File & Serve Xpress™

My Organization Profile

User Guide

My Organization Profile - Organization Administrator

TABLE OF CONTENTS

File & ServeXpress

Resources

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.

Organization Administrator Overview

File & Serve Xpress

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?

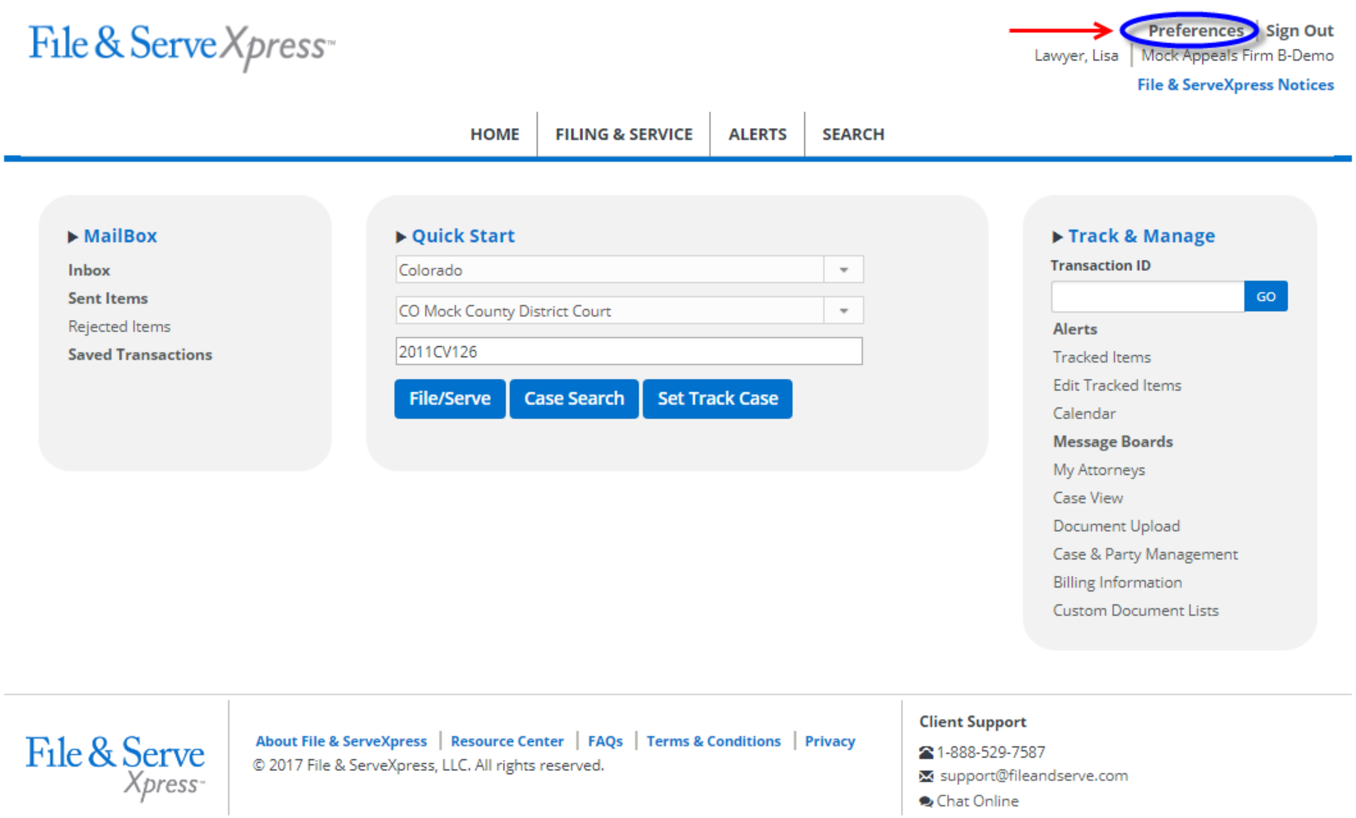
A National Organization Administrator (“NOA”) is an individual or a group of individuals who have the ability to manage users and firm profiles across multiple offices without maintaining separate File and ServeXpress user names for each office. A firm can designate more than one user as a NOA.

