LexisNexis® Account Center

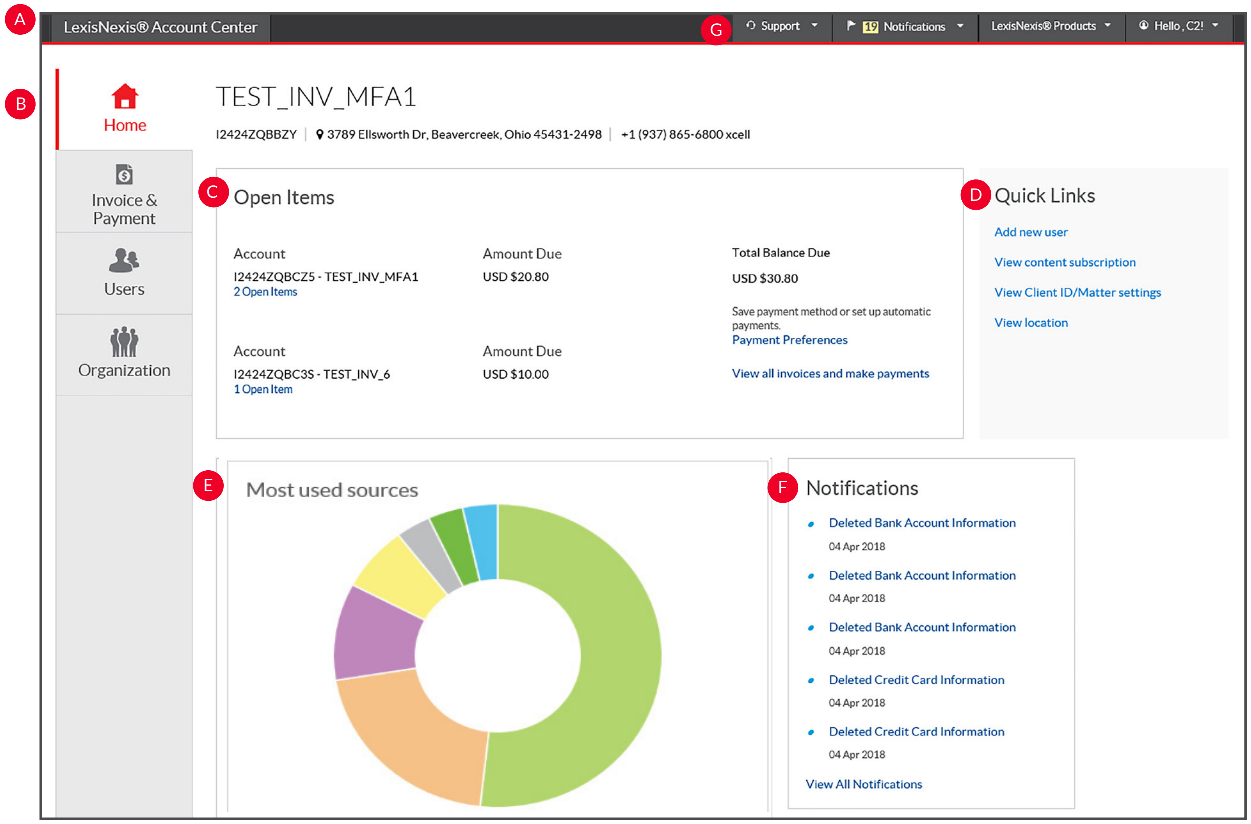
LEXISNEXIS® ACCOUNT CENTER USER GUIDE

This guide shows you where to find—and how to use—LexisNexis® Account Center features you'll use often. Keep this guide handy for reference.

Contents

*Please note: All screens shown may change slightly as new sources, features and enhancements are added. Please contact your Account Rep with any questions.

Getting Started: Home



The LexisNexis Account Center Home page gives you access to all your account tasks, plus at-a-glance information about important areas of your account.

- A The global **Navigation Bar** provides access to *Support options, Notifications, LexisNexis Products, and Sign in Profile options.*
- B The left **Navigation Bar** provides access to *invoices and payments, users, and organization information.*
- C The **Open Invoices** pod provides access to *pay an invoice, review open invoices, or set up payment preferences* such as a credit card or bank account.
- D The **Quick Links** pod on the right side of the page provides quick access to *frequently-used tasks.*
- E The **Usage** pod graphically depicts the *most used sources* for the organization.
- F The administrator will receive **notifications** for changes to payment information such as delete credit card, *delete bank account, update credit card and update bank account.*
- G The **Support** section contains options for contacting Customer Support as well as *Help* and *online tutorials.*

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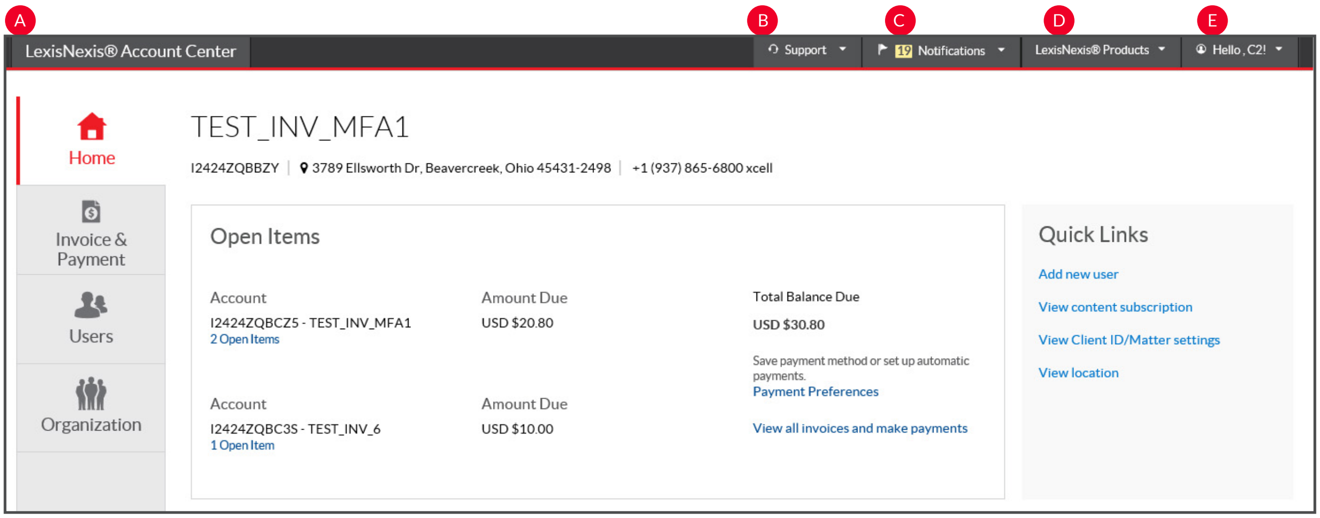
Getting Started: Global Navigation Bar



- (A) **LexisNexis Account Center**. Click to return to the LexisNexis Account Center Home page.
- (B) **Support**. Click the drop-down menu to view the Customer Support phone number, access Help screens, and provide feedback or suggestions.
- (C) **Notifications**. The administrator will receive notification for changes to payment information such as delete credit card, delete bank account, update credit card and update bank account.
- (D) **LexisNexis Products**. Click the drop-down menu to access additional LexisNexis products.
- (E) **Hello, admin!** Click the drop-down to edit profile information and sign out.

