

File & Serve *Xpress*[™]

Message Boards

User Guide



Message Boards

TABLE OF CONTENTS

File & ServeXpress Resources	3
Message Boards Overview	4
Activating Message Boards	5
Managing Message Boards	7
Message Boards Notifications	8

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

Message Boards Overview

Any firm that is an active case participant on a File & ServeXpress case has the ability to activate a Message Board for that case. This is a premium feature that has a monthly flat rate charge per message board, regardless of how many messages are posted. This feature gives users one application in which they cannot only e-file/e-serve, but can also communicate with the other participants in the case without having to worry about correct email addresses, undeliverable emails, full mailboxes, or incomplete distribution lists.

HOME | FILING & SERVICE | ALERTS | SEARCH

► MailBox
Inbox
Sent Items
Rejected Items
Saved Transactions

► Quick Start
State
Court
CaseNumber OR CaseName
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

Click on the Message Boards hyperlink in the Track & Manage area of the Home Page to view your message boards and post/reply to messages.

Message Boards Tips:

- ✓ **Functions:** message board delivers posted messages and replies to those messages to all active case parties via the File & ServeXpress system.
- ✓ **Pricing:** flat rate of \$5/month/message board regardless of how many messages are posted. At the time of activating a Message Board, only the activating firm will be charged. There is no cost to the other case participants to read the message board postings online or to receive email notifications. However, the \$5.00 charge will be implemented on all firms that post replies/messages. Note: ALWAYS CHECK THE FILE & SERVEXPRESS RESOURCE CENTER FOR MOST UP-TO-DATE PRICING.
- ✓ **Activation:** Any organization representing an active case participant can activate the Message Board for that case.
- ✓ **Deactivation:** Message Boards will automatically deactivate when a firm is removed from a case or a case is closed. Any firm that wishes to turn off message board prior to the case being closed must call File & ServeXpress Client Support.

Activating Message Boards

Home > Message Boards

Message Boards

Use Message Boards to view and post messages related to litigation. Click on a Message Board name to read the Subjects and Messages for a specific litigation. New messages are also e-mailed to the active case participants in the litigation on File & ServeXpress.

Activate a Message Board ⓘ

Search

1. To activate a Message Board, the user clicks on the Message Boards hyperlink on the system. They will then see a link to activate a Message Board.
2. After clicking on the “Activate a Message Board”, choose the appropriate jurisdiction, court, and full or partial case name, or case number.
3. Click the Search button. A list of cases will be displayed (screen shot on next page).

Home > Message Boards > Activate a Message Board

Activate a message board for a specific case. All case participants will have access to the message board.

Case Information

Enter search criteria to find your case.

* Jurisdiction: --Select-- ▾

* Court: No courts available ▾

Case Number: ⓘ Case Name: ⓘ

Search

Cancel

Message Board Tips:

- ✓ **Limitations:** Support Staff at a Law Firm can activate a Message Board, but they will need to set up Forward Notifications for the attorney on the case in order to receive email notifications of new postings.
- ✓ **Notifications:** At the time of the Message Board activation, the system will send a notice out to all the File & ServeXpress subscribers on the case, notifying them that a message board has been activated for their case.
- ✓ **Billing References:** Billing references can be provided when activating a message board. Organization Administrators can also set up mandatory billing references for this feature.
- ✓ When another case participant posts a message for the first time to a Message Board, the system will prompt the user, alerting them that they will begin to incur charges and they will have an opportunity to provide a Billing Reference number for the Message Board.

Activate a message board for a specific case. All case participants will have access to the message board.

Case Information
Enter search criteria to find your case.

* Jurisdiction:

* Court:

Case Number: Case Name:

Case Number	Case Name	Message Board Status
<input checked="" type="radio"/>	2006c12356 Money Tree vs. Johnson, Sandy	

Page size: 1 items in 1 pages

Message Board Name

* Message Board Name:

Your organization will be charged \$0.00 per month to activate this message board.

Billing Reference:

To learn more about using this feature visit the [Resource Center](#) page.

