File & Serve Xpress

My Organization Profile

User Guide



My Organization
Profile Organization
Administrator

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File & ServeXpress - Resources Available

File & ServeXpress Resources

- File & ServeXpress 24/7 Client Support is available to assist you with technical, User 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 the File & ServeXpress site by clicking on the Resource Center link at the bottom of your screen. The Resource Center contains our training registration information, jurisdiction specific rules & 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.
- ❖ 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

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 888-5297587 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.





HOME FILING & SERVICE ALERTS SEARCH

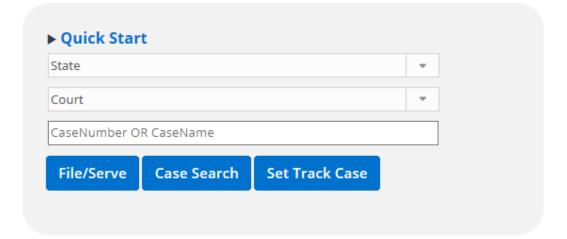
▶ MailBox

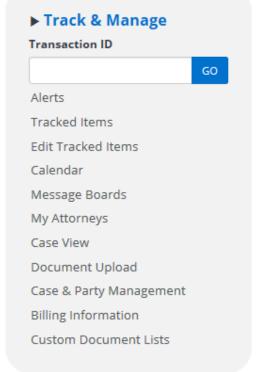
Inbox

Sent Items

Rejected Items

Saved Transactions







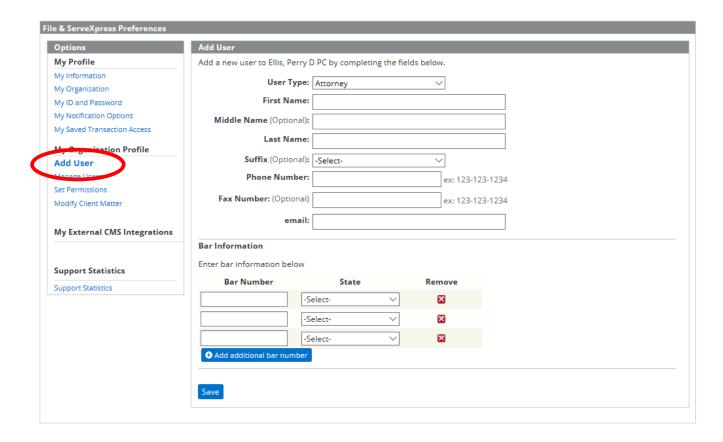
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Client Support

1-888-529-7587

Chat Online

Add User Link



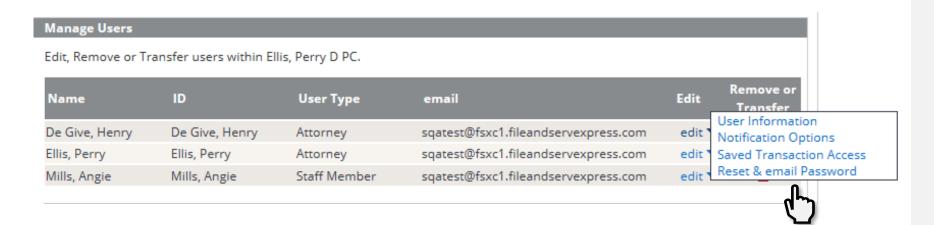
- * The Add User link allows Organization Administrator's to create additional User ID's in their firm.
 - Complete the open type fields and drop down menus.
 - Click the "Save" button at the bottom of the page to submit the request.
 - A welcome email will be sent to the new User within 48 hours with a login ID and temporary password.
- Additional Bar Numbers/States can be added for "Attorney" Users. "Staff Member" users will not be required to add a Bar Number



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



- The Manage Users link allows Organization Administrator to edit, remove, or transfer any of the organization's current users.
- 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.
- Click on the "Remove Or Transfer" box next to a User to:
 - Delete a User from a firm.
 - 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.



