LexisNexis® PowerInvoice™ Service User Guide

LexisNexis®

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LexisNexis® PowerInvoice™ Service

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 twelve full months of billing information and 24 months of invoice images*.

*Some exceptions apply. Invoice images are not available to all customers.

Getting Started

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

System
- PC with a 486 (or higher) processor
- 64 megabytes RAM
- Internet connection or high-speed modem

Browser
- Microsoft® Internet Explorer 5.0 (or higher)

OR
- Netscape Navigator® 5.0 (or higher)

The browser you use must support SSL (Secure Sockets Layer) technology.

Access
- PowerInvoice ID
- Password

Once you're set to go:

1. Open your browser and enter the PowerInvoice URL (www.lexisnexis.com/PowerInvoice) in the address field.
2. Enter your PowerInvoice ID and password and click Sign In.

A **Make selections to retrieve reports showing online use, print, and other LexisNexis service charges.**

B **Click to retrieve up to 24 months of invoice images.***

C **Click to change the way your reports are displayed. For example, you can change the default format for downloaded files.**

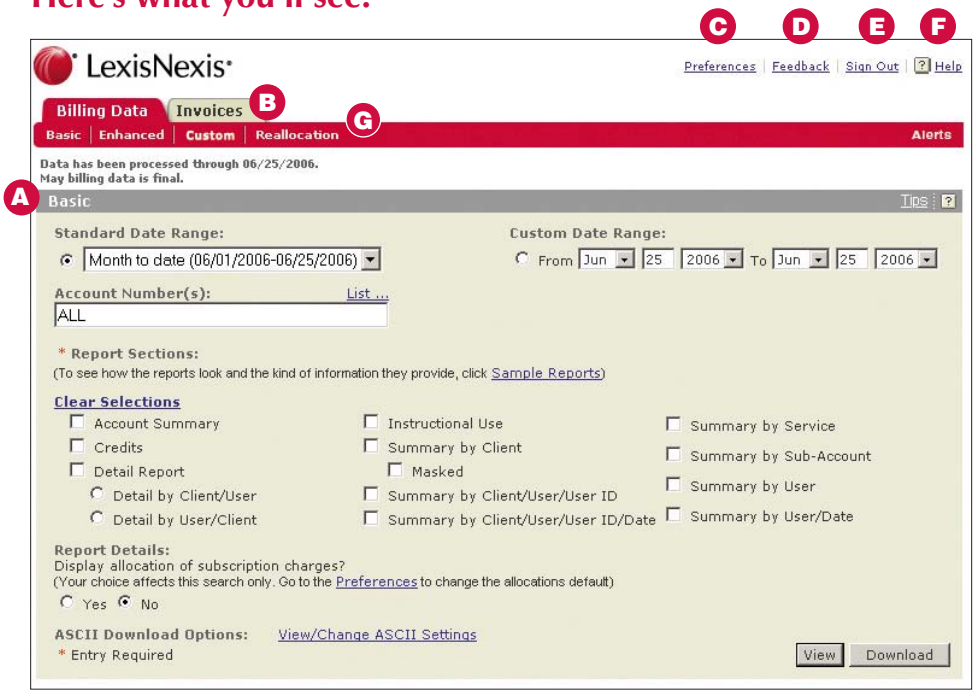
D **Click to send us an e-mail note about the PowerInvoice service.**

E **Click to Sign Out.**

F **Click for complete information about how to use the service.**

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

Here's what you'll see:



Access the PowerInvoice service quickly in the future by selecting the main page as a Favorite or by using a Bookmark (depending on your browser).

Billing Data

The LexisNexis PowerInvoice service gives you instant access to up to twelve 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.

Find billing data

From the Basic Billing Data tab, you can:

A Learn the date through which billing data is available.

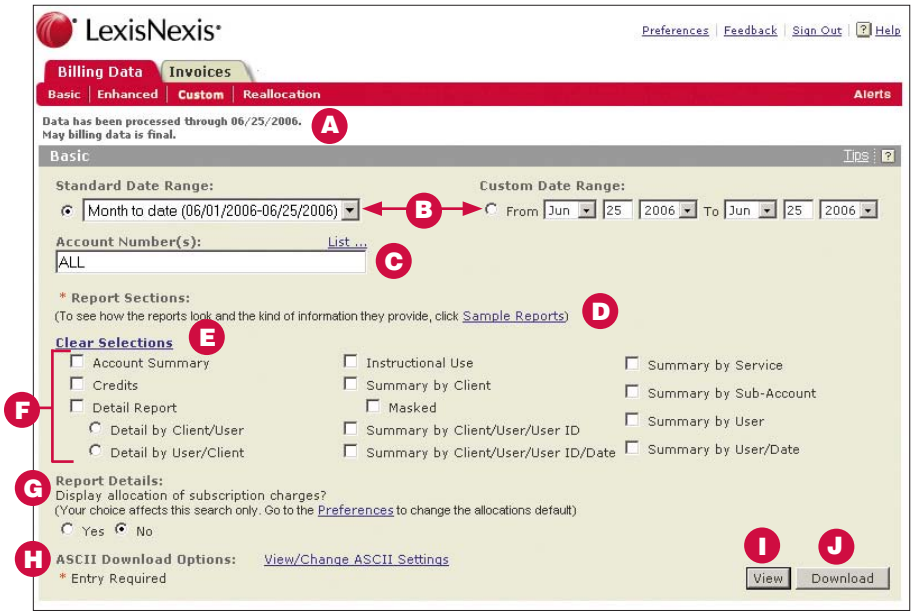
B Click here to find billing data for a specified date range. You can select month to date; a single week in the past few weeks; any complete month within the most recent six months; or a customized date range.

C Click to see a list of possible sub-accounts.

D Click to see how various reports look and what data they provide.

E Click to clear all report sections selected.

F 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, be sure to click "Masked.")



NOTE: Go to the Enhanced Billing Data tab to pinpoint billing data by a specific client ID, user name, type of service or type of charge.

G Choose whether to display allocation of subscription charges.

H Choose download format.

I Once you've made your selections, click to view the reports online.

J Once you've made your selections, click to download the reports.

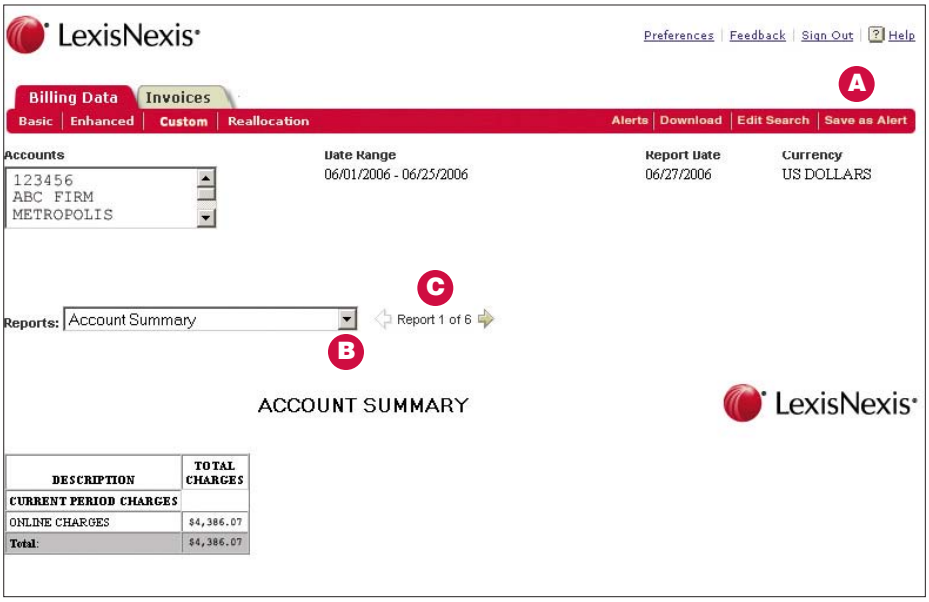
View billing data

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

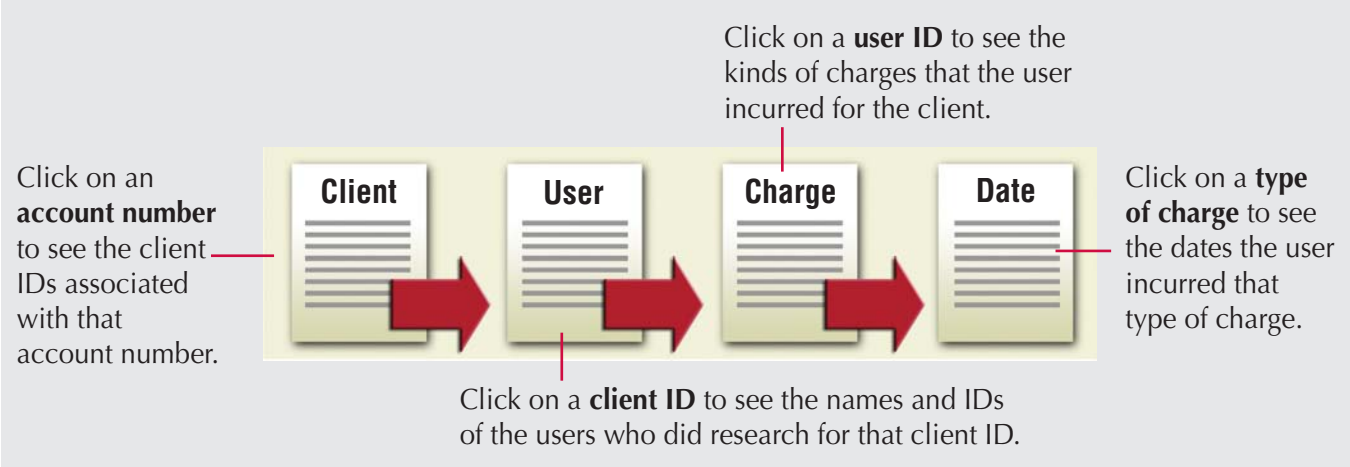
A **Click to save your billing search as an Alert.**

B **Use the drop-down menu to go directly to any report.**

C **Click the forward or back arrow to go directly to the next or previous report.**



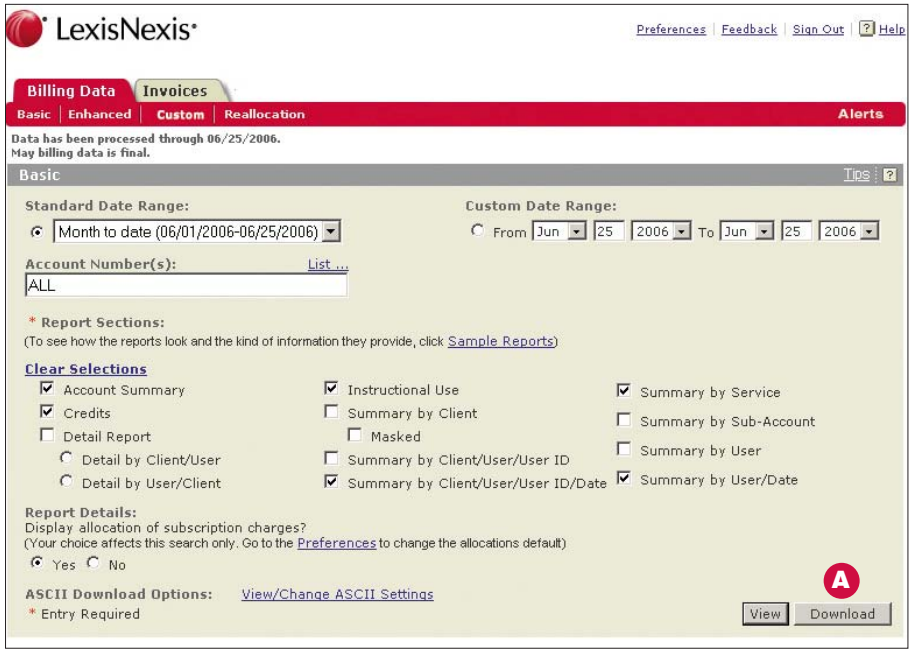
The billing data you retrieve may contain several layers of data. The visual cue that can unfold more detail is the magnifying glass 🔍. This appears in front of any report category with more data. You can move through these layers easily by clicking the magnifying glass.



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:

A Click to proceed with the report download.