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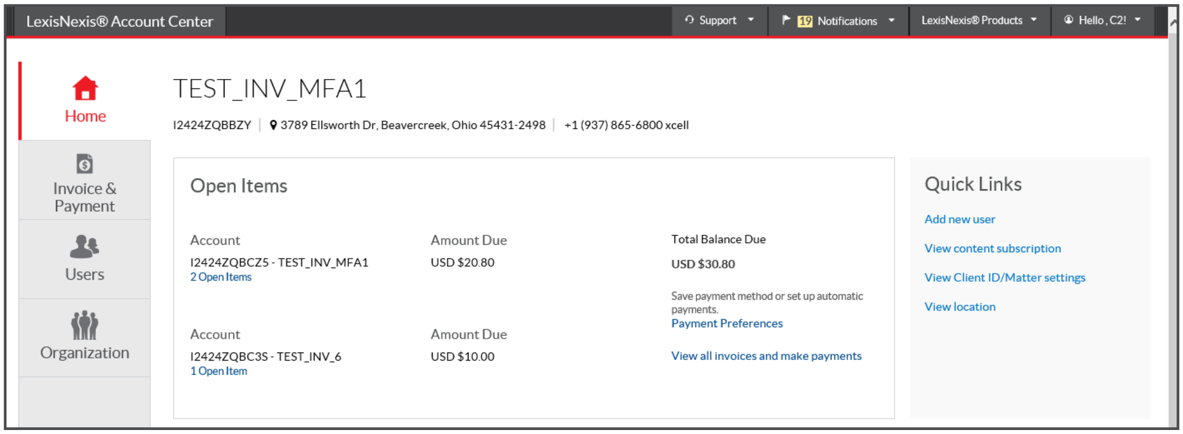
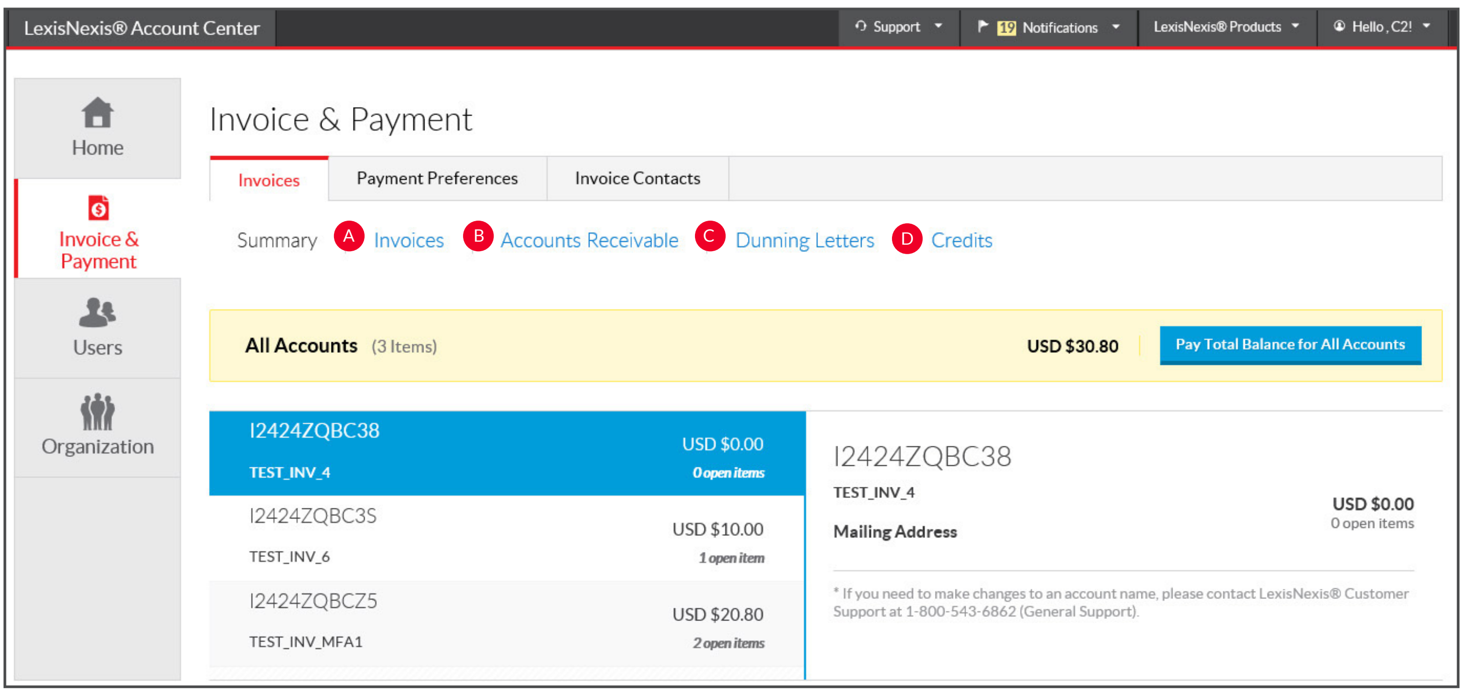
Invoice & Payments

Accessing Invoice & Payments

This information can be accessed through the Open Items pod or from the Invoice & Payments tab on the left navigation bar.





- **A** **Invoices**. Use this page to view your invoices, view or print a PDF of an invoice or tax statement, and make payments.
- **B** **Accounts Receivable.** This page allows you to view or print accounts receivable statements. You may also request an accounts receivable statement here.
- **C** **Dunning Letters**. Use this page to view or print Dunning Letters for your account.
- **D** **Credits**. View or print credit memos for your account.

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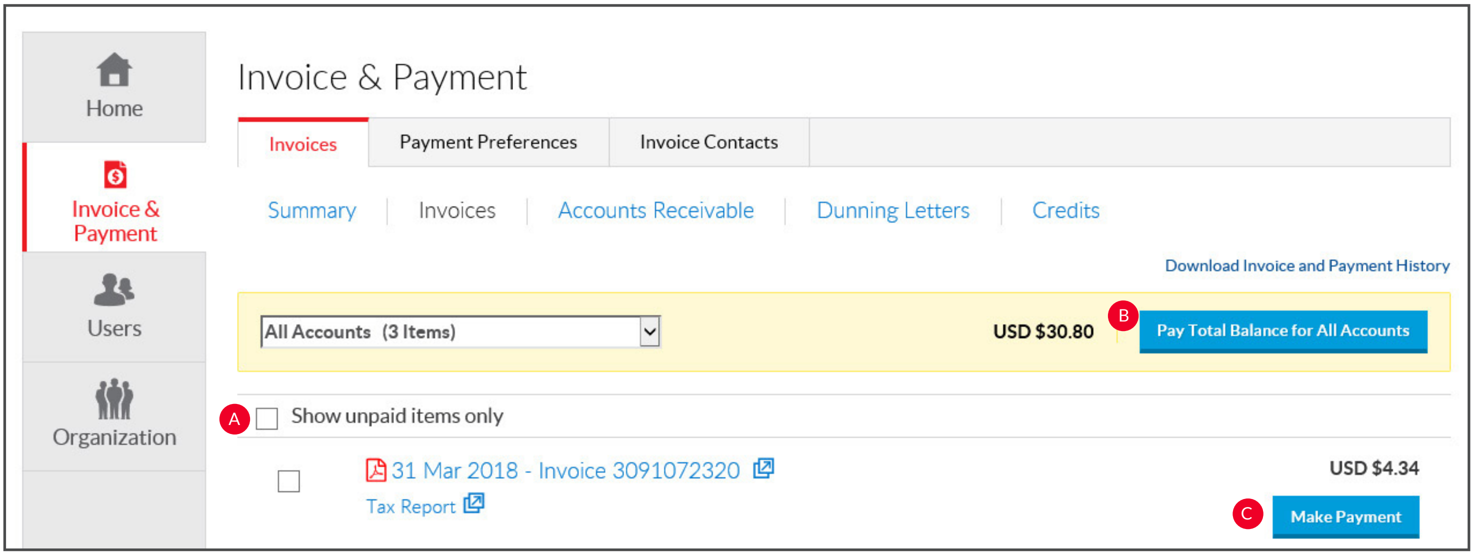
Invoice and Payments: Invoices

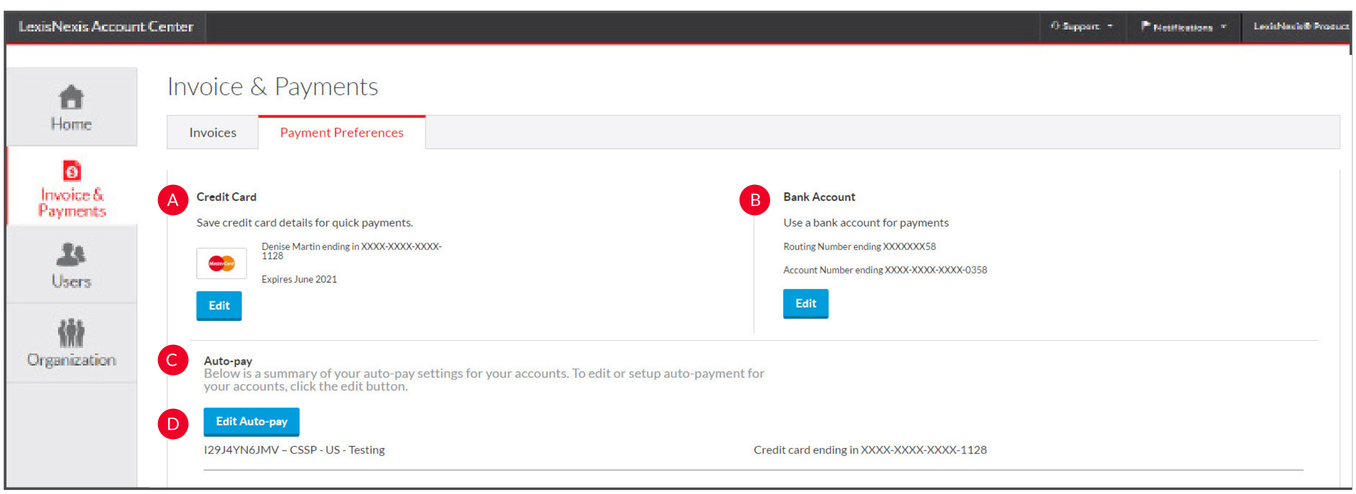


A **Show unpaid tems only.** Select this checkbox to see only open invoices.

