



File & Serve California™

USER GUIDE

Firm Administrator

What's Inside

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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.

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

File & Serve California™

* Required field.

Email *

Password *

Login

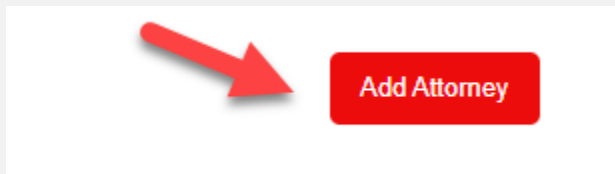
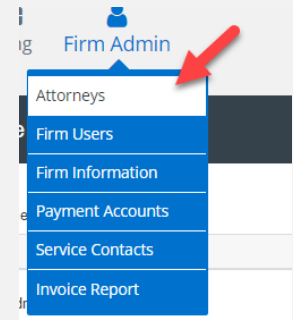
Forgot Password | Register Now

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.fileandserveocalifornia.com to access the login page.
3. Enter your ID and password and click **Login**.

HOW TO ADD, UPDATE, OR REMOVE FIRM ATTORNEYS

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*.



Create New Attorney

* indicates a required field.

First Name *

Middle Name

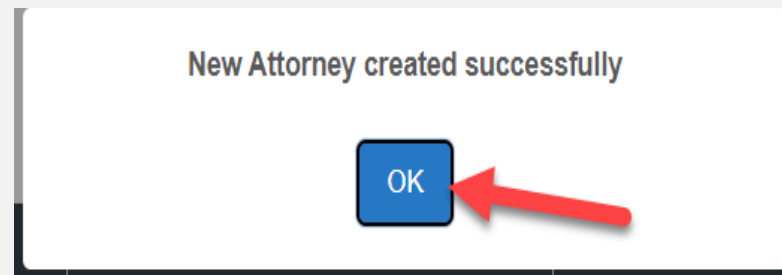
Last Name *



Bar Number *

Save Cancel

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

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.

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

Manage Attorneys for your Firm









First Name

Last Name


Bar Number

Search

Add Attorney

First Name	Last Name	Bar Number	Actions
att1	att1	1234	 
att2	att2	23456	 
NewAtty	Lastname	1234567	 
Test	Tester	123456	 

 Print

 Export

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

Update Attorney

* indicates a required field.

First Name *
Test

Middle Name

Last Name *
Tester

Bar Number *
789

Save **Cancel**

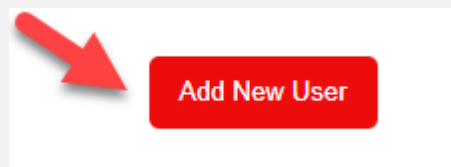
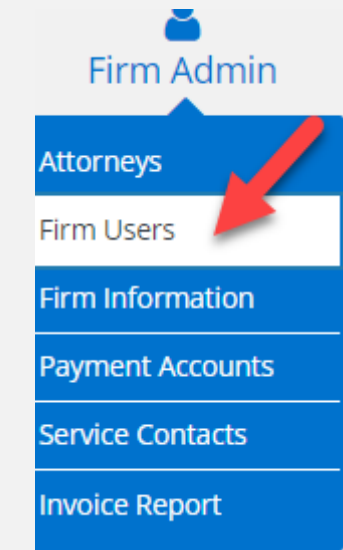
Enter the changes and click "Save"

	Actions

HOW TO ADD, UPDATE, OR REMOVE A FIRM USER

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*.

A screenshot of the 'Create New User' form. The form has the following fields and options:

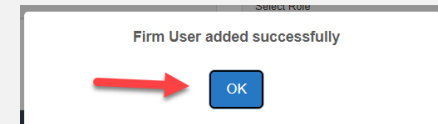
- First Name ***: A text input field containing 'New'.
- Middle Name**: An empty text input field.
- Last Name ***: A text input field containing 'Firmuser'.
- Email Address ***: A text input field containing 'newfirm@lawfirm.com'.
- Roles**: Two radio button options: 'Firm Admin' (unselected) and 'Filer' (selected).
- Buttons**: A blue 'Save' button and a red 'Cancel' button.

Red arrows point to the 'Firm Users' dropdown menu and the 'Filer' radio button.


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*.

