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USER GUIDE
Firm Administrator

What's Inside

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FILE & SERVE CALIFORNIA RESOURCES

File & Serve California

File & Serve *California* (FSCA) has many resources available to you in order to address your questions and concerns:

- **FSCA 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. They are available 24/7/365.

- The **FSCA** website (www.fileandservecalifornia.com) contains helpful information for using the FSCA system. The website houses our training registration information, user guides, pricing, and more.

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FSCA FIRM ADMINISTRATOR OVERVIEW

This FSCA User Guide provides a convenient source of information to help you efficiently make updates to your account as a firm administrator.

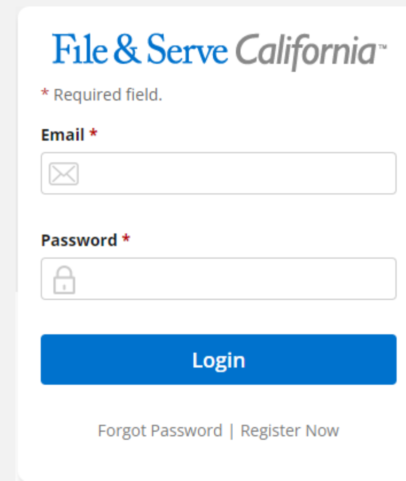
Before You Begin

1. Refer to the appropriate court rules on electronic filing prior to using FSCA to ensure that you are in compliance with local requirements.

2. Check our minimum system requirements for using FSCA.

3. If you need assistance, call our Client Support line at 1-888-247-2051. They are available to assist 24/7/365.

Logging in to FSCA



1. Before using FSCA, you must have an ID and Password. If you do not have these, click the *Register Now* link on the Login page.

2. Open your internet browser and go to www.fileandservecalifornia.com to access the login page.

3. Enter your ID and password and click **Login**.

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HOW TO ADD, UPDATE, OR REMOVE FIRM ATTORNEYS

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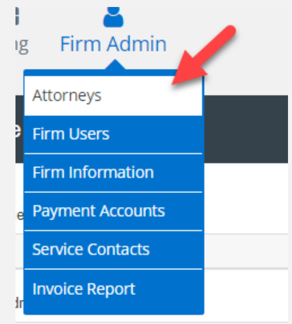
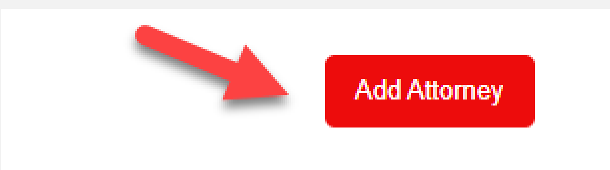
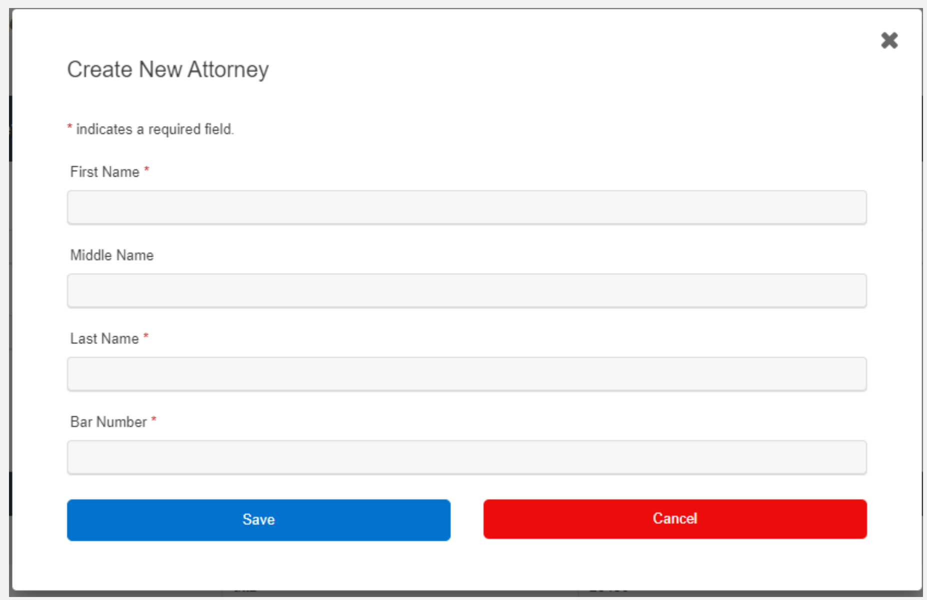
To add an *Attorney*, follow these steps:

1. Click on *Attorneys* on the drop-down menu.
2. Click on *Add Attorney*.
3. Enter the First Name, Last Name, and Bar Number. Click *Save*.







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HOW TO ADD, UPDATE, OR REMOVE FIRM ATTORNEYS (*continued*)

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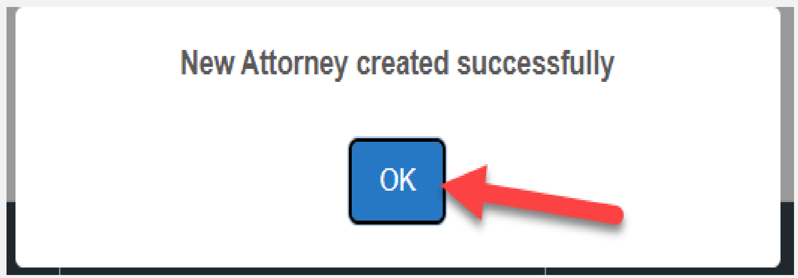
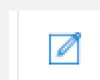
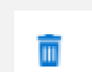
4. The attorney is now added to the firm account. Click "Ok" under *New Attorney created successfully*.



5. You can *update/edit* as needed  or *remove*  the attorney from the Firm account under the *Actions* column. Please see screenshots on the next two slides.