B **Pay Total Balance for all Accounts**. Select this button to pay the entire amount owed for all accounts.

C **Make Payment**. Select this button to pay specific invoices or multiple invoices.

Invoice and Payments: Payment Preferences



Use this page to save a credit card or bank account to use when paying invoices, or to set up automatic payments.

A **Credit Card**. Select this to save or edit a credit card for making payments.

B **Bank Account**. Select this option to save or edit a bank account for making payments.

C **Auto-pay**. View summary of auto-pay settings for your account.

D **Edit auto-pay**. Click this button to edit or set up auto-payment for your account.

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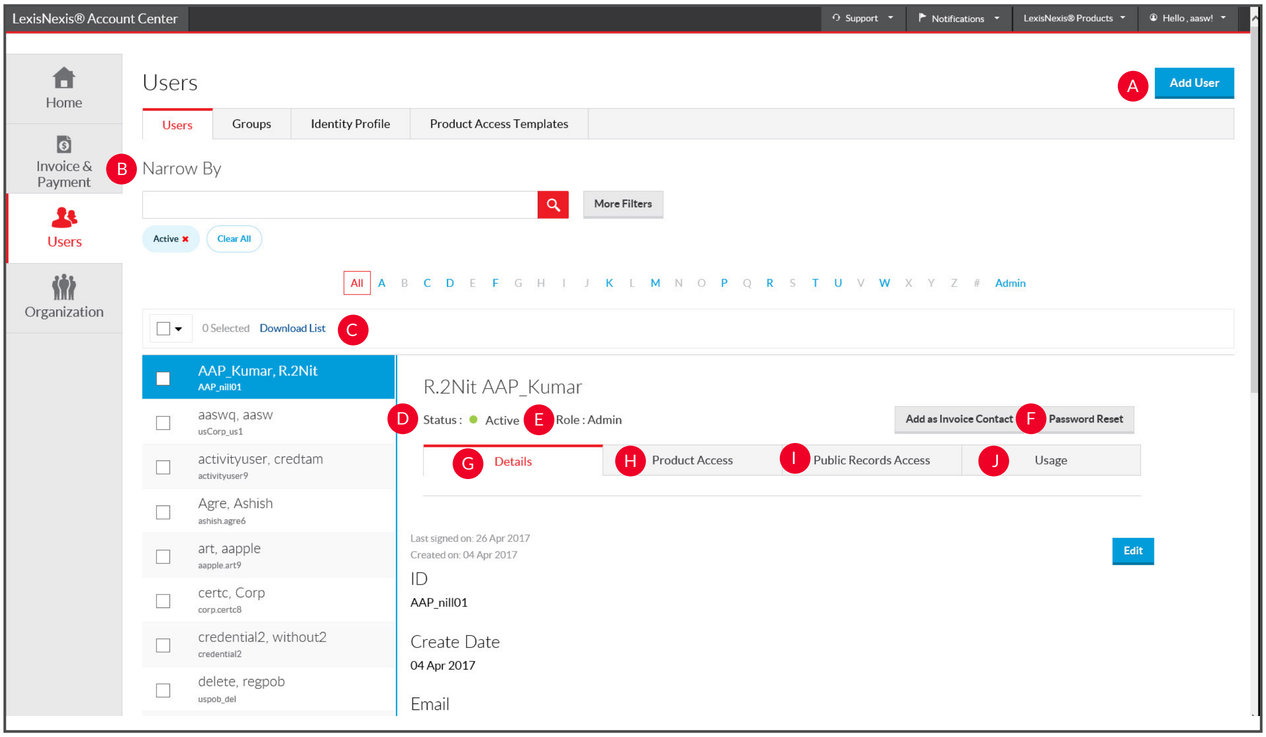
Users



Use this page to manage users within your organization.

- (A) **Add User**. Select this to add a new user to your organization.
- (B) **Narrow By**. Search by name or ID. Use one or more of the filters in this area to narrow your search.
- (C) **Download List**. Select this to download the complete list of users.
- (D) **Status**. Select this drop-down list to change the status.
- (E) **Role.** Select this drop-down to change user's role. Choices include end user and admin.
- (F) **Reset Password**. Select this to issue the user a new temporary password.
- (G) **Details**. Select this tab to view and edit the general information for the user.
- (H) **Product Access**. Select this tab to view and edit the user's product access.
- (I) **Public Records**. Select this tab to view and edit the user's public records access.
- (J) **Usage**. Select this tab to display usage information for the user.

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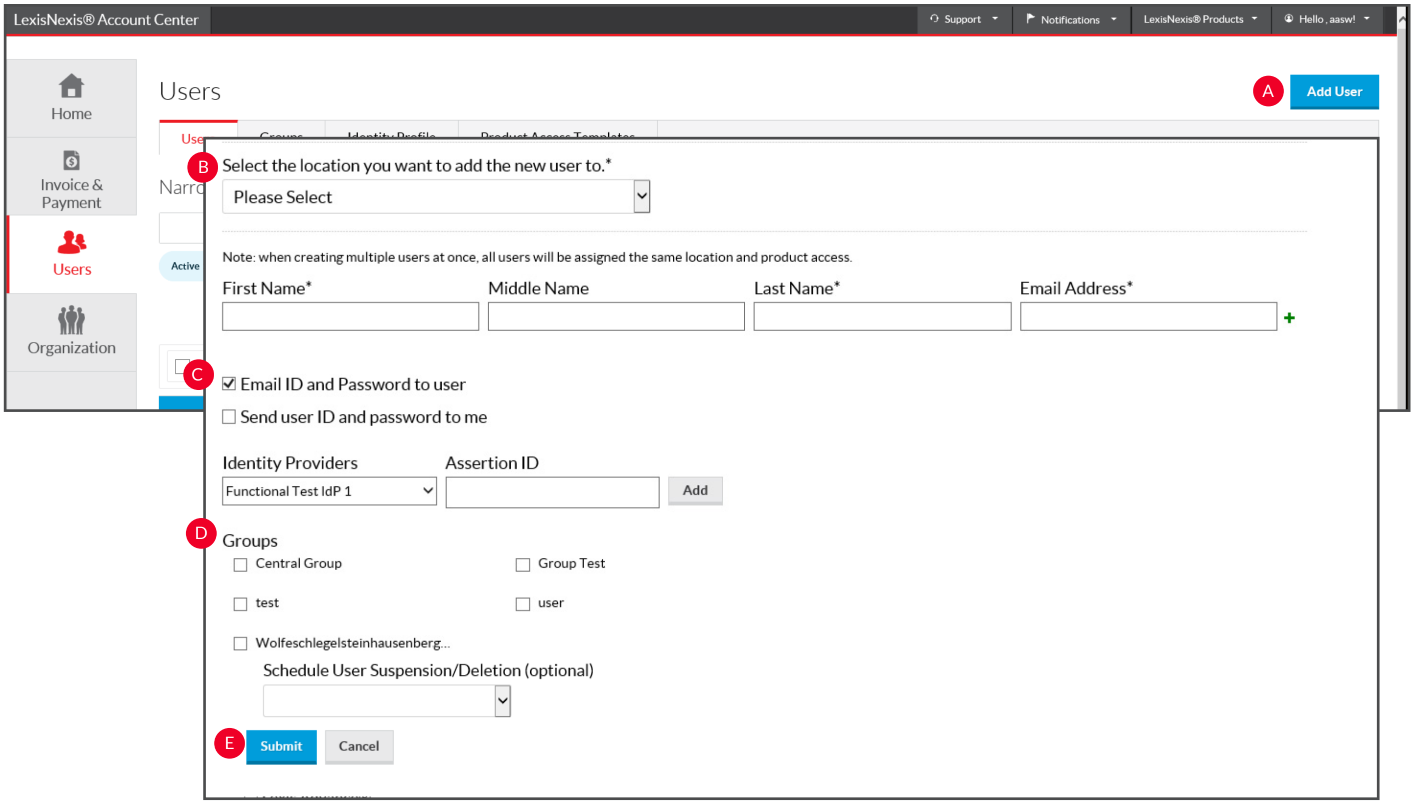
Users: Add User



A **Add User.** Click the Add User button.

B **Details**. Insert required information (identified by an asterisk).

