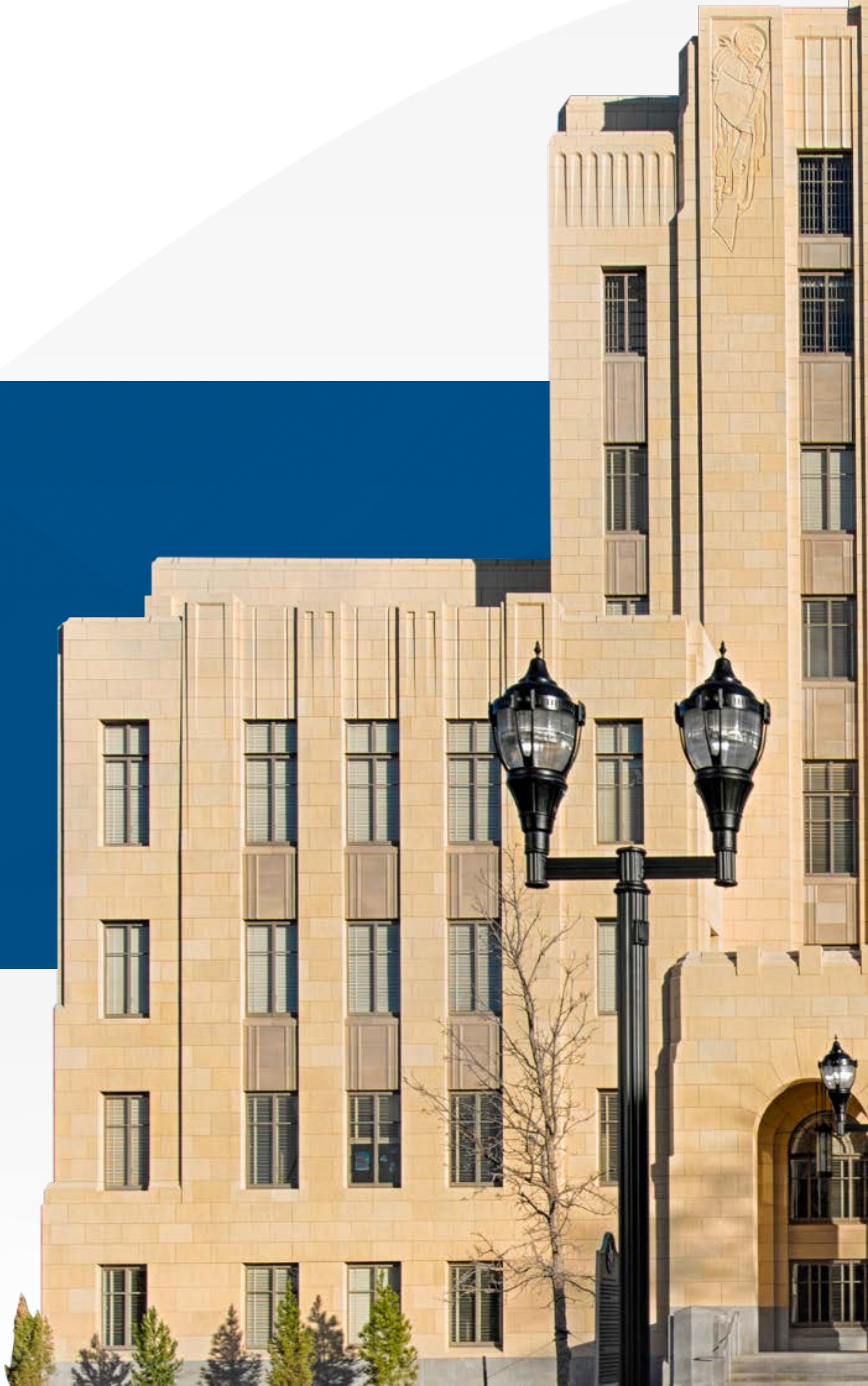
File & Serve Texas™

USER GUIDE

Firm Administrator



AGENDA

TABLE OF CONTENTS

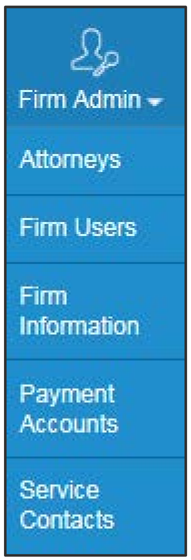
FILE & SERVE TEXAS RESOURCES

- File & Serve Texas has many resources available to you in order to address your questions and concerns:
- **File & Serve Texas Client Support** is available to assist you with technical, ID, functionality and any other questions you may have. You can contact Client Support at 888.529.7587.
- **File & Serve Texas Training & Resource Center** contains helpful information for using the File & Serve Texas system. The File & Serve Texas Training & Resource Center houses our training registration information, user guides, pricing, and more. Click here to access.
- **File & Serve Texas Login Page** is where you can find password help, a link to the registration page, and links for help and contact information. Click here to access the login page.

FILE & SERVE TEXAS
FIRM ADMINISTRATOR OVERVIEW

This File & Serve Texas User Guide provides a convenient source of information to help you efficiently make updates to your account as a firm administrator. The administrator has the following dropdown list on their dashboard:

Before You Begin



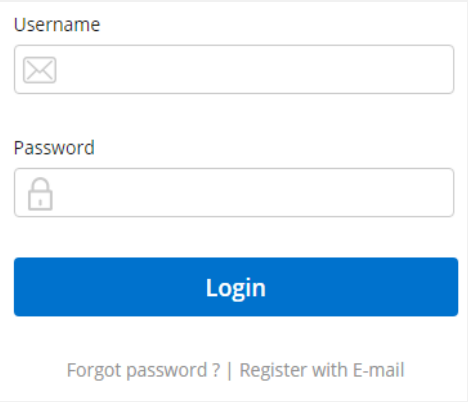
1. Refer to the appropriate court rules o n electronic filing prior to using File & Serve Texas to ensure that you are in compliance with local requirements.

2. Check our minimum system requirem ents to be sure your computer is correctly configured for using File & Serve Texas.

3. If you need assistance, call our Client Support line at 1-888-529-7587.

File & Serve Xpress

Logging in to File & Serve *Texas*



1. Before using File & Serve Texas, you must have an ID and Password. If you do not have these, click the *Register with E-mail* link on the Login page.

