File & ServeXpress™

My Profile -
User Guide

Last Updated: 2/3/2017

File & Serve*Xpress*

My Profile

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File & ServeXpress Resources

File & Serve*Xpress* has many resources available to you in order to address your questions and concerns.

- **File & Serve*Xpress* 24/7 Client Support** is available to assist you with technical, ID, functionality and any other questions you may have. You can contact Client Support at 1-888-529-7587.

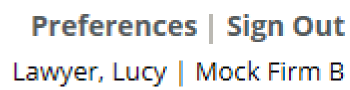
- **File & ServeXpress Resource Center** is available within File & ServeXpress by clicking on the Resource Center link at the bottom of your screen. The Resource Center contains our training registration information, jurisdiction specific rule & procedures, user guides, best practices, pricing and much more!

- **File & ServeXpress Login Page** **https://secure.fileandservexpress.com/Login/Login.aspx** is where you can find password help, what's new and any important information like scheduled maintenance or system changes.

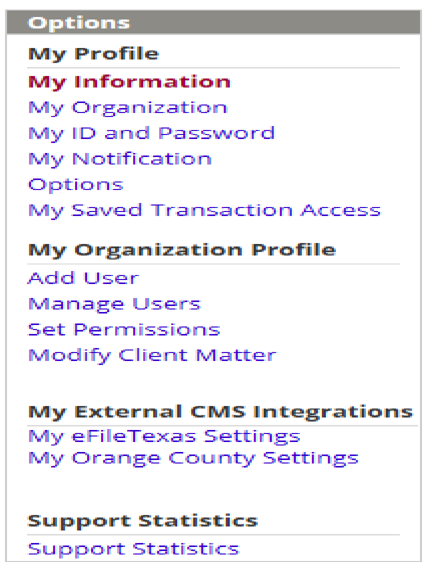
- **File & ServeXpress Notices** is an information page that is available on the top, right-hand side of the File & ServeXpress Home tab, once you sign into File & ServeXpress. This page will provide you with any critical information, such as system maintenance or downtime, changes in fees, legal notices, litigation launches and much more.

My Profile Overview

File & ServeXpress is a self-service system when it comes to updating User settings. To update personal information and user preferences, users can click on the “Preferences” link located in the upper right corner of the File & ServeXpress Home Page.



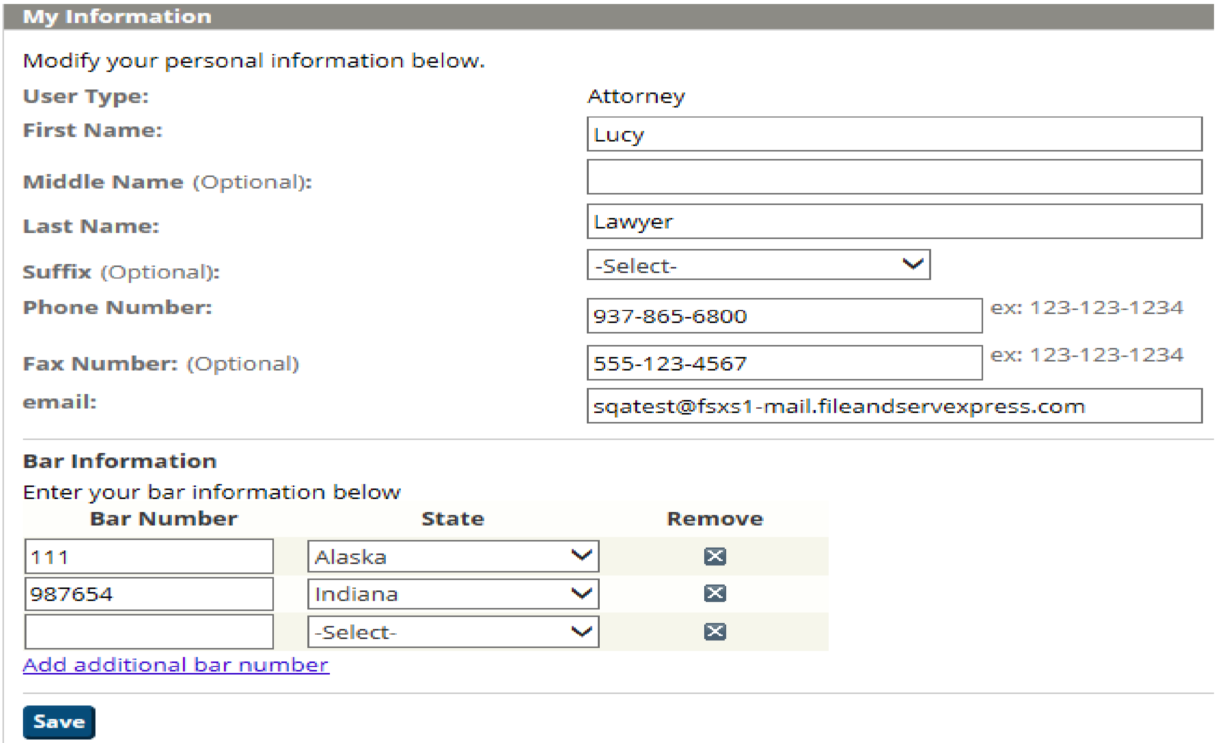
Once the screen refreshes, information can be maintained using the links located on the left side of the screen in the **My Profile** section of the page. The system will default to the “My Information” link when “Preferences” is opened.