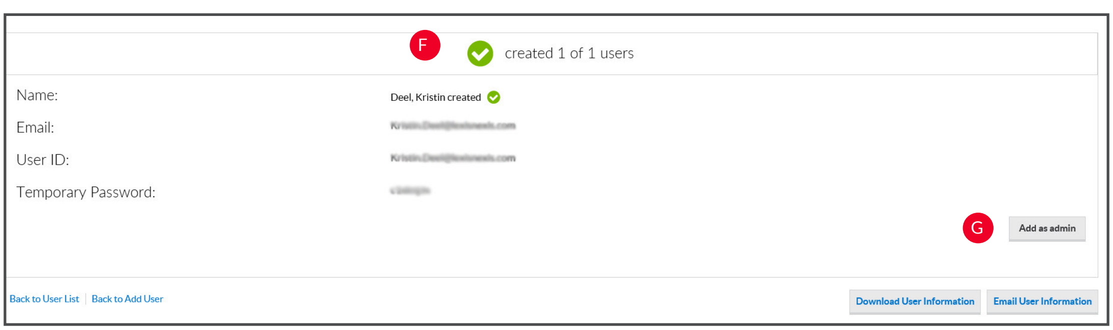
C **Delivery Option.** Select desired deliver option. By selecting either of these, an email will be sent to the selected party. You are not required to select a box. This ID and temporary password will be displayed on the confirmation screen.

D **Groups.** Select which group to add the user. .

E **Submit**. Click Submit.

F **Confirmation Screen**. This screen instantly provides the created user's ID and temporary password, which can be downloaded or emailed to the administrator.

G **Add as admin**. Click this button to allow the end user to be created as an administrator.



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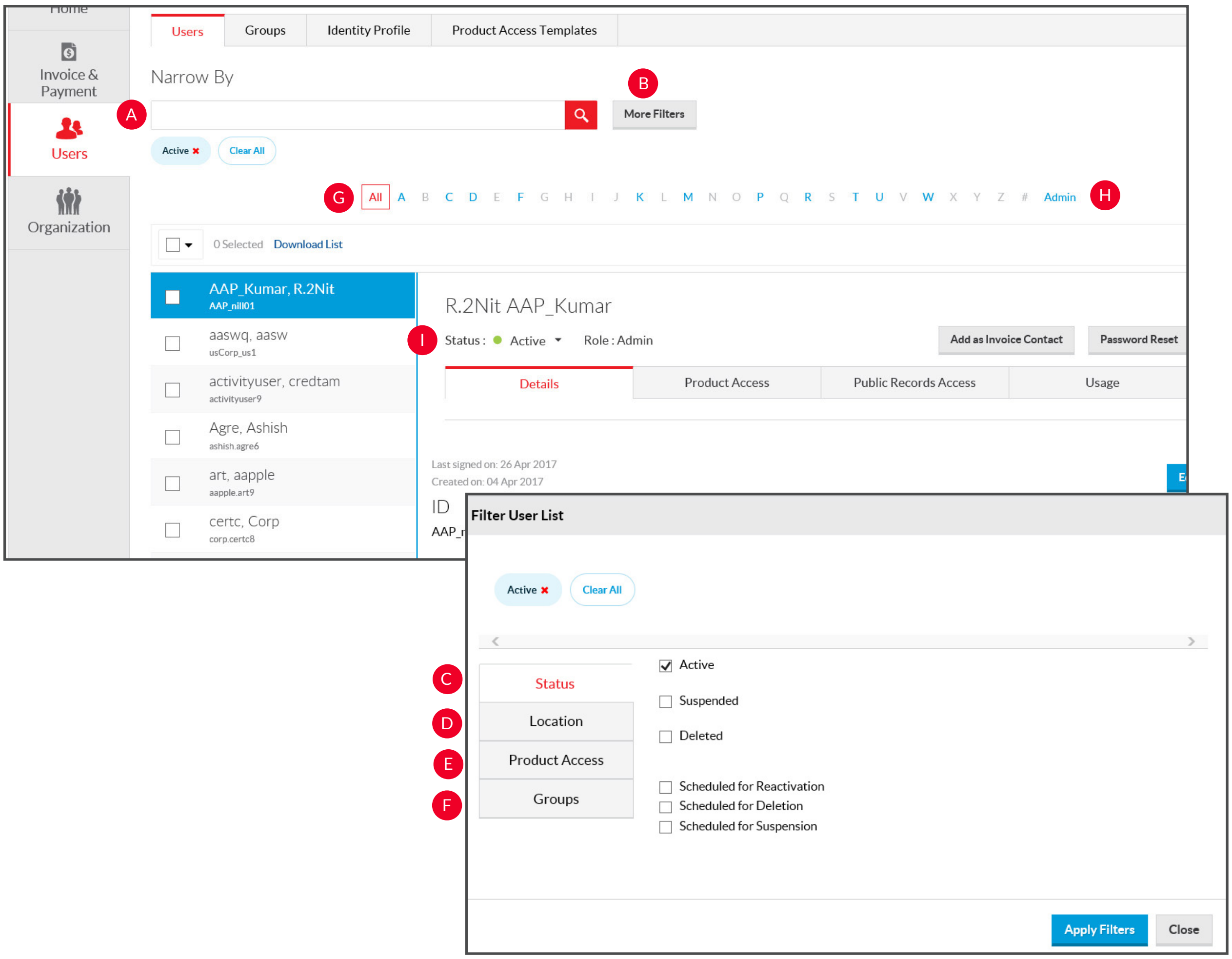
Users: Narrow By



- (A) **Search by Name or ID**. Enter the name or user ID of the user whose information you want to find. Separate multiple names or IDs with a semicolon.
- (B) **More Filters.** Click this button for more filtering options.
- (C) **Status**. Select from this drop-down to narrow your search to users with a specific status (active, suspended, or deleted).
- (D) **Location**. Select from the location pull-down filter to narrow your search to users at a specific location.
- (E) **Product Access**. Select from the product access pull-down filter to narrow your search to users who do or do not have access to specific products.
- (F) **Groups**. Select the pll-down menu to narrow your search to users in a specific group.
- (G) **All/A..Z**. Use the alphabet list to filter on the user's last initial.
- (H) **Admins**. Select this button to display a list of users who are administrators.
- (I) **Active users**. The list is defaulted to view only users with active status.

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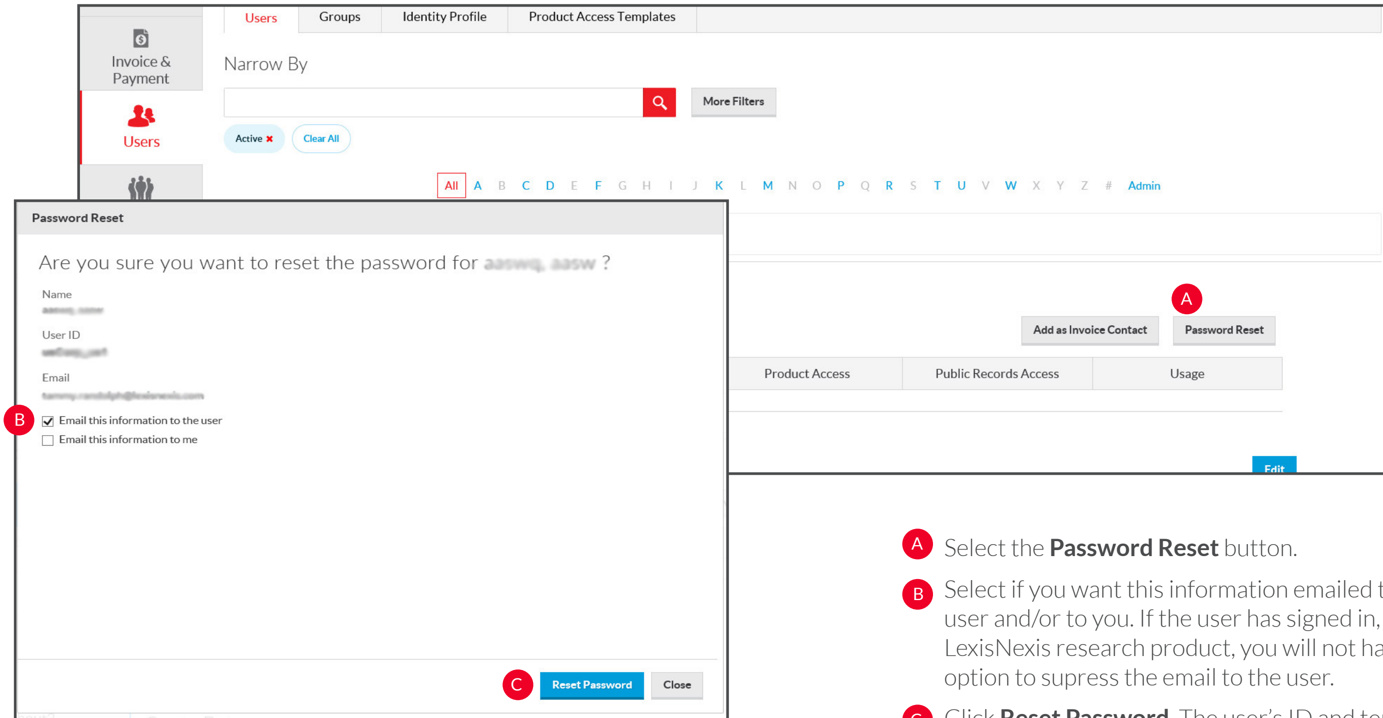
Users: Reset Password

