

File & Serve *Illinois*™

# USER GUIDE

Firm Administrator



# File & Serve *Illinois*

## FIRM ADMINISTRATOR

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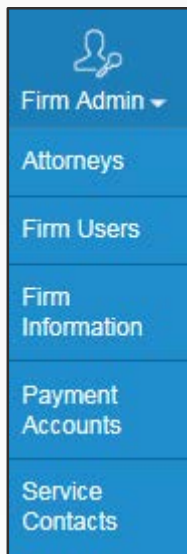
## FILE & SERVE ILLINOIS RESOURCES

File & Serve Illinois has many resources available to you in order to address your questions and concerns:

- **File & Serve Illinois Client Support** is available to assist you with technical, ID, functionality and any other questions you may have. You can contact Client Support at 888.529.7587.
- **File & Serve Illinois Web Site** contains helpful information for using the File & Serve Illinois system. The File & Serve Illinois Web Site houses our training registration information, user guides, pricing, and more. Click [here](#) to access the web site.
- **File & Serve Illinois Login Page** is where you can find password help, a link to the registration page, and links for help and contact information. Click [here](#) to access the login page.
- **Supreme Court of Illinois Electronic Filing Procedures and User Manual** contains the definitions and rules published by the Supreme Court. Click [here](#) to access the document.

# FILE & SERVE ILLINOIS FIRM ADMINISTRATOR OVERVIEW

This File & Serve Illinois User Guide provides a convenient source of information to help you efficiently make updates to your account as a firm administrator. The administrator has the following dropdown list on their dashboard:



## Before You Begin

1. Refer to the appropriate court rules on electronic filing prior to using File & Serve Illinois to ensure that you are in compliance with local requirements.
2. Check our minimum system requirements to be sure your computer is correctly configured for using File & Serve Illinois.
3. If you need assistance, call our Client Support line at 1-888-529-7587.

## Logging in to File & Serve Illinois

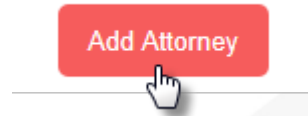
A white login form on a dark blue background. It has two input fields: 'Username' with an envelope icon and 'Password' with a lock icon. Below the fields is a blue 'Login' button. At the bottom, there is a link: 'Forgot password ? | Register with E-mail'.

1. Before using File & Serve Illinois, you must have an ID and Password. If you do not have these, click the *Register with E-mail* link on the Login page.
2. Open your internet browser and click [here](#) to access the login page.
3. Enter your ID and password and click **Login**.

## ATTORNEYS TAB

To add an Attorney, follow these steps:

1. Click on the “Add Attorney” button:



2. This will open a new screen:

Create New Attorney ✕



First Name

Middle Name

Last Name

Bar Number  
 ✕

3. Enter the attorney’s information and click “Save” to add them to the attorney list.

First Name	Last Name	Bar Number	Actions
FSI Training	Attorney	888888	 

## ATTORNEYS TAB - Searching for an attorney

Users have the ability to search for an attorney by first name, last name, and/or bar numbers.

1. Enter any/all of the users information and click “Search”:
2. This will populate the screen with the user(s) that match your search criteria.
3. Results will be sorted alphabetically by last name, first name.
4. Click on the Paper & Pencil icon to edit the user.
5. Click on the Trashcan icon to delete the user.

### Manage Attorneys for your Firm

First Name

Last Name

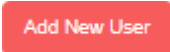
Bar Number

[Add Attorney](#) [Search](#)

First Name	Last Name	Bar Number	Actions
Jane	Doe	888888	<a href="#">✎</a> <a href="#">🗑</a>
Brian	Heard	888888	<a href="#">✎</a> <a href="#">🗑</a>
Lisa	Jones	888888	<a href="#">✎</a> <a href="#">🗑</a>

## FIRM USERS TAB

To add a new user, follow these steps:

1. Click on the “Add New User” button: 
2. This will open a new screen:

Create New User ✕

First Name



Middle Name

Last Name

Email

Roles  
 Firm Admin  Filer

3. Enter the user’s information, choose their role, and click “Save” to add them to the user list.

First Name	Last Name	Email	Role	Status	Action	
Training	Admin	fsil_training@outlook.com	Filer, Firm Admin	Active		<a href="#">Reset Password</a>
Training	Non-Admin	fsil_training+1@outlook.com	Filer	Active	 	<a href="#">Reset Password</a>

## FIRM USERS TAB - Searching for a user

Users have the ability to search for a user by first name, last name, email, and/or role.