2. Open your internet browser and click here to access the login page.

3. Enter your ID and password and click **Login.**

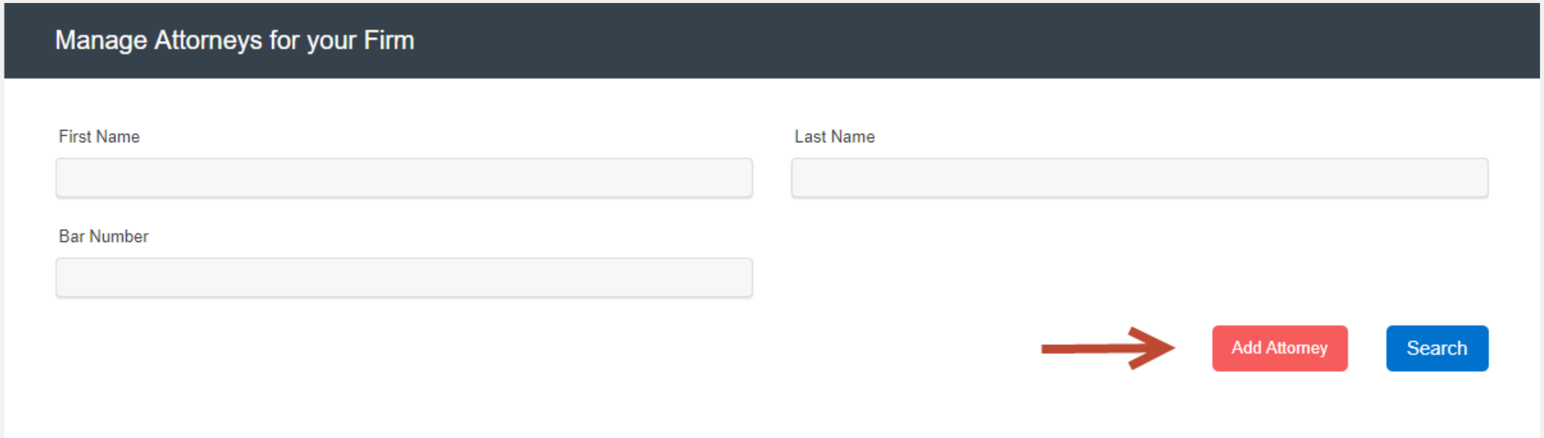
File & Serve Texas

How to Add, Update, or Remove Firm Attorneys (Attorneys Tab)

To **ADD*** an Attorney, follow these steps:

1. Click on the **Add Attorney** button under the Firm Admin drop-down menu.

2. This will open a new screen. Click on **Add Attorney** to begin.



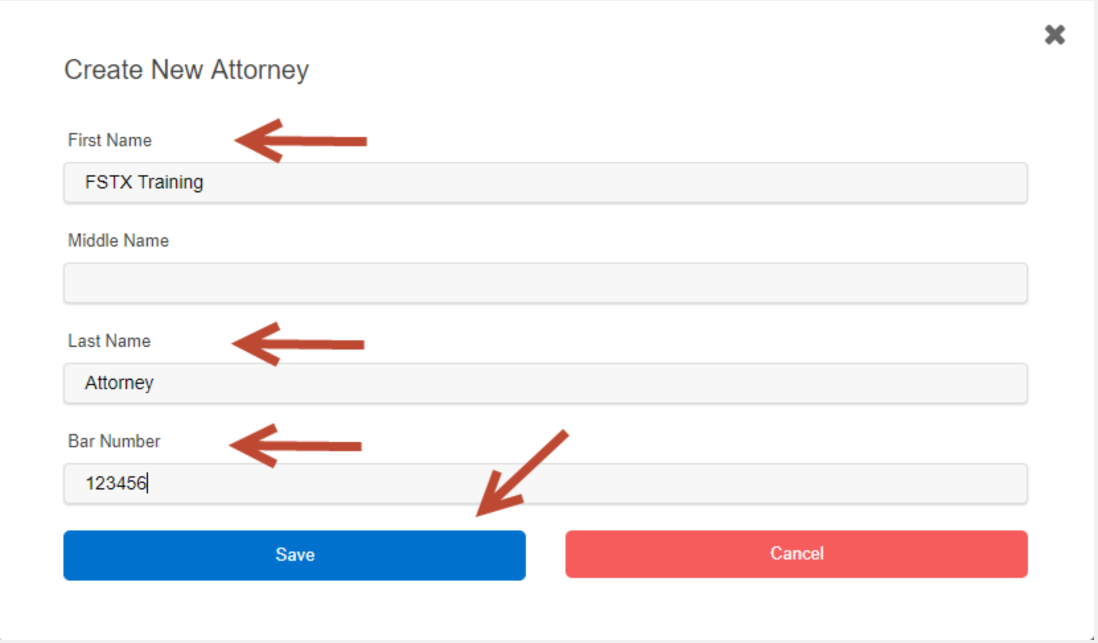
*Note: Adding a new attorney in FSTX to an existing account is a 3-Step process:
Add attorney in attorney list w/bar#,
Add attorney in firm user list w/email (page 11 & 12),
Add attorney to service contact w/email and admin copy email (page 22).

How to Add, Update, or Remove Firm Attorneys (Attorneys Tab)

File & Serve Xpress™

To **ADD** an Attorney, follow these steps:

3. Enter the attorney's information and click **Save** to add them to the attorney list



First Name	Last Name	Bar Number	Actions
FSTX Training	Attorney	24049224	

The Attorney will be added to the list.

File & Serve Texas™

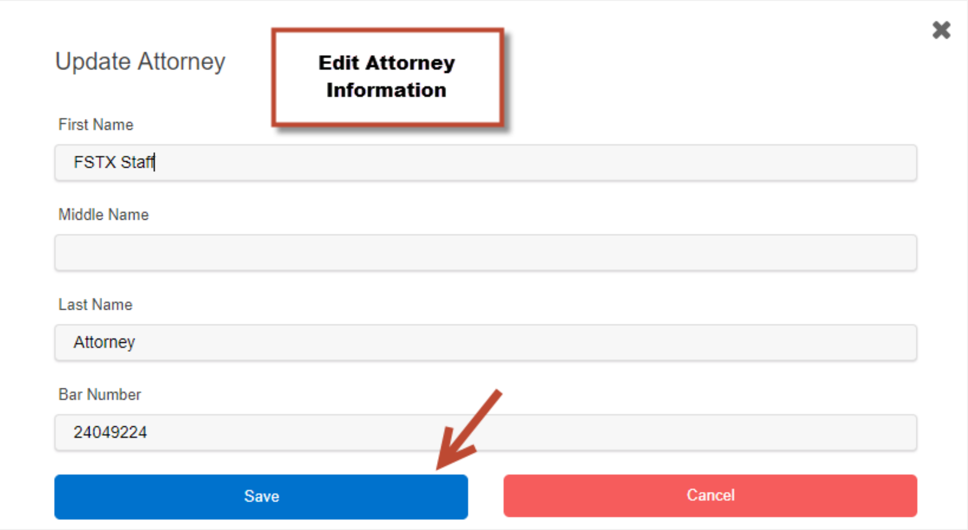
How to Add, Update, or Remove Firm Attorneys (Attorneys Tab)