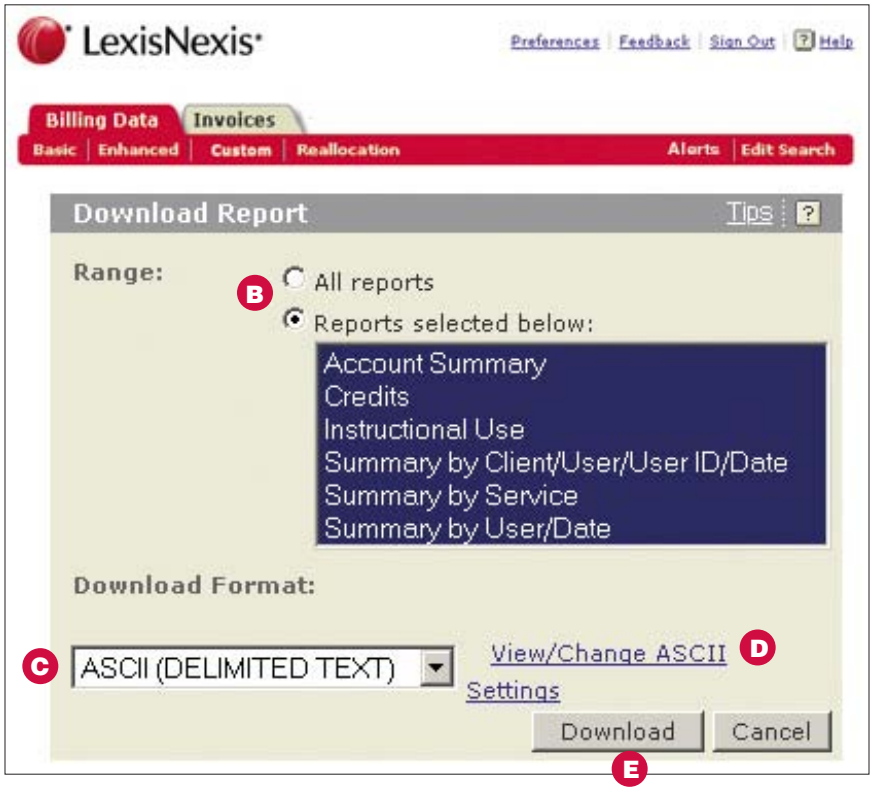


B Select the report(s) you wish to download.

C Select to download format.

D Click to view or change options for ASCII download.

E Click to download.



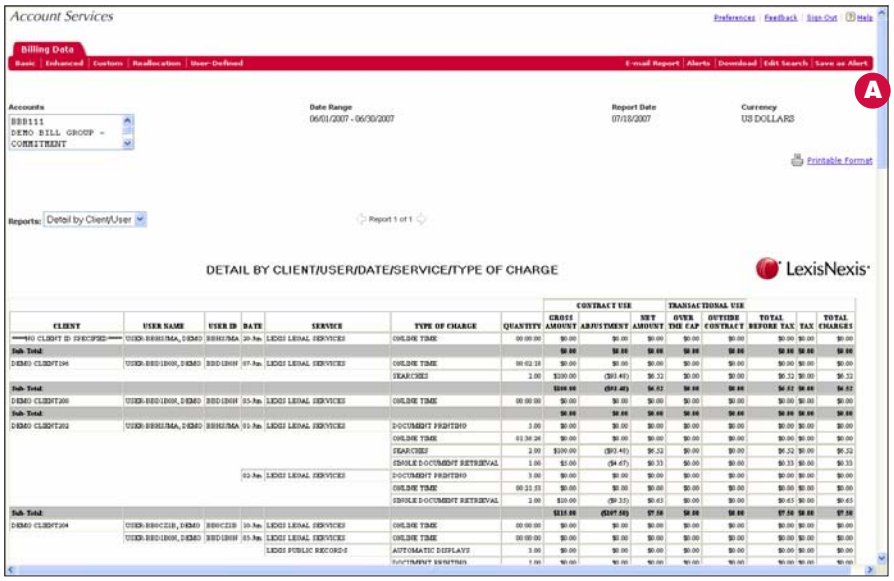
To print billing reports, either download the report first or use the Printable Format feature.

Alerts

Save an Alert

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

A Click here to save the Alert.



B Enter a name for the Alert.

C Select an update frequency for your Alert results.

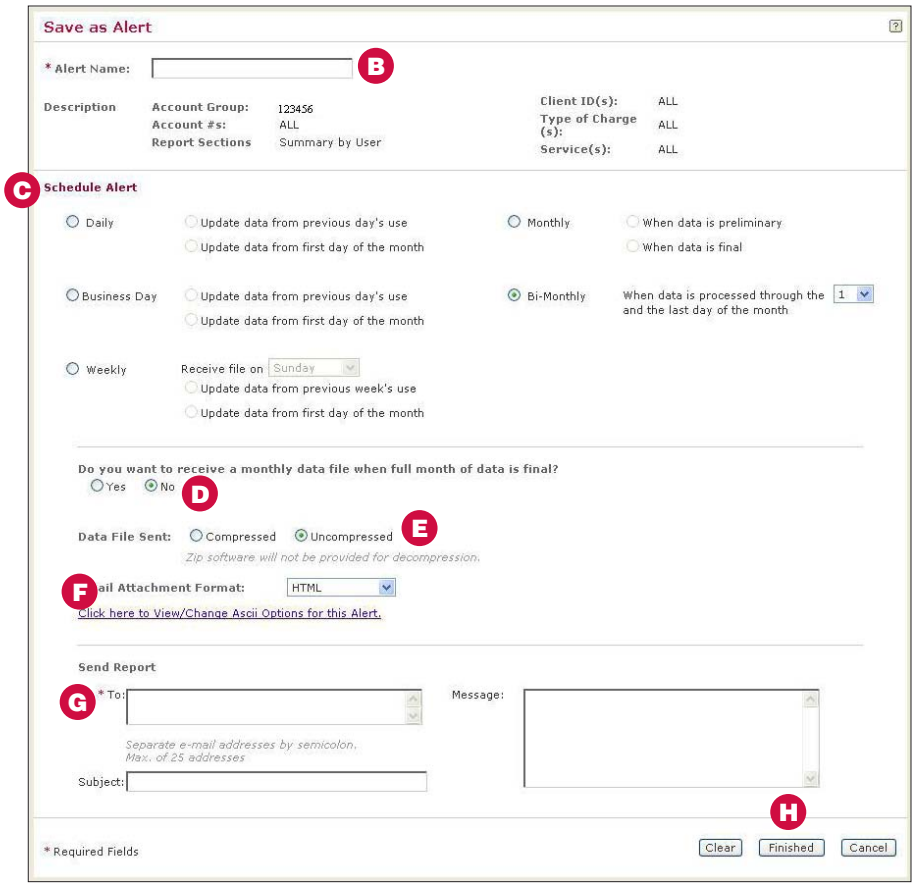
D Indicate if you wish to receive a monthly data file.

E Indicate if you wish to receive the Alert file compressed or uncompressed (no zip software provided).

F Select the e-mail attachment format from the drop-down menu.

G For the report to be sent, enter information in the To, Subject and Message fields.

H Select Clear to reset or erase the form selections or select Cancel to return to the previous screen. Select Finished to save the Alert.



View a saved Alert

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

A Click here to see a list of saved Alerts.

Then click on an Alert Name to view the report settings.

B Alert Name, Status and Frequency are displayed.

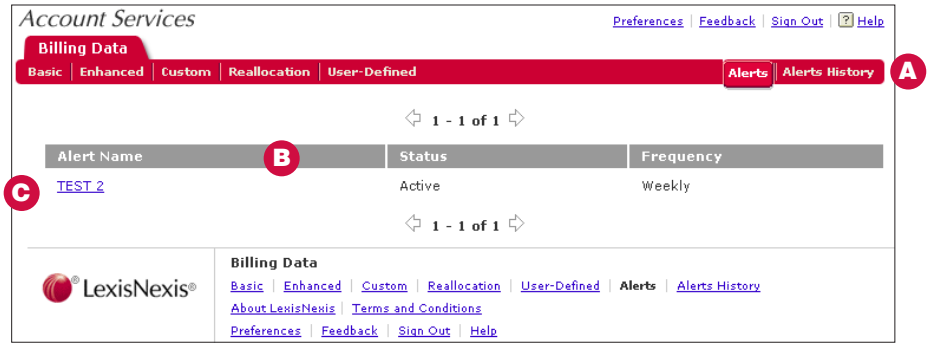
C Select Alert Name to see report settings.

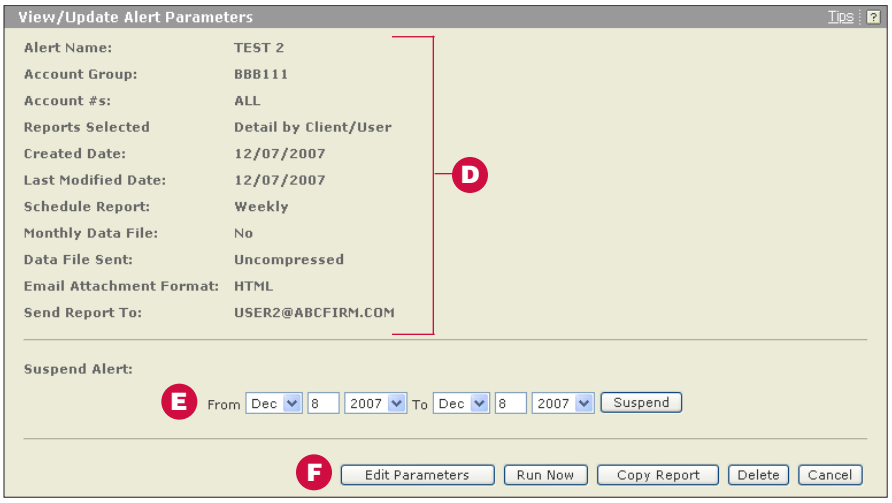
The next screen will display the parameters for the Alert you selected.

D Alert Parameters.

E To suspend an Alert for a specified period, enter a date range and click Suspend.

F Click Edit Parameters to change any of the settings.

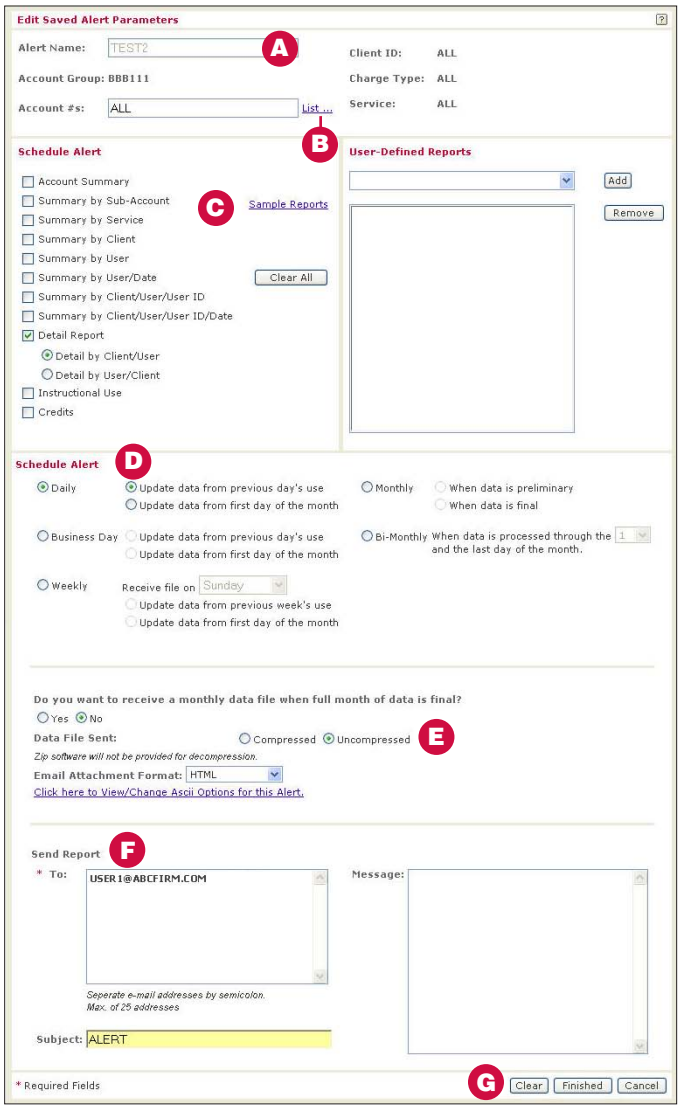




Edit Saved Alert Parameters

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

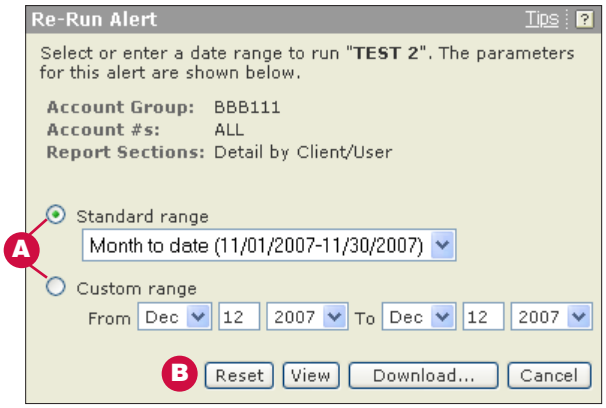
- **A** The name of the Alert you are editing is displayed here.
- **B** Select new account numbers.
- **C** Select a new report.
- **D** Change Alert update frequency.
- **E** Select whether you want to receive the file compressed and specify a download format.
- **F** Change the report's recipients, subject or message.
- **G** Select Clear to reset or erase the form selections or select Cancel to return to the previous screen. Select Finished to save the Alert.



