

How do I customize pricing for individual activities in my report?

Customizing pricing allows you to create your own price list for the purposes of client chargeback, rather than relying on LexisNexis pricing models. In LexisNexis Account Insights, custom pricing is called **Fixed Rate Allocation**, whereas in PowerInvoice, it was called **Custom Pricing**.

- 1. From anywhere within LexisNexis Account Insights, click the Fixed Rate Allocation tab.
- 2. Click the Fixed Rate Template link.

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Fixed Rate Allocation)								

- 3. Give a name to your **Fixed Rate Template** under the **Name Fixed Rate Template** box. If you want, enter the description of the Fixed Rate 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.
- 5. Click Next.

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6. Because all fields <u>must have</u> some value, we recommend that you first enter the value of <u>100.00%</u> in the **Apply to all listed charges** box and click the **Apply** button.

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7. Now, you can go in and customize not just each class, but specific activity types and activity categories. Below, you can find a pathway how to amend the pricing for some of the most common activities in our platforms. We will imagine that we want to change the activity to be charged back at \$5.



a. Running a search: CLASS = SEARCH → TYPES OF CHARGES = ACCESS CHARGE → ACTIVITY CATEGORY = LEXIS, switch to dollar sign and enter the value 5.00

Activity Class	Activity Type Xpply to SEARCH individually	Activity Category Apply to ACCESS CHARGE individually
Q Search Classes	Search Types of Charge	Q Search Categories (All
100.00 x S Apply	100.00 % S Apply	100.00 % Apply
LEXIS+ GENERAT 100.00 % % × LITIGATION ANAL 100.00 % % × LITIGATION PROF 100.00 % % × MEDICAL NAVIGA 100.00 % % ×	→ Types of Charges Rates ACCESS CHARGE Mixed Rates FEATURE FUNCTI 100.00 % X LEVEL 1 SEARCH 100.00 % X	→ IN LASES IUU.UU * * * * * IN LEGISLATION, STATI 100.00 * \$ × LEXIS \$ 5.00 * \$ × MY CASES 100.00 * \$ ×
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SEARCH Mixed Rates	PUB REC SEARCH 100.00 % % X TP1-SEARCHES 100.00 % % X	NO ACTIVITY DESCRIP

b. Accessing a secondary source (e.g. legal encyclopedia): CLASS = DOC ACCESS → TYPES OF CHARGES = DOC ACCESS → ACTIVITY CATEGORY = CA ENCYCLOPEDIAS, switch to dollar sign and enter the value 5.00

Activity Class		Activity Type Apply to DOC ACCESS individually		Activity Category Apply to DOC ACCESS individually		
Apply to all listed charges 100.00 % Apply		Q Search Types of Charge Apply to all listed charges 100.00 % 5		Apply to all listed charges 100.00 %		
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c. Accessing caselaw:

CLASS = DOC ACCESS \rightarrow TYPES OF CHARGES = DOC ACCESS \rightarrow ACTIVITY CATEGORY = CA CASES (Activity Description), switch to dollar sign and enter the value **5.00**

Activity Class	Activity Type Apply to DOC ACCESS individually	Activity Category Apply to DOC ACCESS individually
Q Search Classes Apply to all listed charges 100.00 % S Apply	Apply to all listed charges 100.00 *	Q Search Categories All Apply to all listed charges 100.00 % Apply
Classes Rates ALERTS 100.00 % § × BRIEF ANALYSIS 100.00 % § × COMPETITIVE IN 100.00 % § × CONTEXT 100.00 % § × COURTLINK 100.00 % § × D & B 100.00 % § × DOC ACCESS Mixed Rates	→ Types of Charges DOC ACCESS Mixed Rates	CA ANALYTICAL MATE 100.00 % % × CA CASE CITATORS 100.00 % % × CA CASE SUMMARIES 100.00 % % × CA CASES (High Level C 100.00 % % × CA CASES (Activity Des \$ 5.00 % × CA CONSTITUTIONS 100.00 % % × CA DICTIONARIES (Act 100.00 % % × •

d. Accessing legislation: CLASS = DOC ACCESS → TYPES OF CHARGES = DOC ACCESS → ACTIVITY CATEGORY = CA LEGISLATION, STATUTORY CODES AND COURT RULES, switch to dollar sign and enter the value 5.00