Tips for Organization Administrators:

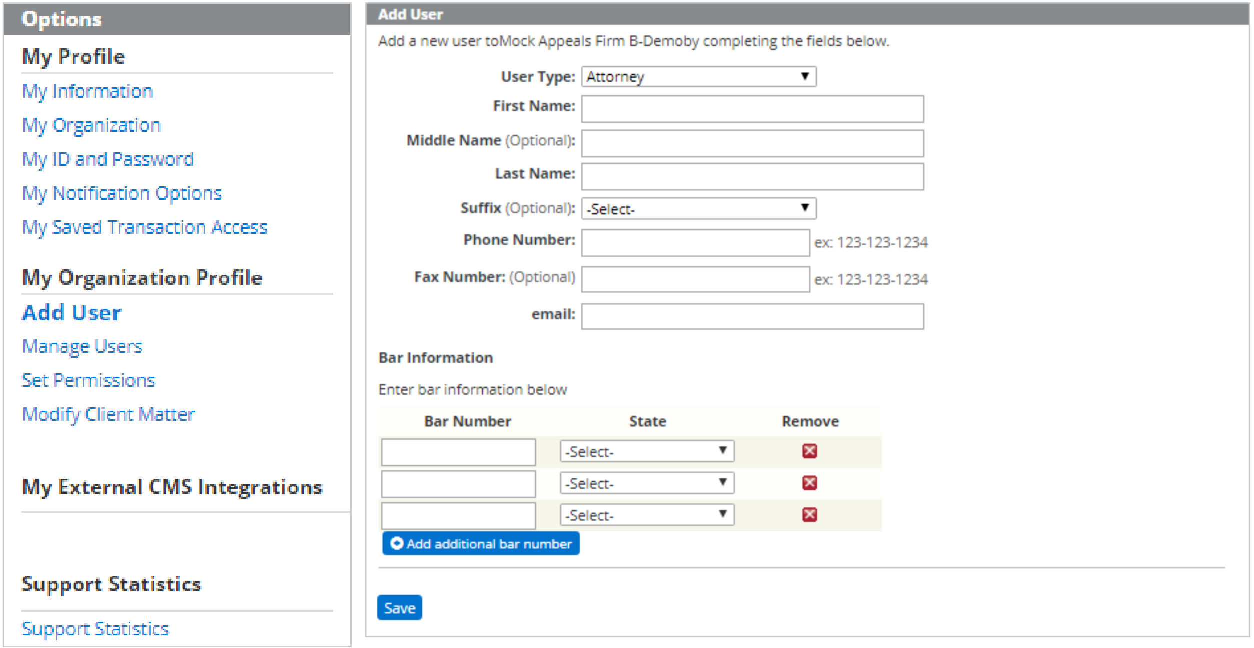
- ✓ **24/7 Access:** You can make changes to your organization’s account any time you have access to File & ServeXpress. Call our 24/7 Client Service line whenever you need our help.
- ✓ **National Organization Administrator Set up:** Call File & ServeXpress Client Service at 888-529-7587 to designate 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.

Organization Administrator Overview

To access the Organization Administrator options, click on the Preferences link at the top of the Homepage.



Add User Link



1. The **Add User** link allows OA's to create additional User ID's in their firm.
   a) Complete the open type fields and drop down menus.
   b) Click the "Save" button at the bottom of the page to submit the request.
   c) A welcome email will be sent to the new User within 48 hours with a login ID and temporary password.

2. Additional Bar Numbers/States can be added for "Attorney" Users. "Staff Member" users will not be required to add a Bar Number.

File & Serve Xpress

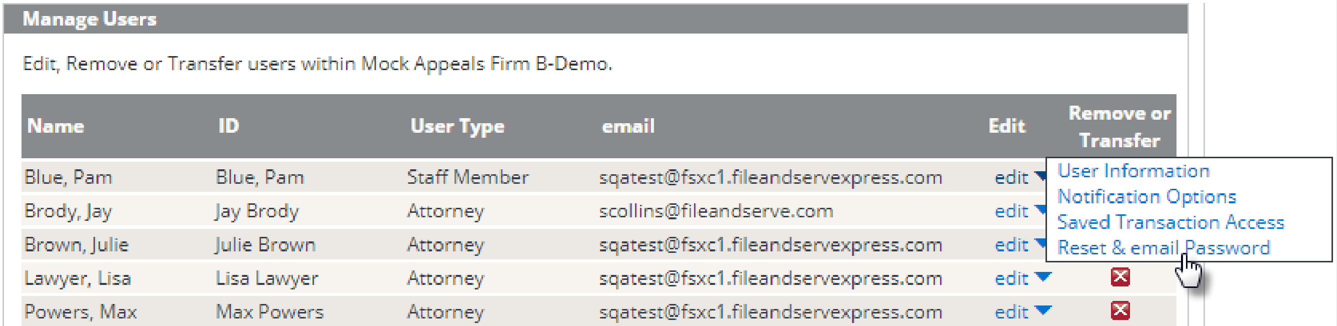
Add User Link Tips:

✓ **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

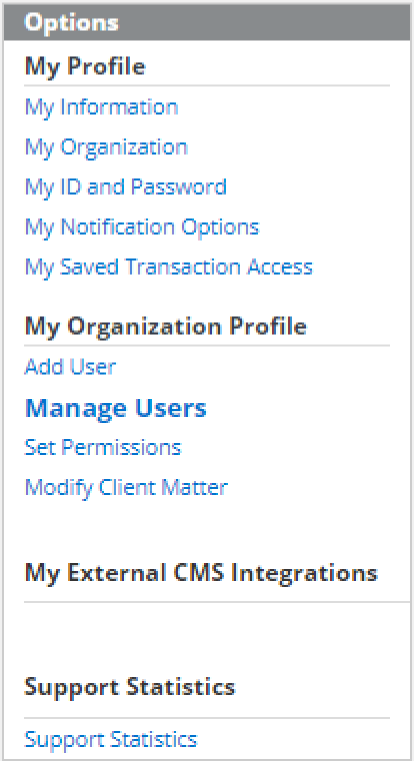
File & Serve Xpress™


Manage Users

Edit, Remove or Transfer users within Mock Appeals Firm B-Demo.

Name	ID	User Type	email	Edit	Remove or Transfer
Blue, Pam	Blue, Pam	Staff Member	sqatest@fsxc1.fileandservexpress.com	edit	
Brody, Jay	Jay Brody	Attorney	scollins@fileandserve.com	edit	
Brown, Julie	Julie Brown	Attorney	sqatest@fsxc1.fileandservexpress.com	edit	
Lawyer, Lisa	Lisa Lawyer	Attorney	sqatest@fsxc1.fileandservexpress.com	edit	
Powers, Max	Max Powers	Attorney	sqatest@fsxc1.fileandservexpress.com	edit	

1. The **Manage Users** link allows OA’s to edit, remove, or transfer any of the organization’s current users.
2. 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.
3. Click on the “Remove Or Transfer” box next to a User to:
   a) Delete a User from a firm.
   b) 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 Mock Appeals Firm B-Demo to have certain administrative rights. (See below for details)

Name	ID	email	Organization Administrator	Reset Password	Modify Organization	Remove User	Add/Modify User
Blue, Pam	Blue, Pam	sqatest@fsxc1.fileandservexpress.com	☐	☐	☐	☐	☐
Brody, Jay	Jay Brody	scollins@fileandserve.com	☐	☐	☐	☐	☐
Brown, Julie	Julie Brown	sqatest@fsxc1.fileandservexpress.com	☐	☐	☐	☐	☐
Lawyer, Lisa	Lisa Lawyer	sqatest@fsxc1.fileandservexpress.com	☑	☑	☑	☑	☑
Powers, Max	Max Powers	sqatest@fsxc1.fileandservexpress.com	☐	☐	☐	☐	☐

Save

Options

My Profile
- My Information
- My Organization
- My ID and Password
- My Notification Options
- My Saved Transaction Access

My Organization Profile
- Add User
- Manage Users
- **Set Permissions**
- Modify Client Matter

