

File & Serve *Xpress*™

My Organization Profile

User Guide



**My Organization
Profile -
Organization
Administrator**

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File & ServeXpress Resources

File & ServeXpress - Resources Available

- ❖ **File & ServeXpress 24/7 Client Support** is available to assist you with technical, User 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 the File & ServeXpress site by clicking on the Resource Center link at the bottom of your screen. The Resource Center contains our training registration information, jurisdiction specific rules & procedures, user guides, best practices, pricing and much more!
- ❖ **File & ServeXpress Login Page** 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 888-5297587 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.

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Add User Link

File & ServeXpress Preferences

Options

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 - My Organization
 - My ID and Password
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 - My Saved Transaction Access
- My Organization Profile**
 - Add User**
 - Manage Users
 - Set Permissions
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- My External CMS Integrations
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 - Support Statistics

Add User

Add a new user to Ellis, Perry D PC 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:

Bar Information

Enter bar information below

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

[Add additional bar number](#)

[Save](#)

Add User Link Tips:


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

- ❖ 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 Ellis, Perry D PC.					
Name	ID	User Type	email	Edit	Remove or Transfer
De Give, Henry	De Give, Henry	Attorney	sqatest@fsxc1.fileandservexpress.com	edit	
Ellis, Perry	Ellis, Perry	Attorney	sqatest@fsxc1.fileandservexpress.com	edit	
Mills, Angie	Mills, Angie	Staff Member	sqatest@fsxc1.fileandservexpress.com	edit	

User Information
Notification Options
Saved Transaction Access
Reset & email Password



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- ❖ The Manage Users link allows Organization Administrator to edit, remove, or transfer any of the organization's current users.
- ❖ 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.
- ❖ Click on the "Remove Or Transfer" box next to a User to:
 - Delete a User from a firm.
 - 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.

Set Permissions Link



Set Permissions
Grant users within Ellis, Perry D PC to have certain administrative rights. (See below for details)

Name	ID	email	Organization Administrator	Reset Password	Modify Organization	Remove User	Add/Modify User
De Give, Henry	De Give, Henry	sqatest@fsxc1.fileandservexpress.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ellis, Perry	Ellis, Perry	sqatest@fsxc1.fileandservexpress.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mills, Angie	Mills, Angie	sqatest@fsxc1.fileandservexpress.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

[Save](#)

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- ❖ The Set Permissions link allows Organization Administrator to share Organization Administrator rights with other firm members.
- ❖ 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.

Modify Client Matter Link

Modify Client Matter Information

Modify Client Matter information for Ellis, Perry D PC.

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](#)

- ❖ The Modify Client Matter link allows Organization Administrator 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.
- ❖ Search for client matter information by entering information in the blank fields and drop-down menu and click “Find”.



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My External CMS Integrations

Support Statistics

- [Support Statistics](#)

Modify Client Matter Link Continued



Results: 1 - 10 of 71 Results per page: 10

Pages: < Prev 1 2 3 4 5 6 7 8 Next >

Client Name ▲	Court	Case Name	Case Number	Client Number	Matter Number	Edit
Adams, Rachel	GA State Court of Fulton County	Adams, Rachel vs Marvin L Clark	12EV015172Y			edit
Blanks, Tiffany	GA State Court of Fulton County	Blanks, Tiffany C vs Publix Super Markets Inc	2008EV005709D			edit
Brown, Jean	GA State Court of Fulton County	Brown, Jean C vs Floyd Medical Center	2009EV007852D			edit
Carter, Earl	GA State Court of Fulton County	CLOSED Carter, Dominique vs Country Club of Roswell Inc	2006EV000944H			edit
	GA State Court of	Carter, Earl vs Country Club of Roswell				

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.

- ❖ Scroll through the list of information provided to manually locate client.
- ❖ Click “Edit”

Modify Client Matter Number Continued

Edit Client Matter Number

Modify your client information here

1. Enter or edit the matter number for this case

Court Name: GA State Court of Fulton County
Case Name: Adams, Rachel vs Marvin L Clark
Case Number: 12EV015172Y

Matter Number:

2. Enter or edit the client number for this client

Client Name: GA State Court of Fulton County

Client Number:

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.

- ❖ Enter your new information in the “Matter Number” and “Client Number” fields.
- ❖ 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.
- ❖ 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 Ellis, Perry D PC 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://

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❖ The **My Organization** link allows Organization Administrator to edit the organization information, update the primary contact, choose invoice options, enter a billing contact, create mandatory billing references, and enable notes.

❖ To edit the **organization contact information**:

- Type the new information in the blank fields.
- Use the drop down menus to select Country and State.
- 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:

- ❖ 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

Ellis, Perry D PC's preferred method of receiving invoices from File & ServeXpress:

Electronic Invoices only

Sends Electronic Invoice via email.

Email:

Paper Invoices

(Mailed to the physical address above via US Mail. An additional \$10.00 fee will apply.)

- ❖ 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 Ellis, Perry D PC 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:

- ❖ 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.

Mandatory Billing Reference

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

Select when users within Ellis, Perry D PC 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

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

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)

Save

❖ To enable or disable **notes for custom document list, case notes, or document notes:**

- Use the series of checkboxes to select/deselect the notes to be enabled/disabled.
- Click the “Save” button to ensure that your changes are updated in the system