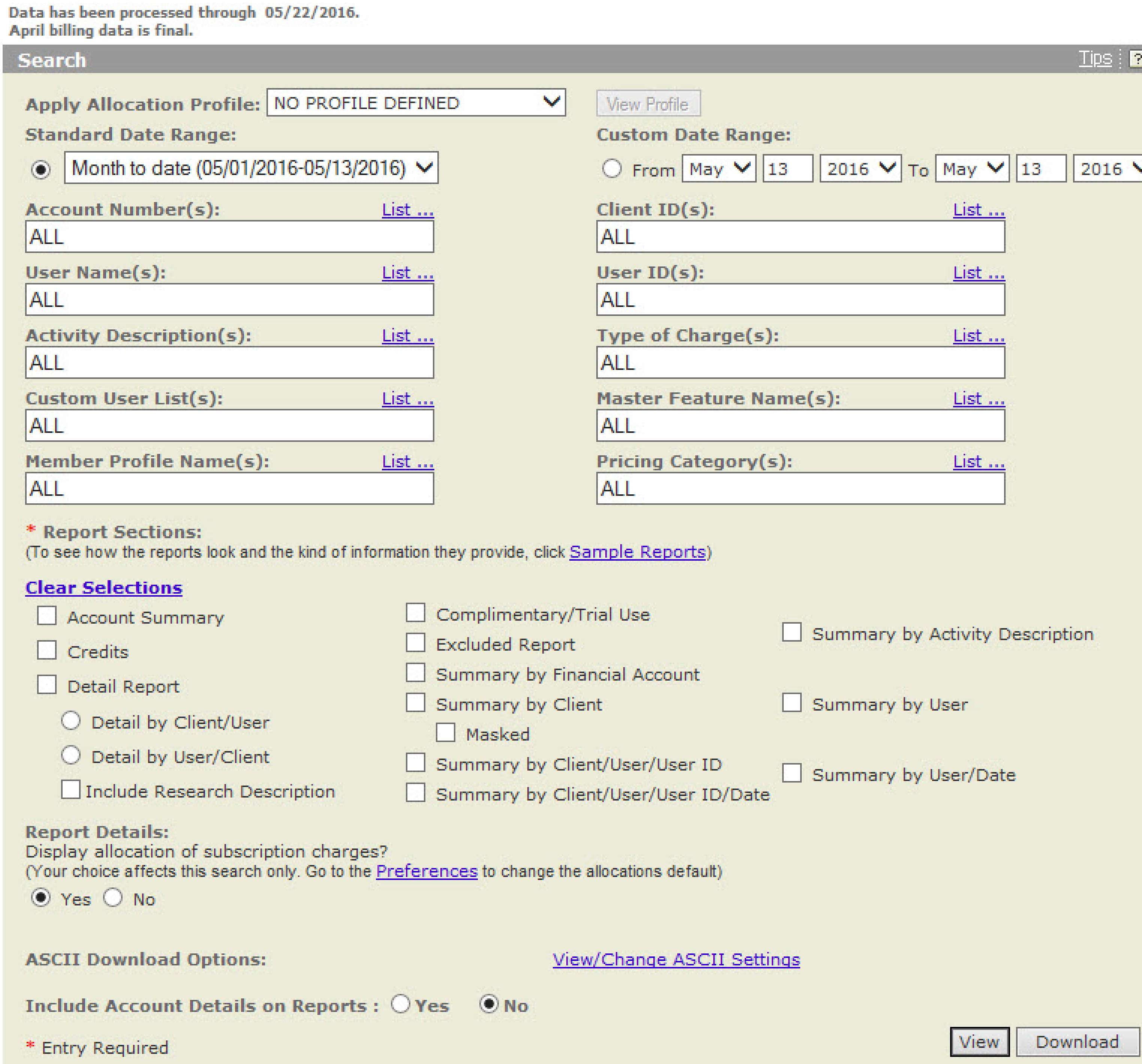


How do I download a billing report?

You can download billing reports to your PC so you can print or manage your data. Once you've made your selections:

- Click **Download** to proceed with the report download.
- Select one or more reports to download using the **Range** options.
- Choose a **Download Format**.
- Click the **View/Change ASCII Settings** link, if desired.
- Select your preference for **Include Account Details on Reports**. This includes the following additional information for the financial account at the bottom of your report: Name, Number, Place of Business/Address
- Click **Download**.

Tip:
To print billing reports, either download the report first or use the Printable Format feature.


Data has been processed through 05/22/2016.
April billing data is final.
Search
Tips
Apply Allocation Profile: NO PROFILE DEFINED
View Profile
Standard Date Range:
Month to date (05/01/2016-05/13/2016)
Custom Date Range:
From May 13 2016 To May 13 2016
Account Number(s): List ...
ALL
Client ID(s): List ...
ALL
User Name(s): List ...
ALL
User ID(s): List ...
ALL
Activity Description(s): List ...
ALL
Type of Charge(s): List ...
ALL
Custom User List(s): List ...
ALL
Master Feature Name(s): List ...
ALL
Member Profile Name(s): List ...
ALL
Pricing Category(s): List ...
ALL
* Report Sections:
(To see how the reports look and the kind of information they provide, click Sample Reports)
Clear Selections
Account Summary
Credits
Detail Report
Detail by Client/User
Detail by User/Client
Include Research Description
Complimentary/Trial Use
Excluded Report
Summary by Financial Account
Summary by Client
Masked
Summary by Client/User/User ID
Summary by Client/User/User ID/Date
Summary by Activity Description
Summary by User
Summary by User/Date
Report Details:
Display allocation of subscription charges?
(Your choice affects this search only. Go to the Preferences to change the allocations default)
Yes No
ASCII Download Options:
View/Change ASCII Settings
Include Account Details on Reports : Yes No
* Entry Required
View
Download

How do I email or print a report?

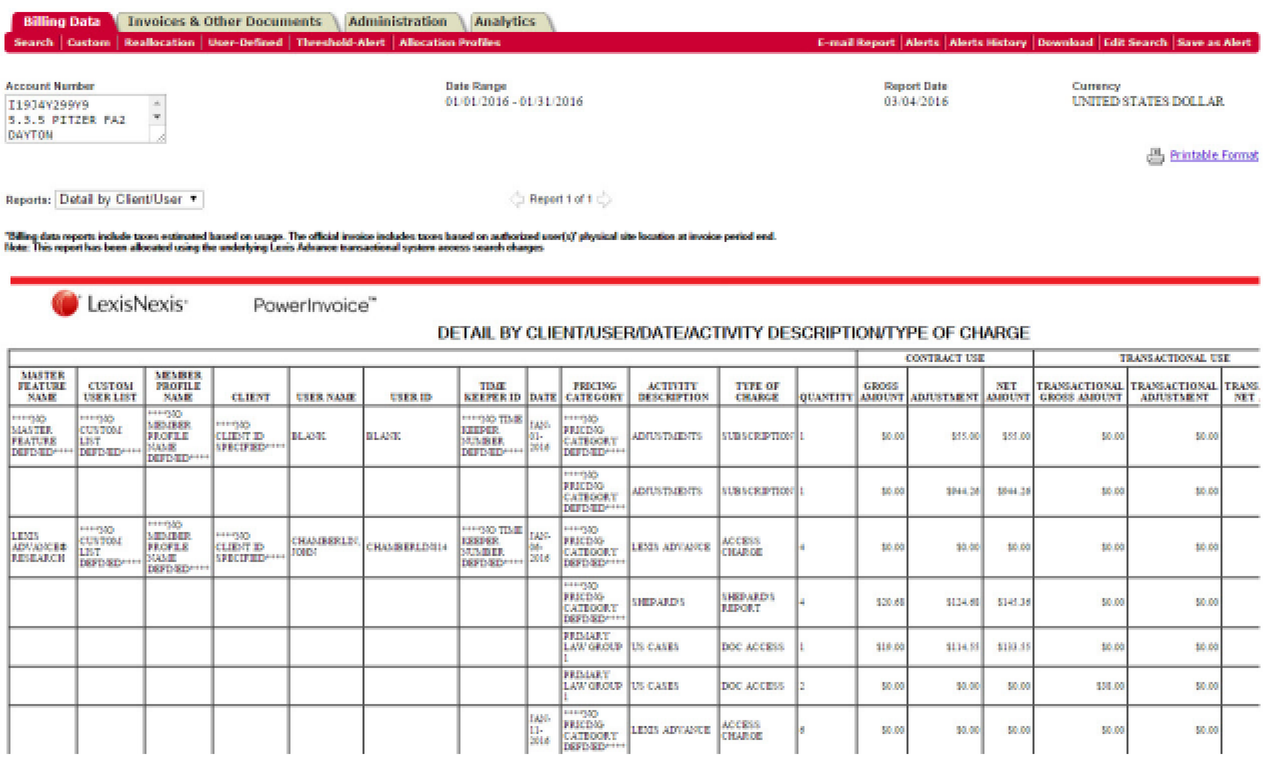
1. To send a PowerInvoice report to one or more individuals, click **Email Report**.
2. Enter email information, such as email address, subject and a message.
3. Select to compress the data file.
4. Select the format in which to send the report.
5. Click **Send Email** to send the report
6. Click **Printable Format** to generate a report in a printer-friendly layout.

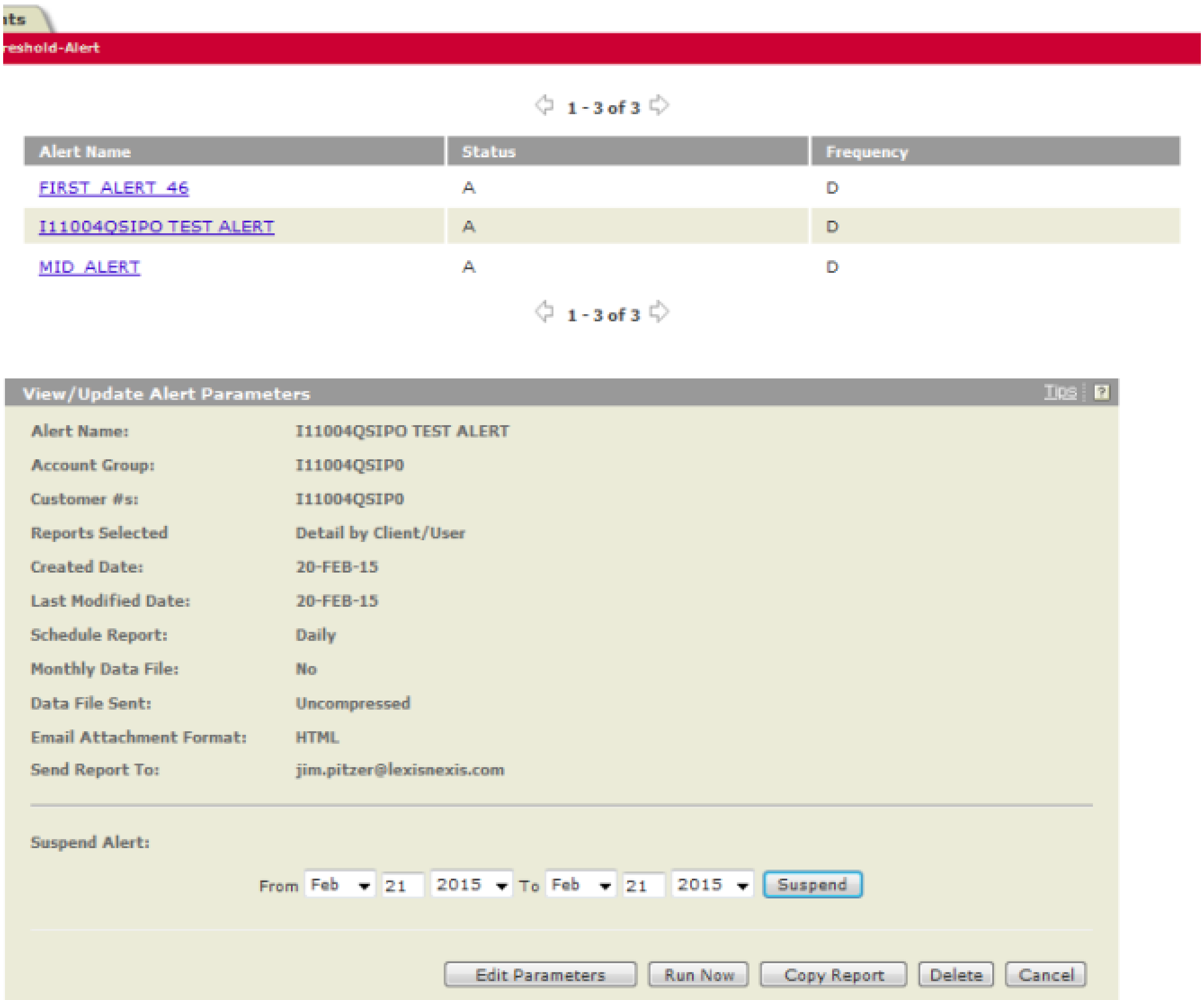
Alerts

How do I save an alert?

Once you find the appropriate billing data, you can save the billing search as an Alert to receive automatic updates.

1. Click **Save as Alert**.
2. Enter a name for the Alert.
3. Select an update frequency for your Alert results using the options under **Schedule Alert**.
4. Choose whether or not you want to receive a monthly data file.
5. Choose whether or not you want to receive the Alert file compressed or uncompressed (no zip software provided).
6. Select an email attachment format using the drop-down list.
7. Enter the **To**, **Subject**, and **Message** information.
8. Select **Finished** to save the Alert.



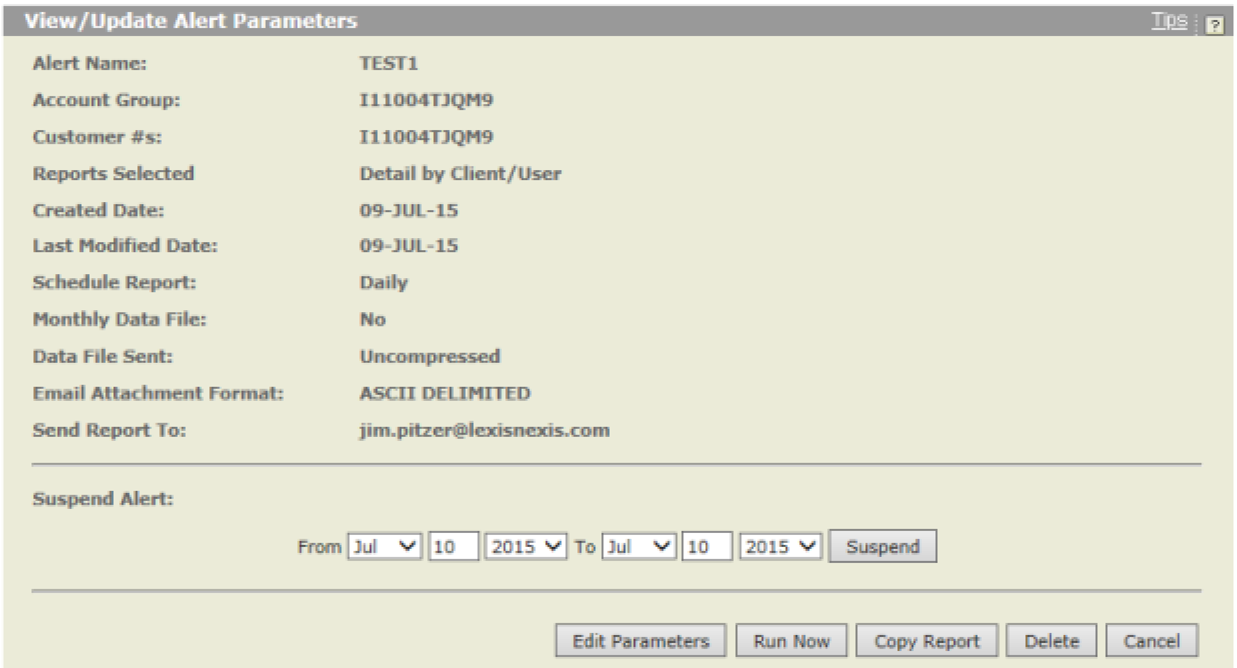


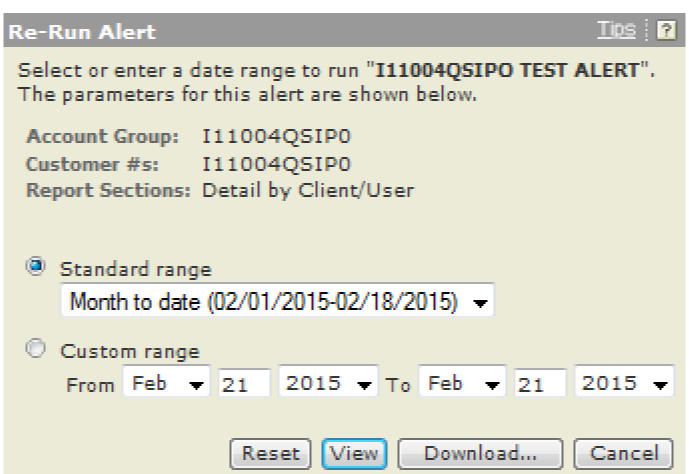
ts
reshold-Alert
1 - 3 of 3
Alert Name
Status
Frequency
FIRST_ALERT_46
A
D
I11004QSIPO TEST ALERT
A
D
MID_ALERT
A
D
1 - 3 of 3
View/Update Alert Parameters
Tips
Alert Name:
I11004QSIPO TEST ALERT
Account Group:
I11004QSIPO
Customer #s:
I11004QSIPO
Reports Selected
Detail by Client/User
Created Date:
20-FEB-15
Last Modified Date:
20-FEB-15
Schedule Report:
Daily
Monthly Data File:
No
Data File Sent:
Uncompressed
Email Attachment Format:
HTML
Send Report To:
jim.pitzer@lexisnexis.com
Suspend Alert:
From Feb 21 2015 To Feb 21 2015
Suspend
Edit Parameters
Run Now
Copy Report
Delete
Cancel

How do I view a saved alert?

You can view and make changes to any of your saved Alerts at any time.

1. Click **Alerts** to see a list of saved Alerts.
2. Click an Alert Name to view the report settings. Alert Name, Status and Frequency are displayed.
3. Select an **Alert Name** to see the report settings. The next screen displays the parameters for the Alert you selected.
4. To suspend an Alert for a specified period, enter a date range and click Suspend.
5. Click **Edit Parameters** to change any of the settings.



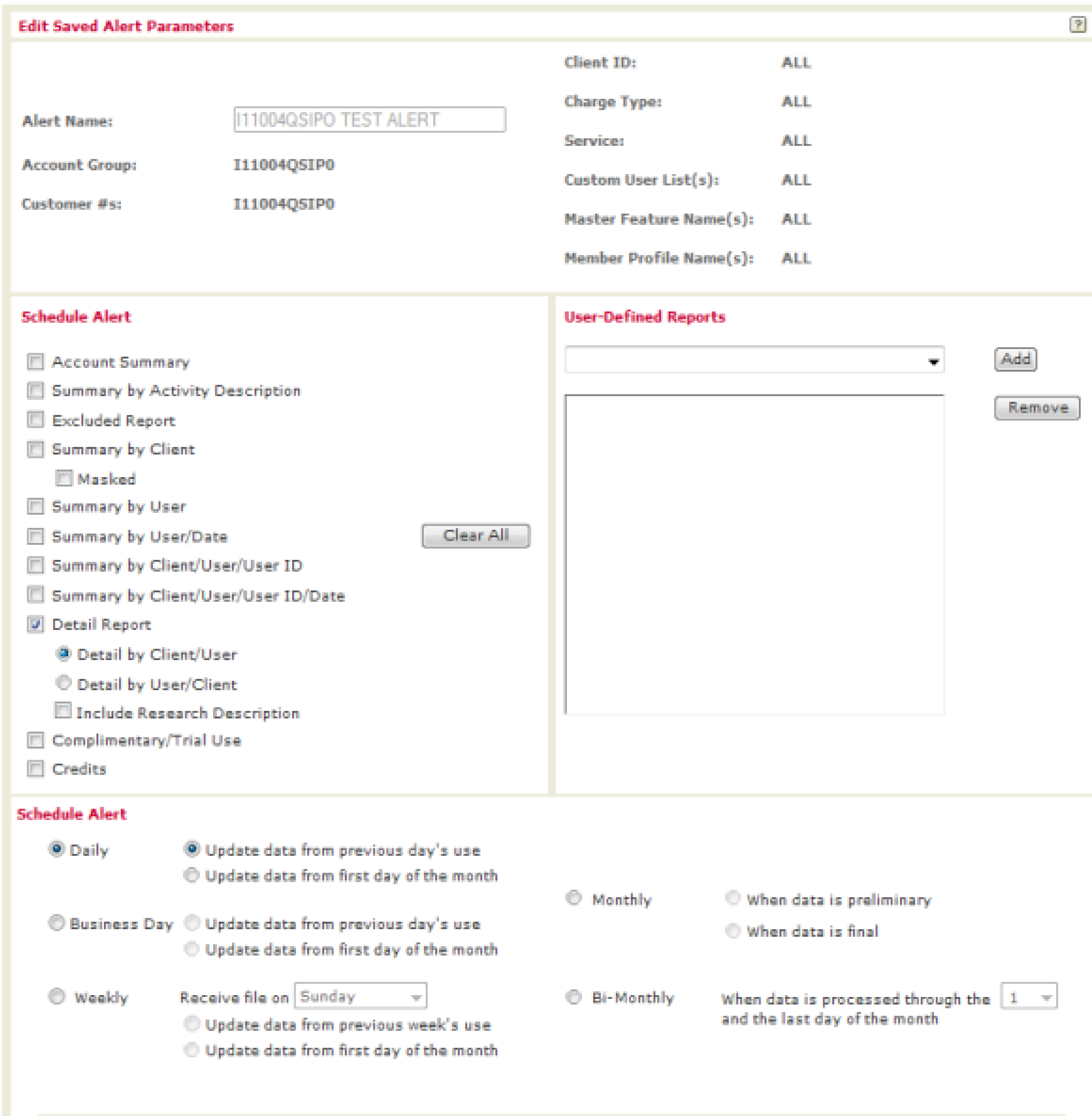


How do I edit saved alert parameters?

After selecting Edit Parameters, you can edit the parameters of a saved Alert.

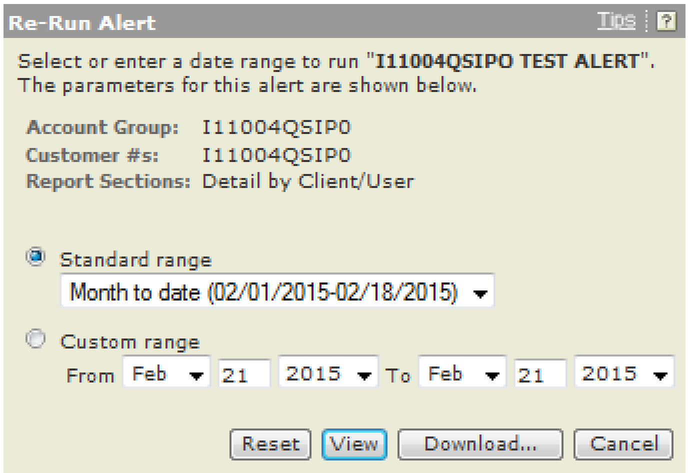
You can view or modify:

- Select a new report.
- Change Alert update frequency.
- Select whether you want to receive the file compressed and specify a download format.
- Change the report's recipients, subject, or message.
- Select **Finished** to save the Alert.



How do I update an alert?

You can choose to update Alert results at any time by clicking **Run Now**.