To **Update** an Attorney, follow these steps:

4. Click on the **Pencil Icon** button:

First Name	Last Name	Bar Number	Actions
FSTX Training	Attorney	24049224	

5. This will open a new screen:



How to Add, Update, or Remove Firm Attorneys (Attorneys Tab)

To **Remove** an Attorney, follow these steps:

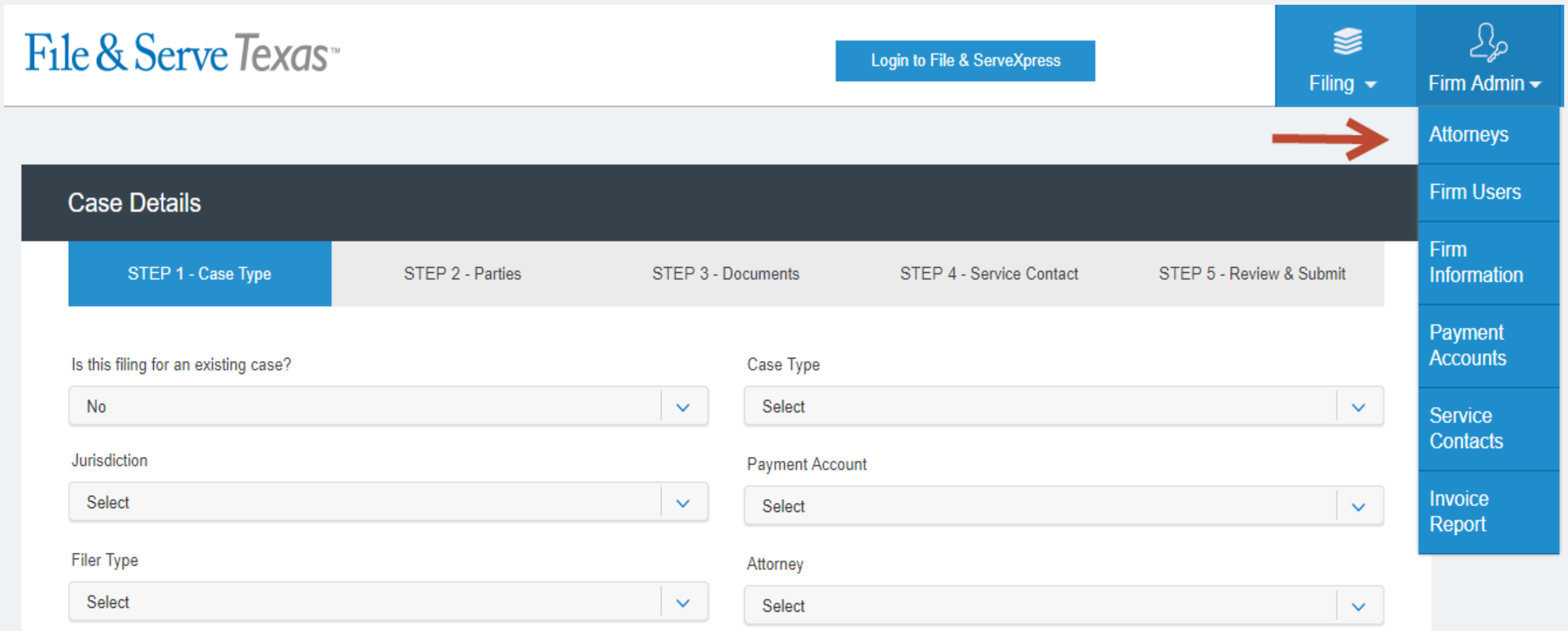
5. Click on the **Trash Can** button:

First Name	Last Name	Bar Number	Actions
FSTX Training	Attorney	24049224	

How to Search for Firm Attorneys (Attorneys Tab)

To **Search** for a Firm Attorney, if you need to update their name or they have left the firm, follow these steps:

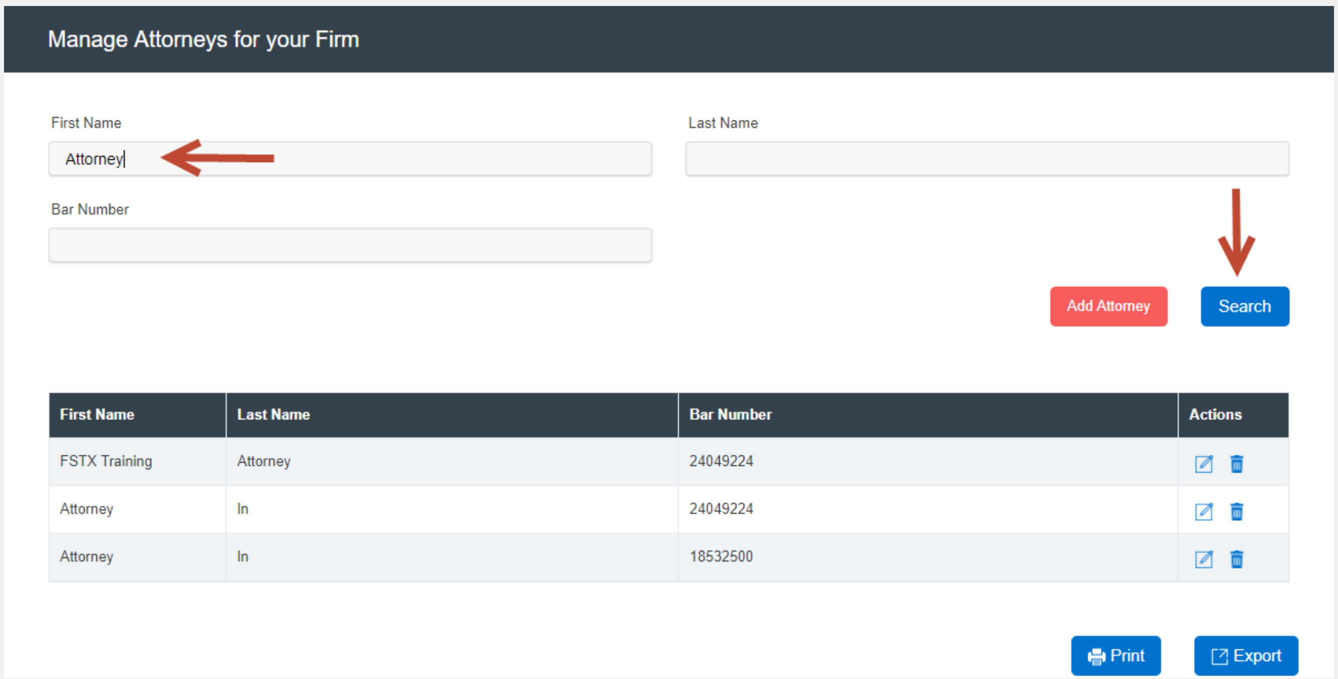
1. Click on the **Attorneys** button under the Firm Admin tab.