Update Alert Results

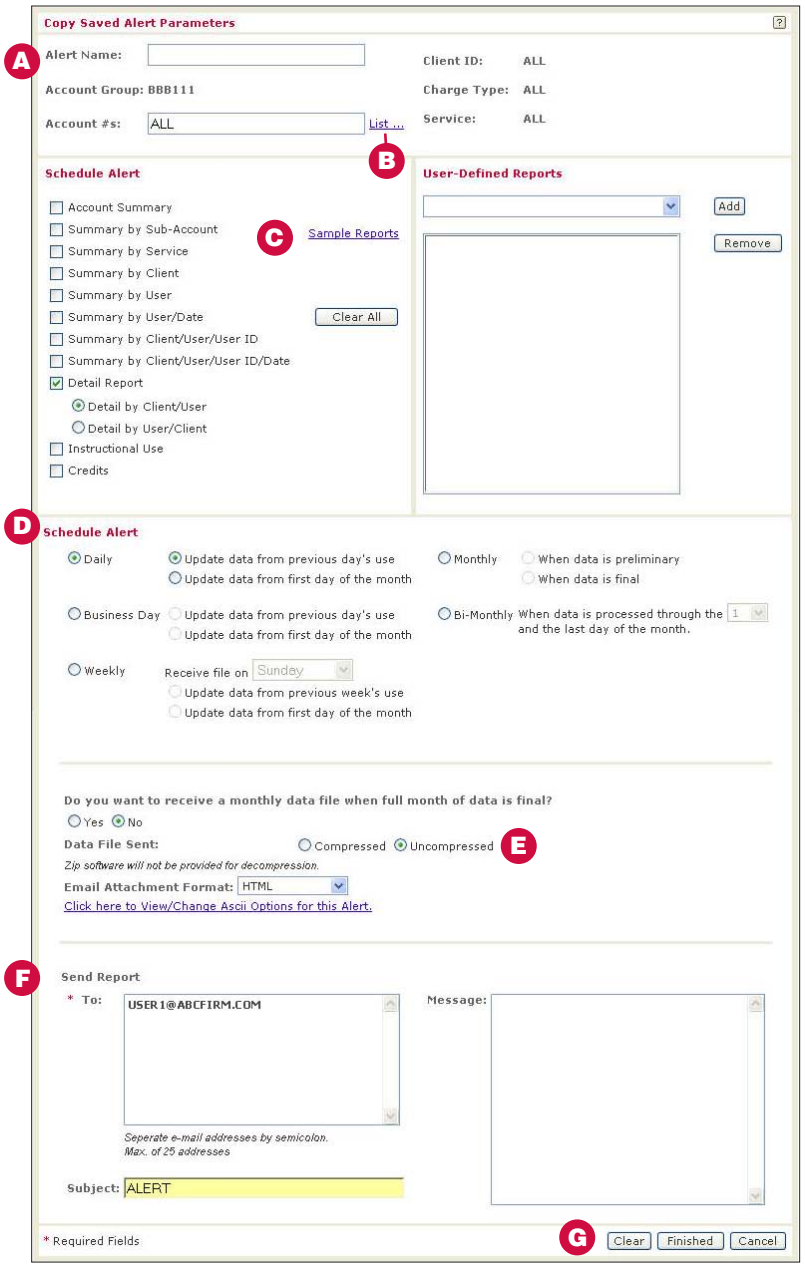
You can choose to update Alert results at any time by selecting "Run Now."

- **A** Select a date range or specify your own date range.
- **B** Make one of the following selections: Click Reset to reset date range selection; click View to view report results; click Download to download report data; or click Cancel to return to the previous screen.



Copy Saved Alert Parameters

- **A** Enter a new name for the Alert.
- **B** Select new account numbers.
- **C** Select a new report.
- **D** Change Alert update frequency.
- **E** Select whether you want to receive the file compressed and specify a download format.
- **F** Change the report's recipients, subject or message.
- **G** Select Clear to reset or erase the form selections or select Cancel to return to the previous screen. Select Finished to save the Alert.



User-Defined Reports

Create your own report format

You have the option of structuring your own report format. A screen similar to the one at right will appear:

A Click Add to create a new user-defined report format.

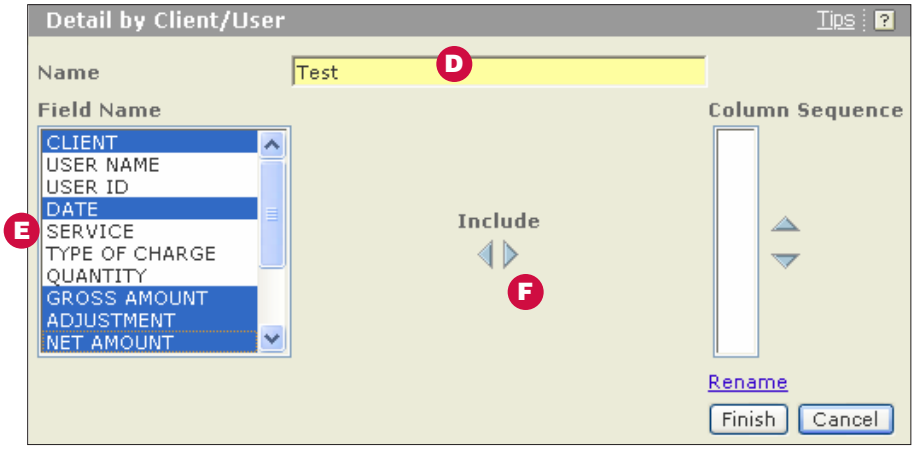
B Select the desired PowerInvoice report.

C Next to continue with creating a user-defined layout or click Cancel to return to the previous screen.

D Provide a name for the user-defined layout.

E Select data columns to include in the layout.

F Click the right or left arrow to add or remove columns in the report.

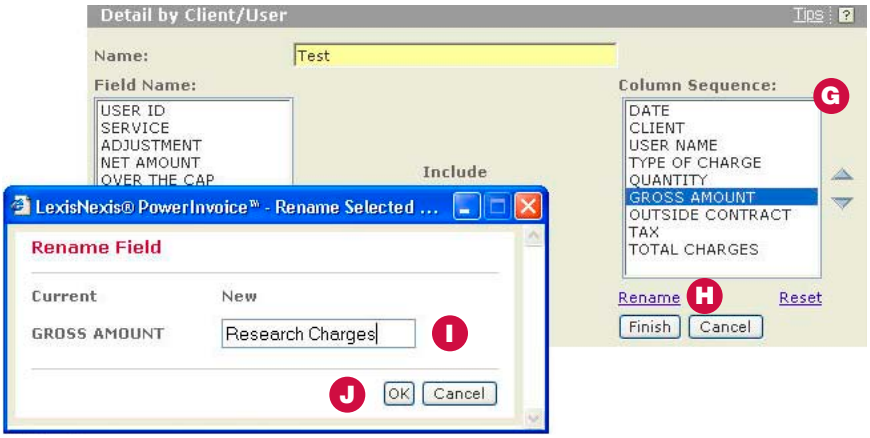


G Highlight the column name; then, click the up or down arrow to set the order of the columns.

H Double-click the field name or click Rename to change the column header.

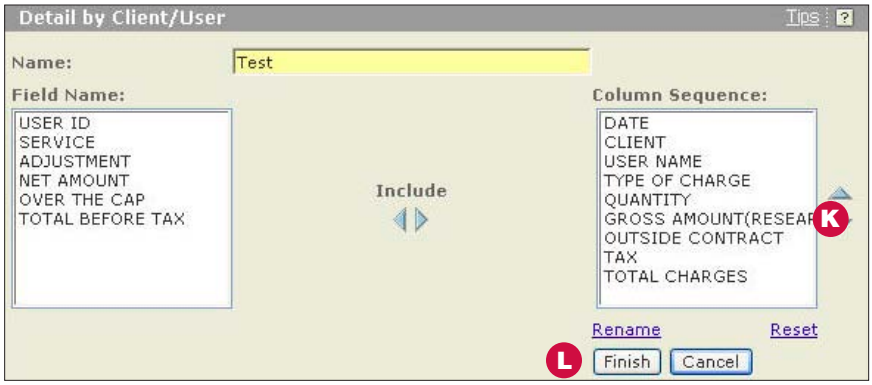
I If you select Rename, enter the new column header name.

J Click OK to save the new header name or click Cancel to return to the previous screen.



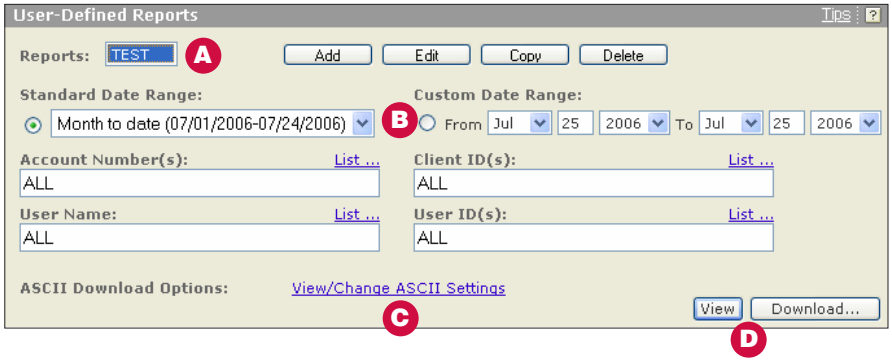
K The new column name appears in parentheses next to the old name.

L Click Finish to complete the task or click Cancel to return to the previous screen.



Viewing or Downloading Information from User-Defined Reports

Select the User-Defined tab to view your reports.



- **A** Highlight the report name that you wish to view.
- **B** Select a date range.
- **C** Click here to view or change ASCII download options.
- **D** Click View to view the user-defined layout or 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 redistribute your research costs across the span of the LexisNexis services 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 services as the report is generated. These adjustment factors let you ...

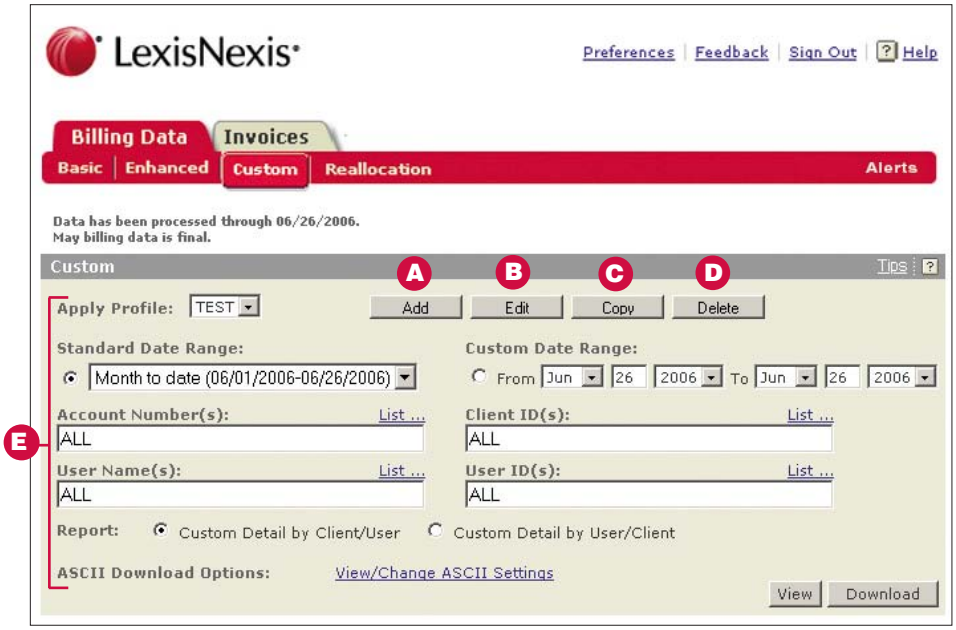
- specify a flat dollar amount to be recovered for each type of billed action performed using a particular LexisNexis service
- specify a percentage rate to be recovered for each type of billed action performed using a particular LexisNexis service
- specify a flat dollar rate only for *Shepard's*®, Auto-Cite® and Table of Authority requests
- rename any LexisNexis service 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 on a service-by-service basis—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.

From here, you can ...

- **A** Add a cost-recovery profile to apply to your billing data.
- **B** Edit an existing profile.
- **C** Make a copy of an existing profile if it's very close to a new profile you need to create.
- **D** Delete an existing profile.
- **E** Apply an existing profile to your billing data.



Create a profile

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

A To create a profile, start by naming it here.

B Choose the method of recovery. Set Rate by Type of Charge lets you assign a fixed amount you wish to recover for any LexisNexis service. Set Percentage Rate by Service lets you assign a proportional amount you wish to recover.

C The Rename Service Description Only 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.

D 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.

E Select a Service Description and click here to rename it. (You can rename a service regardless of whether you choose to set a recovery rate.)

F Click here to reset all service descriptions you've modified.