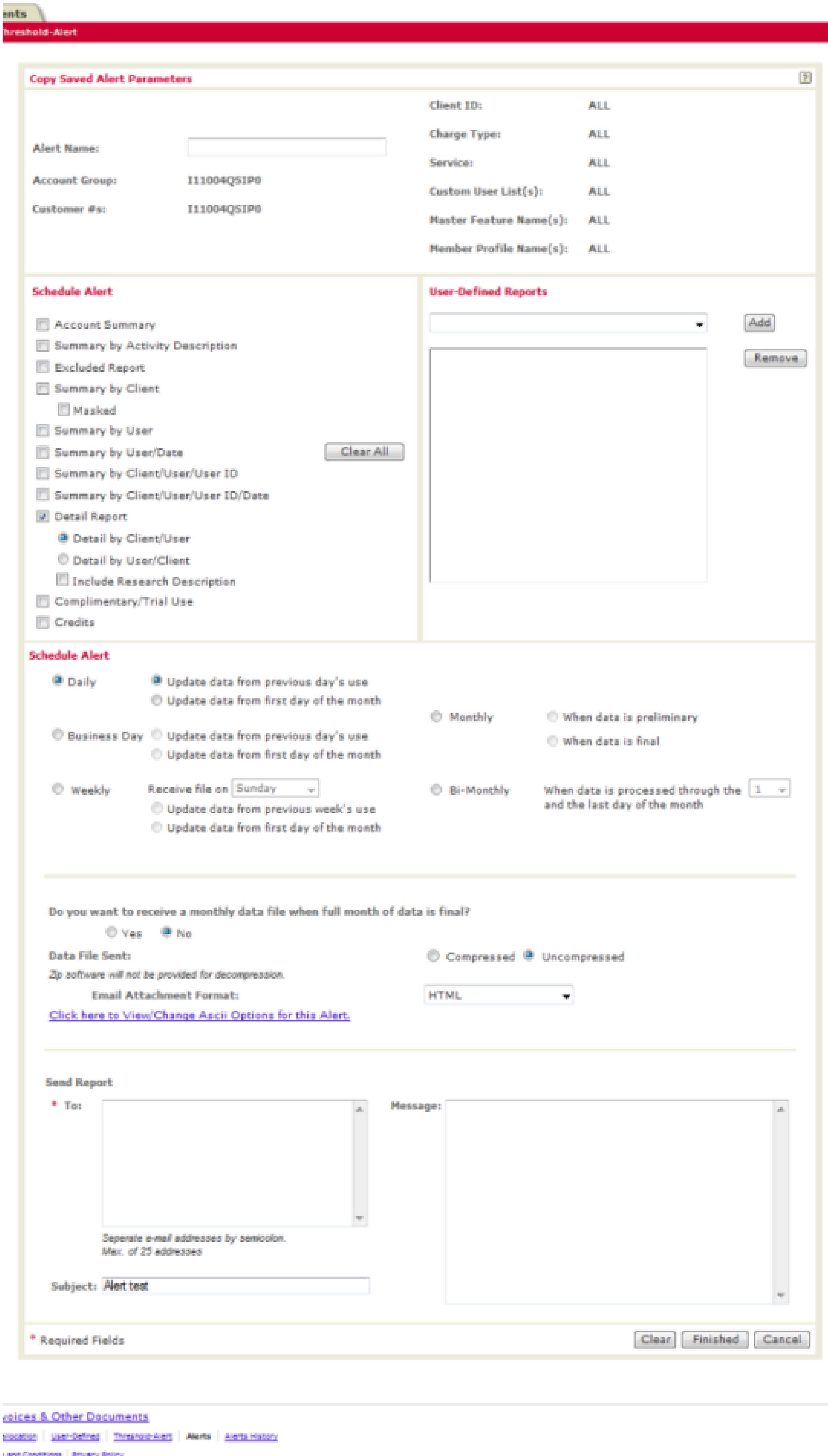


You can:

- Select a date range or specify your own date range.
- Choose an action:
  - Click **Reset** to reset date range selection
  - Click **View** to view report results
  - Click **Download** to download report data
  - Click **Cancel** to return to the previous screen

How do I copy saved alert parameters?

1. Enter an **Alert Name**.
2. Select a new report.
3. Choose options to **Schedule Alert**.
4. Select how you want to receive the file - compressed or specify a download format.
5. Change the report's recipients, subject, or message.
6. Select **Finished** to save the alert.


ents
hreshold-Alert
Copy Saved Alert Parameters
Alert Name:
Account Group: I11004QSIP0
Customer #s: I11004QSIP0
Client ID: ALL
Charge Type: ALL
Service: ALL
Custom User List(s): ALL
Master Feature Name(s): ALL
Member Profile Name(s): ALL
Schedule Alert
Account Summary
Summary by Activity Description
Excluded Report
Summary by Client
Masked
Summary by User
Summary by User/Date
Clear All
Summary by Client/User/User ID
Summary by Client/User/User ID/Date
Detail Report
Detail by Client/User
Detail by User/Client
Include Research Description
Complimentary/Trial Use
Credits
User-Defined Reports
Add
Remove
Schedule Alert
Daily
Update data from previous day's use
Update data from first day of the month
Business Day
Update data from previous day's use
Update data from first day of the month
Weekly
Receive file on Sunday
Update data from previous week's use
Update data from first day of the month
Monthly
When data is preliminary
When data is final
Bi-Monthly
When data is processed through the 1 and the last day of the month
Do you want to receive a monthly data file when full month of data is final?
Yes No
Data File Sent:
Compressed Uncompressed
Zip software will not be provided for decompression.
Email Attachment Format:
HTML
Click here to View/Change Ascii Options for this Alert.
Send Report
* To:
Message:
Seperate e-mail addresses by semicolon.
Max. of 25 addresses
Subject: Alert test
* Required Fields
Clear
Finished
Cancel
voices & Other Documents
Alerts
Alerts History

User-Defined Reports

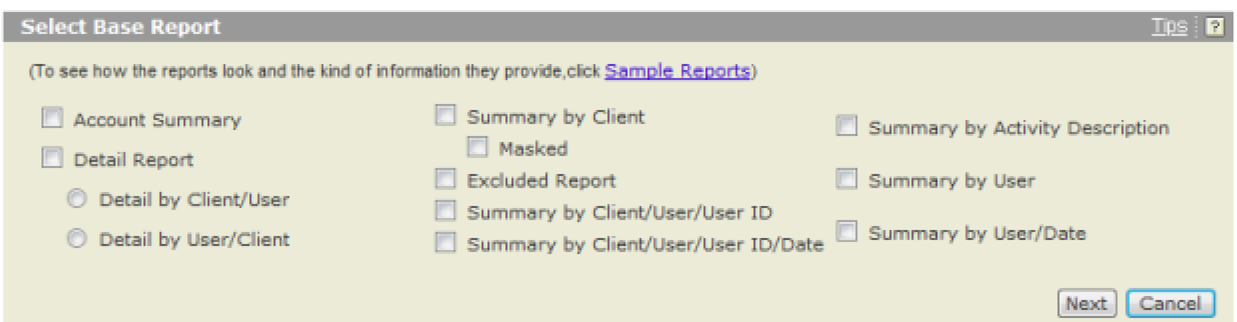
How do I create a report format?

You have the option of structuring your own report format using the User-Defined Reports page.

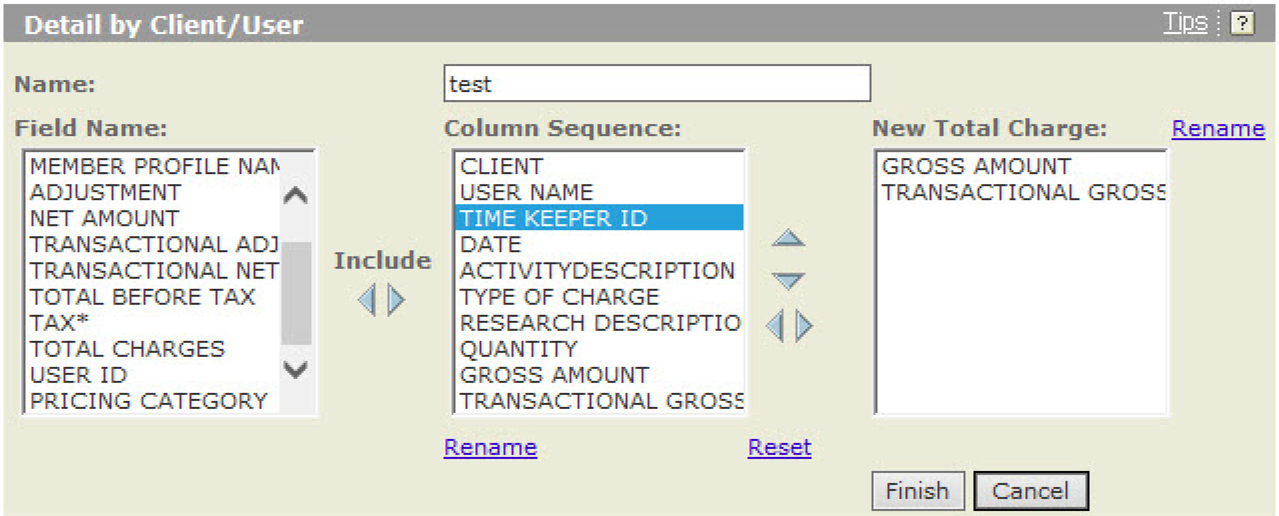
1. Click **Add** to create a new user-defined report format. The Select Base Report page appears, as shown below.
2. Select the desired PowerInvoice report.
3. Click **Next** to continue with creating a user-defined layout. The Detail by Client/User page appears, as shown below.
4. Provide a name for the user-defined layout.
5. Select data columns to include in the layout.
6. Click the right or left arrow to add or remove columns in the report.
7. Highlight the column name; then click the up or down arrow to set the order of the columns.
8. Double-click the field name or click **Rename** to change the column header.
9. If you select **Rename**, enter the new column header name.
10. Click **OK** to save the new header name.
11. The new column name appears in parentheses next to the old name.
12. Click **Finish** to complete the task.

Note:
A new Total Charge column is available in your user-defined reports.

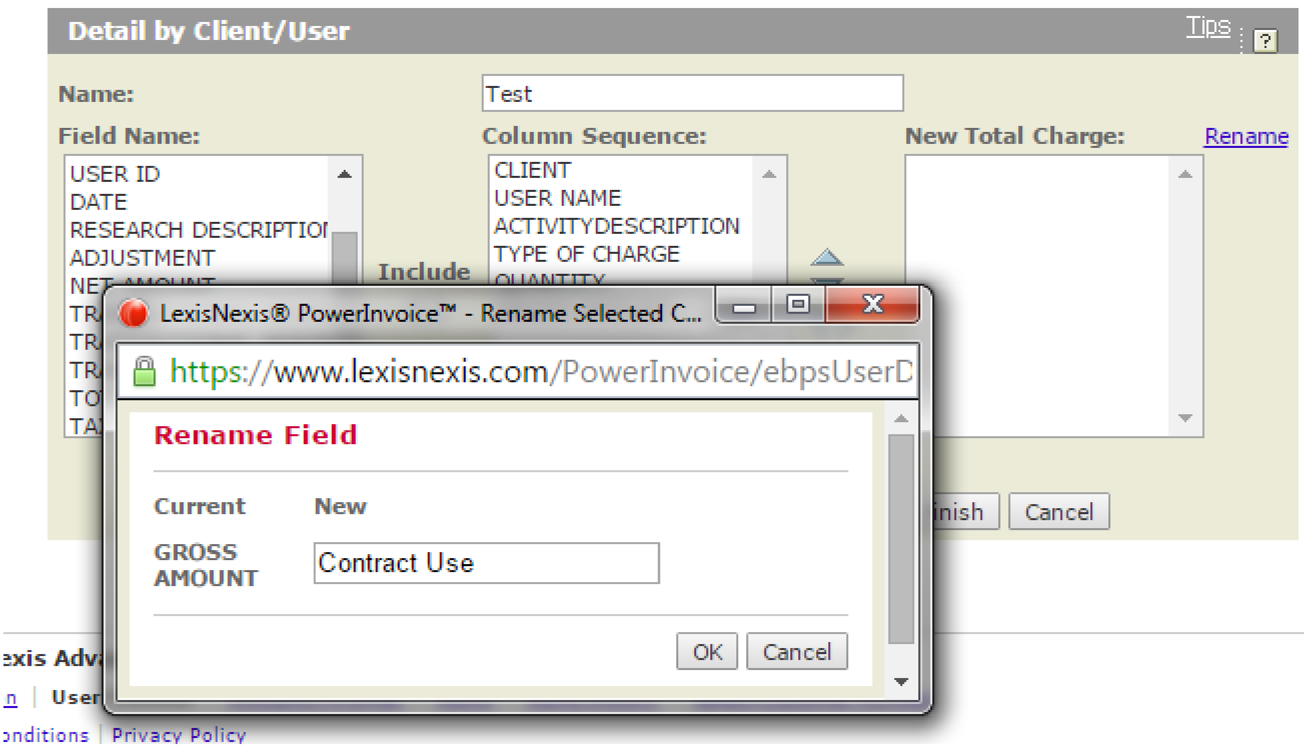
Select Base Report



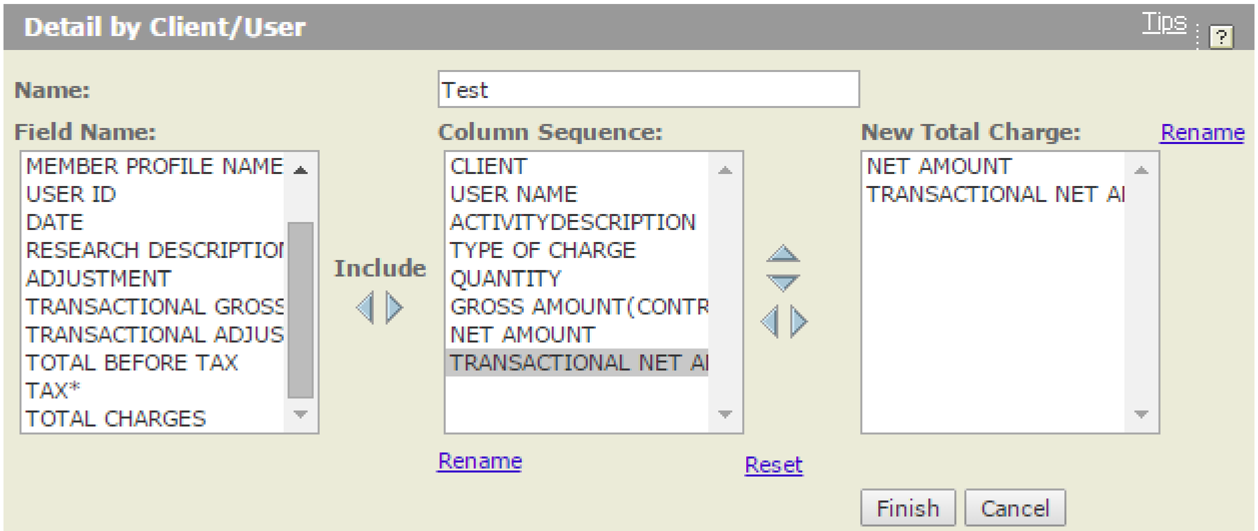
Detail by Client/User



Rename Field

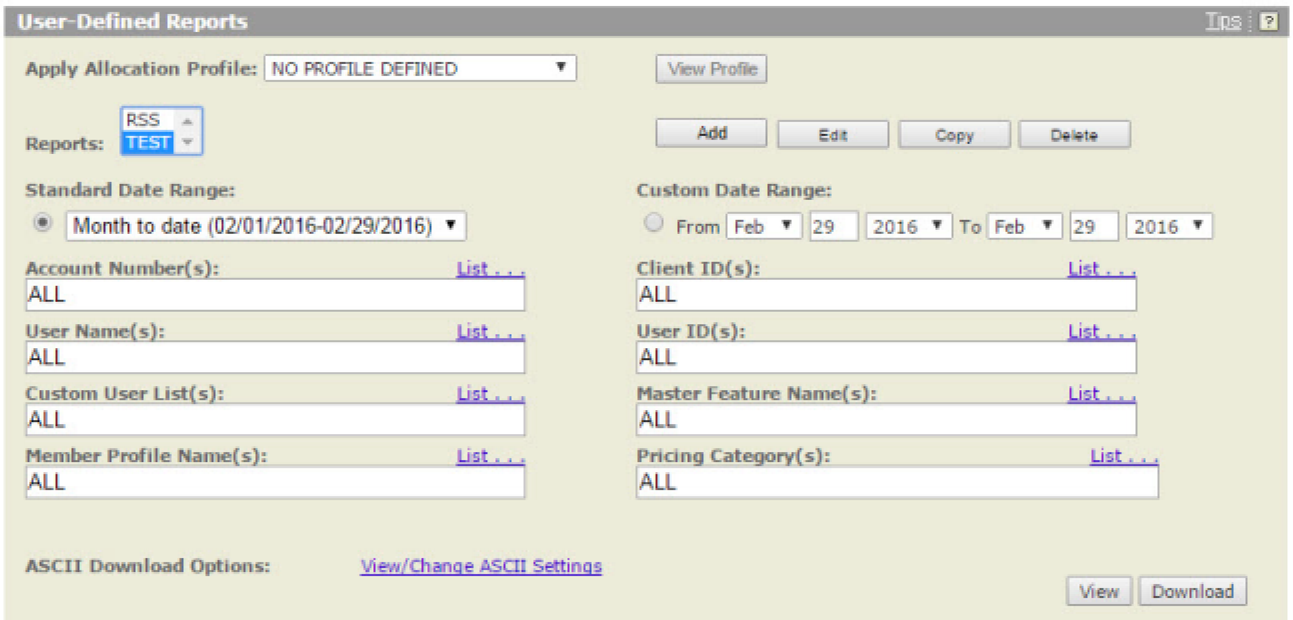


Detail by Client/User - Resequenced


Detail by Client/User
Tips
Name:
Test
Field Name:
MEMBER PROFILE NAME
USER ID
DATE
RESEARCH DESCRIPTIOI
ADJUSTMENT
TRANSACTIONAL GROSS
TRANSACTIONAL ADJUS
TOTAL BEFORE TAX
TAX*
TOTAL CHARGES
Include
Column Sequence:
CLIENT
USER NAME
ACTIVITYDESCRIPTION
TYPE OF CHARGE
QUANTITY
GROSS AMOUNT(CONTR
NET AMOUNT
TRANSACTIONAL NET AI
Rename
Reset
New Total Charge:
Rename
NET AMOUNT
TRANSACTIONAL NET AI
Finish
Cancel

How do I view or download information from user-defined reports?

1. Select the **User-Defined** tab to view your reports.
2. Highlight the report name that you wish to view.
3. Select a date range.
4. Click the **View/Change ASCII Settings** link to modify those settings.
5. Choose an option:
   - Click **View** to view the user-defined layout
   - Click Download to download directly to your PC



Cost Recovery

It is not uncommon for law firms to recover research expenses by passing those expenses on to the clients for whom the research was performed. To assist in this process, the PowerInvoice service lets you generate customized billing reports. Using these customized billing reports, you can reallocate your research costs across the span of the LexisNexis Activity Descriptions and use that information to help set the level of cost recovery from your clients.

Customization is done by creating one or more custom-settings profiles. Each profile contains a series of customization factors that can be applied to the data for individual LexisNexis Activity Descriptions as the report is generated. These adjustment factors let you:

- Specify a flat dollar amount to be recovered for each type of billed action performed using a particular LexisNexis Activity Description
- Specify a percentage rate to be recovered for each type of billed action performed using a particular LexisNexis Activity Description
- Rename any LexisNexis Activity Description to a name more descriptive to your clients
- Specify whether the recovery amounts or rates should be applied to Contract or Transactional, Gross or Net amounts

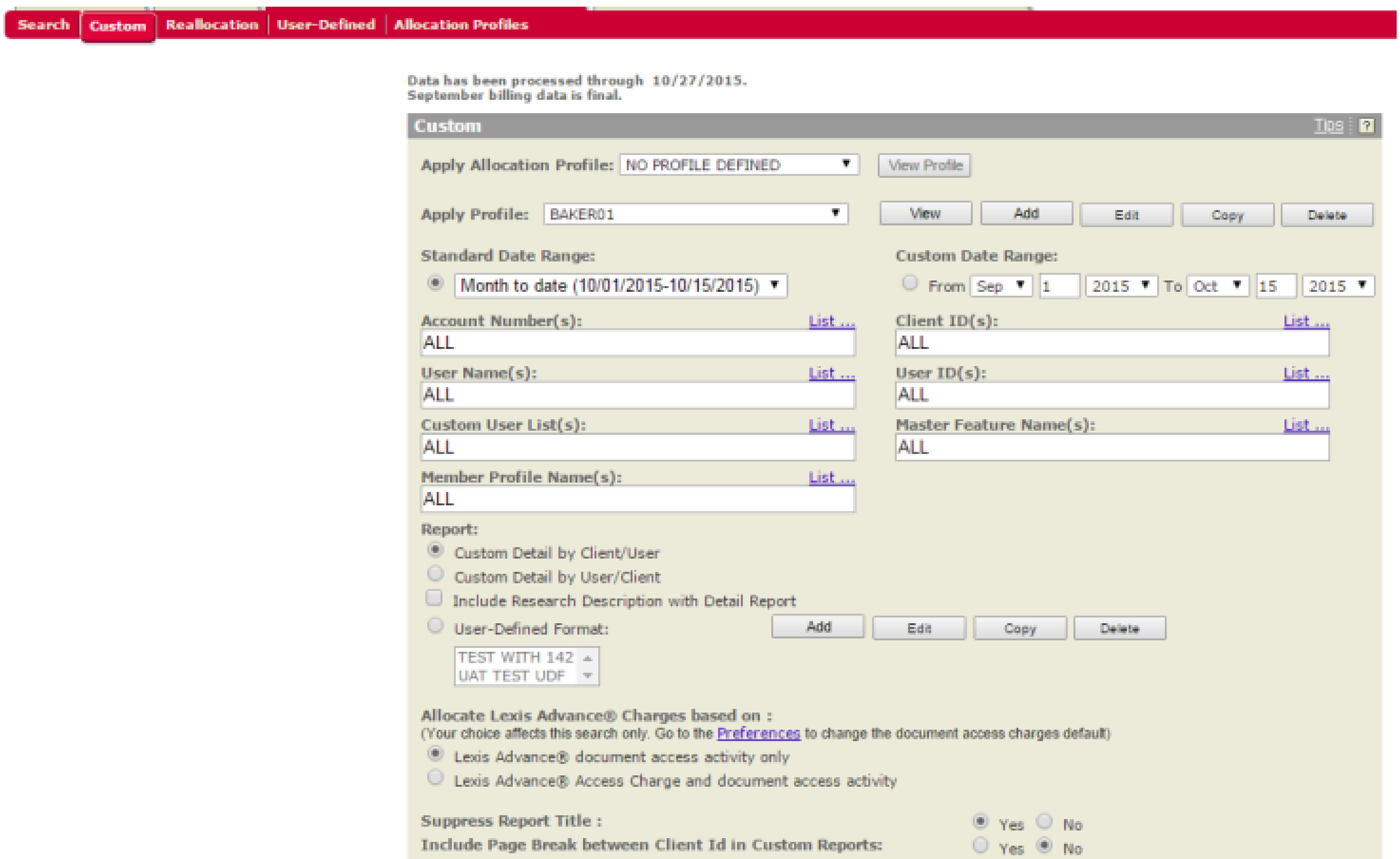
Once you have created, named and saved a custom-settings profile, you can use this feature to generate a custom report that applies the adjustment factors specified in the profile you select. Be aware that this feature does not alter any of the actual LexisNexis charges that are billed to your firm.

Cost-recovery options let you establish recovery rates - before sending billing data to your office billing system. Once you've selected the Custom tab under the Billing Data tab, you'll see the Custom screen.

How do I use the Billing Data > Custom page?

