

File & Serve *Xpress*™

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## Organization Profile - User Guide



# **File & Serve*Xpress***

## **My Organization Profile- Organization Administrator**

### Table of Contents

**Organization Administrator Overview.....4**  
**Add User Link.....5**  
**Manage Users Link .....6**  
**Set Permissions Link.....7**  
**Modify Client Matter Link .....8**  
**My Organization Link ..... 10**

## File & ServeXpress Resources

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

- **File & ServeXpress 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.

## Organization Administrator Overview

### What is an Organization Administrator?

An Organization Administrator (“OA”) is an individual or group of individuals who have been granted special File & ServeXpress permissions. The OA can make any necessary changes to user information and maintain other information pertaining to the organization’s File & ServeXpress account.

Every organization registered with File & ServeXpress must have at least one user selected as an OA.

### Where are the permissions accessed?

To access the OA permissions, click on the [Preferences](#) link in the upper right corner of the File & ServeXpress Homepage after logging into the application. Then, choose links using the Options box on the left side of the page.

### What permissions are given to the OA?

An OA is given the authority to Add Users, Manage Users, Set Permissions, Modify Client Matter, and Update/Change Organization Information.

### What is a National Organization Administrator?

A National Organization Administrator (“NOA”) is an individual or a group of individuals who have the ability to manage users and firm profiles across *multiple offices* without maintaining separate File and ServeXpress user names for each office. A firm can designate more than one user as a NOA.

## Tips for Organization Administrators:

- ✓ **24/7 Access:** You can make changes to your organization’s account any time you have access to File & ServeXpress. Call our 24/7 Client Service line whenever you need our help.
- ✓ **National Organization Administrator Set up:** Call File & ServeXpress Client Service at 888-529-7587 to designate an NOA for your firm. Be prepared with your firm name and office locations that should be related, the “main” office location, and the User ID of the newly appointed NOA.

# Add User Link

**Add User**

Add a new user to Mock Firm B by completing the fields below.

**User Type:** Attorney

**First Name:**

**Middle Name (Optional):**

**Last Name:**

**Suffix (Optional):** -Select-

**Phone Number:**  ex: 123-123-1234

**Fax Number (Optional):**  ex: 123-123-1234

**email:**

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**Bar Information**

Enter bar information below

Bar Number	State	Remove
<input type="text"/>	-Select- <input type="text"/>	✕
<input type="text"/>	-Select- <input type="text"/>	✕
<input type="text"/>	-Select- <input type="text"/>	✕

[Add additional bar number](#)

1. The **Add User** link allows OA’s to create additional User ID’s in their firm.
  - a. Complete the open type fields and drop down menus.
  - b. Click the “Save” button at the bottom of the page to submit the request.
  - c. A welcome email will be sent to the new User within 48 hours with a login ID and temporary password.
2. Additional Bar Numbers/States can be added for “Attorney” Users. “Staff Member” users will not be required to add a Bar Number.

**Options**

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**My Profile**

- [My Information](#)
- [My Organization](#)
- [My ID and Password](#)
- [My Notification](#)
- [Options](#)
- [My Saved Transaction Access](#)

---

**My Organization Profile**

- Add User**
- [Manage Users](#)
- [Set Permissions](#)
- [Modify Client Matter](#)

---

**My External CMS Integrations**

- [My eFileTexas Settings](#)
- [My Orange County Settings](#)

---

**Support Statistics**

- [Support Statistics](#)


## Add User Link Tips:

- ✓ **New User Email:** If the New User does not receive a welcome email within 48 hours, please call File & ServeXpress Customer Service for assistance.
- ✓ **Bar Number Information:** If your State does not use Bar Numbers, simply type “NA” into the Bar Number open type field.

## Manage Users Link

Manage Users					
Edit, Remove or Transfer users within Mock Firm B.					
Name	ID	User Type	email	Edit	Remove or Transfer
ATTY 2, TEST DEFT	ATTY 2, TEST DEFT	Attorney	sqatest@fsxs1-mail.fileandservexpress.com	<a href="#">edit</a> ▾	✕
Lawyer, Lucy	lucy lawyer	Attorney	sqatest@fsxs1-mail.fileandservexpress.com		
Litigator, Larry	larry litigator	Attorney	sqatest@fsxs1-mail.fileandservexpress.com		
Paralegal, Paul	paul paralegal	Staff Member	sqatest@fsxs1-mail.fileandservexpress.com	<a href="#">edit</a> ▾	✕
Secretary, Sally	sally secretary	Staff Member	sqatest@fsxs1-mail.fileandservexpress.com	<a href="#">edit</a> ▾	✕

- User Information
- Notification Options
- Saved Transaction Access
- Reset & email Password

1. The **Manage Users** link allows OA's to edit, remove, or transfer any of the organization's current users.
2. Use the "Edit" drop down menu to update:
  - a. User Information- phone, fax, email, etc.
  - b. Notification Options- select recipients to receive service.
  - c. Saved Transaction Access- allow others in the firm to share access to Saved Transactions.
  - d. Reset & email Password- generate a new temporary password email for Users.
3. Click on the "Remove Or Transfer"  box next to a User to:
  - a. Delete a User from a firm.
  - b. Transfer a User to another firm. When transferring a User, the system will prompt for the name of the organization to transfer the User to.