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HOW TO ADD, UPDATE, OR REMOVE FIRM ATTORNEYS (*continued*)

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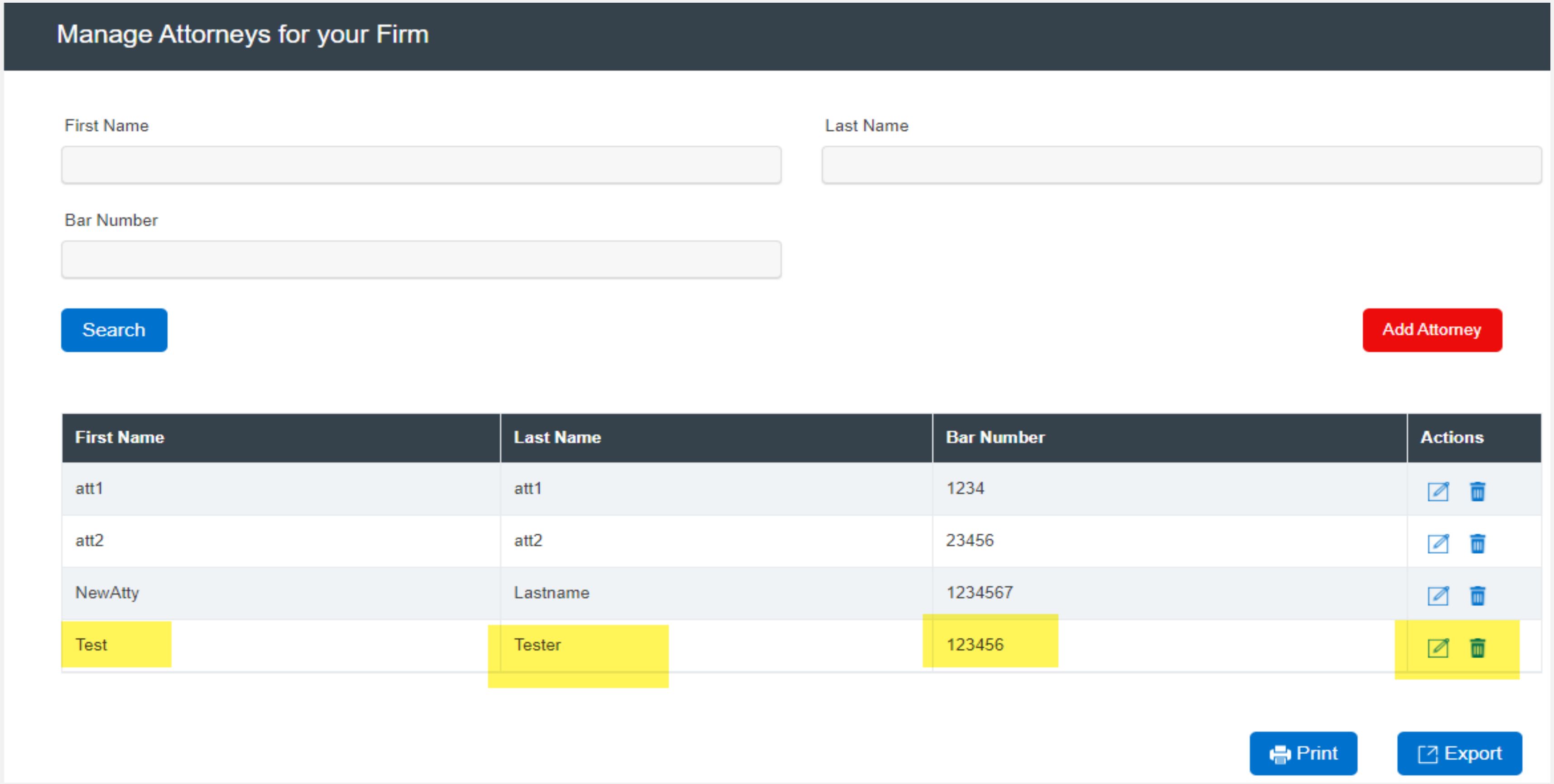

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HOW TO ADD, UPDATE, OR REMOVE FIRM ATTORNEYS (*continued*)

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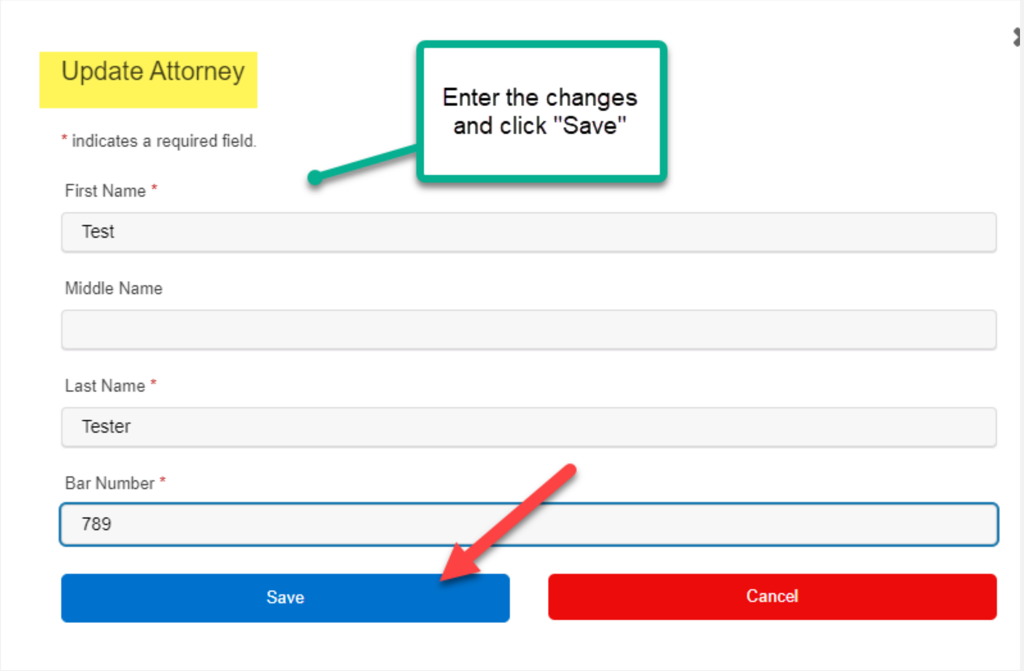

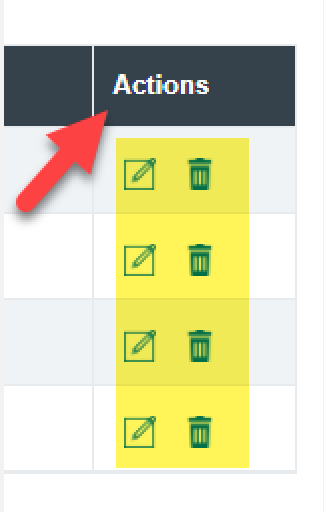

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HOW TO ADD, UPDATE, OR REMOVE A FIRM USER