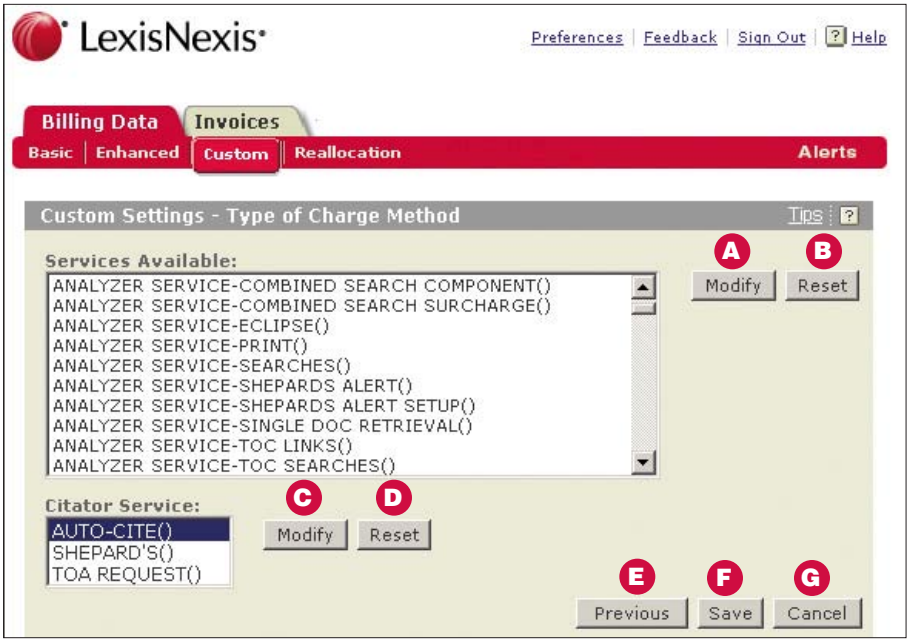
G Click here to continue.

H Click here to cancel.

Set fixed rates

If you've selected Set Rate by Type of Charge, you can …

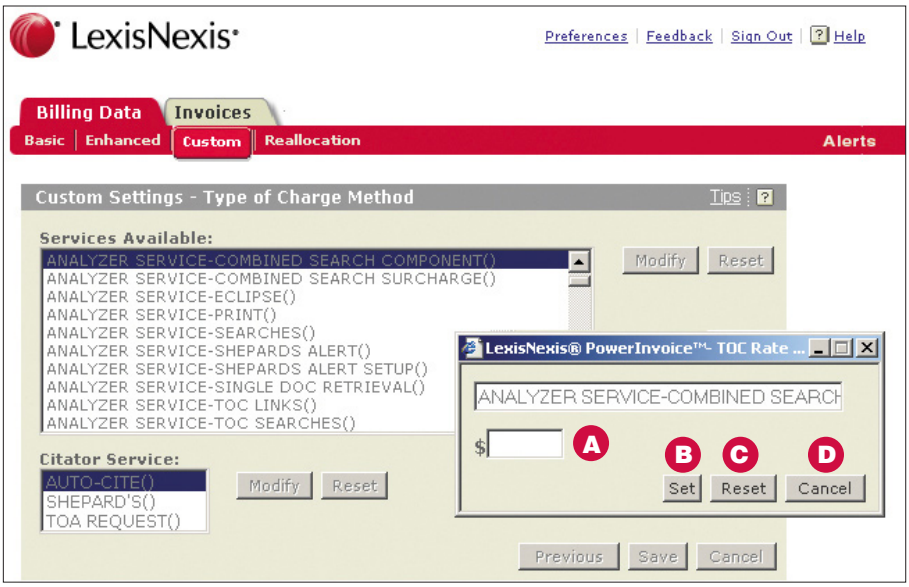
- **A** Select any service to set a fixed rate for cost recovery.
- **B** Highlight any service and click here in order to modify a previously set rate or to reset the rate.
- **C** To set a fixed rate for a citator service, select one and then click Modify.
- **D** Click Reset to remove any previously entered dollar amount.
- **E** Click here to go back to the previous screen.
- **F** Once you have set all desired recovery rates, click here to save your new profile.
- **G** Click here to cancel your profile settings and go back to the main Custom screen.



Once you've selected a service …

- **A** Enter the fixed amount you wish to recover for each occurrence of that service.
- **B** Once you've set an amount, click here.
- **C** Click here to reset the dollar amount field.
- **D** Click here to cancel and go back to the list of Services Available.

For citator services, you may set fixed rates only.

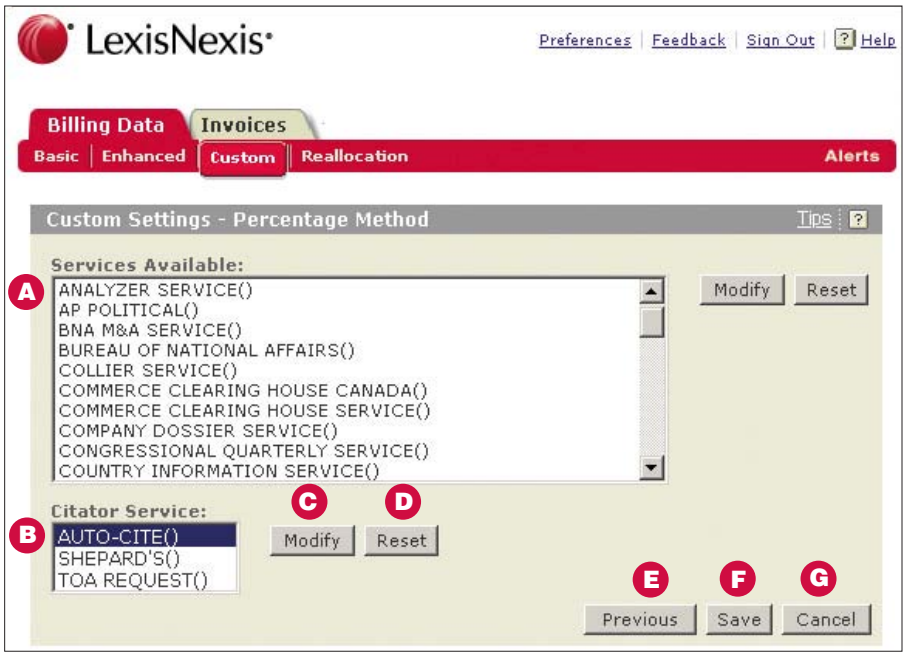


Set percentage rates

If you've selected Set Percentage Rate by Service, you can …

- **A** Select any service to set a proportional rate for cost recovery.*
- **B** Highlight any citator service in order to modify a previously set rate or to reset the rate.
- **C** To set a fixed rate for a citator service, select one and then click Modify.
- **D** Click Reset to remove any previously entered dollar amount.
- **E** Click here to go back to the previous screen.
- **F** Once you have set all desired recovery rates, click here to save your new profile.
- **G** Click here to cancel your profile settings and go back to the main Custom screen.

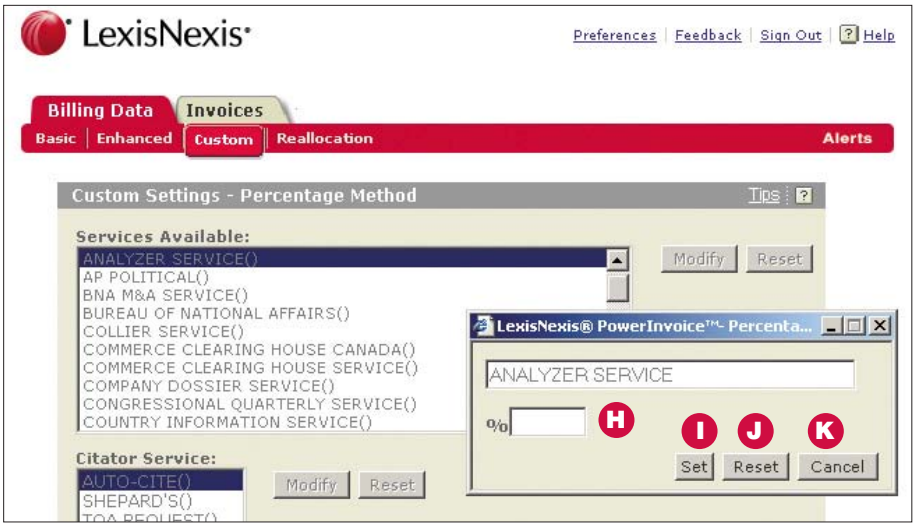
*You may not set percentage rates for recovery of costs for citator services.



Once you've selected a service …

- **H** Enter the percentage rate you wish to recover for each occurrence of that service.
- **I** Once you've set a percentage rate, click here.
- **J** Click here to reset the percentage rate form.
- **K** Click here to cancel and go back to the list of Services Available.

NOTE: 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.



Rename services

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

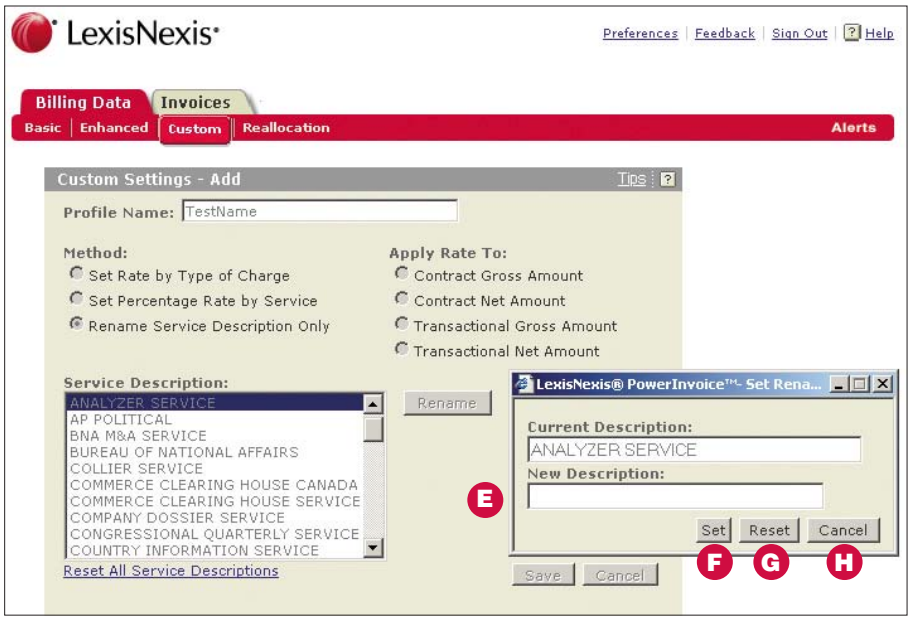
A **Select a service to rename and click here.**

B **If at some point after you've renamed any number of services, you wish to start over, click here.**

C **Once you have renamed all desired services, click here to save them.**

D **Click here to cancel your selections and go back to the main Custom screen.**

Once you've selected a service to rename …



E **Type the New Description here.**

F **Click here to save.**

G **Click here to reset the new service description form.**

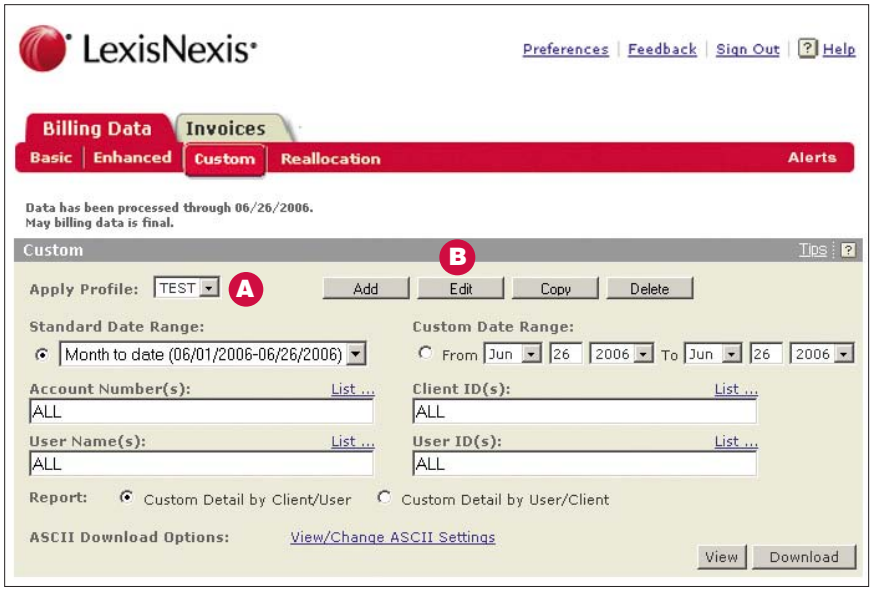
H **Click here to cancel and return to the Custom Settings – Add screen.**

Edit a profile

You can make changes to an existing profile.

