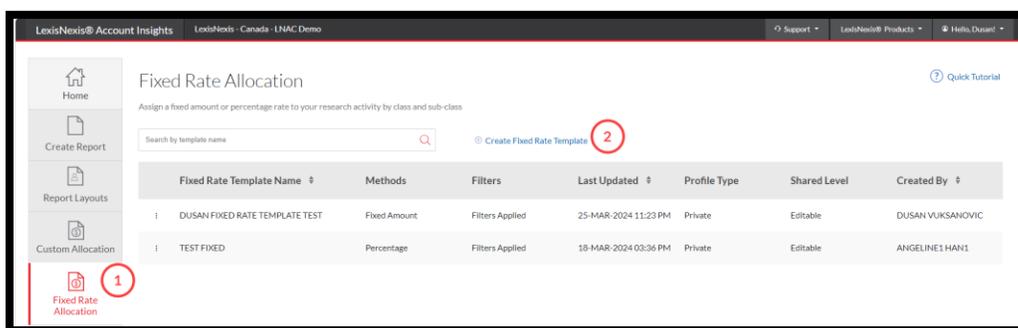


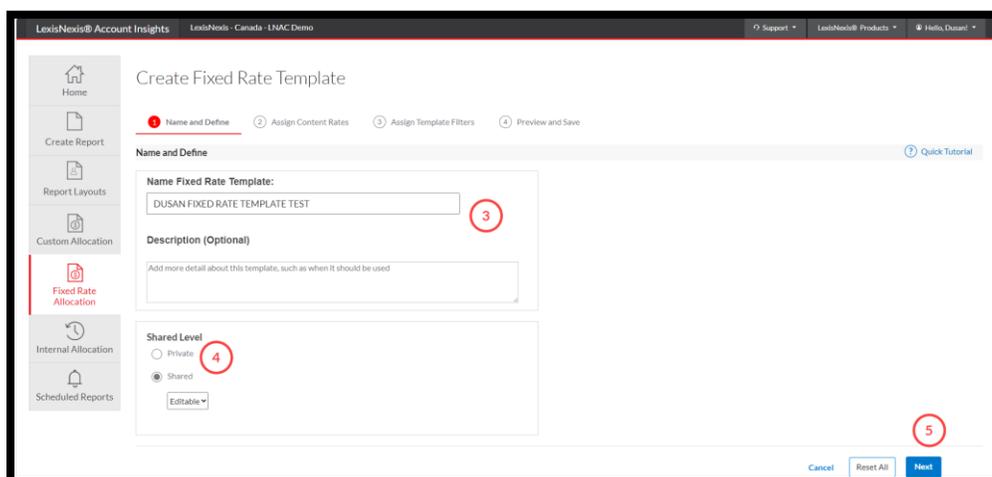
How do I customize pricing for individual activities in my report?

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**.

