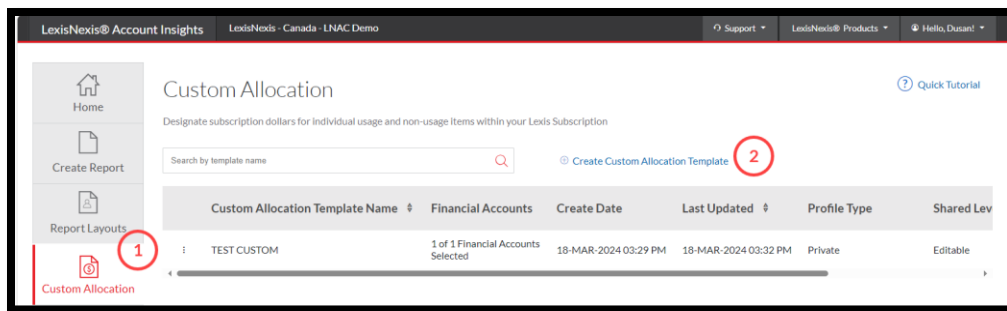


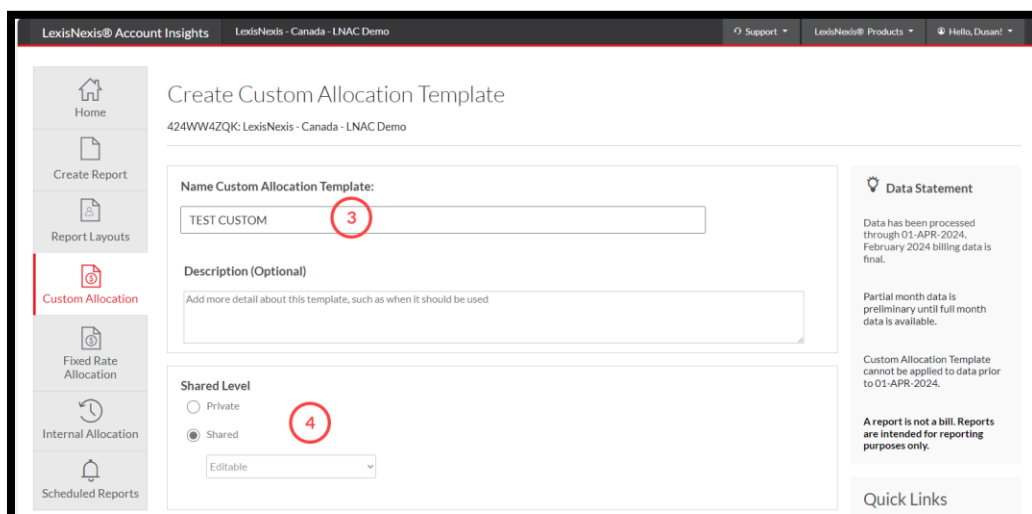
How do I customize the total value for all platform subscriptions in my report?

There is a new feature in LexisNexis Account Insights that allows users to customize their own reference value for all platform subscriptions for chargeback purposes. This value is important because it serves as the reference for pro rating chargebacks within the **CONTRACT NET AMOUNT** column, ensuring that you are maximizing your total cost recovery dollars.

1. From anywhere within LexisNexis Account Insights, click the **Custom Allocation** tab.
2. Click the **Create Custom Allocation Template** link.



3. Give a name to your **Fixed Rate Template** under the **Name Custom Allocation Template** box. If you want, enter the description of the Custom Allocation Template in the next box.
4. Under **Shared Level**, select if you would like this template to be visible to all administrators in your organization (**Shared**) or only to you (**Private**).
 - a. We recommend that you choose the **Shared > Editable** option, because if you are away for whatever reason and the report layout needs to be amended, other users would be able to go in and make the necessary changes.



