



CounselLink[®]

Law Firm User Guide: Enter \$0 Level Rates



®LexisNexis is a registered trademark of LexisNexis, a division of RELX Group Inc.

No part of this work may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying, recording, or by any information storage or retrieval system, without permission. While the information contained herein is believed to be accurate, this work is provided "as is," without warranty of any kind. The information contained in this work does not constitute, and is not intended as, legal advice.

LexisNexis and the Knowledge Burst logo are registered trademarks of LexisNexis used under license. Other products or services may be trademarks or registered trademarks of their respective companies.

Revised 10/6/2021

Contents

Getting Started with CounselLink	4
CounselLink Process: At-a-Glance.....	4
CounselLink Registration.....	5
<i>Already Registered?</i>	5
<i>New Registration</i>	5
<i>Acknowledge Terms & Conditions</i>	7
<i>Two-Factor Authentication Security</i>	7
Enter Taxpayer ID Number	7
Tax Settings Configuration on Law Office Profile	8
Add Timekeepers	8
<i>Add an Individual Timekeeper</i>	8
<i>Import Timekeepers from Template</i>	9
Timekeeper Rates	10
<i>Client Enters Rates</i>	10
<i>Law Firm Enters Rates</i>	10
Add Discounts to Fee Offer.....	12
Billing Guidelines Acknowledgement	12
Matter Assignments.....	13
<i>Client Configures Automatic Matter Acceptance</i>	13
<i>Accept a Matter Assignment</i>	13
Completing Diversity Information in CounselLink	14
<i>Individual Timekeeper Diversity Information:</i>	14
<i>Law Firm Diversity Survey:</i>	15
Creating an Additional Office.....	16
Invoice Processing.....	17
Preferred Invoice Submission Method	17
<i>Upload a Structured Data (LEDES) File to CounselLink</i>	17
Alternate Invoice Submission Methods.....	18
<i>Email Invoice</i>	18
<i>Mail Paper Invoice</i>	19
<i>Create Invoice in CounselLink</i>	19
Stages of Invoice Review.....	20
Invoice Statuses	21
Adjusting Fees and Rates	21
Search for a Fee Offer	21
Update a Fee Offer.....	22
View the Status of Fee Offers	22
Resolve Rejected or Partially Approved Fee Offers.....	22
Search to Find the Records You Need.....	23
Search Methods	23
<i>Home Page Links</i>	23
<i>Quick Search Bar</i>	23
<i>Search Pages</i>	23
Working with Search Results	24
<i>Navigate the Search Page</i>	24
<i>Keyword Search Tips</i>	24
<i>Use the Filter Panel</i>	25
<i>Configure Search Results</i>	25

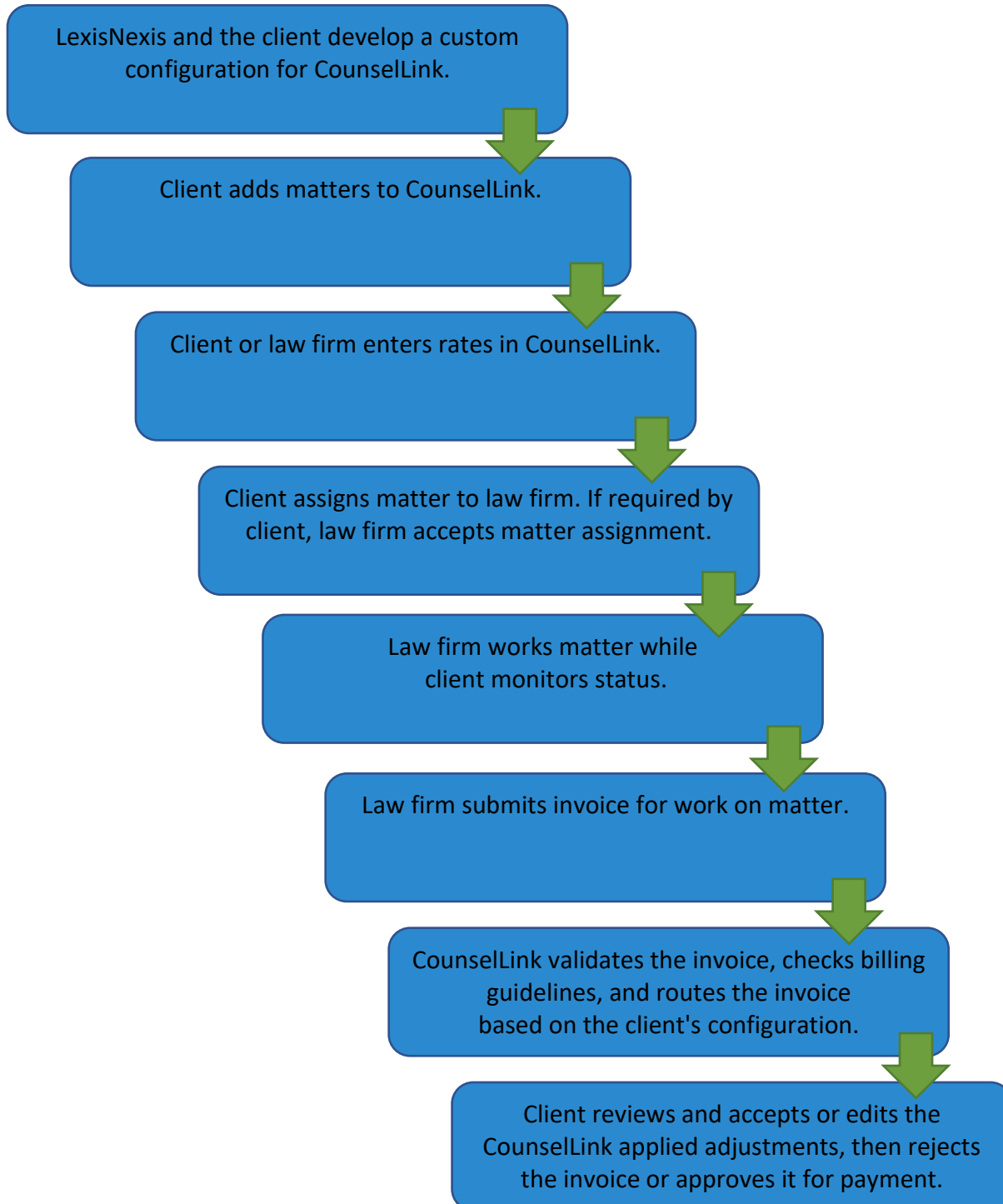
<i>Sort Search Results</i>	25
<i>Complete Actions from the Search Results</i>	26
<i>Print or Export Search Results</i>	26
<i>Save a Search</i>	26
Support Resources	27
Training	27
Attorney Implementation Support	27
Customer Support.....	27
<i>Phone Support</i>	27
<i>Email Support</i>	28

Getting Started with CounselLink

Welcome to CounselLink. This guide contains information to help you register your law firm, configure your office profile and begin submitting invoices to your corporate client. In addition, it contains some tips to help you better understand the invoice review process and work with records in CounselLink.

CounselLink Process: At-a-Glance

Below is the basic CounselLink workflow process between clients and law firms.



CounselLink Registration

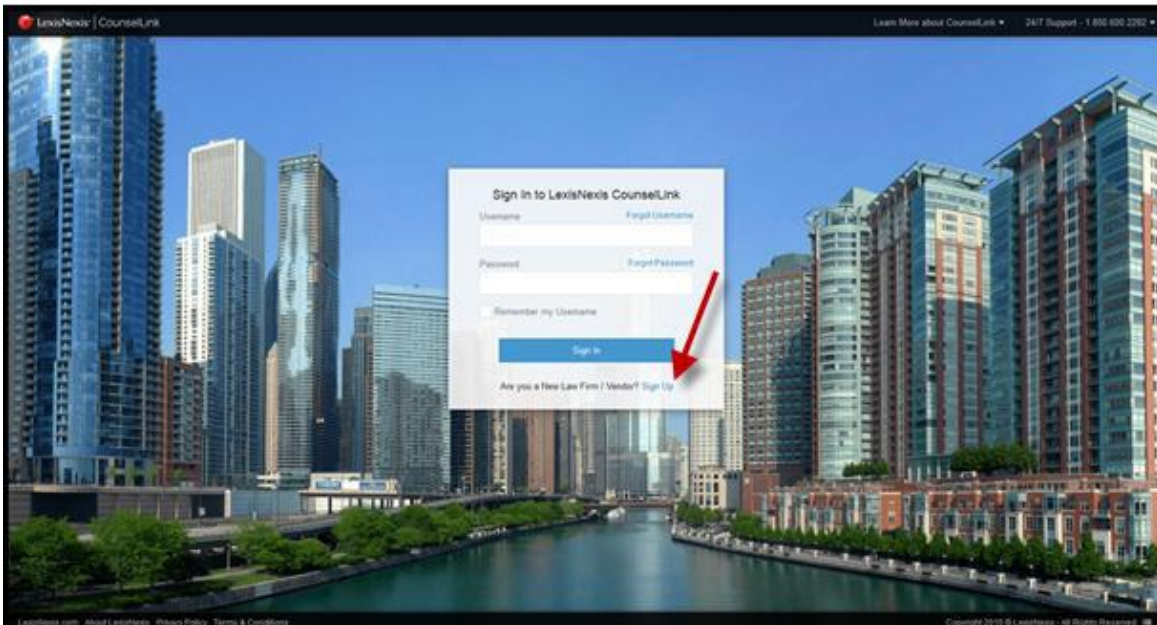
Already Registered?

If you already have a CounselLink account, you do not need to complete the registration process again. Follow your client's instructions for having your account connected to theirs or contact the [Attorney Implementation team](#) for assistance. Once your account is linked to your client's, you can skip to the **Add Timekeepers** section of this guide.

Note: If you have forgotten your username or password, click the applicable **Forgot Username** or **Forgot Password** link and CounselLink will email instructions to assist you.

New Registration

Register your law firm with CounselLink as requested by your client. If you need assistance with the registration process, call the Customer Support phone number that is provided at the bottom of each screen.



