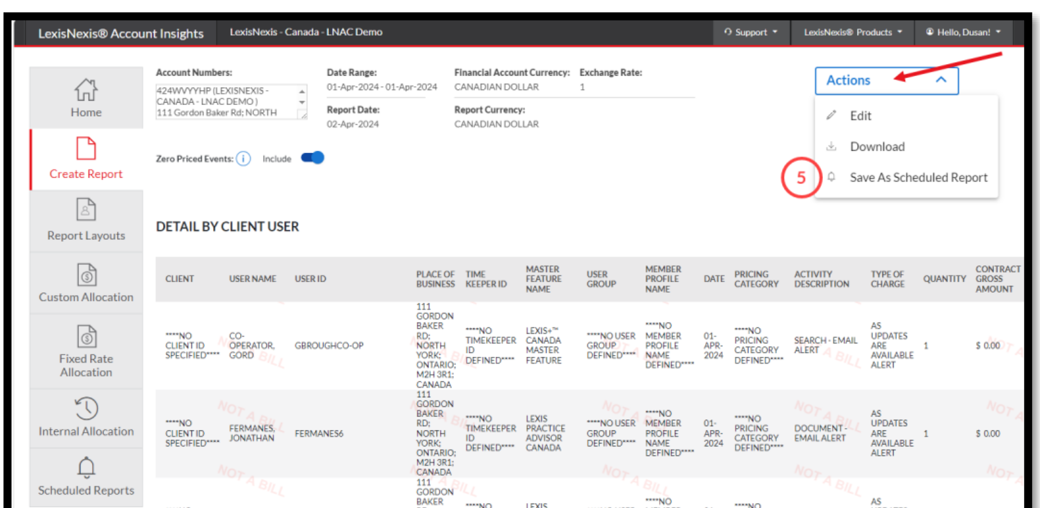
# How do I create an alert?

Creating alerts allows you to automate usage and chargeback reporting. In LexisNexis Account Insights, alerts are called **Scheduled Reports**, whereas in PowerInvoice, these features were called **Alerts**.

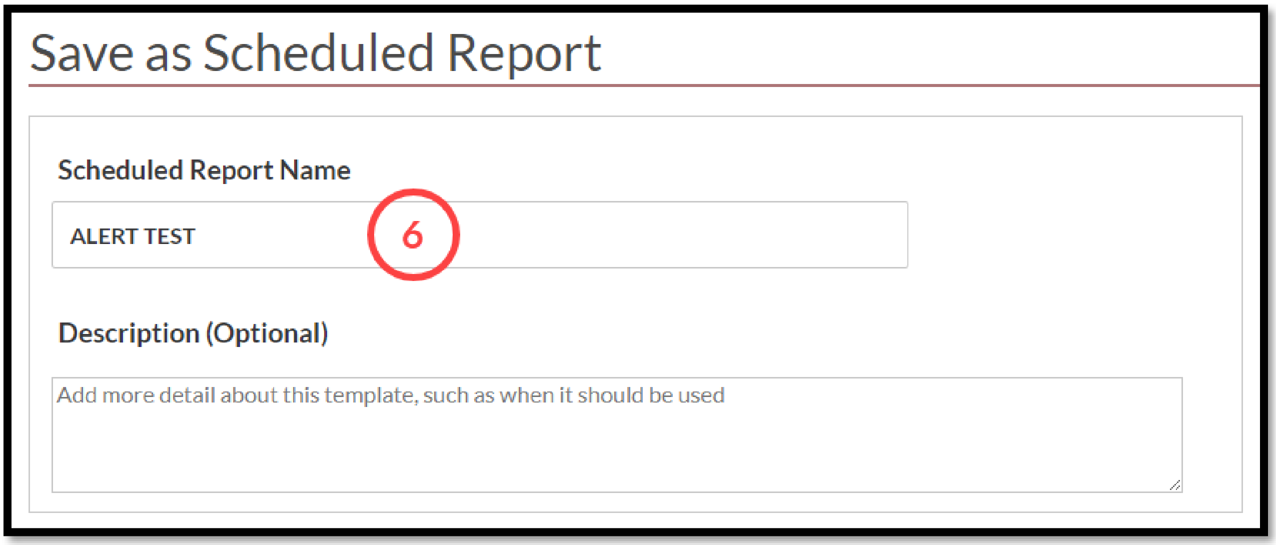
Follow the process below to set up an alert for your organization.