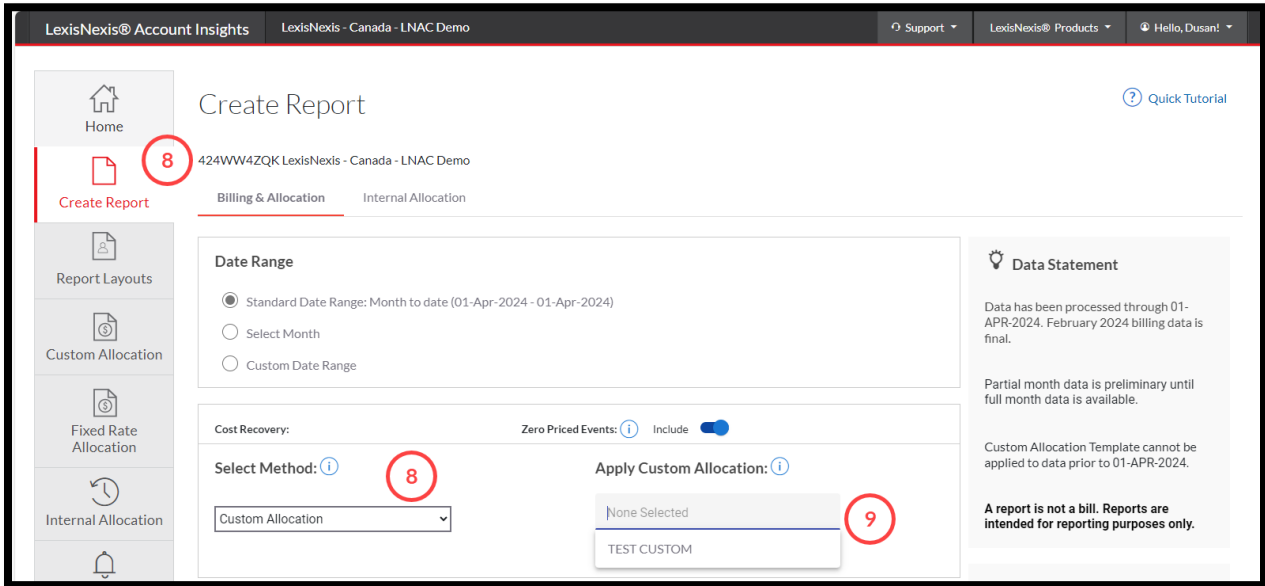
- Next, under the **Monthly Subscription Cost** option, enter the values you wish to allocate for each Usage and Non Usage product. The values can be expressed either in dollars (e.g. \$1,000.00) or as percentages of the individual product’s subscription value (e.g. 25%).

Monthly Subscription Cost:		Apply Default Allocation:		
		*All checked items require a value		
		<u>Include</u>	<u>%</u>	OR <u>Amount</u>
Context		<input checked="" type="checkbox"/>	<input type="text"/> %	\$ <input type="text"/> 0.00
Diligence		<input checked="" type="checkbox"/>	<input type="text"/> %	\$ <input type="text"/> 0.00
Intelligize		<input checked="" type="checkbox"/>	<input type="text"/> %	\$ <input type="text"/> 0.00
Lexis		<input checked="" type="checkbox"/>	<input type="text"/> %	\$ <input type="text"/> 2,000.00
Practical Guidance		<input checked="" type="checkbox"/>	<input type="text"/> %	\$ <input type="text"/> 2,000.00
QuickLaw		<input checked="" type="checkbox"/>	<input type="text"/> %	\$ <input type="text"/> 1,000.00
Monthly Cost:	\$0.00	Allocation:	∞%	\$5,000.00
Total Monthly Cost:	\$0.00	Allocated:	∞%	\$5,000.00

- Under **Custom Allocation Template Filters**, make sure to exclude any categories from your custom allocation.

Custom Allocation Template Filters	View All Filters
Select a Category	
Activity Description	ALL
Client IDs	ALL
Place of Business	ALL
Pricing Categories	ALL
Types of Charges	ALL
User Names	ALL
Reset All Filters	

- Once you are happy with your selections, click the **Save** button.
- To assign your custom allocation as a part of a report, go to **Create Report** and under **Cost Recovery** option, click on the **Select Method** dropdown and select **Custom Allocation**.
- Under **Apply Custom Allocation**, click the **None selected** grey box and select your custom allocation.



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Create Report

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Home

Create Report

Report Layouts

Custom Allocation

Fixed Rate Allocation

Internal Allocation

Billing & Allocation Internal Allocation

Date Range

Standard Date Range: Month to date (01-Apr-2024 - 01-Apr-2024)

Select Month

Custom Date Range

Cost Recovery: Zero Priced Events: Include

Select Method:

Apply Custom Allocation:

TEST CUSTOM

Data Statement

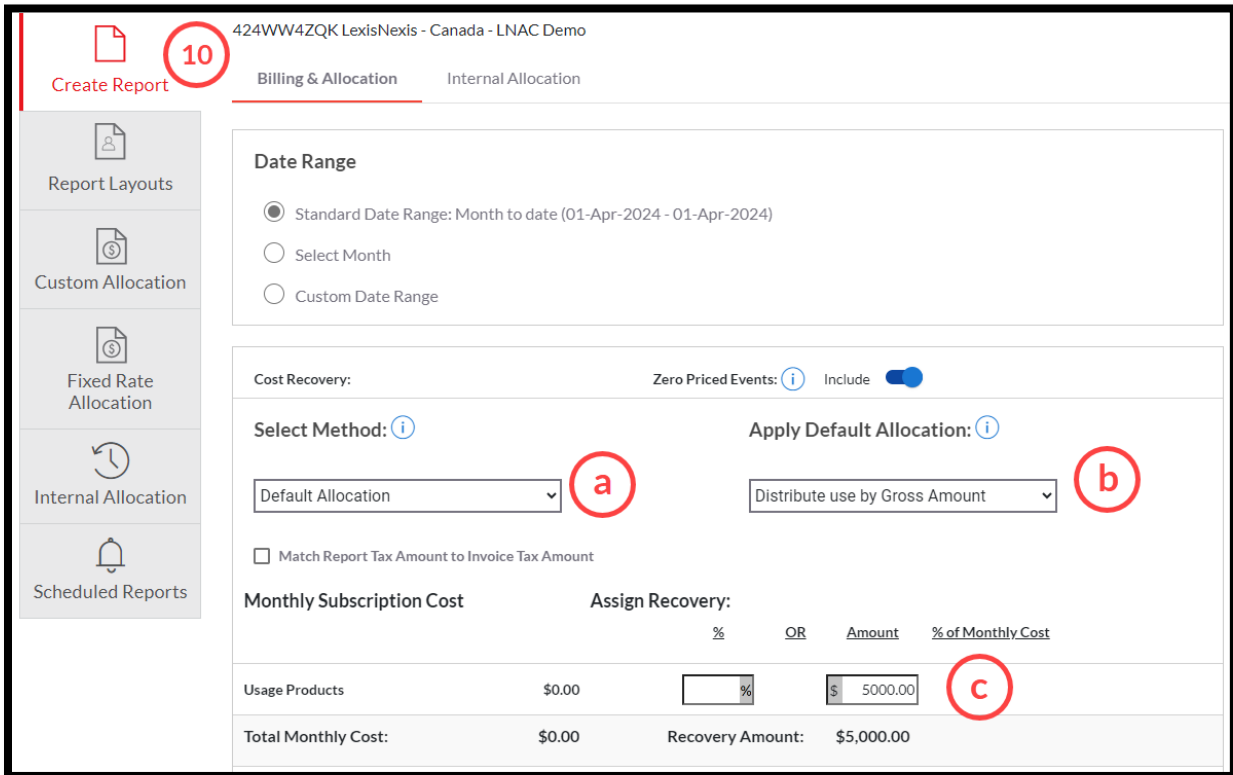
Data has been processed through 01-APR-2024. February 2024 billing data is final.

Partial month data is preliminary until full month data is available.

Custom Allocation Template cannot be applied to data prior to 01-APR-2024.

A report is not a bill. Reports are intended for reporting purposes only.

10. As an alternative to this process, you also do a manual custom allocation without creating a template when you are in the **Create Report** tab.
 - a. Under **Cost Recovery**, click on the **Select Method** dropdown and select **Default Allocation**.
 - b. Choose **Distribute use by Gross Amount**.
 - c. Under the **Monthly Subscription Cost** option, assign either the dollar amount or the percentage amount to Usage and Non Usage products.



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Create Report **10** Billing & Allocation Internal Allocation

Report Layouts

Custom Allocation

Fixed Rate Allocation

Internal Allocation

Scheduled Reports

Date Range

Standard Date Range: Month to date (01-Apr-2024 - 01-Apr-2024)

Select Month

Custom Date Range

Cost Recovery: Zero Priced Events: Include

Select Method: Apply Default Allocation:

a **b**

Match Report Tax Amount to Invoice Tax Amount

Monthly Subscription Cost Assign Recovery:

		%	OR	Amount	% of Monthly Cost
Usage Products	\$0.00	<input type="text"/>		\$ 5000.00 c	
Total Monthly Cost:	\$0.00			Recovery Amount: \$5,000.00	

11. Once you are happy with all your selections, click **View** or **Download** to obtain the report.
12. Irrespective of the option you choose (whether through a **Custom Allocation** template or a manual allocation within the **Default Allocation** option), all pro rated chargebacks with the new Recovery Amount will be displayed in the **CONTRACT NET AMOUNT** column of the report.