A **Select an existing profile.**

B **Click the Edit button.**



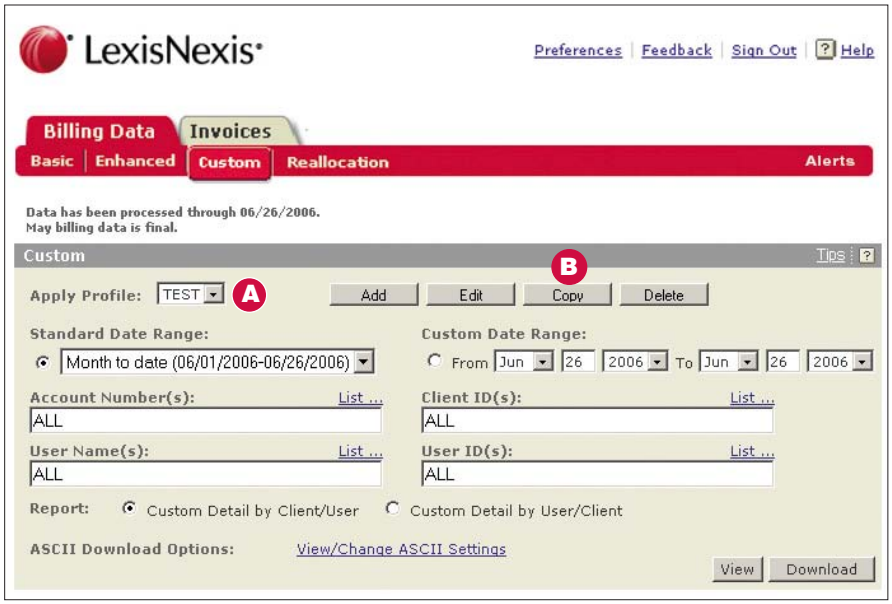
Follow the same steps outlined in the "Create a profile" section on page 13.

Copy a profile

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

A **Select an existing profile.**

B **Click the Copy button.**

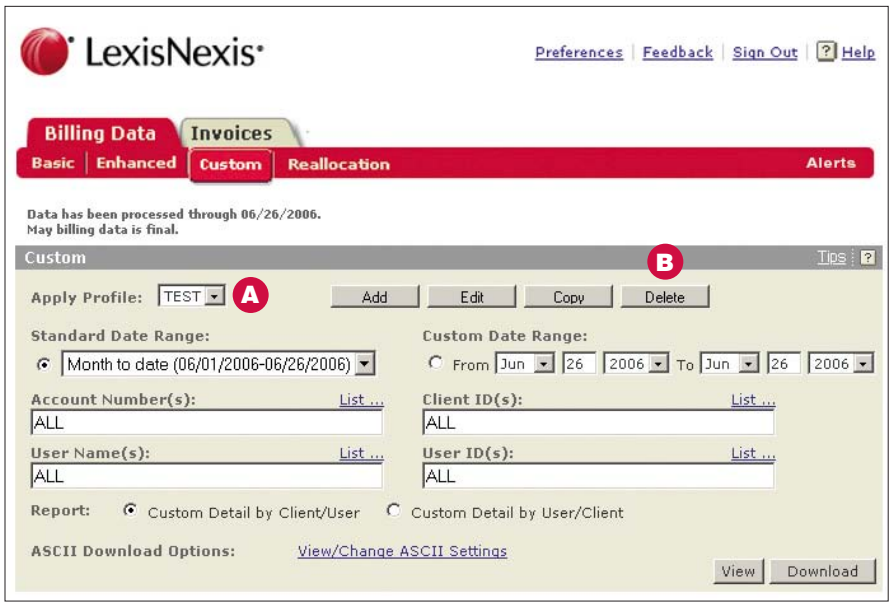


Follow the same steps outlined in the "Create a profile" section, on page 13.

Delete a profile

Should you decide that you don't need a particular profile any longer, it's simple to delete it.

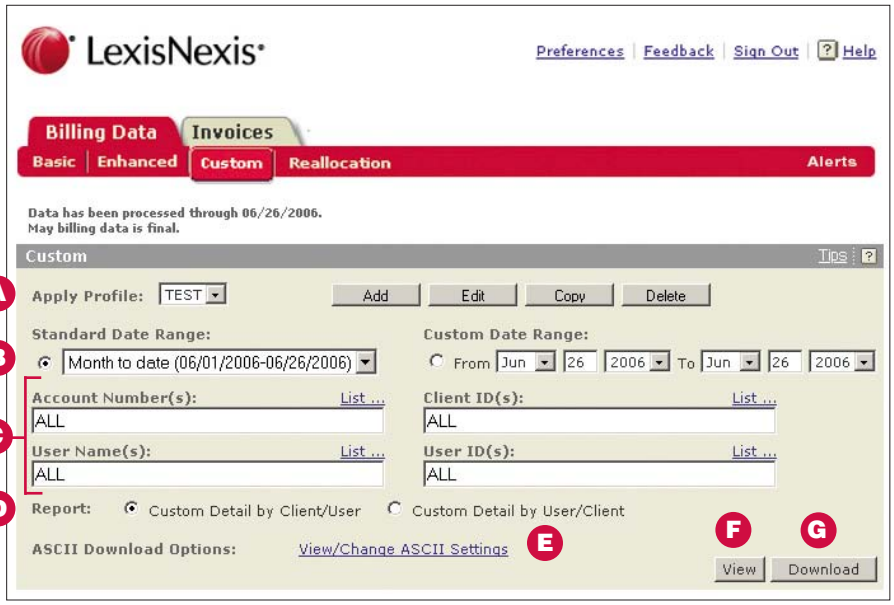
- **A** Select a profile from the list.
- **B** Click Delete.



Apply a profile to billing data

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

- **A** From the list of existing profiles, select the one you wish to apply.
- **B** 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.
- **C** If desired, choose one or more account numbers, client IDs, user names and/or user IDs.
- **D** Select the report to run.
- **E** Click to view or change ASCII settings.
- **F** Once you've made all your selections, click to view your billing data with your selected profile applied.
- **G** Once you've made your selections, click to download your billing data with your selected profile applied.



PowerInvoice™ Reallocation

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

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

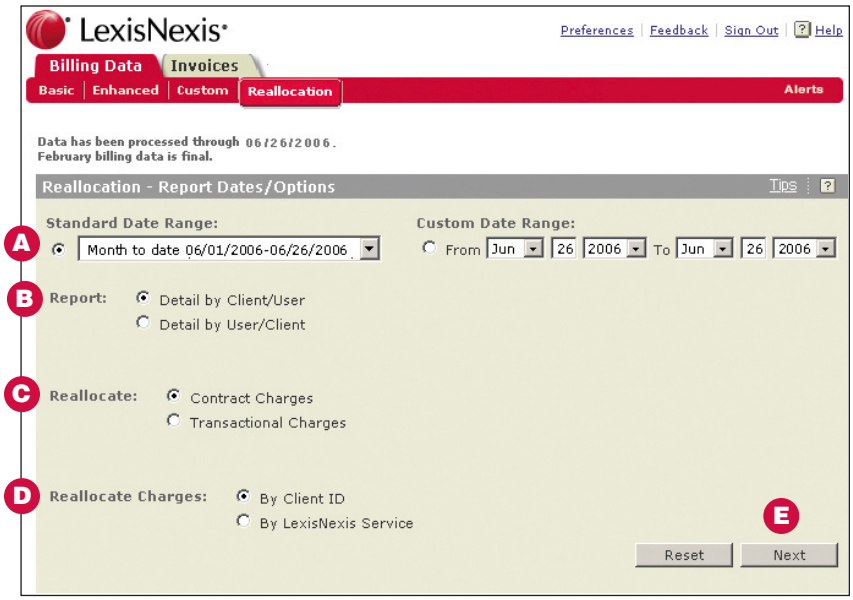
A Choose one of the standard date range options or create your own custom date range.

B Determine how you want the detail report sorted by choosing either the Client/User or User/Client order.

C Choose to reallocate contract charges or transactional charges. (See next page for more information on this topic.)

D Choose to reallocate charges by Client ID or by LexisNexis service. (See next page for more information on this topic.)

E 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.

Reallocate by Client ID or by LexisNexis® services

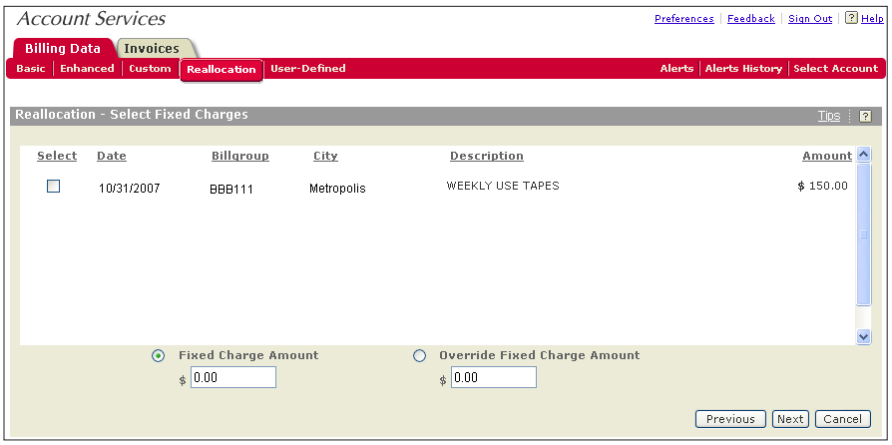
You can also choose whether to reallocate non-billable LexisNexis service charges or non-billable client charges. For example, you may choose to redistribute all Nexis® service charges to the other service charges on your PowerInvoice report, such as Lexis® legal services or *Shepard's*. The other option would be to reallocate non-billable client charges to billable clients. It is not possible to generate *one* report that will redistribute charges for *both* non-billable LexisNexis services and clients.

Reallocating fixed charges (cycle 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:

Examples of the type of Fixed Charges you might see:

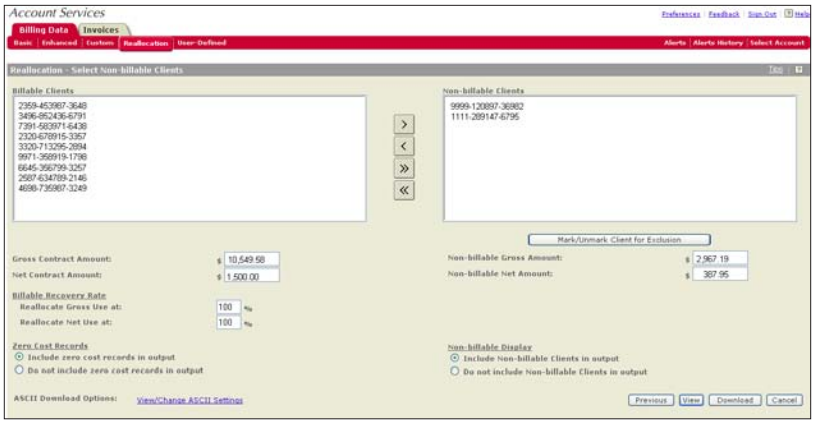
- Administrative Fee
- System Use Surcharge
- LexisNexis Total Search Consulting
- Mail-it Handling Charge
- LexisNexis Cost Recovery Manager
- FullAuthority®
- FullAuthority Maintenance



If you wish to reallocate these fixed charges, select the charge by placing a checkmark 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.

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 service descriptions will appear in the box on the left—Billable Clients. Users 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.

Mark/unmark service/client 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 on the item in the list above and then click on 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.

