

File & Serve *Xpress*[™]

Alerts

User Guide



Alerts

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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

Alerts Overview

The **Alerts** feature is a 24/7 automated assistant that constantly searches the system for cases that match specified criteria and notifies the user of the case by email. Alerts can be used to:

- ✓ Keep abreast of all filing and/or service activity that you may not have been served with.
- ✓ Avoid liability by getting notified of important filings.
- ✓ Research related cases and set up notices for similar filings by other attorneys.
- ✓ Enhance business development by getting notices when your client is named in a new case and access that Complaint immediately.

Alerts Tips:

- ✓ **Pricing:** With File & ServeXpress Alerts, Users are not charged by individual matches. Alerts are only \$20.00 monthly to maintain no matter how many matches are found!

Alerts Overview (continued)

Things to Consider About Alerts Setup and Removal:

1. Each Alert is billed at the rate of \$20 per month per Alert. The \$20 fee includes all notifications that are triggered by the Alert. *Exceptions: Baltimore Alerts are billed @ \$2/setup plus \$0.10 per delivered notification. Rhode Island Asbestos Cases Alerts are Free of Charge. Always check the File & ServeXpress Resource Center for the most up-to-date Alerts pricing.*
2. Alerts billing will be processed on a monthly basis until the Alert is disabled or deleted by the user. *Note: Charges will stop being billed the month following the month an Alert is deactivated.*
3. Alerts are not dependent on the Case Status. If a case is settled or closed, the Alert will still be billed until it is disabled or deleted by the user. The system does not have a mechanism to disable the Alert automatically- it is a manual process. *Note: If the Alert was shared with any other firm member, it will continue to run and will continue to be billed until all users with whom it was shared disable or delete the Alert from their account(s). If you are not sure what users are sharing the Alert, contact Client Support.*
4. Alerts is an optional premium service and a user's presence on the service list of a case does not remove or disable charges for an Alert.
5. Alerts maintenance is the sole responsibility of the user. Users can temporarily disable Alerts by clicking on the "Edit" link and choosing the "Disable Alert" radio button, or delete it on the Alert Configurations page (screenshots below).

You can choose to receive an email notification for your Alert or you can monitor your results online.

Alerts Tips:

- ✓ **Limitations:** Alerts are only triggered if a document is submitted with the File & ServeXpress system and if the document identically matches the Users Alert criteria. Alerts are not triggered by paper-filed documents if the court does not update File & ServeXpress. Serve Only – Private documents will only be generated if your firm is on the service list. Please allow up to 24 hours for Alerts to process.
- ✓ **Note:** Alerts can be shared by members of the same firm at no extra charge using the “Share Alert” drop-down menu.

Alerts Setup

To access existing Alerts and set up new Alerts, click the Alerts link in the Track & Manage area of the Home page.

The page will refresh with the Alerts screen:

Name	Unread	Enabled	Owner	Actions
Notices - Civil Case Class	Y	Y	Y	Edit Copy Delete

1. To set a new Alert, click the  button to go to the Alerts setup page.

Alert Setup

Alert Name

Billing Reference

Email Notification Do not send me email notification Send me email notification

Temporarily Disable Alert Do not disable alert Disable alert

Alert On My Firm's Transactions Transactions in my Firm's Cases Transactions in All Cases

Share Alert

▶ 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

Alerts Tips:

2. Enter a name for your Alert (names should be as descriptive as possible so that you easily recognize what the Alert is for).
3. Select your Email preference for your Alert.
4. Select your Shared preferences in order to share your alert with other users in your firm.

The screenshot shows the Alerts Setup interface with the following sections:

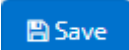
- Case Information:**
 - * Case: Search field with "Find" and "Clear" buttons.
 - * Case Group: Search field with "Find" and "Clear" buttons.
 - * Court: Dropdown menu.
 - Case Class: Dropdown menu.
 - Case Type: Dropdown menu.
- Document Information:**
 - Document Type: Dropdown menu with options: Motion/Petition, \$2 Filing Fee, \$2.00 E-File Fee.
 - Document Title (contains): Text input field.
- Party Information:**
 - Authorizing Attorney/Firm: Search field with "Find" and "Clear" buttons.
 - Served Attorney/Firm: Search field with "Find" and "Clear" buttons.
 - Judge: Search field with "Find" and "Clear" buttons.
 - Sending Party: Search field with "Find" and "Clear" buttons.
 - Served Party: Search field with "Find" and "Clear" buttons.
 - Party In Case (contains): Text input field with a "?" icon.

