



File & Serve *Xpress*<sup>™</sup>

# Custom Document Lists

User Guide

**Custom  
Document Lists**

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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

# Custom Document List Overview

The **Custom Document List** (CDL) functionality allows File & ServeXpress Advanced users to create and manage lists of hand-picked documents that are available on the File & ServeXpress system. Users can name their **Custom Document Lists** and store detailed notes (both private and shared), in addition to storing their documents.

Users may also batch print or download from an existing **Custom Document List**. Once created, a **Custom Document List** is available to all users in the organization via their individual IDs using the **Custom Document List** link in the **Track & Manage** section of the File & ServeXpress **Home Page**. To **view** created Custom Document Lists, click the link the Track & Manage section of the File & ServeXpress Homepage.

The screenshot shows the File & ServeXpress Home Page. At the top right, there are links for 'Preferences | Sign Out', 'Attorney, Adam | Mock Firm A-Bellevue', and 'File & ServeXpress Notices'. Below this is a navigation bar with 'HOME', 'FILING & SERVICE', 'ALERTS', and 'SEARCH'. The main content area is divided into three sections: 'MailBox' (Inbox, Sent Items, Rejected Items, Saved Transactions), 'Quick Start' (State, Court, CaseNumber OR CaseName, File/Serve, Case Search, Set Track Case), and 'Track & Manage' (Transaction ID, Alerts, Tracked Items, Edit Tracked Items, Calendar, Message Boards, My Attorneys, Case View, Document Upload, Case & Party, Management, Billing Information, and Custom Document Lists). A red box highlights 'Custom Document Lists' in the 'Track & Manage' section, and a red arrow points to it from the left.

## CDL Tips:

- ✓ **Functions** (these actions can be performed on any screen where the user sees the “Chose an action” drop down):
  - **Check Boxes.** Use the check box at the top of the column to select/de-select or “check” all of the boxes in the column to perform an action on. Use check boxes in individual rows to select/de-select individual records.
  - **Download documents.** Use to download multiple documents.\*
  - **Print documents.** Use to print multiple documents.\*
  - **Add to Custom Documents List.** Individually select documents to be stored in custom “folders”. Add the documents to existing or new folders and share notes. (See next page for more information on Custom Documents List).
- ✓ **Pricing:** There is no charge to use any of these features. Research charges will apply to all cases/documents on which the attorney is not attorney of record.

\*To use the Download Documents and Print Documents features, batch processing software must be downloaded.

# Creating Custom Document Lists

To add documents to a new **Custom Document List**:

1. Pull up the list of documents or transactions to be added and place a checkmark in the box to the left of the Transaction ID number or document title. To select all documents, choose the check box at the top of the column.
2. Select **“Add to Custom Document List”** in the Choose an action drop-down list at the top of the document list and click the **“Go”** button.

The following documents were forwarded to you.

Filter List

Choose an action:   | Show  records

Unread  
 Read  
 All

Main documents only  
 Main and supporting documents

<input type="checkbox"/>	Transaction	Date/Time	Court	Case Number Case Name	Authorizer Organization	<input type="checkbox"/>	Document Type	Document Title	Size
<input checked="" type="checkbox"/>	52478223	8/23/2017 12:12 PM CDT	Mock Court-Filing & Serving	12C123456 Doe, John vs ABC Corporation	Judge Jerry, Mock Court-Filing & Serving	<input checked="" type="checkbox"/>	Motion for Summary Judgment	plaintiff's motion summary judgment <a href="#">[view]</a>	0.1MB
						<input checked="" type="checkbox"/>	Order	proposed order granting def MJJ <a href="#">[view]</a>	0.1MB

## CDL Tips:

- ✓ **Sample Use:** A firm clerk can create a Custom Document List to earmark the documents served on a client in numerous cases that an attorney needs to review. The clerk can pick documents from any case, specify the order in which the documents should appear to the attorney, and write a note to the attorney with special instructions. The attorney can then open the **Custom Document List**, read the clerk's notes and documents contained in the list, and respond as necessary.
- ✓ Users may select individual documents or transactions from the following areas of the application:
  - Inbox Items (including Calendar events)
  - Sent Items
  - Rejected Items
  - Items for Clerk Review (for court users only)
  - Items for Judge Review (for court users only)
  - Case History Search
  - Daily Docket Search
  - Transaction Status Search
  - Advanced Search
  - Alerts
- ✓ **Note:** At this time, users cannot add documents to a Custom Document List from the Calendar search results page.

- A pop-up window will appear displaying the selected documents. To add documents to a new **Custom Document List**, select the option to “**Create a new Custom Document list**” and click the “**Next**” button.

**Save Custom Document List**

- Add these documents to an existing Custom Document List.
- Create a new Custom Document List.