1. Go to www.counselink.net and click the **Sign Up** link.
2. Enter your firm's information, including the firm name, firm type, client name, firm address, phone number and payment details. Then click **Next**.
3. Type your **First Name**, **Last Name**, **Email Address**, and **Timekeeper Level** to create your administrator profile. With this role, you can add timekeepers, enter rates and perform other administrative tasks later.
4. Select the box to **Create Username & Password Now**. Enter your login credentials or choose to have CounselLink email you a system generated Username and a link to create a password later. Don't forget to make note of the **Secret Question** you select and the answer you enter, as this must be provided if you need to reset your password later.
5. The first time you sign into CounselLink the Terms & Conditions will display. Please review the CounselLink Privacy Policy and Terms and Conditions, then select the **I agree to the CounselLink Privacy Policy and Terms and Conditions** checkbox
6. Click the **Submit** button. The CounselLink Home page displays.

CounselLink Registration

Registering for CounselLink is an easy step-by-step process. Let's get started with your firm's information.

* Required Fields

Tell us about yourself and your client

Firm Name *

Firm Type *

Client Name *

Where is your firm located?

Country *

Street Address *

Street Address, Building, Apt., Floor, Suite, etc.

City *

State * (US Only) Zip/Postal Code *

Telephone * Extension (Optional)

Fax (Optional)

Remit payment to a different address

Payment Details

Preferred Currency * Taxpayer ID (Optional)

Need Help?

United States	1.800.600.2282
International	+1.919.378.2713

Add Law Firm Information page

CounselLink Registration - Step 2

By creating your CounselLink profile now you will be given administrator privileges allowing you to configure CounselLink and create other users.

Create your CounselLink Profile

* Required Fields

First Name *

Last Name *

Email Address *

Timekeeper Level (Optional)

Create Username & Password Now

Need Help?

United States	1.800.600.2282
International	+1.919.378.2713

Create Admin User Profile page

Acknowledge Terms & Conditions

The first time you log on to CounselLink the Terms & Conditions will display. Please review, click **'I Agree'** to the CounselLink Terms & Conditions of use box. You will now be on the CounselLink HOME page.

Home Matters Invoices Fees Calendar Profiles Info Center

Terms & Conditions

The CounselLink Terms and Conditions Policy is required to be accepted before CounselLink can be accessed and/or used. If you have questions or need further clarification, contact customer support.

LexisNexis, a division of Reed Elsevier Inc. ("LexisNexis") provides collaborative tools and technology for dynamic outside counsel management. LexisNexis provides the CounselLink legal spend and matter management solution, the Legal Precision eBilling application and related technology tools (collectively, the "Services"), and the counselLink.net website (this "Site") to you subject to the following Terms and Conditions (these, "Terms") and the LexisNexis Privacy Policy. By clicking on "I Accept" at the time of registration for the Services, you agree to be bound by and abide by these Terms. If you do not agree with any of these Terms, do not use this Site. LexisNexis may change these Terms periodically for changes. Your use of the Services or the Site after any such change indicates your acceptance of these Terms, along with such changes, including any additions or deletions. Notwithstanding the foregoing, if you are a member of a corporate legal department and your department and LexisNexis are parties to a definitive written subscription agreement pursuant to which you obtain access to these Services, the terms of your agreement will govern your use of the Services.

Registration and Passwords

You agree to provide current, complete and accurate information as prompted by the registration form for the Services. You also agree to promptly update such information in order for it to remain current, complete and accurate. If you provide any information that is untrue, incomplete or inaccurate, or LexisNexis has a reasonable basis for suspecting that such information is untrue, incomplete or inaccurate, LexisNexis reserves the right to suspend or terminate your account and to refuse any and all use of the Services. Each registration for the Services is for a single user (each, a "User") only. Certain authorized Users within each subscribing organization will be issued a User ID and Password, allowing them to access and use the Services upon payment of the registration or other required fee, if any. Each customer is solely responsible for maintaining the confidentiality of all access codes issued to Users within its organization. Any password issued to a User is not transferable. LexisNexis does not permit any other person to use the Services under another User ID, or access the Services or the Site through a single name being available to multiple users on a network. You acknowledge and agree that you will notify LexisNexis immediately if you become aware of any loss or theft or unauthorized user of your User ID and/or password, and that you are responsible for all data entered through or under your User ID and password. LexisNexis will act as though any data submitted under your User ID and password is submitted by you. You may not use any device, software or practice to interfere or attempt to interfere with the proper working of the Site.

No Attorney-Client Relationship Created; No Legal Advice

Neither your receipt of information from this Site, nor use access or use of this Site creates an attorney-client relationship between you and LexisNexis. LexisNexis does not provide, refer or offer professional legal advice, counsel or services. No legal, financial or tax advice or counsel is, shall be deemed to have been given, nor is any attorney-client relationship formed, by the Services or the Site. Data that you submit to the Services may be confidential in nature and may be subject to the attorney-client privilege.

Security of Data Transmission

You are responsible for configuring your information technology, computer programs and platform in order to access our Website. We recommend that you use virus protection software. You agree to use software produced by third parties, including, but not limited to, browser software that supports a data security protocol compatible with the protocol used by the Services. Until LexisNexis otherwise notifies you, you agree to use software that supports the Secure Socket Layer (SSL) protocol or other protocols accepted by the Services and to follow LexisNexis login procedures for Services that support such protocols. You acknowledge and agree that LexisNexis is not responsible for notifying you of any upgrades, fixes or enhancements to any such software or for any compromise of data transmitted across computer networks or telecommunications facilities, including, but not limited to, the Internet. You further acknowledge and agree that it is possible that data may be accessed by unauthorized third parties when communicated between you and the Services using the Internet, other network communications facilities, telephone or any other electronic means.

Prohibited Uses

By registering with and using the Site, you agree that you may use the Site and the Services solely for business purposes. You may not upload, publish to the Site or distribute in any way any content or files that contain viruses, worms, corrupted files or any similar technology that may damage the operation of hardware, software, the Services or the Site, or may contribute to hacking or creating a security vulnerability. You agree not to interfere with or disrupt networks connected to the Services or Site. You are prohibited from attempting to gain unauthorized access to this Site, the server on which this Site is stored or any server, computer or database connected to this Site. You also are prohibited from attacking this Site via a denial-of-service attack or a distributed denial-of-service attack.

Any attempt by you to gain unauthorized access to any computer system, including accounts or databases maintained by and for LexisNexis is strictly forbidden. You agree to comply with all applicable laws relating to such conduct and all laws, rules and regulations regarding transmission of technical data exported from the United States. If you engage in any activities prohibited by this paragraph or violate any of these Terms, your account may be terminated and your use of the Services and Site prohibited. LexisNexis reserves the right to investigate complaints or reported violations of these Terms and to take any action it deems appropriate including, but not limited to, reporting any suspected unlawful activity to law enforcement officials, regulators, or other third parties and disclosing any information necessary to such persons or entities relating to user profiles, email addresses, usage history, posted materials, IP addresses and traffic information. You acknowledge that LexisNexis has the right to report to law enforcement authorities any action that may be considered illegal, as well as any reports it receives of such conduct.

Ownership of Intellectual Property, Trademarks, Licenses and Permitted Uses

LexisNexis owns all intellectual property rights in and to the Services and this Site, including without limitation the graphics, names, text, software, music, videos, sound, pictures, compilations, gross statistical data, page layout, design, processes, procedures, magnetic translation, digital conversion or other material contained in them including all modifications thereto.

The LexisNexis and CounselLink logos, all product names, regardless of whether they appear with capital letters or with a trademark symbol, and all products denoted with TM, SM or ® are trademarks or registered trademarks of LexisNexis, its affiliated companies, or its licensors. Nothing contained on this Site should be construed as granting any license or right to use any trademark displayed on this Site without the express written permission of LexisNexis.

Subject to your payment of any fees, if applicable, LexisNexis hereby grants you a limited, revocable, nonexclusive, nontransferable license (without the right to grant sublicenses) to view and use the Site and Services solely for your company's or law firm's internal business purposes. You may download, view, use, copy, print, distribute or transmit reports or updates made available through this Site, subject to your retention of all copyright, trademark and other proprietary notices included in such materials. You may not copy, display, adapt, print, republish, "mirror", reproduce, frame, distribute, download, upload, license, sell, post, decompile, reverse engineer, disassemble, translate, create derivative works or exploit any materials or parts of the Site or Services for commercial purposes, for profit, or make available to third parties any portion of this Site.

Privacy

You can review LexisNexis Privacy Policy by accessing it at the link near the bottom of the landing page.

International Data

All data submitted into the Services is processed in the United States. LexisNexis is a data processor, not a data controller as defined by EU data protection laws or regimes. Data must be entered by the responsible user into the Services. If any personal data is transferred to LexisNexis, the law firm or business transferring the data must notify the individuals to whom the data pertains.

Disclaimers

LexisNexis does not represent or warrant that the Site or the Services are or will be uninterrupted, secure, virus-free, error-free, that defects will be remedied, or that the information available on or via the Site and Services is correct, accurate, timely or otherwise reliable. USER EXPRESSLY ACKNOWLEDGES AND AGREES THAT USE OF THE PRODUCTS, SERVICES OR SITES ARE AT USER'S SOLE RISK. THE SERVICES AND SITE ARE PROVIDED "AS IS". LEXISNEXIS EXPRESSLY DISCLAIMS ALL WARRANTIES AND CONDITIONS OF ANY KIND, WHETHER EXPRESS OR IMPLIED, INCLUDING BUT NOT LIMITED TO WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE AND NON-INFRINGEMENT. THE CONTENTS OF THE SERVICES AND SITE MAY CONTAIN BUGS, ERRORS, PROBLEMS OR OTHER LIMITATIONS. LEXISNEXIS MAKES NO WARRANTIES THAT THE SERVICES OR SITE WILL MEET USER'S REQUIREMENTS. AS A USER, YOU UNDERSTAND AND AGREES THAT ANY MATERIAL AND/OR DATA DOWNLOADED OR OTHERWISE OBTAINED THROUGH USE OF THE SERVICES OR SITE IS DONE AT YOUR OWN DISCRETION AND RISK AND THAT YOU WILL BE SOLELY RESPONSIBLE FOR ANY DAMAGE TO YOUR OWN COMPUTER SYSTEM OR LOSS OF DATA THAT RESULTS FROM THE DOWNLOAD OF SUCH MATERIAL OR DATA.

In jurisdictions where an exclusion of implied warranties is not permitted, the foregoing disclaimer will not apply.