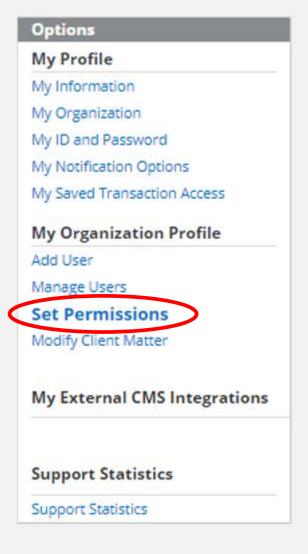
Options My Profile My Information My Organization My ID and Password My Notification Options My Saved Transaction Access My Organization Profile Add User Manage Users Set Permissions Modify Client Matter My External CMS Integrations Support Statistics Support Statistics

Set Permissions Link

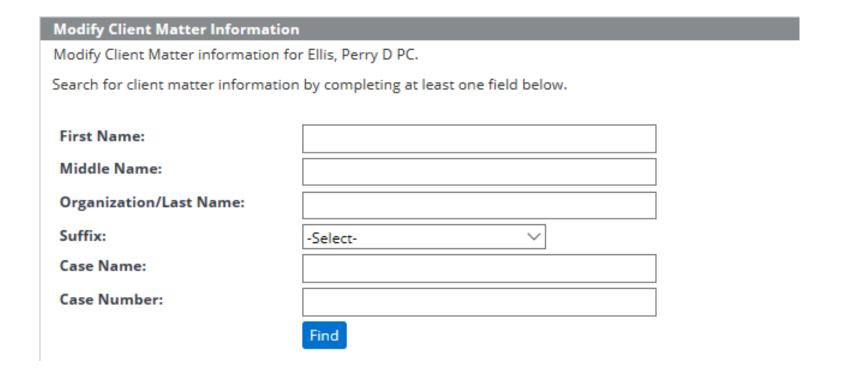
Set Permissions							
Grant users within Ellis, Perry D PC to have certain administrative rights. (See below for details)							
Name	ID	email	Organization Administrator		Modify Organization	Remove User	Add/Modify User
De Give, Henry	De Give, Henry	sqatest@fsxc1.fileandservexpress.com					
Ellis, Perry	Ellis, Perry	sqatest@fsxc1.fileandservexpress.com	\square		\checkmark	\checkmark	
Mills, Angie	Mills, Angie	sqatest@fsxc1.fileandservexpress.com			\checkmark		abla
Save							

- The Set Permissions link allows Organization Administrator to share Organization Administrator rights with other firm members.
- 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



- The Modify Client Matter link allows Organization Administrator 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.
- Search for client matter information by entering information in the blank fields and drop-down menu and click "Find".



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

Modify Client Matter Link Continued



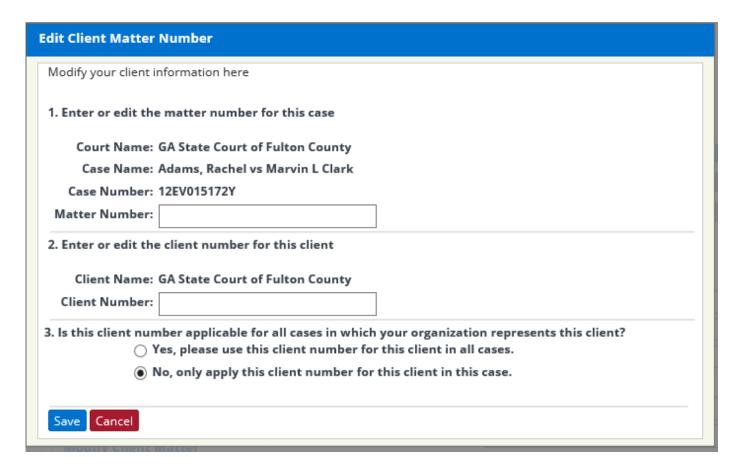
- Scroll through the list of information provided to manually locate client.
- Click "Edit"



Modify Client Matter Link Tips:

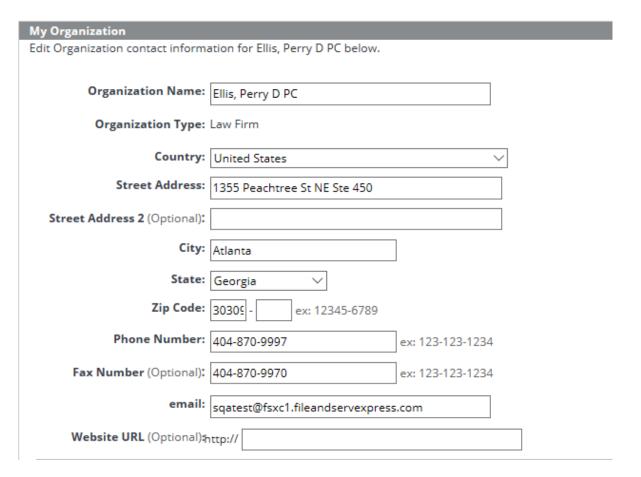
Note: The OA can also mandate the entering of firm codes to all billable sections of the system, so that those codes appear next to all entries on the invoice. See the "My Organization" link section below for details.

Modify Client Matter Number Continued



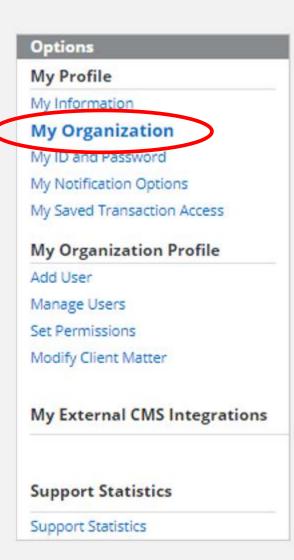
- Enter your new information in the "Matter Number" and "Client Number" fields.
- Click the radio button next to Yes, please use this client number for this client in all cases or No, only apply this client number for this client in this case.
- Click Save to save your changes and return to the Modify Client Matter Information screen

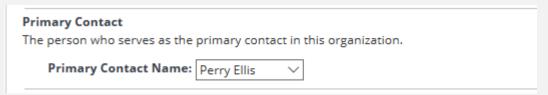
My Organization Link



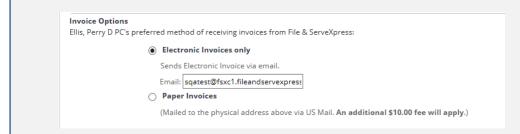
- The **My Organization** link allows Organization Administrator to edit the organization information, update the primary contact, choose invoice options, enter a billing contact, create mandatory billing references, and enable notes.
- * To edit the **organization contact information**:
 - Type the new information in the blank fields.
 - Use the drop down menus to select Country and State.
 - Click the "Save" button to ensure that your changes are updated in the system.







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



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.



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.

	atory Billing Reference ay require File & ServeXpress users in your organization to enter a billing reference for each charge incurred.
Select	when users within Ellis, Perry D PC are required to enter a billing reference:
	Select All De-Select All
	Submit Filing & Service transaction
	Create an alert
	Search
	Search a document/transaction
	Search a case history
	Search for cases
	Search a daily docket
	Search a transaction status
	Purchase a document
	Calendar Events Search
	Transaction Report
	View Read Status
	Message Board
	Document Upload

To select charges to be mandated for billing references:

- Use the series of checkboxes to select/deselect the charges for mandatory billing information.
- Use the "Select All" and "De-Select All" links to choose all or un-choose all boxes at once.
- Click the "Save" button to ensure that your changes are updated in the system.

Notes You may allow File & ServeXpress users in your organization to enter notes for: Custom Document List Notes Case Notes (available in Case History) Document Notes (available in Case History)

- To enable or disable notes for custom document list, case notes, or document notes:
 - Use the series of checkboxes to select/deselect the notes to be enabled/disabled.
 - Click the "Save" button to ensure that your changes are updated in the system