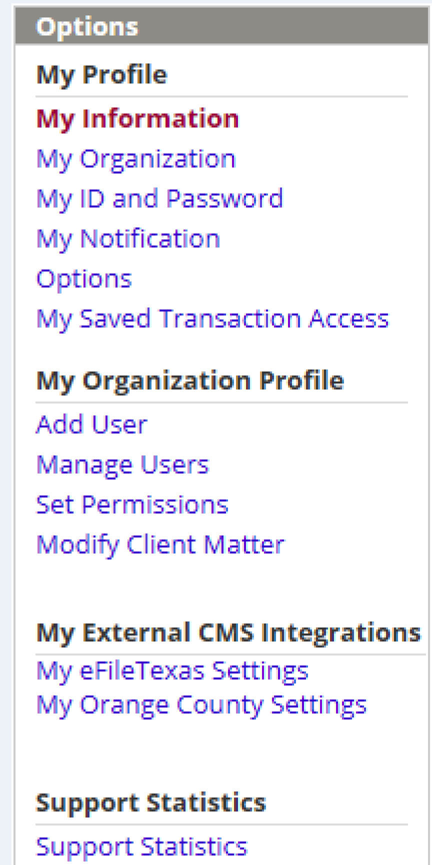


My Profile Tips:

- ✓ **Note:** The *My Organization Profile* section is where the Organization Administrator will go to conduct items such as adding/deleting users and setting permissions – please see My Organization Profile- Organization Administrator User Guide for more information.