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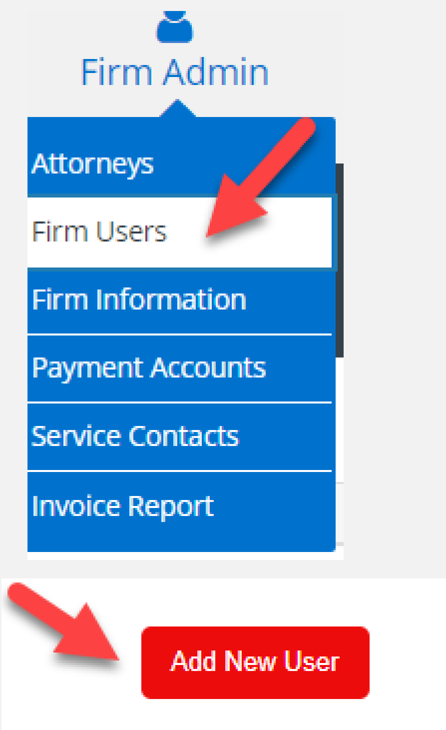
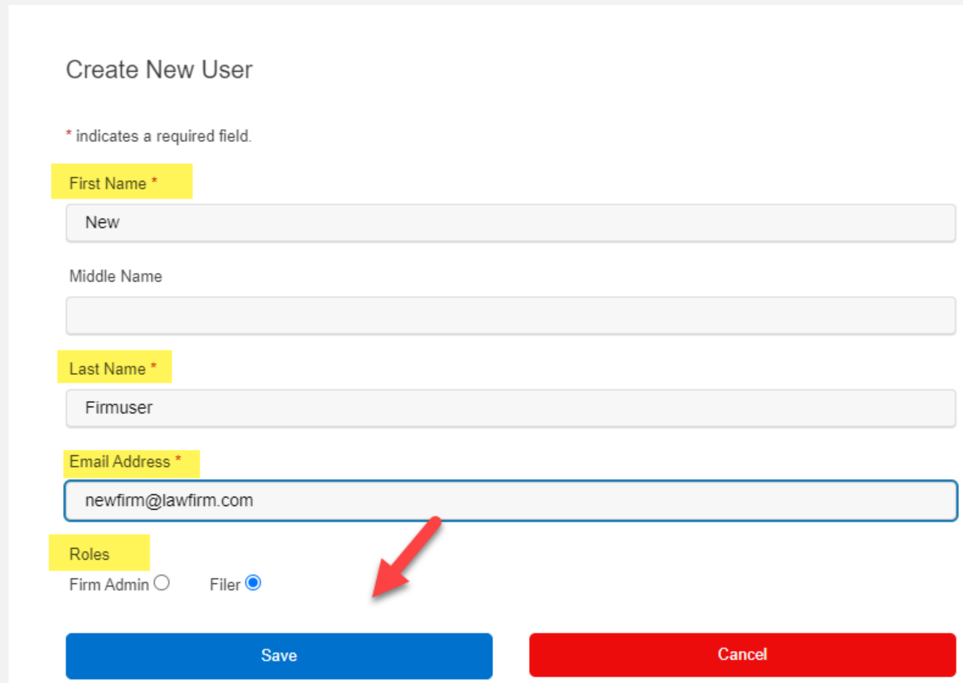
To *Add a Firm User*, follow these steps:

1. Click on *Firm Users* on your drop-down menu. This will bring you the *Manage Users For Your Firm* screen. Click on *Add New User*. Enter the First and Last Name, email address, and their *Roles*.

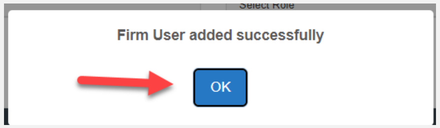




HOW TO ADD, UPDATE, OR REMOVE A FIRM USER (*continued*)

2. The role of *Firm Admin* allows User(s) to change information for firm accounts. The *Filer* allows User(s) to use the solution in its entirety except to make changes to the firm account and firm user accounts.

3. *Firm User* will be added successfully; click *Ok*.



4. The *Status* will be "Unverified" until they click "Activate Account" in the email (sent to the email address used to register) sent by the eFiling Manager (EFM). If the email doesn't go through or they accidentally delete it, the Firm Admin can select *Resend Verification*.

First Name	Last Name	Email Address	Role	Status	Action	Resend Verification or Reset Password
Admin	Ca	qaefsp+CAAdmin@gmail.com	Filer,Firm Admin	Active		
New	Firmuser	newfirm@lawfirm.com	Filer	Unverified		Resend Verification
Newer	Firmusers	firmnew@lawfirm.com	Filer	Unverified		Resend Verification

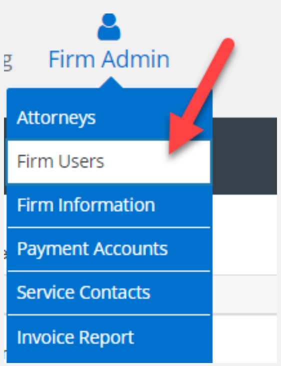
HOW TO ADD, UPDATE, OR REMOVE A FIRM USER (*continued*)

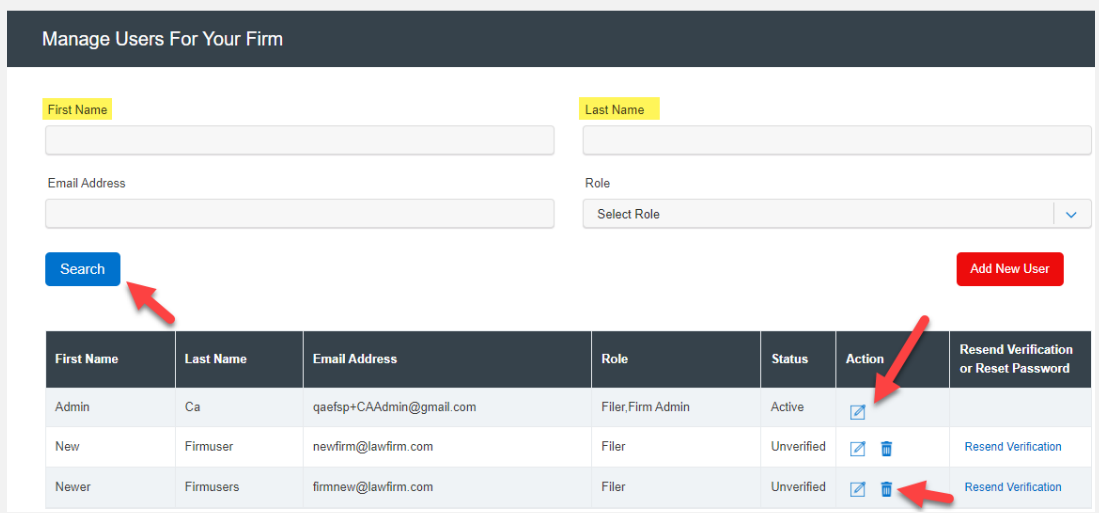
5. To *Update* a Firm User, click on *Firm Users* in the drop-down menu.