**Options**

**My Profile**

- [My Information](#)
- [My Organization](#)
- [My ID and Password](#)
- [My Notification](#)
- [Options](#)
- [My Saved Transaction Access](#)

**My Organization Profile**

- [Add User](#)
- Manage Users**
- [Set Permissions](#)
- [Modify Client Matter](#)

**My External CMS Integrations**

- [My eFileTexas Settings](#)
- [My Orange County Settings](#)

**Support Statistics**

- [Support Statistics](#)

## Set Permissions Link

Name	ID	email	Organization Administrator	Reset Password	Modify Organization	Remove User	Add/Modify User
ATTY 2, TEST DEFT	ATTY 2, TEST DEFT	sqatest@fsxs1-mail.fileandservexpress.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lawyer, Lucy	lucy lawyer	sqatest@fsxs1-mail.fileandservexpress.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Litigator, Larry	larry litigator	sqatest@fsxs1-mail.fileandservexpress.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Paralegal, Paul	paul paralegal	sqatest@fsxs1-mail.fileandservexpress.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Secretary, Sally	sally secretary	sqatest@fsxs1-mail.fileandservexpress.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Save**

1. The **Set Permissions** link allows OA’s to share Organization Administrator rights with other firm members.
2. Use the series of checkboxes to select/deselect the desired rights and click the “Save” button at the bottom of the page to grant user rights.

**Options**

**My Profile**

[My Information](#)

[My Organization](#)

[My ID and Password](#)

[My Notification](#)

[Options](#)

[My Saved Transaction Access](#)

**My Organization Profile**

[Add User](#)

[Manage Users](#)

**Set Permissions**

[Modify Client Matter](#)

**My External CMS Integrations**

[My eFileTexas Settings](#)

[My Orange County Settings](#)

**Support Statistics**

[Support Statistics](#)

# Modify Client Matter Link

**Modify Client Matter Information**

Modify Client Matter information for Mock Firm B.

Search for client matter information by completing at least one field below.

**First Name:**

**Middle Name:**

**Organization/Last Name:**

**Suffix:**

**Case Name:**

**Case Number:**

**Find**

1. The **Modify Client Matter** link allows OA's to add or edit client/matter numbers so that they will automatically appear on the firm's monthly invoice when a transaction takes place involving that specific case/matter.
  - a. Search for client matter information by entering information in the blank fields and drop-down menu and click "Find".
  - b. Scroll through the list of information provided to manually locate client.
  - c. Click "Edit".

Results: 1 - 10 of 448 Results per page: 10

Pages: < Prev 1 [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [10](#) ... [Next](#) >

<u>Client Name</u> ▲	<u>Court</u>	<u>Case Name</u>	<u>Case Number</u>	<u>Client Number</u>	<u>Matter Number</u>	<u>Edit</u>
A B C Auto Inc	Mock Court-Filing & Serving	Smith, James vs A B C Auto Inc	15CV12345			<a href="#">edit</a>
A B C Corp	Mock Court (for tutorial purposes only)	Doe, Jeff vs A B C Corp et al	2012cv9999			<a href="#">edit</a>

**Options**

**My Profile**

- [My Information](#)
- [My Organization](#)
- [My ID and Password](#)
- [My Notification](#)
- [Options](#)
- [My Saved Transaction Access](#)

**My Organization Profile**

- [Add User](#)
- [Manage Users](#)
- [Set Permissions](#)
- [Modify Client Matter](#)**

**My External CMS Integrations**

- [My eFileTexas Settings](#)
- [My Orange County Settings](#)

**Support Statistics**

- [Support Statistics](#)

## Modify Client Matter Link Tips:

- ✓ **Note:** The OA can also mandate the entering of firm codes to all billable sections of the system, so that those codes appear next to all entries on the invoice. See the "My Organization" link section below for details.



**Edit Client Matter Number**

Modify your client information here

**1. Enter or edit the matter number for this case**

Court Name: Mock Court-Filing & Serving  
Case Name: Smith, James vs A B C Auto Inc  
Case Number: 15CV12345  
Matter Number:

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**2. Enter or edit the client number for this client**

Client Name: Mock Court-Filing & Serving  
Client Number:

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**3. Is this client number applicable for all cases in which your organization represents this client?**

Yes, please use this client number for this client in all cases.  
 No, only apply this client number for this client in this case.

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- d. Enter your new information in the “Matter Number” and “Client Number” fields.
- e. Click the radio button next to **Yes**, please use this client number for this client in all cases or **No**, only apply this client number for this client in this case.
- f. Click **Save** to save your changes and return to the Modify Client Matter Information screen.

# My Organization Link

**My Organization**

Edit Organization contact information for Mock Firm B below.