How to Search for Firm Attorneys (Attorneys Tab)

2. This will open a new screen. Enter First, last name, or bar number and click **Search**.

3. This will populate the screen with the user(s) that match your search criteria. Results will be sorted alphabetically by last name, first name.

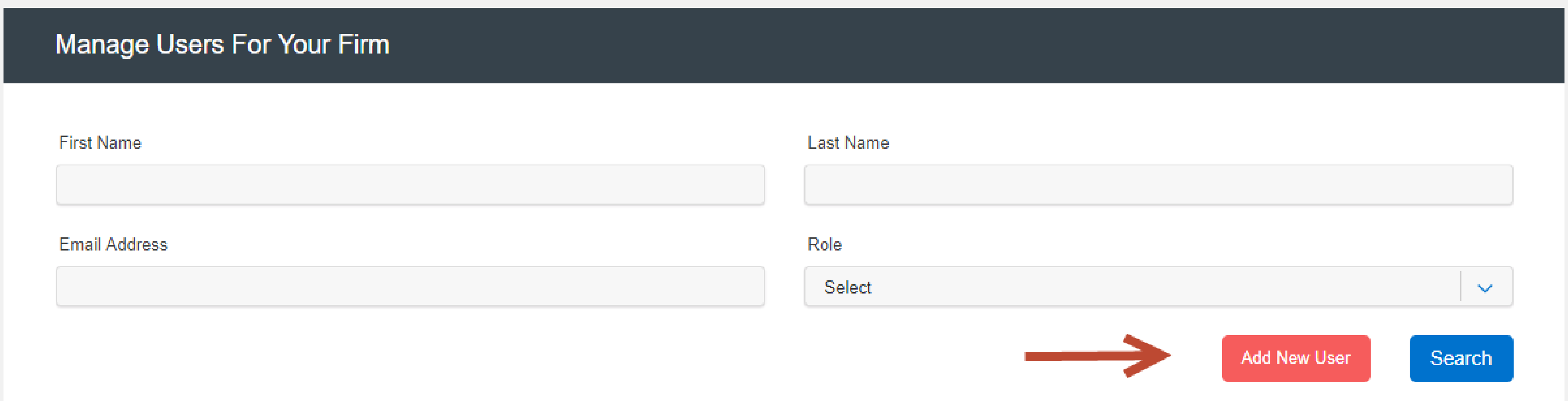


How to Add, Update, or Remove Firm Users (Firm Users Tab)

To **Add** a Firm User, follow these steps:

1. Click on the **Firm Users** button under the Firm Admin drop-down menu.

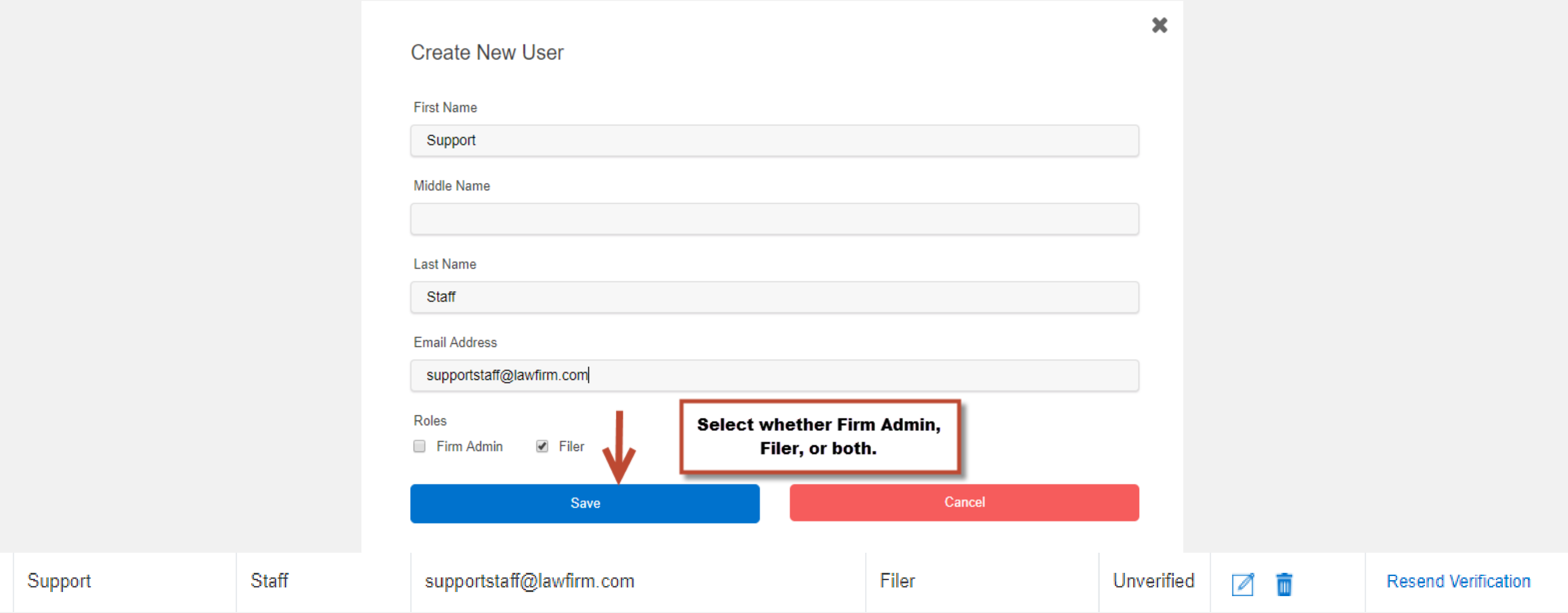
2. This will open a new screen. Click on **Add New User** to begin. **Note**: You will be adding support staff members. If attorneys will be filing as well, you will add both attorneys and support staff under Firm User.



