

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.

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Home			tom Allocation te subscription dollars for individual usage and non	-usage items within your Lexis	sSubscription			Quick Tutorial
Create Report	t	Search	by template name	Q	Create Custom Allocati	on Template 2		
Report Layout	~		Custom Allocation Template Name 🔅	Financial Accounts	Create Date	Last Updated 🔅	Profile Type	Shared Lev
Custom Allocati	1	-	TEST CUSTOM	1 of 1 Financial Accounts Selected	18-MAR-2024 03:29 PM	18-MAR-2024 03:32 PM	Private	Editable

- 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.

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Home	Create Custom Allocation Template 424WW4ZQK:LexisNexis - Canada - LNAC Demo			
Create Report	Name Custom Allocation Template: TEST CUSTOM		Data has beer through 01-Ai February 202 final.	processed
Custom Allocation	Description (Optional) Add more detail about this template; such as when it should be used		Partial month preliminary u data is availab	ntil full month
Fixed Rate Allocation	Shared Level		Custom Alloc cannot be app to 01-APR-20	ation Template lied to data prior 24.
Internal Allocation	Private Shared		A report is no are intended purposes only	
Scheduled Reports	Consume -		Quick Li	nks



5. 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 Co	Apply Default A	Allocation:				
		*All checked ite	ms require a	value		
		Include	<u>%</u>	OR	Amount	
Context			%	\$	0.00	
Diligence			%	\$	0.00	
Intelligize		<	%	\$	0.00	
Lexis		<	%	\$	2,000.00	
Practical Guidance		 ✓ 	%	\$	2,000.00	
QuickLaw			%	\$	1,000.00	
Monthly Cost:	\$0.00	Allocation:	∞%	\$	\$5,000.00	
Total Monthly Cost:	\$0.00	Allocated:	∞%	\$	\$5,000.00	

6. 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



- 7. Once you are happy with your selections, click the **Save** button.
- 8. 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**.
- 9. Under **Apply Custom Allocation**, click the **None selected** grey box and select your custom allocation.

LexisNexis® Account	nsights LexisNexis - Canada - LNAC Demo	O Support 👻	LexisNexis® Products 🔹 🏵 Hello, Dusan! 👻
Home	Create Report 424WW4ZQK LexisNexis - Canada - LNAC Demo		② Quick Tutorial
Create Report	Billing & Allocation Internal Allocation Date Range		♥ Data Statement
© Custom Allocation	Standard Date Range: Month to date (01-Apr-2024 - 01-Apr-2024) Select Month Custom Date Range		Data has been processed through 01- APR-2024. February 2024 billing data is final. Partial month data is preliminary until
Fixed Rate Allocation	Cost Recovery: Zero Priced Events: i Include Select Method: i Apply Custom	Allocation: 1	Fairuan month data is preinning yourun full month data is available. Custom Allocation Template cannot be applied to data prior to 01-APR-2024.
Internal Allocation	Custom Allocation	()	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	Billing & Allocation Internal Allocation			
Report Layouts	Date Range			
(S) Custom Allocation	 Standard Date Range: Month to date (01-Apr-2024 - 01-Apr-2024) Select Month Custom Date Range 			
⑤ Fixed Rate Allocation	Cost Recovery: Zero Priced Events: (i) Include			
J Internal Allocation	Select Method: (i) Apply Default Allocation: (i) Default Allocation Image: Construction image:			
Ç Scheduled Reports	Match Report Tax Amount to Invoice Tax Amount Monthly Subscription Cost Assign Recovery:			
	% OR Amount % of Monthly Cost			
	Usage Products \$0.00 % \$ 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.