Next

Selected Documents							
Show <input type="text" value="All"/> records							
1-4 of 4 Selected Documents							
Transaction	Event Date/Time	Case Number	Case Name	Authorizer	Organization	Document Type	Document Title
52478223		12C123456	Doe, John vs ABC Corporation	Judge Jerry	Mock Court-Filing & Serving	Motion for Summary Judgment	plaintiff's motion summary judgment
52478223		12C123456	Doe, John vs ABC Corporation	Judge Jerry	Mock Court-Filing & Serving	Order	proposed order granting def MJJ



After clicking the Next button, the Custom Document List name and notes fields will display.

#### Save Custom Document List

\* Name:

Notes (optional):

Required information is marked with an asterisk (\*).

Next

4. Enter the name of the **Custom Document List**, add notes, and click **“Next”** to submit the changes.
5. After clicking the Next button, a confirmation page will appear confirming the name of the **Custom Document List** that has been created and to which the selected documents were added.

The documents you have selected have been saved as a Custom Document List: **Smith, James Documents**.  
You may view or edit this Custom Document List by clicking on the Custom Document List link in the toolbox on your home page.

For additional assistance, please contact File & ServeXpress Customer Support at 1-888-529-7587.  
Our team is available 24 hours a day, 7 days a week to assist you.

## CDL Tips:

- ✓ **Note:** The **Custom Document List** must be named, although it is optional to enter notes.
- ✓ To view the newly created **Custom Document List**, click the link in the **Track & Manage** area of the File & ServeXpress Homepage:

### ► Track & Manage

Transaction ID

### Alerts

Tracked Items

Edit Tracked Items

Calendar

### Message Boards

My Attorneys

Case View

Document Upload

Case & Party

Management

Billing Information

Custom Document Lists

# Adding Documents to an Existing Custom Document List

To add documents to an existing **Custom Document List**:

1. Pull up the list of documents or transactions to be added and place a checkmark in the box to the left of the Transaction ID number or document title. To select all documents, choose the check box at the top of the column.

Choose an action: **Add to Custom Document List** | **Go** | Show 50 records

1-5 of 5 transactions <<Prev Page 1 of 1 Next>>

<input type="checkbox"/>	Transaction	Date/Time	Court	Case Number Case Name	Authorizer Organization	<input type="checkbox"/>	Document Type	Document Title	Size
<input checked="" type="checkbox"/>	52479912	11/14/2017 11:00 AM PST	QA Court	2017C1077 Mock Collections Agency vs Tom Thomas	Lucy Lawyer, Mock Firm B	<input checked="" type="checkbox"/>	Answer	Answer <a href="#">[view]</a>	0.1MB
						<input checked="" type="checkbox"/>	Motion for default judgment	Motion For Default Judgment <a href="#">[view]</a>	0.1MB

2. Select “**Add to Custom Document List**” in the Choose an action drop-down list at the top of the document list and click the “**Go**” button.
3. A pop-up window will appear displaying the selected documents.

## Save Custom Document List

- Add these documents to an existing Custom Document List.  
 Create a new Custom Document List.

**Next**

## CDL Tips:

- ✓ Users may select individual documents or transactions from the following areas of the application:
  - Inbox
  - Sent Items
  - Rejected Items
  - Items for Clerk Review (for court users only)
  - Items for Judge Review (for court users only)
  - Case History Search
  - Daily Docket Search
  - Transaction Status Search
  - Advanced Search
  - Alerts
- ✓ **Note:** At this time, users cannot add documents to a Custom Document List from the Calendar search results page.



3. To add documents to an existing Custom Document List, select the option to “Add these documents to an existing Custom Document list” and click the “Next” button.

#### Save Custom Document List

Add to Custom Document List:

4. Using the Drop Down Menu, select the name of the Custom Document List in which to add documents and then click the “Next” button.
5. After clicking the Next button, a confirmation page will appear confirming the name of the Custom Document List to which the selected documents were added.

The documents you have selected have been saved as a Custom Document List: **ABC Corporation - Motion for Summary Judgment.**

You may view or edit this Custom Document List by clicking on the Custom Document List link in the toolbox on your home page.