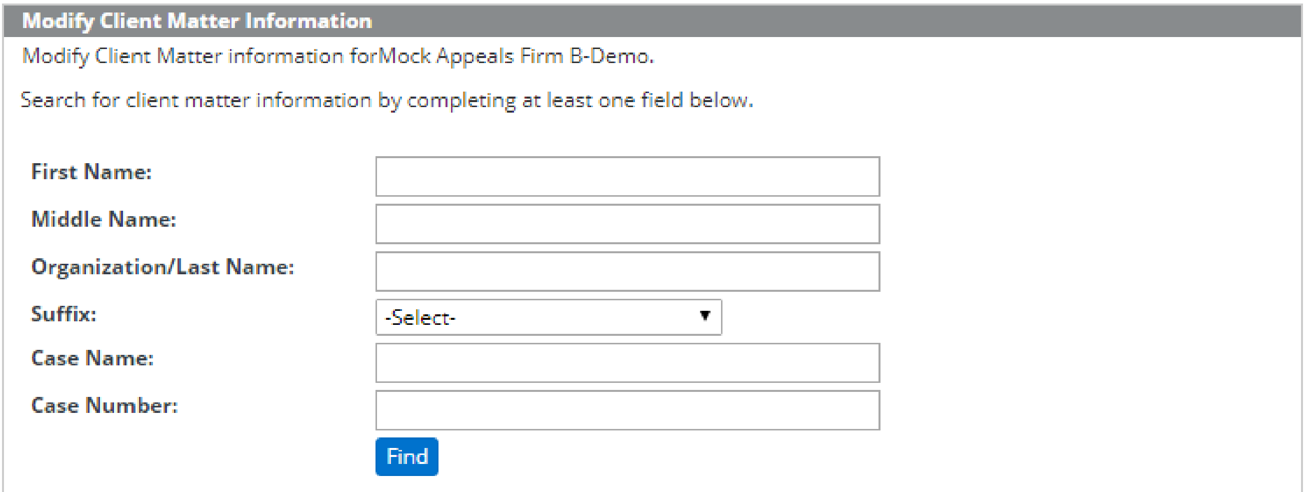
My External CMS Integrations

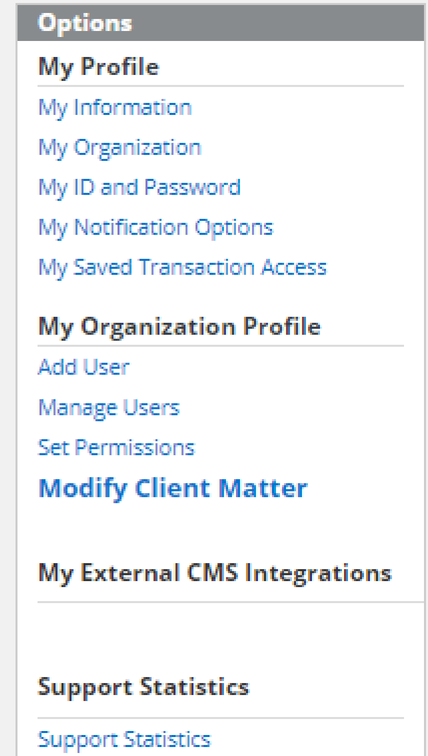
Support Statistics
- Support Statistics

1. The Set Permissions link allows OA's to share Organization Administrator rights with other firm members.

2. 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





1. The Modify Client Matter link allows OA's 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.

a) Search for client matter information by entering information in the blank fields and drop-down menu and click “Find”.
b) Scroll through the list of information provided to manually locate client.
c) Click “Edit”.