6. *Manage Users For Your Firm* will populate. Enter the Firm User's First Name, Last Name, and click *Search*.

7. Select the *edit* icon to update any changes. Please refer to screenshot below.

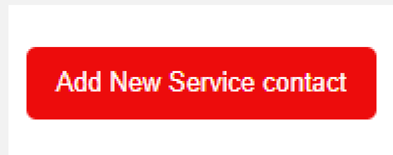
8. To *Remove* a Firm User, simply follow steps 5-6 and select the *Remove* icon. Please refer to screenshot below.





HOW TO ADD, EDIT, OR REMOVE A FIRM SERVICE CONTACT

1. Select *Service Contacts* from the Firm Admin drop-down menu, then select *Add New Service Contact.*



2. Enter the First and Last Name, email address, and select whether you want to make the Service Contact *Public.*
3. If you'd like to send a copy of any eService that is intended for the Service Contact, enter the email address in the *Administrative Copy* field. Please see screenshot on the next page.

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HOW TO ADD, EDIT, OR REMOVE A FIRM SERVICE CONTACT (*continued*)

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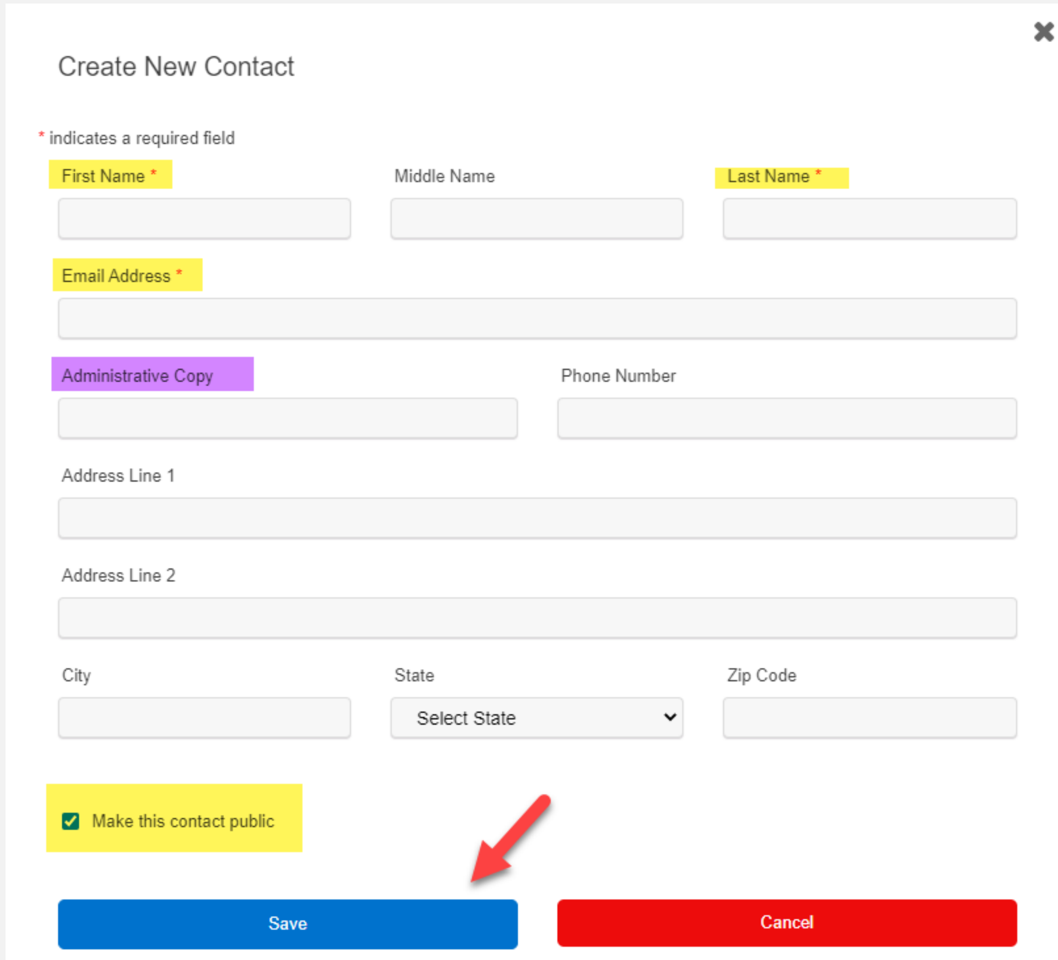

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HOW TO ADD, EDIT, OR REMOVE A FIRM SERVICE CONTACT (*continued*)