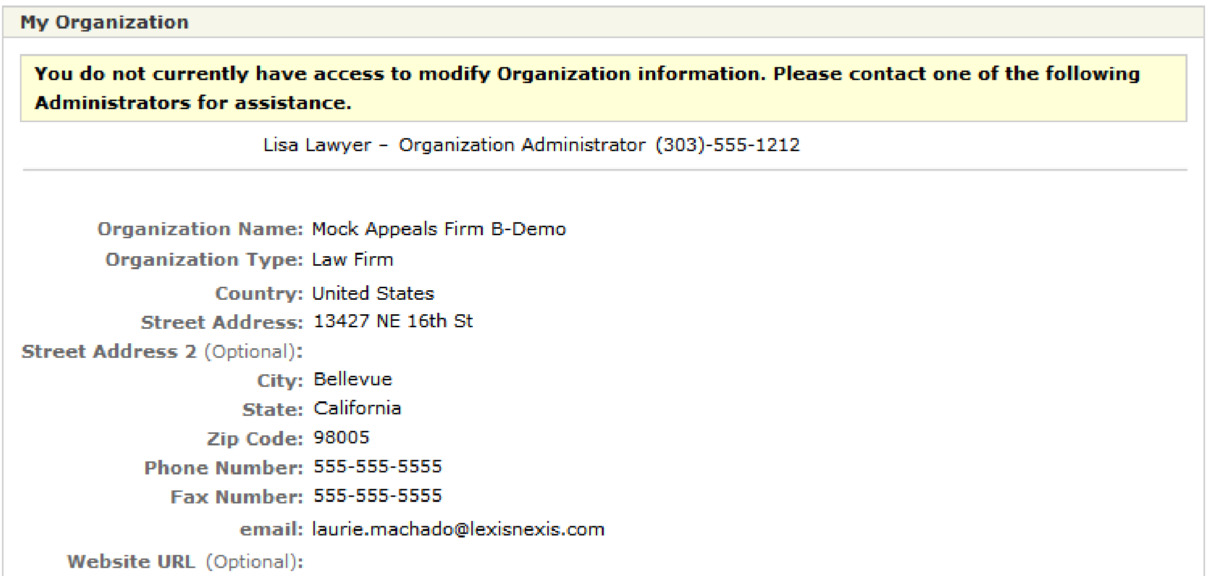
My Information Link

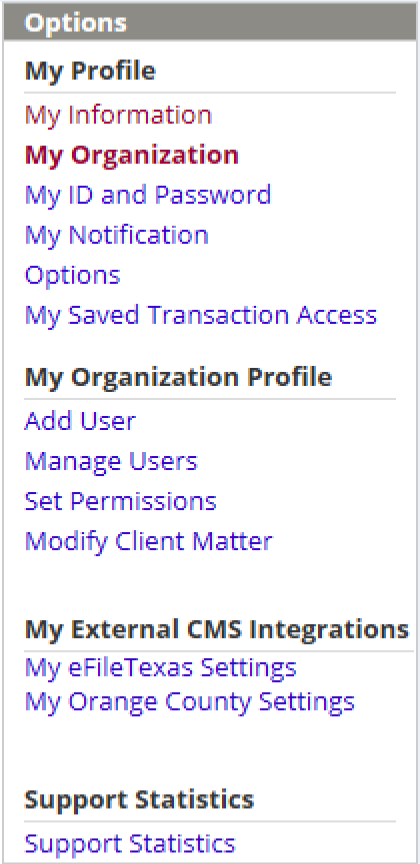




1. The **My Information** link allows users to modify their personal information including contact numbers and email address. It is important to keep this information current, especially your email address as this is the address where all email notifications will be sent.
   a. Use the drop down menus (where provided) to select appropriate information.
   b. Type the new information in the blank fields.
   c. Click the “Save” button to ensure that your changes are updated in the system.

