

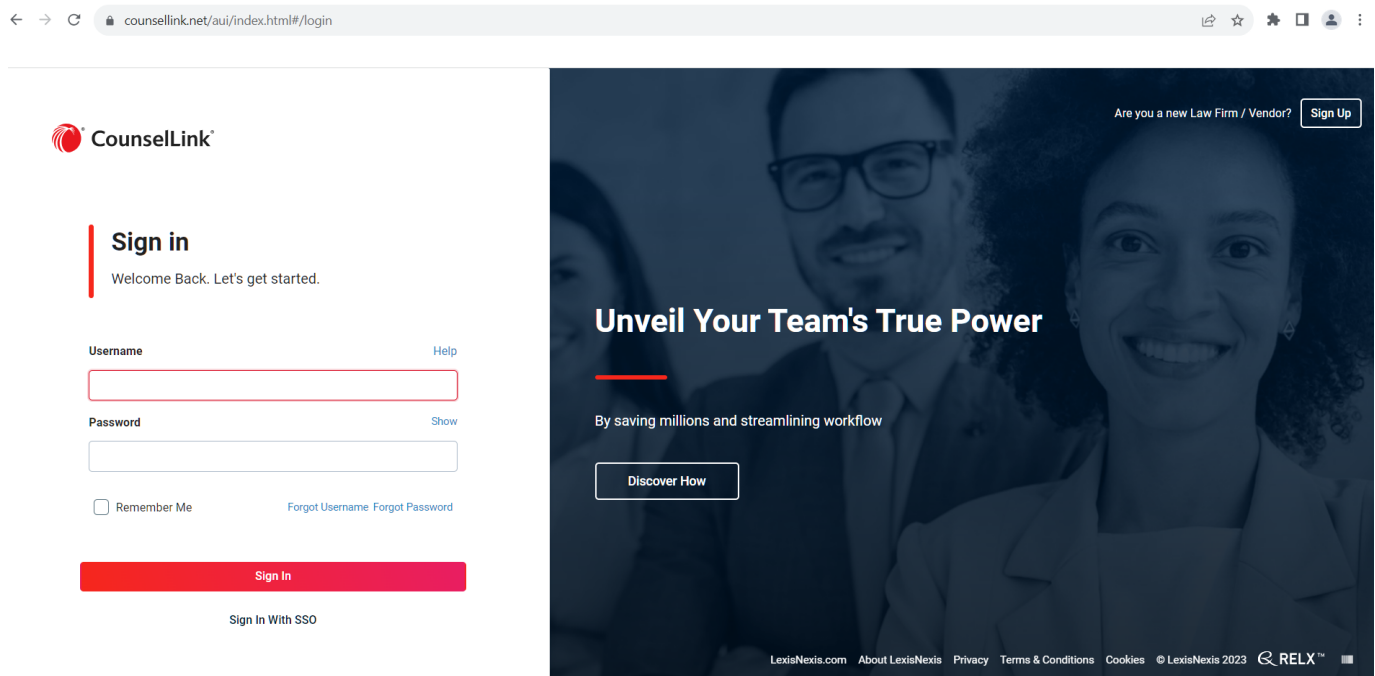
1. CounselLink Registration

Already registered with CounselLink?

If you already have a CounselLink account, you do not need to complete the registration process again. You can skip to the instructions set forth in the PDF entitled: "[2. Adding Timekeepers, Submitting an Offer, Approve Guidelines](#)"

If you are not already registered with CounselLink, you need to create a new registration

Register your law firm with CounselLink by following the instructions below. If you need assistance with the registration process, please 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 *
Test Law Firm

Firm Type *
Legal Services

Client Name *
Test

Where is your firm located?

Country *
UNITED STATES

Street Address *
123 ABC
Street Address, Building, Apt., Floor, Suite, etc.

City *
San Diego

State * (US Only)
California

Zip/Postal Code *
92111

Telephone *
888 888 8888

Extension (Optional)

Fax (Optional)

Remit payment to a different address

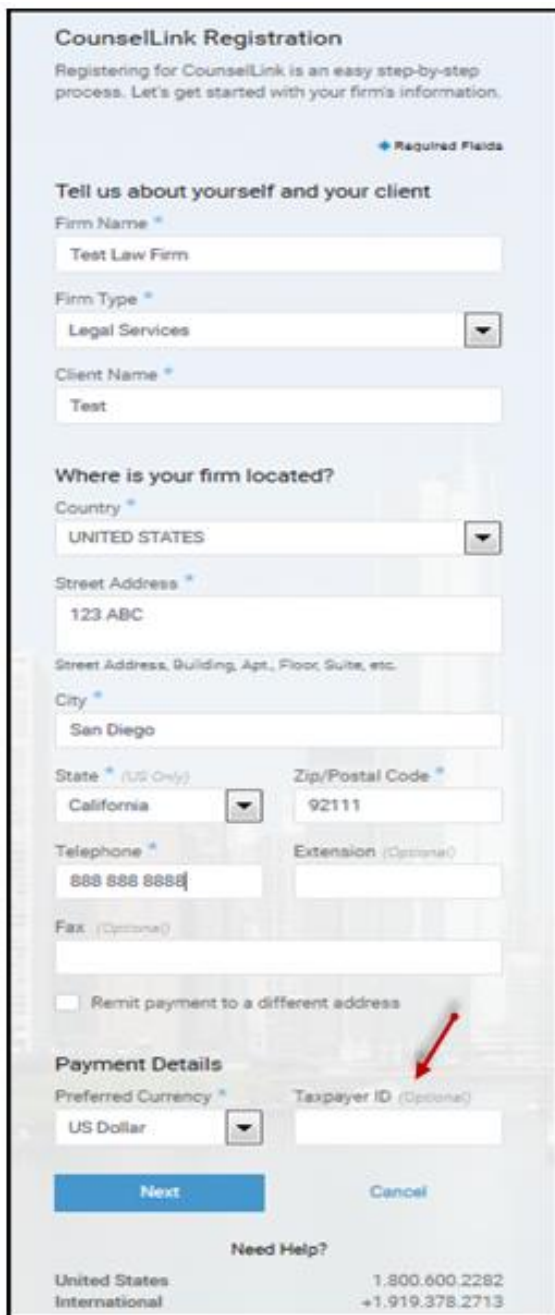
Payment Details

Preferred Currency *
US Dollar

Taxpayer ID (Optional)