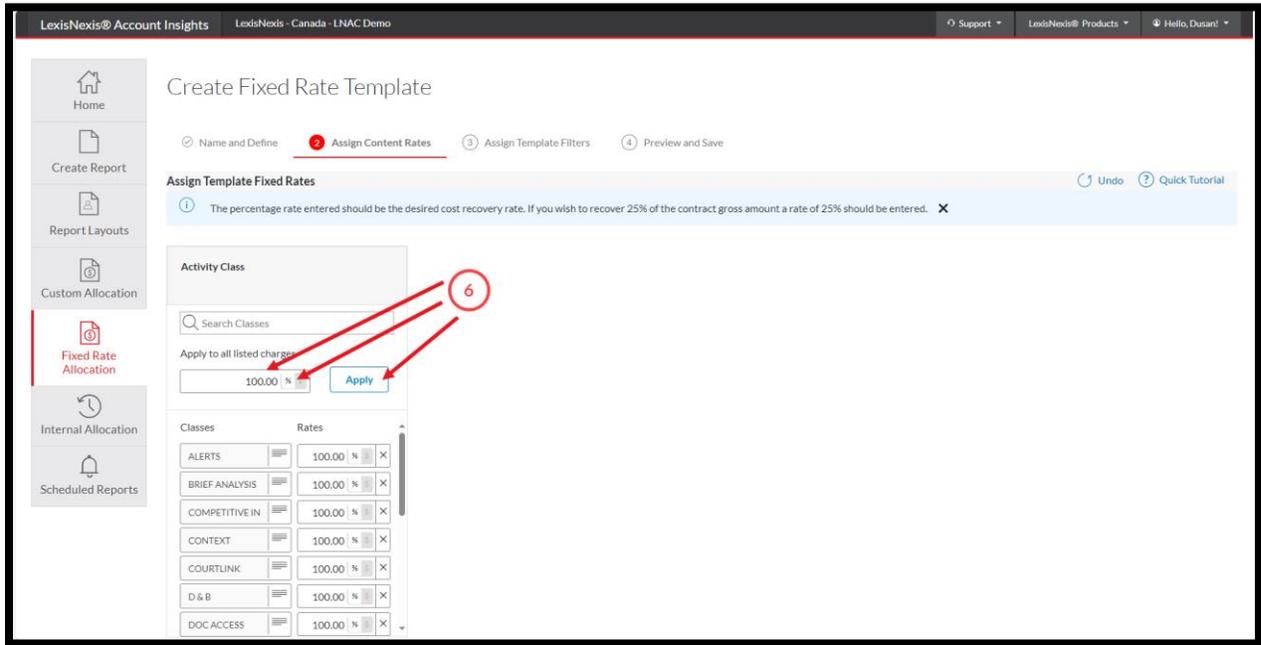
1. From anywhere within LexisNexis Account Insights, click the **Fixed Rate Allocation** tab.
2. Click the **Fixed Rate Template** link.



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**.



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



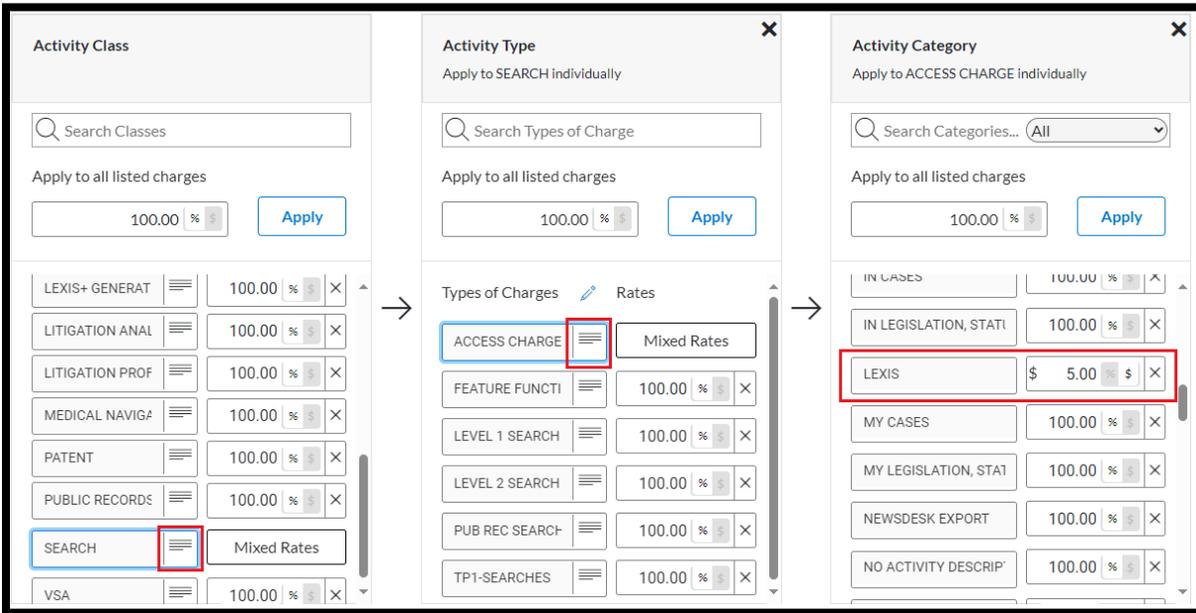
The screenshot shows the 'Create Fixed Rate Template' interface. The 'Assign Content Rates' step is active. A red circle with the number '6' is placed over the 'Apply' button in the 'Apply to all listed charges' section. A red arrow points from the '6' to the 'Apply' button. Another red arrow points from the '6' to the '100.00 %' input field. A third red arrow points from the '6' to the 'Apply' button. A table of classes and rates is visible below.