**Organization Name:**

**Organization Type:** Law Firm

**Country:**  ▼

**Street Address:**

**Street Address 2 (Optional):**

**City:**

**State:**  ▼

**Zip Code:**  -  ex: 12345-6789

**Phone Number:**  ex: 123-123-1234

**Fax Number (Optional):**  ex: 123-123-1234

**email:**

**Website URL (Optional):** http://

1. The **My Organization** link allows OA'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. To edit the **organization contact information:**
  - a. Type the new information in the blank fields.
  - b. Use the drop down menus to select Country and State.
  - c. Click the "Save" button to ensure that your changes are updated in the system.

**Primary Contact**

The person who serves as the primary contact in this organization.

**Primary Contact Name:**  ▼

**Options**

**My Profile**

- [My Information](#)
- My Organization**
- [My ID and Password](#)
- [My Notification](#)
- [Options](#)
- [My Saved Transaction Access](#)

**My Organization Profile**

- [Add User](#)
- [Manage Users](#)
- [Set Permissions](#)
- [Modify Client Matter](#)

**My External CMS Integrations**

- [My eFileTexas Settings](#)
- [My Orange County Settings](#)

**Support Statistics**

- [Support Statistics](#)

3. To edit the **primary contact information**:

- a. Use the drop down menu to select contact.
- b. Click the “Save” button to ensure that your changes are updated in the system.

**Invoice Options**  
Mock Appeals Firm A-Demo's preferred method of receiving invoices from File & Serve:

**Electronic Invoices only**  
Sends Electronic Invoice via email.  
Email:

**Paper Invoices**  
(Mailed to the physical address above via US mail. Additional fees will apply.  
See posted price sheets for details.)

4. To choose **invoice options**:

- a. Click either the “Electronic” or “Paper” invoices radio button.
- b. Type email in blank field for electronic invoices.
- c. Paper invoices will be sent to the address on file.
- d. Click the “Save” button to ensure that your changes are updated in the system.

**Billing Contact**  
The person in Mock Appeals Firm A-Demo who serves as the contact for billing information. **Note:** The Primary contact is the default Billing contact.  
You can change the Billing Contact below.

**Billing Contact Name:**

5. To edit the **billing contact information**:

- a. Use the drop down menu to select contact.
- b. Click the “Save” button to ensure that your changes are updated in the system.

**Options**

**My Profile**

- [My Information](#)
- My Organization**
- [My ID and Password](#)
- [My Notification](#)
- [Options](#)
- [My Saved Transaction Access](#)

**My Organization Profile**

- [Add User](#)
- [Manage Users](#)
- [Set Permissions](#)
- [Modify Client Matter](#)

**My External CMS Integrations**

- [My eFileTexas Settings](#)
- [My Orange County Settings](#)

**Support Statistics**

- [Support Statistics](#)

### Mandatory Billing Reference

You may require File & Serve users in your organization to enter a billing reference for each charge incurred.

Select when users within **Mock Appeals Firm A-Demo** are required to enter a billing reference:

[Select All](#) | [De-Select All](#)

- Submit Filing & Service transaction
- Create an alert
- Search
  - Search a document/transaction
  - Search a case history
  - Search for cases
  - Search a daily docket
  - Search a transaction status
- Purchase a document
- Calendar Events Search
- Transaction Report
- View Read Status
- Message Board
- Document Upload

#### 6. To select **charges to be mandated for billing references:**

- a. Use the series of checkboxes to select/deselect the charges for mandatory billing information.
- b. Use the “Select All” and “De-Select All” links to choose all or un-choose all boxes at once.
- c. Click the “Save” button to ensure that your changes are updated in the system.

### Options

#### My Profile

[My Information](#)

#### My Organization

[My ID and Password](#)

[My Notification](#)

[Options](#)

[My Saved Transaction Access](#)

#### My Organization Profile

[Add User](#)

[Manage Users](#)

[Set Permissions](#)

[Modify Client Matter](#)

#### My External CMS Integrations

[My eFileTexas Settings](#)

[My Orange County Settings](#)

#### Support Statistics

[Support Statistics](#)

7. To enable or disable **notes for custom document list, case notes, or document notes:**
  - a. Use the series of checkboxes to select/deselect the notes to be enabled/disabled.
  - b. Click the “Save” button to ensure that your changes are updated in the system.

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**Notes**

You may allow File & ServeXpress users in your organization to enter notes for:

- Custom Document List Notes
- Case Notes (available in Case History)
- Document Notes (available in Case History)

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**Save**

**Options****My Profile**

[My Information](#)

**My Organization**

[My ID and Password](#)

[My Notification](#)

[Options](#)

[My Saved Transaction Access](#)

**My Organization Profile**

[Add User](#)

[Manage Users](#)

[Set Permissions](#)

[Modify Client Matter](#)

**My External CMS Integrations**

[My eFileTexas Settings](#)

[My Orange County Settings](#)

**Support Statistics**

[Support Statistics](#)