Next [Cancel](#)

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 *
[Empty field]

Last Name *
[Empty field]

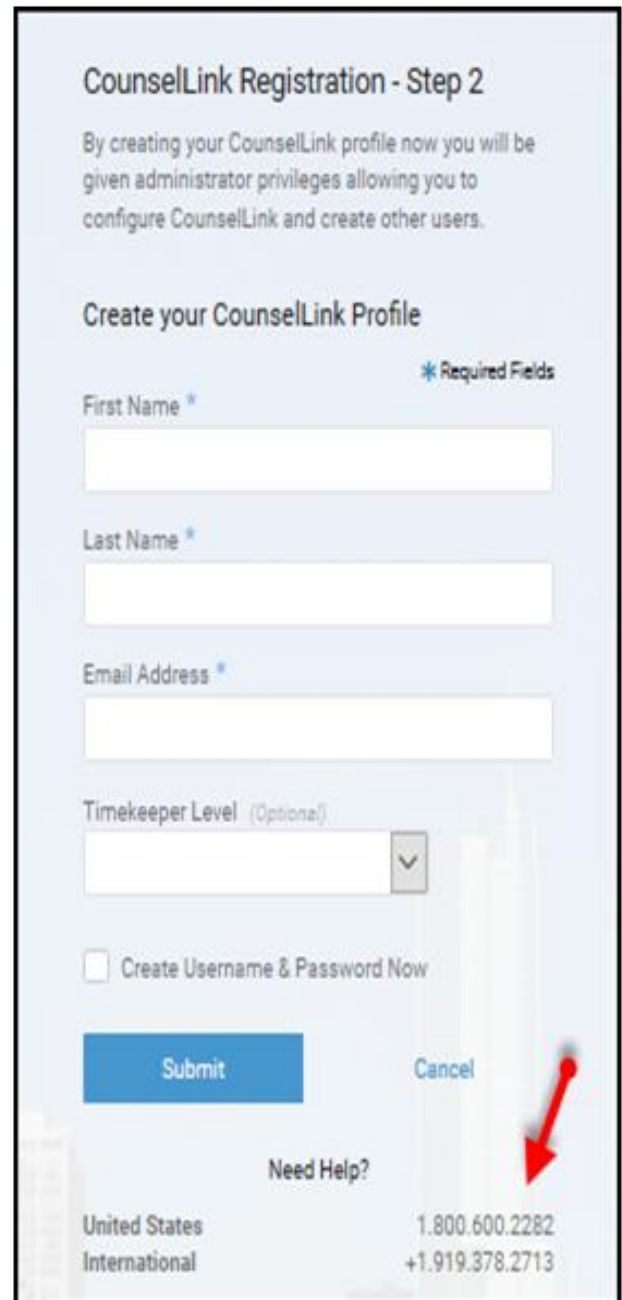
Email Address *
[Empty field]

Timekeeper Level (Optional)
[Dropdown menu]

Create Username & Password Now

Submit [Cancel](#)

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.

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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:

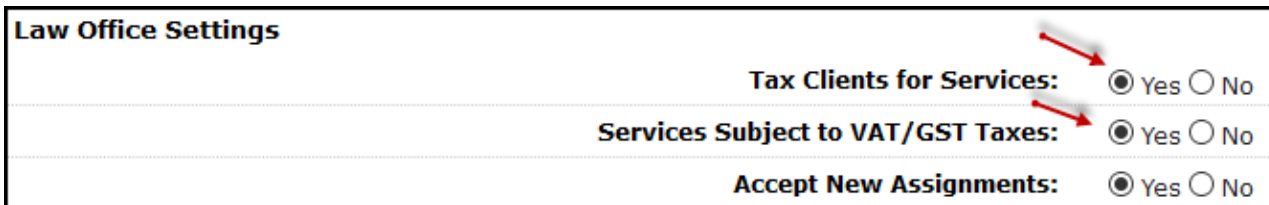
- Clicking the link under **Offices**
- Click the first **Edit** button
- Enter the number and click **Save**



The screenshot shows a form titled "Address Information" with two buttons at the top: "Save" and "Cancel". Below the title, there is a label "Taxpayer ID:" followed by an empty text 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 a form titled "Law Office Settings" with three rows of radio button options. Each row has a label and two radio buttons: "Yes" (selected) and "No". Red arrows point to the "Yes" radio buttons in the first two rows.

Tax Clients for Services:	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Services Subject to VAT/GST Taxes:	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Accept New Assignments:	<input checked="" type="radio"/> Yes	<input type="radio"/> No

Your Registration is now complete.

You now need to contact [Keith Bruni <attorneyimplementation@lexisnexis.com>](mailto:attorneyimplementation@lexisnexis.com), and ask him to link your account with CATIC's account.

Once the accounts are linked, please go to the PDF entitled: "2. Adding Timekeepers, Submitting an Offer, Approve Guidelines".