Limitation of Liability

NEITHER LEXISNEXIS, NOR ANY SUBSIDIARIES, AFFILIATES, OFFICERS OR EMPLOYEES THEREOF SHALL BE LIABLE FOR ANY LOSS, INJURY, CLAIM, LIABILITY OR DAMAGE OF ANY KIND, INCLUDING WITHOUT LIMITATION ANY DIRECT, INDIRECT, CONSEQUENTIAL, SPECIAL OR PUNITIVE DAMAGES, RESULTING FROM ARISING OUT OF OR IN ANY WAY RELATED TO THE SERVICES OR THIS SITE, INCLUDING ANY ERRORS OR OMISSIONS FROM THIS SITE AND ITS CONTENT, THE UNAVAILABILITY OF THE SITE OR ANY PORTION THEREOF, YOUR USE OF THE SITE, OR YOUR USE OF ANY EQUIPMENT OR SOFTWARE IN CONNECTION WITH THE SITE, WHETHER BASED IN CONTRACT, TORT, STRICT LIABILITY OR OTHERWISE, EVEN IF LEXISNEXIS HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.

Links

If you link to this Site, the link may not be used in any way that suggests that LexisNexis endorses you or your website, or that disparages LexisNexis or its products or services. We reserve the right to request that you remove any link to this Site. This Site provides links to other web sites and online resources. LexisNexis is not responsible for, and does not endorse, such external sites or resources. Your use of third-party websites and resources that are linked to this Site is at your own risk.

Modifications, Future Product Offerings and Enhancements

LexisNexis, with or without notice, may make improvements and/or changes to features, functionality or content on the Site or in the Services at any time. LexisNexis shall also have the right at any time to change or discontinue any aspect of or feature of the Services or Site, including but not limited to content, functionality and equipment needed for access or use. Such changes, modifications, or additions shall be effective immediately upon notice to User, which notice may be given by any reasonable means in LexisNexis' discretion. LexisNexis will not be liable for any loss or damage caused by a virus, distributed denial-of-service attack, or other technologically harmful material that may infect your equipment, computer programs, data or other proprietary material due to your use of the Site or due to your downloading of any content from it, or on any website linked to it. This Site may contain descriptions of future product offerings, changes or enhancements. You should not rely on prospective statements regarding any future offerings about the improved functionality or product enhancements until they are publicly released and in use on the Site.

Governing Law; Local Laws

These Terms are governed by and shall be construed in accordance with the laws of the United States of America and the State of Ohio, without regard to its conflicts of law provisions. Any legal action or proceeding arising out of or relating to these Terms, the Services or the Site, whether in contract, tort or otherwise, shall be exclusively subject to the jurisdiction of the federal or state courts located in Dayton, Ohio. LexisNexis controls and operates the Services and this Site from within the United States and makes no representation that the content, services or information is appropriate or will be available for use in other locations. Unless otherwise explicitly stated, all marketing or promotional materials found on this Site are solely directed to individuals, companies or other entities located in the United States. If you use this Site from outside the United States, you are entirely responsible for compliance with applicable local laws, including but not limited to export and import regulations.

© Copyright 1990-2015, LexisNexis Inc. - All Rights Reserved.
No part of this Web site may be reproduced, distributed or stored in any form or by any means without the written permission of LexisNexis Inc.

Terms & Conditions page

Two-Factor Authentication Security

CounselLink utilizes multi-factor authentication to help safeguard against attackers gaining access by enforcing a secondary means of authentication from a verifiable device. With Two-Factor authentication enabled, you'll enter your normal CounselLink password when logging in. Once you enter your password, CounselLink will send a verification code to your preferred method (email or mobile). Once you enter your verification code you will be logged into CounselLink.

Enter Taxpayer ID Number

A Taxpayer ID number field is provided in two places, one on the **Firm** profile, and the second is on the **Office** screen. If your firm uses different Taxpayer ID numbers for separate offices, or the US TID does not apply to an international office, enter the number at the **Office** levels only. If the one number applies to all offices, the number can be entered at the **Firm** level.

If you are already registered, you may access the Office TID field:

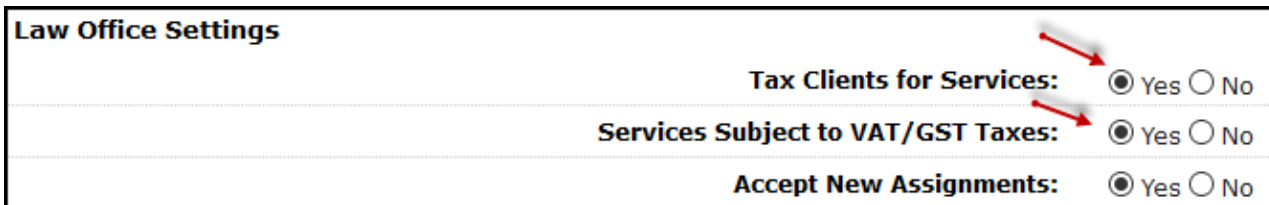
- Clicking the link under **Offices**
- Click the first **Edit** button
- Enter the number and click **Save**



The screenshot shows a form titled "Address Information" with a "Save" button and a "Cancel" button. At the bottom right, there is a "Taxpayer ID:" label followed by an empty input field. A red arrow points to the input field.

Tax Settings Configuration on Law Office Profile

If your firm's services are subject to **VAT/GST Taxes**, or you tax Clients for services, you **must** configure settings in Counsellink. To configure, click the Office profile link, click the first 'Edit' button, and change Tax settings to 'Yes' as applicable, and then click 'Save'.



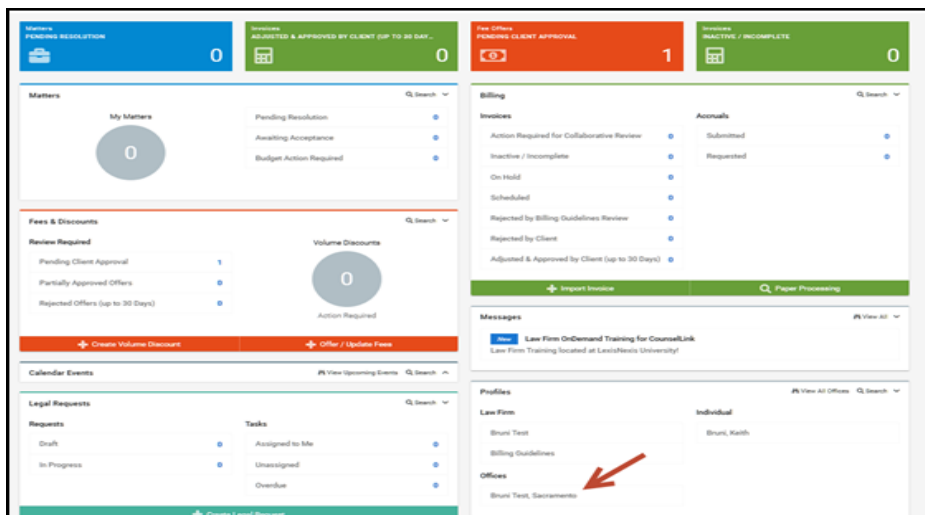
The screenshot shows the "Law Office Settings" form. It has three rows of settings, each with a radio button for "Yes" and "No":
1. "Tax Clients for Services:" with "Yes" selected.
2. "Services Subject to VAT/GST Taxes:" with "Yes" selected.
3. "Accept New Assignments:" with "Yes" selected.
Red arrows point to the "Yes" radio buttons in the first two rows.

Add Timekeepers

The term **Timekeeper** refers to anyone who does billable work for a client. Official titles for people who are considered Counsellink timekeepers may include but are not limited to attorneys, paralegals, legal assistants, consultants, etc. Timekeepers must be added to Counsellink before charges can be added for them on any invoice.

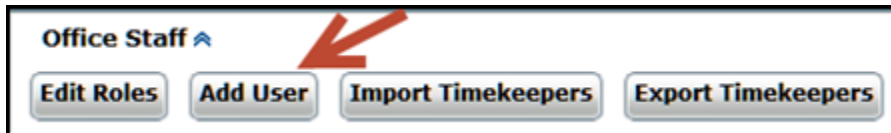
Add an Individual Timekeeper

1. In the Profiles section of the Home page under the Offices label, click your law firm office link.



The screenshot shows the Counsellink Home page dashboard. It has several sections:
- **Matters:** My Matters (0), Pending Resolution, Awaiting Acceptance, Budget Action Required.
- **Fees & Discounts:** Review Required (Pending Client Approval: 1, Partially Approved Offers, Rejected Offers), Volume Discounts (0), Action Required.
- **Billing:** Invoices (Action Required for Collaborative Review, Inactive / Incomplete, On Hold, Scheduled, Rejected by Billing Guidelines Review, Rejected by Client, Adjusted & Approved by Client), Annuals (Submitted, Requested).
- **Messages:** Law Firm OnDemand Training for Counsellink.
- **Profiles:** Law Firm (Bruni Test), Individual (Bruni, Keith).
A red arrow points to the "Offices" link in the Profiles section, which is highlighted in blue.

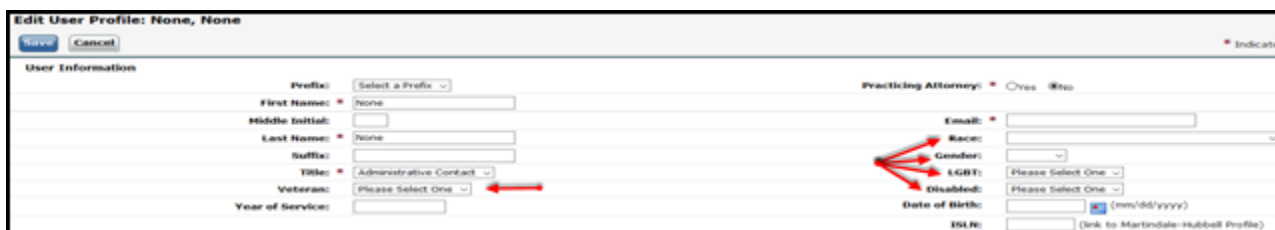
2. Scroll down to the Office Staff section of the profile and click **Add User**.



3. On the Add New Individual page, complete all the required fields, as denoted by the asterisk (*).

Please note the following:

- If the biller is an attorney, change **Practicing Attorney** to YES. Otherwise leave the default setting.
- Change **Activate Login** to YES only if this person needs to log into Counsellink. Most timekeepers do not need access. If the default remains NO, an **email address** is not required.
- Some clients require that you complete the **Veteran, Race, Gender, LGBT** and **Disability** fields. Please refer to your registration request email to determine if your client requires these fields.