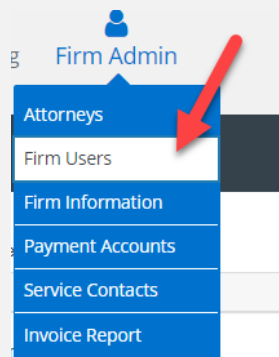


4. The *Status* will be "Unverified" until they click "Activate Account" in the email (sent to the email address used to register) sent by the eFiling Manager (EFM). If the email doesn't go through or they accidentally delete it, the Firm Admin can select *Resend Verification*.

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.

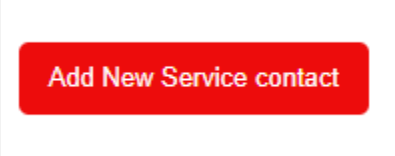


A screenshot of the 'Manage Users For Your Firm' page. It features search fields for First Name, Last Name, Email Address, and Role, along with a Search button and an Add New User button. Below is a table of users with columns for First Name, Last Name, Email Address, Role, Status, Action, and Resend Verification or Reset Password. Red arrows point to the Search button, the edit icon in the Action column, and the trash icon in the Action column.

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, EDIT, OR REMOVE A FIRM SERVICE CONTACT

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



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.

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

Create New Contact ✕

* indicates a required field

First Name * Middle Name **Last Name ***

Email Address *


Administrative Copy Phone Number

Address Line 1

Address Line 2

City State Zip Code

Make this contact public



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

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.

Service Contact

First Name Last Name

Email Address

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

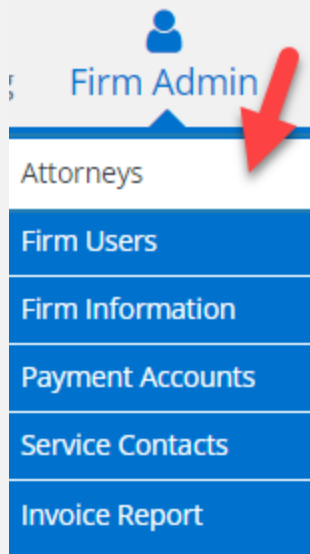
First Name	Last Name	Email Address	Action
Admin	Ca	qaefsp+CAAdmin@gmail.com	✎ 🗑
sc1	sc1	qaefsp+sc1@gmail.com	✎ 🗑
sc2	sc2 modified	qaefsp+sc2@gmail.com	✎ 🗑
Joe	Schmoe	1234@nothing.com	✎ 🗑

[Print](#) [Export](#)

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

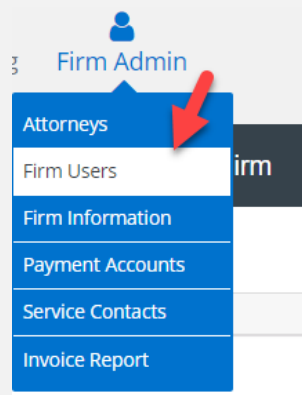
To Search for an Attorney, Firm User, or Service Contact, follow these steps:

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

A screenshot of a search form titled "Manage Attorneys for your Firm". The form has a dark grey header. Below the header, there are three input fields: "First Name" with the value "Test", "Last Name" with the value "Tester", and "Bar Number" with the value "123456". A blue "Search" button is located at the bottom left, and a red "Add Attorney" button is at the bottom right. A red arrow points to the "Search" button.

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

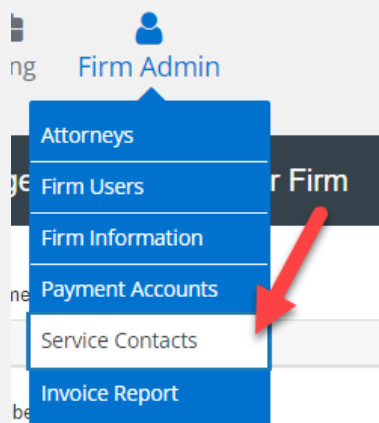
2. Click on *Firm Users* in the Firm Admin drop-down menu. Enter the First Name, Last Name, email address, and/or Role and click *Search*.