5. Select a court and/or a case to run Alerts in (you must select at least one).
6. If desired, Alerts can be run in multiple courts and/or cases. To select multiple courts and/or cases, simply use the drop-down menus and click on each desired entry until your criteria is complete.
7. Select Case Class(es) and/or Case Type(s) (optional).
8. If you wish to search on a specific Document Type, select that Document Type from the list. (use the CTRL key to make multiple selections). If you wish to have an Alert set for all Document Types in your court/jurisdiction, simply skip over this section.

- ✓ **Note:** All fields after the Alerts Setup section (i.e. Case Information, Document Information, and Party Information) are considered “and” connectors. Searches will be performed to validate that each selected criteria is found in a search.

- ✓ **“Add All” Hyperlink:** Once you have selected a Court, an [Add All](#) hyperlink will be displayed. If you click this hyperlink, all Courts within that specific jurisdiction will be added to your Alert criteria.

- ✓ **“Remove” Hyperlink:** Once you have selected any number of Courts, a [<<remove](#) will be displayed. If you click this hyperlink, the respective Court will be removed from the list.

9. Enter words to search for in document titles if desired. (**Note:** using this criteria will narrow your search results to documents including those words only).
10. Enter criteria for Party information. You may choose to enter information for any or all of the following criteria: Authorizing (sending) firm, Authorizing Attorney, Served Attorney, Served Firm, Sending Party, Served Party or Party in Case. (**Note:** entering information for all criteria will narrow your search results to documents including all of the criteria you select).
11. Click the  button.

Alerts Tips:

- ✓ **Limiting Alerts:** When adding Alert criteria, “less is more”. In other words, the more criteria that are entered, the more specific the system will try to make the search. If any one criterion does not match, the Alert may not find exactly what you are looking for. (e.g. if document type “Complaint” is selected and the document is filed under “Complaint and Jury Demand” the Alert will not be triggered). To guarantee that your Alert will pick up all variations of a filing type used, be sure to include all similar Filing Types. [Alerts](#)

Modifying Existing Alerts

Name	Unread	Enabled	Owner	Actions
Notices - Civil Case Class	Y	Y	Y	Edit Copy Delete

To view or modify an existing Alert, click the following hyperlinks:

1. **Alert Name Hyperlink** – To view new Alerts, click on the Alert name to be directed to new transactions that match your **Alert** criteria.
2. **Edit** – Make changes to existing Alerts, including temporary disable of Alert.
3. **Copy** – Copy an existing alert, make changes and save as a new Alert.
4. **Delete** – Permanently disable an alert.

Conflicts in Setup

When setting Alerts, you may on occasion get conflict errors and be asked to edit your Alert criteria. Conflicts are caused by selecting a Court, Case Class or Type, and Document Types that do not match. For instance:

- ✓ If selecting criteria to search for “Complaints” in Domestic Relations cases in Colorado, you would get a conflict because complaints are not a document type available in Colorado Domestic Relations cases, or
- ✓ If selecting criteria to create an Alert for “Water Cases” in San Francisco, you would get a conflict because water cases are not a supported case class in San Francisco.

Alerts Tips:

- ✓ **Columns: Unread, Enabled, and Owner** columns will show either a “Y” for Yes or an “N” for No to designate whether or not there are new Alert items, the Alert is enabled, or the User is the owner of the Alert.
- ✓ **Editing Alerts:** Only the author of an Alert can make changes. Other users can copy an Alert and make edits to their own copy if desired. A Shared Alert recipient can:
 - Change email notification options
 - Delete the Alerts from their own inbox if desired