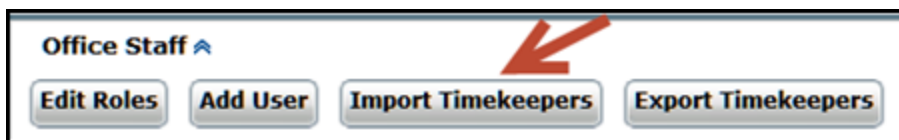
- The **Primary Timekeeper ID** must match the identifier used on your invoices for this biller. The ID can be numbers, letters or a combination of both.



4. Click **Save**
5. If the timekeeper is a practicing attorney, a Roles screen displays. Do not change the default settings - click **Save**
6. Repeat these steps to add all timekeepers who will bill the client

Import Timekeepers from Template

If you have many timekeepers to enter, you can use a template to import them as a group.



1. From the law office profile, scroll down to the Office Staff section and click **Import Timekeepers**.
2. If no timekeepers have been entered previously, click **Blank Template**. If some timekeepers have been entered already, click **Existing Timekeepers**. The Microsoft Excel template downloads to your computer.

Download Template File:	Blank Template
Export Existing Timekeepers:	Existing Timekeepers
Select file to import: *	<input type="button" value="Browse..."/> No file selected.

3. Open the file and enter the timekeeper information. See the **Example and Details** worksheet tab for formatting examples. Then save the file.
4. In Counsellink, return to Timekeeper Data Import page and click the **Browse** button.
5. Locate and select the Excel file from where it is saved on your computer.
6. Click **Import**.
7. View the **Data Import Summary** section and choose how to proceed.
 - a. Click the **View Status Report** for more details if import errors occurred. Fix the errors on the template and attempt the import again.
 - b. If no errors occurred, click **Continue** to complete the import.
8. Click **Done**.

Timekeeper Rates

Your client may enter the agreed upon rates for each timekeeper in Counsellink or request that you enter the rates and submit them for review and approval.

Client Enters Rates

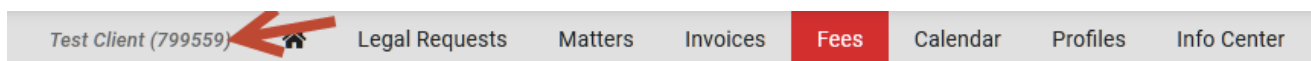
If your client has had a fee structure configured so they enter rates, no 'Add Fee Offer' button will display to you. The client will enter rates and no action will be required by you in this section. You have completed the registration requirements for your client. Once your client completes this step, matters can be assigned to your Counsellink account and invoicing can begin.

Law Firm Enters Rates

If your client has requested that you enter rates for your timekeepers, LexisNexis must assign your law firm to your client in Counsellink before you can complete this step. To expedite this process, you may contact Attorney Implementation at attorneyimplementation@lexisnexis.com.

Once LexisNexis has completed the assignment, log into Counsellink to enter the timekeeper rates:

1. Confirm that your client's name displays in the upper left corner of your Counsellink Home page. If not, select the client from the drop-down list.



2. Click the **Fees** tab. In the top right corner, confirm the **Fee Structures** view is selected.

View: <input checked="" type="radio"/> Fee Structures <input type="radio"/> Fee Offers

3. If you have multiple offices registered, select a **Law Firm Office Name** in the filters panel. Fee structures for the selected office will display. If you do not find the fee structure you need, contact [Attorney Implementation](#).
4. Click the **Fee Structure ID** link. The Fee Structure Overview page displays.

Fee Structure	
Id	Fee Structure Name
5238	Detailed Hourly Fee Arrangement

5. Select the **Fee Offers** tab

Fee Structure: 5238 ACTIVE
 In Use By: T&D Inc.

Fee Structure Information

Fee Structure ID 5238	Fee Structure Currency US Dollar
Fee Structure Name Detailed Hourly Fee Arrangement	Group Type Private
Fee Offers Controlled By Law Firm	Area of Law General
	Matter Type General

Stage Structure Fee Offers

Current and Future Offers (0)

[+ Add Fee Offer](#) Filter Offers by Type

Group By: None

Fee Offer ID	Effective Date	Status
(0 offers listed)		

6. Click the **Add Fee Offer** button. The **Create Fee Offer** screen displays.
7. **Effective Date:** Leave the default date set to the current date.
8. **Fee Offer Currency:** Select if different from the default value.
9. **Offered Counties:** Leave the default state and counties of **N/A - N/A**.
10. **Stage Structure:** Enter **\$0** rates in each of the three Offered Amount boxes for **Partner Rate, Associate Rate, and Paralegal Rate**.
11. **Timekeepers:** Enter the timekeeper's hourly rate in the Rate box for each individual timekeeper that will be billing for this client's matters. Note: If a listed timekeeper will not bill this client, leave their box blank. **Do not enter \$0.**

Create Fee Offer
 In Use By T&D Inc.

Fee Offer
 Effective Date: 11/18/2019
 Fee Offer Currency: US Dollar

Fee Structure
 Fee Structure Name: 5238 - Detailed Hourly Fee Arrangement
 Fee Structure Currency: US Dollar
 Group Type: Private
 Area of Law: General

Stage Structure

Line #	Stage	Fee Type	Offered Amount
1	Detailed Hourly Rates	Detail Billing	Enter values below
Rate Structure			Offered Amount
	Partner Rate	Max Allowed	<input type="text"/>
	Associate Rate		<input type="text"/>
	Paralegal Rate		<input type="text"/>

Timekeepers

[Download Timekeeper Rates Template](#) [Upload Timekeeper Rates](#)

Group By: Timekeeper Level

Timekeeper	Initials	Rate	Reason for Rate Change
Timekeeper Level: Associate			
User: Admin	ADM	<input type="text"/>	<input type="text"/>
Timekeeper Level: Partner			
Partner: Larisa	PLP	<input type="text"/>	<input type="text"/>

2 items Show 200

12. Click **Save**, then **OK**. The fee offer will show a 'Pending Approval' status. CounselLink notifies your client that your rates are ready for their review.

Note: If your client requires that their Billing Guidelines be acknowledged online, a notification displays at the top of the screen. See instructions below for how to **Acknowledge Billing Guidelines**.

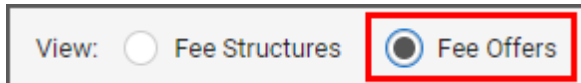
13. Repeat the Add Fee Offer process for each Fee Structure / Law Firm Office that your client has requested.

Add Discounts to Fee Offer

After a fee offer has been added, you can enter discount terms.

Select the **Fees** tab. The Fee Search page displays

1. In the upper-right corner, select the **Fee Offer** option

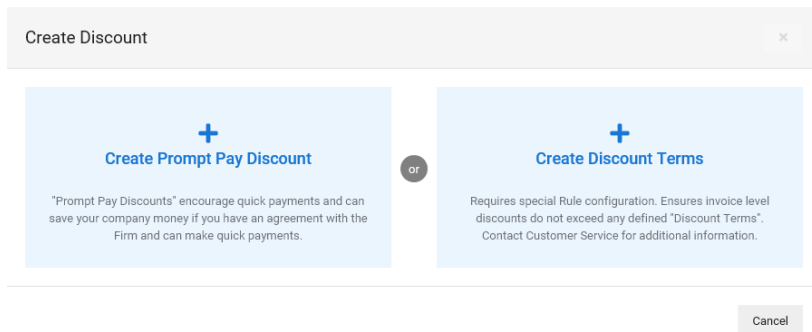


2. Click the **Fee Offer ID** link. The Fee Offer Overview page displays

<input type="checkbox"/>	Fee Offer Id	Fee Structure Name	Fee Structure Id
<input type="checkbox"/>	5028408939	Detailed Hourly Fee Arrangement	5238

3. CounselLink provides different types of discount formats. In the **Discounts** section click **Create Discount**, select the applicable discount links.

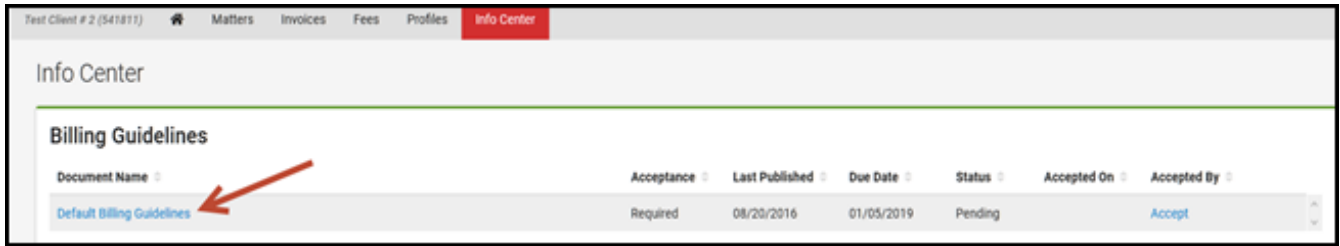
- **Prompt Approval Discount:** On the Edit Prompt Approval Discount screen, enter the discount terms and settings, then click **Save**
- **Discount Terms:** On the Edit Discount Terms screen, enter the discount terms as a percentage of Fees, Expenses or both, then click **Save**



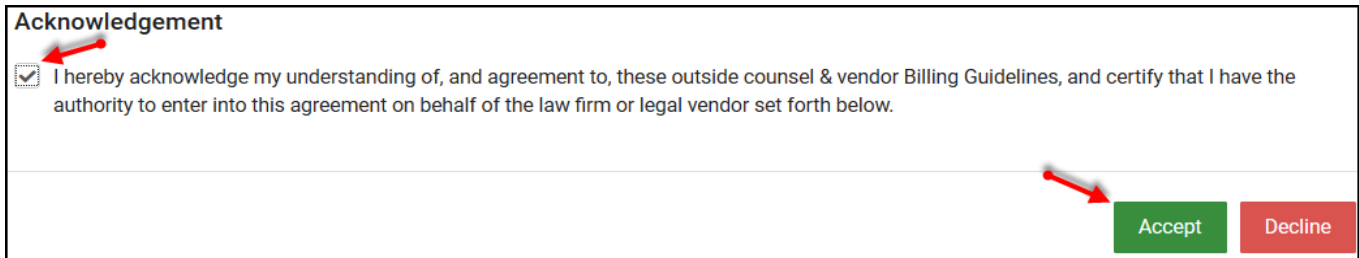
Billing Guidelines Acknowledgement

Your client may require that you acknowledge their billing guidelines online. To access the guidelines:

1. Select to the **Info Center** tab
2. Click the **Billing Guidelines** link



3. The billing guidelines can be printed by clicking the Print link in the upper right corner of the page
4. The Billing Guidelines Agreement Confirmation displays
 - a. Select the check box to acknowledge the statement
 - b. Click **Accept**



Matter Assignments

Once rates have been entered and approved, your client will assign matters to you. The matter must be accepted before invoices can be submitted. Some clients configure CounselLink to automatically complete the matter acceptance step, while others require the law firm to manually accept the assignment. An email notification with instructions is sent to the law firm each time new matters are assigned. Follow the instructions in the email.