On this page, you can:

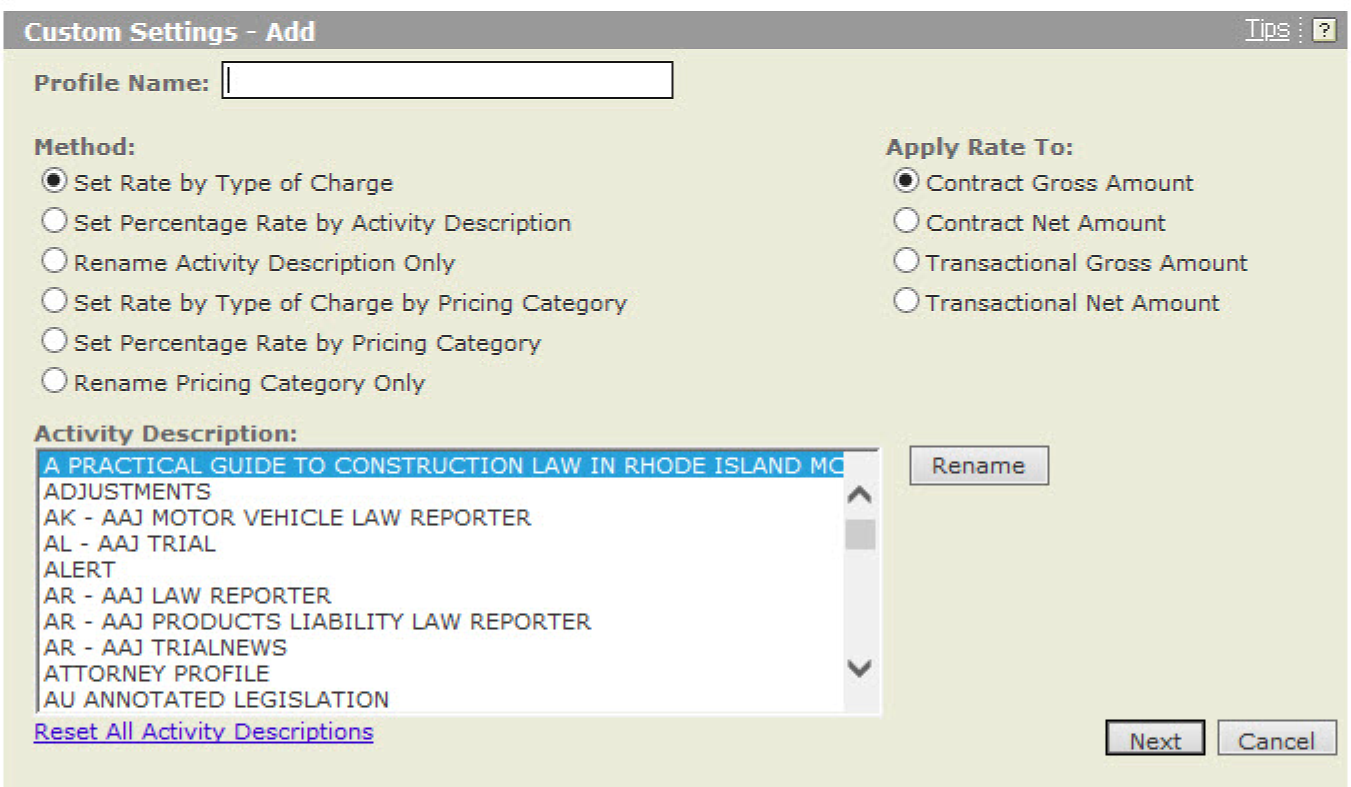
- Add a cost-recovery profile to apply to your billing data.
- Edit an existing profile.
- Make a copy of an existing profile if it's very close to a new profile you need to create.
- Delete an existing profile.
- Apply an existing profile to your billing data.
- Choose whether or not to Suppress Report Titles or Include Page Breaks in your reports.



How do I create a profile?

At any time, you can create a new profile (a set of cost-recovery options).

1. Enter a **Profile Name**.
2. Choose the method of recovery.
3. Choose a Method:
   - Set Rate by Type of Charge lets you assign a fixed amount you wish to recover for any LexisNexis activity description.
   - Set Percentage Rate by Activity Description lets you assign a proportional amount you wish to recover.
   - The Rename Activity DescriptionOnly option lets you rename without adjusting recovery rates. For example, you might prefer to have "Primary Legal Research" appear instead as "LexisNexis® Legal Services" on the invoices you send your clients.
   - Choose to apply fixed or percentage rates to the gross amount indicated in your contract, the net amount indicated in your contract, the gross amount charged to you per transaction or the net amount charged to you per transaction.
   - Select an Activity Description and click here to rename it. (You can rename an activity description regardless of whether you choose to set a recovery rate.)
   - Set Rate by Type of Charge by Pricing Category lets you assign an amount you want to recover for any pricing category
   - Set Percentage Rate by Pricing Category allows you to specify the percentage rate for any pricing category
   - Click the **Reset All Activity Descriptions** if you'd like to remove the modifications you've made.
   - Click **Next** to continue.

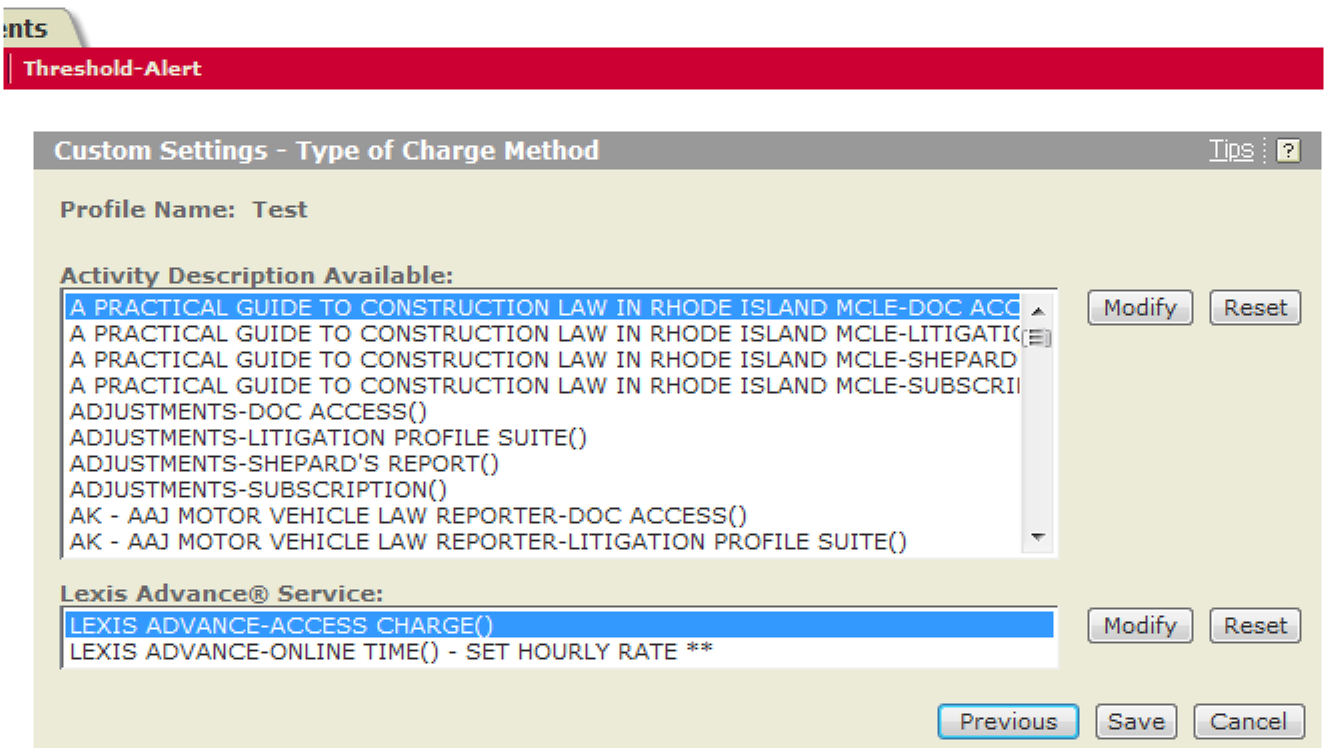


How do I set fixed rates?

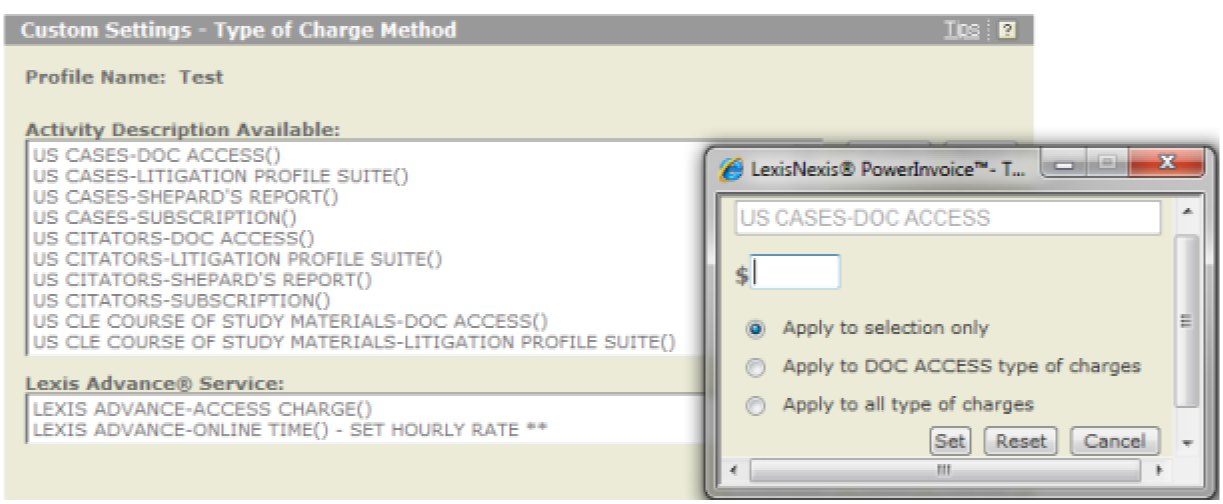
If you've selected the **Set Rate by Type of Charge** Method, you can:

1. Select any Activity Description to set a fixed rate for cost recovery.
2. Highlight any activity description and click **Reset** in order to modify a previously set rate or to reset the rate.
3. Once you have set all desired recovery rates, click **Save** to save your new profile.

Custom Settings - Type of Charge Method



Fixed Rate Pop-up Window



Once you've selected an activity description:

1. Enter the fixed amount you wish to recover for each occurrence of that activity description.

2. Once you've set an amount, click **Set**.

3. Click **Reset** to reset the dollar amount field.

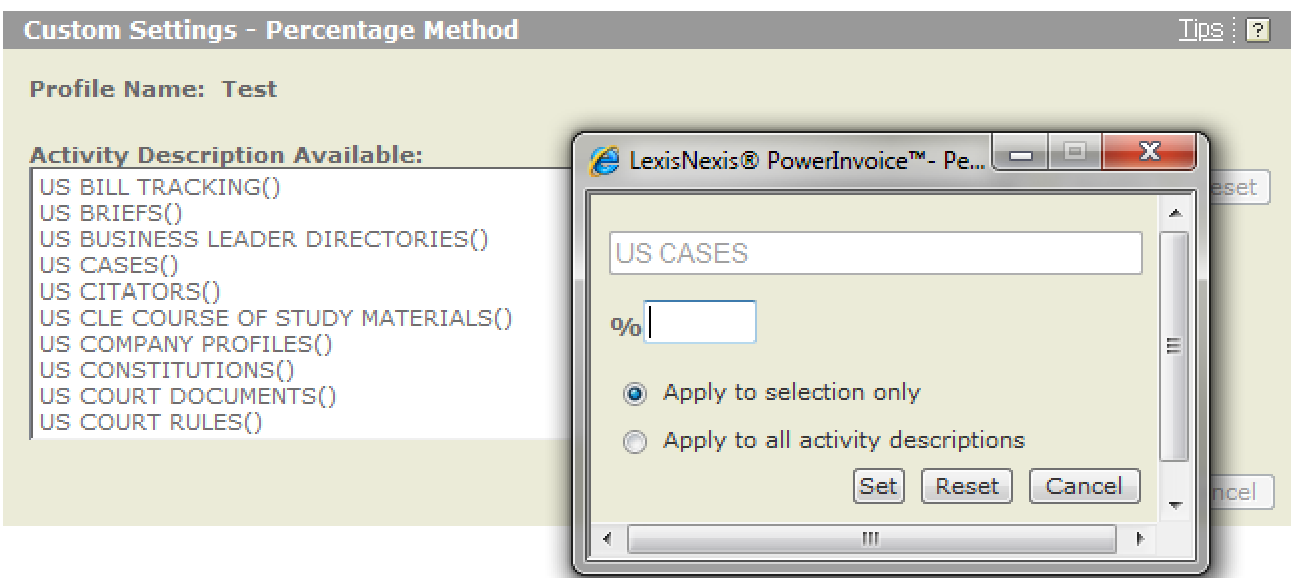
How do I set percentage rates?

If you've selected Set Percentage Rate by Activity Description, you can:

1. Select any activity description to set a proportional rate for cost recovery.[1]
2. Click **Reset** to remove any previously entered dollar amount.
3. Once you have set all desired recovery rates, click **Save** to save your new profile.

Here's what you'll see:

Percentage Pop-up Window



Once you've selected an activity description:

1. Enter the percentage rate you wish to recover for each occurrence of that activity description.
2. Once you've set a percentage rate, click **Set**.

3. Click **Reset** to reset the percentage rate form.

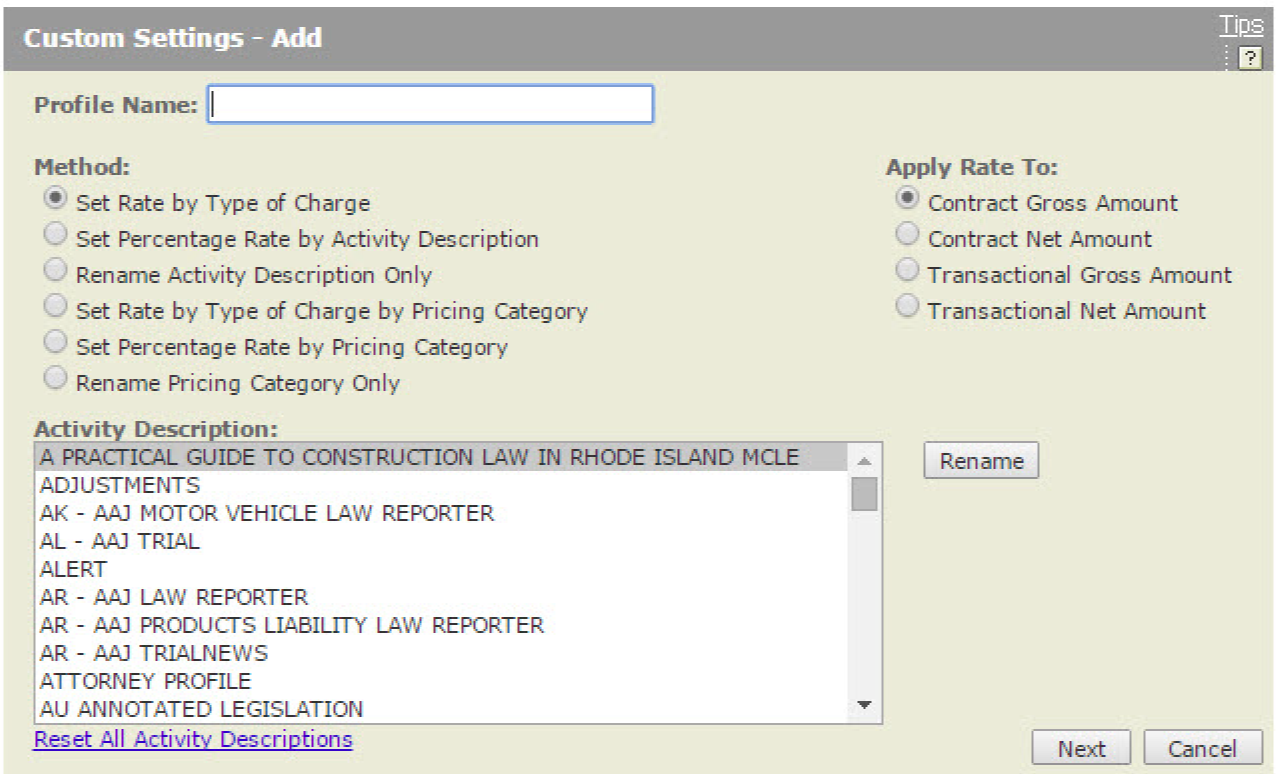
Tip:
The rate you enter indicates the percentage rate you wish to recover, not the discount rate. If you enter 25, you'll recover 25 cents on the dollar; if you enter 125, you'll recover 125 cents on the dollar.

How do I rename activity descriptions?

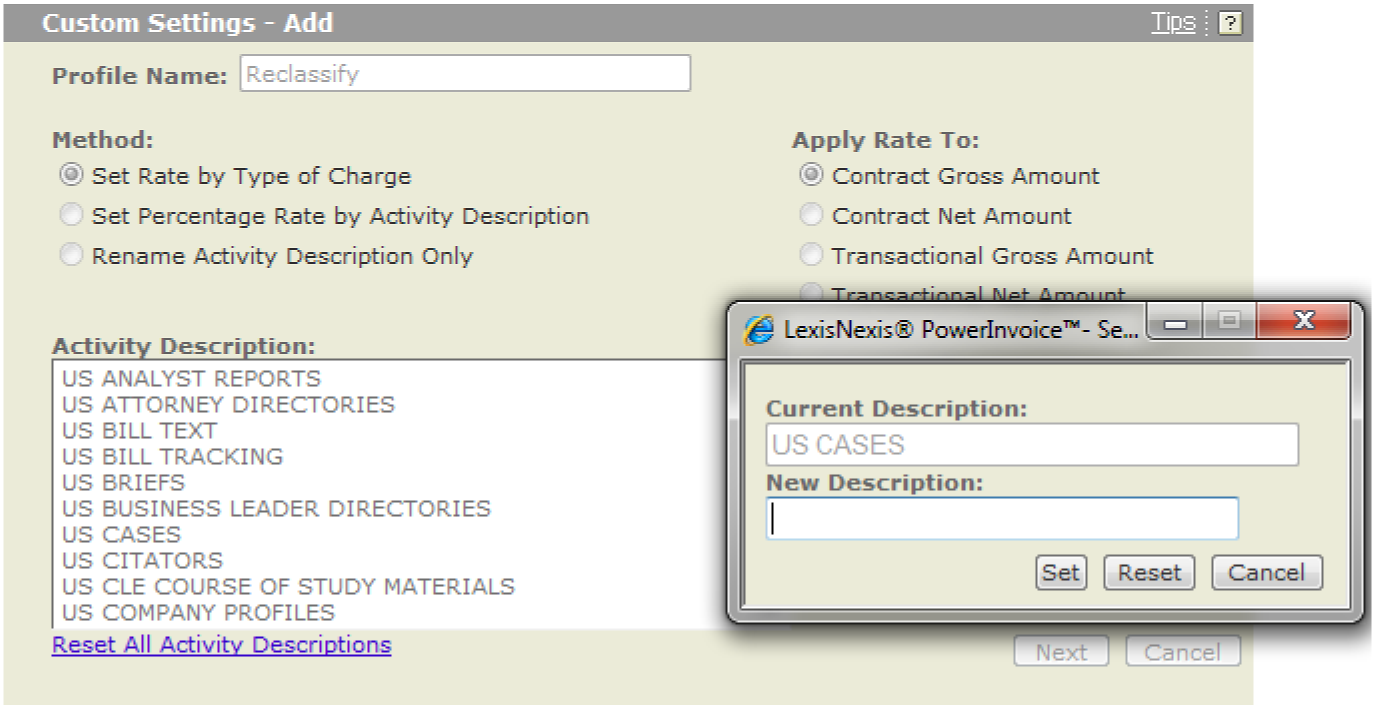
Whether you're setting recovery rates or not, whether you're creating, editing or copying a profile, you can rename any or all Activity Descriptions that appear in your billing system. For example, you might prefer to have "Primary Legal Research" appear instead as "LexisNexis US Codes".

1. Select a activity description to rename and click **Rename**.
2. Once you have renamed all desired activity descriptions, click **Save** to save them.

Custom Settings - Rename



Rename Pop-up Window

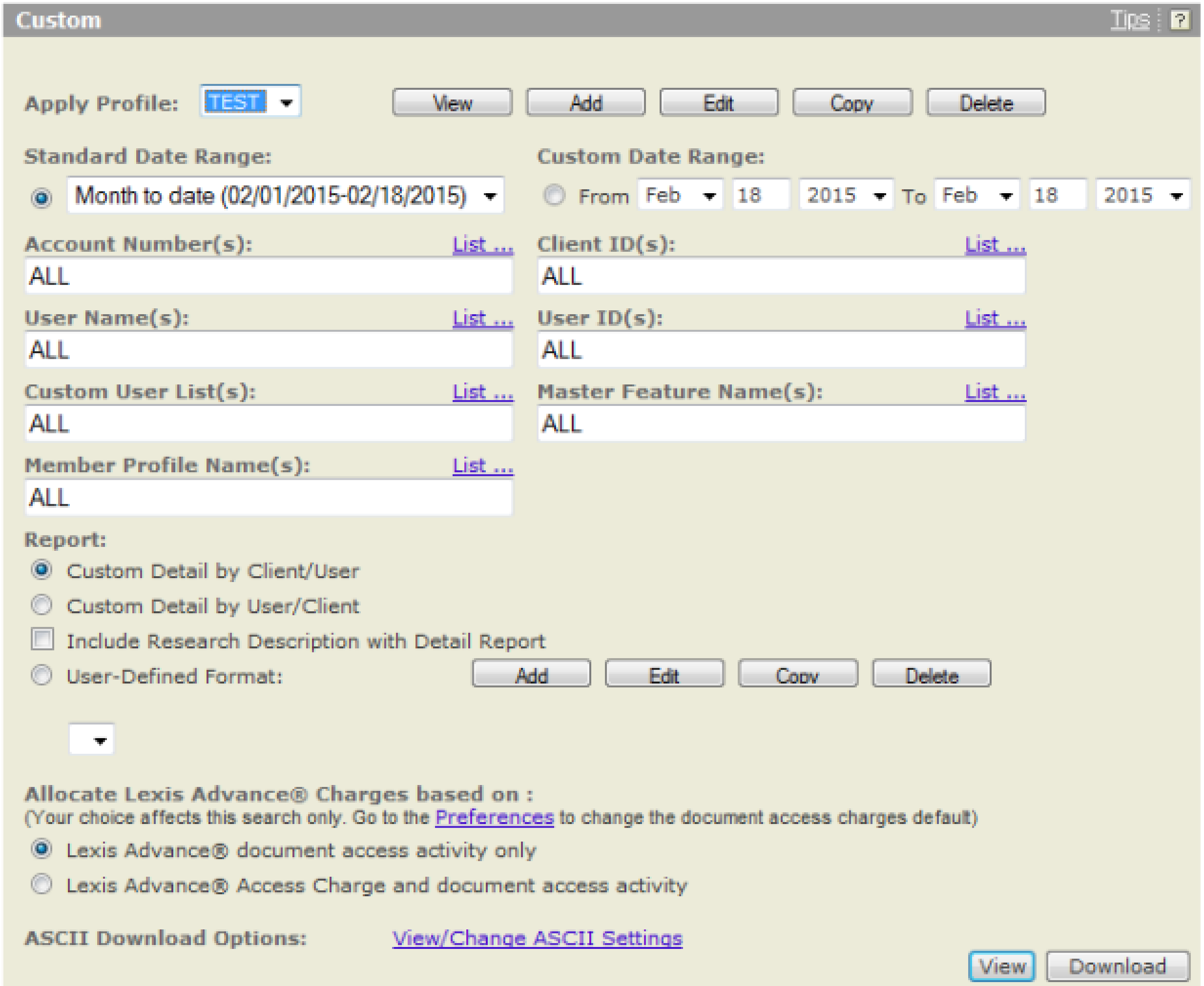


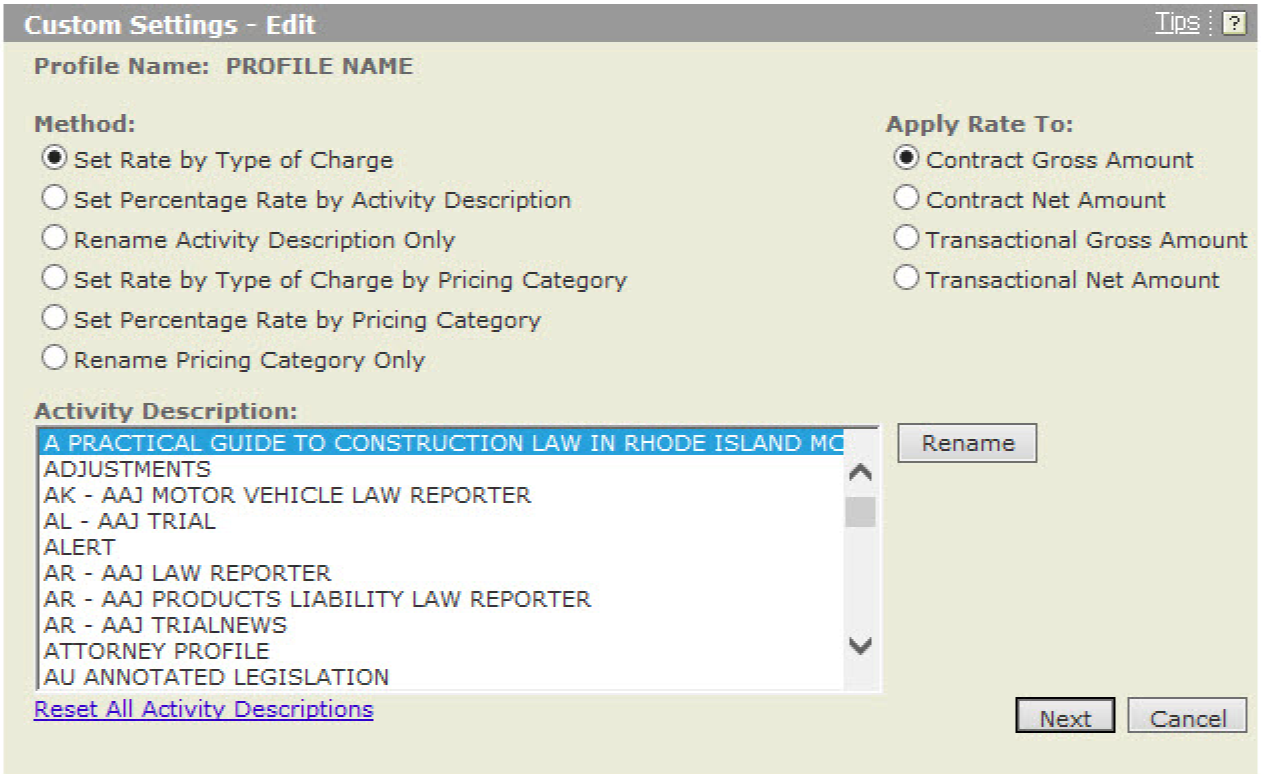
Once you've selected an activity description:

1. Enter a **New Description**.
2. Click **Set** to save.

How do I edit a profile?