Classes	Rates
ALERTS	100.00 % X
BRIEF ANALYSIS	100.00 % X
COMPETITIVE IN	100.00 % X
CONTEXT	100.00 % X
COURTLINK	100.00 % X
D & B	100.00 % X
DOC ACCESS	100.00 % X

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

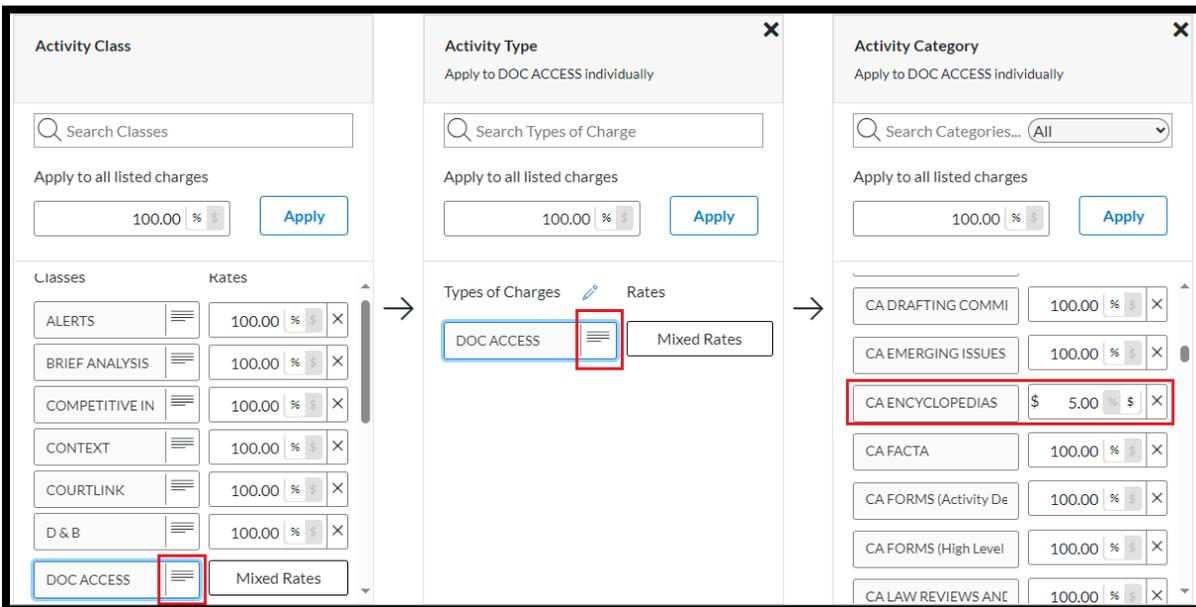


The screenshot displays three configuration panels for an activity:

- Activity Class:** A list of classes including LEXIS+ GENERAT, LITIGATION ANAL, LITIGATION PROF, MEDICAL NAVIG#, PATENT, PUBLIC RECORDS, SEARCH (highlighted), and VSA. Each class has a rate of 100.00 %.
- Activity Type:** A list of types of charges including ACCESS CHARGE (highlighted), FEATURE FUNCTI, LEVEL 1 SEARCH, LEVEL 2 SEARCH, PUB REC SEARCH, and TP1-SEARCHES. Each type has a rate of 100.00 %.
- Activity Category:** A list of categories including IN CASES, IN LEGISLATION, STATI, LEXIS (highlighted with a rate of \$ 5.00), MY CASES, MY LEGISLATION, STATI, NEWSDESK EXPORT, and NO ACTIVITY DESCRIP. Each category has a rate of 100.00 %.