Client Configures Automatic Matter Acceptance

If your client configured CounselLink to automatically complete the matter acceptance step on behalf of law firms, no action is required in this section. Once you receive notification that a matter has been assigned, you can access it from the CounselLink Home page.

Accept a Matter Assignment

If your client configured CounselLink to require law firm acceptance of the matter assignment, complete the following steps:

1. Select the **Awaiting Acceptance** link in the Matters section of the Home page.
2. On the Matter Search page, select the check box adjacent to the matter.
3. Click the **More Actions** button and select **Accept Assignment**.

Completing Diversity Information in CounselLink

Some clients request diversity information be entered into CounselLink on individual timekeepers and/or on the law firm profile. If your client is requesting diversity information be completed, please see the steps below:

Individual Timekeeper Diversity Information:

1. Click the Office name under the Profiles section of the CounselLink Home page

The screenshot shows the 'Profiles' section of the CounselLink interface. It has a search bar and a 'View All Offices' link. Below are two columns: 'Law Firm' and 'Individual'. The 'Law Firm' column contains 'Test Law Firm' and 'Billing Guidelines'. The 'Individual' column contains 'User, Admin' and 'Download CounselLink Add-in for Outlook®'. At the bottom, there is an 'Offices' section with a list containing 'Test Law Firm, Sacramento', which is highlighted with a red arrow.

2. Click the Name of the timekeeper from the Office Staff section of the Office Profile page

The screenshot shows the 'Office Staff' section of an office profile. It has buttons for 'Edit Roles', 'Add User', 'Import Timekeepers', and 'Export Timekeepers'. Below is a table with columns 'Name' and 'Role(s) in this office'. The table contains two rows: 'Partner, Larisa' and 'User, Admin'. The 'Partner, Larisa' row is highlighted with a red arrow. The roles for 'Partner, Larisa' are 'Partner, Practicing Attorney, Budget Contact, Document Administrator, Admin Matter Change Approval Contact'. The roles for 'User, Admin' are 'Partner, Budget Contact, Document Administrator, Admin, Accts Payable Cor Approval Contact'.

3. Click Edit

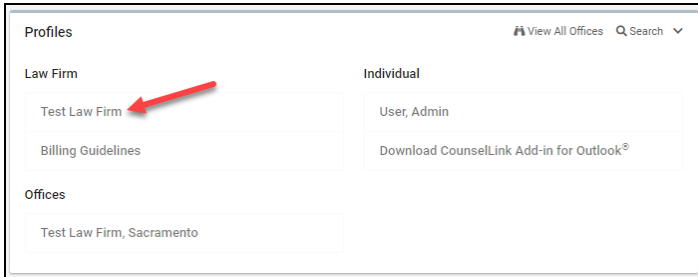
The screenshot shows the 'Law Firm User Profile: Partner, Larisa' page. It has an 'Edit' button highlighted with a red box. Below the button is the text 'Law Firm Individual Profile'.

4. Enter or update the timekeeper diversity information fields (Gender, Race, LGBT, Disabled, and/or Veteran)
5. Click Save

The screenshot shows the 'Edit User Profile: Partner, Larisa' form. It has 'Save' and 'Cancel' buttons at the top left. The form is divided into 'User Information' and 'Practicing Attorney' sections. The 'User Information' section includes fields for Prefix, First Name, Middle Initial, Last Name, Suffix, Title, Veteran, and Year of Service. The 'Practicing Attorney' section includes fields for Practicing Attorney, Activate Login, Email, Race, Gender, LGBT, Disabled, Date of Birth, and ISLN. Red arrows point to the 'Save' button, the 'Veteran' field, and the 'Race', 'Gender', 'LGBT', and 'Disabled' fields.

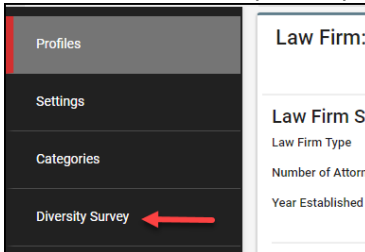
Law Firm Diversity Survey:

1. Click the Firm name under the Profiles section of the CounselLink Home page



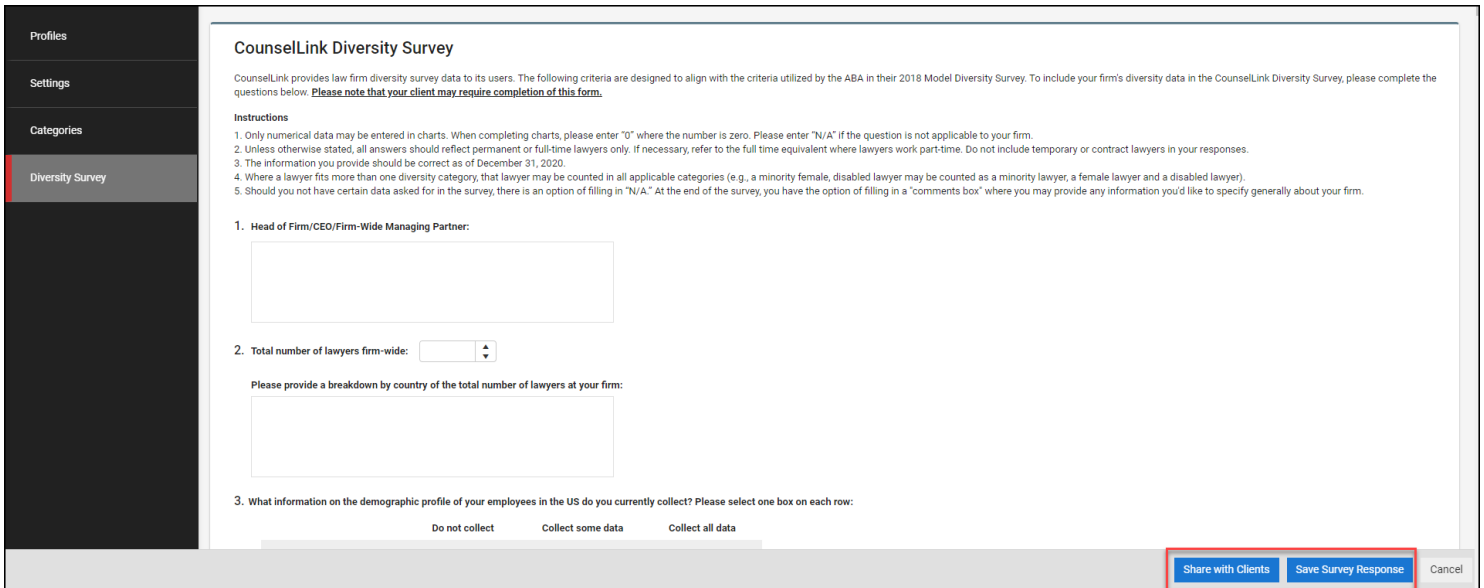
The screenshot shows the 'Profiles' section of the CounselLink Home page. It features a search bar and a list of profiles. Under the 'Law Firm' section, 'Test Law Firm' is highlighted with a red arrow. Below it are links for 'Billing Guidelines' and 'Offices'. Under the 'Individual' section, there are links for 'User, Admin' and 'Download CounselLink Add-in for Outlook®'. Under the 'Offices' section, 'Test Law Firm, Sacramento' is listed.

2. Click Diversity Survey from the Law Firm Profile page



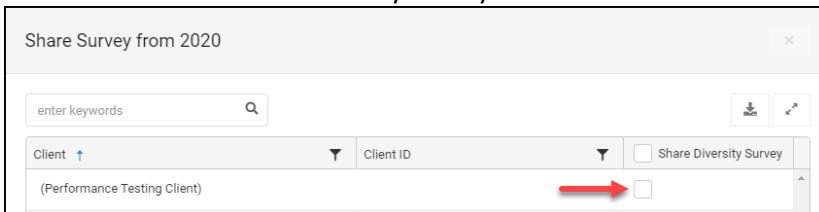
The screenshot shows the 'Law Firm:' profile page. On the left is a navigation menu with 'Profiles', 'Settings', 'Categories', and 'Diversity Survey'. A red arrow points to 'Diversity Survey'. On the right, the profile details are shown, including 'Law Firm Type', 'Number of Attorneys', and 'Year Established'.

3. Complete the questions listed in the Diversity Survey
4. Click Save Survey Response
5. Click Share with Clients



The screenshot shows the 'CounselLink Diversity Survey' form. It includes instructions and a list of questions. Question 1 is 'Head of Firm/CEO/Firm-Wide Managing Partner:' with a text input field. Question 2 is 'Total number of lawyers firm-wide:' with a numeric input field. Below question 2 is a section for 'Please provide a breakdown by country of the total number of lawyers at your firm:' with a table. Question 3 is 'What information on the demographic profile of your employees in the US do you currently collect? Please select one box on each row:' with three radio button options: 'Do not collect', 'Collect some data', and 'Collect all data'. At the bottom right, there are three buttons: 'Share with Clients', 'Save Survey Response', and 'Cancel'. A red box highlights the 'Share with Clients' and 'Save Survey Response' buttons.

6. Select the Share Diversity Survey check box to share the diversity survey with the selected client




The screenshot shows the 'Share Survey from 2020' dialog box. It has a search bar at the top. Below it is a table with columns for 'Client', 'Client ID', and 'Share Diversity Survey'. The first row shows '(Performance Testing Client)' with a red arrow pointing to the 'Share Diversity Survey' checkbox.