1. Select an existing profile.
2. Click **Edit**.
3. Enter a **Profile Name**.
4. Choose the method of recovery.
5. Choose a Method:
   - Set Rate by Type of Charge lets you assign a fixed amount you wish to recover for any LexisNexis activity description.
   - Set Percentage Rate by Activity Description lets you assign a proportional amount you wish to recover.
   - The Rename Activity DescriptionOnly option lets you rename without adjusting recovery rates. For example, you might prefer to have "Primary Legal Research" appear instead as "LexisNexis® Legal Services" on the invoices you send your clients.
   - Choose to apply fixed or percentage rates to the gross amount indicated in your contract, the net amount indicated in your contract, the gross amount charged to you per transaction or the net amount charged to you per transaction.
   - Select an Activity Description and click here to rename it. (You can rename an activity description regardless of whether you choose to set a recovery rate.)
   - Click the **Reset All Activity Descriptions** if you'd like to remove the modifications you've made.
   - Click **Next** to continue.

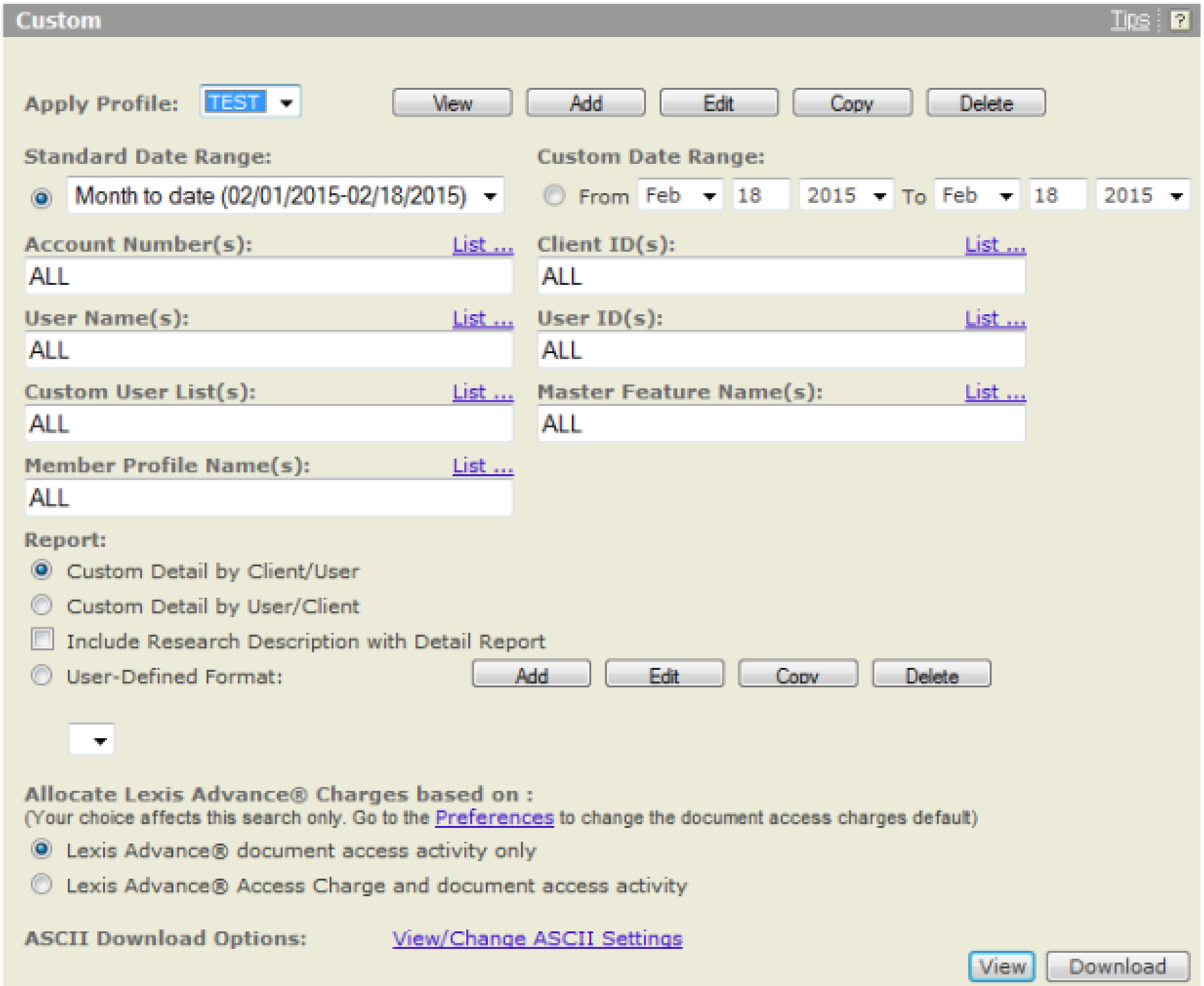

Custom
Tips
Apply Profile:
TEST
View
Add
Edit
Copy
Delete
Standard Date Range:
Month to date (02/01/2015-02/18/2015)
Custom Date Range:
From
Feb
18
2015
To
Feb
18
2015
Account Number(s):
List ...
ALL
Client ID(s):
List ...
ALL
User Name(s):
List ...
ALL
User ID(s):
List ...
ALL
Custom User List(s):
List ...
ALL
Master Feature Name(s):
List ...
ALL
Member Profile Name(s):
List ...
ALL
Report:
Custom Detail by Client/User
Custom Detail by User/Client
Include Research Description with Detail Report
User-Defined Format:
Add
Edit
Copy
Delete
Allocate Lexis Advance® Charges based on :
(Your choice affects this search only. Go to the Preferences to change the document access charges default)
Lexis Advance® document access activity only
Lexis Advance® Access Charge and document access activity
ASCII Download Options:
View/Change ASCII Settings
View
Download

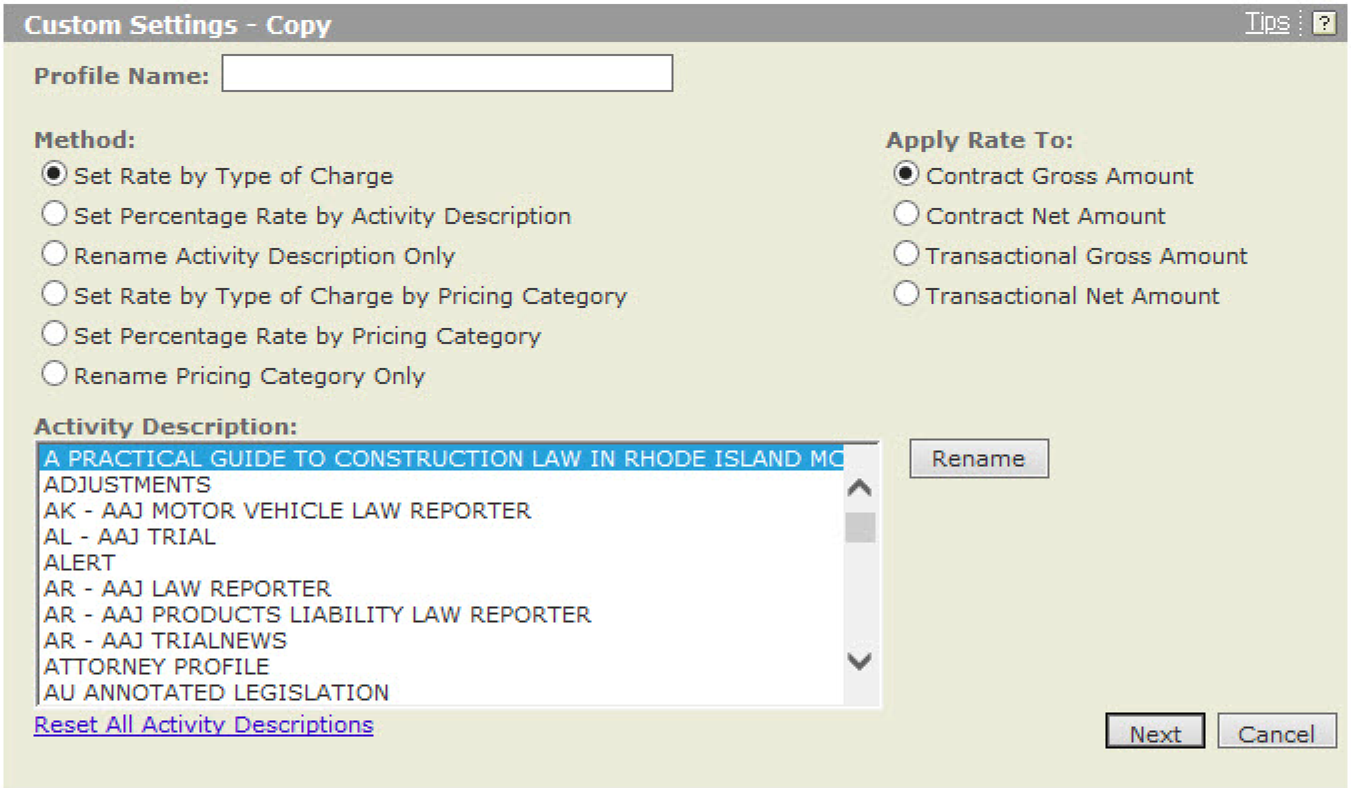

Custom Settings - Edit
Tips
Profile Name: PROFILE NAME
Method:
Set Rate by Type of Charge
Set Percentage Rate by Activity Description
Rename Activity Description Only
Set Rate by Type of Charge by Pricing Category
Set Percentage Rate by Pricing Category
Rename Pricing Category Only
Apply Rate To:
Contract Gross Amount
Contract Net Amount
Transactional Gross Amount
Transactional Net Amount
Activity Description:
A PRACTICAL GUIDE TO CONSTRUCTION LAW IN RHODE ISLAND MO
ADJUSTMENTS
AK - AAJ MOTOR VEHICLE LAW REPORTER
AL - AAJ TRIAL
ALERT
AR - AAJ LAW REPORTER
AR - AAJ PRODUCTS LIABILITY LAW REPORTER
AR - AAJ TRIALNEWS
ATTORNEY PROFILE
AU ANNOTATED LEGISLATION
Rename
Reset All Activity Descriptions
Next
Cancel

How do I copy a profile?

You can make a copy of an existing profile that's close to what you need and then modify it.

1. Select an existing profile.
2. Click **Copy**.
3. Enter a **Profile Name**.
4. Choose the method of recovery.
5. Choose a Method:
   - Set Rate by Type of Charge lets you assign a fixed amount you wish to recover for any LexisNexis activity description.
   - Set Percentage Rate by Activity Description lets you assign a proportional amount you wish to recover.
   - The Rename Activity DescriptionOnly option lets you rename without adjusting recovery rates. For example, you might prefer to have "Primary Legal Research" appear instead as "LexisNexis® Legal Services" on the invoices you send your clients.
   - Choose to apply fixed or percentage rates to the gross amount indicated in your contract, the net amount indicated in your contract, the gross amount charged to you per transaction or the net amount charged to you per transaction.
   - Select an Activity Description and click here to rename it. (You can rename an activity description regardless of whether you choose to set a recovery rate.)
   - Click the **Reset All Activity Descriptions** if you'd like to remove the modifications you've made.
   - Click **Next** to continue.

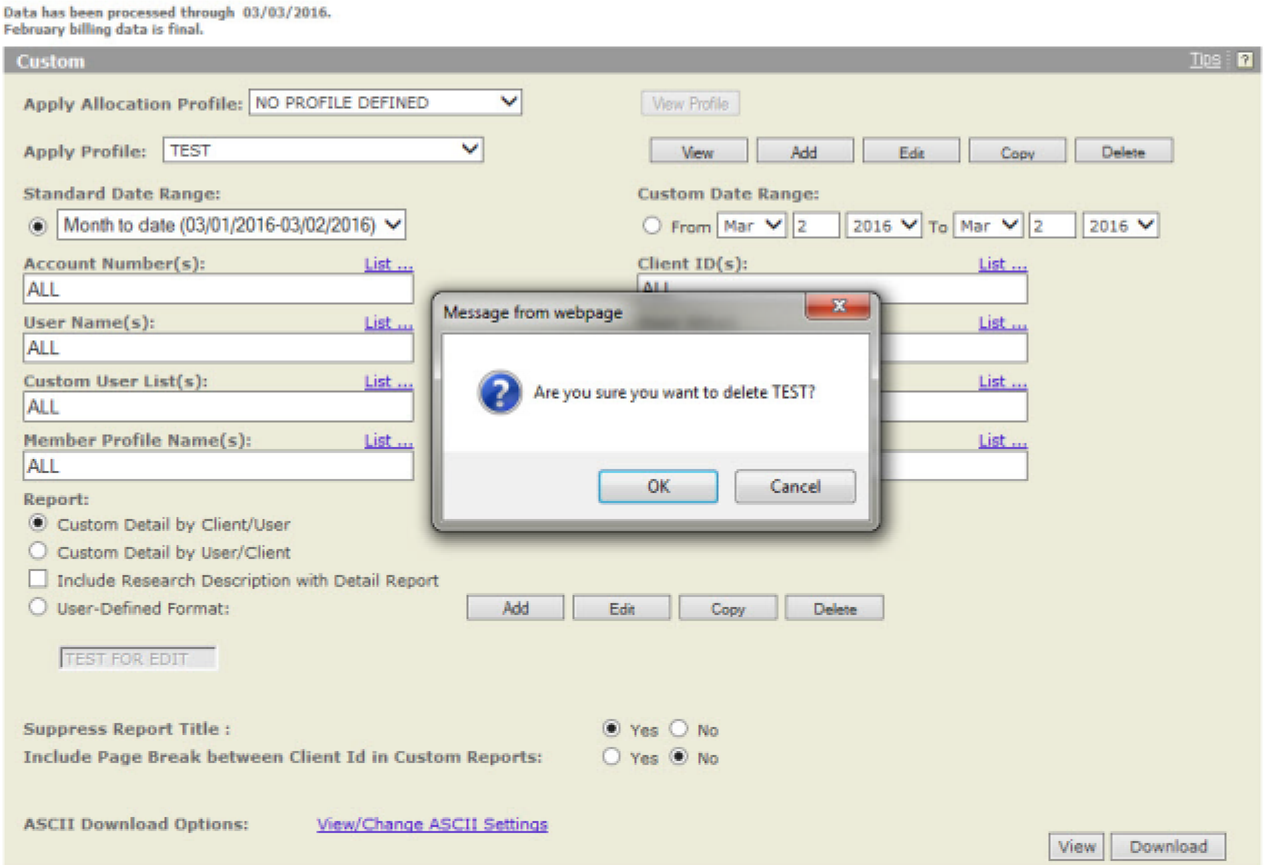

Custom
Tips
Apply Profile: TEST
View Add Edit Copy Delete
Standard Date Range:
Month to date (02/01/2015-02/18/2015)
Custom Date Range:
From Feb 18 2015 To Feb 18 2015
Account Number(s): List ...
ALL
Client ID(s): List ...
ALL
User Name(s): List ...
ALL
User ID(s): List ...
ALL
Custom User List(s): List ...
ALL
Master Feature Name(s): List ...
ALL
Member Profile Name(s): List ...
ALL
Report:
Custom Detail by Client/User
Custom Detail by User/Client
Include Research Description with Detail Report
User-Defined Format:
Add Edit Copy Delete
Allocate Lexis Advance® Charges based on :
(Your choice affects this search only. Go to the Preferences to change the document access charges default)
Lexis Advance® document access activity only
Lexis Advance® Access Charge and document access activity
ASCII Download Options:
View/Change ASCII Settings
View Download


Custom Settings - Copy
Tips
?
Profile Name:
Method:
Set Rate by Type of Charge
Set Percentage Rate by Activity Description
Rename Activity Description Only
Set Rate by Type of Charge by Pricing Category
Set Percentage Rate by Pricing Category
Rename Pricing Category Only
Apply Rate To:
Contract Gross Amount
Contract Net Amount
Transactional Gross Amount
Transactional Net Amount
Activity Description:
A PRACTICAL GUIDE TO CONSTRUCTION LAW IN RHODE ISLAND MO
ADJUSTMENTS
AK - AAJ MOTOR VEHICLE LAW REPORTER
AL - AAJ TRIAL
ALERT
AR - AAJ LAW REPORTER
AR - AAJ PRODUCTS LIABILITY LAW REPORTER
AR - AAJ TRIALNEWS
ATTORNEY PROFILE
AU ANNOTATED LEGISLATION
Rename
Reset All Activity Descriptions
Next
Cancel

How do I delete a profile?

If you decide that you no longer need one of your profiles, you can:

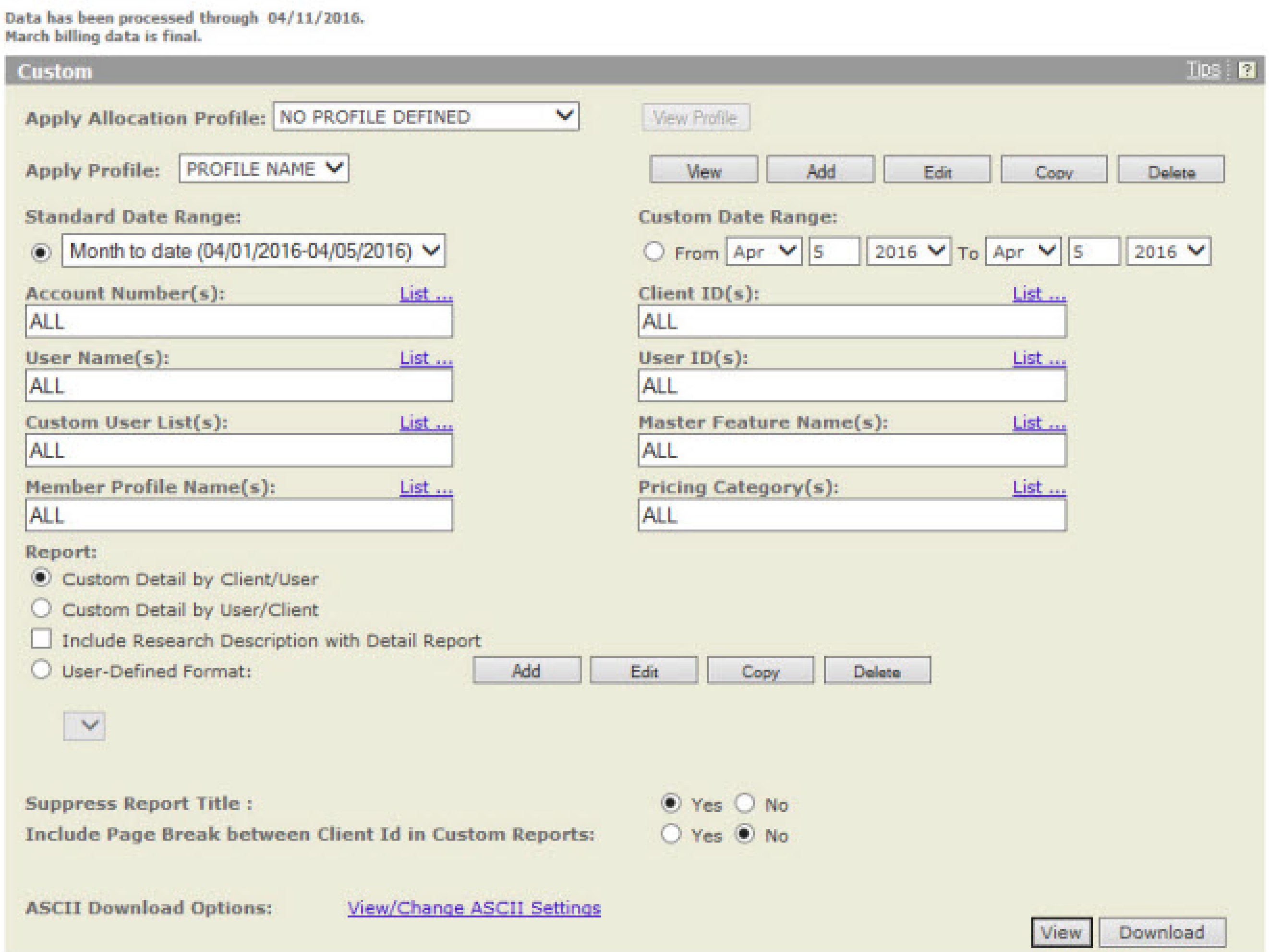
1. Select an existing profile.
2. Click **Delete**.



How do I apply a profile to billing data?

Once you've created one or more custom profiles you can apply one to your billing data.

1. From the list of existing profiles, select the one you want to apply.
2. Choose the date range of the billing data you wish to retrieve - either one of the standard date ranges on the list or a custom date range.
3. (Optional) If desired, choose one or more account numbers, client IDs, user names, and/or user IDs.
4. Select the report to run.
5. Click the **View/Change ASCII Settings** link to modify those settings.
6. Once you've made all your selections, click **View** to view your billing data with your selected profile applied.
7. Once you've made your selections, click **Download** to download your billing data with your selected profile applied.



1 You may not set percentage rates for recovery of costs for citator services.

PowerInvoice™ Reallocation

The Reallocation feature in PowerInvoice allows you to identify, reallocate or remove completely non-billable research charges.

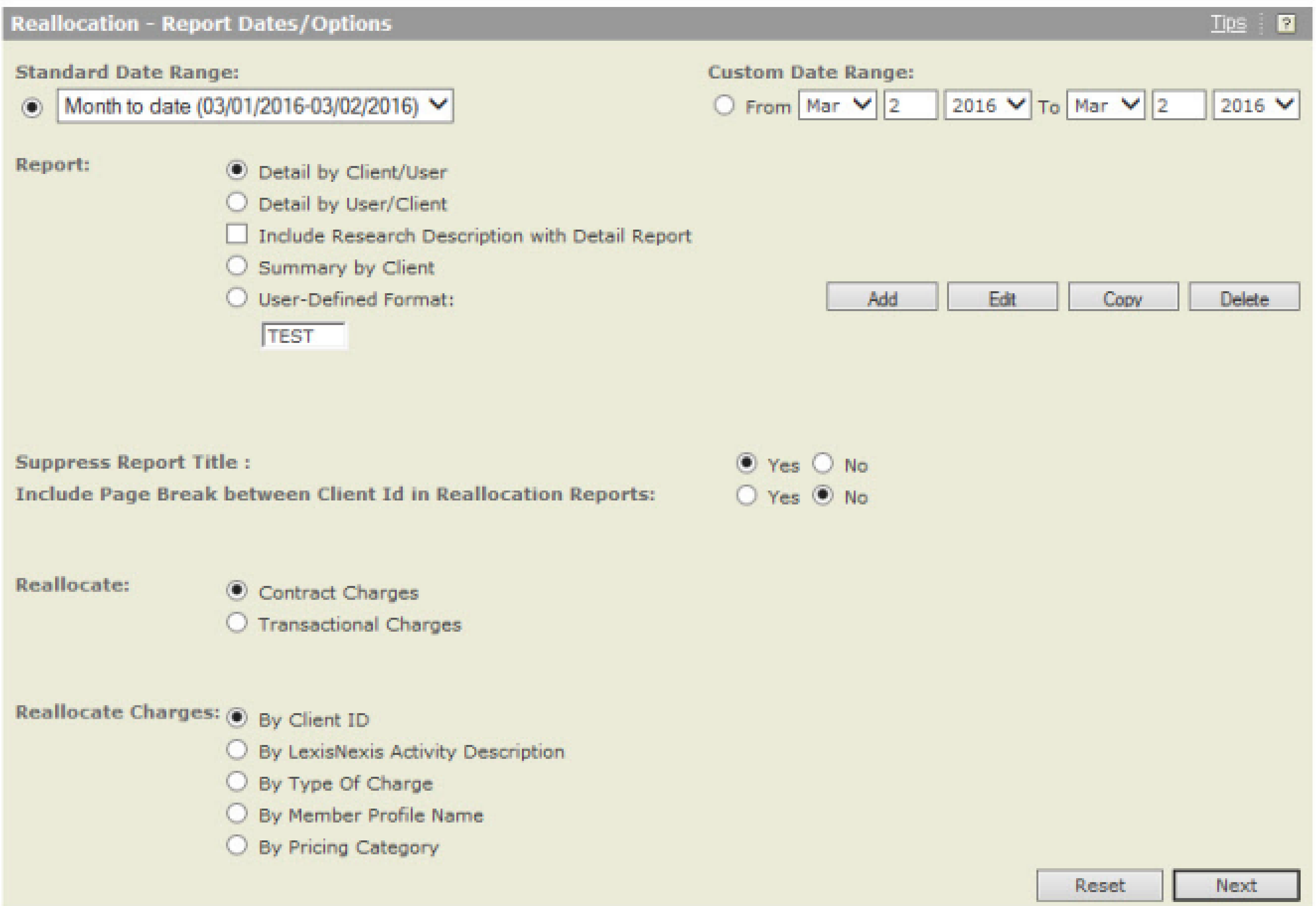
The PowerInvoice reports used for reallocation are the **Detail Client by User**, **Detail User by Client** and **Summary by Client** reports. At the **Reallocation – Report Dates/Options** screen, you can perform the tasks listed on the following pages.