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

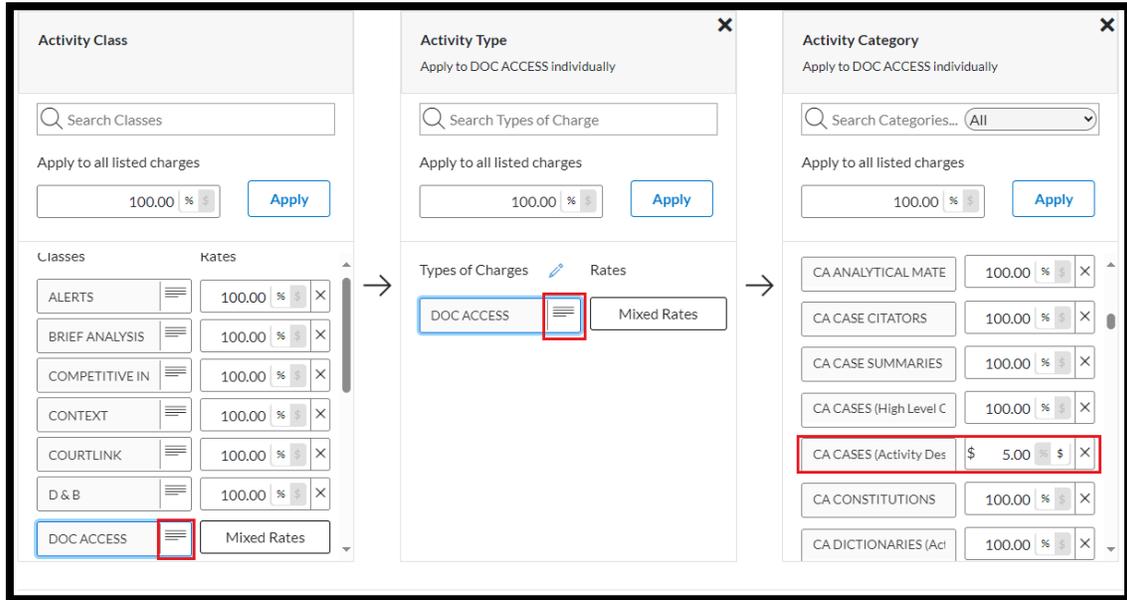


The screenshot displays three configuration panels for an activity:

- Activity Class:** A list of classes including ALERTS, BRIEF ANALYSIS, COMPETITIVE IN, CONTEXT, COURTLINK, D & B, and DOC ACCESS (highlighted). Each class has a rate of 100.00 %.
- Activity Type:** A list of types of charges including DOC ACCESS (highlighted) and Mixed Rates. DOC ACCESS has a rate of 100.00 %.
- Activity Category:** A list of categories including CA DRAFTING COMMI, CA EMERGING ISSUES, CA ENCYCLOPEDIAS (highlighted with a rate of \$ 5.00), CA FACTA, CA FORMS (Activity De), CA FORMS (High Level), and CA LAW REVIEWS ANE. Each category has a rate of 100.00 %.

