

## 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	Custo	om Allocation	usage items within your Lexis	Subscription			Quick Tutorial
Create Report	Search by	template name	Q	Create Custom Allocati	on Template 2		
A Report Lavoute		Custom Allocation Template Name 🗍	Financial Accounts	Create Date	Last Updated 🖇	Profile Type	Shared Lev
Custom Allocation		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.	atement processed PR-2024. 4 billing data is
Custom Allocation	Description (Optional) Add more detail about this template; such as when it should be used		Partial month preliminary u data is availab	data is tíl full month le.
Fixed Rate Allocation	Shared Level		Custom Alloc cannot be app to 01-APR-20	ation Template lied to data prior 24.
Internal Allocation	Finance     A		A report is no are intended purposes only	t a bill. Reports for reporting
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 Cost:		Apply Default A	Allocation:		
		*All checked iter	ms require a	value	
		Include	<u>%</u>	OR <u>Amount</u>	$\frown$
Context		<ul> <li>✓</li> </ul>	%	\$ 0.00	5
Diligence			%	\$ 0.00	
Intelligize			%	\$ 0.00	
Lexis		<	%	\$ 2,000.00	
Practical Guidance		<ul><li>✓</li></ul>	%	\$ 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 6	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.

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Greate Report	Create Report 424WW4ZQK LexisNexis - Canada - LNAC Demo Billing & Allocation Internal Allocation			(	?) Quick Tutorial
Report Layouts	Date Range  Standard Date Range: Month to date (01-Apr-2024 - 01-Apr  Select Month  Custom Date Range		Data Statement Data has been processed through 01- APR-2024. February 2024 billing data is final.		
Fixed Rate Allocation	Cost Recovery: Zero Priced Select Method: 1 8 Custom Allocation v	IEvents: (i) Include  Apply Custom Allocation: (i) None Selected TEST CUSTOM	)	Partial month data is prei full month data is availab Custom Allocation Templa applied to data prior to 01 A report is not a bill. Rep intended for reporting pu	iminary until e. te cannot be -APR-2024. <b>-Drts are</b> <b>rposes only.</b>



- 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			
A Report Layouts	Date Range			
© Custom Allocation	<ul> <li>Standard Date Range: Month to date (01-Apr-2024 - 01-Apr-2024)</li> <li>Select Month</li> <li>Custom Date Range</li> </ul>			
<b>I</b> Fixed Rate Allocation	Cost Recovery: Zero Priced Events: (i) Include			
S Internal Allocation	Select Method: i)     Apply Default Allocation: i)       Default Allocation     Distribute use by Gross Amount			
C 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.