How do I use the reallocation feature?

The Reallocation feature in PowerInvoice allows you to identify, reallocate or remove completely non-billable research charges.

The PowerInvoice reports used for reallocation are the Detail Client by User, Detail User by Client, and Summary by Client reports. At the “Reallocation – Report Dates/Options” screen, you can select from the following options:

1. Choose one of the standard date range options or create your own custom date range.
2. Determine how you want the detail report sorted by choosing either the Client/User or User/Client order.
3. Choose whether to **Suppress Report Title** or **Include Page Breaks**.
4. Choose to reallocate contract charges or transactional charges.
5. Choose to reallocate charges By Client ID, By LexisNexis Activity Description, By Type of Charge, or By Member Profile Name.
6. Click **Next** to continue the reallocation process.



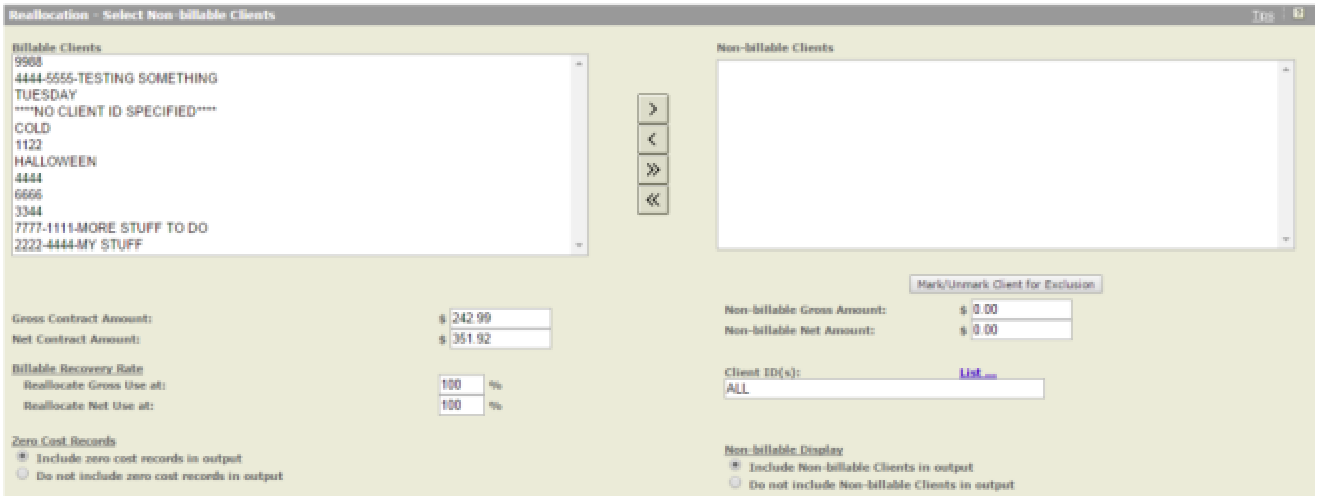
Reallocating Contract or Transactional Charges

You have the choice of reallocating contract charges, which will help you recover the cost of your flat-rate contract or use-discount plan by dispersing non-billable charges among the billable clients on the PowerInvoice report. You also have the option of reallocating transactional charges from non-billable to billable clients.

However, contract charges can only be reallocated to other contract charges and transactional charges can only be reallocated to other transactional charges. You cannot reallocate transactional charges to contract charges and vice versa.

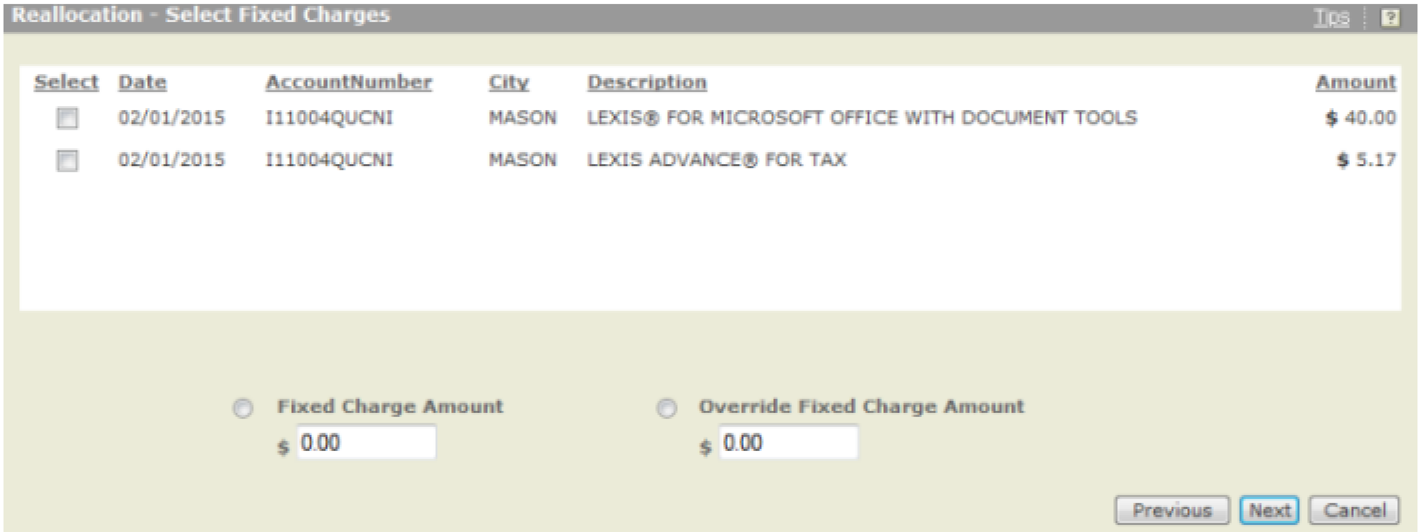
Reallocating by Client ID, LexisNexis® Activity Description, Type of Charge, Member Profile or Pricing Category

You can also choose whether to reallocate non-billable LexisNexis Activity Description charges or non-billable client charges. For example, you may choose to reallocate all US Cases charges to the other activity description charges on your PowerInvoice report, such as US Codes or US Administrative Materials. The other option would be to reallocate non-billable client charges to billable clients. It is not possible to generate one report that will reallocate charges for both non-billable LexisNexis Activity Descriptions and clients.



Reallocating Fixed Charges

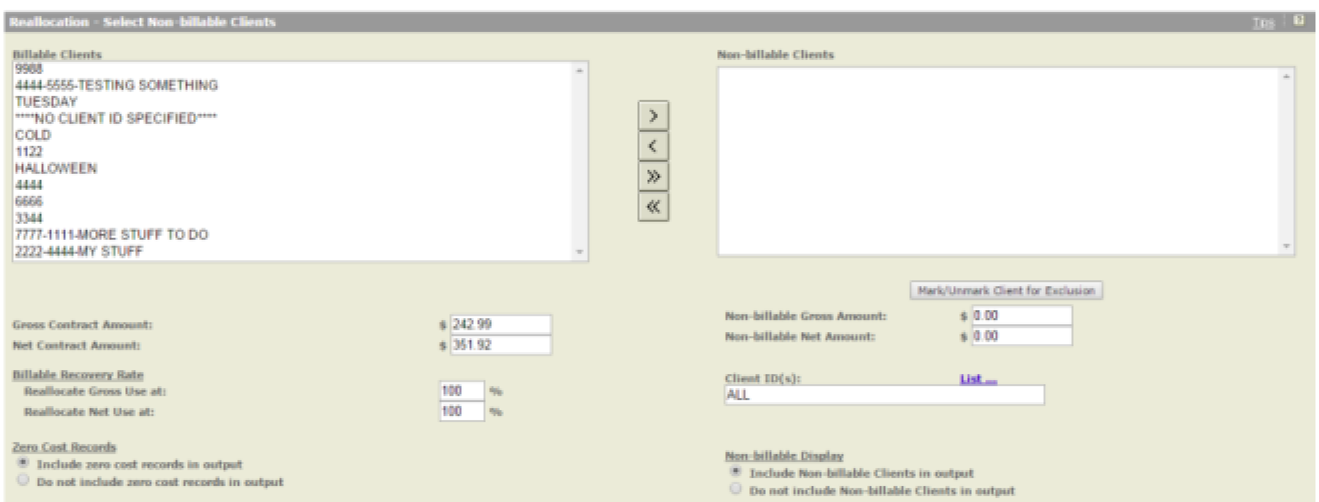
The next step in the reallocation process is to select which fixed charges (if any) you would like to reallocate. Fixed charges are not applicable to everyone and the following screen will only appear if you do have monthly fixed charges:



If you wish to reallocate these fixed charges, select the charge to the left of the item. As you select these items, the box at the bottom of the screen will display the total of the fixed charges you want to reallocate.

If you select the radio button for Fixed Charge Amount, the amount shown in this box will be reallocated. If you select the radio button for Override Fixed Charge Amount, you can enter in the amount you want to reallocate instead.

Once the fixed charges (if any) have been selected, the screen at right will appear with a list of the Client IDs entered for the selected date range.



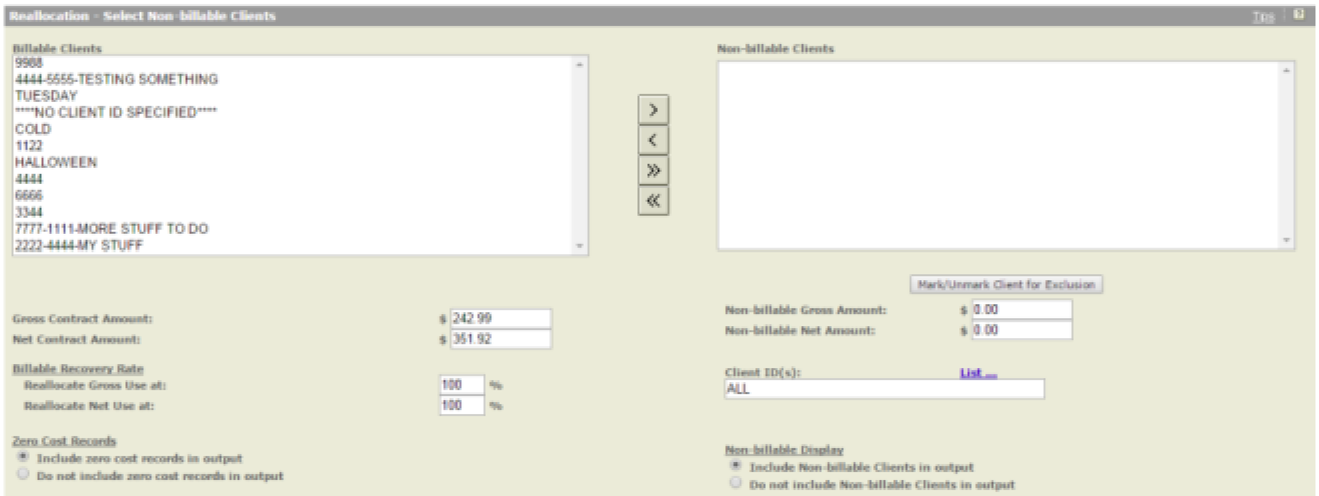
All Client IDs or activity descriptions will appear in the box on the left—Billable Clients. You can move Client IDs to the box on the right—Non-billable Clients— by highlighting non-billable Client IDs and using the arrow buttons in the middle. As you move Client IDs to the box on the right, the spaces underneath for Non-billable gross and net amounts will reflect the charges associated with these clients. The middle column of boxes will display the customer's total gross and net contract or transactional amount for the selected time period.

The billable recovery rate input field allows you the option to specify the percentage rate at which the gross and net usages will be reallocated. In other words, the percentage rates you select will be applied to the figures displayed in the Non-Billable Gross/Net Amount fields on the far right side of the screen. For example, if you enter 50% in the "Reallocate Gross Use at" field, one half of the total unexcluded non-billable charges displayed in the Non-Billable Gross Amount field will be distributed among your billable clients when the Reallocation report is generated.

Zero-cost Records

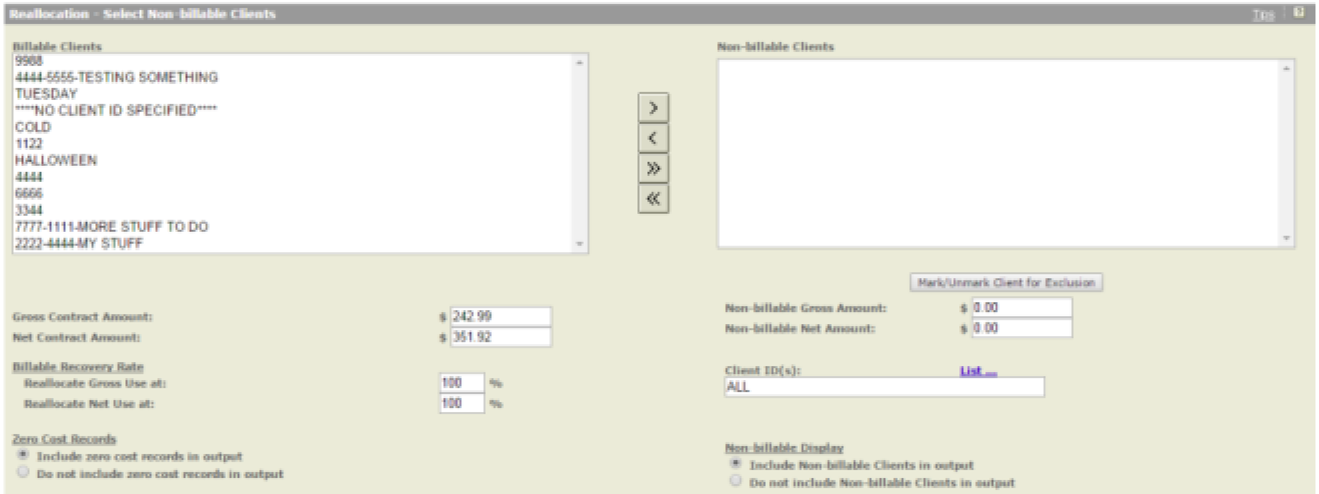
You can eliminate any zero-cost records included in the Reallocation report. If you choose this option, any billing record with a total amount equal to $0 will be removed.

Tip:
Choosing not to include zero-cost records may streamline the report and make it easier to read.



Non-billable Display

You can also determine whether you want the non-billable client/service information to appear in the Reallocation report.



Marking or Unmarking Items for Exclusion

This button is located beneath the list of non-billable clients/services and is used to identify and isolate those items you do not wish to reallocate. Simply click the item in the list above and then click the **Mark/Unmark** button to mark it for exclusion. Any charges associated with the item will be removed from the total non-billable charges and will not be reallocated. The item will remain in the non-billable list, and >>>EXCLUDE<<< will be appended to the item's name. If you wish to reallocate these fixed charges, select the charge by placing a check mark in the box to the left of the item. As you select these items, the box at the bottom of the screen will display the total of the fixed charges you want to reallocate.

Selecting the item and clicking the **Mark/Unmark** button again will remove the >>>EXCLUDE<<< sign next to the item and add it back in to the Reallocation report's calculations. Once these selections have been made, you may either view the report online or download the report. You can also select to download the report after you have viewed it online. The report can be downloaded in HTML, ASCII, or spreadsheet format. If you choose ASCII, you can select from the following ASCII settings:

- Fixed Length—Each column is defined by a set length and width.
- Delimited—Instead of a fixed length format, the fields are separated by a character such as a tab or comma.

If you choose delimited, then you must choose from the following:

- Delimiter Type—a column separator (delimiter) is used to denote breaks between fields of data. Comma and tab are common column delimiters, but the Other field is where you can input any other column delimiter. For example: pipe symbol (|) exclamation mark (!) question mark (?) period (.) etc.
- Quote—By quoting the Text Fields, applications like Excel® will not attempt to convert the data within the quotes. In some cases, without quotes, data is read and converted by Excel into a formula. By quoting the text, the data is left as is and displays correctly.
- Quote Type—This is user- or time- and billing-application preference as to the type of quote used, double or single quotes.
- Include Column Headers—You can also choose to include/not include the column headings when downloading the report.

Reallocation Report

The Reallocation report is identical to the Detail by Client/User (or User/Client) Date/Service/Type of Charge report with two additional columns on the right.

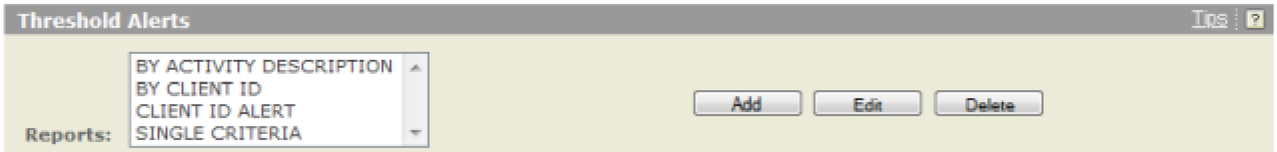
One column shows the reallocated gross amounts and the other shows the reallocated net amounts. The column heading will either say "Reallocated Contract Gross/Net Amount" or "Reallocated Transactional Gross/Net Amount" depending on what type of charges you select to be reallocated. An example of the report appears below.

REALLOCATION DETAIL BY CLIENT/USER/DATE/ACTIVITY DESCRIPTION/TYPE OF CHARGE

					CONTRACT USE			TRANSACTIONAL USE								
USER ID	DATE	ACTIVITY DESCRIPTION	TYPE OF CHARGE	QUANTITY	GROSS AMOUNT	ADJUSTMENT	NET AMOUNT	TRANSACTIONAL GROSS AMOUNT	TRANSACTIONAL ADJUSTMENT	TRANSACTIONAL NET AMOUNT	TOTAL BEFORE TAX	TAX*	TOTAL CHARGES	REALLOCATED CONTRACT GROSS AMOUNT	REALLOCATED CONTRACT NET AMOUNT
BLANK	FEB-01-2015	TRANSACTIONAL COMMITMENT	TRANSACTIONAL COMMITMENT ADJ	1	$0.00	$0.00	$0.00	$0.00	$312.90	$312.90	$312.90	$0.00	$312.90	$0.00	$0.00
					$0.00	**$0.00**	**$0.00**	**$0.00**	**$312.90**	**$312.90**	**$312.90**	**$0.00**	**$312.90**	**$0.00**	**$0.00**
OVERCOMM.EU1	FEB-11-2015	SHEPARD'S	SHEPARD'S REPORT	2	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
	FEB-13-2015	US CASES	DOC ACCESS	2	$38.00	$11.76	$49.76	$0.00	$0.00	$0.00	$49.76	$3.60	$53.36	$0.00	$0.00
	FEB-16-2015	SHEPARD'S	SHEPARD'S REPORT	2	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
		US CASES	DOC ACCESS	2	$0.00	$0.00	$0.00	$38.00	$0.00	$38.00	$38.00	$2.76	$40.76	$0.00	$0.00
					$38.00	**$11.76**	**$49.76**	**$38.00**	**$0.00**	**$38.00**	**$87.76**	**$6.36**	**$94.12**	**$0.00**	**$0.00**
OVERCOMM.EU1	FEB-11-2015	US CASES	DOC ACCESS	2	$0.00	$0.00	$0.00	$38.00	($11.40)	$26.60	$26.60	$1.93	$28.53	$0.00	$0.00
	FEB-														

Threshold Alerts

You can Add, View, Edit, Copy, or Delete a threshold alert, using the buttons provided on the **Threshold Alerts** tab under the **Billing Data** tab.



What are Threshold Alerts?

Threshold Alerts allow you to set up an alert to notify you when certain thresholds have been reached.

Thresholds available include:

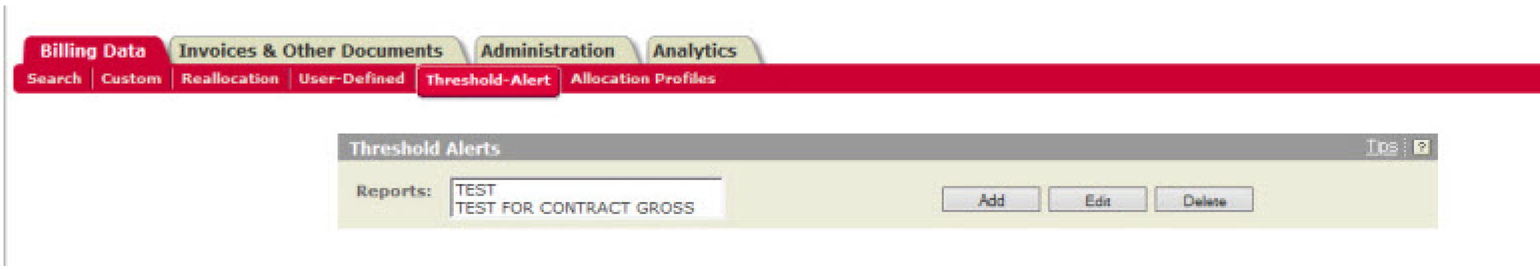
- Contract Gross Limit (amount before monies are taken off/added to meet contract amount)
- Contract Net Limit (amount after monies are taken off/added to meet contract amount)
- Transactional Gross Limit
- Transactional Net limit
- Total Charge Limit

How do I add a new Threshold Alert?

1. Select the **Billing Data** tab.
2. Select the **Threshold Alert** tab.
3. Click **Add** to create a new threshold alert.
4. Enter a **Threshold Alert Name**.
5. Select the **Client ID(s)** you want to use.
6. Enter threshold values in one or more of the limit boxes.
   - Contract Gross Limit
   - Contract Net Limit
   - Transactional Gross limit
   - Transactional Net Limit
   - Total before Tax Limit
7. Enter up to 25 addresses in the **To** email addresses box.
8. Enter or modify the current **Message**.
9. Enter or modify the **Subject** for the email.
10. Click **Save** to create the threshold alert.