7. Click Close

Creating an Additional Office

To create an additional office, perform the following:

1. Click the **Profiles** tab from the **Home** Page.
2. Click the **“Add Office”** button.

Offices		Timekeepers	
Law Office Name ^	1-9 of 9 Law Firm Offices		
<input type="checkbox"/> Bruni - AIS, Fresno	1	+ Add Office 	
<input type="checkbox"/> Bruni - AIS, Lake Tahoe	1	Law Office Name ⌵	Group Type ⌵
<input type="checkbox"/> Bruni - AIS, Las Gatos	1	Bruni - AIS, Fresno	Private
<input type="checkbox"/> Bruni - AIS, Orangevale	1	Bruni - AIS, Sacramento	Private
<input type="checkbox"/> Bruni - AIS, Palm Springs	1	Bruni - AIS, Palm Springs	Private
<input type="checkbox"/> Bruni - AIS, Sacramento	1	Bruni AIS, Raleigh	Private
<input type="checkbox"/> Bruni AIS, New York	1	Bruni AIS, New York	Private
<input type="checkbox"/> Bruni AIS, Raleigh	1		

3. Enter in the new office information. Check the **“Remit To”** box if the remit to address is the same. If it is different, leave the box unchecked and fill in the correct remit to address.

Create Law Office

* Indicates Required Fields

Address Information	
Taxpayer ID: <input type="text"/>	
Law Office Name: * <input type="text"/>	Remit To: <input type="checkbox"/> Same as Law Office Address
Office Address: * <input type="text"/>	Remit To Address: * <input type="text"/>
City: * <input type="text"/>	City: * <input type="text"/>
Country: * <input type="text" value="UNITED STATES"/>	Country: * <input type="text" value="UNITED STATES"/>
State/Province: * <input type="text" value="Alabama"/>	State/Province: * <input type="text" value="Alabama"/>
Zip/Postal Code: <input type="text"/>	Zip/Postal Code: <input type="text"/>
Phone: * <input type="text"/> Ext: <input type="text"/>	Phone: * <input type="text"/> Ext: <input type="text"/>
Fax: <input type="text"/>	Fax: <input type="text"/>
Preferred Currency: * <input type="text" value="US Dollar"/>	

4. Click **Save**

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

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

Invoice Processing

Your client uses CounselLink to receive and process all legal invoices. All invoices must be submitted through CounselLink. **Invoices received for matters that have not been assigned through CounselLink will be rejected.**

Note: Detailed instructions for submitting invoices, troubleshooting rejected invoices, and many other topics are available from the **Help (?)** link located in the upper right corner of every screen.

Preferred Invoice Submission Method

To secure prompt and accurate payments to your firm, upload invoices using the structured data (LEDES) format. This is the preferred invoice submission method. CounselLink also accepts invoices submitted by mail, email, and those created directly in CounselLink.

Upload a Structured Data (LEDES) File to CounselLink

1. Export the invoice from your time and billing software to the LEDES (ASCII) structured data format. **Examples LEDES 1998B, 1998BI, 2000 and XML 2.1**
2. From the Billing section of the CounselLink Home page, click the **+ Import Invoice** button.
3. You can upload one or more invoice files at once.
 - a. In the Invoice Files section, click the **Choose File** button to the right of the File 1 label.
 - b. Browse to locate the saved LEDES invoice file and select it.
 - c. Click **Open**.
 - d. Repeat the file selection process for each additional invoice. If you need to attach more than 5 files, click the **Add Another File** button.
 - e. Complete any other necessary information on the Import Invoice page.
 - f. Once you have specified all your invoices, click **Next**.

Import Invoice

[Next](#) [Cancel](#)

Click "Browse" to select a file. You can import invoice files up to a total of 10MB.
CounselLink accepts: LEDES 1998B, 1998BI, 2000, XML 2.1 and Examen SDF.

Invoice Files			
File 1: *	Choose File	No file chosen	
File 2:	Choose File	No file chosen	Remove
File 3:	Choose File	No file chosen	Remove
File 4:	Choose File	No file chosen	Remove
File 5:	Choose File	No file chosen	Remove
Add Another File			

LEDES 98B Options

File contains a non-USD invoice:

Add tax to an invoice:

[Next](#) [Cancel](#)

4. If data errors are found, the Import Invoice Status screen appears.
 - a. To see all errors, click **View Status Report**. Read the error messages. For more information, click the message number link. Click **Close** to return.
 - b. To remove an invoice from the upload process due to errors, click the check box near the invoice number and click **Delete**.
 - c. To continue with the upload process, click **Continue**.

5. Confirm or change the **Invoice Currency**. CounselLink will provide the Exchange Rate.
6. Confirm or change the **Fee Tax** and **Expense Tax**.
7. Click **Continue** when all data appears correct.
8. If your client requires additional information on invoices, click the check box near the invoice number, and then click **Add Additional Information**. Fill out the fields on the page. For questions on this data, please contact the client.
9. To provide a document with the invoices such as a receipt, click the check box near the invoice number, and click **Document Attach**.
 - a. Click **Browse** to locate your document.
 - b. Type a **Document Name**.
 - c. If you need to attach more documents, click the **Attach Another Document** button.
 - d. Click **Submit**.
10. At the Final Review page, click **Send** to make the invoice available to the client. The Import Invoice – Confirmation information displays. Review the confirmation page.
11. Click **Done** to finish the invoice upload process.

Note: After upload, CounselLink checks the invoice against the client's billing guidelines. The individual who uploads the invoice will receive a status email regarding the guideline review. This email indicates the number of invoices sent to the client or held. It will also indicate if any billing guideline errors were found or if the client requires additional information. If guideline errors were identified, your invoice will be rejected. You can access the invoice from the **Rejected by Billing Guidelines Review** link on the Home page. Fix the errors and submit the invoice again.

Alternate Invoice Submission Methods

If you are not able to upload a structured data (LEDES) file, use one of these alternate methods to submit your invoices to CounselLink.

Email Invoice

Create invoices in any of the following formats: .pdf, .doc, .txt, and .xls. Invoices must include the following information:

- Service provider name and address
- Client Name
- Corporate Customer Matter ID and Title
- Invoice date
- Unique invoice number
- Text in English
- Fee, disbursement, and invoice total amounts
- Tax and discount amounts separate from fee and disbursement totals, if applicable
- Currency type
- A date for each fee or expense charge
- A complete charge description
- For hourly billing:
 - Use tenth of an hour time increment (e.g., .10, .20, .30, etc.)
 - Include timekeeper IDs and timekeeper rates or cost associated with each charge.
 - Timekeeper summary listing the names, timekeeper IDs, hourly rates and total hours billed by each timekeeper.

Email the invoices to CounselLink for processing. Invoices should be sent as an attachment (6 MB maximum file size) to counsellinkinvoices@lexisnexis.com.

Multiple invoices may be attached to one email but include **only one invoice per file attachment**. Please include any backup documentation (e.g., receipts) at the end of the invoice file and not as a separate file attachment. Do not send balance statements or any other non-invoice documents. Do not send blurry or out-of-focus invoices.

Once the invoice is received, a verification email will be sent out that includes a confirmation number for each invoice attachment. This confirmation number should be retained for tracking purposes.

Note: Invoices that do not meet minimum CounselLink requirements will be rejected and returned to your law firm. An email message is sent to the person who submitted the invoice email as well as individuals in the Accounts Receivable role at the law firm office. The message will contain the reason for the rejection and the actions needed to correct the problems. After fixing the issues, submit the corrected invoice.

Mail Paper Invoice

You can mail an original copy of an invoice on white paper to CounselLink. A separate invoice must be submitted for each matter. Mailed invoices must contain all the same matter, invoice, and charge level data listed in the Email Invoice section above.

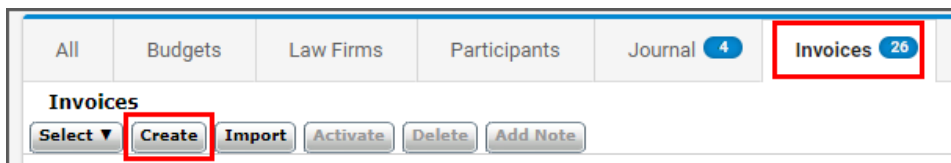
Mail the paper invoices to:

Client Name c/o LexisNexis CounselLink Invoices
1801 Varsity Drive
Raleigh, NC 27606

Create Invoice in CounselLink

You can add an invoice directly to CounselLink if you are not able to create and submit an invoice using any of the other methods.

1. Locate the matter and view the Matter Overview page.
2. Select the **Invoices** tab.



3. Click **Create**. The Create Invoice page displays.
4. Complete the form. Required fields are indicated by an asterisk.

The 'Create Invoice' form includes the following sections and fields:

- Invoice Information:**
 - Corporate Customer Matter ID: M71489255
 - Invoice Currency: US Dollar (dropdown)
 - Law Firm Matter ID: 4427654
 - Law Firm Invoice ID: * 63654780
 - Invoice Date: * 09/27/2017 (calendar icon)
 - Final Invoice: (dropdown)
 - Invoice Description: (text area)
- Additional Information:** (empty section)
- Discount/Premium Information:**
 - Buttons: Add, Delete
 - Table with columns: Description, Type, Apply To, Percentage, Amount (USD), Total (USD)

Buttons: Save (highlighted with a red box), Cancel, * Indicates Required Fields

- Click **Save**. The Invoice Overview page opens and displays a message to add charges to the invoice.

- Click the **Charges** tab and select one of the options:
 - Add Fee** to add charges for the services provided by the timekeepers.
 - Add Expense** to add charges for the expenses incurred by the timekeepers.
- Enter the charge level details, including the Charge Date, Timekeeper Initials, Task Code, Activity Code, Charge Description, Units, Rate, Adjustments, Tax, and Net Amount.
- Click **Save**. The Invoice Overview page displays a message that the invoice must be activated.
- Click **Activate**.
- Click **OK**. The invoice begins processing.

Stages of Invoice Review

Counsellink uses a combination of automated reviews and client reviews to identify and flag issues on invoices.