A screenshot of the 'Manage Users For Your Firm' search form. The form has a dark grey header with the text 'Manage Users For Your Firm'. Below the header, there are four input fields: 'First Name', 'Last Name', 'Email Address', and 'Role'. The 'Role' field is a dropdown menu with 'Select Role' and a downward arrow. A blue 'Search' button is at the bottom left, and a red 'Add New User' button is at the bottom right. A red arrow points to the 'Search' button.

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

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*.



Service Contact

First Name

Last Name

Email Address

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

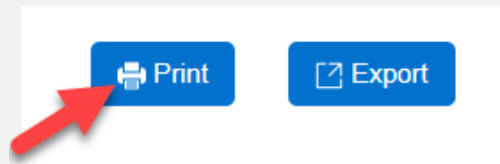
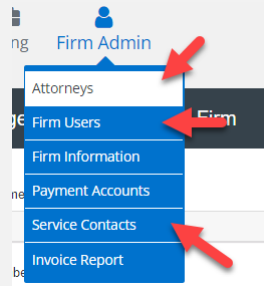
First Name	Last Name	Email Address	Action
Admin	Ca	qaefsp+CAAdmin@gmail.com	✓ 🗑
sc1	sc1	qaefsp+sc1@gmail.com	✓ 🗑
sc2	sc2 modified	qaefsp+sc2@gmail.com	✓ 🗑
Joe	Schmoe	1234@nothing.com	✓ 🗑

[Print](#) [Export](#)

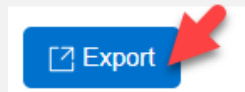
HOW TO PRINT/EXPORT A FIRM ATTORNEY, FIRM USER, OR SERVICE CONTACT LIST

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.

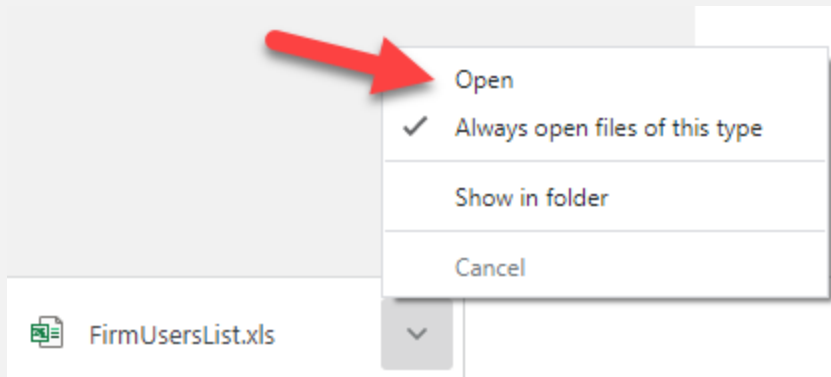


3. To *Export*, select the desired category under the Firm Admin drop-down menu.
4. Select *Export*.



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.

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



A screenshot of the Microsoft Excel interface. The title bar shows 'Attorney (2) - Protected View'. The ribbon includes 'File', 'Home', 'Insert', 'Page Layout', 'Formulas', 'Data', 'Review', 'View', and 'Help'. A search bar is visible in the top right. A yellow banner at the bottom of the ribbon area reads: 'PROTECTED VIEW This file has been verified by Microsoft Defender Advanced Threat Protection and it hasn't detected any threats. If you need to edit this file, click enable editing.' A red arrow points to the 'Enable Editing' button on the right side of this banner. The spreadsheet below shows a table with the following data:

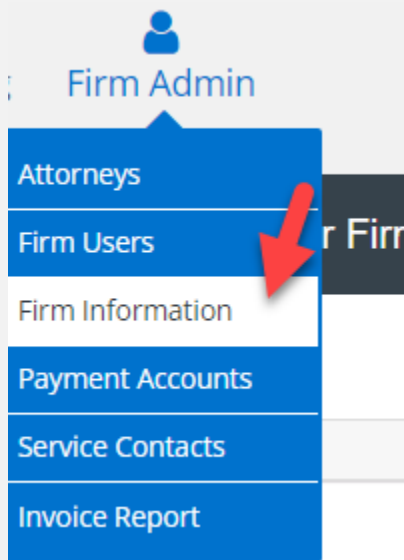
First Name	Last Name	Bar Number
att1	att1	1234
att2	att2	23456
NewAtty	Lastname	1234567
Test	Tester	123456

A red arrow points to the 'Test' row in the spreadsheet.