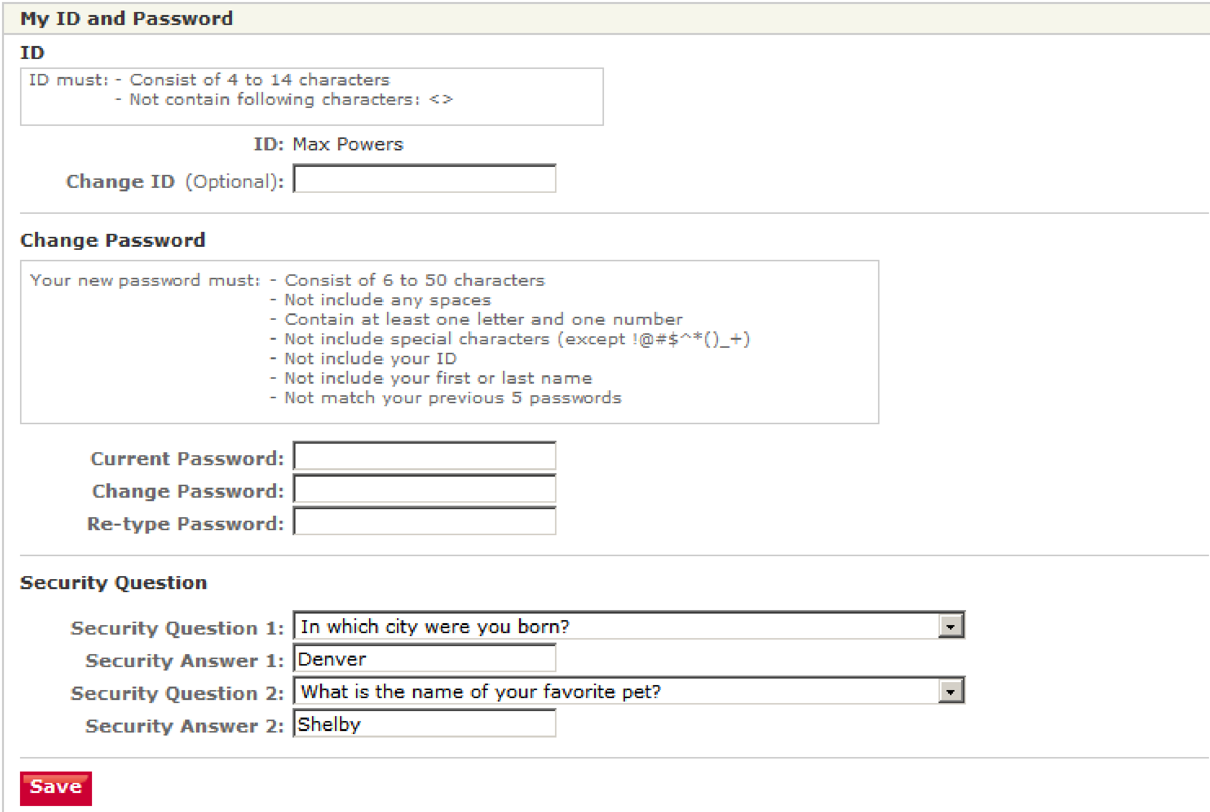
My Organization Link





1. The **My Organization** link allows Organization Administrator's to edit the organization information, update the primary contact, choose invoice options, enter a billing contact, create mandatory billing references, and enable notes.
2. Only Organization Administrators (OA's) have the rights to change this information. If you are not sure who your OA is, you can find their name and contact information at the top of the "My Organization" page.

My ID and Password Link



1. The **My ID and Password** link allows users to change their ID and Password at their discretion. Be sure to read the caveats provided before making the changes.
    a. Type the new information in the blank fields.
    b. Click the “Save” button to ensure that your changes are updated in the system.
2. Users may also enter Security Questions/Answers in cases of forgotten login information.
    a. Use the drop down menus to select Security questions.
    b. Type the new information in the blank fields.

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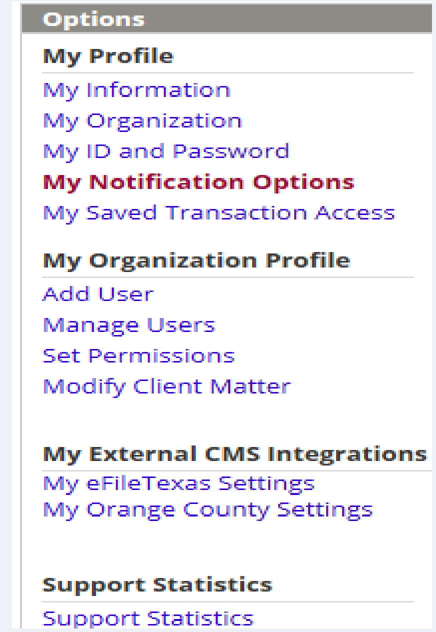
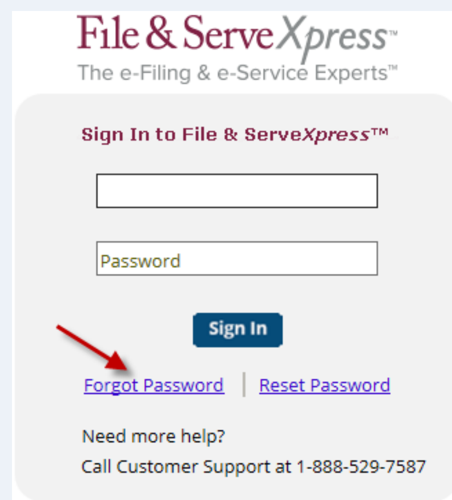


My ID and Password Link Tips:

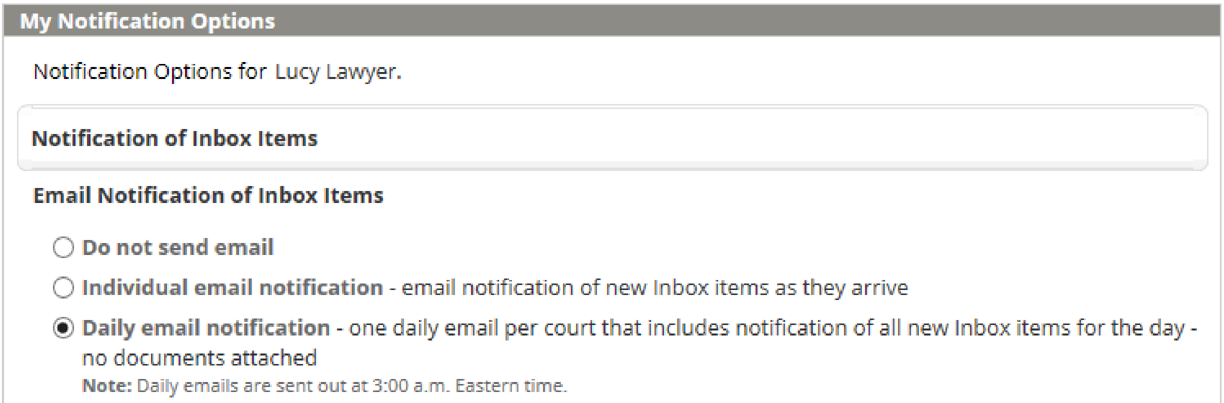
✓ **“Forgot Password” link:** Security questions/answers can be retrieved with the “Forgot password” link on the File & ServeXpress login page.



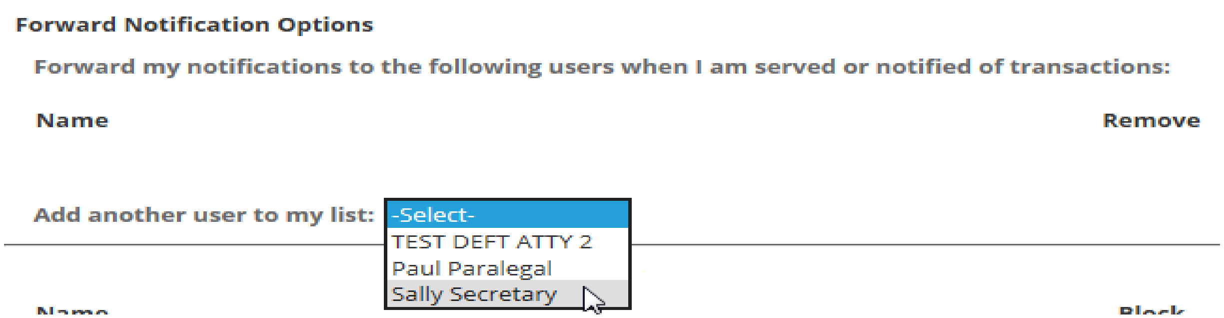
c. Click the “Save” button to ensure that your changes are updated in the system.

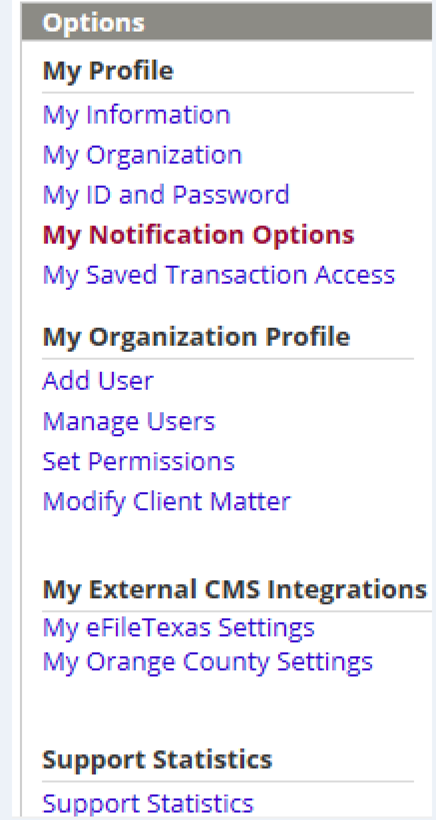
My Notification Options Link

1. The **My Notification Options** link allows users to set up complimentary email notifications for inbox items, message boards, and electronic invoices.



2. <u>**Attorney**</u> users can forward **Email Notification of Inbox Items** to other organization members by using “Forward Notification Options”**:**
    a. Use the radio buttons to select the type of email notification desired.
    b. Use the drop-down menu to select individuals to be “copied” on inbox items.
    c. Click the “Save” button to ensure that your changes are updated in the system.





My Notification Option Link Tips:

- ✓ **Note:** All email notifications are complimentary and are not guaranteed. Items that have been electronically served are guaranteed to arrive in users’ Inboxes. We suggest checking the Inbox daily for the most current service information.
- ✓ **Removing a user from the list:** to delete a user from the notification, click the “X” next to the user. To “block” a user from sending notifications to you, select that user in the “Block” drop-down menu.