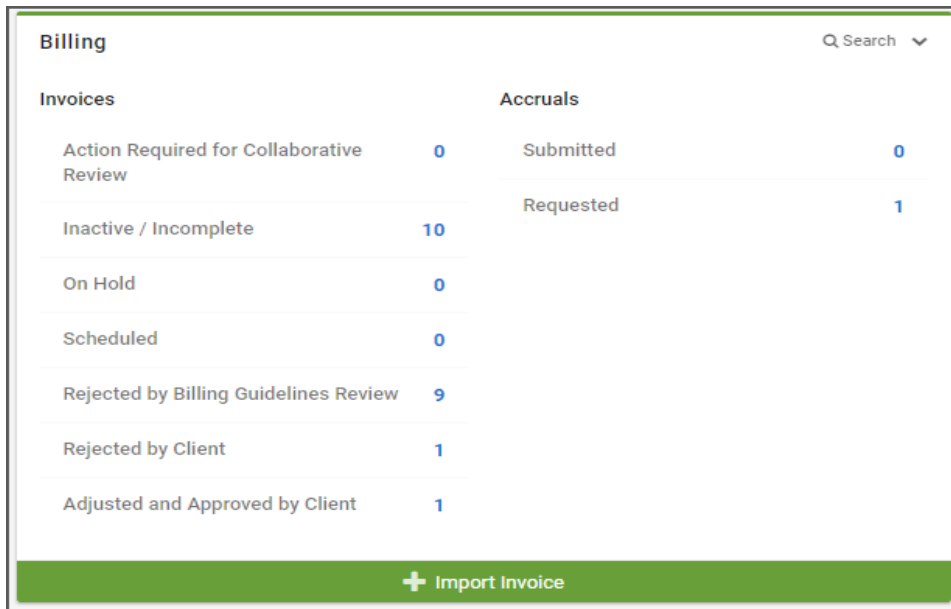
- Validation Review** – All submitted invoices are immediately checked for math and date format errors. If any are detected, error messages display. Resolve the math or date errors and submit the invoice again.
- Billing Guideline Review** – Charge lines are compared to your client’s billing rules. Any violations are noted and either a flag or an adjustment is applied to the charge. Review your client’s billing guidelines to prevent flags and adjustments on future invoices.
- Client Review** - The client reviews all the charge lines, including adjustments and flags added during the Billing Guideline review, and makes charge-level and invoice-level decisions. Once complete, the invoice is approved or rejected by the client. If approved, invoice payments are made.

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

Invoice Statuses

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

- **Action Required for Collaborative Review** - Invoices that were adjusted by the client while using the collaborative review feature. Action is required by the law firm before these invoices can be finalized.
- **Inactive / Incomplete** - Invoices that have been started by the law firm, but have not been sent to the client.
- **On Hold** - Invoices ready to be sent to client, but the invoice cannot be sent because of a pending matter status. Resolve the matter status issue, then submit the invoice.
- **Scheduled** - Some clients require that invoices be sent only during certain time periods. Invoices created prior to a pre-set billing day will be held in this status.
- **Rejected by Billing Guidelines Review** - Invoices sent to the clients and automatically rejected by the corporate client's billing guidelines. Review the billing guidelines before submitting another invoice.
- **Rejected by Client** - Invoices rejected by the client after passing the billing guidelines review. View the invoice or charge-level notes to determine why the invoice was rejected.
- **Adjusted and Approved by Client** - Invoices approved by the client within the last sixty (60) days after adjustments were made. Review the invoice for details about adjustments made.



The screenshot shows a 'Billing' panel with a search bar and two columns: 'Invoices' and 'Accruals'. The 'Invoices' column lists statuses and their counts: Action Required for Collaborative Review (0), Inactive / Incomplete (10), On Hold (0), Scheduled (0), Rejected by Billing Guidelines Review (9), Rejected by Client (1), and Adjusted and Approved by Client (1). The 'Accruals' column lists Submitted (0) and Requested (1). A green bar at the bottom contains a '+ Import Invoice' button.

Billing		Accruals	
Invoices			
Action Required for Collaborative Review	0	Submitted	0
Inactive / Incomplete	10	Requested	1
On Hold	0		
Scheduled	0		
Rejected by Billing Guidelines Review	9		
Rejected by Client	1		
Adjusted and Approved by Client	1		

+ Import Invoice

Adjusting Fees and Rates

Law firms can change an approved fee offer to modify their rates and discounts, such as at the beginning of the year. When the law firm creates a new offer, the rates in the original offer will remain in effect until the new offer has been approved by the client.

Search for a Fee Offer

Locate the fee offers made when work was initially assigned from CounselLink.

1. Click the **Fees** tab.
2. On the Fee Search page, confirm **Fee Offer** is selected as the **View** option in the top-right corner. If not, click that option.

3. Select filters to reduce the number of fee offers shown in the results list until you identify the fee offer to update.

Update a Fee Offer

Submit revised fees and rates for an offer as needed.

1. At the top of the **CounselLink Home Page**, click the **Fees** tab to display the **Fees Search Page**. The Fees Search screen displays.
2. At the top of the screen (right-hand corner) for the category, select **Fee Offers** to view the perspective list.
3. Under the **Fee Offer Id** column, click on the identifier of the Fee Offer to be viewed. The Fee Offer Overview page displays
4. At the top right-hand corner of the screen, click the **Copy Fee Offer** (plus sign) button. The Copy Fee Offer screen displays
5. Complete all fields as applicable (i.e., change / update the **Effective Date, Currency**, and / or enter a reason for the Fee Offer.
6. If the **Stage Structure, Timekeepers** / other sections are collapsed, click the **Expand** button to expand the section.
7. In the **Stage Structure** section, enter / update values as applicable.
8. Optional Step: In the **Timekeepers** section, click **Download Timekeeper Rates Template** if applicable.
9. Click **Open / Save** to complete the **Timekeeper Rates Template** download.
10. Optional Step: In the **Timekeepers** section, click **Upload Timekeeper Rates** if applicable.
11. Choose a file to upload, and proceed.
12. Complete all other aspects of the **Timekeepers** section as applicable, and then click **Save**.
13. An Approval Confirmation screen displays.
14. Click **Yes** to confirm and continue. The Fee Offer Overview screen displays the Fee Offer to include the update reason for the Fee Offer.

View the Status of Fee Offers

The Fees & Discounts panel of the Home page shows the number of fee offers in the following statuses:

- **Pending Client Approval** – The client has been notified of these offers via email, but still needs to review then accept or decline them.
- **Partially Approved Offers** – Indicates that some fees and rates on these offers were accepted while others were rejected. Invoicing for the approved portion can begin, but the rejected portion of the offers are pending resolution.
- **Rejected Offers (up to 30 days)** – The client has reviewed and rejected these offers in the last 30 days. View the offers to see the reasons they were rejected by the client.

Resolve Rejected or Partially Approved Fee Offers

If the client rejects or partially approves a fee offer, the law firm is notified of the reason by email.

1. In the Fees & Discounts panel of the Home page, click the link for the fee offer status.
2. If more than one offer is pending, click the **Fee Offer ID** link in the search results. If only one offer is pending for that status, the Fee Offer ID page opens immediately.
3. Review the message at the top of the page, then modify the offer as needed.
4. Click **Save** to complete the update.
5. Click **OK**. A notification is sent to the client requesting review and approval.

Search to Find the Records You Need

Search Methods

CounselLink provides various search methods to help you locate the records you need.

1. Home page links
2. Quick Search bar
3. Search pages

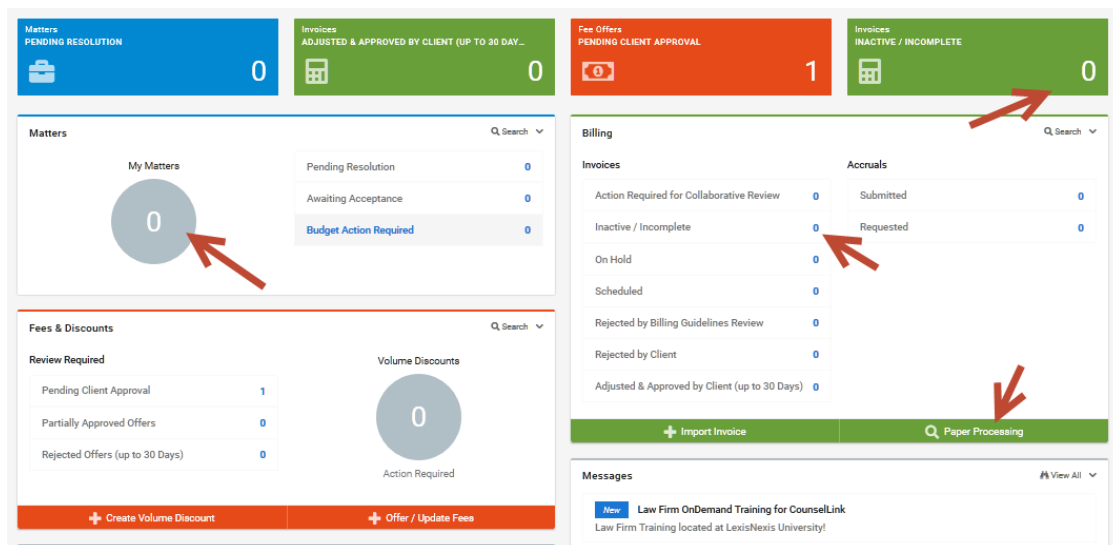
Home Page Links

The CounselLink home page contains links to preconfigured searches. You can access these links by clicking the colored info-tiles at the top of the page or the labeled links grouped in panels by type.

1. Confirm the correct client is selected from the drop-down list in the top left corner.



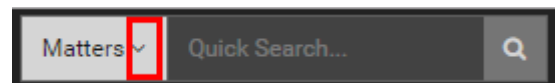
2. Click any labeled search link. The search results page displays.
3. Select a record in the results list to continue.



Quick Search Bar

Use the Quick Search bar at the top of the CounselLink page to perform a search across all standard and custom fields.

1. Confirm the correct client is selected from the drop-down list in the top left corner.
2. Choose to search on **Matters**, **Invoices** or **Documents**.
3. Enter a keyword in the **Quick Search** area.
4. Click the **Search** icon.



Search Pages

Search for records by type.

1. Confirm the correct client is selected from the drop-down list in the top left corner.
2. Click a labeled tab.

- All relevant results automatically display.
- Use the filters to narrow the search results to specific records.

Working with Search Results

Navigate the Search Page

Get familiar with the panels and options on the search page.