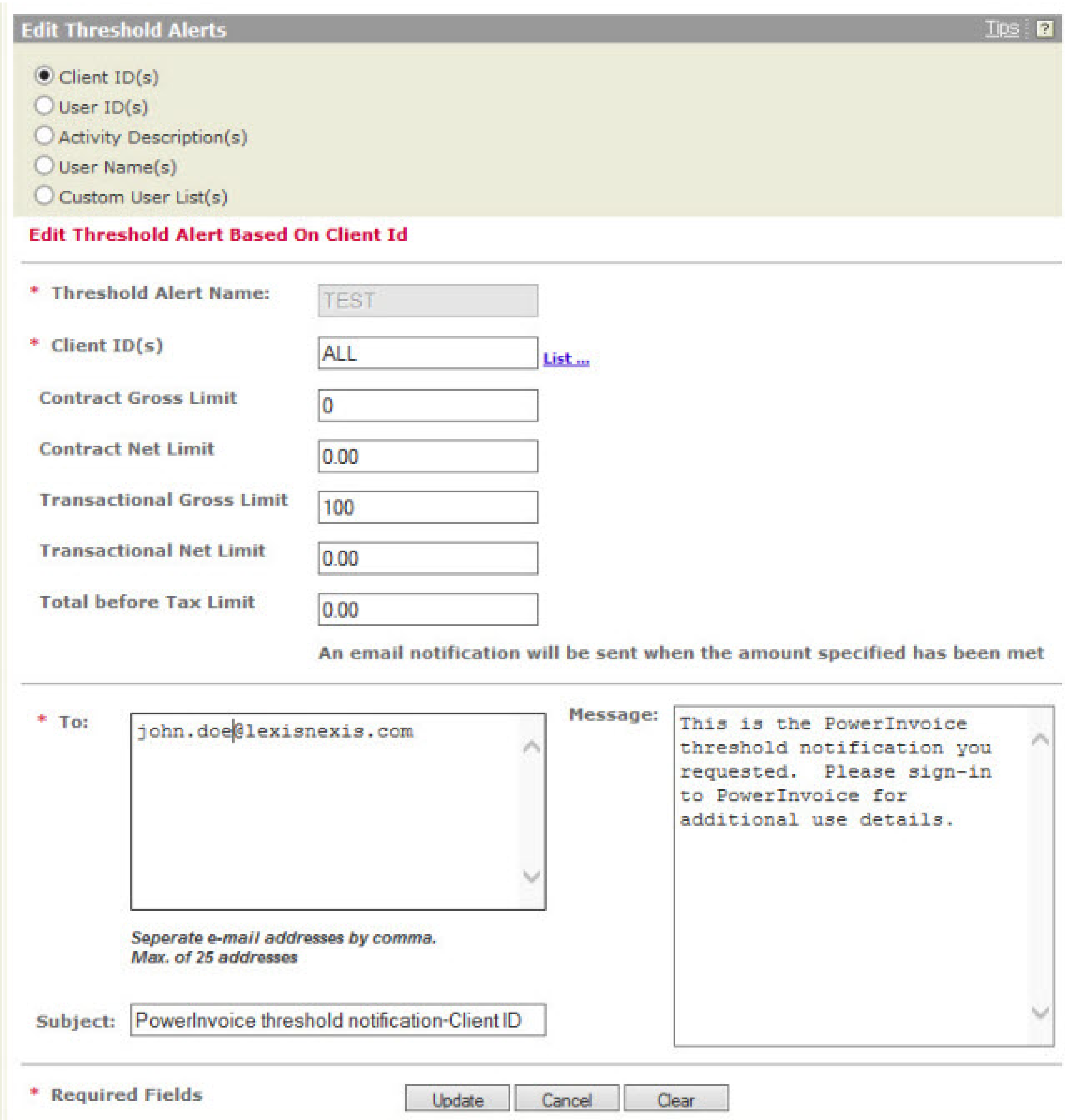
The new threshold alert will now show in the Threshold Alerts **Reports** list.

You can edit and delete these threshold alerts using the appropriate buttons.



How do I edit a Threshold Alert?

1. Select the **Billing Data** tab.
2. Select the **Threshold Alert** tab.
3. Select a **Report**.
4. Click **Edit**.



5. Modify the information, as desired.
6. Click **Update** to create the threshold alert.

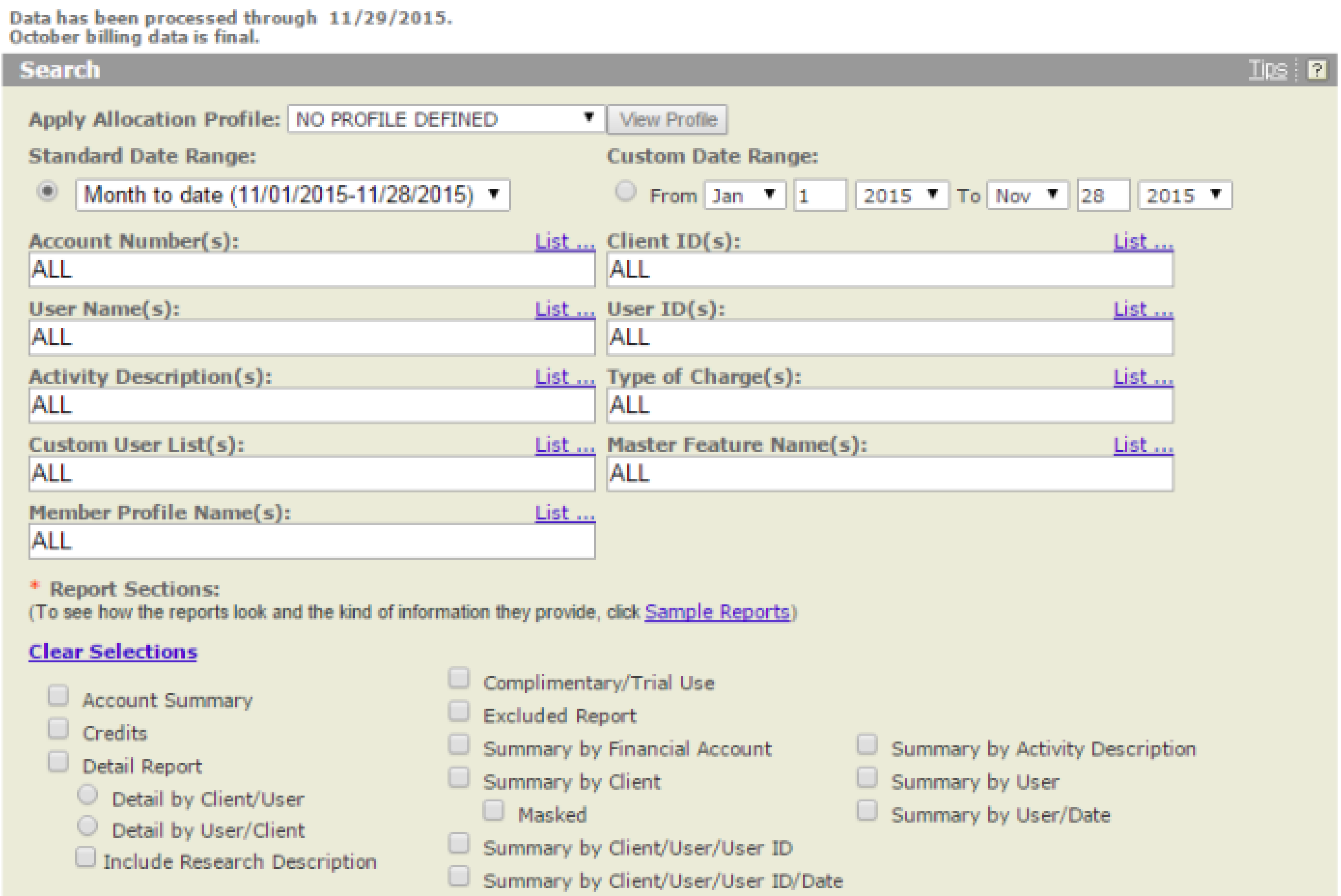
How do I delete a Threshold Alert?

1. Select the **Billing Data** tab.
2. Select the **Threshold Alert** tab.
3. Select a **Report**.
4. Click **Delete**. A dialog box appears asking if you're sure you want to delete the selected threshold alert.
5. Click **OK** to confirm deletion of the selected threshold alert.

Allocation Profiles

All Organizational Customers can view allocation profiles in LexisNexis® PowerInvoice™ service. This allows for non-billable use to be removed and not impact billing for billback purposes.

You can Add, View, Edit, Copy, or Delete an allocation profile, using the buttons provided on the **Allocation Profiles** tab under the **Billing Data** tab.



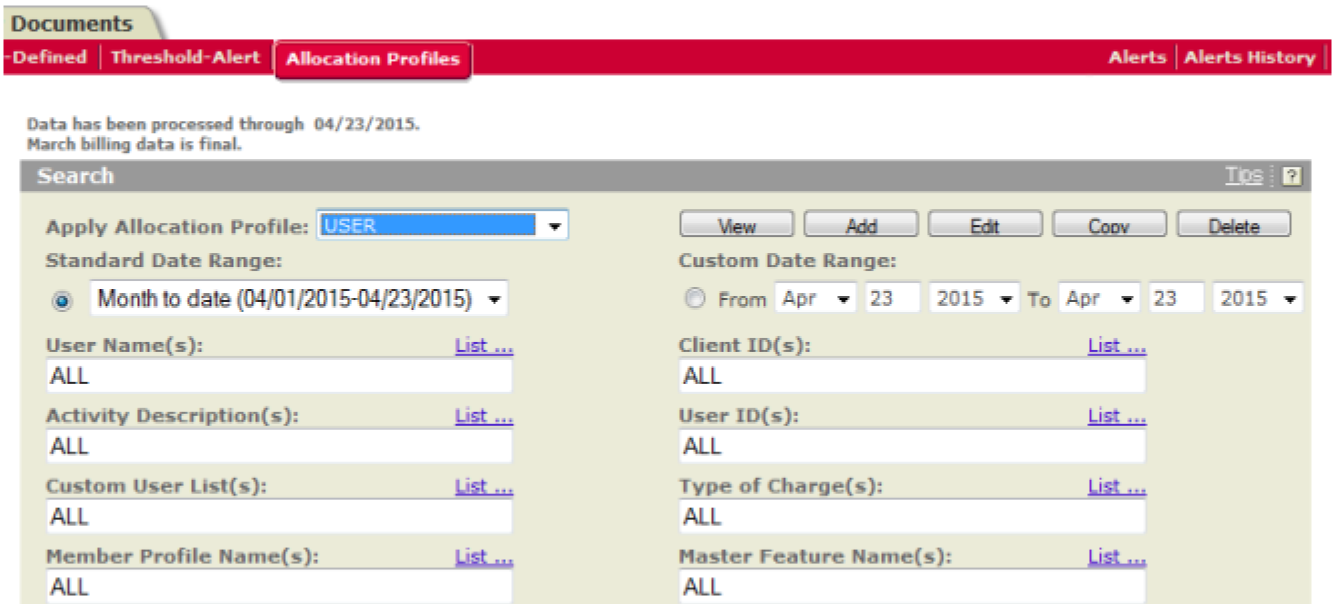
Note:

Items to note about allocation profiles include:

- It may take up to 15 minutes to get the initial report
- Results are sent using email, unless the report size is larger than 9 mb. If a report is too large, then you will need to sign in to access the report
- You can have as many allocation profiles as you'd like
- When you add an allocation profile, the new profile name is instantly available as a filter in other search forms using **Apply Allocation Profile**

How do I create a new Allocation Profile?

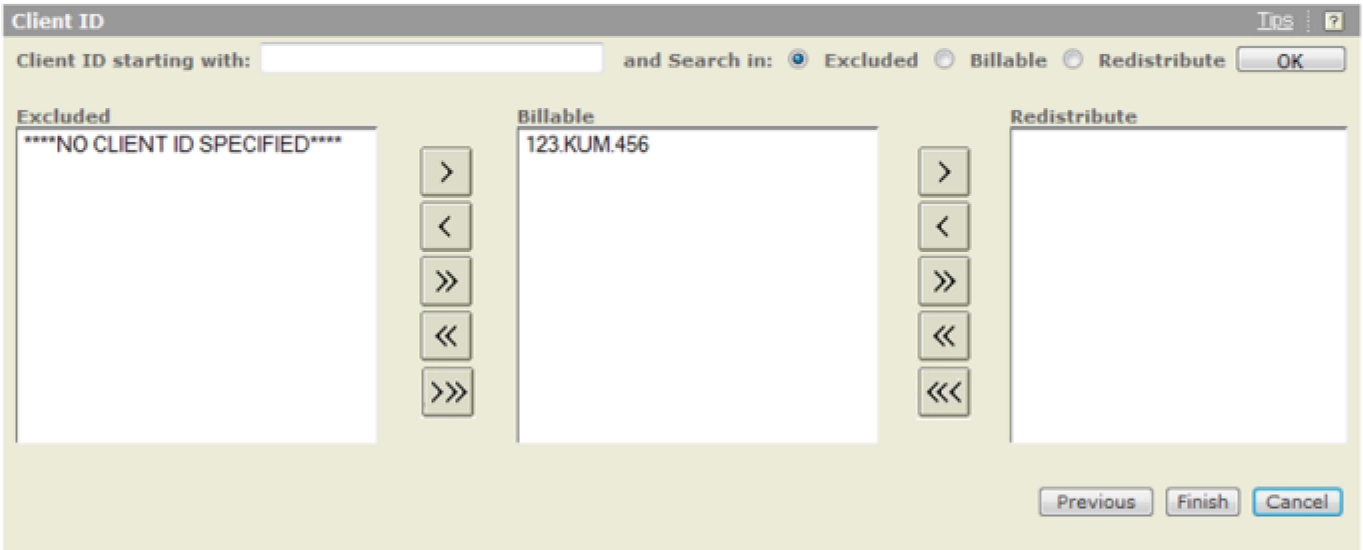
1. Select the **Billing Data** tab.
2. Select the **Allocation Profiles** tab.
3. Click **Add** to create a new profile.



4. Select the Account Number you want to use and click **Next**.

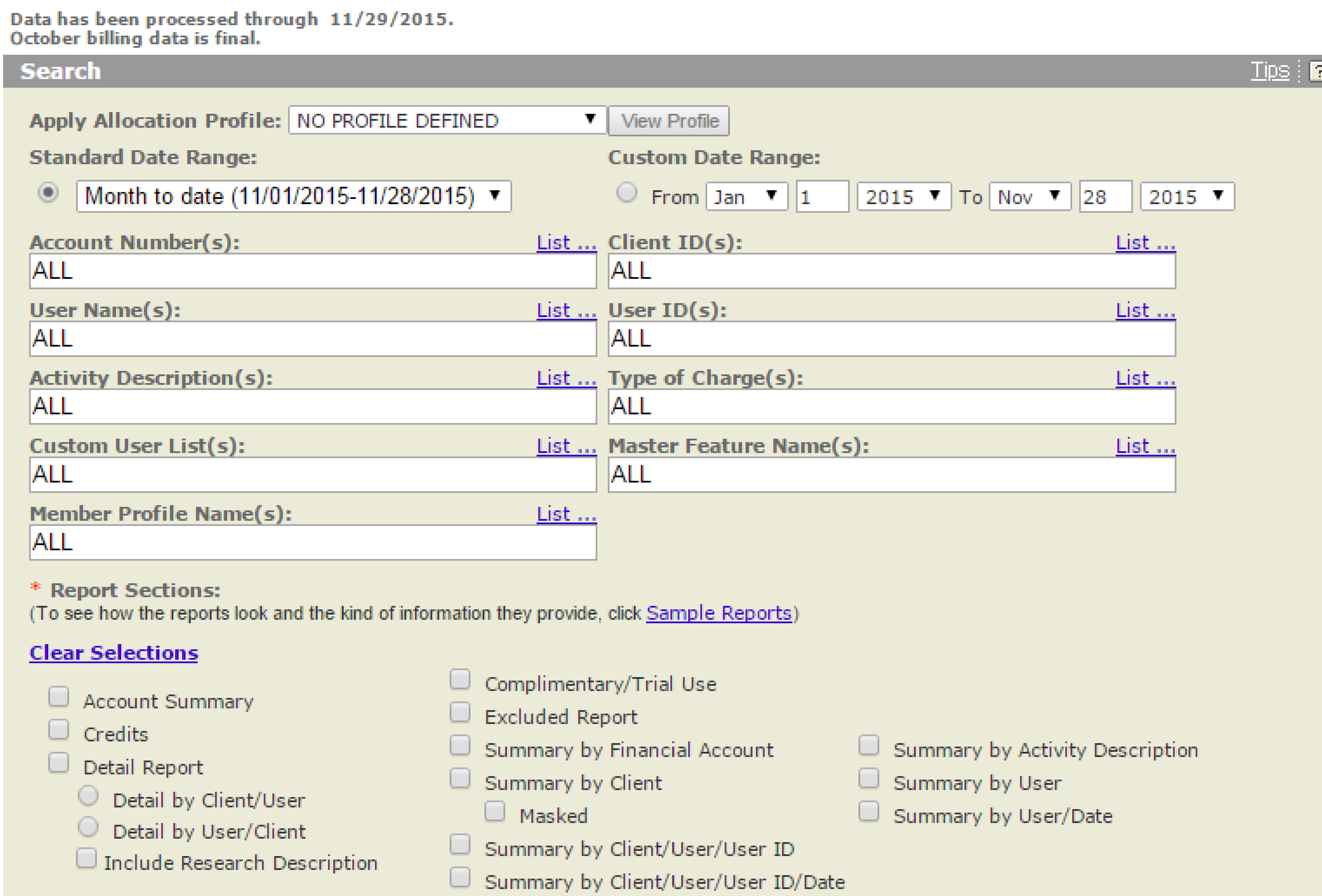
> **Note:**
> Only one Financial Account can be selected.

5. Enter a **Profile Name**.
6. Choose at least one **Report Selection Criteria** and click **Next**.
7. Move the report criteria elements to the proper columns.
   - Excluded – Removes the charges entirely
   - Billable – These are billable users, clients, etc (redistributed charges would allocate to these)
   - Redistribute – Redistributes charges amongst the other billable users, clients, etc.
8. Click **Finish** to create the Profile.



The new profile name will now show in the drop-down list to easily run the predefined allocation report.

You can edit and delete these profiles using the appropriate buttons.



Invoices

The PowerInvoice service gives you instant access to up to 24 months of invoice data for your organization. Just fill out a PowerInvoice search form to locate the one or more invoices you want to retrieve. You can then browse through the various reports that comprise each invoice, print a copy of the ones you want, or download the information to your PC. You can even get a facsimile of the invoice, in PDF format, if you'd like. (Invoice images not available to all customers.)

In addition, you can:

- View all of your account activity - invoices, payments, credit memos and adjustments - over the past 24 months
- See your current account balance, which includes any amounts carried over from previous months, not just current charges
- Choose to receive an email alert that your invoice is ready online
- Pay account balances online (please click instructions for registering)

For a quick overview of options for working with invoices, see payinvoiceonlineoverview_cpt.html.

How do I find an invoice?

1. Click the **Invoices & Other Documents** tab, then select the **Basic** tab, if necessary.
2. Choose a **Standard Date Range** or a **Custom Date Range** to see a snapshot of your company's use in a particular month. This is a quick way to retrieve the monthly invoice for one or more account numbers.
3. Once you've made your selections, click **View** to search.

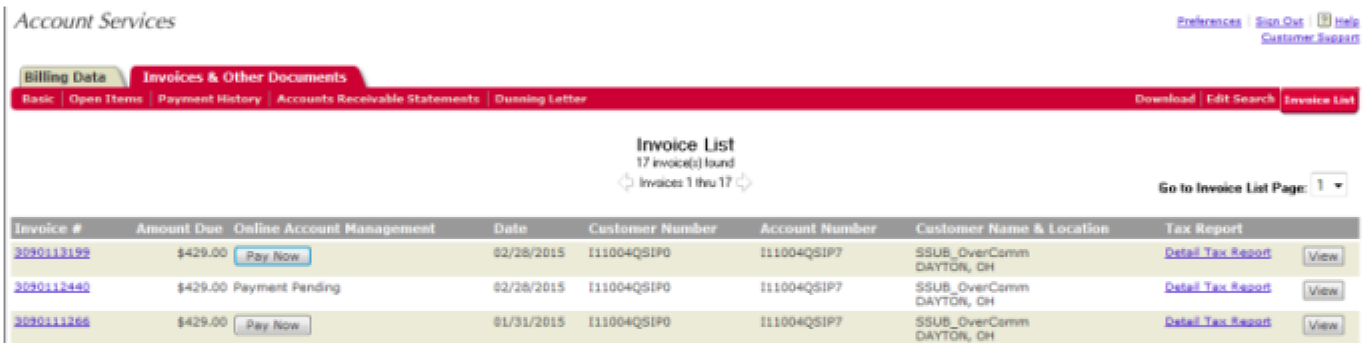
How do I view an invoice?

Once your search is complete, you'll see an invoice list that shows you the invoices that match your search criteria.

Options on this page include:

- Click **Edit Search** if you want to edit your search criteria.
- Click **Download** to download an invoice without viewing it.
- Click an Invoice Number link to go directly to the first page of the invoice.
- Click a **Pay Now** button to pay the invoice online using a credit card or electronic fund transfer (EFT).

Invoices tab



Below is an example of how an invoice may look in the PowerInvoice service. What you see depends on your search request.

Invoice Result

LexisNexis®

US FEDERAL TAX ID 52-1471842
CANADIAN GST REGISTRATION NUMBER 123397457 RT
DUN AND BRADSTREET NUMBER 87-767-2683
LexisNexis, a Division of Reed Elsevier Inc.

INVOICE TO:
Customer Number: I11004QSIP0
Attn: .
SSUB_OVERCOMM
9443 SPRINGBORO PIKE
DAYTON OH 45449
UNITED STATES

Invoice Period	Invoice Date	Invoice Number	Account Number	Payment Due	Amount Due in USD
01-FEB-2015 to 28-FEB-2015	**28-FEB-2015**	**3090113199**	**I11004QSIP7**	**10 Days from Receipt of Invoice**	**$5,195.84**

Summary Current Period Charges	
Current Period Charges	$400.00
Current Period Charges - Taxes	$29.00
Total Current Period Charges	$429.00

Account Summary	
Previous Balance	$4,766.84
Payments/PrePayments	$0.00
Prior Period Credits	$0.00
Prior Period Credits - Taxes	$0.00
Adjustments	$0.00
Total Current Period Charges	$429.00
Total Amount Due	**$5,195.84**

On this page, you can:

- Click **Pay Now** to pay the invoice online using a bank fund transfer.
- Click **Download** to download the invoice.
- Click **Edit Search** to edit your search.
- Click **Invoice List** to go back to the invoice list.

How do I download an invoice?

1. Click the **Invoice** link. A PDF of the invoice opens.
2. Click **Download**, select the invoice, and select the Download format.

How do I view open invoices?

This feature lets you view your current open invoices.

1. Click **Download** to download the Open Items Report in HTML or PDF.
2. Click an invoice number to view the invoice details.
3. Click **Pay Now** to pay the invoice online using a bank fund transfer.

How do I view payment history?

This feature gives you access to all of your account activity—invoices, payments, prior period credits.

1. Click to search for payment history for a specified date range. You might choose the past 90 days, a particular month or a custom date range.
2. Click to select the types of payment history items you'd like to view.
3. If applicable, enter a specific invoice number.
4. If applicable, enter a specific check number.
5. Click **View** to view selected payment history.

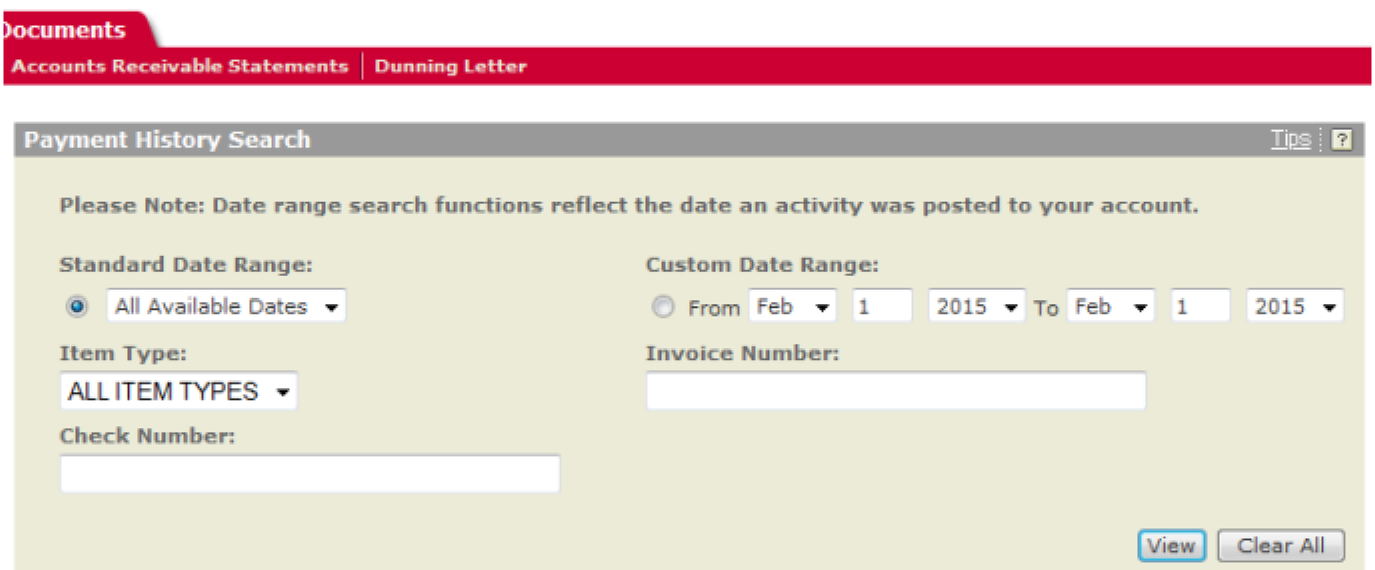
Tip:
Once the PDF invoice image opens, you can only view the PDF; all other functions require you to go back to the browser to pay the invoice.