1. Enter any/all of the users information and click “Search”:
2. This will populate the screen with the user(s) that match your search criteria.
3. Results will be sorted alphabetically by last name, first name.
4. Click on the Paper & Pencil icon to edit the user.
5. Click on the Trashcan icon to delete the user.
6. Click “Reset Password” to enter a new password for the user.

### Manage Users For Your Firm

First Name

Last Name

Email

Role

[Add New User](#) [Search](#)

First Name	Last Name	Email	Role	Status	Action	
Training	Admin	fsil_training@outlook.com	Filer, Firm Admin	Active		<a href="#">Reset Password</a>
Training	Non-Admin	fsil_training+1@outlook.com	Filer	Active		<a href="#">Reset Password</a>



## FIRM INFORMATION TAB

To update any of your firm's information, make your changes in the fields provided and click "Save":

### Firm Information

Firm Name  
Mock Firm A- Irving

Country  
United States

Address Line1  
500 E. John Carpenter Fwy

Address Line2

City  
Irving

State  
Texas

Zipcode  
75062

Phone Number  
(555) 555-5555

[Cancel](#) [Save](#)

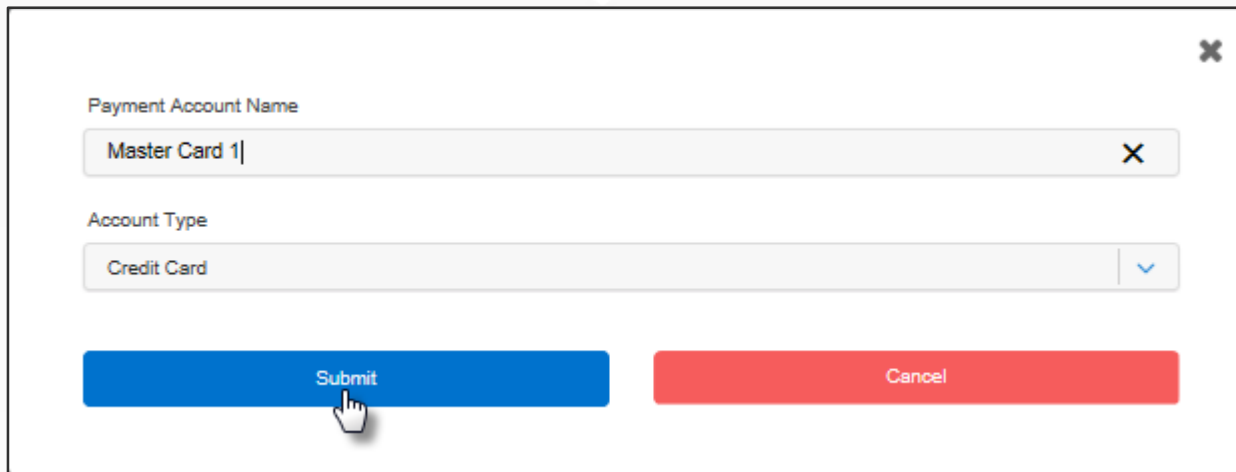
## PAYMENT ACCOUNTS TAB

To add a credit card account (adding a waiver account follows), follow these steps:

1. Click on the “Add Account” button:



2. This will open a new screen:

A screenshot of a modal form titled "Add Account". The form has a white background and a grey border. At the top right corner, there is a small grey 'X' icon. The form contains two input fields: "Payment Account Name" with the text "Master Card 1" and a grey 'X' icon on the right; and "Account Type" with a dropdown menu showing "Credit Card" and a blue downward arrow. At the bottom, there are two buttons: a blue "Submit" button and a red "Cancel" button. A white mouse cursor is pointing at the "Submit" button.

3. Enter the payment account name, choose the account type, credit card, and click “Submit”.
4. You will be redirected to a new page to complete the process.
5. Choose the Method of Payment:

A screenshot of a form section titled "Payment Information" in green text. Below the title is a white box containing a "Method of Payment" section. It has two radio button options: "Credit Card" (which is selected) and "e-Check".

# PAYMENT ACCOUNTS TAB (continued)

6. Enter the credit card information and click "Continue":

**Cardholder Information**  
Enter the information as it appears on the Cardholder Account. The fields marked with a red asterisk (\*) are required fields.