- Keyword Search
- Active Search Filters & Reset button
- Search Tips
- Save Search button
- Filter Panel
- Search Results List navigation buttons
- Mass Action Buttons
- Print/Export Options
- Search Result Configuration
- Search Results List

The screenshot shows a search results interface with the following elements highlighted by red boxes and numbered 1 through 10:

- 1:** Search bar with placeholder text "Search Matters..." and a "Search" button.
- 2:** Filter bar showing "Matter Status: Active" and a "Reset to Default" button.
- 3:** "Search Tips" button.
- 4:** "Save Search" button.
- 5:** "Filter Your Results" panel on the left, including "Search Within" and "My Matters" sections.
- 6:** "Show 25" dropdown menu.
- 7:** "Close" button in the mass action bar.
- 8:** Print and export icons.
- 9:** "Columns" configuration button.
- 10:** A red circle highlighting the number "10" next to the "Brown vs Rogers" entry in the results table.

Matter Number	Matter Title	Matter Contact	Matter Type
<input type="checkbox"/> M72671651	Hatchett Claim 01255154	Gomez, Lena	Litigation
<input type="checkbox"/> M72666836	Smith vs Rogers	Brown, Robert S	Litigation
<input type="checkbox"/> M72593071	Brown vs Rogers	Brown, Robert S	Litigation
<input type="checkbox"/> M72447687	Techland Merger	Brown, Robert S	Litigation
<input type="checkbox"/> M72447369	Green vs. Rogers	Brown, Robert S	Litigation

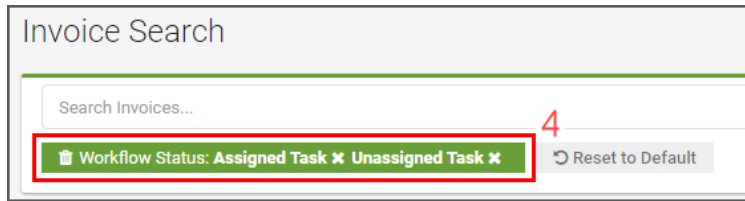
Keyword Search Tips

When using the Keyword Search bar to narrow your search results, multiple terms you enter are “AND’ed” together by default, meaning all terms must be found in a record for it to display in your results. The **Search Tips** button displays a list of parameters that you can use to refine your keyword search in other ways:

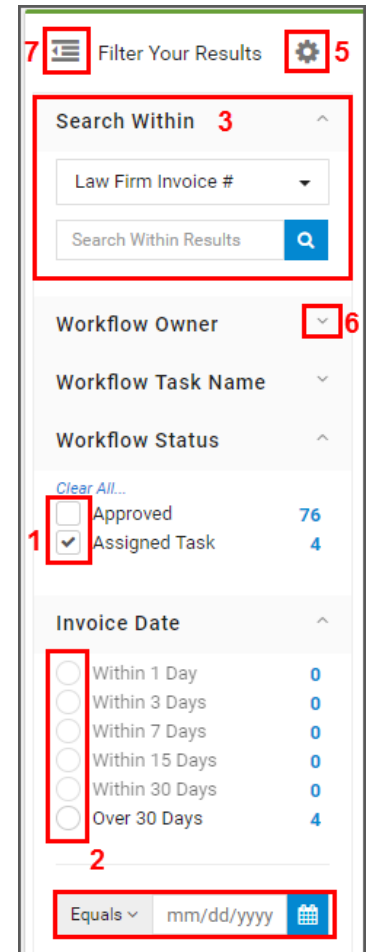
- Wildcard:** Type in a word or partial word and enter * at the end for results that have terms that begin the same.
- Exact Match:** Use double quotes around two or more keywords to return an exact match.
- Exclude:** Use NOT (caps required) to exclude a term.
- Match Any:** Use OR (caps required) to find one term.
- Sub Strings:** Find part of an entire term by entering that portion directly in the search box.

Use the Filter Panel

When you access any search page, the default filters applied are listed below the Search bar. Use the **Filter Your Results** panel to refine the search results. Filters are available for most standard and custom fields.



1. Select filters by placing a check mark next to any filter attribute. The search results automatically refresh.
2. For date filters, select a date range option. Or select a date comparison calculator from the drop-down list then enter the date.
3. Use the **Search Within** option to narrow search results by a keyword found in a specific field.
 - a. Click the arrow to select a field to search within.
 - b. Enter a keyword.
 - c. Click the **Search** icon.
4. Clear any filter shown below the Search bar by clicking the **X** beside it. Or click the **Reset to Default** button.
5. Click the **Configure Filters** icon to select which filters display in the panel.
6. Click the arrow to the right of any filter to collapse the section if desired.
7. Click the icon to hide the Filter Your Results panel when not in use.



Configure Search Results

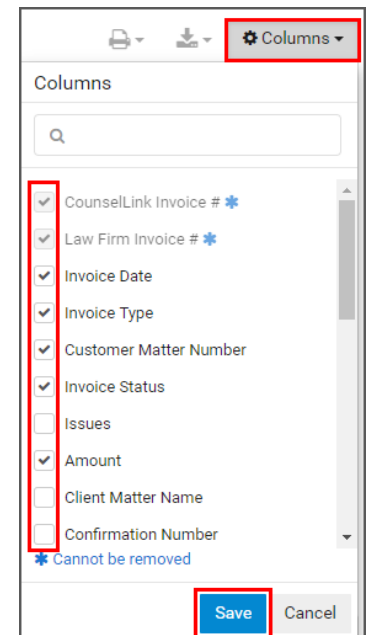
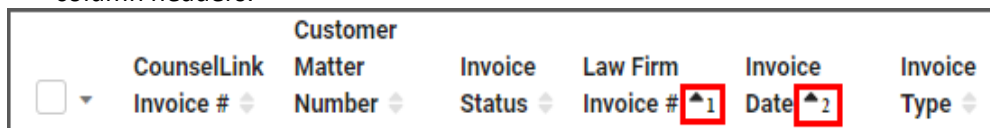
You can customize which columns display in the Search Results list and in what order. Customize the view to show the details you need.

1. Click the **Columns** icon.
2. Click the check boxes to select the fields to display. Remove check boxes beside the fields you do not want to show. Scroll down to view additional options.
3. Click **Save**. The selected columns display to the right on the list.
4. Left-click a column header and drag it into the desired order. Repeat as needed to rearrange the column order.

Sort Search Results

Sort search results by any visible column.

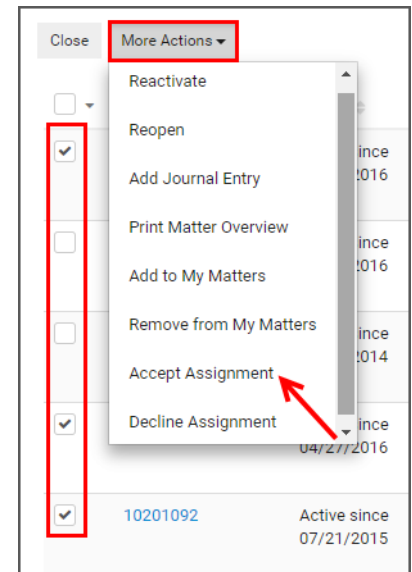
1. Click any column header to sort ascending.
2. Click a second time to change to a descending sort order.
3. To sort by more than one column, hold down the **Shift** key while clicking multiple column headers.



Complete Actions from the Search Results

Many actions can be completed directly from the search results list. You can modify multiple records at once using available actions.

1. Select one or more items from the search results list with a check mark.
2. Perform an action on selected items.
 - a. Click an action button.
 - b. Select an option from the **More Actions** drop-down list.



Print or Export Search Results

Print ad hoc reports or export data for sharing and analysis.

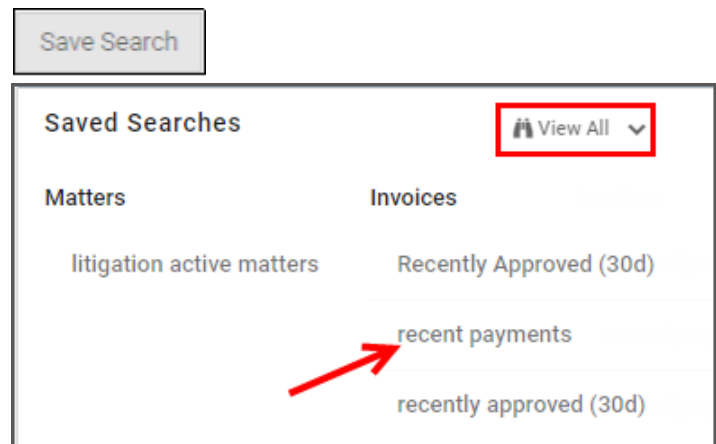
1. Select one or more items from the search results list with a check mark.
2. Click the **Print** icon to print the selected items.
3. Click the **Export** icon to create a spreadsheet of the selected items.



Save a Search

You can save a configured search to reuse it again.

1. Configure a search using the filter options.
2. Click the **Save Search** button.
3. Enter a name for your search.
4. Click **Save**.
5. Saved Searches are available from the drop-down list at the top of the Search page or from the **Saved Searches** panel on the Home page.
6. Click any saved search name to run it again.
7. Manage your saved searches by clicking **View All** on the Home page.



Support Resources

Training and support resources are available to assist you with Counsellink when needed.

Training

LexisNexis provides free [OnDemand video training](#) that is available 24X7. The self-navigational module covers a range of topics including:

- Configuration
- Rate submission
- Matter management
- Successful invoicing

We also provide a virtual, instructor-led course: [Working Efficiently in Counsellink](#). The 1 hour workshop is free to all participants. Topics include:

- Search features and shortcuts
- Updating fees and rates
- Understanding invoice review and statuses
- Microsoft Outlook integration
- General troubleshooting

Attorney Implementation Support

Direct any questions regarding the initial law firm registration process to the Attorney Implementation specialists.



Attorney Implementation support is available Monday– Friday, 9:00 am to 7:00 pm, Eastern Time (US)



Email support request to: attorneyimplementation@lexisnexis.com

Customer Support

Counsellink has a Customer Support team that is available to both corporate clients and law firms. Trained phone representatives are available to answer your questions concerning logins and passwords, fee offers and rates, matters, invoices, and more.

You can leave a phone message or send an email to the support team at any time. Calls are returned throughout the day.

Phone Support



24x7 Free Customer Support



United States: 1-800-600-2282



International: +1 919.378.2713

Email Support



General Support: ask@lexisnexis.com



Test Invoices: InvoiceTest@lexisnexis.com

If an invoice has been returned due to an error and you need further explanation, you can send the invoice file to the above email address as an attachment. The support team can test your invoice and help you understand the error notifications.

WELCOME TO COUNSELLINK!