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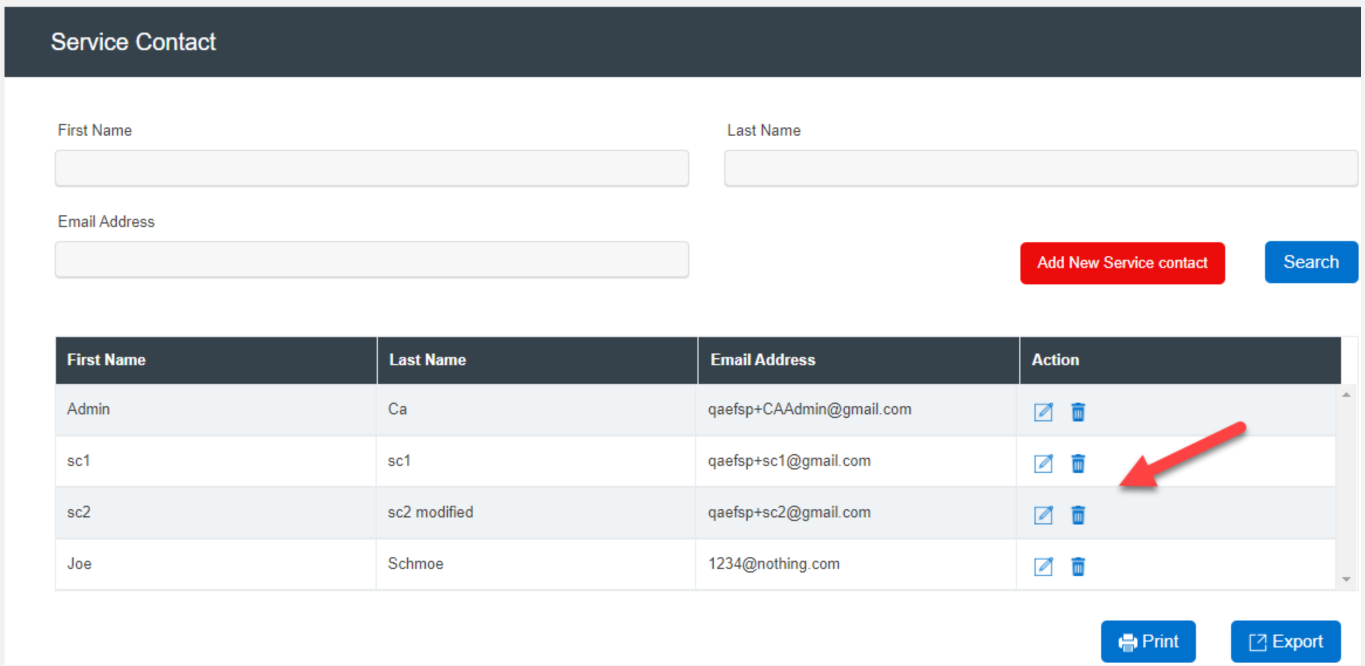
4. To *Edit or Remove* a Service Contact, select *Service Contacts* from the Firm Admin drop-down menu, then select either the *Edit* or *Remove* icon next to the desired Service Contact.



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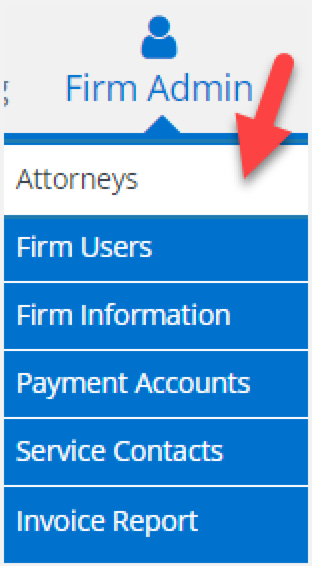
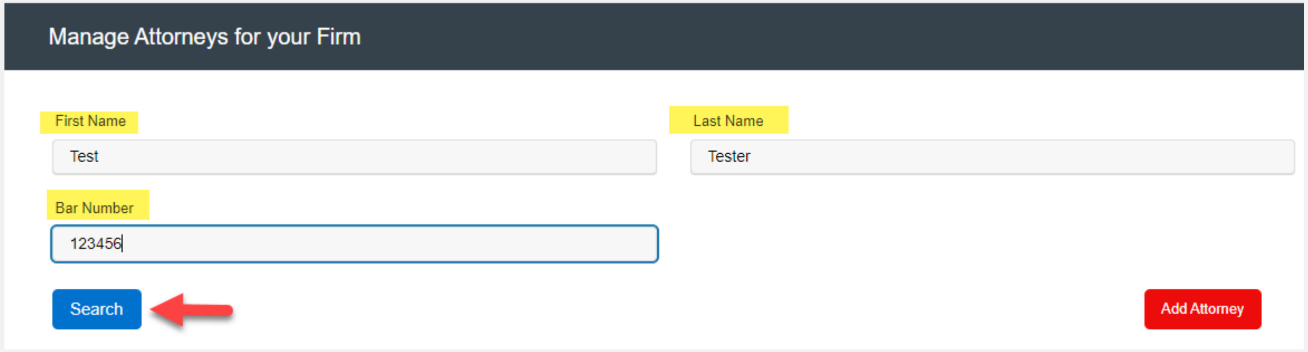
HOW TO SEARCH FOR FIRM ATTORNEYS, FIRM USERS, OR SERVICE CONTACTS

To *Search for an Attorney, Firm User, or Service Contact*, follow these steps:

1. Click on *Attorneys* in the Firm Admin drop-down menu. Enter the First Name, Last Name, and/or Bar Number and click *Search*.





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HOW TO SEARCH FOR FIRM ATTORNEYS, FIRM USERS, OR SERVICE CONTACTS (*continued*)

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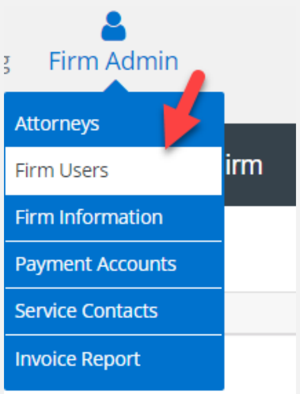
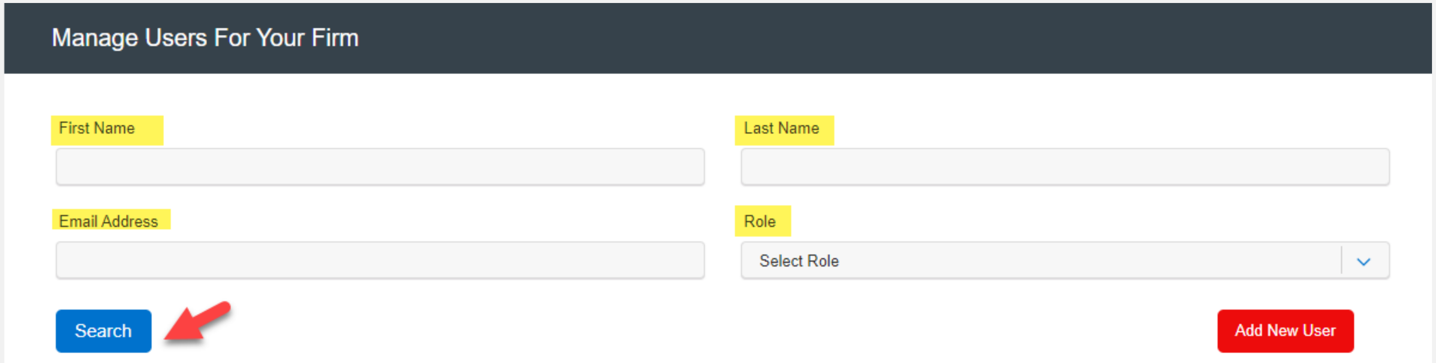
2. Click on *Firm Users* in the Firm Admin drop-down menu. Enter the First Name, Last Name, email address, and/or Role and click *Search*.