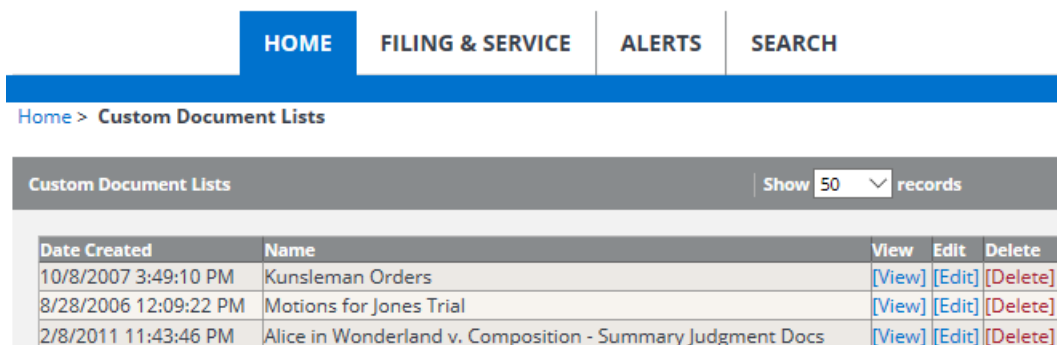
For additional assistance, please contact File & ServeXpress Customer Support at 1-888-529-7587. Our team is available 24 hours a day, 7 days a week to assist you.

# Viewing Custom Document Lists

To **access** an existing **Custom Document List**:

1. Click the **Custom Document Lists** link from the Track & Manage area on the Home Page:

This will bring up a list where Users may view existing Custom Document Lists:



Date Created	Name	View	Edit	Delete
10/8/2007 3:49:10 PM	Kunsleman Orders	<a href="#">[View]</a>	<a href="#">[Edit]</a>	<a href="#">[Delete]</a>
8/28/2006 12:09:22 PM	Motions for Jones Trial	<a href="#">[View]</a>	<a href="#">[Edit]</a>	<a href="#">[Delete]</a>
2/8/2011 11:43:46 PM	Alice in Wonderland v. Composition - Summary Judgment Docs	<a href="#">[View]</a>	<a href="#">[Edit]</a>	<a href="#">[Delete]</a>

2. Click on the **View** hyperlink located in the column to the right of the **Custom Document List** you want to access.

## CDL Tips:

- ✓ **Note:** Custom Document Lists are always shared with all users in the same organization.

After clicking the **View** link, users can view transaction details and open documents using the “view” links.

Home > Custom Document Lists > View "Kunsleman Orders"

Choose an action:

Custom Document List:  
Kunsleman Orders

**Notes:**

Private  Shared

The notes below are available only to you.

New Note:

Previous Notes:

Maximum Characters: 4000

View Created: 10/8/2007 3:49 PM EDT by Adam Attorney  
Last Edited: 1/11/2008 3:11 PM EST by Adam Attorney  
[Printable Version](#)

## CDL Tips:

- ✓ **Note:** Users can also choose to batch print and download documents on this page.
- ✓ **Using “Notes”:** Users can add Private or Shared Notes by choosing the appropriate tab in the “Notes” section of the page and clicking the “Save” button.

**Selected Documents**

Show  records

1-6 of 6 Selected Documents

<input type="checkbox"/>	Transaction	Event Date/Time	Case Number	Case Name	Authorizer	Organization	Document Type	Document Title
<input type="checkbox"/>	16446851		11380-2006	Catroppa, Yvonne vs Amanda Carlton	Robert E Kunselman	PA Beaver County Court of Common Pleas	Order	Denied ((proposed) Order of Court) <a href="#">[view]</a>

# Editing a Custom Document List

To edit an existing Custom Document List:

1. Click the Custom Document Lists link from the Track & Manage area on the Home Page. This will bring up a list where Users may edit existing Custom Document Lists:

Date Created	Name	View	Edit	Delete
10/8/2007 3:49:10 PM	Kunsleman Orders	[View]	[Edit]	[Delete]
8/28/2006 12:09:22 PM	Motions for Jones Trial	[View]	[Edit]	[Delete]
2/8/2011 11:43:46 PM	Alice in Wonderland v. Composition - Summary Judgment Docs	[View]	[Edit]	[Delete]

2. Click on the Edit link in the Edit Column to the right of the Custom Document List that should be accessed.
3. Use this screen to change the name of the Custom Document List, edit or remove notes, change the order of the documents, and remove specific documents.

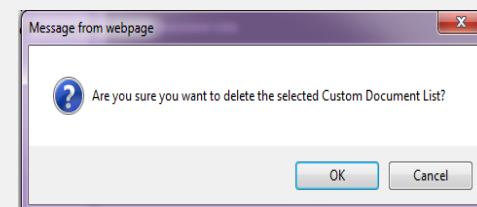
Save Updates Delete Marked Items Cancel

4. When finished with any desired edits, click the “Save Updates” tab to save these changes to the system.

## CDL Tips:

### ✓ Deleting a Custom Document List

After clicking the Delete link, a warning message confirms the delete action. When the user clicks “OK”, the Custom Document List will be removed from the system. Clicking “Cancel” will return the user to the list of Custom Document Lists.



- ✓ **Note:** Once a **Custom Document List** has been deleted from the system, it cannot be accessed again.