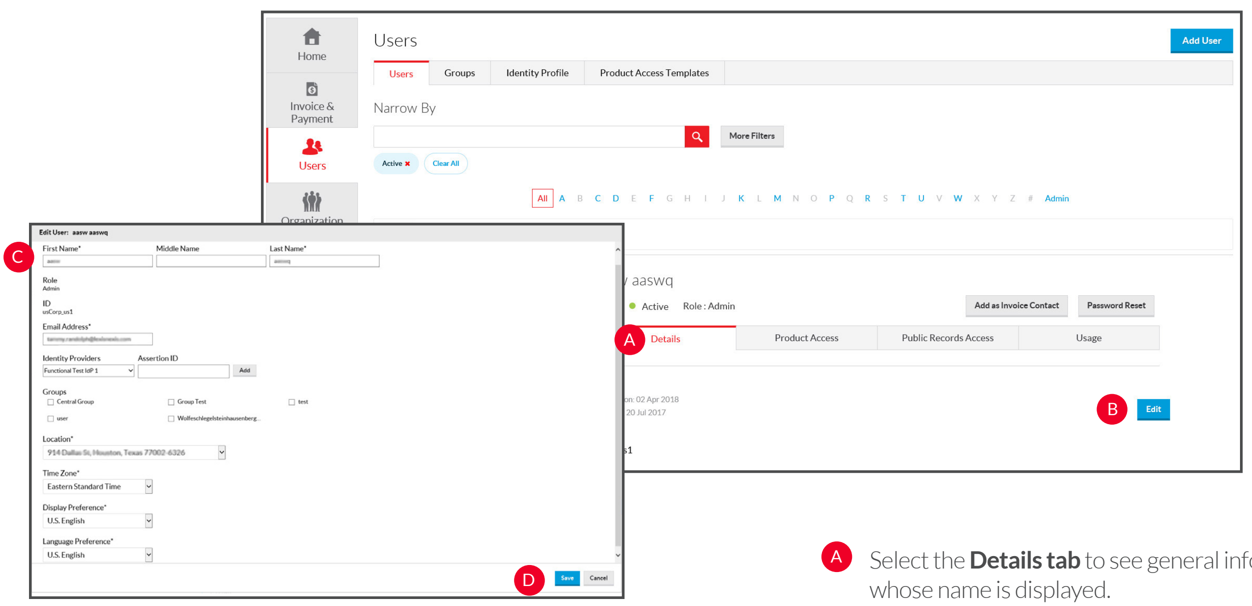


A Select the **Password Reset** button.

B Select if you want this information emailed to the user and/or to you. If the user has signed in, to any LexisNexis research product, you will not have the option to supress the email to the user.

C Click **Reset Password**. The user's ID and temporary password will then display.

Users: Edit User Details



A Select the **Details tab** to see general information for the user whose name is displayed.

B Click the **Edit button** to edit the information for the user whose name is displayed.

C **Edit.** Make changes.

D Click **Save**.

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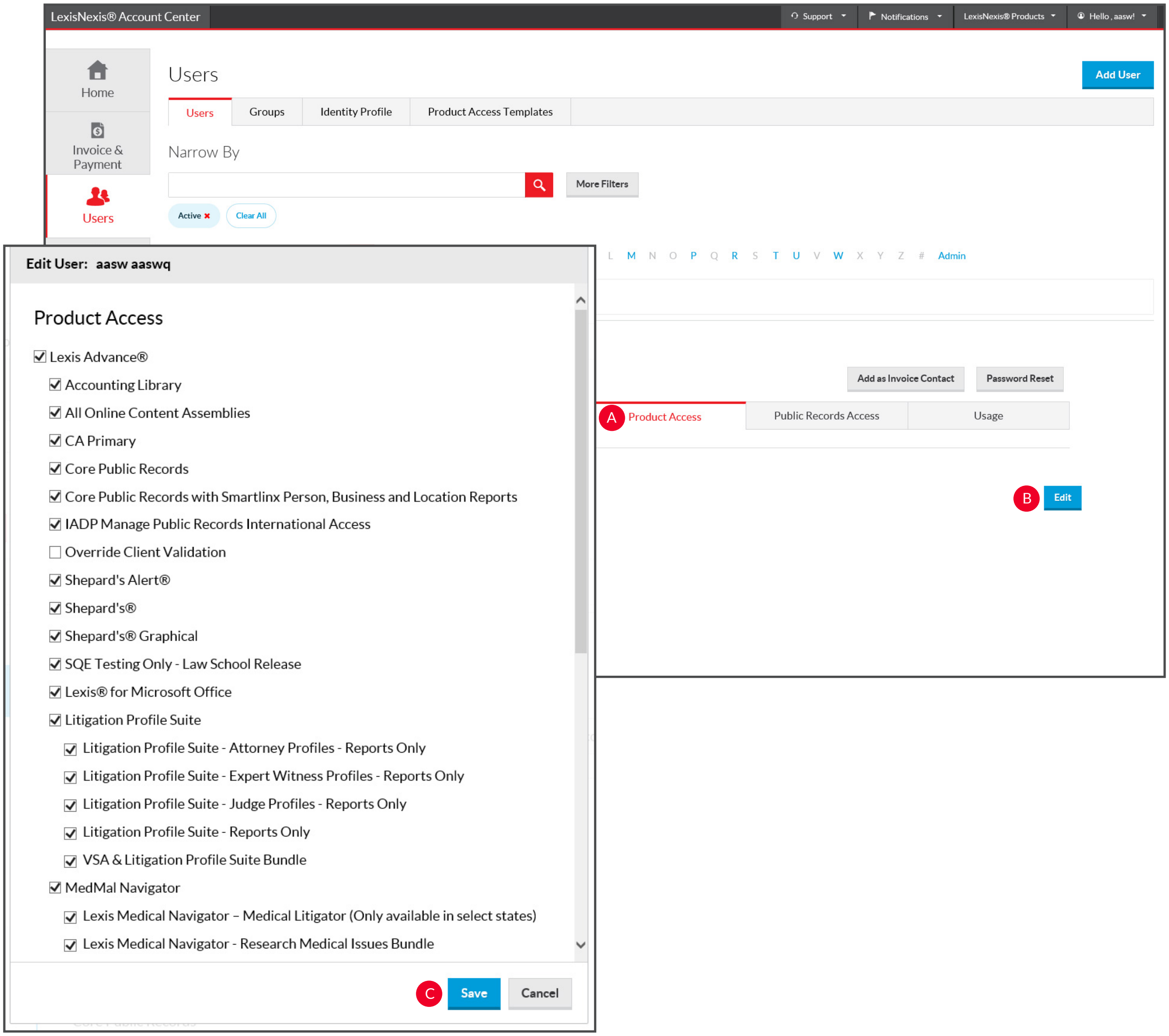
Users: Product Access



A **Product Access**. Select this tab to see the products that the user whose name is displayed has access to.

B **Edit button**. Select this to edit product access for the user whose name is displayed.

C **Save changes.** Make desired changes using the checkboxes and then click Save.