1. From anywhere within LexisNexis Account Insights, click the **Create Report** tab.
2. Make sure to select appropriate **Cost Recovery Methods**, **Report Layouts / Standard Report Selections**, and apply desired filters, if any.
    a. To see more details about choosing the right cost recovery method and report layout for your needs, please review the following step-by-step-instructions:
        i. How do I run a simple usage report?
        ii. How do I customize the look of my report?
        iii. How do I customize pricing for individual activities in my report?
        iv. How do I customize the total value for all platform subscriptions in my report?
3. **IMPORTANT**: The **Date Range** selection is irrelevant when creating an alert.
4. Once everything is selected, click the **View** button.

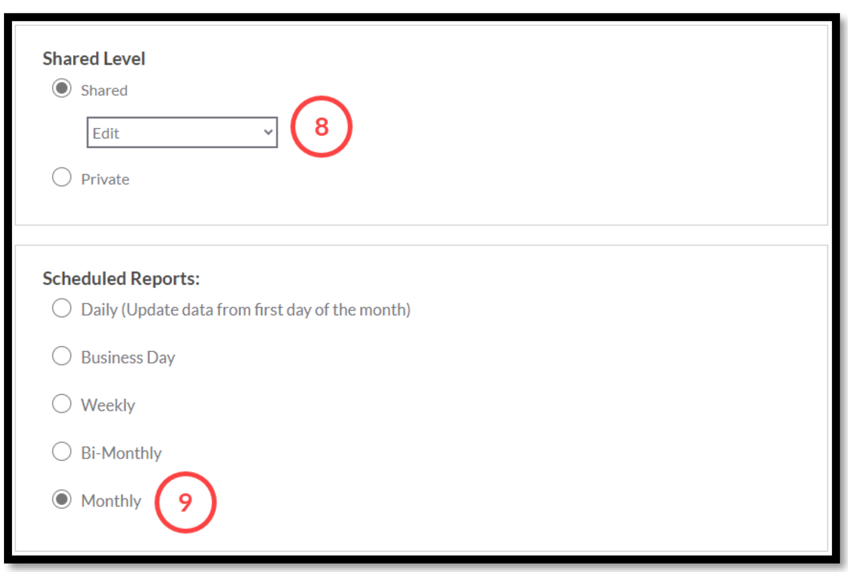

5. In the top right-hand corner, under the **Actions** button, select **Save As Scheduled Report** option.



6. Enter the name of your report in **Scheduled Report Name** box. If you want, enter a description of the report.




7. Leave the **Description** and **Cost Recovery** pods as they are.
8. Under **Shared Level** pod, select if you would like this alert to be visible to all administrators in your organization **(Shared)** or only to you **(Private)**.
    a. We recommend that you choose the **Shared > Edit** option, because if you are away for whatever reason and the alert needs to be amended, other users would be able to go in and make the necessary changes.
9. Under **Scheduled Reports** pod, select the cadence with which you would like to receive the report.



10. Under **Attached Report Format**, choose the report format that is right for you by clicking on the **View/Change Report Format** link.
    a. If you are looking for a classic Excel spreadsheet look, we recommend the ASCII report in a **.CSV** format.
    b. If you are looking to export the report as a **.TXT** file, you can now select that explicitly within the ASCII option.
11. Under **Send Report**, write in the following information:
    a. All email addresses that should be included in the reception of the alert;
    b. The **Subject** line that will appear in the alert email; and,
    c. A message, if any, that will appear in the body of the alert email.
12. Once you are satisfied with your selections, click the **Save** button.