HOW TO SEARCH FOR FIRM ATTORNEYS, FIRM USERS, OR SERVICE CONTACTS (*continued*)

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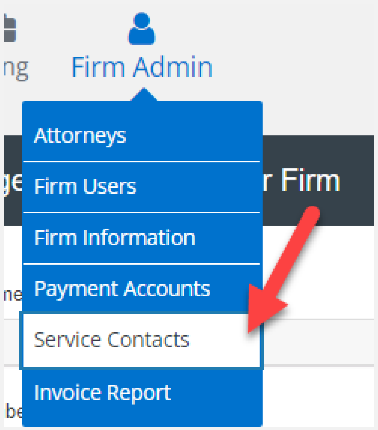
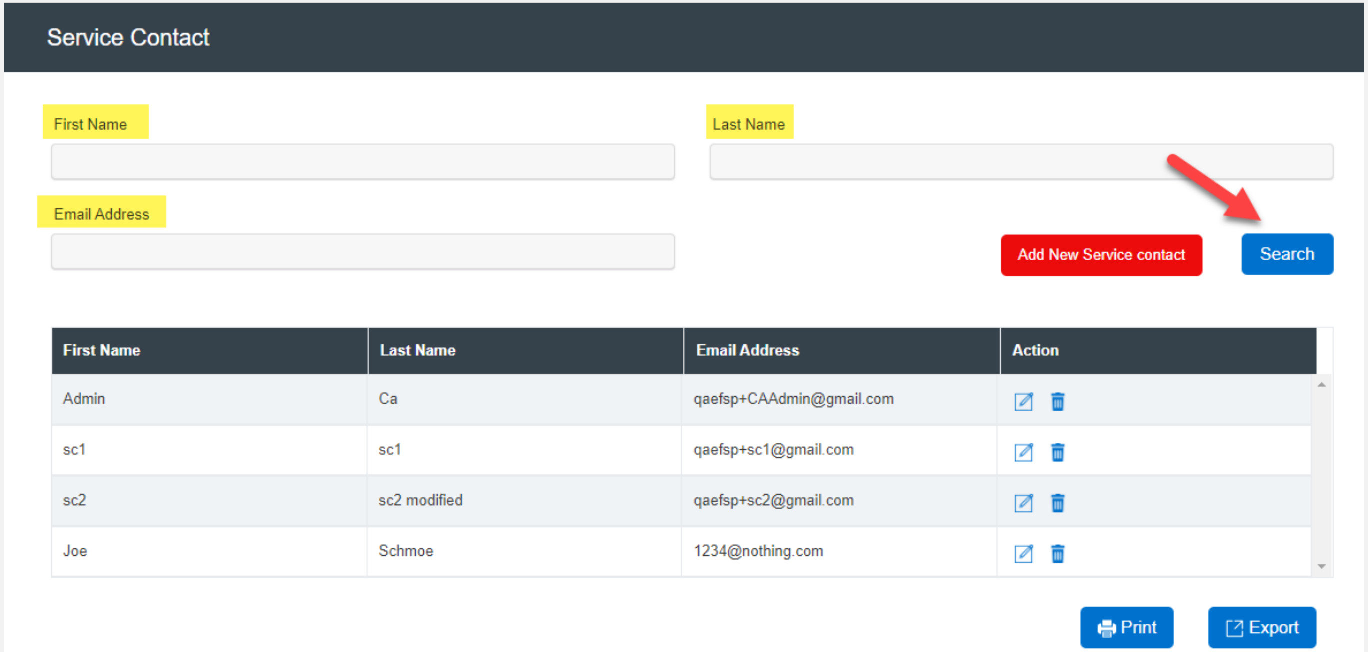
3. Click on *Service Contacts* in the Firm Admin drop-down menu. Enter the First Name, Last Name, and/or email address, and click *Search.*

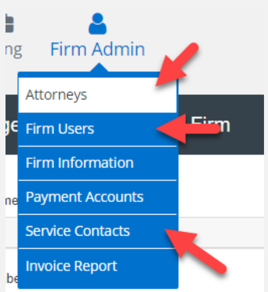


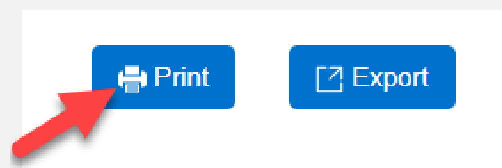


HOW TO PRINT/EXPORT A FIRM ATTORNEY, FIRM USER, OR SERVICE CONTACT LIST

To *Print/Export an Attorney, Firm User, or Service Contact List*, follow these steps:

1. To *Print* a list, select the desired category under the Firm Admin drop-down menu.
2. Select *Print*. The list will populate to print from your designated printer.





3. To *Export*, select the desired category under the Firm Admin drop-down menu.
4. Select *Export*.

An Excel spreadsheet/file will populate for you to open, save, manipulate the data as needed. Please refer to the screenshots on the next slide.