c. **Accessing caselaw:**

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

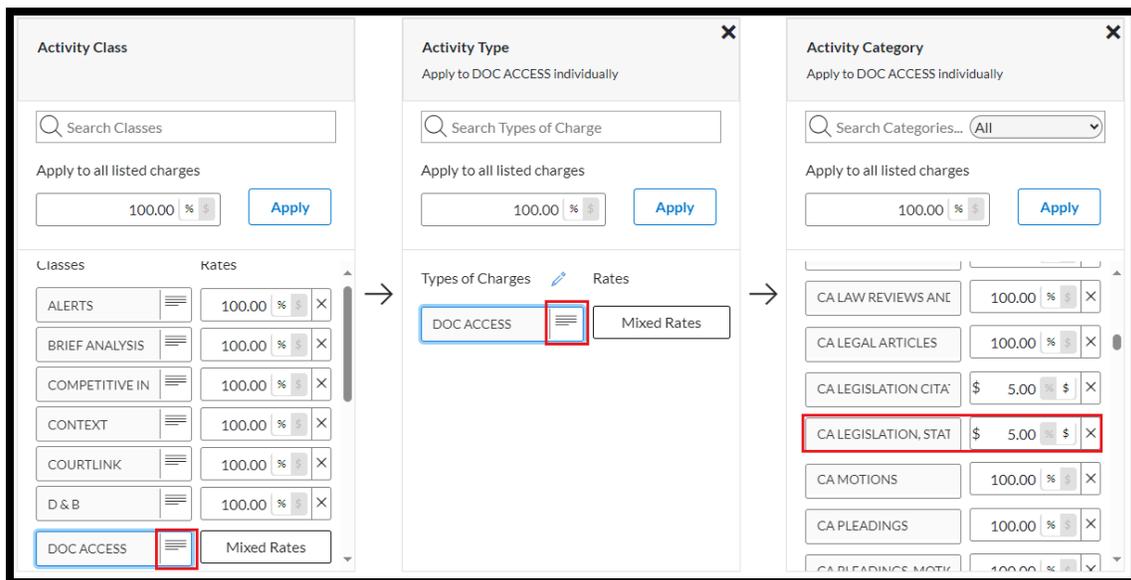


The screenshot shows three configuration panels for setting up caselaw access:

- Activity Class:** A search bar for classes and a table of classes. The 'DOC ACCESS' class is selected, with a rate of 100.00 %.
- Activity Type:** A search bar for types of charge and a table of types. 'DOC ACCESS' is selected, with a rate of 100.00 %.
- Activity Category:** A search bar for categories and a list of categories. 'CA CASES (Activity Des)' is selected, with a rate of \$ 5.00.

d. **Accessing legislation:**

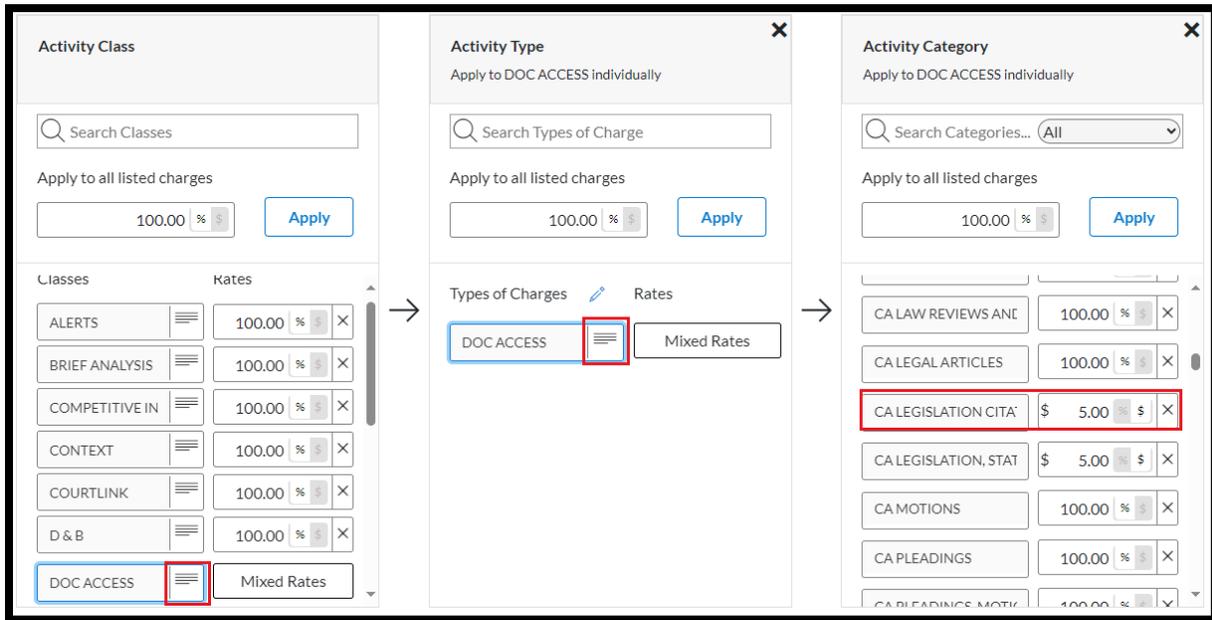
CLASS = DOC ACCESS → TYPES OF CHARGES = DOC ACCESS → ACTIVITY CATEGORY = CA LEGISLATION, STATUTORY CODES AND COURT RULES, switch to dollar sign and enter the value 5.00