Card Type	Visa	*
Card Number	XXXXXXXXXXXX	*
Exp Month	12	*
Exp Year	2019	*
CVV Code	XXX	*
Name on Card	Training Attorney	*
Address Type	<input checked="" type="radio"/> US <input type="radio"/> Foreign	
Address Line 1	123 Fake Street	*
Address Line 2		
City	Irving	*
State	TEXAS	
Zip Code	75062	

[CVV Help](#)

Continue

7. Verify the credit card information and click "Save Information":

**Verify Billing Information**

<b>Billing Detail</b>	
Card Type	VISA
Card #	XXXXXXXXXXXX1881
Exp Date	12/17
CVV Code	***
Name on Card	Training Attorney
Address Type	US
Address Line 1	123 Fake Street
Address Line 2	
City	Irving
State	TX
ZIP Code	75062

**Terms and Conditions**  
This is a confidential and secure site that does not disseminate confidential information to third parties. The effective date of the payment is the date that it is submitted. By selecting the Process Payment button you are authorizing the processing of this transaction.

Back Save Information

## PAYMENT ACCOUNTS TAB *(continued)*

8. The following message will appear:

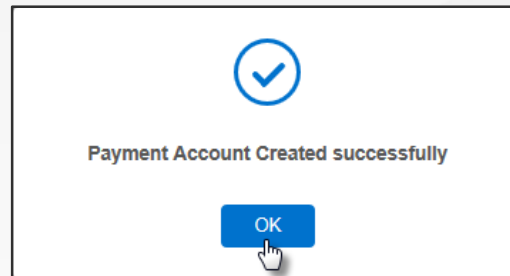
Please do not click the Back button or refresh the page. This page will automatically proceed once payment processing has completed.



8. When processing is complete, you will be directed back to File & Serve Illinois to save the account:

Create Payment Account ✕

Payment Account Name

8. Click "OK" and the account will appear in your accounts list:



Payment Account Name	Payment Account Type	Actions
Visa 1	Credit Card	 

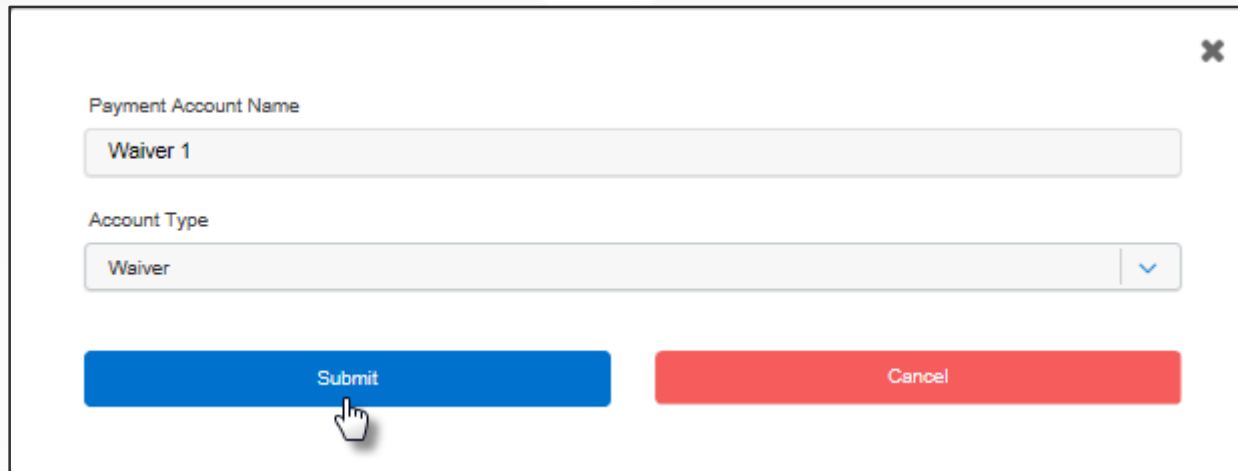
## PAYMENT ACCOUNTS TAB *(continued)*

To add a waiver account, follow these steps:

1. Click on the “Add Account” button:

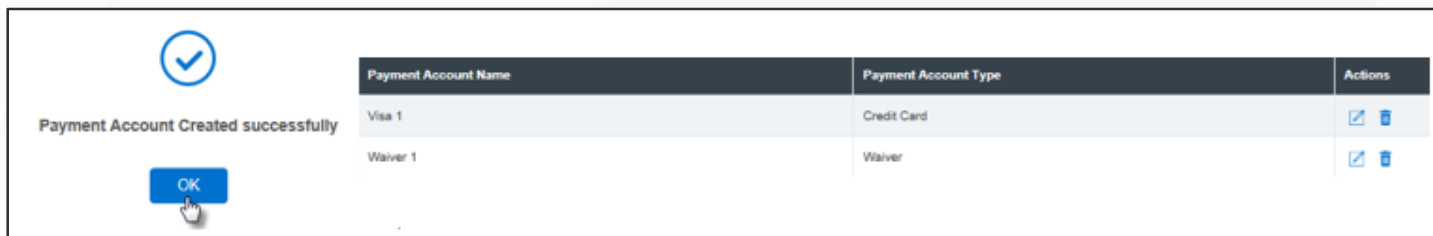


2. This will open a new screen:



A screenshot of a modal form for adding a payment account. It contains two input fields: 'Payment Account Name' with the text 'Waiver 1' and 'Account Type' with a dropdown menu set to 'Waiver'. At the bottom are two buttons: a blue 'Submit' button and a red 'Cancel' button. A mouse cursor is pointing at the 'Submit' button.

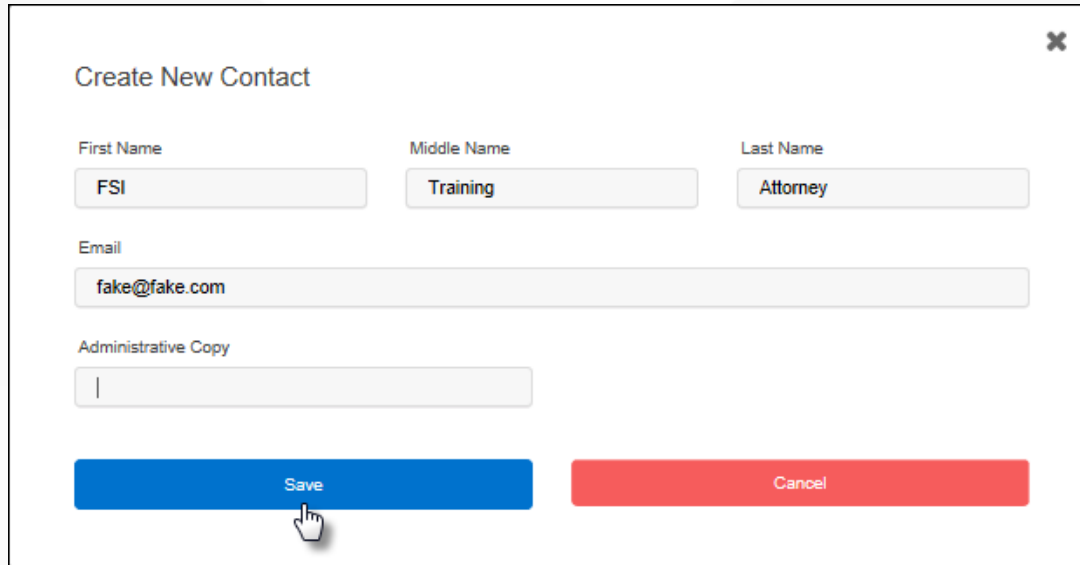
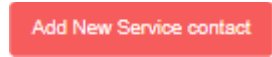
3. Enter the payment account name, choose the account type, Waiver, and click “Submit”.
4. Click “OK” and the account will appear in your accounts list:





## SERVICE CONTACTS TAB

To add a service contact, follow these steps:

1. Click on the “Add New Service Contact” button:
2. This will open a new screen:

A screenshot of a "Create New Contact" form. The form has a title "Create New Contact" and a close button (X) in the top right corner. It contains three input fields for "First Name" (FSI), "Middle Name" (Training), and "Last Name" (Attorney). Below these is an "Email" field with the value "fake@fake.com". There is also an "Administrative Copy" field with a vertical cursor. At the bottom, there are two buttons: a blue "Save" button and a red "Cancel" button. A mouse cursor is pointing at the "Save" button.

3. Enter the service contact’s information.
4. If anyone in your firm needs to be copied on the service contact’s service, enter one or more email addresses separated by commas in the “Administrative Copy” field.
5. Click “Save” to add the contact to your list.

Name	Email Id	Action
FSI Training Attorney	fake@fake.com	 

## SERVICE CONTACT TAB (Continued)

The system automatically sorts service contacts and the results are displayed alphabetically by last name, first name. Use the Pencil & Paper icon to edit the service contact. Use the Trashcan icon to delete the service contact.











### Service Contact

First Name

Last Name

Email Id

[Add New Service contact](#) [Search](#)

Name	Email Id	Action
Bill Jones	Bill@yourfirm.com	 
W K	M.M@MOZATO.COM	 
mdklvsd kdsd	test@yahoo.com	 
New New last	sgollapudi@fileandserve.com	 
Edward Public	erosario@mozato.com	 
Ed23 Rosario	test@vahoo.com	