Results: 1 - 10 of 578

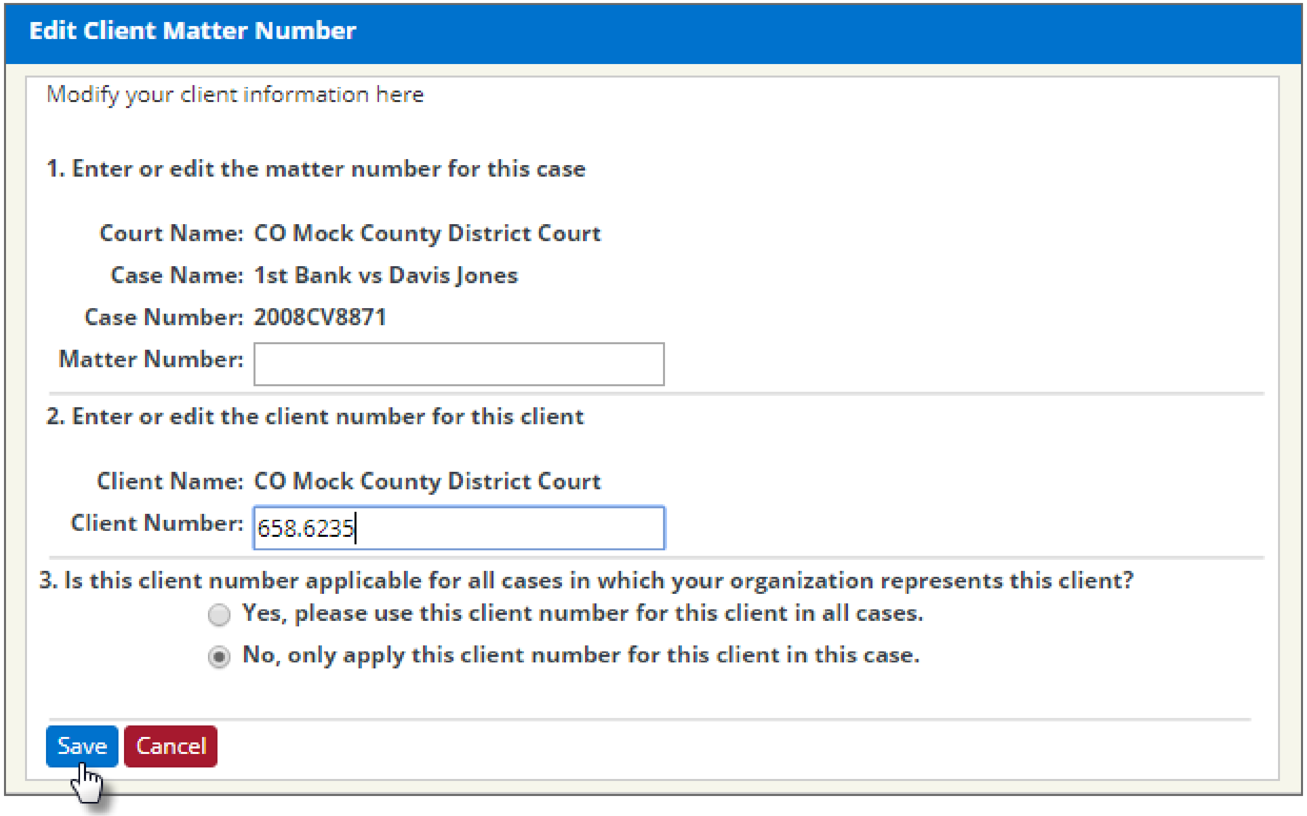
Pages: < Prev 1 2 3 4 5 6 7 8 9 10 ... Next >

Results per page: 10

Client Name ▲	Court	Case Name	Case Number	Client Number	Matter Number	Edit
1st Bank	CO Mock County District Court	1st Bank vs Davis Jones	2008CV8871			edit
A 1 Supplier	Mock Court-E-Service	Miller, Lisa et al vs Custom Mountain Homes et al	MSC12-99999			edit
A B C Coffee Co	CO Mock County District Court	John Smith v Kyle Hershberg	2010CV1221			edit
A B C Corp	Mock Court-E-Service	Doe, John vs A B C Corp	2005CV123456			edit
A I G Insurance Co	CO Mock County District Court	Ford, Steve vs AIG Insurance	2008CV200			edit

Modify Client Matter Link Tips:

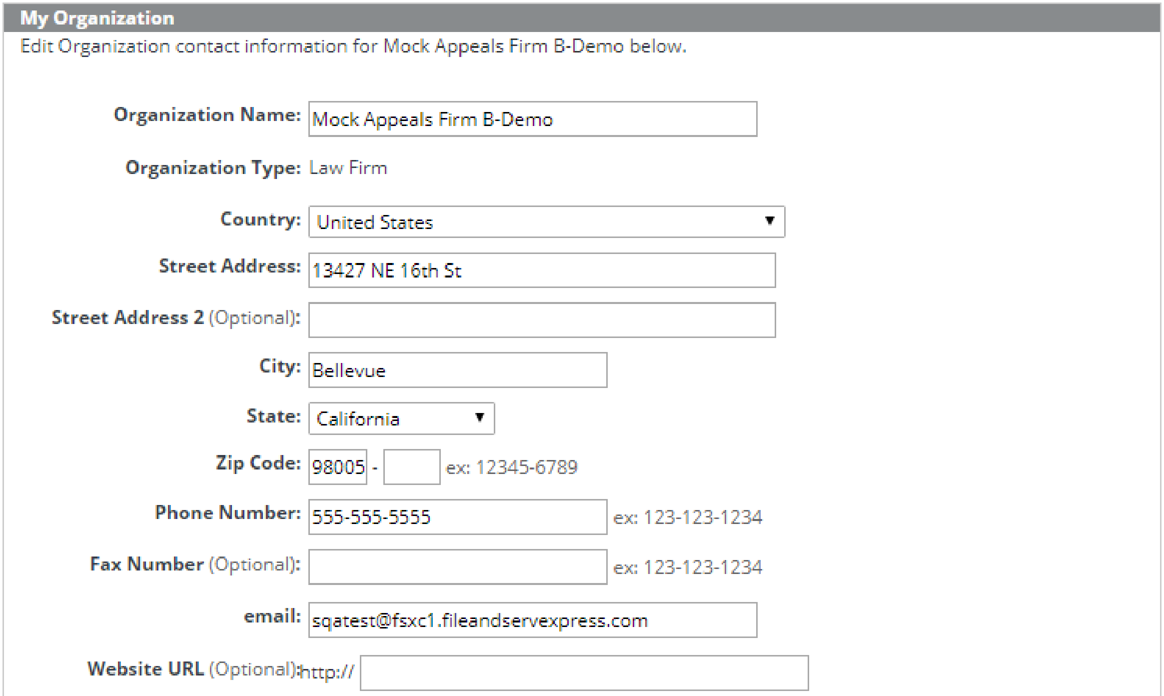
✓ **Note:** The OA can also mandate the entering of firm codes to all billable sections of the system, so that those codes appear next to all entries on the invoice. See the “My Organization” link section below for details.

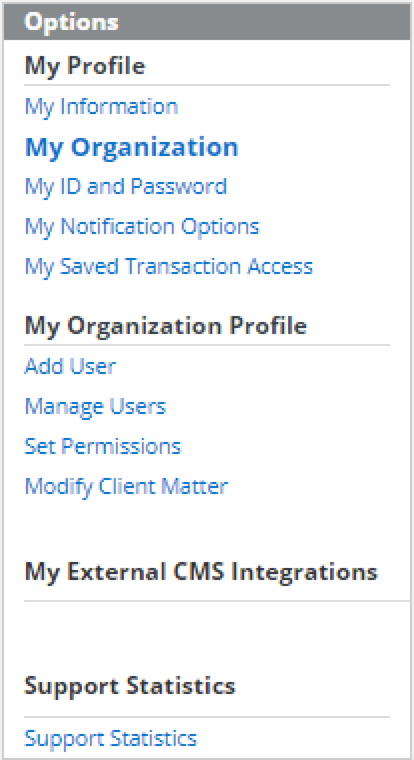


File & Serve Xpress™

d) Enter your new information in the "Matter Number" and "Client Number" fields.
e) 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.
f) Click Save to save your changes and return to the Modify Client Matter Information screen.

My Organization Link





1. The **My Organization** link allows OA's to edit the organization information, update the primary contact, choose invoice options, enter a billing contact, create mandatory billing references, and enable notes.
2. To edit the **organization contact information**:
   a) Type the new information in the blank fields.
   b) Use the drop down menus to select Country and State.
   c) 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: Jay Brody ▼

1. 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
Mock Appeals Firm B-Demo's preferred method of receiving invoices from File & ServeXpress:

◉ **Electronic Invoices only**

Sends Electronic Invoice via email.

Email: fake@fake.com

○ **Paper Invoices**

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

1. 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 Mock Appeals Firm B-Demo 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: Lisa Lawyer ▼