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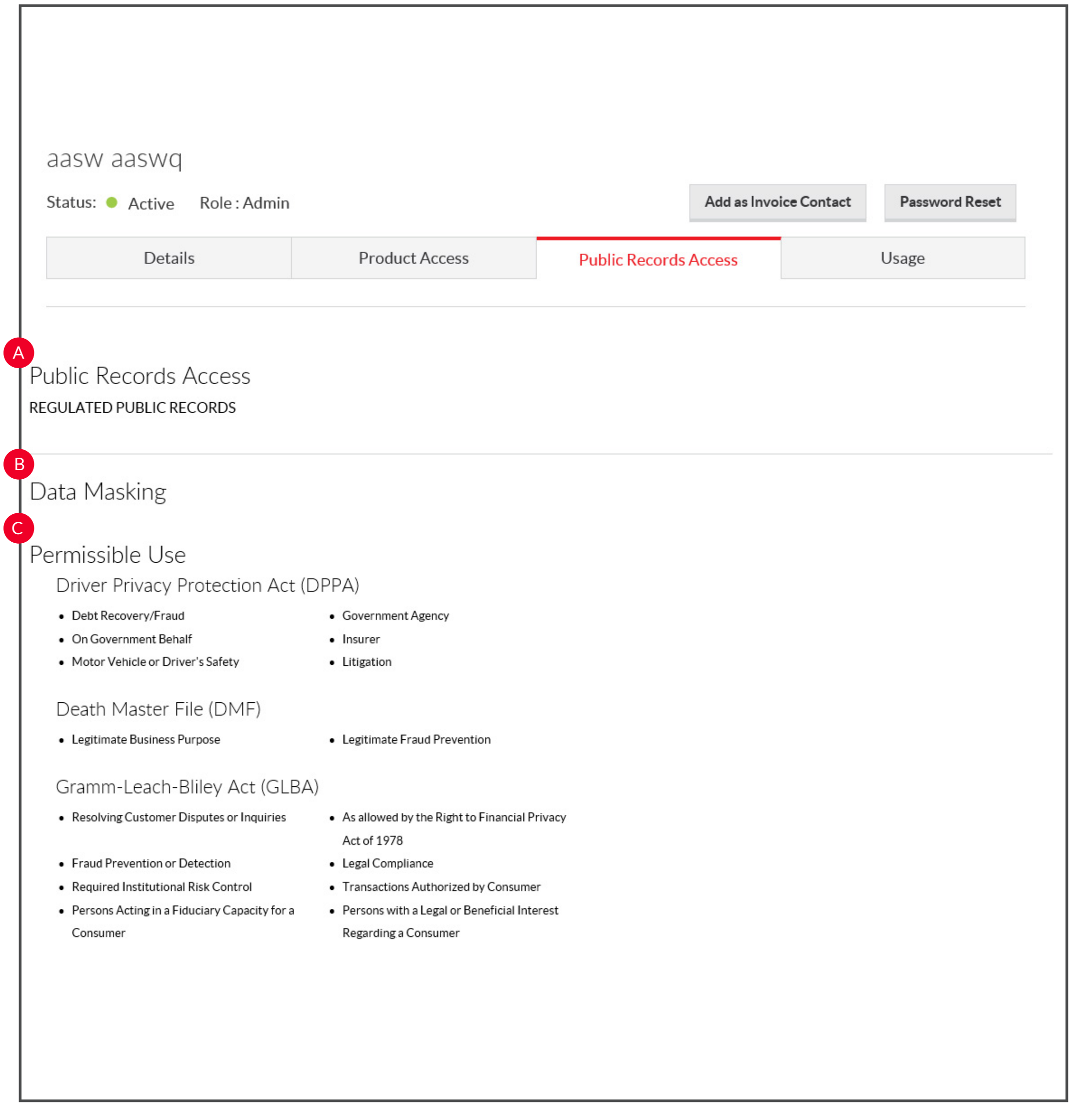
Users: Public Records



Select this tab to see the public records access information for the user whose name is displayed.

A **Public Records Access.** Indicates the Public Records type the user has access to (regulated, unregulated or no public records access).

B **Data Masking**. Indicates the data that will be masked for the particular user within their public records research.

C **Permissible Use**. Indicates the reason the user is able to access public records material.

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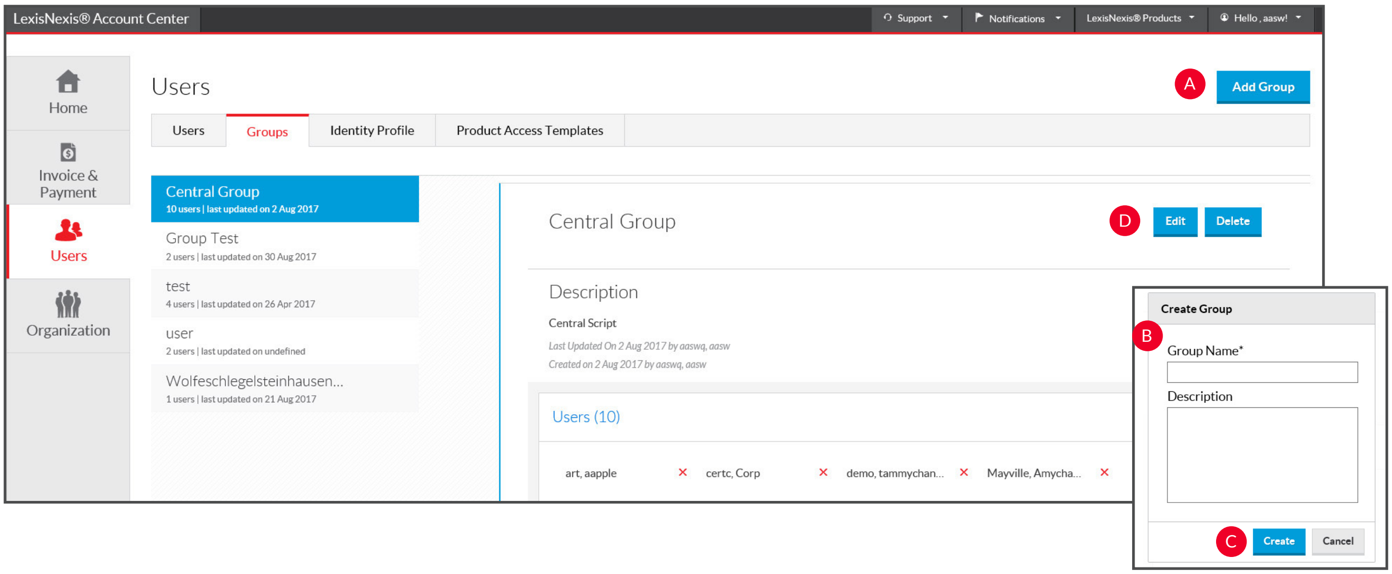
Users: Add Group



A **Add Group.** Click on this button to add a group.

B **Enter Name.** Enter a name and description for the group.

C **Save or Create**. Either select save or create with users.

D **Edit or Delete.** Use these buttons to edit group name / description or to delete a group.

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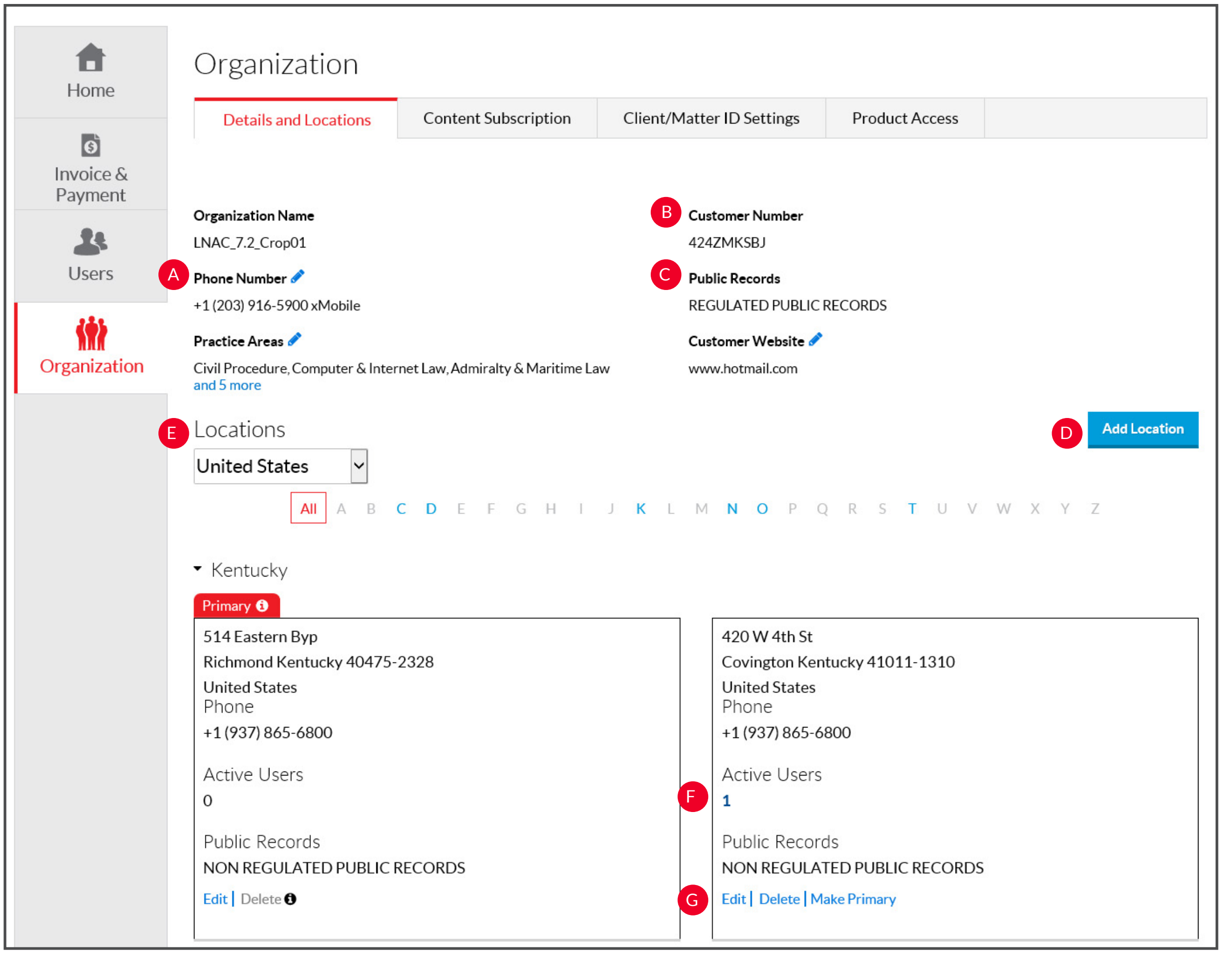
Organization: Location Details



You may review and manage the locations (places of business) for your organization.