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 or ASCII 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/SERVICE/TYPE OF CHARGE

LexisNexis

							CONTRACT USE			TRANSACTIONAL USE						
CLIENT	USER NAME	USER ID	DATE	SERVICE	TYPE OF CHARGE	QUANTITY	GROSS AMOUNT	ADJUSTMENT	NET AMOUNT	OVER THE CAP	OUTSIDE CONTRACT	TOTAL BEFORE TAX	TAX	TOTAL CHARGES	REALLOCATED TRANSACTIONAL GROSS AMOUNT	REALLOCATED TRANSACTIONAL NET AMOUNT
000123	SHORE, A	123456C	12-Apr	LEXIS LEGAL SERVICES	SEARCHES	6.00	$558.00	($464.84)	$93.16	$0.00	$0.00	$93.16	$5.36	$98.52	$0.00	$0.00
					SINGLE DOCUMENT RETRIEVAL	1.00	$6.00	($5.00)	$1.00	$0.00	$0.00	$1.00	$0.06	$1.06	$0.00	$0.00
					TOC DOCUMENT LINKS	6.00	$36.00	($29.99)	$6.01	$0.00	$0.00	$6.01	$0.34	$6.35	$0.00	$0.00
Sub-Total:							**$600.00**	**($499.83)**	**$100.17**	**$0.00**	**$0.00**	**$100.17**	**$5.76**	**$105.93**	**$0.00**	**$0.00**
000456	SCHMIDT, S	987654B	07-Apr	LEXIS LEGAL SERVICES	SEARCHES	6.00	$697.00	($580.63)	$116.37	$0.00	$0.00	$116.37	$6.70	$123.07	$0.00	$0.00
			08-Apr	LEXIS LEGAL SERVICES	SEARCHES	13.00	$1,456.00	($1,212.90)	$243.10	$0.00	$0.00	$243.10	$13.97	$257.07	$0.00	$0.00
					SINGLE DOCUMENT RETRIEVAL	3.00	$18.00	($15.00)	$3.00	$0.00	$0.00	$3.00	$0.17	$3.17	$0.00	$0.00
					TOA REQUEST	2.00	$2.00	($1.67)	$0.33	$0.00	$0.00	$0.33	$0.02	$0.35	$0.00	$0.00
				SHEPARD'S SERVICE	LEGAL CITATION SERVICES	2.00	$8.50	($7.08)	$1.42	$0.00	$0.00	$1.42	$0.08	$1.50	$0.00	$0.00
			11-Apr	LEXIS LEGAL SERVICES	SEARCHES	3.00	$315.00	($262.41)	$52.59	$0.00	$0.00	$52.59	$3.02	$55.61	$0.00	$0.00
Sub-Total:							**$3,096.50**	**($2,579.52)**	**$516.98**	**$0.00**	**$0.00**	**$516.98**	**$29.72**	**$546.70**	**$0.00**	**$0.00**
000789	CRANE, D	546372X	06-Apr	LEXIS LEGAL SERVICES	SEARCHES	2.00	$106.00	($88.30)	$17.70	$0.00	$0.00	$17.70	$1.01	$18.71	$0.00	$0.00
					SINGLE DOCUMENT RETRIEVAL	4.00	$24.00	($19.99)	$4.01	$0.00	$0.00	$4.01	$0.23	$4.24	$0.00	$0.00
					TOC DOCUMENT LINKS	1.00	$6.00	($5.00)	$1.00	$0.00	$0.00	$1.00	$0.05	$1.05	$0.00	$0.00

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, prior period credits—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 e-mail alert that your invoice is ready online
- Pay account balances online (please click instructions for registering)

NOTE: If you find any discrepancy between online invoice information and the printed invoice you receive in the mail, the mailed invoice will govern.

Find an invoice

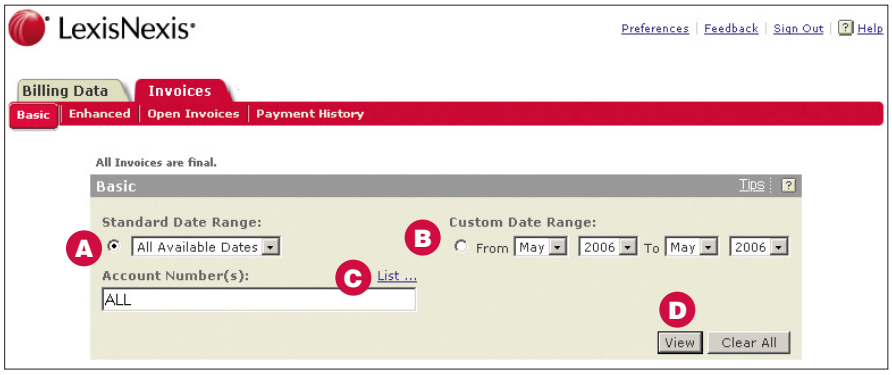
From the Basic Invoices screen, you can:

A **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.**

B **Enter a customized date range.**

C **Click to see a list of possible sub-accounts.**

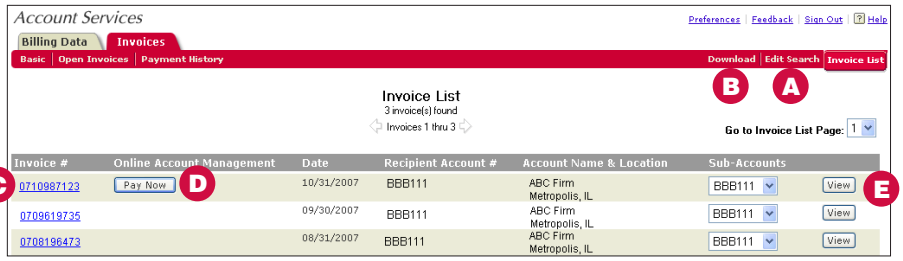
D **Once you've made your selections, click to search.**



NOTE: Go to the Enhanced Invoices screen to investigate an invoice by a specific account number, name, location, client ID, user name or user ID.

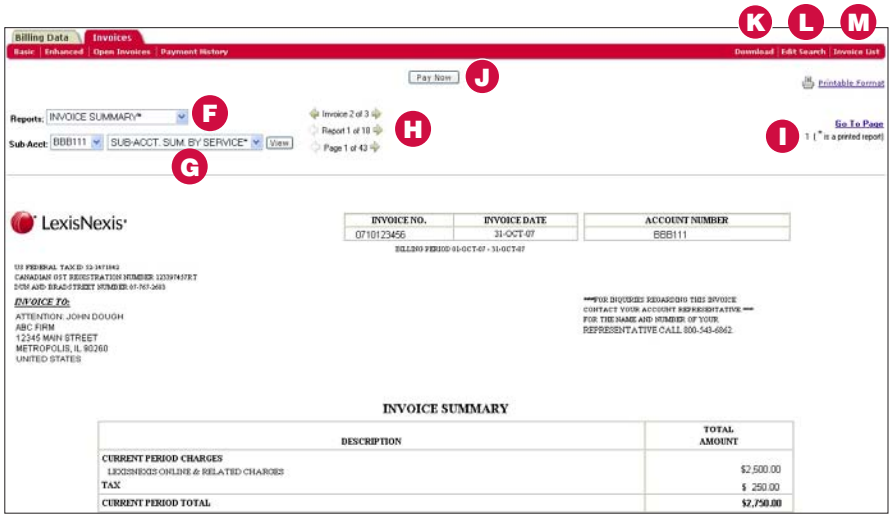
View an invoice

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



- **A** Click to edit your search criteria.
- **B** Click to download an invoice without viewing it.
- **C** Click to go directly to the first page of the invoice.
- **D** Click here to pay the invoice online using a bank fund transfer.
- **E** To see a sub-account report list, select the sub-account you wish to see. Then click View.

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



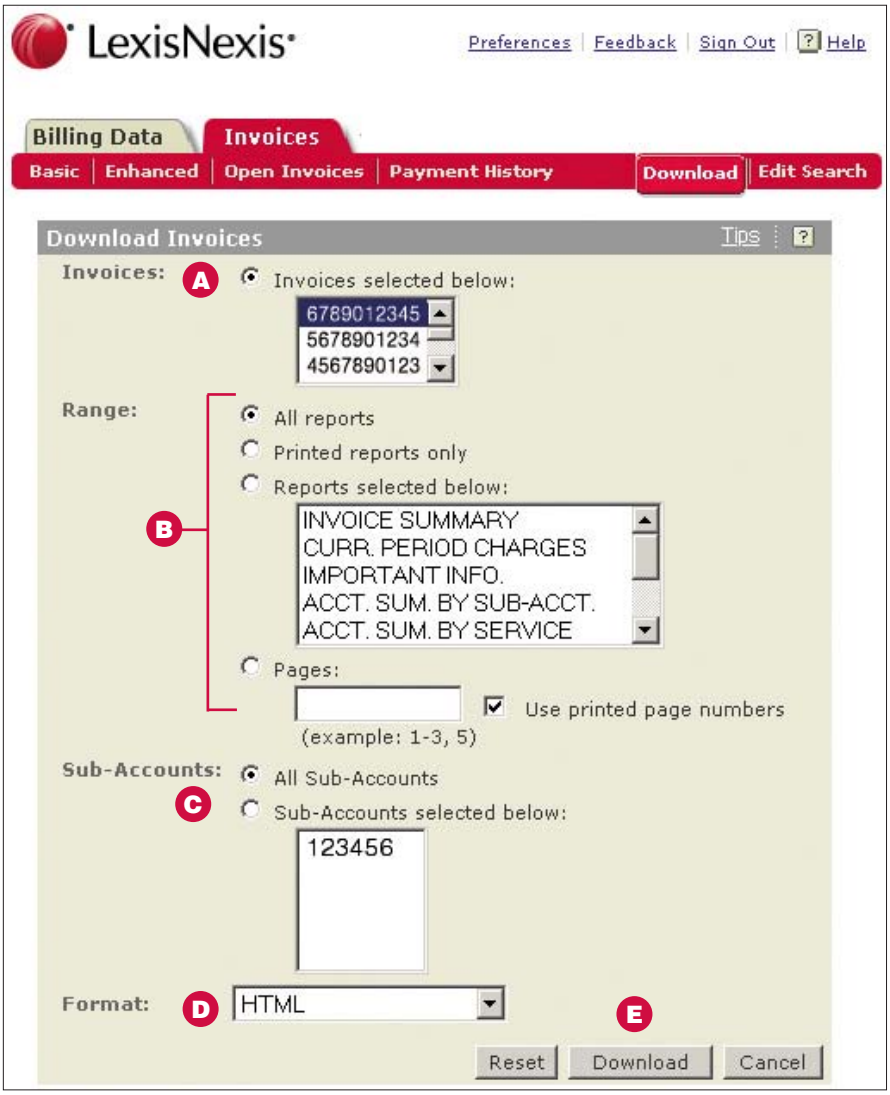
- **F** Go directly to a particular report.
- **G** Move between sub-accounts and go directly to a specific report.
- **H** Click the appropriate arrow to view another invoice, report or page.
- **I** Click to go to a particular page.
- **J** Click here to pay the invoice online using a bank fund transfer.
- **K** Click to download the invoice.
- **L** Click to edit your search.
- **M** Click to go back to the invoice list.

Download an invoice

To download an invoice:

- **A** Select the invoice(s).
- **B** Select specific report(s)/page(s).
- **C** Select the sub-account(s).
- **D** Select download format.
- **E** Once you've made your selections, click to download.

To print an invoice, either download it first or use the Printable Format feature.



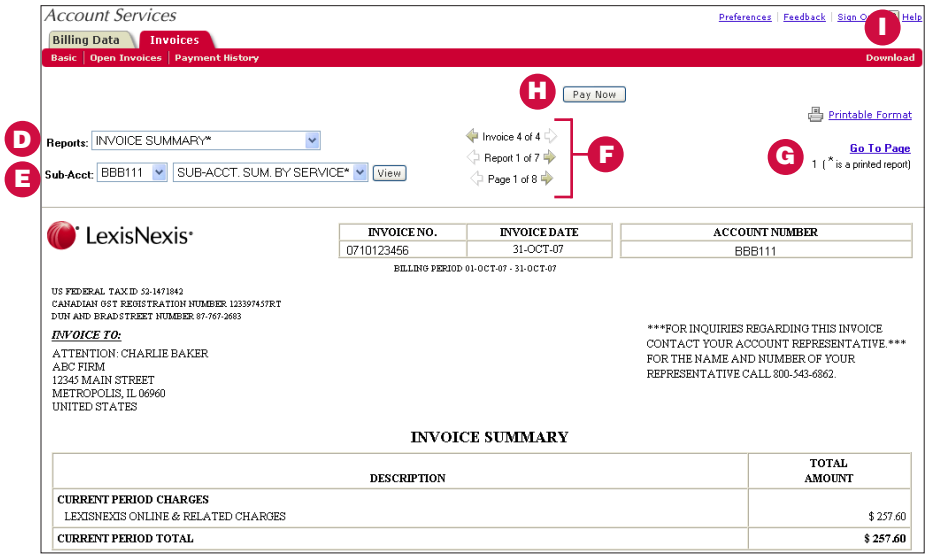
Open invoices

This feature lets you view your current open invoices.

- **A** Click to download the Open Invoices Report in HTML or PDF.
- **B** Click on the invoice number for any invoice listed to view the invoice details.
- **C** Click here to pay the invoice online using a bank fund transfer.

At right is an example of how an invoice may look in the PowerInvoice service.

- **D** Go directly to a particular report.
- **E** Move between sub-accounts and go directly to a specific report.
- **F** Click the appropriate arrow to view another invoice, report or page.
- **G** Click to go to a particular page.
- **H** Click here to pay the invoice online using a bank fund transfer.
- **I** Click to download the invoice.



