LexisNexis®
Account Centre
User Guide

Please note: All screens shown may change slightly as new features and enhancements are added.

Log in:
www.advance.lexis.com/nz

Learn in:
www.knowledge-network.lexisnexis.com.nz/home/
This guide shows you where to find—and how to use—LexisNexis® Account Centre features you’ll use often. Keep this guide handy for reference.

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Browser Compatibility
The supported browsers and operating systems are the same as Lexis Advance.

Platform:
• Windows 7
• Windows 8.1
• Windows 10
• Mac OSX

Browser:
• IE11, Edge
• Chrome (latest version)
• Firefox (latest version)
• Safari 8 & 9

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The LexisNexis Account Centre home page gives you access to all of your actionable 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 your Profile options.

(B) The left **Navigation Bar** provides access to Invoices and Payments, Users, and Organisation information.

(C) The **Open Invoices** pod provides access to pay an invoice, review open invoices, or set up credit card payment preferences.

(D) The **Quick Links** pod on the right side of the page provides quick access to frequently used tasks.

(E) The **Notifications** pod is where the administrator receives notification for changes to payment information such as deleted and updated credit cards.

(F) The **Support** pod contains options for contacting **Customer Support** as well as **Help topics** and **Online tutorials**.

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Getting Started: Global Navigation Bar

(A) **LexisNexis Account Centre.** Click to return to the LexisNexis Account Centre 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 deleted and updated credit card information.

(D) **LexisNexis Products.** Click the drop-down menu to access LexisNexis products e.g. Lexis Advance and LexisNexis Practical Guidance.

(E) **Hello, User!** Click the drop-down to edit profile information and sign out.

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Invoices and Payments

Accessing Invoice & Payments

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

(A) Summary. This page only appears if there are multiple financial accounts to choose from.

(B) Invoices. Use this page to view your invoices, view or print a PDF of an invoice and make payments.

(C) Accounts Receivable. This page allows you to view or print accounts receivable statements. You may also request an accounts receivable statement here.

(D) Dunning Letters. Use this page to view or print Dunning Letters for your account.

(E) Credits. View or print credit memos for your account.

(F) Multiple Financial Accounts. Drop down option to select from multiple financial accounts from the Invoices view.

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Invoices and Payments: Invoices

(A) **Show unpaid invoices only.** Select this checkbox to see only open invoices from the Invoices view.

(B) **Pay Total Balance.** Select this button to pay the entire amount owed for this account.

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

(D) **Download Invoice and Payment History.** This link will download history.

Invoices and Payments: Payment Preferences

(A) **Credit Card.** Select this to save or edit a credit card for making payments. For security reasons individual users can only view and edit their own payment preferences.

(B) **Auto-pay.** Allows LexisNexis to automatically debit your registered credit card for the full open invoice total on your account.

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

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Users

User information is accessible via the user tab on the left navigation bar.

Use this page to manage users within your organisation.

Accessing Invoice & Payments

(A) Add User. Select this to add a new user to your organisation.

(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. Use this link to download list of users.

(D) Filter. Search alphabetically by surname or select Admin to view all users with administrator access.

Individual User Functions

(E) Status. Select this drop-down list to change the status.

(F) Role. Select this drop-down to change user’s role. Choices include end user and admin.

(G) Reset Password. Select this to issue the user a new temporary password.

(H) Details. Select this tab to view and edit the general information for the user.

(I) Product Access. Select this tab to view and edit the user’s product access.

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Users: Add User

(A) Click the Add User button.

(B) Enter required information (identified by an asterisk).

(C) Optional: To generate and send a welcome e-mail, select either E-mail ID and Password to user or Send user ID and password to me. Note: ID and temporary password will be displayed on the following screen once you press submit.

(D) Insert check mark next to desired Product Access.
   Note: If you have multiple financial accounts, select the relevant account

(E) To create additional users, click the Create Additional Users button. Note: All users will be created with the same product access.

(F) Click Submit.

(G) Confirmation Screen. This screen instantly provides the created user’s ID and temporary password, which can be downloaded or emailed to the administrator who created it.

(H) 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 you want to find. Separate multiple names or IDs with a semicolon.

(B) **Status.** Select from this drop-down filter to narrow your search to users with a specific status (active, suspended or deleted).

(C) **Location.** Select from the location pull-down filter to narrow your search to users at a specific location.

(D) **Product Access.** Select from the product access pull-down filter to narrow your search to users with access to or without access to specific products.

(E) **All/A..Z.** Use the alphabet list to filter on the user’s last initial.

(F) **Admin.** Select this button to display a list of users who are administrators.

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Users: Manage Roles

(A) Admin capabilities can be edited from the **Role** drop down option.

(B) **Add as Admin** link will take you to the admin authorisations screen.

This area is where authorisations can be edited around users, the organisation and managing invoices and payments.

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Users: Reset Password

(A) Select the **Reset Password** 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 suppress the email to the user.

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

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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) Make changes.

(D) Click **Save**.

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(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.

(C) Make desired changes using the checkboxes and then click **Save**.
Organisation: Location Details

Organisation information is accessible via the organisation tab on the left navigation bar.

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

- **(A) Phone number.** Displays the phone number for your organisation. This may be edited by clicking on the pencil icon.
- **(B) Customer Number.**
- **(C) Public Records.** The public records access level for your organisation.
- **(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 organisation.
- **(F) Delete.** You can delete a secondary location from your organisation.
- **(G) Active Users.** Selecting this hyperlink takes you to the list of active users at this location.

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Organisation: Add Location

(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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Organisation: Delete Location

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

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

*Note: Primary location cannot be deleted.*

(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 **Submit** under delete location.

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

(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.
   - 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.

(C) Click Download to download the list of all publications the organisation is subscribed to so you can save or print it.

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Organisation: Client Matter

(A) Select the **Client/ID Matter Settings** tab.

(B) Select the **Edit** button.

<table>
<thead>
<tr>
<th>Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client ID mandatory</td>
<td>Select this to require users for this organization to set a Client ID when signing in to LexisNexis® Account Centre.</td>
</tr>
<tr>
<td>Client/Matter ID format</td>
<td>Enter the format the client/matter ID must conform to.</td>
</tr>
<tr>
<td></td>
<td>• N - means 0-9 is required</td>
</tr>
<tr>
<td></td>
<td>• X - means 0-9 and A-Z are acceptable</td>
</tr>
<tr>
<td></td>
<td>• A - means A-Z is required</td>
</tr>
<tr>
<td></td>
<td>• B - means a blank is required</td>
</tr>
<tr>
<td></td>
<td>The identifier you enter must match the displayed format character for each 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.</td>
</tr>
<tr>
<td>Use third-party validation</td>
<td>Select this if you are using a software-based client validation application such as LexisNexis® Cost Recovery Manager, Lookup Precision, Research Monitor, or OneLog.</td>
</tr>
<tr>
<td>Client Validation URL</td>
<td>If you are using a URL-based client validation application, enter the URL here.</td>
</tr>
<tr>
<td>Test URL to enable client validation (optional)</td>
<td>If you are using a URL-based client validation application, enter the URL here.</td>
</tr>
</tbody>
</table>

If you have any questions, please contact Technical Support at 1800 999 906 or techsupport@lexisnexis.com.au.

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