If you choose no search criteria, you will receive all payment history items.

On this page, you can:

- Click **Edit Search** to edit your search criteria.
- Click **Download** to download payment history.
- Click a link to view a specific invoice.
- Click **Pay Now** to pay the invoice online with a bank fund transfer.

Payment History Search



Payment History

es & Other Documents

nent History | Accounts Receivable Statements | Dunning Letter

Report Date: 02/27/2015
Data Processed Through : 02/09/2015
Customer Number I11004QSIP0

SSUB_OverComm
9443 SPRINGBORO PIKE
DAYTON, OH 45449-5449

Payment History

Activity as of 02/25/2015

Posted Date	Item Number	Online Account Management	Item Type	Invoice Date	Tax Report	Check Number	Item Amount	Currency
02/09/2015	3090113199	Pay Now	INVOICE	02/28/2015	Detail Tax Report		429.00	USD
02/05/2015	3090112440	Payment Pending	INVOICE	02/28/2015	Detail Tax Report		429.00	USD
02/01/2015	3090112059	Pay Now	INVOICE	01/31/2015	Detail Tax Report		429.00	USD
01/27/2015	3090111266	Pay Now	INVOICE	01/31/2015	Detail Tax Report		429.00	USD

Overview - Paying Your Invoice Online

This article provides overview information about working with invoices.

- Registering for Automatic Payments
- Searching for Invoices
- Paying Invoices Online
- Updating Your Online Payment Options

Registering for Automatic Payments

The LexisNexis PowerInvoice service now offers new features for paying invoices online.

When you receive your invoice, click the NewPowerInvoice link in the email, then sign in to LexisNexis® PowerInvoice™ service with your Lexis Advance® ID and password.

Once you have signed in, select the **Preferences** link in the upper right of the page to register for online account management.

Select the **Account Management** tab to register your credit card or bank information.

Tip:
If you choose to pay automatically, your selected payment option will be used, and you will not need to pay each invoice separately.

When the **Automatic payment Terms of Use** dialog appears, click **I Accept**. You will then see a confirmation screen with automatic payments shown as On.

Searching for Invoices

PowerInvoice will display the last 24 months of invoices for your organization. You can click either the **Basic** or the **Open Items** tabs to locate invoices.

- The Basic tab allows you to search for a specific invoice or date range
- The Open Items tab will only display invoices that are open or unpaid

Basic Tab

Search by **Custom Date Range** or **Standard Date Range** (month by month).

Click **View** once you've set your date range.

Once your search has run, it will return a cite list of invoices matching your search criteria. This list will include both paid and unpaid (open) invoices.

Click the **Invoice Number** link or click the **View** button on the right to pull up the invoice.

Open Items Tab

Use **Open Items** to display only unpaid invoices. If registered without the automatic payment option, then you will see a Pay Now button next to the invoice. You will also see **Pay Now** next to unpaid invoices after a Basic invoice search.

Clicking **Pay Now** will open the invoice to go through the payment process.

Note:
The **Pay Now** button will only show if you have not selected the automatic payment option.

Paying Invoices Online

If you choose not to set up an automatic payment option, you can pay each invoice monthly.

Fill out your bank account information (on left) or credit card information, or use preexisting information.

Click **Submit Payment**.

Review your payment confirmation, then click **Finish**.

Your Invoice status changes to Payment Pending.

Note:
If you use the automatic payment option, you will automatically see Payment Pending.

Updating Your Online Payment Options

If you need to modify your online payment settings:

Click **Preferences** to update your online payment options anytime.

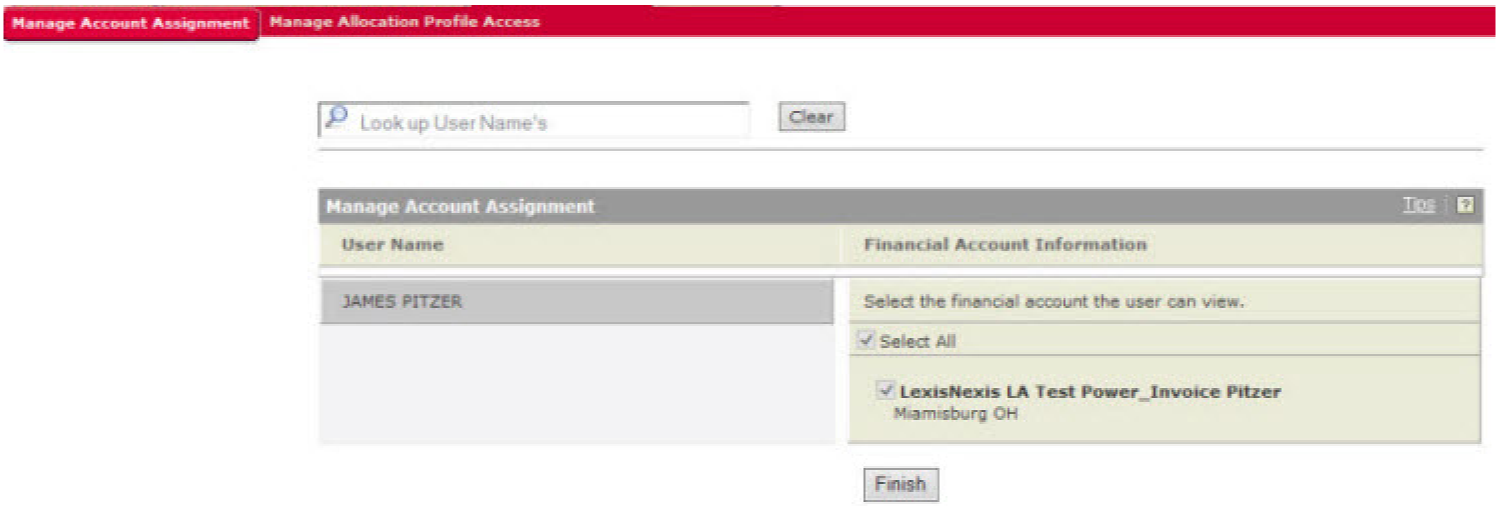
Select the **Account Management** tab to see and change your online payment registration options.

Using the Administration Tab

The LexisNexis PowerInvoice service provide PowerInvoice administrators the opportunity to assign specific users with access to one or more financial accounts. The users can then view the billing data and invoices, and set up autopayment of invoices.

How do I manage accounts?

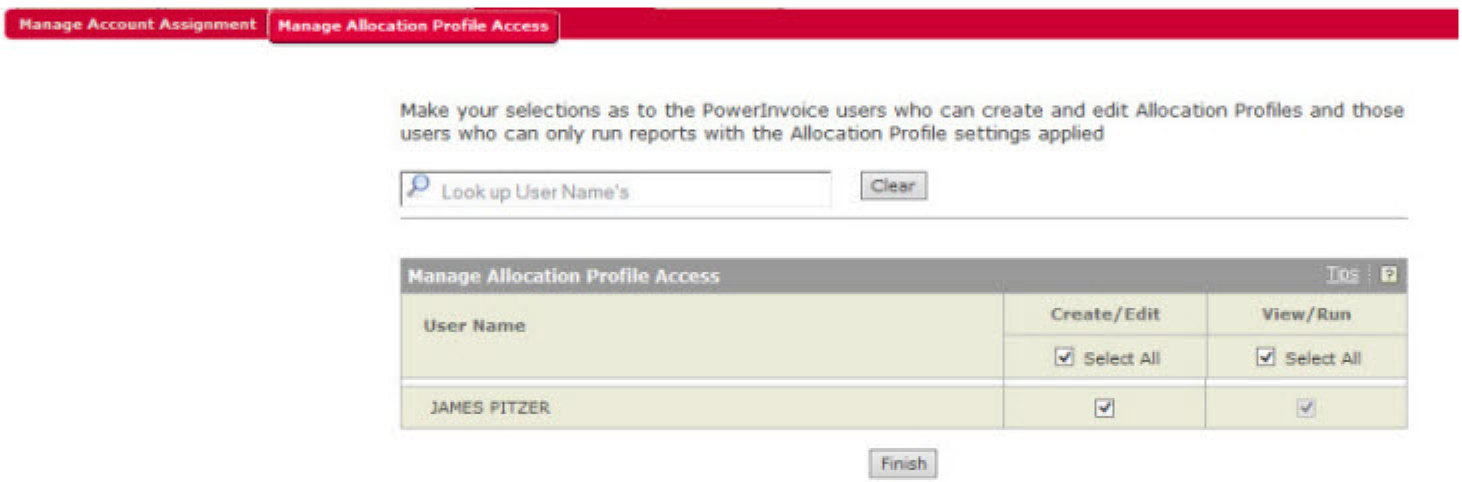
1. Click the **Administration** tab.
2. Enter a User Name in the box, if desired.
3. SSelect a **User Name**.
4. Select which **Financial Account Information** you'd like this user to have assigned to them.
5. Click **Finish**.



How do I manage Allocation Profile Access?

Managing allocation profile access allows a PowerInvoice administrator to assign specific users the ability to create new or edit existing allocation profiles, while other users can only select a profile to use/run data through the profile.

1. Click the **Administration** tab.
2. Click the **Manage Allocation Profile Access** tab.
3. Enter a User Name in the box, if desired.
4. Select the **Create/Edit** and/or the **View/Run** boxes for each user, as desired.
5. Click **Finish**.



Working with the Analytics tab

The LexisNexis PowerInvoice service provides Analytics information.

On the Analytics tab, you can select from the **Saved Chart Profiles** and then Edit, Copy, Delete or View the selected profile. Or you can click **Create Chart Profile** to set up a new chart profile, by specifying a profile name, a date range, and one or more attributes; specifying how the information will be displayed; specifying one or more functions to use; choosing whether to view by Amount or Percent; and then clicking **Finish**. Once the chart is displayed, you can then choose to **View PDF** and you can save the PDF file, if you'd like to.

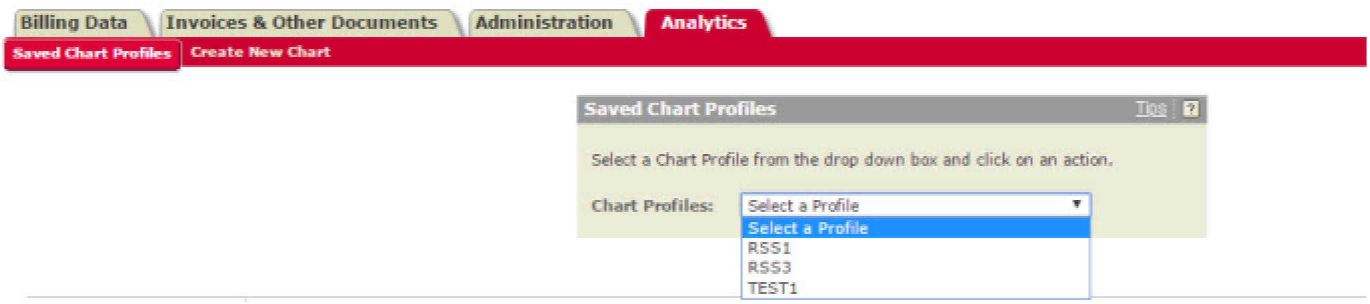
How do I work with Saved Chart Profiles?

1. Click the **Analytics** tab.
2. Select a profile name from the **Chart Profiles** drop-down list.
3. Select an Action to take: Edit, Copy, Delete, or View.
   If you select Edit or Copy, you will be taken to the **Edit Chart Profile** page, which works similarly to the Create New Chart page. See How do I create a New Chart profile?.

   If you select Delete, you will be asked to confirm your choice to delete the profile, and once you've confirmed your choice, the profile will be permanently deleted.

   If you select View, the chart will be displayed in a new window.

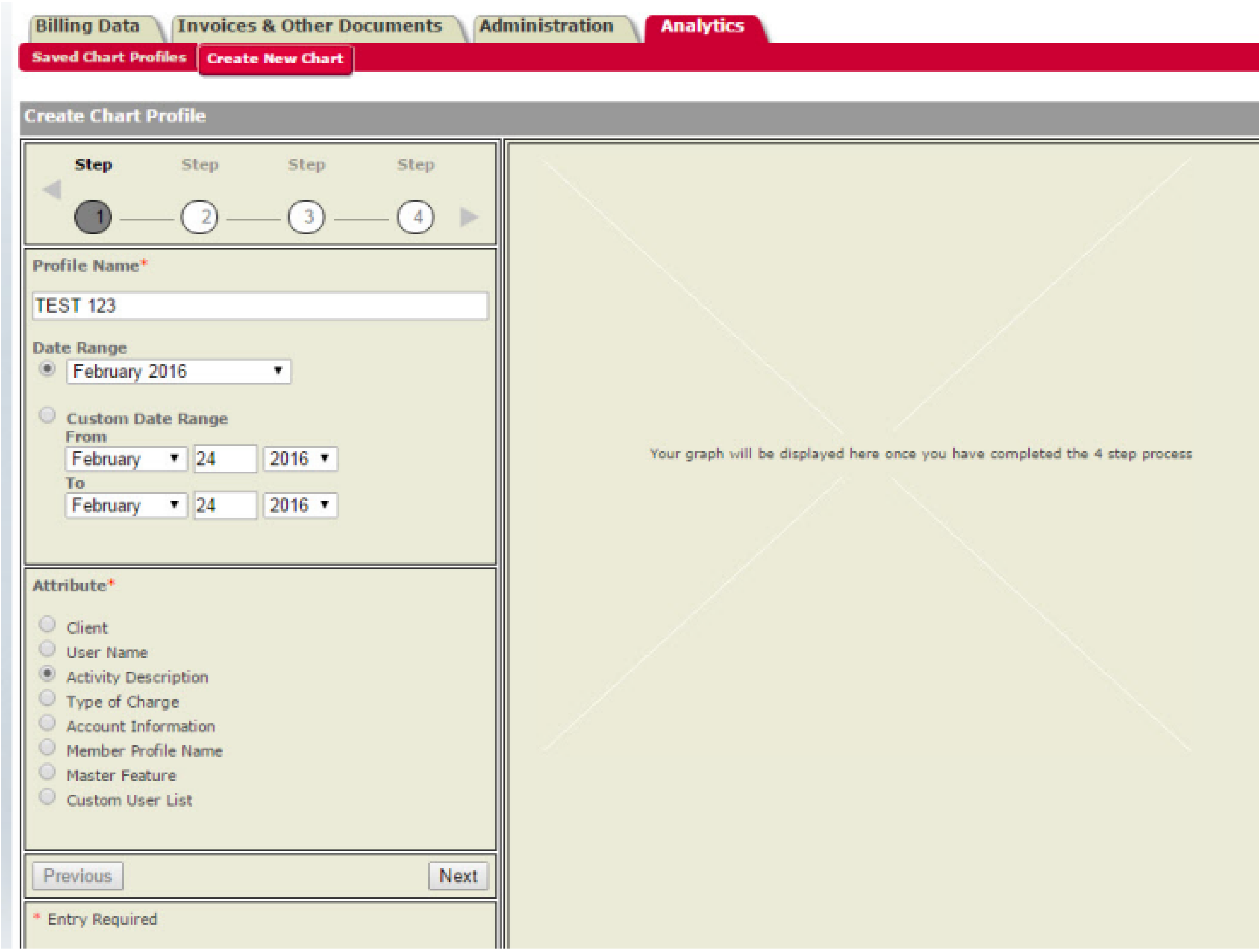
Saved Chart Profiles



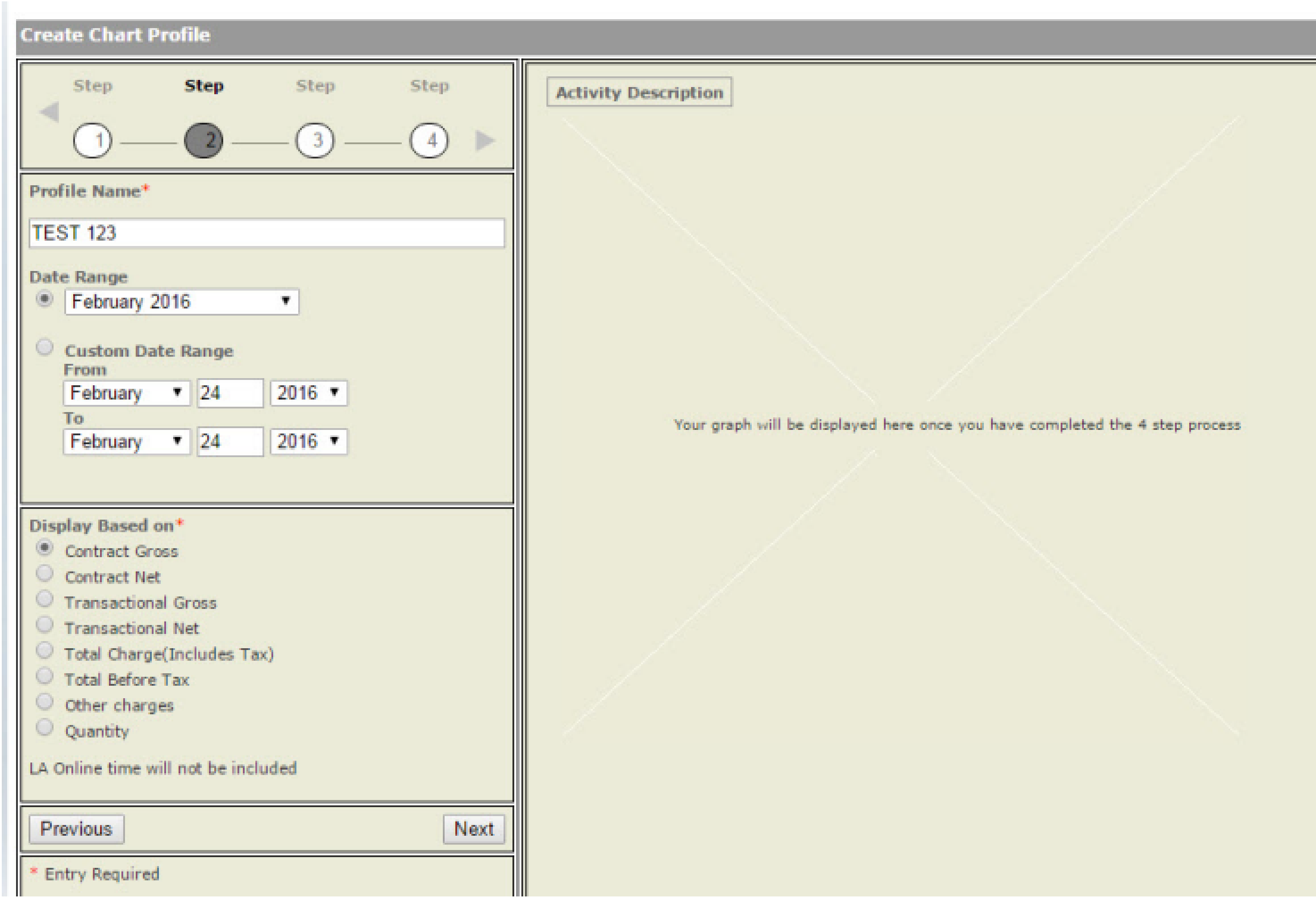
How do I create a New Chart profile?

Important:
If you click **Finish** and are told that no data matches your criteria, you can use the **Previous** and **Next** buttons to go back through the options and change them.

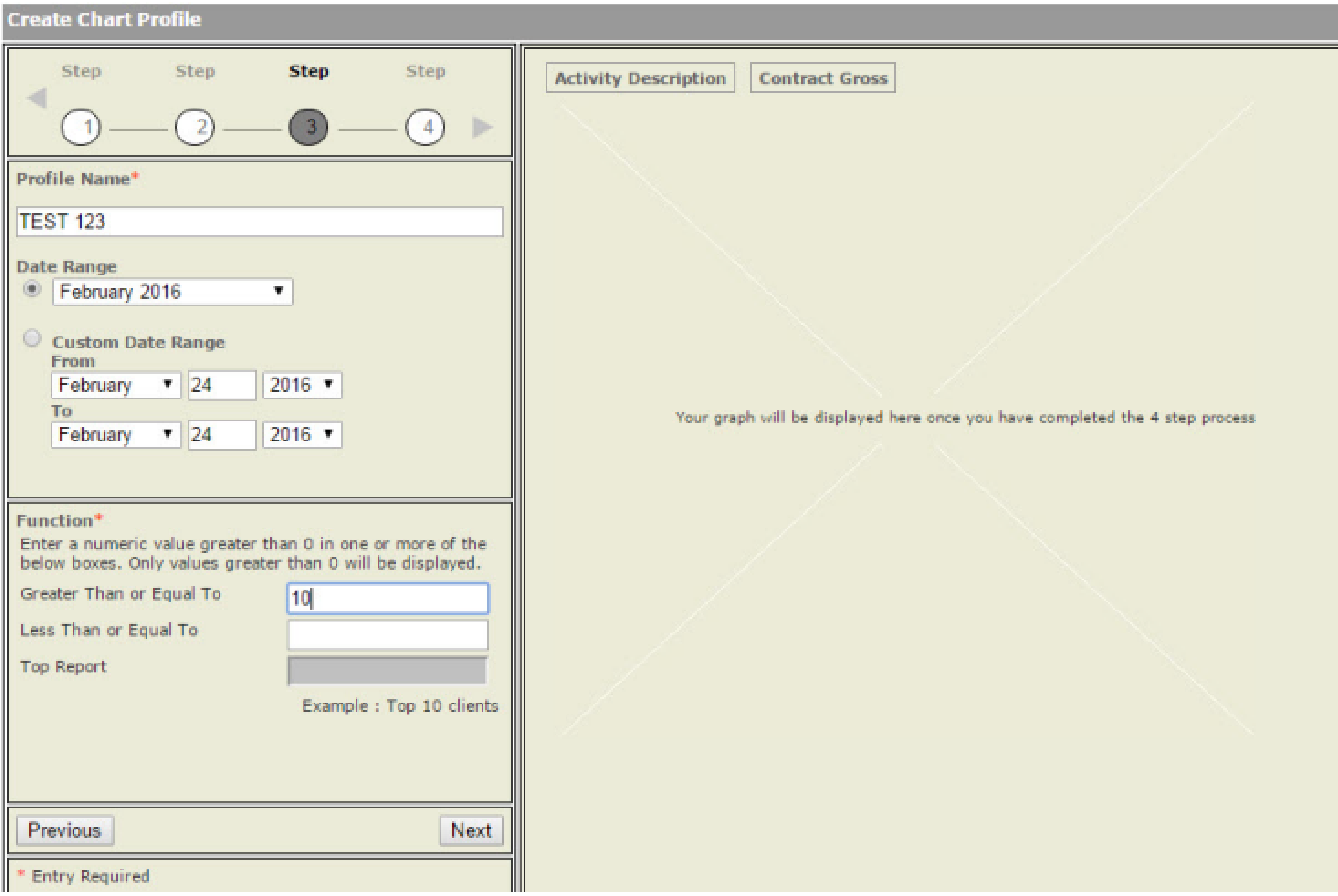
1. Click the **Analytics** tab.