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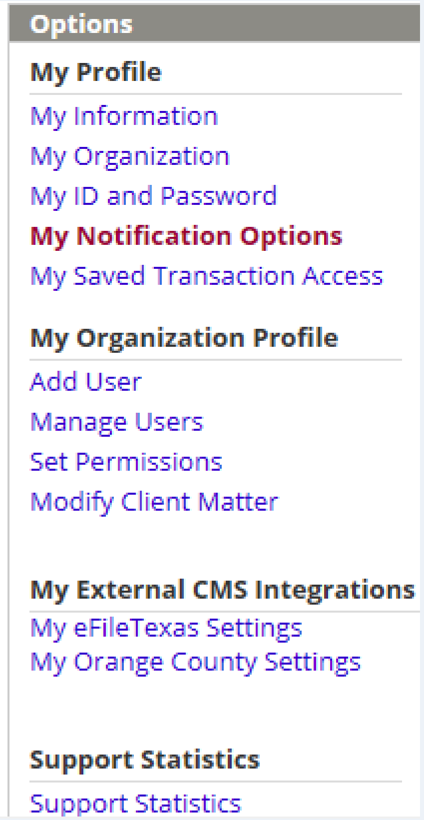
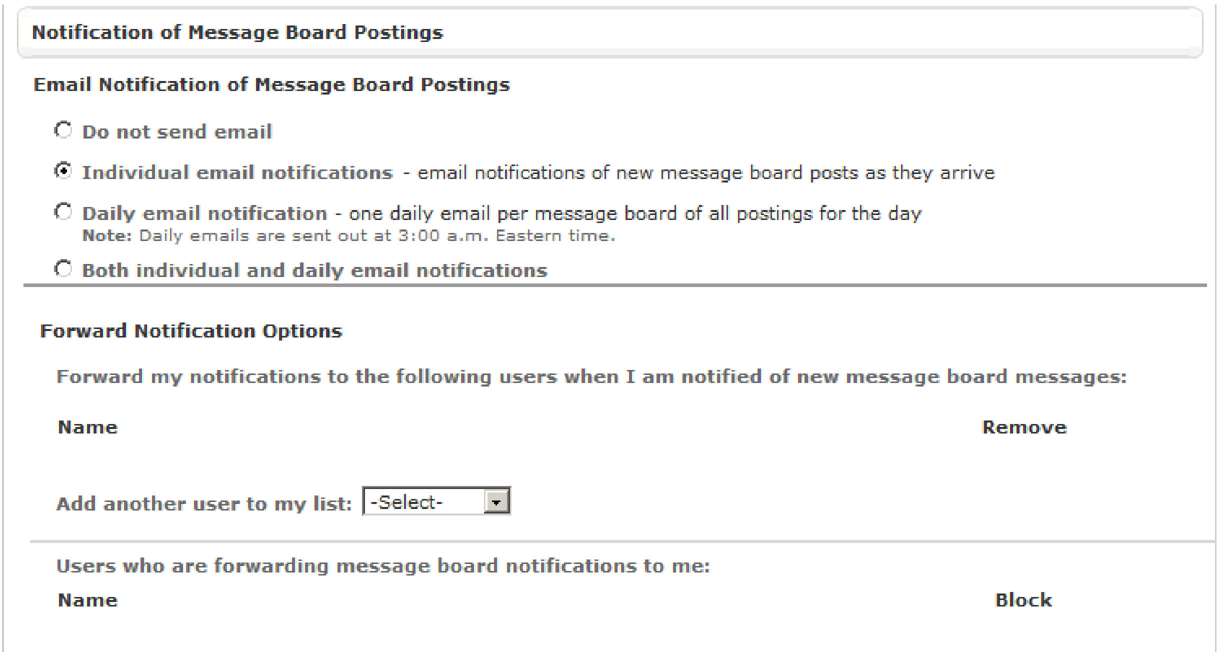
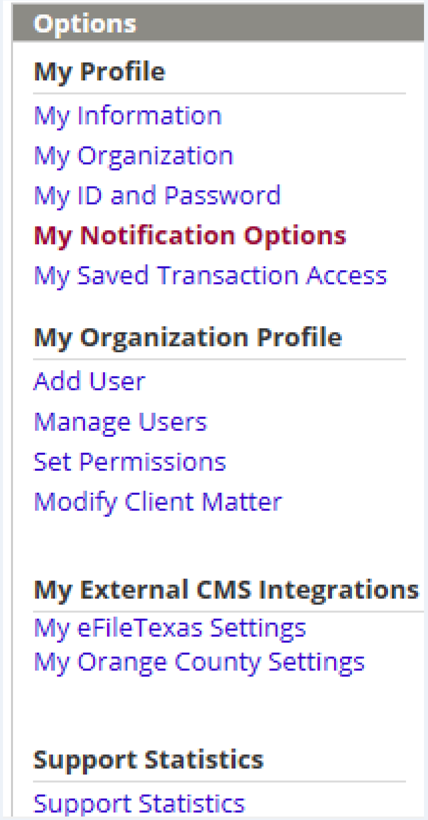
3. **<u>Non-Attorney</u>** users can use "Receive Notification Options" to set up **Email Notification of Inbox Items** that are served on attorneys within their organization**:**
    a. Use the radio buttons to select the type of email notification desired.
    b. Use the drop-down menu to select individuals to be "copied" on their inbox items.
    c. Click the "Save" button to ensure that your changes are updated in the system.