The screenshot shows three configuration panels for setting up legislation access:

- Activity Class:** A search bar for classes and a table of classes. The 'DOC ACCESS' class is selected, with a rate of 100.00 %.
- Activity Type:** A search bar for types of charge and a table of types. 'DOC ACCESS' is selected, with a rate of 100.00 %.
- Activity Category:** A search bar for categories and a list of categories. 'CA LEGISLATION, STAT' is selected, with a rate of \$ 5.00.

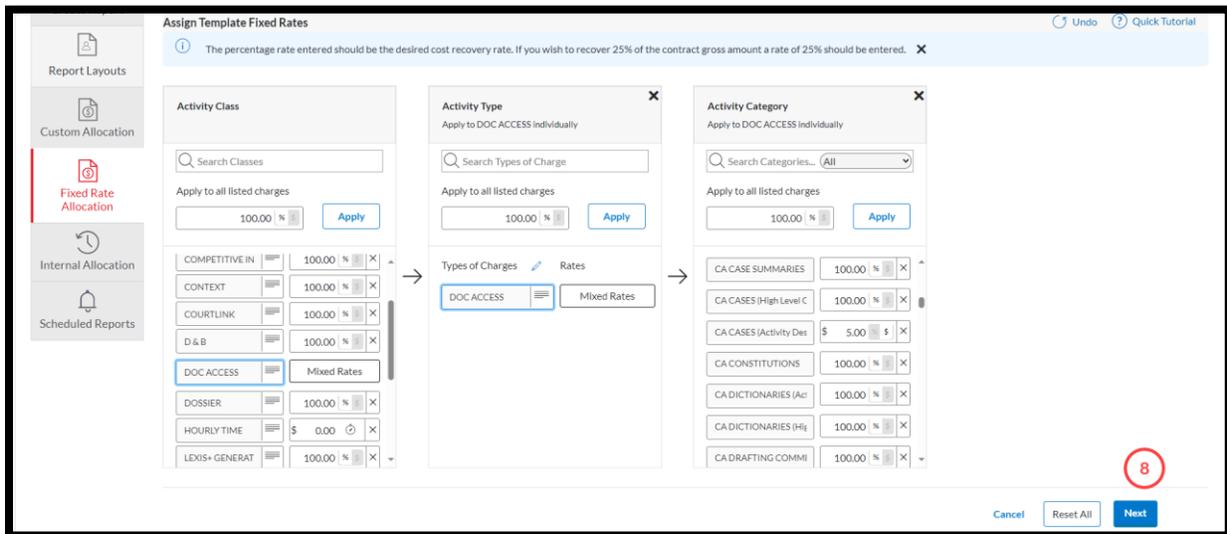
- e. **Accessing caselaw or legislation citator**
 CLASS = DOC ACCESS → TYPES OF CHARGES = DOC ACCESS → CA LEGISLATION CITATORS or CA CASE CITATORS, switch to dollar sign and enter the value 5.00



The screenshot shows three panels in the 'Assign Template Fixed Rates' dialog:

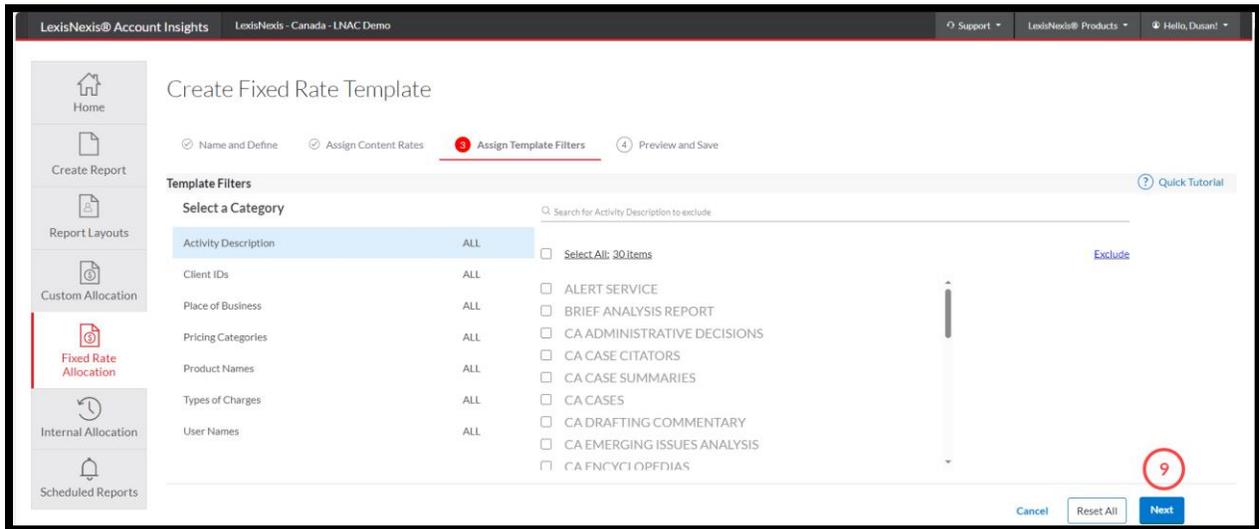
- Activity Class:** A list of classes including ALERTS, BRIEF ANALYSIS, COMPETITIVE IN, CONTEXT, COURTLINK, D & B, and DOC ACCESS. The DOC ACCESS class is selected, and its rate is set to 100.00 %.
- Activity Type:** A list of types of charges including DOC ACCESS and Mixed Rates. The DOC ACCESS type is selected, and its rate is set to 100.00 %.
- Activity Category:** A list of categories including CA LAW REVIEWS ANE, CA LEGAL ARTICLES, CA LEGISLATION CITATORS, CA LEGISLATION, STAT, CA MOTIONS, CA PLEADINGS, and CA PLEADINGS MOTI. The CA LEGISLATION CITATORS category is selected, and its rate is set to \$ 5.00.