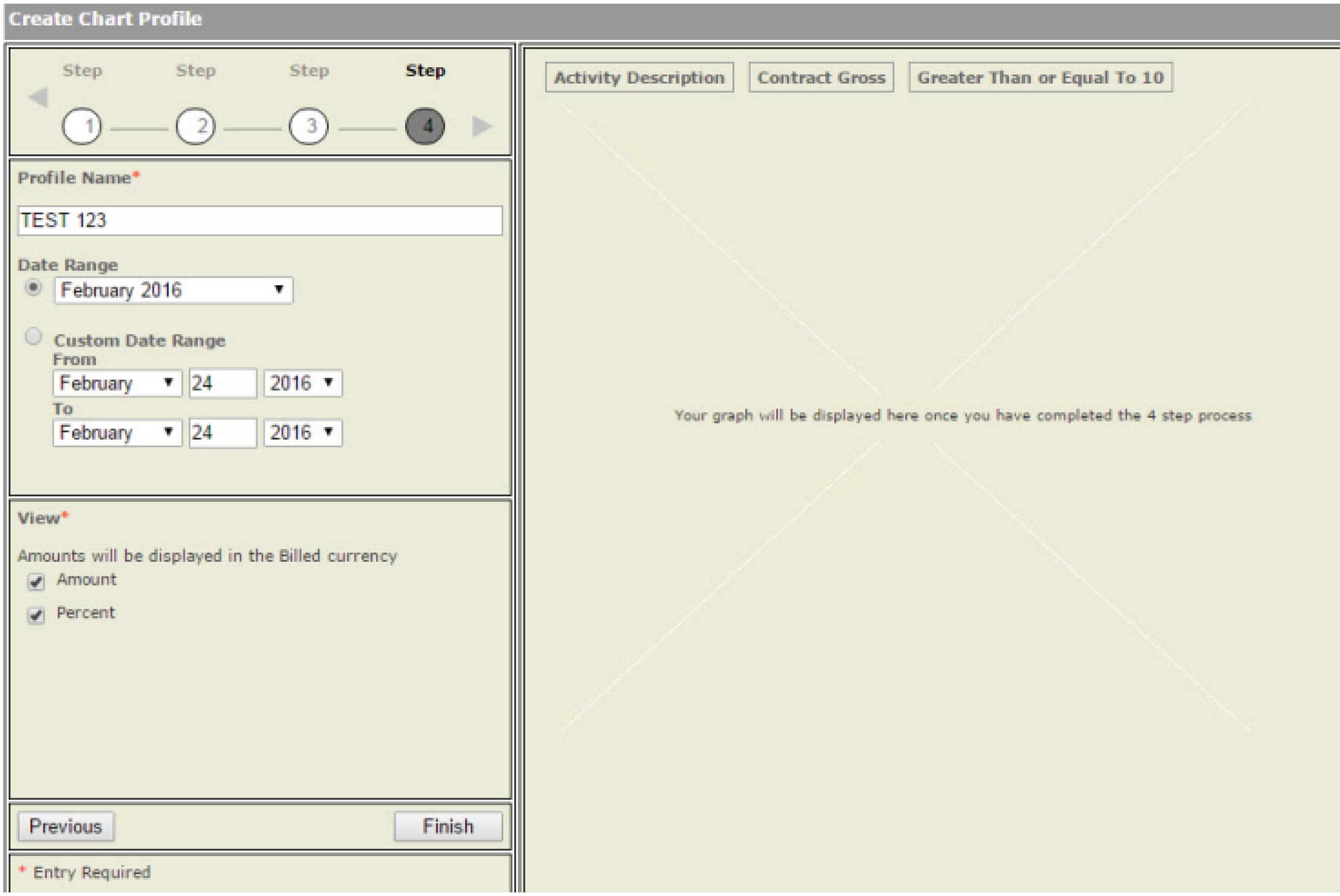
2. Click the **Create New Chart** tab.



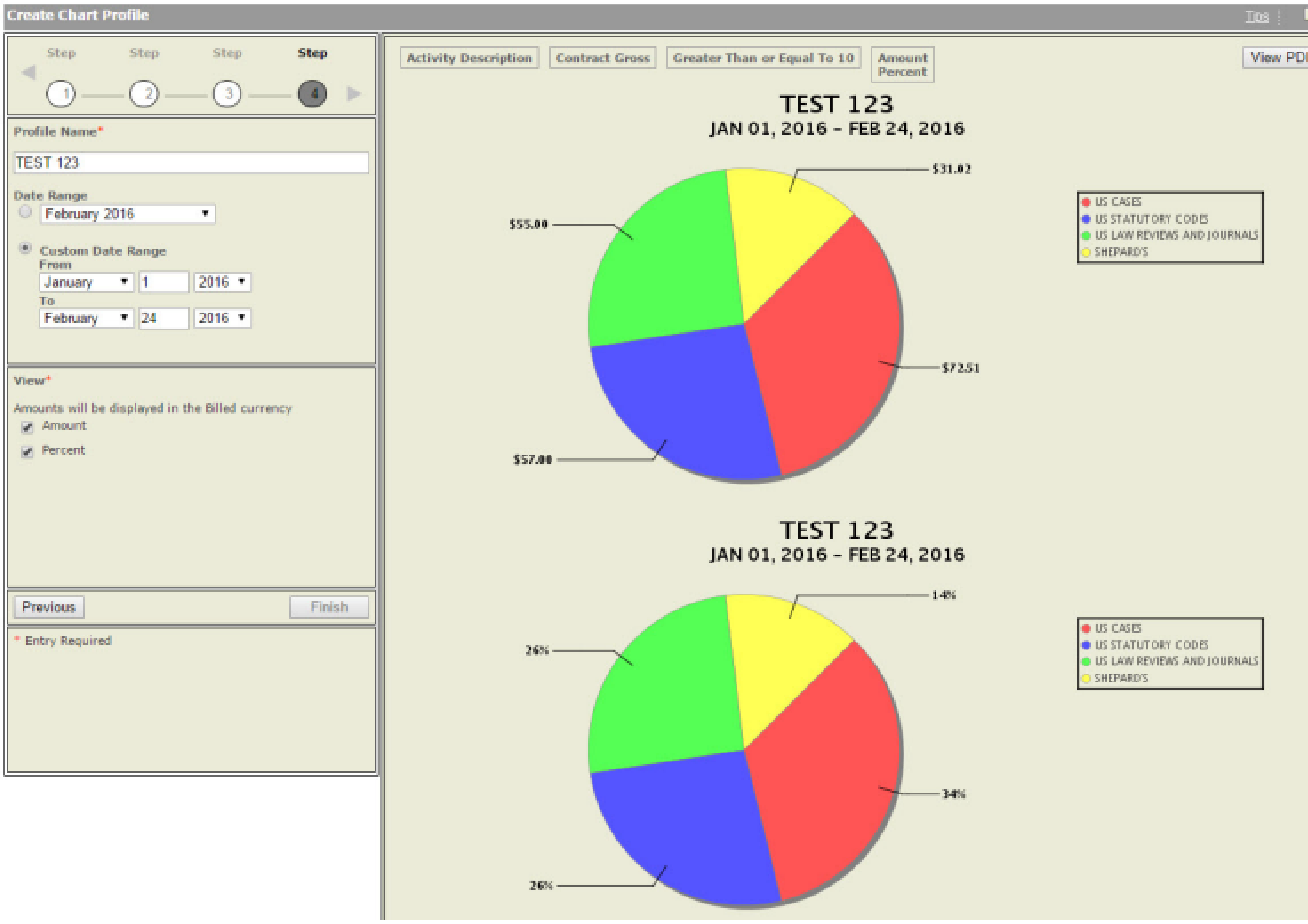
3. Enter a new **Profile Name**.



4. Choose **Date Range** options.

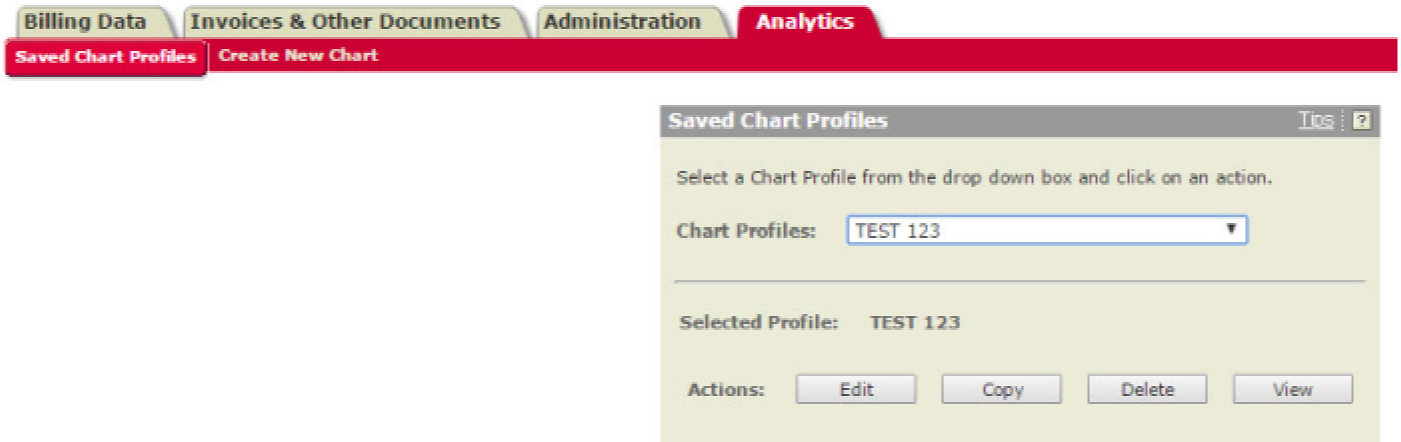


5. Select one or more boxes under **Attribute**.



6. Click **Next**.
7. Select an option under **Display Based on**.
8. Click **Next**.
9. Enter a numeric value in at least one of the **Function** boxes.
10. Click **Next**.
11. Select one or more boxes under **View**.
12. Click **Finish**. The chart is displayed to the right of the settings. You can click **View PDF** to open the chart in a PDF viewer, and use that tool to save the chart, if desired.

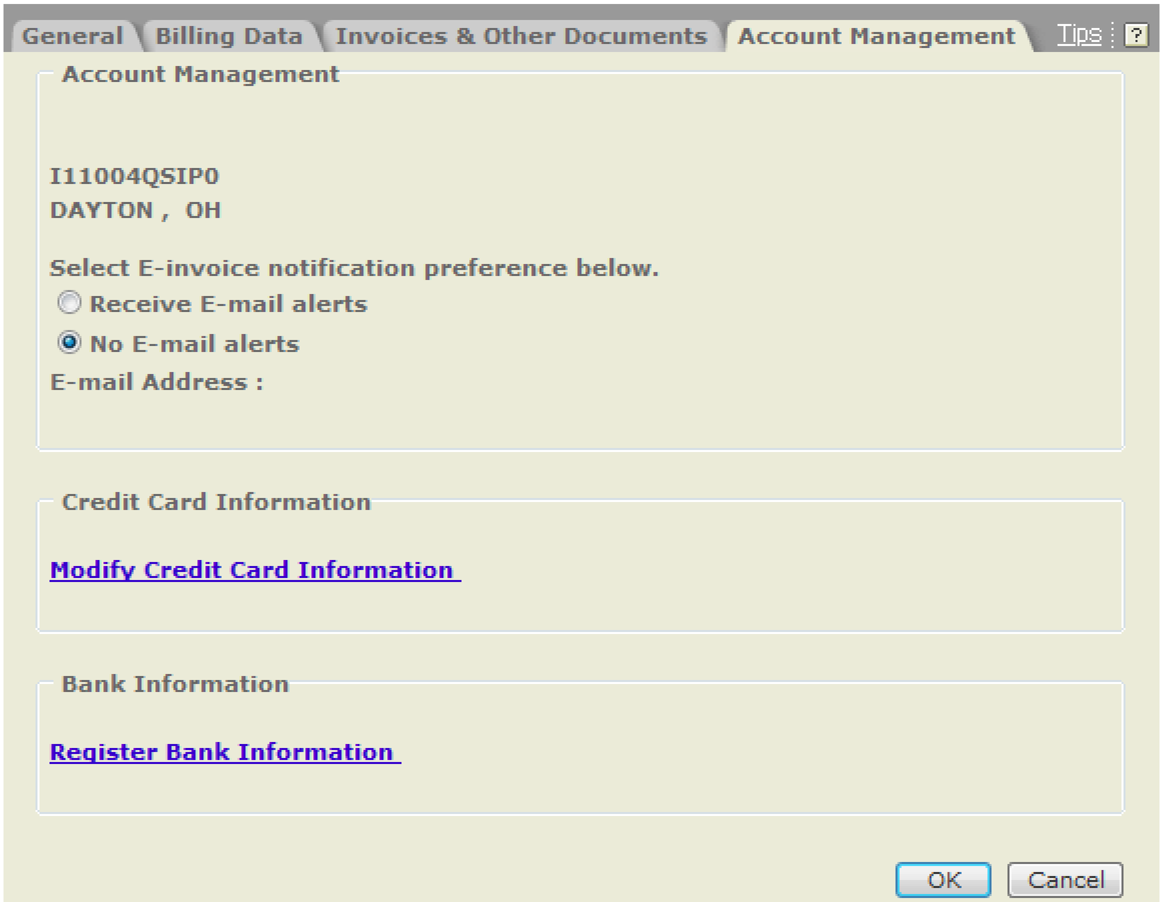
Edit, Copy, Delete, View Analytics Chart


Billing Data
Invoices & Other Documents
Administration
Analytics
Saved Chart Profiles
Create New Chart
Saved Chart Profiles
Tips
Select a Chart Profile from the drop down box and click on an action.
Chart Profiles:
TEST 123
Selected Profile:
TEST 123
Actions:
Edit
Copy
Delete
View

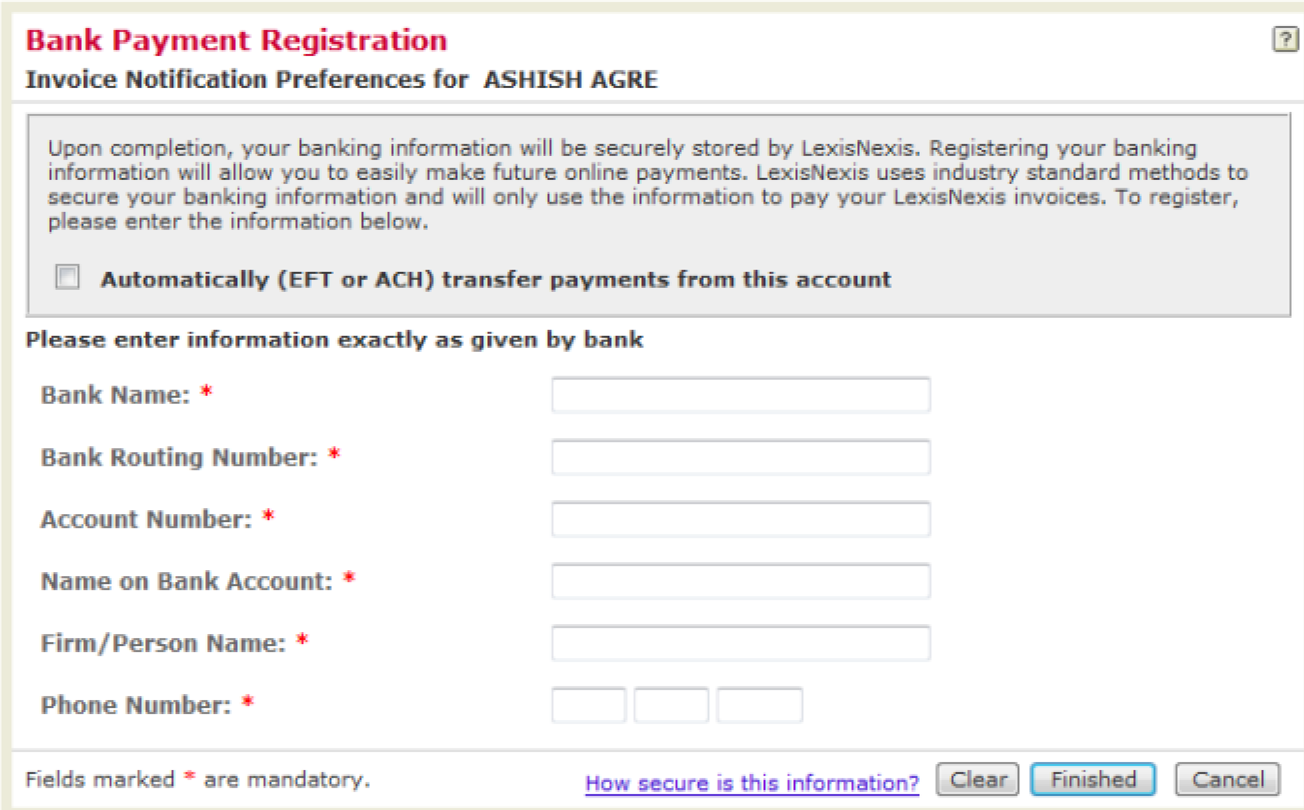
Registering for Online Account Management

How do I pay for my PowerInvoice services?

1. After you have set up your online account management, you can easily pay directly from the Invoice screen.



2. Click **Pay Now** to begin payment process. If auto-payment is selected, clicking the Pay Now button is not required.



3. Enter information in all fields marked with an asterisk (*).
4. Click **Submit Payment** to complete your transaction.
   An email will be sent to the user indicating that the payment is in process.

   The Payment Confirmation page confirms that the payment has been processed. Click Finish to complete the process.

	CONTRACT USE			TRANSACTIONAL USE					
CLIENT	GROSS AMOUNT	ADJUSTMENT	NET AMOUNT	TRANSACTIONAL GROSS AMOUNT	TRANSACTIONAL ADJUSTMENT	TRANSACTIONAL NET AMOUNT	TOTAL BEFORE TAX	TAX*	TOTAL CHARGES
****NO CLIENT ID SPECIFIED ****	$0.00	$0.00	$0.00	$0.00	$312.90	$312.90	$312.90	$0.00	$312.90

Note that the status in the Invoice List changes to Payment Pending.

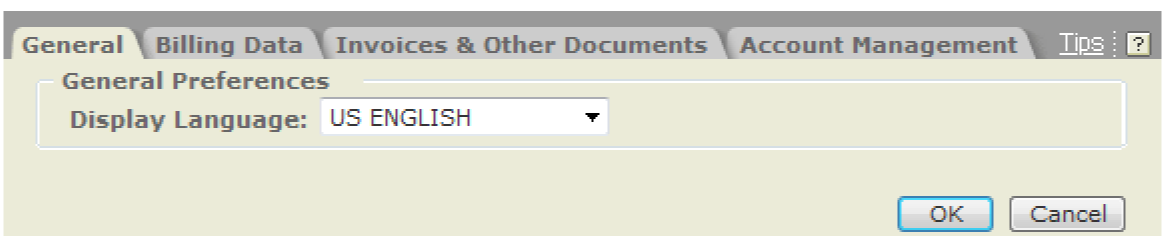
Preferences

How do I set my preferences?

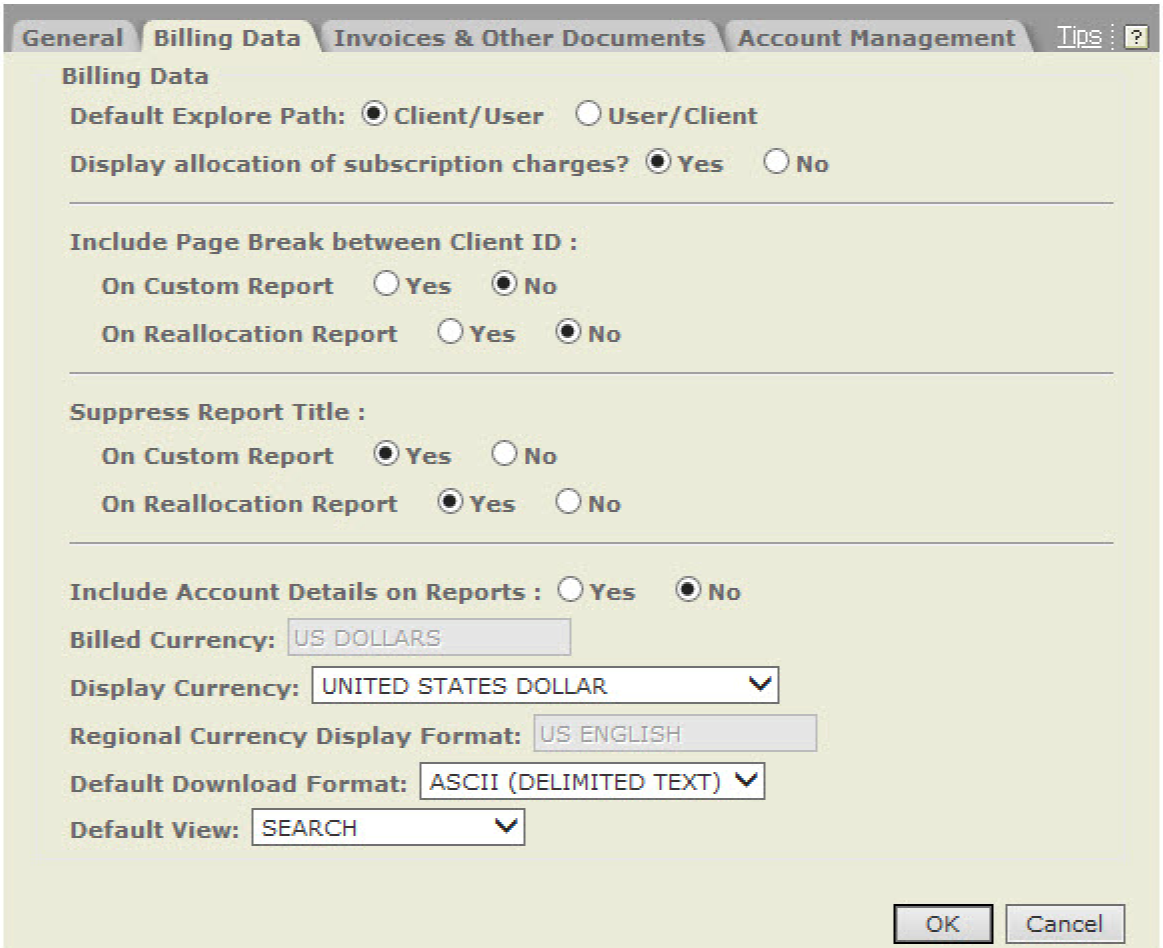
Tip:
On each Preferences tab, you must click **OK** to save any changes you make.

1. On the **General** tab, select a **Display Language** for the PowerInvoice service (does not apply to the PowerInvoice sign-on screen).
2. On the Billing Data tab, choose a **Default Explore Path -** the order in which your billing data appears in a billing report. Sort by client and then by user or by user and then by client. You can also set whether you want to **Include Account Details on Reports**.
3. Choose whether or not to see an allocation adjustment for subscription pricing charges at the account, client, service and user levels (if you choose No, you'll see gross charges only).
4. Select a **Display Currency** for the currency you wish to see displayed in your report.
5. Choose the **Default Download Format**.
6. Choose the **Default View** (page) you want displayed when you select the Billing Data tab.
7. On the **Invoices & Other Documents** tab, choose the number of invoice search results you want displayed in a page.
8. Choose which page you want displayed when you select the **Invoices & Other Documents** tab.
9. On the **Account Management** tab, use the links provided to **Modify Credit Card Information** or **Register Bank Information**.

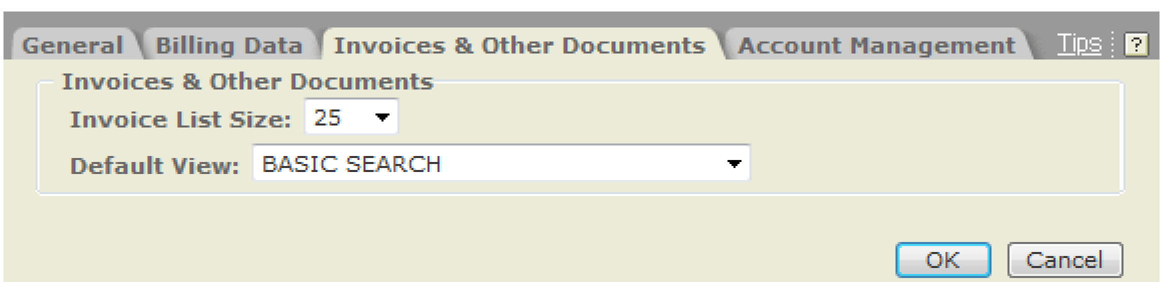
General Preferences



Billing Data Preferences



Invoices & Other Documents Preferences



Account Management Preferences

How do I set my account management preferences?

Tip:
On each Preferences tab, you must click **OK** to save any changes you make.

1. On the **Account Management** tab, enter your email address in order to receive invoice-ready notifications or payment confirmations.
2. Click **Register a credit card** to enter or modify credit card information for your account.
3. Click **Register Bank Information** to enter or modify bank information in order to pay your invoices online.

Account Management Preferences

Help

When you have questions about using the PowerInvoice service, you can:

- Click the **Help** link at the top-right corner of the screen for comprehensive help that can remain open while you're using the PowerInvoice service
- Call LexisNexis Customer Support at 1-800-543-6862