Payment history

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

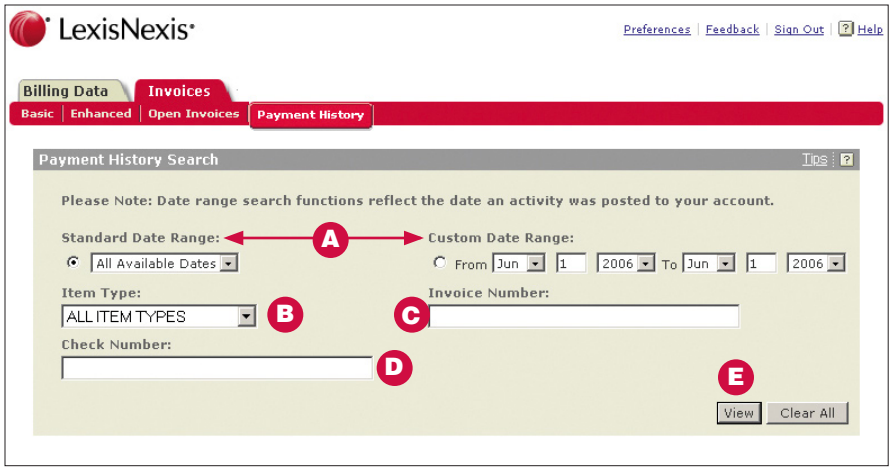
A **Click to search for payment history for a specified date range. You might choose the past 90 days, a particular month or a custom date range.**

B **Click to select the types of payment history items you'd like to view.**

C **If applicable, enter a specific invoice number.**

D **If applicable, enter a specific check number.**

E **Click to view selected payment history.**



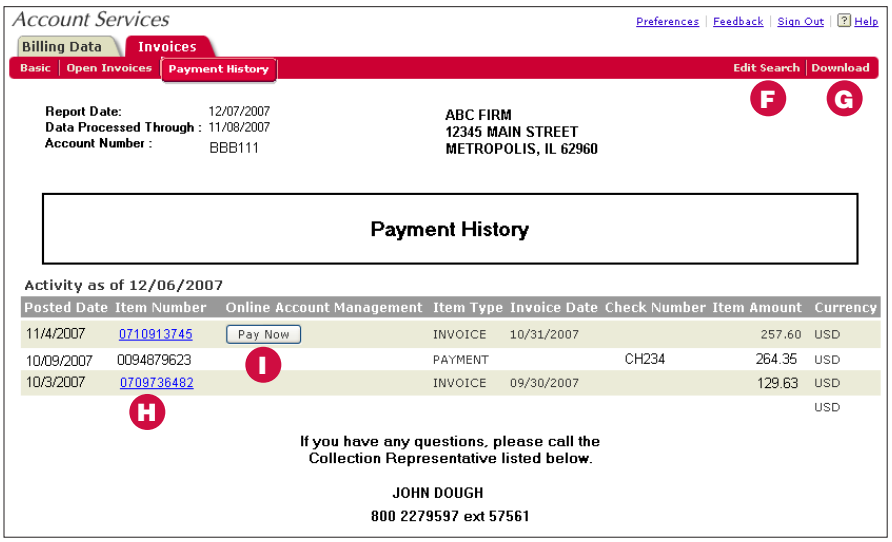
If you choose no search criteria, you will receive all payment history items from the past 24 months.

F **Click to edit your search criteria.**

G **Click to download payment history.**

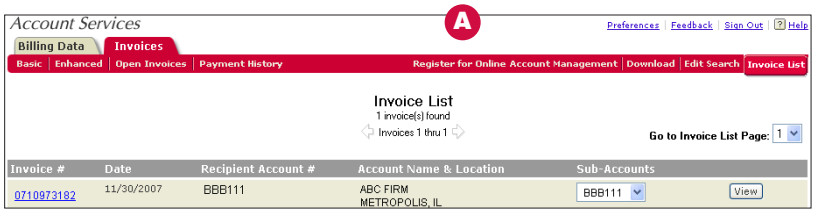
H **Click to view a particular invoice.**

I **Click to pay the invoice online with a bank fund transfer.**



How to Register for Online Account Management

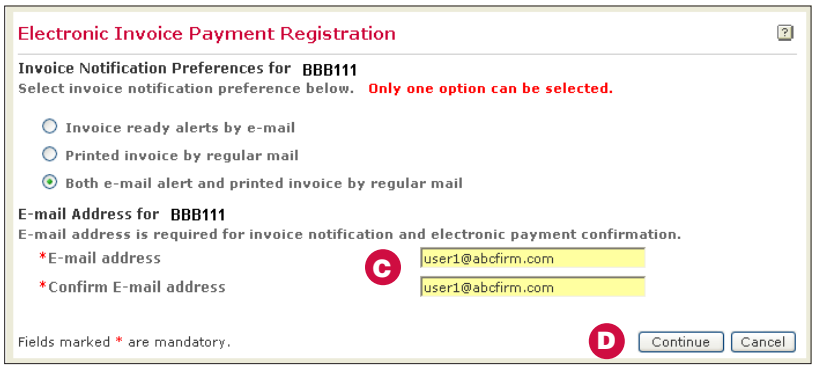
A After completing an invoice search, at the invoice cite list page, click the Register for Online Account Management link.



B Click Continue.

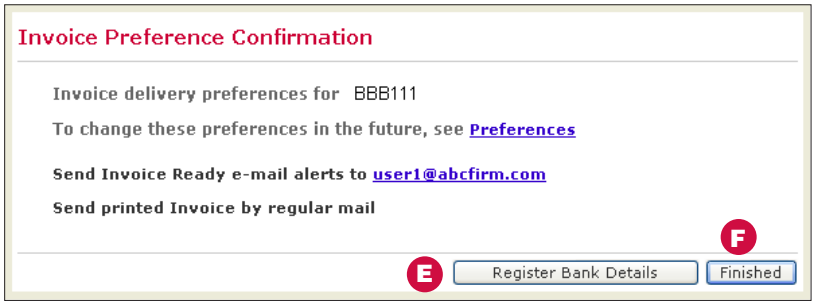
C Enter E-mail information.

D Click Continue to proceed with registration or click Cancel to return to the previous screen.



E Click Register Bank Details.

F Click Finished to receive invoice notification e-mails, but not save bank details.



After clicking Register Bank Details, this screen will display. Enter the necessary bank information.

G **Check Automatically (EFT or ACH) transfer payments from this account to have invoice payments automatically made.**

H **Enter the requested bank information.**

I **Click Finished to continue.**

Bank Payment Registration

Invoice Notification Preferences for BBB111

Upon completion, your banking information will be securely stored by LexisNexis. Registering your banking information will allow you to easily make future online payments. LexisNexis uses industry standard methods to secure your banking information and will only use the information to pay your LexisNexis invoices. To register, please enter the information below.

G ☐ **Automatically (EFT or ACH) transfer payments from this account**

Please enter information exactly as given by bank

H

Bank Name: *	First National
Bank Routing Number: *	12XXX0358
Account Number: *	XXXXXXXXXXXXXXX45
Name on Bank Account: *	ABC law firm
Firm/Person Name: *	user 1
Phone Number: *	937 865 1234

Fields marked * are mandatory. Delete Clear I Finished Cancel

J **A screen will confirm your bank account information. Click Finished to complete the process.**

Online Bank Payment Registration Confirmation

Electronic payment options confirmed for **BBB111**

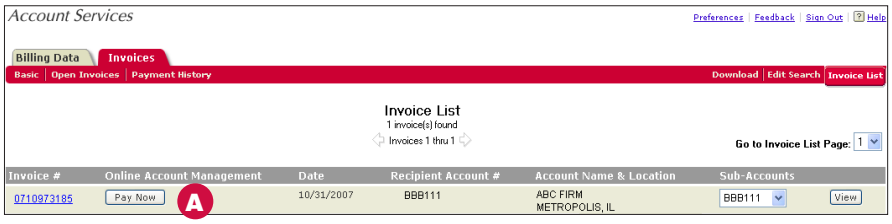
To change these preferences in the future, see **Preferences**

Bank Name	NATIONAL BANK
Bank Routing Number	12XXX0358
Account Number	XXXXXXXXXXXXXXX12
Name on Bank Account	ABC Firm
Firm/Person Name	User 1
Phone number	937- 865- 6800
Automatic payments:	Off

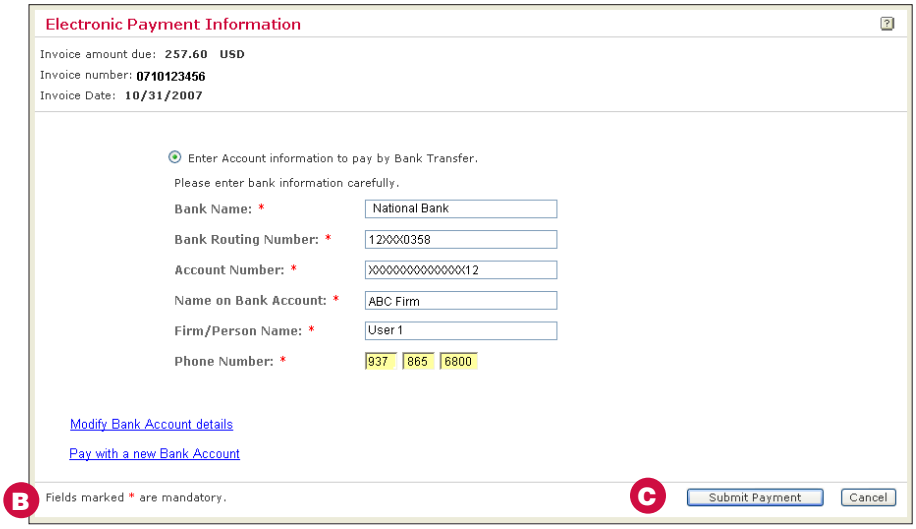
J Finished

Payment

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



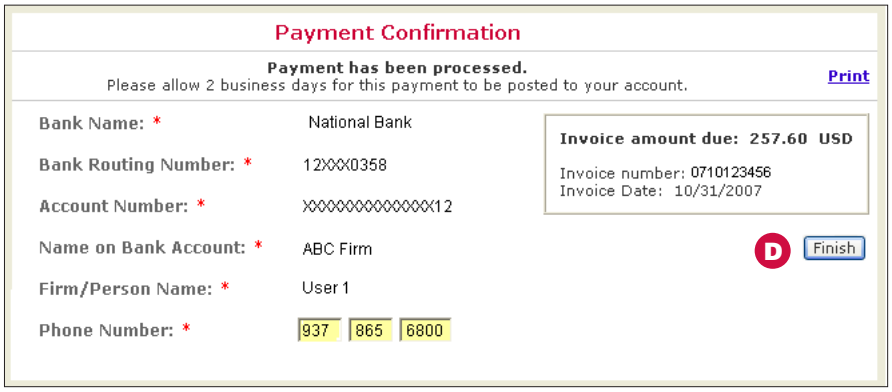
A **Click Pay Now to begin payment process. If auto-payment is selected, clicking the Pay Now button is not required.**



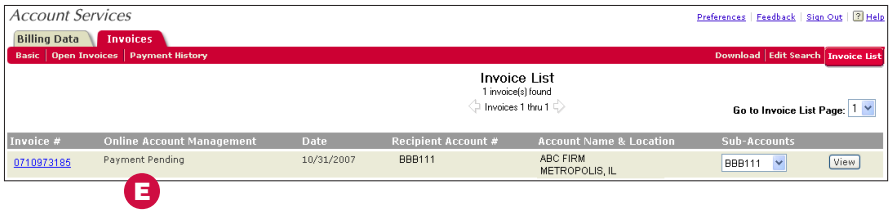
B **Enter information in all fields marked with *.**

C **Click Submit Payment to complete your transaction.**

An e-mail will be sent to the user indicating that the payment is in process.



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



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

E-mail Report and Printable Format

A To send a PowerInvoice report to one or more individuals, click E-mail Report.

B Enter e-mail information, such as e-mail address, subject and a message.

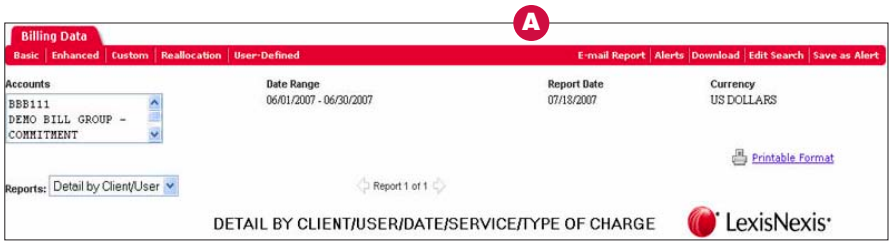
C Select to compress the data file.

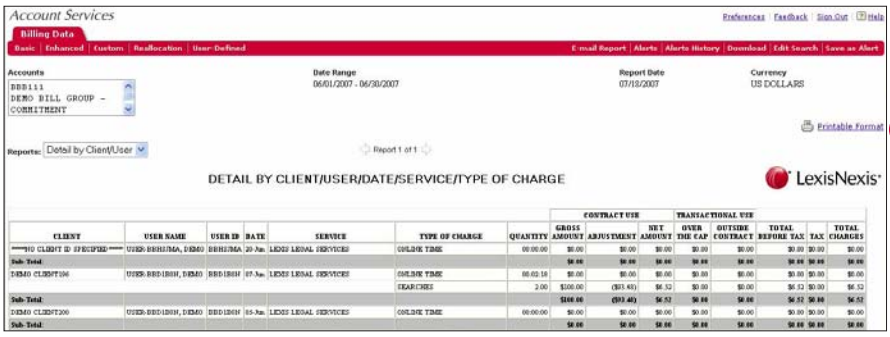
D Select the format in which to send the report.

E Select from the following options: Click Clear to clear the form settings; click Send E-mail to send the report; or, click Cancel to return to the previous screen.

F Click Printable Format to generate a report in a printer-friendly layout.