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

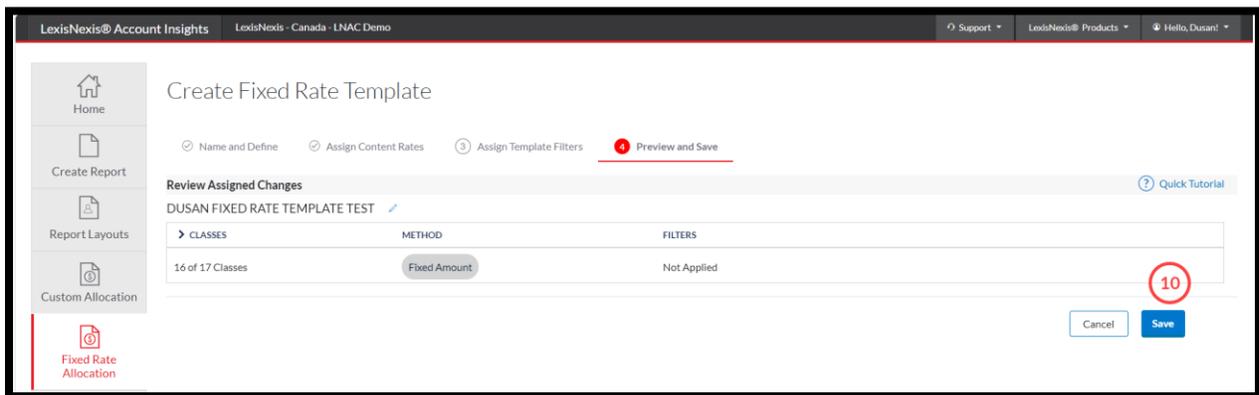


The screenshot shows the 'Assign Template Fixed Rates' dialog box with the 'Next' button circled in red. The dialog box is titled 'Assign Template Fixed Rates' and includes a warning message: 'The percentage rate entered should be the desired cost recovery rate. If you wish to recover 25% of the contract gross amount a rate of 25% should be entered.' The dialog box is divided into three panels: Activity Class, Activity Type, and Activity Category. The Activity Class panel shows a list of classes including COMPETITIVE IN, CONTEXT, COURTLINK, D & B, DOC ACCESS, DOSSIER, HOURLY TIME, and LEXIS-GENERAT. The Activity Type panel shows a list of types of charges including DOC ACCESS and Mixed Rates. The Activity Category panel shows a list of categories including CA CASE SUMMARIES, CA CASES (High Level C), CA CASES (Activity Des), CA CONSTITUTIONS, CA DICTIONARIES (Act), CA DICTIONARIES (Hig), and CA DRAFTING COMMI. The 'Next' button is circled in red.

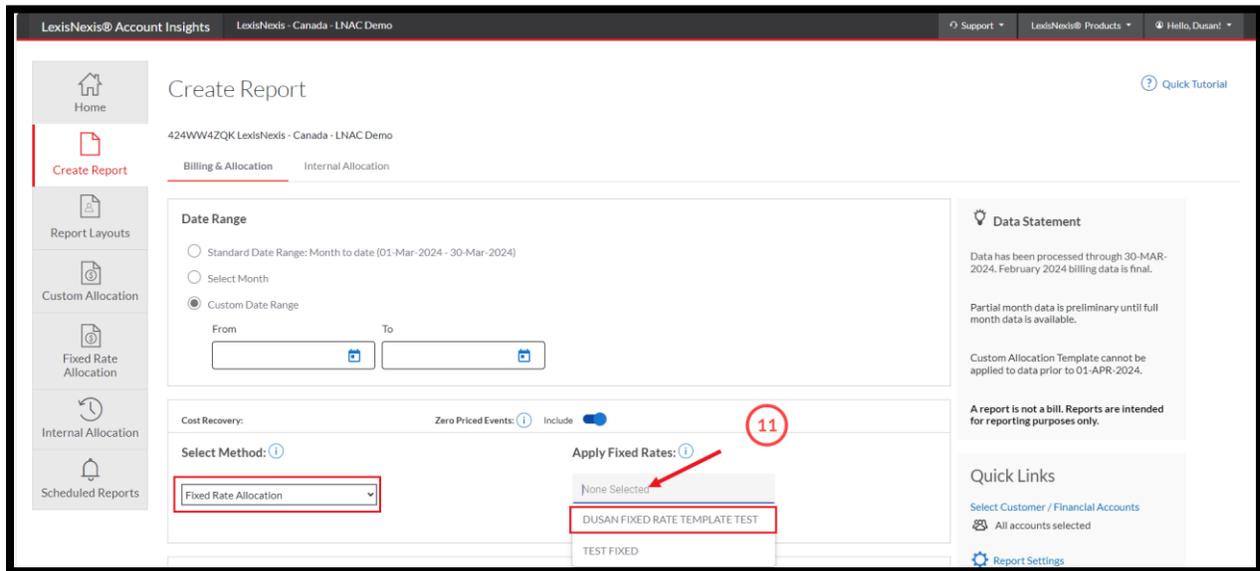
9. If you are looking to completely exclude specific items, you can select them from the list under the **Assign Template Filters** step.
 - a. If yes, select the items you wish to exclude.
 - b. If not, just click **Next**.



10. Finally, if you are happy with all your settings, click the **Save** button.



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



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.