How to Add, Update, or Remove Firm Users (Firm Users Tab)

To **Add** Firm User, follow these steps:

3. Enter the Firm User information and click **Save** to add them to the Firm Users list.



When added to the Firm, the Firm User will receive an activation email from no-reply@efiletexas.gov. The Firm User will need to activate their account. Once activated, "Unverified" will change to "Active".

How to Add, Update, or Remove Firm Users (Firm Users Tab)

To **Update** a Firm User, follow these steps:

4. Click on the “**Pencil Icon**” button update Firm User information.

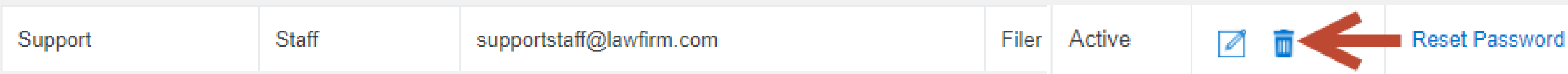
5. If the Firm Users have forgotten their password, you can **Reset Password**.

Support	Staff	supportstaff@lawfirm.com	Filer	Active		Reset Password

How to Add, Update, or Remove Firm Users (Firm Users Tab)

To **Remove** a Firm User, follow these steps:

6. Click on the **Trash Can** button:



How to Search for Firm Users (Firm Users Tab)

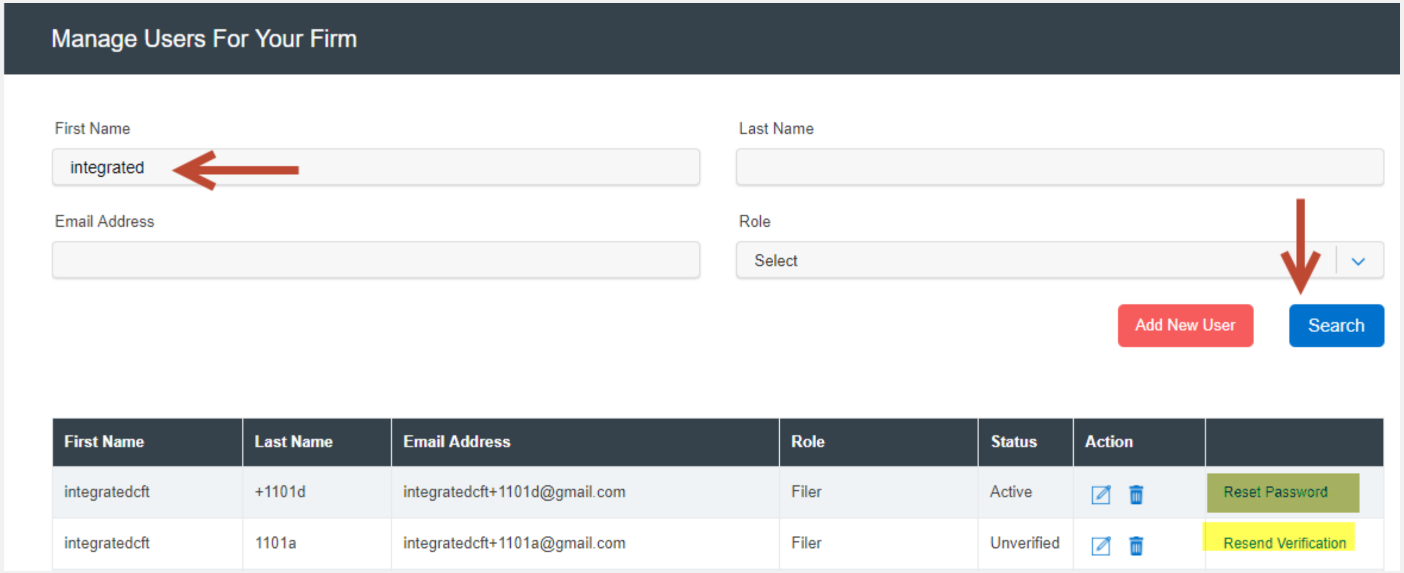
File & Serve Xpress™

To **Search** for a Firm User if you need **to reset their password**, **resend verification**, or if they have

left the firm { } follow these steps:

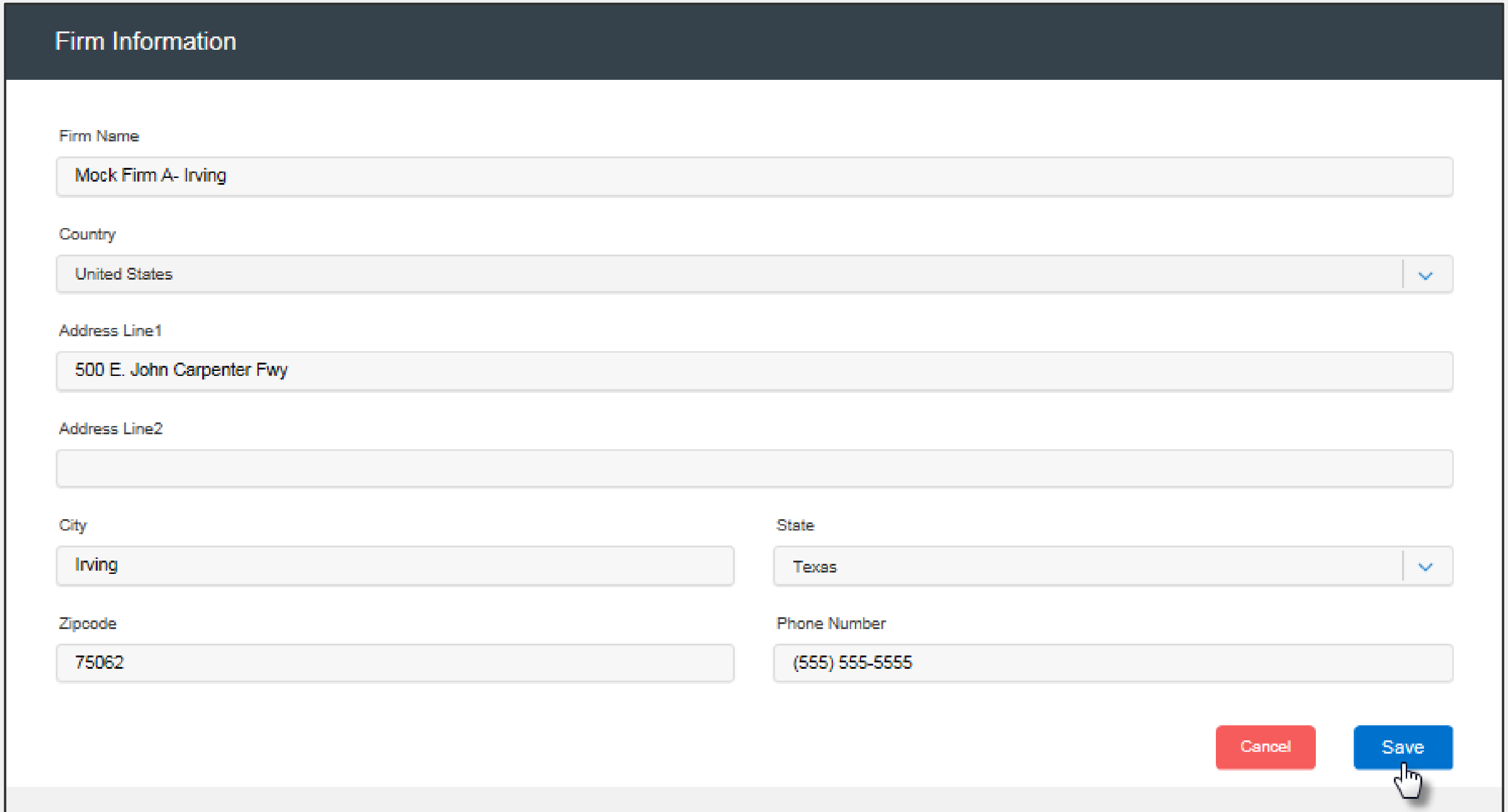
Users have the ability to search for a Firm User by first name, last name or email.

1. Enter any/all of the users information and click **Search**:
2. This will populate the screen with the user(s) that match your search criteria.
3. Results will be sorted alphabetically by last name, first name.



Firm Information Tab

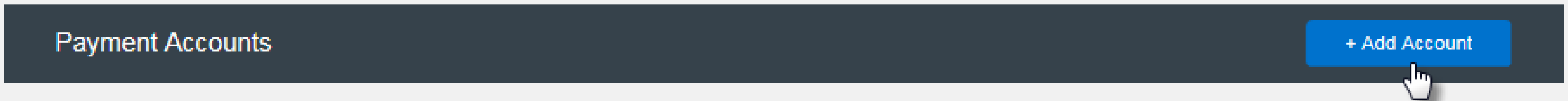
To **Update** any of your firm's information, make your changes in the fields provided and click **Save**:



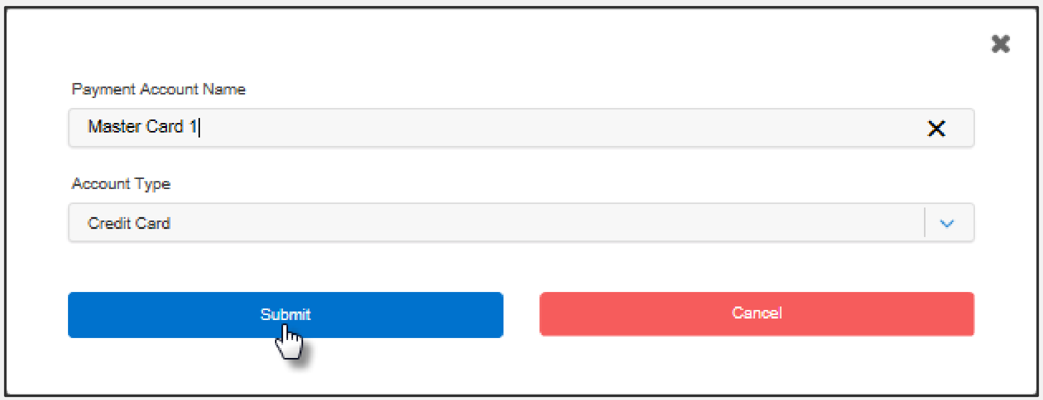
Payment Accounts Tab

To **Add** a credit card account (adding a waiver account follows), follow these steps:

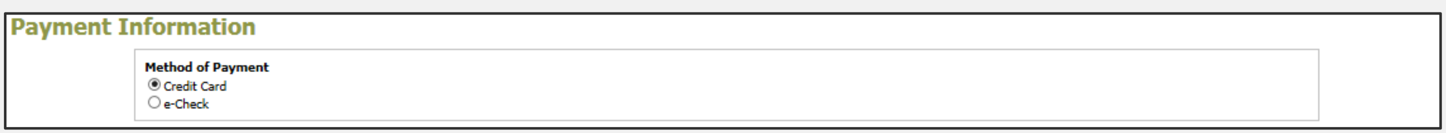
1. Click on the **Add Account** button:



2. This will open a new screen:

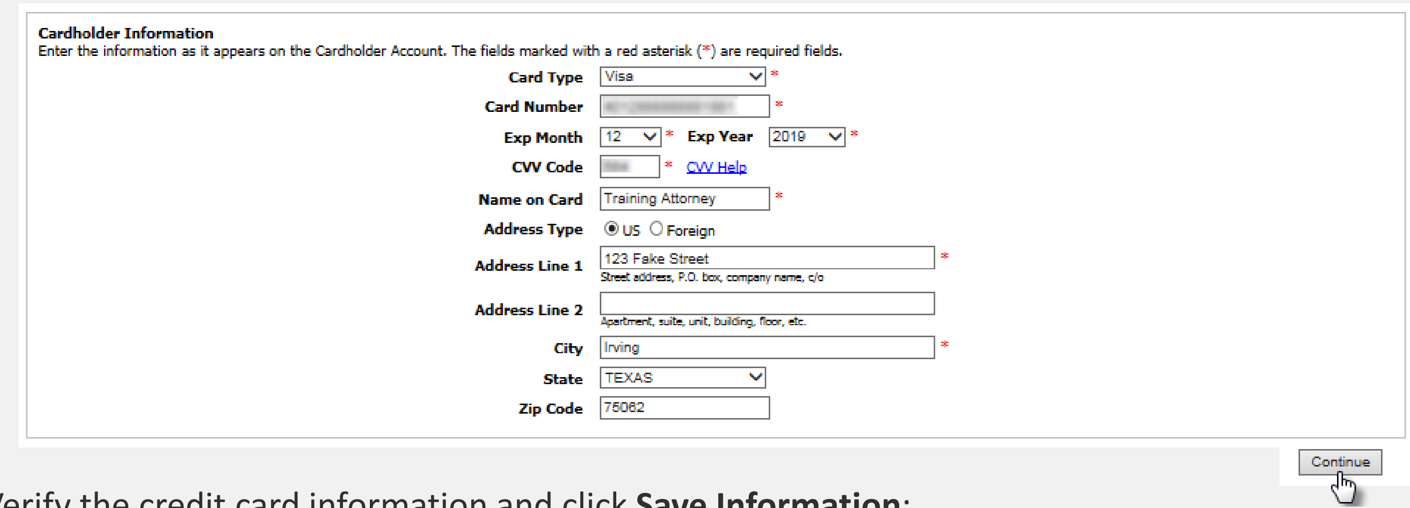


3. Enter the payment account name, choose the account type, credit card, and click **Submit**.
4. You will be redirected to a new page to complete the process.
5. Choose the Method of Payment:



Payment Accounts Tab *(continued)*

6. Enter the credit card information and click **Continue**:

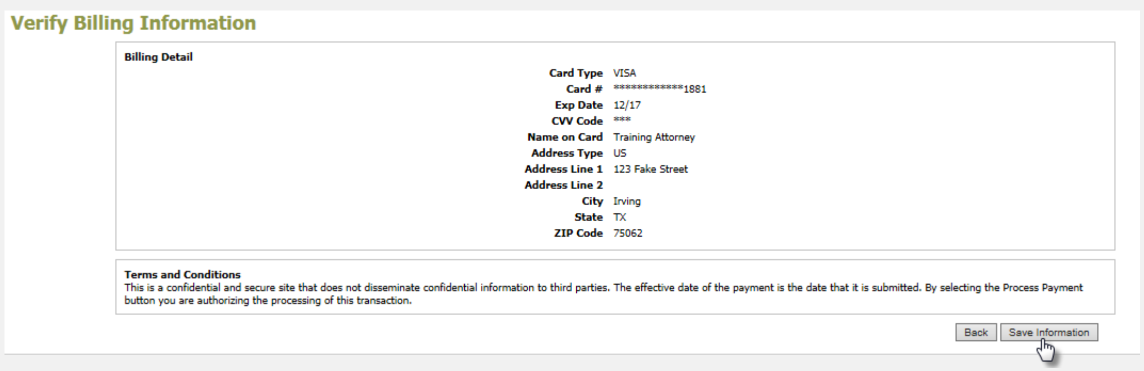


Cardholder Information
Enter the information as it appears on the Cardholder Account. The fields marked with a red asterisk (*) are required fields.

Card Type	Visa *
Card Number	*
Exp Month	12 * Exp Year 2019 *
CVV Code	* CVV Help
Name on Card	Training Attorney *
Address Type	US Foreign
Address Line 1	123 Fake Street * Street address, P.O. box, company name, c/o
Address Line 2	Apartment, suite, unit, building, floor, etc.
City	Irving *
State	TEXAS
Zip Code	75062

Continue

7. Verify the credit card information and click **Save Information**:



Verify Billing Information

Billing Detail

Card Type	VISA
Card #	************1881
Exp Date	12/17
CVV Code	***
Name on Card	Training Attorney
Address Type	US
Address Line 1	123 Fake Street
Address Line 2	
City	Irving
State	TX
ZIP Code	75062

Terms and Conditions
This is a confidential and secure site that does not disseminate confidential information to third parties. The effective date of the payment is the date that it is submitted. By selecting the Process Payment button you are authorizing the processing of this transaction.

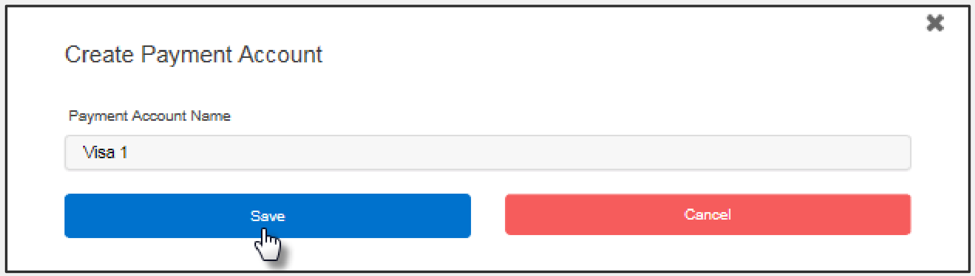
Back Save Information

Payment Accounts Tab *(continued)*

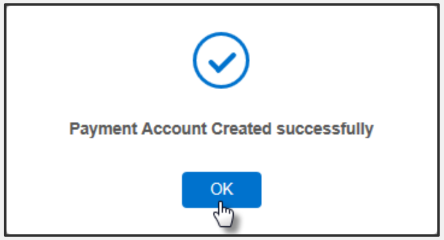
9. The following message will appear:

> Please do not click the Back button or refresh the page. This page will automatically proceed once payment processing has completed.