HOW TO UPDATE FIRM INFORMATION

To Update Firm Information, follow these steps:

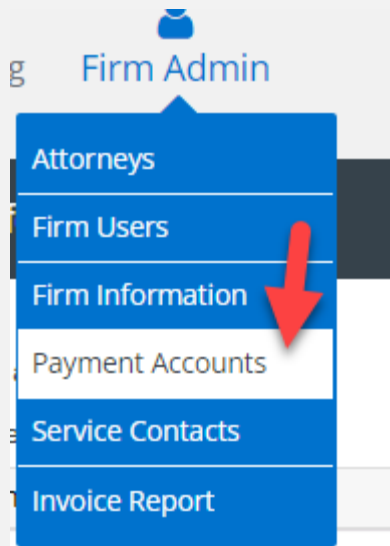
1. Select *Firm Information* from the Firm Admin drop-down menu.
2. Enter any information that needs to be changed/updated and click *Save*.

A screenshot of the 'Firm Information' form. The form has a dark header with the title 'Firm Information'. Below the header, there is a note: '* indicates a required field.' The form contains several input fields, each with a yellow highlight above it: 'Firm Name *' (text: 'CA Firm'), 'Country *' (dropdown: 'United States'), 'Address Line 1 *' (text: '1000 mast st'), 'Address Line 2' (empty), 'City *' (text: 'LA'), 'State *' (dropdown: 'California'), 'Zip Code *' (text: '56666'), and 'Phone Number *' (text: '(222) 222-2222'). At the bottom left is a red 'Cancel' button, and at the bottom right is a blue 'Save' button. A red arrow points to the 'Save' button.

HOW TO ADD/UPDATE PAYMENT ACCOUNTS

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.



HOW TO ADD/UPDATE 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*.

Create Payment Account

* indicates a required field.

Payment Account Name *

Account Type *

eChecks

Submit Cancel

Account Type *

eChecks







eChecks

Credit Card

Waiver

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

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.

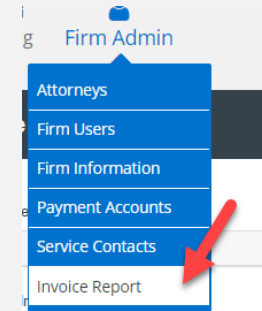
Default	Payment Account Name	Payment Account Type	Actions
<input checked="" type="radio"/>	Mastercard Account2	Credit Card	 
<input type="radio"/>	waiver	Waiver	 
<input type="radio"/>	MC	Credit Card	 

Select which account to update

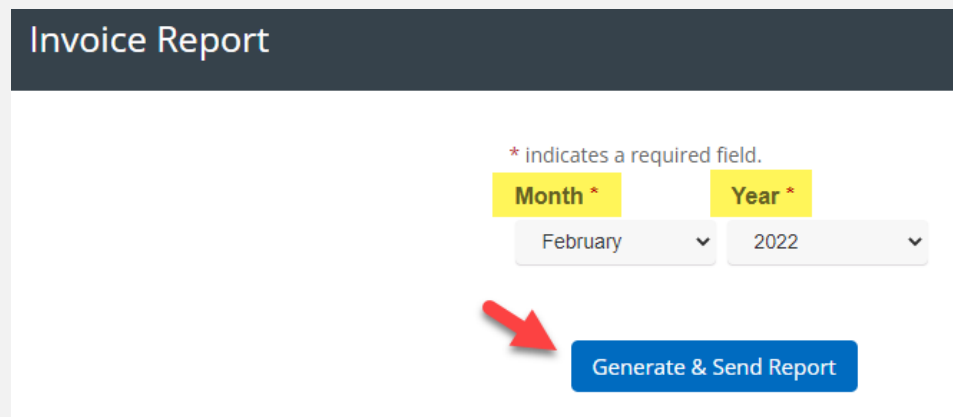
Click to Edit or Remove the Payment Account

HOW TO CREATE A MONTHLY INVOICE REPORT

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.

A screenshot of the 'Invoice Report' form. The form has a dark header with the text 'Invoice Report'. Below the header, there is a note: '* indicates a required field.' There are two dropdown menus: 'Month *' with 'February' selected, and 'Year *' with '2022' selected. A red arrow points to a blue button labeled 'Generate & Send Report' at the bottom of the form.