Message Board Tips:

- ✓ **Duplicate Message Boards:** A case on File & ServeXpress can have only one Message Board activated. If a user tries to activate a message board for a case that already has one, the case will appear in the results – but the Message Board Status will indicate that a message board has already been activated for the case.

4. Click the radio button next to the case in which you would like to activate a message board.
5. Enter a Billing Reference at your discretion and click the Activate Message Board button.
6. Confirmation: File & ServeXpress will confirm when a Message Board is activated:

Managing Message Boards

When users click on the Message Boards hyperlink in their “Track & Manage” section of the Home Page, they will see a streamlined view of their Message Boards. All columns are sortable, so users only need to click on a column header to change the sort from ascending to descending. When users click on Message Board, the system will default the sort of Message Boards to bring those with unread messages to the “top” automatically.

1. To view unread message board postings, click on the hyperlink of the case name.
2. The page will refresh with all of the postings in that particular message board.
3. To view a posting click on the hyperlink in the Subjects column. Once the page refreshes, a "Reply" hyperlink will appear in the end column of each subject. Click the link to reply to respective messages.
4. To create a new posting, click on the Create New Subject hyperlink.

Activate a Message Board ⓘ Search

Unread	Message Boards	Court	Last Post
	Test on 2305	QA Court	11/6/2017 1:03 PM PST
	Kaiser Aluminum & Chemical vs London Market I...	CA Superior Court County of San Francisco-Civil	8/1/2017 1:22 PM PDT
	Test-Message board	QA Court	9/29/2014 11:25 PM PDT
	Mock Business Court -- Judges	Mock Court-Filing & Serving	3/7/2013 12:41 PM CST
	350 Alabama Street Owners Assoc vs 2051 Harri...	CA Superior Court County of San Francisco-Civil	6/15/2012 1:40 PM PDT
	Billing Court Message Board	File & Serve Billing Court	6/12/2012 9:33 PM EDT

Message Board Tips:

- ✓ **Tack and Note Icon:** The yellow note with a tack in it in the Unread column denotes that there is an unread message board posting in that case.
- ✓ **Sortable Column Headers:** When users click on a specific Message Board name and are taken to all the subjects within that board, the column headers there are also sortable and the subjects with unread messages are also defaulted to be sorted to the top. All columns that display as hyperlinks in the system are sortable.

Message Boards Notifications

Message Board Tips:

Located in Preferences.

Options

My Profile

[My Information](#)

[My Organization](#)

[My ID and Password](#)

My Notification Options

[My Saved Transaction Access](#)

Notification of Message Board Postings

Email Notification of Message Board Postings

- Do not send email
- Individual email notifications** - email notifications of new message board posts as they arrive
- Daily email notification** - one daily email per message board of all postings for the day
Note: Daily emails are sent out at 3:00 a.m. Eastern time.
- Both individual and daily email notifications**

Forward Notification Options

Forward my notifications to the following users when I am notified of new message board messages:

Name	Remove
Pam Paralegal	

Add another user to my list:

1. For Email Notification of Message Board Postings, Attorney users should use “Forward Notification Options”:
 - a. Use the radio buttons to select the type of email notification desired.
 - b. Use the drop-down menu to select individuals to be “copied” on message board postings.
 - c. Click the “Save” button to ensure that your changes are updated in the system.

- ✓ **Note:** All email notifications are complimentary and are not guaranteed. Items that have been electronically served are guaranteed to arrive in users’ Inboxes. We suggest checking the Inbox daily for the most current service information.
- ✓ **Removing a user from the list:** to delete a user from the notification, click the “X” next to the user. To “block” a user from sending notifications to you, select that user in the “Block” drop-down menu.

Receive Notification Options

Notify me when the following users are notified of message board messages:

Name	Remove
Andrew Associate	

Add another user to my list:

- b. 2. For Email Notification of Message Board Postings, Non-Attorney users should use “Receive Notification Options”:
 - a. Use the radio buttons to select the type of email notification desired.
 - b. Use the drop-down menu to select individuals to be “copied” on their message board postings.
 - c. Click the “Save” button to ensure that your changes are updated in the system.

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](#)