

File & Serve *Xpress*™

Billing Information

User Guide



Billing Information

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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** is where you can find password help, what's new and any important information like scheduled maintenance or system changes. Click [here](#) to access the login page.
- » **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.

File & ServeXpress Resources

Billing Information Link Overview

The Billing Information link gives users the ability to view past invoices, to obtain real time reports of File & ServeXpress billing activity, and to request an electronic copy of an invoice via email.

► MailBox

Inbox
Sent Items
Rejected Items
Saved Transactions

► Quick Start

Colorado ▼
CO Mock County District Court ▼
2011 CV126

[File/Serve](#) [Case Search](#) [Set Track Case](#)

► Track & Manage

Transaction ID

[GO](#)

Alerts

Tracked Items
Edit Tracked Items
Calendar

Message Boards

My Attorneys
Case View
Document Upload
Case & Party Management
Billing Information
Custom Document Lists



The instructions for using billing information can be found at the top of the Billing Information page.

Billing Information Report

Use this report to view charges your firm has incurred.

TIP: Invoice payments are due 10 days from the date of an invoice. All billing inquiries must be made within 60 days of receipt of the invoice.

Define your report: (* indicates a required field.)

1. Select a *Format*.
 - **Invoice** - displays in the same format as your monthly invoice. Search criteria are unavailable.
 - **Report**(all types) - displays in a list of transactions which you can narrow down with search criteria.
 - **Email Billing Information** - emails a comma separated data file to the email you provide. Search criteria are unavailable.
 - **Subscription Use** - displays all of your subscriptions with usage information.
2. Pick a *Month* and *Year*.
3. Optionally fill in search criteria for the **Report** format.
4. Click **View**.
5. **Note:** Billing data may not represent all recent activity, including credits for current month report.

File & ServeXpress offers many customized billing reports to assist practitioners with billing and invoicing options. Choose the current month for the most recent charges or a prior month for a complete list of charges for that month.

- ✓ **All Fees** – Pull a list of all fees incurred in a given month by your organization on File & ServeXpress.
- ✓ **Filing & Service Fees Only** – Pull a list of all File & ServeXpress Filing & Service fees for a given month.
- ✓ **Statutory Filing Fees Only** – Obtain a list of all statutory fees for a given month charged for transactions your organization has submitted into Courts.
- ✓ **Setup Fees Only** – Provides a list of all File & ServeXpress setup fees for a given month for litigations your organization is involved in.
- ✓ **Search Report Fees Only** – Obtain a list of all fees incurred for searches performed in a given month by users within your organization.

Billing Information Tips:

- ✓ **Document Purchases Only** – Provides a list of all documents purchased in a given month by users within your organization.
- ✓ **Alert Fees Only** – Pull a list of all fees associated with Alerts running in a given month by users within your organization.
- ✓ **Email Billing Information** – Receive a .CSV file of all transactions and charges incurred by your organization within a given month.

Billing Information - Invoice

File & ServeXpress invoices are sent via email or US Mail to clients during the first week of the month following the month in which charges were incurred. Invoices are also available on the File & ServeXpress system via the Billing Information link on the Home page.

1. For an Invoice, Use the drop down menu to select the format you wish to view.
2. Choose a month and year. invoices can only be viewed for previous months.
3. Click the **View** link.
4. A copy of the invoice will be generated. Use the [Printable Version](#) link to obtain a printable/downloadable version of the information on the screen.

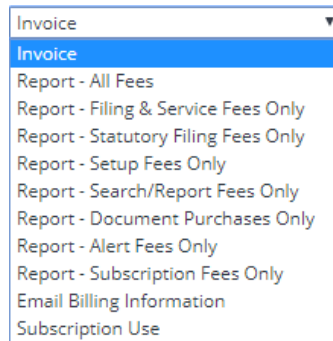
- ✓ When viewing search results, all of the table headers are sortable in order to help you organize your data.
- ✓ **Format Selections:**

The screenshot shows a dropdown menu with the following options:

- Invoice
- Invoice**
- Report - All Fees
- Report - Filing & Service Fees Only
- Report - Statutory Filing Fees Only
- Report - Setup Fees Only
- Report - Search/Report Fees Only
- Report - Document Purchases Only
- Report - Alert Fees Only
- Report - Subscription Fees Only
- Email Billing Information
- Subscription Use

Billing Information - Reports

In addition to monthly invoices, File & ServeXpress provides several reports with real-time billing data in order to assist you with your billing needs.



- Invoice
- Invoice
- Report - All Fees
- Report - Filing & Service Fees Only
- Report - Statutory Filing Fees Only
- Report - Setup Fees Only
- Report - Search/Report Fees Only
- Report - Document Purchases Only
- Report - Alert Fees Only
- Report - Subscription Fees Only
- Email Billing Information
- Subscription Use

1. To obtain up-to-date billing information 24 hours a day, choose one of the **Reports** available in the drop down menu. This will enable the **Report Search Criteria** section of the page:

Report Search Criteria:



Authorizer/Purchaser: All Users

Court Name: All Courts

Case Name: 

Case Number: 

[View](#) [Clear](#)

2. Choose a month and year and additional **Report Search Criteria** (as needed).
3. Click the [View](#) link.
4. The report will be generated. Use the [Printable Version](#) link to obtain a printable/downloadable version of the information on the screen.

Billing Information – Email Billing Information

1. To obtain billing information via email, choose **Email Billing Information** from the * *Format:* drop down menu. This will enable the **Report Search Criteria** section of the page:
2. Choose a month and year.
3. Click the **View** link. This will bring you to the following screen:

Email Billing Data for Mock Appeals Firm B-Demo
Billing Period : October, 2017

To: at

4. Enter the appropriate information and click the **Send Mail Now** button to receive the invoice sent one time.
5. To automatically be sent an invoice every month, click the **Get Monthly Invoice** button.