

# File & Serve *Xpress*™

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## My Profile - User Guide



# File & Serve*Xpress*

## My Profile

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## File & ServeXpress Resources

**File & ServeXpress has many resources available to you in order to address your questions and concerns.**

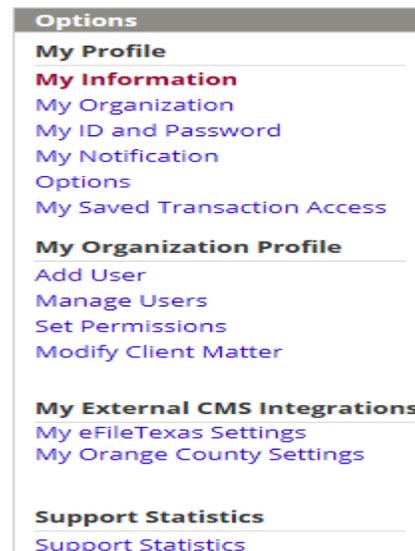
- **File & ServeXpress 24/7 Client Support** is available to assist you with technical, ID, functionality and any other questions you may have. You can contact Client Support at 1-888-529-7587.
- **File & ServeXpress Resource Center** is available within File & ServeXpress by clicking on the Resource 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** <https://secure.fileandservexpress.com/Login/Login.aspx> 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.

## My Profile Overview

File & ServeXpress is a self-service system when it comes to updating User settings. To update personal information and user preferences, users can click on the “Preferences” link located in the upper right corner of the File & ServeXpress Home Page.

[Preferences](#) | [Sign Out](#)  
Lawyer, Lucy | Mock Firm B

Once the screen refreshes, information can be maintained using the links located on the left side of the screen in the **My Profile** section of the page. The system will default to the “My Information” link when “Preferences” is opened.



## My Profile Tips:

- ✓ **Note:** The *My Organization Profile* section is where the Organization Administrator will go to conduct items such as adding/deleting users and setting permissions – please see [My Organization Profile- Organization Administrator User Guide](#) for more information.

# My Information Link

**My Information**

Modify your personal information below.

**User Type:** Attorney

**First Name:**

**Middle Name (Optional):**

**Last Name:**

**Suffix (Optional):**

**Phone Number:**  ex: 123-123-1234

**Fax Number: (Optional)**  ex: 123-123-1234

**email:**

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**Bar Information**

Enter your bar information below

Bar Number	State	Remove
<input type="text" value="111"/>	<input type="text" value="Alaska"/>	<input type="checkbox"/>
<input type="text" value="987654"/>	<input type="text" value="Indiana"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text" value="-Select-"/>	<input type="checkbox"/>

[Add additional bar number](#)

**Save**

1. The **My Information** link allows users to modify their personal information including contact numbers and email address. It is important to keep this information current, especially your email address as this is the address where all email notifications will be sent.
  - a. Use the drop down menus (where provided) to select appropriate information.
  - b. Type the new information in the blank fields.
  - c. Click the “Save” button to ensure that your changes are updated in the system.

**Options**

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## My Organization Link

**My Organization**

**You do not currently have access to modify Organization information. Please contact one of the following Administrators for assistance.**

Lisa Lawyer – Organization Administrator (303)-555-1212

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**Organization Name:** Mock Appeals Firm B-Demo  
**Organization Type:** Law Firm  
**Country:** United States  
**Street Address:** 13427 NE 16th St  
**Street Address 2 (Optional):**  
**City:** Bellevue  
**State:** California  
**Zip Code:** 98005  
**Phone Number:** 555-555-5555  
**Fax Number:** 555-555-5555  
**email:** laurie.machado@lexisnexis.com  
**Website URL (Optional):**

1. The **My Organization** link allows Organization Administrator'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. Only Organization Administrators (OA's) have the rights to change this information. If you are not sure who your OA is, you can find their name and contact information at the top of the "My Organization" page.