G At right is a sample print-friendly format of the Billing and Invoice Report.





G

Date Range
11/01/2007 – 11/30/2007

Report Date
12/10/2007

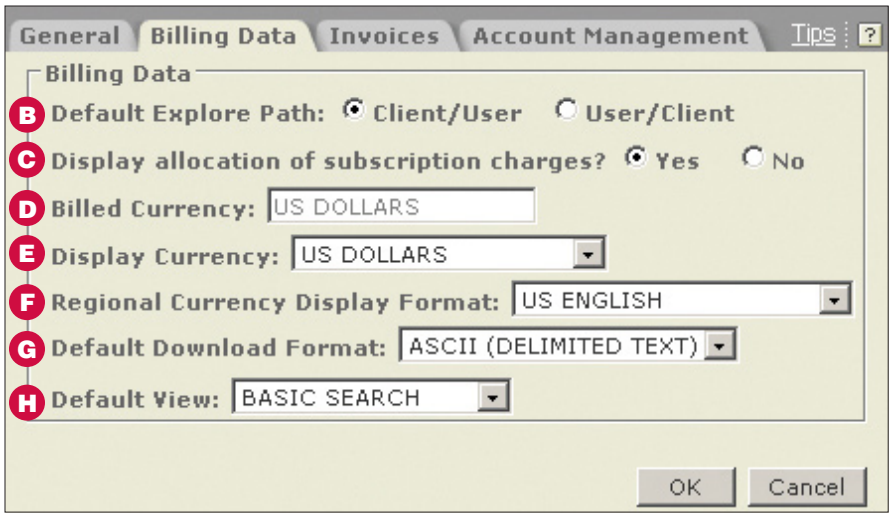
DETAIL BY CLIENT/USER/DATE/SERVICE/TYPE OF CHARGE

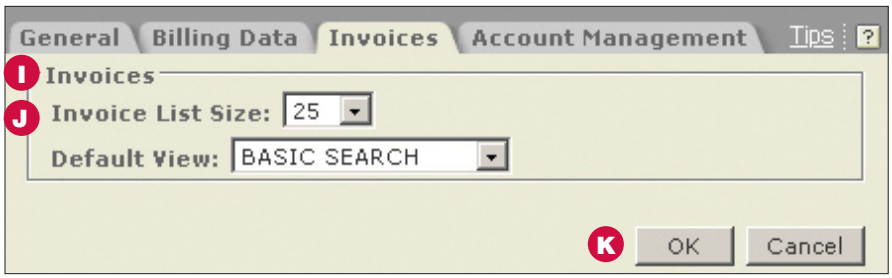
							CONTRACT USE			TRANSACTIONAL USE				
CLIENT	USER NAME	USER ID	DATE	SERVICE	TYPE OF CHARGE	QUANTITY	GROSS AMOUNT	ADJUSTMENT	NET AMOUNT	OVER THE CAP	OUTSIDE CONTRACT	TOTAL BEFORE TAX	TAX	TOTAL CHARGES
****NO CLIENT ID SPECIFIED****	USER-BBHSJMA, DEMO	BBHSJMA	20-Nov	LEXIS LEGAL SERVICES	ONLINE TIME	00:00:00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Sub-Total:							$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
DEMO CLIENT196	USER-BBD1B0N, DEMO	BBD1B0N	07-Nov	LEXIS LEGAL SERVICES	ONLINE TIME	00:02:18	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
					SEARCHES	2.00	$100.00	($93.48)	$6.52	$0.00	$0.00	$6.52	$0.00	$6.52
Sub-Total:							$100.00	($93.48)	$6.52	$0.00	$0.00	$6.52	$0.00	$6.52
DEMO CLIENT200	USER-BBD1B0N, DEMO	BBD1B0N	05-Nov	LEXIS LEGAL SERVICES	ONLINE TIME	00:00:00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Sub-Total:							$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
DEMO CLIENT202	USER-BBHSJMA, DEMO	BBHSJMA	01-Nov	LEXIS LEGAL SERVICES	DOCUMENT PRINTING	5.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
					ONLINE TIME	01:36:26	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
					SEARCHES	2.00	$100.00	($93.48)	$6.52	$0.00	$0.00	$6.52	$0.00	$6.52
					SINGLE DOCUMENT RETRIEVAL	1.00	$5.00	($4.67)	$0.33	$0.00	$0.00	$0.33	$0.00	$0.33
			02-Nov	LEXIS LEGAL SERVICES	DOCUMENT PRINTING	3.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
					ONLINE TIME	00:21:53	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
					SINGLE DOCUMENT RETRIEVAL	2.00	$10.00	($9.35)	$0.65	$0.00	$0.00	$0.65	$0.00	$0.65
Sub-Total:							$115.00	($107.50)	$7.50	$0.00	$0.00	$7.50	$0.00	$7.50
DEMO CLIENT204	USER-BBDCZ1B, DEMO	BBDCZ1B	10-Nov	LEXIS LEGAL SERVICES	ONLINE TIME	00:00:00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
	USER-BBD1B0N, DEMO	BBD1B0N	05-Nov	LEXIS LEGAL SERVICES	ONLINE TIME	00:00:00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
				LEXIS PUBLIC RECORDS	AUTOMATIC DISPLAYS	3.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
					DOCUMENT PRINTING	1.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
					ONLINE TIME	00:07:16	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
					SEARCHES	1.00	$0.00	$0.00	$0.00	$0.00	$50.00	$50.00	$0.00	$50.00
			09-Nov	LEXIS LEGAL SERVICES	DOCUMENT PRINTING	1.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
					ONLINE TIME	00:22:43	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
					SINGLE DOCUMENT RETRIEVAL	4.00	$20.00	($18.70)	$1.30	$0.00	$0.00	$1.30	$0.00	$1.30
			22-Nov	LEXIS LEGAL SERVICES	DOCUMENT PRINTING	3.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
					ONLINE TIME	00:21:54	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
					SINGLE DOCUMENT RETRIEVAL	13.00	$65.00	($60.75)	$4.25	$0.00	$0.00	$4.25	$0.00	$4.25
				SHEPARD'S SERVICE	LEGAL CITATION SERVICES	2.00	$7.50	($7.02)	$0.48	$0.00	$0.00	$0.48	$0.00	$0.48
					ONLINE TIME	00:09:35	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
	USER-BBHSJMA, DEMO	BBHSJMA	05-Nov	LEXIS LEGAL SERVICES	ONLINE TIME	00:14:59	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
					SEARCHES	2.00	$100.00	($93.47)	$6.53	$0.00	$0.00	$6.53	$0.00	$6.53
			10-Nov	LEXIS LEGAL SERVICES	DOCUMENT PRINTING	1.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
					ONLINE TIME	00:50:29	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
					SEARCHES	4.00	$200.00	($186.95)	$13.05	$0.00	$0.00	$13.05	$0.00	$13.05
					SINGLE DOCUMENT RETRIEVAL	3.00	$15.00	($14.01)	$0.99	$0.00	$0.00	$0.99	$0.00	$0.99
				LEXIS PRIVATE DATABASE SERVICE	ONLINE TIME	00:01:05	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00

Preferences

Change default PowerInvoice options by clicking the Preferences button at the top of the screen. Once you get to the Preferences screen, you can:

- **A** Click to change the language you wish to display within the PowerInvoice service (does not apply to the PowerInvoice sign-on screen).
- **B** Choose 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.
- **C** Choose to see an allocation adjustment for commitment pricing charges at the account, client, service and user levels (if you choose No, you'll see gross charges only).
- **D** Shows the currency in which charges are billed to you.
- **E** Select the currency you wish to see displayed in your report.
- **F** Select the format in which you want amounts to display—includes currency symbol, commas, decimal points, etc.
- **G** Choose the download format.
- **H** Choose the page you want displayed when you select the Billing Data tab.
- **I** Choose the number of invoice search results you want displayed in a page, in the Invoices tab.
- **J** Choose which page you want displayed when you select the Invoices tab.
- **K** Click to save your selections.





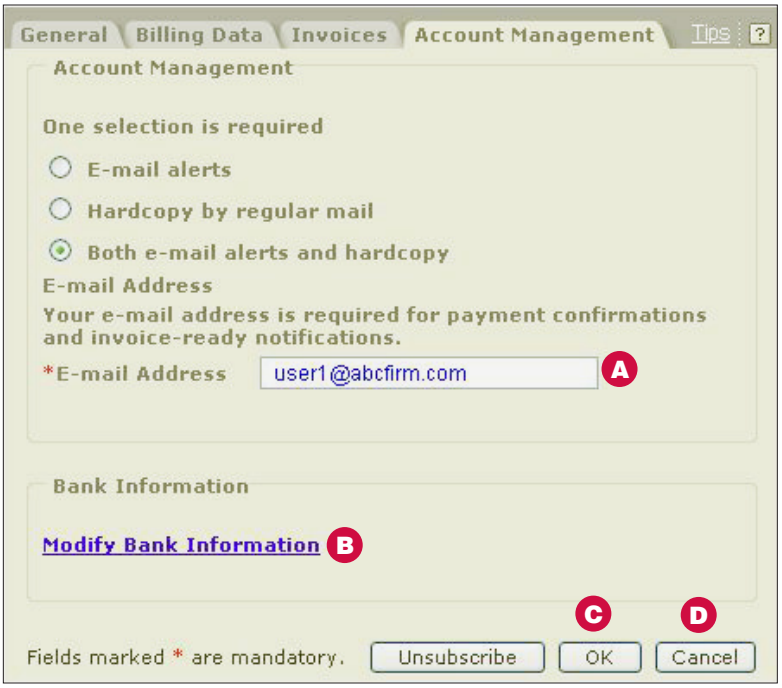
Account Management preferences

A Enter your e-mail address in order to receive invoice-ready notifications or payment confirmations.

B Click to enter or modify bank information in order to pay your invoices online.

C Click to save any changes you've made to your account management options.

D Click to exit the account management form without saving changes.

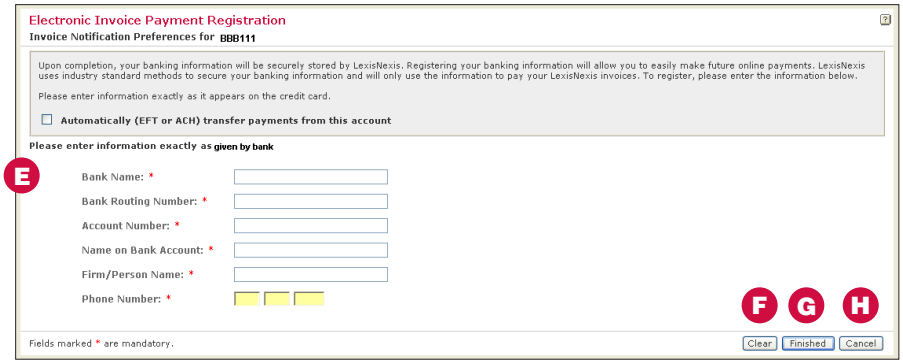


E Enter required bank information in order to pay invoices online.

F Click to clear bank account information entered but not yet saved.

G Click to save information.

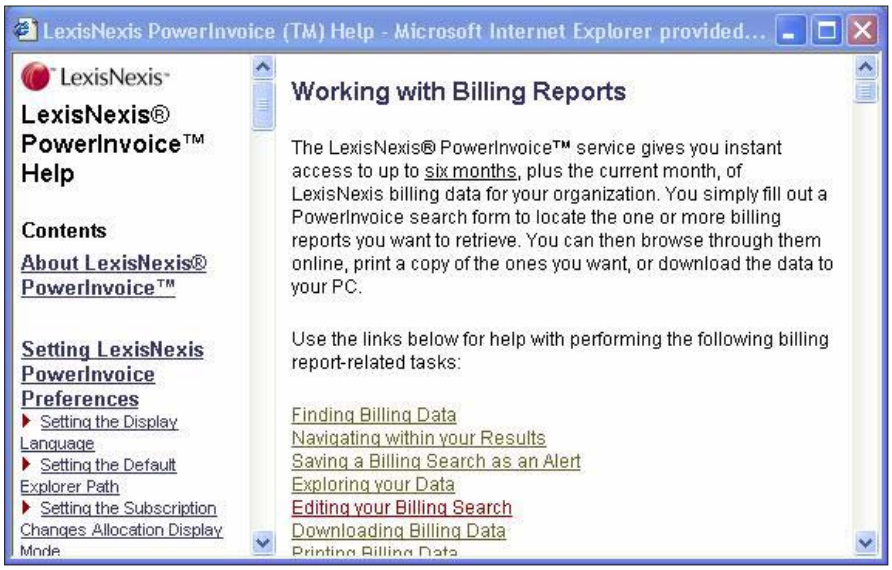
H Click to exit the electronic invoice payment registration forms without saving changes.



Help

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

- Select 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.
- Select the Tips link at the top-right corner of a form for information about that form.
- Select the Feedback link to contact us via e-mail.
- Call **LexisNexis Customer Support** at **1-800-543-6862.**



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