- A **Phone number**. Displays the phone number for your organization. This may be edited by clicking on the pencil icon.
- B **Customer Number**. The Customer Number is your account identifier.
- C **Public Records**. The public records access level for your organization.
- D **Add Location**. You can add a new location to an account.
- E **Locations**. The address(es) for the place(s) of business for your organization.
- F **Active Users**. Selecting this hyperlink takes you to the list of active users at this location.
- G **Edit or Delete**. You can delete a location from your organization using the corresponding buttons.

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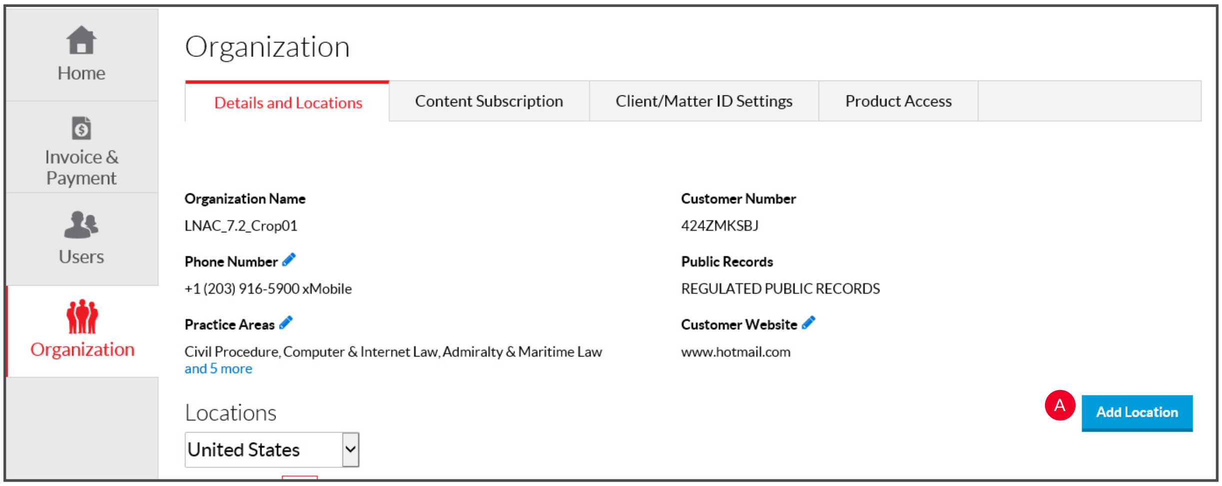
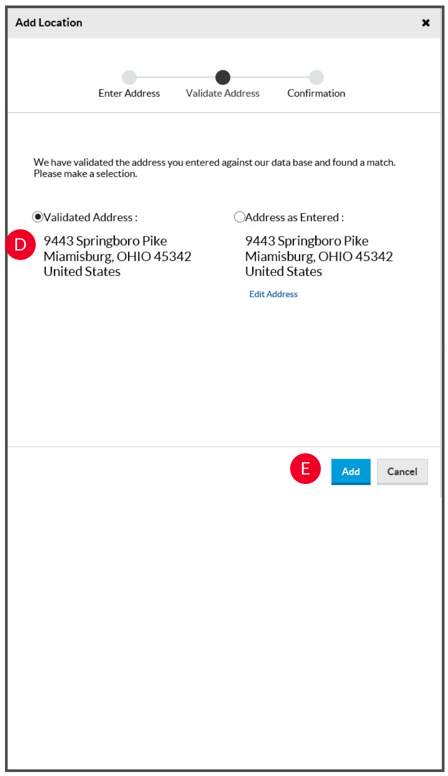
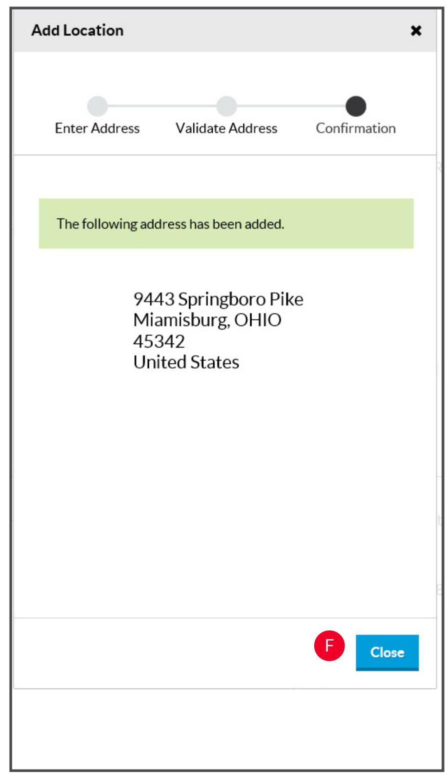
Organization: Add Location







You can add a new location to an account through LexisNexis Account Center.

- A Select the **Add Location** button.
- B **Complete the required fields**, indicated by an asterisk.
- C Select **Next**.
- D **Validate** address.
- E Select **Add**.
- F **Confirm** address by selecting **Close**.

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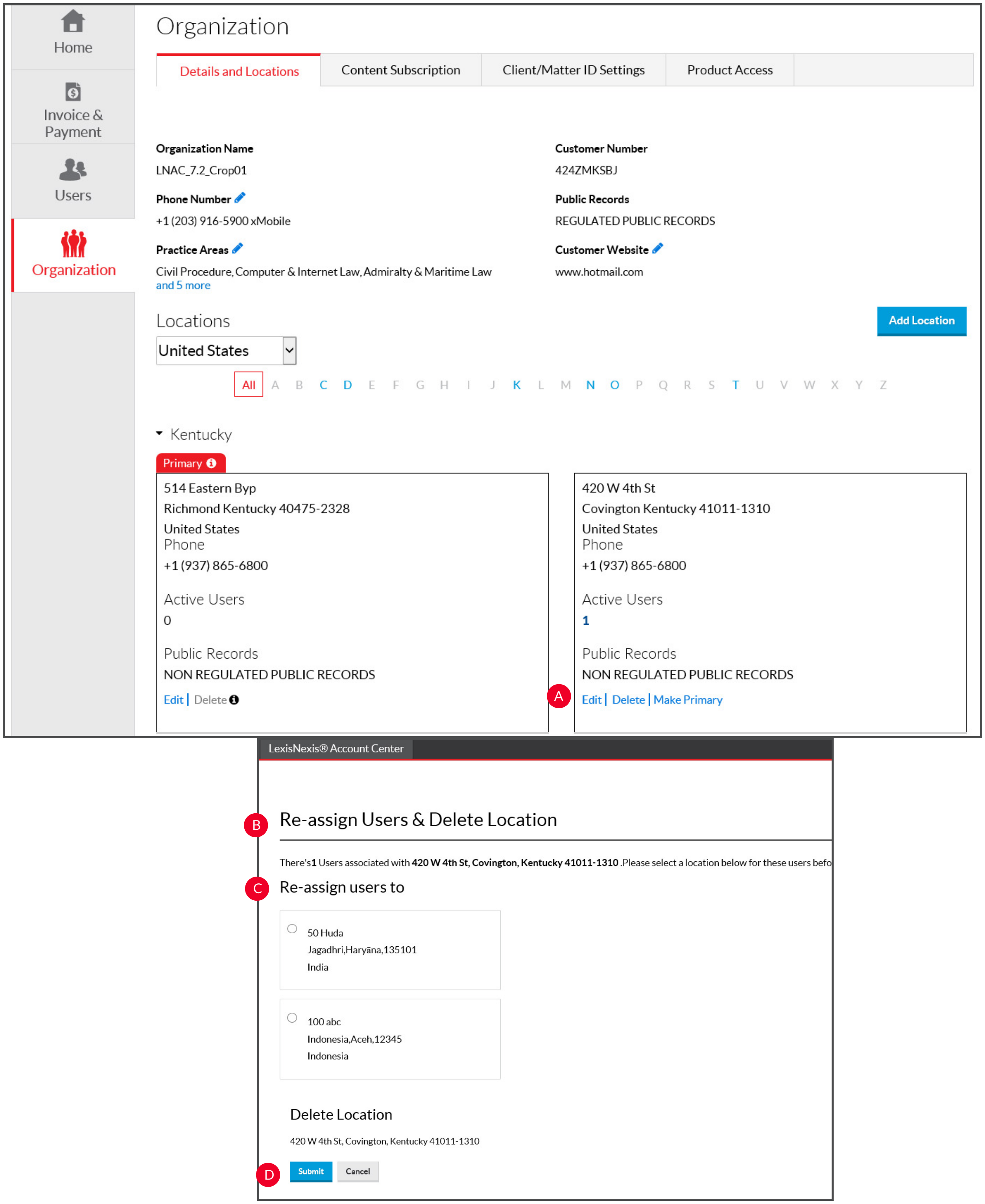
Organization: Delete Location



You can delete a location from your organization through LexisNexis Account Center.