**Options**

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**Support Statistics**

[Support Statistics](#)

# My ID and Password Link

**My ID and Password**

**ID**

ID must: - Consist of 4 to 14 characters  
- Not contain following characters: <>

ID: Max Powers

Change ID (Optional):

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**Change Password**

Your new password must: - Consist of 6 to 50 characters  
- Not include any spaces  
- Contain at least one letter and one number  
- Not include special characters (except !@#\$%^\*()\_+)  
- Not include your ID  
- Not include your first or last name  
- Not match your previous 5 passwords

Current Password:

Change Password:

Re-type Password:

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**Security Question**

Security Question 1:

Security Answer 1:

Security Question 2:

Security Answer 2:

**Save**

1. The **My ID and Password** link allows users to change their ID and Password at their discretion. Be sure to read the caveats provided before making the changes.
  - a. Type the new information in the blank fields.
  - b. Click the “Save” button to ensure that your changes are updated in the system.
2. Users may also enter Security Questions/Answers in cases of forgotten login information.
  - a. Use the drop down menus to select Security questions.
  - b. Type the new information in the blank fields.

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## My ID and Password Link Tips:

- ✓ “Forgot Password” link: Security questions/answers can be retrieved with the “Forgot password” link on the File & ServeXpress login page.

**File & ServeXpress™**  
The e-Filing & e-Service Experts™

Sign In to File & ServeXpress™

Password

**Sign In**

[Forgot Password](#) | [Reset Password](#)

Need more help?  
Call Customer Support at 1-888-529-7587

c. Click the “Save” button to ensure that your changes are updated in the system.

# My Notification Options Link

1. The **My Notification Options** link allows users to set up complimentary email notifications for inbox items, message boards, and electronic invoices.

**My Notification Options**

Notification Options for Lucy Lawyer.

**Notification of Inbox Items**

**Email Notification of Inbox Items**

Do not send email

Individual email notification - email notification of new Inbox items as they arrive

Daily email notification - one daily email per court that includes notification of all new Inbox items for the day - no documents attached  
Note: Daily emails are sent out at 3:00 a.m. Eastern time.

2. **Attorney** users can forward **Email Notification of Inbox Items** to other organization members by using “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 inbox items.
  - c. Click the “Save” button to ensure that your changes are updated in the system.

### Forward Notification Options

Forward my notifications to the following users when I am served or notified of transactions:

Name	Remove
Add another user to my list:	
<div style="border: 1px solid #ccc; padding: 2px;"> <p>-Select-</p> <p>TEST DEFT ATTY 2</p> <p>Paul Paralegal</p> <p>Sally Secretary</p> </div>	Block

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## My Notification Option Link Tips:

- ✓ **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.

3. **Non-Attorney** users can use “Receive Notification Options” to set up **Email Notification of Inbox Items** that are served on attorneys within their organization:
- 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 inbox items.
  - c. Click the “Save” button to ensure that your changes are updated in the system.

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### 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
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Add another user to my list:

Users who are forwarding message board notifications to me:

Name	Block
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4. 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.

#### Receive Notification Options

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

Name	Remove
------	--------

Add another user to my list:

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5. 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.
  
6. For **Notification of Billing Invoice**:
  - a. Use the check box to select or de-select the option to receive an automatic email containing the firms invoice.
  - b. Click the “Save” button to ensure that your changes are updated in the system.

**Notification of Billing Invoice**

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**Electronic Billing Invoice**

Send monthly email containing Electronic Billing Invoice

[Save](#)

**Options**

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## My Saved Transaction Access Link

1. The **My Saved Transaction Access** link allows users to give other firm members access to their “Saved Transactions” queue (located on the Filing & Service tab).
  - a. Use the drop-down menu to grant individuals access to saved transactions.
  - b. To remove a user, click the “X” next to the user.

**My Saved Transaction Access**  
Choose from the list below to grant members of your organization access to your Saved Transactions.

Give access to my Saved Transactions to:

<u>Name</u>	Re
Paul Paralegal	<div style="border: 1px solid black; padding: 2px;"><p>-Select-</p><p>TEST DEFT ATTY 2</p><p>Larry Litigator</p><p>Sally Secretary</p></div>

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