Activity Class	Activity Type Apply to DOC ACCESS individually	Activity Category X Apply to DOC ACCESS individually			
Q Search Classes Apply to all listed charges 100.00 % 3 Apply	Search Types of Charge Apply to all listed charges 100.00 % 3 Apply	Q Search Categories All Apply to all listed charges 100.00 \$ Apply			
Classes Kates ALERTS 100.00 % % × BRIEF ANALYSIS 100.00 % % × COMPETITIVE IN 100.00 % % × CONTEXT 100.00 % % × D&B 100.00 % % × DOC ACCESS Mixed Rates	→ Types of Charges Rates DOC ACCESS Mixed Rates	CA LEGISLATION CITA' CA LEGISLATION CITA' CA LEGISLATION STAT CA LEGISLATION, STAT CA LEGISLATION, STAT CA NOTIONS 100.00 % S × CA PLEADINGS 100.00 % S × CA PLEADINGS			



e. Accessing caselaw or legislation citator CLASS = DOC ACCESS → TYPES OF CHARGES = DOC ACCESS → CA LEGISLATION CITATORS or CA CASE CITATORS, switch to dollar sign and enter the value 5.00

Activity Class		Activity Type		Activity Category X Apply to DOC ACCESS individually
Q Search Classes Apply to all listed charges 100.00 🛛 🎝		Search Types of Charge Apply to all listed charges 100.00 % \$ Apply		Q Search Categories (All Apply to all listed charges 100.00 % Apply
Classes Kates ALERTS 100.00 % % × BRIEF ANALYSIS 100.00 % % × COMPETITIVE IN 100.00 % % × CONTEXT 100.00 % % × D & B 100.00 % % × DOC ACCESS Mixed Rates	\rightarrow	Types of Charges 💉 Rates DOC ACCESS Image: Constraint of the second	\rightarrow	CA LAW REVIEWS ANE 100.00 % \$ X CA LEGAL ARTICLES 100.00 % \$ X CA LEGISLATION CITA: \$ 5.00 \$ X CA LEGISLATION, STAT \$ 5.00 \$ X CA MOTIONS 100.00 \$ X CA PLEADINGS 100.00 \$ X

8. Once you are happy with your amendments of individual item prices, click **Next**.

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Internal Allocation	COMPETITIVE IN 100.00 (N) X CONTEXT 100.00 (N) X D6.8 100.00 (N) X D058ER 100.00 (N) X HOURLY TIME \$ 0.00 O X X LD05 / GENERAT 100.00 (N) X	Types of Charges → DOC ACCESS Mixed Rates →	CA CASE SUMMARIES 100.00 % X CA CASES (High Level C) 100.00 % X CA CASES (Heigh Level C) 100.00 % X CA CASES (Activity Des) \$ 5.00 % X CA CONSTITUTIONS 100.00 % X CA CADICTIONARIES (Activity Des) \$ 100.00 % X CA DICTIONARIES (Activity Des) 100.00 % X CA DICTIONARIES (Hg) 100.00 % X	(8)
				Cancel Reset All Next



- 9. If you are looking to completely exclude specific items, you can select them from the list under the **Assign Template Filters** step.
 - a. If yes, select the items you wish to exclude.
 - b. If not, just click **Next**.

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6	Pricing Categories	ALL	CA ADMINISTRATIVE DECISIONS	1		
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5	Types of Charges	ALL	CA CASES			
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10. Finally, if you are happy with all your settings, click the **Save** button.

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Fixed Rate Allocation					Cancel	Save					



11. You can apply this newly created Gross Amount custom pricing to individual usage items when you click **Create Report** tab > **Select Method = Fixed Rate Allocation > Apply Fixed Rates =** click on the grey box and select the name of your Fixed Rate Allocation template

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S Internal Allocation	Cost Recovery: Zero Priced Events: 1 Include 🗨 11	A report is for report	s not a bill. Reports are inter ing purposes only.	nded
C Scheduled Reports	Select Method: Apply Fixed Rates: None Selected None Selected	Quick	Links	
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12. When you run the report, the new pricing will be displayed under the column **CONTRACT NET AMOUNT**.

IMPORTANT NOTE FOR PRICING CUSTOMIZATION:

Only activities that have a **Contract Gross Amount** value that is higher than \$0 can be customized. All values that have a **Contract Gross Amount** value of \$0 cannot be customized. This is one of the reasons why users should carefully decide whether to have a **Doc-Access Pricing Model**, **a.k.a. Default Pricing Model** or **Search and Document Access Pricing Model**, **a.k.a. Hybrid Pricing Model**.

If your organization is looking to customize pricing, we recommend selecting the **Search and Document Access Pricing Model**. The reason is that, via this model, access to all primary sources (like caselaw, legislation, and case & legislation citators) will carry a **Gross Contract Amount** of \$0 and you will be able to modify the chargeback value of running a search as well as accessing secondary sources, like textbooks, legal encyclopedias, commentaries, law reviews and journals.