A Identify the location you want to delete and click the **Delete** link.

B The **re-assign users and delete location page** will pop up, indicating the number of users that must be assigned to a new location.

C Select the new location you want to assign the users to.

D Select **Delete** under delete location.

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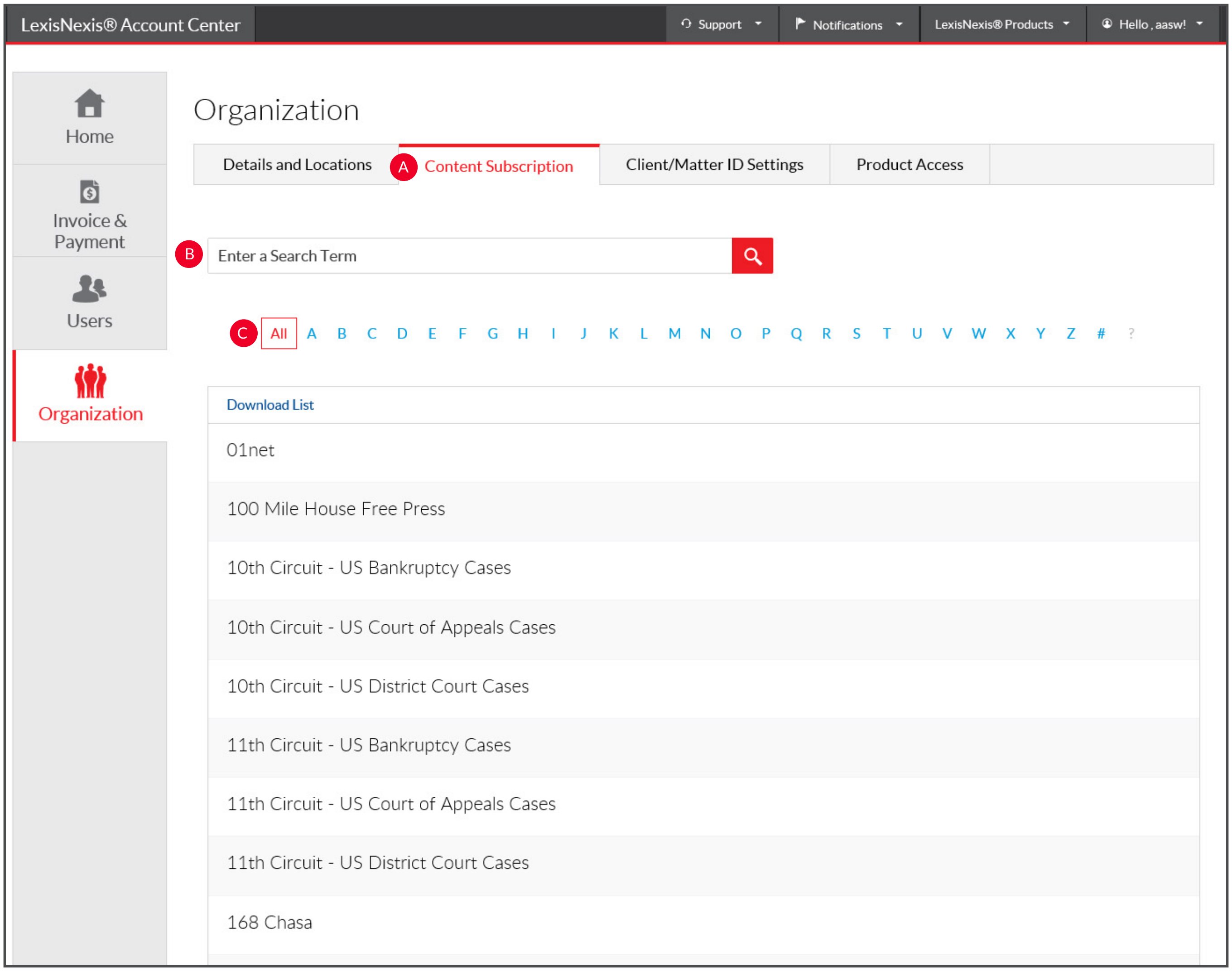
Organization: Content Subscription



You can view and download the list of publications your organization is subscribed to or search for a specific publication through LexisNexis Account Center.

A Select the **Content Subscription** tab.

B **To find a specific publication, do one of the following:**

-Enter the name (or part of a name) in the **search box** and select the Search button to find a publication.

C -Use the **alphabetical list** to search for a publication alphabetically.

-Select a **page number at the bottom of the page** to display the next group of publications or use the **right and left arrows** to page through the list of publications.

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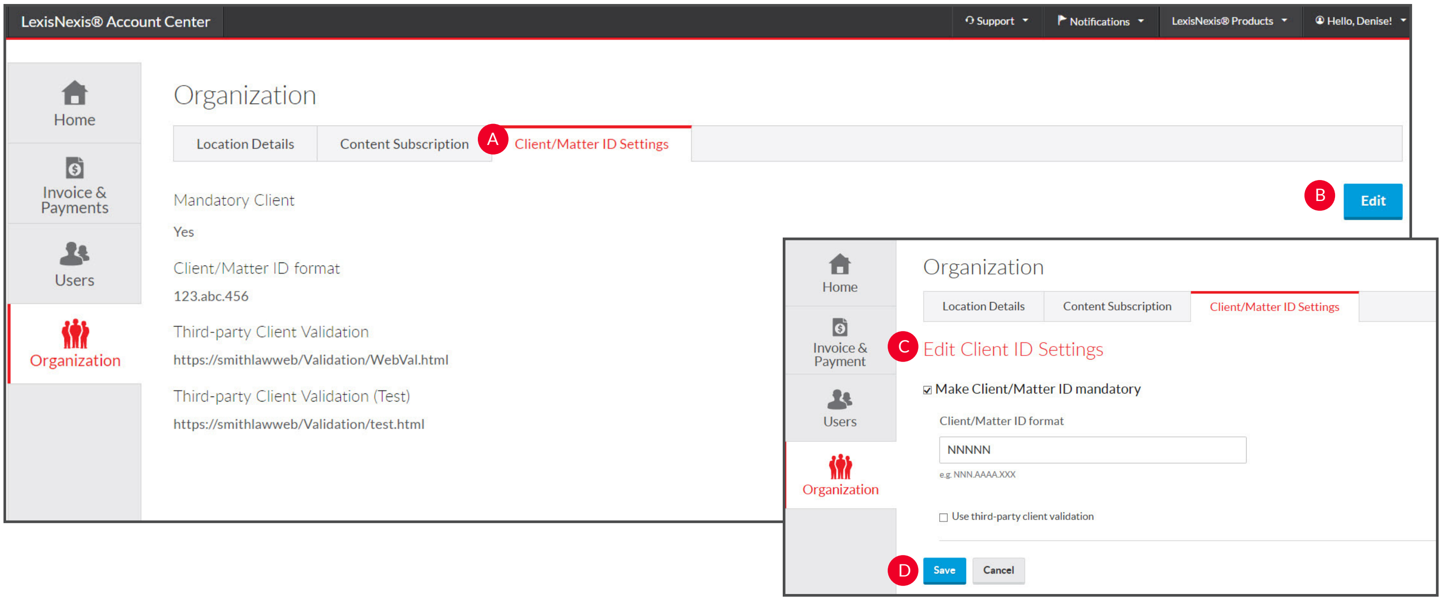
Organization: Client Matter



You can set or change the Client ID settings for your organization through LexisNexis Account Center.

- A Select the **Client/ID Matter Settings** tab**.**
- B Select the **Edit** button.
- C **Edit settings** as needed (see the chart below for more information).
- D Click **Save.**

Value	Description
Client ID mandatory	Select this to require users for this organization to set a Client ID when signing in to LexisNexis® Account Center.
Client/Matter ID format	Enter the format the client/matter ID must conform to. • N - means 0-9 is required • X - means 0-9 and A-Z are acceptable • A - means A-Z is required • B - means a blank is required The identifier you enter must match the displayed format character for character. For example, if the displayed format were XXXB##-##, you would have to enter a 9-character identifier consisting of 3 alphanumeric characters, followed by a blank, 2 numeric characters, a hyphen, and 2 more numeric characters.
Use third-party validation	Select this if you are using a software-based client validation application such as LexisNexis® Cost Recovery Manager, Lookup Precision, Research Monitor, or OneLog.
Client Validation URL	If you are using a URL-based client validation application, enter the URL here.
Test URL to enable client validation (optional)	If you are using a URL-based client validation application, enter the URL here.

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