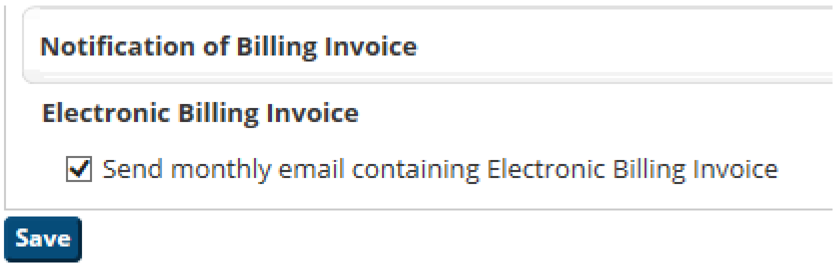


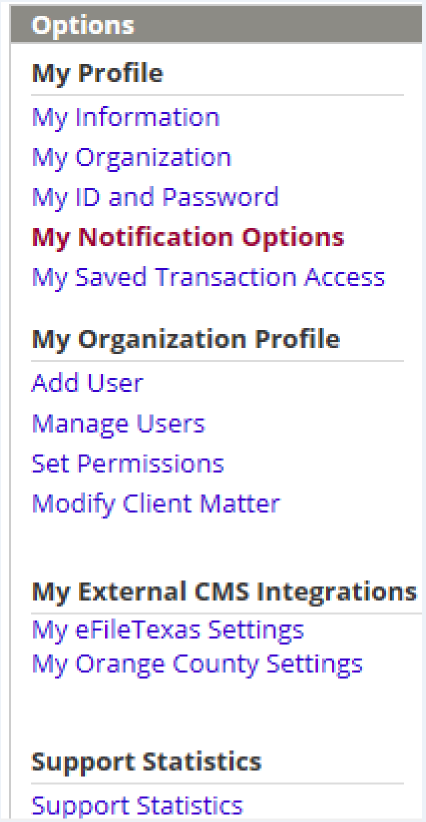


4. For **Email Notification of Message Board Postings, <u>Attorney</u>** users should use “Forward Notification Options”**:**
    a. Use the radio buttons to select the type of email notification desired.
    b. Use the drop-down menu to select individuals to be “copied” on message board postings.
    c. Click the “Save” button to ensure that your changes are updated in the system.

5. For **Email Notification of Message Board Postings, Non-Attorney** users should use “Receive Notification Options”**:**
   a. Use the radio buttons to select the type of email notification desired.
   b. Use the drop-down menu to select individuals to be “copied” on their message board postings.
   c. Click the “Save” button to ensure that your changes are updated in the system.

6. For **Notification of Billing Invoice:**
   a. Use the check box to select or de-select the option to receive an automatic email containing the firms invoice.
   b. Click the “Save” button to ensure that your changes are updated in the system.





My Saved Transaction Access Link

1. The **My Saved Transaction Access** link allows users to give other firm members access to their “Saved Transactions” queue (located on the Filing & Service tab).
    a. Use the drop-down menu to grant individuals access to saved transactions.
    b. To remove a user, click the “X” next to the user.