Options

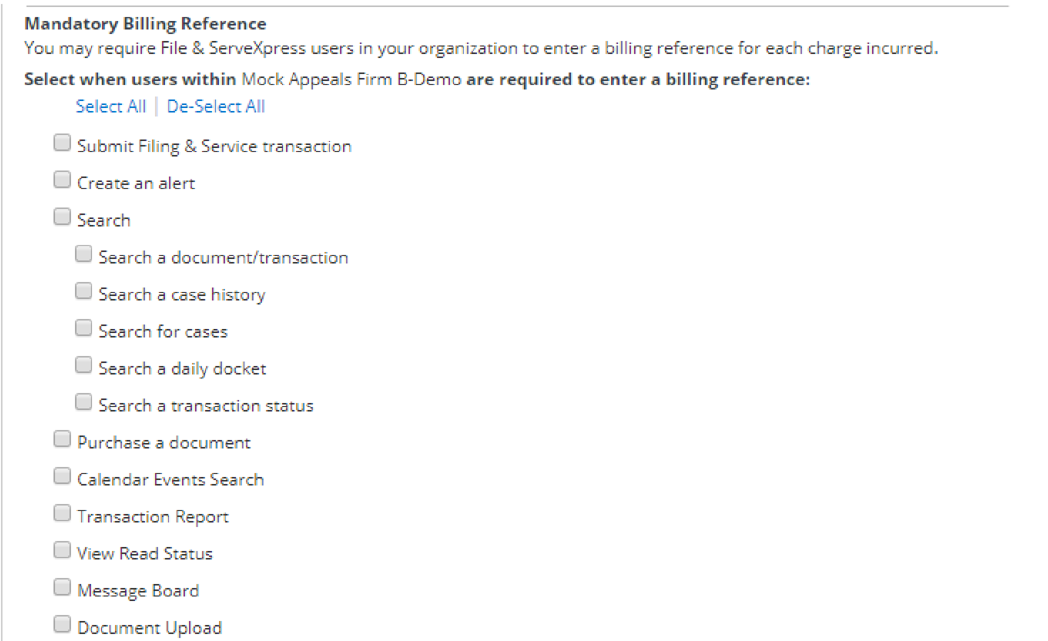
My Profile
My Information
My Organization
My ID and Password
My Notification Options
My Saved Transaction Access

My Organization Profile
Add User
Manage Users
Set Permissions
Modify Client Matter

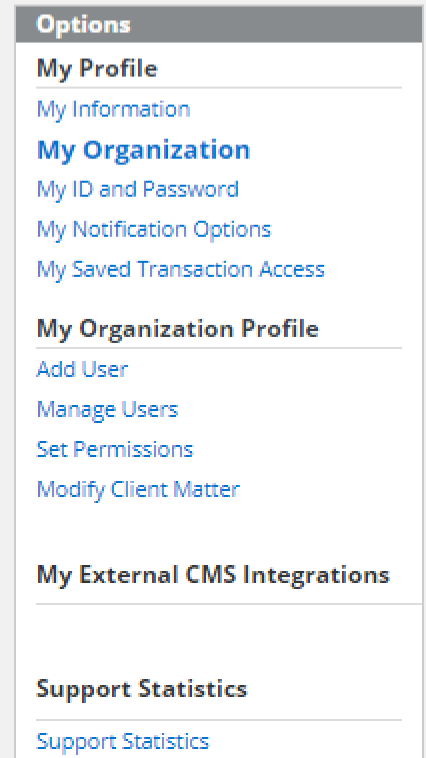
My External CMS Integrations

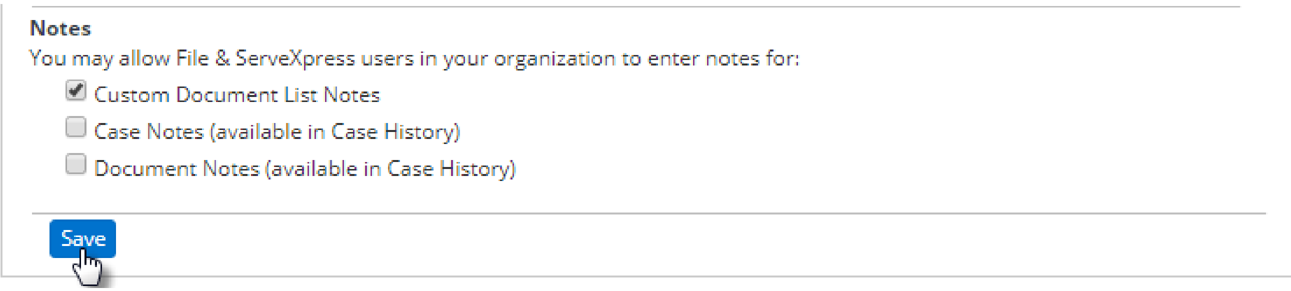
Support Statistics
Support Statistics

5. 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.



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





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

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