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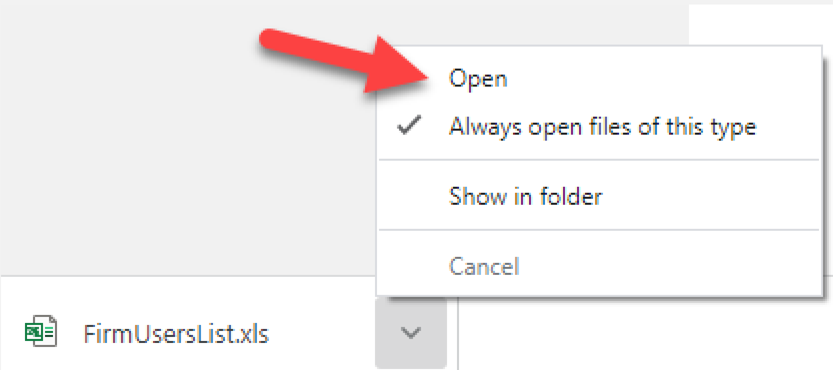
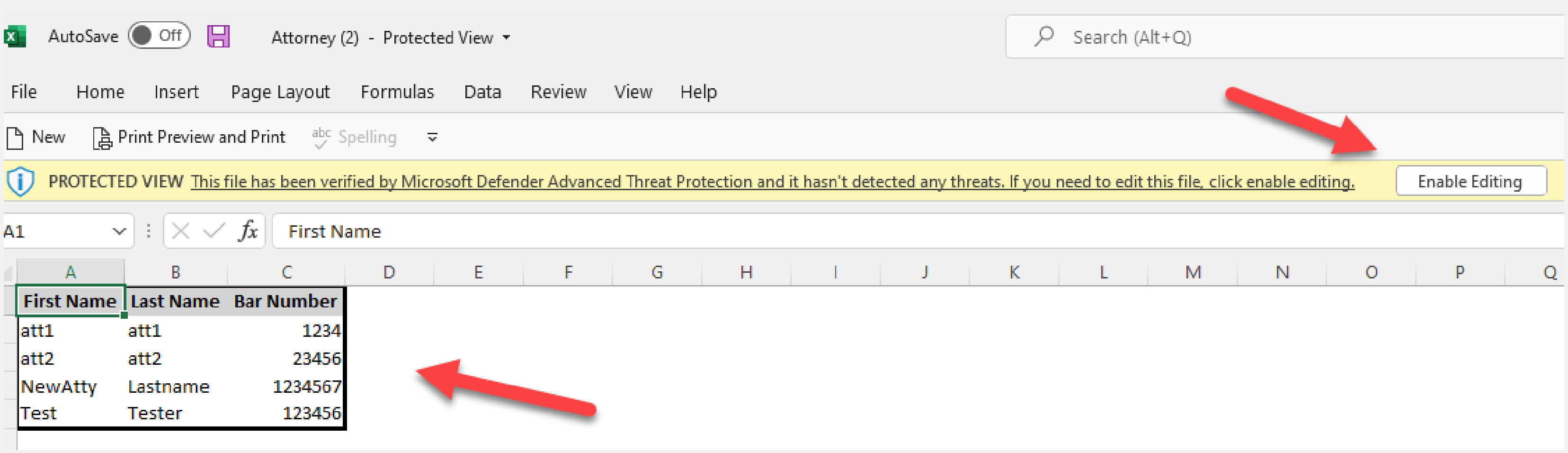
HOW TO PRINT/EXPORT A FIRM ATTORNEY, FIRM USER, OR SERVICE CONTACT LIST (*continued)*





HOW TO UDPATE FIRM INFORMATION

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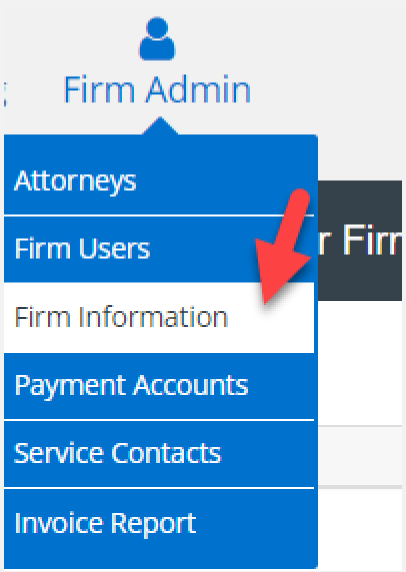
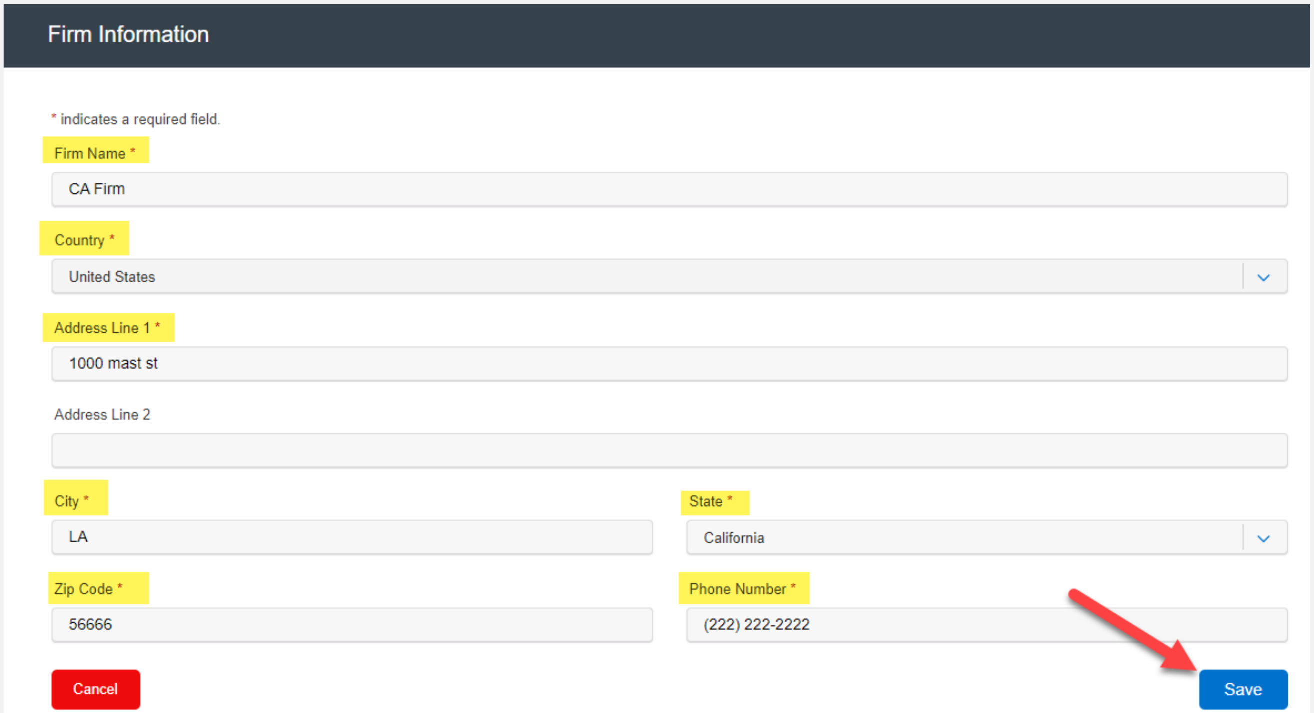
To *Update Firm Information*, follow these steps:

1. Select *Firm Information* from the Firm Admin drop-down menu.
2. Enter any information that needs to be changed/updated and click *Save.*





HOW TO ADD/UDPATE PAYMENT ACCOUNTS

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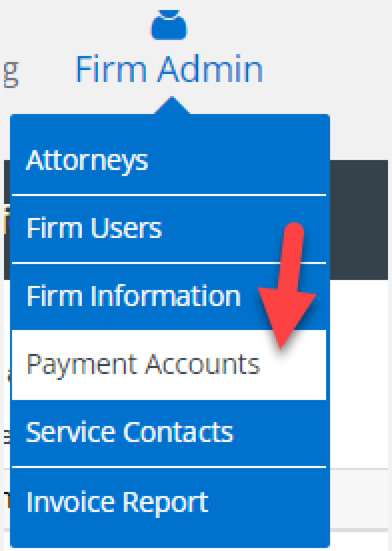
To *Add/Update Payment Accounts*, follow these steps:

1. Select *Payment Accounts* from the Firm Admin drop-down menu.
2. Select +*Add Account* to add a new Payment Account.



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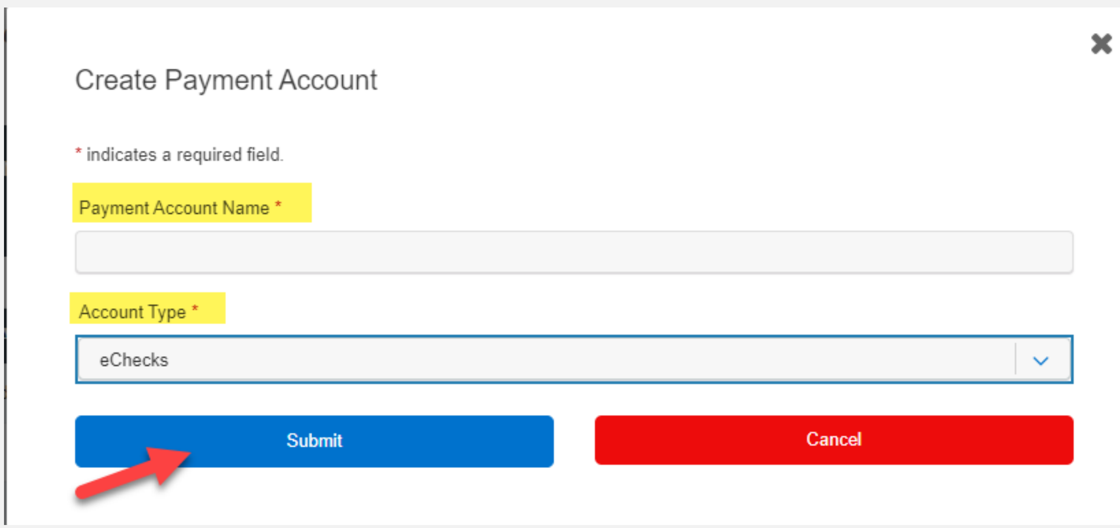
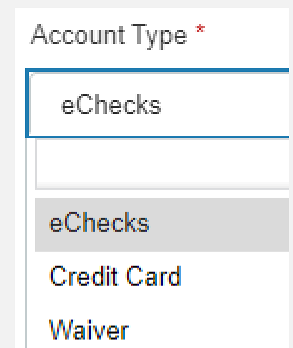
HOW TO ADD/UDPATE PAYMENT ACCOUNTS (*continued*)

3. Select an account name, e.g., Law Firm eFiling Account.
4. Select an Account Type: eChecks, Credit Card, or Waiver.
5. Click, *Submit*.





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HOW TO ADD/UDPATE PAYMENT ACCOUNTS (*continued*)

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6. To *Update* a Payment Account, select Payment Accounts from the Firm Admin drop-down menu.
7. Select the Payment Account to be updated. *Edit* or *Remove* under the Action column.

Default	Payment Account Name	Payment Account Type	Actions
●	Mastercard Account2	Credit Card	
○	waiver	Waiver	
○	MC	Credit Card	

Select which account to update

Click to Edit or Remove the Payment Account

HOW TO CREATE A MONTHLY INVOICE REPORT

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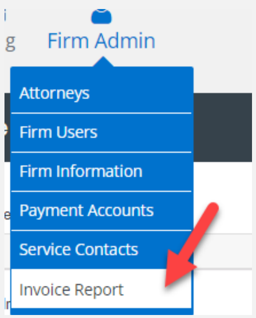
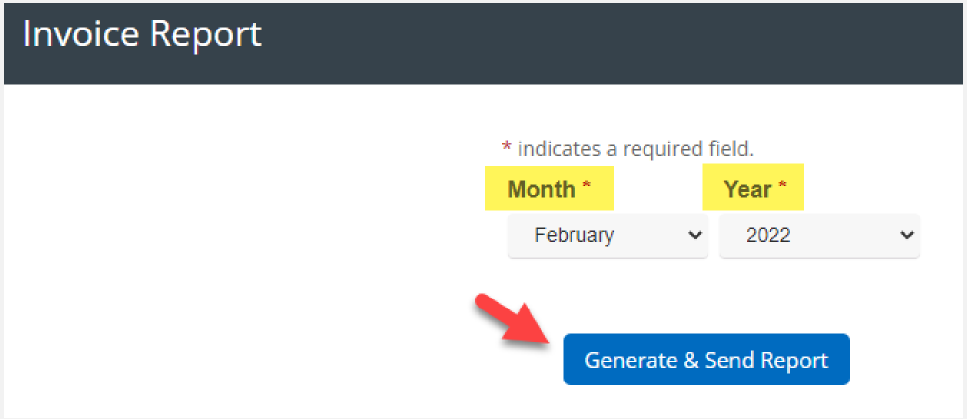
1. Select *Invoice Report* from the Firm Admin drop-down menu.



2. Select the *Month* and *Year*, then *Generate & Send Report*. The Excel report will be sent to the Firm Admin email address registered with FSCA.



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