10. When processing is complete, you will be directed back to File & Serve Texas to save the account:



11. Click **OK** and the account will appear in your accounts list:

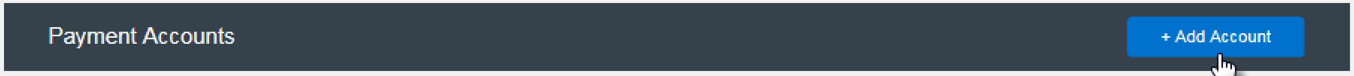


Payment Account Name	Payment Account Type	Actions
Visa 1	Credit Card	

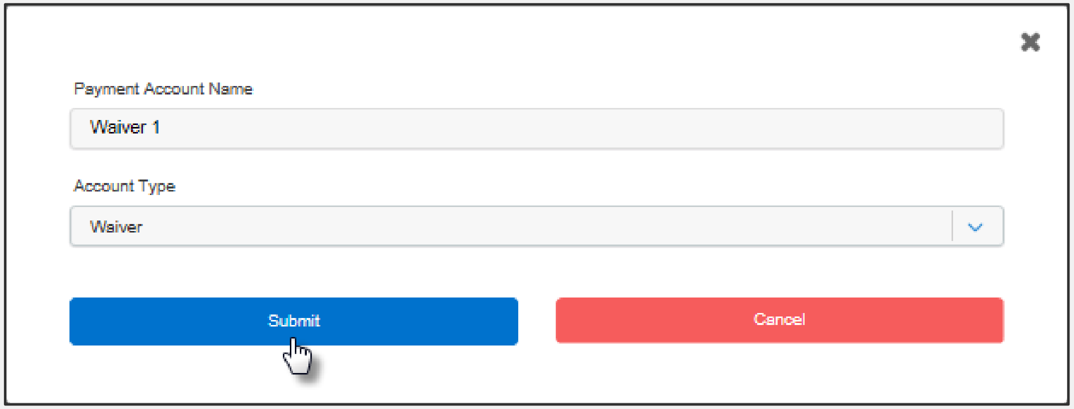
Payment Accounts Tab *(continued)*

To **Add** a waiver account, follow these steps:

1. Click on the **Add Account** button:



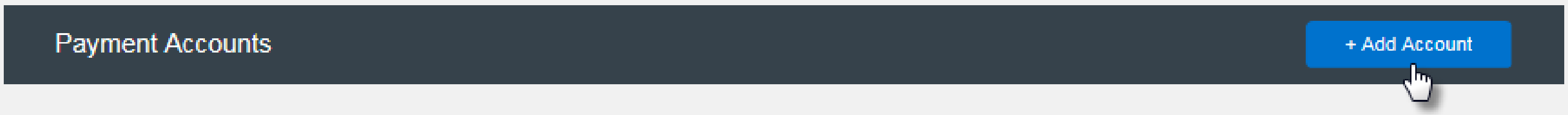
2. This will open a new screen:

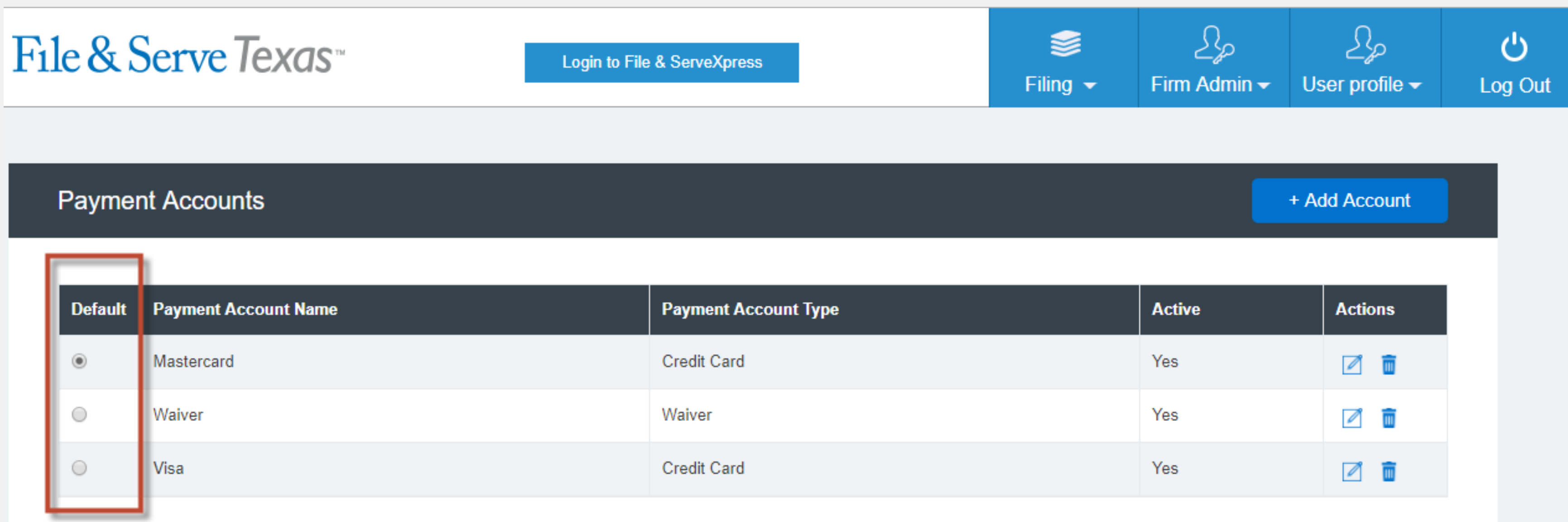


3. Enter the payment account name, choose the account type, Waiver, and click **Submit**.
4. Click **OK** and the account will appear in your accounts list:

Payment Accounts Tab *(continued)*

To select a default payment account, select the radio button of the account you would like to default to:



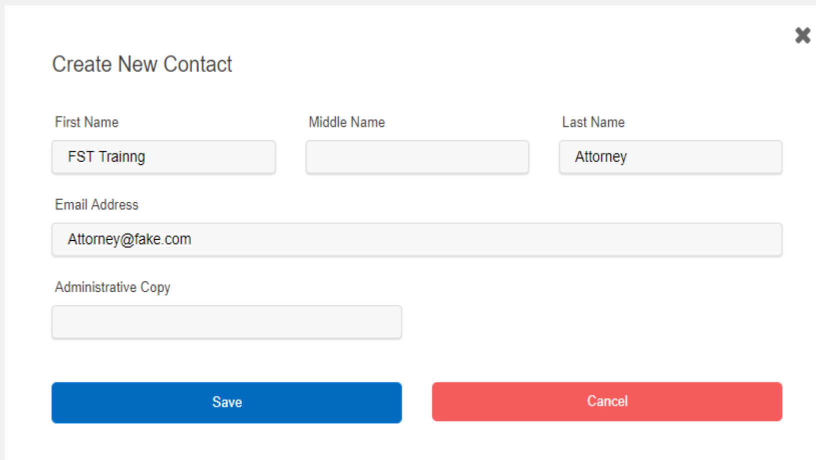


How to Add, Update, or Remove Service Contacts (Service Contacts Tab)

To **Add** a service contact, follow these steps:

1. Click on the **Add New Service Contact** button: 

2. This will open a new screen:



3. Enter the service contact's information.
4. If anyone in your firm needs to be copied on the service contact's service, enter one or more email addresses separated by commas (no space) in the **Administrative Copy** field.
5. Click **Save** to add the contact to your list.

First Name	Last Name	Email Address	Action
FST Trainng	Attorney	Attorney@fake.com	

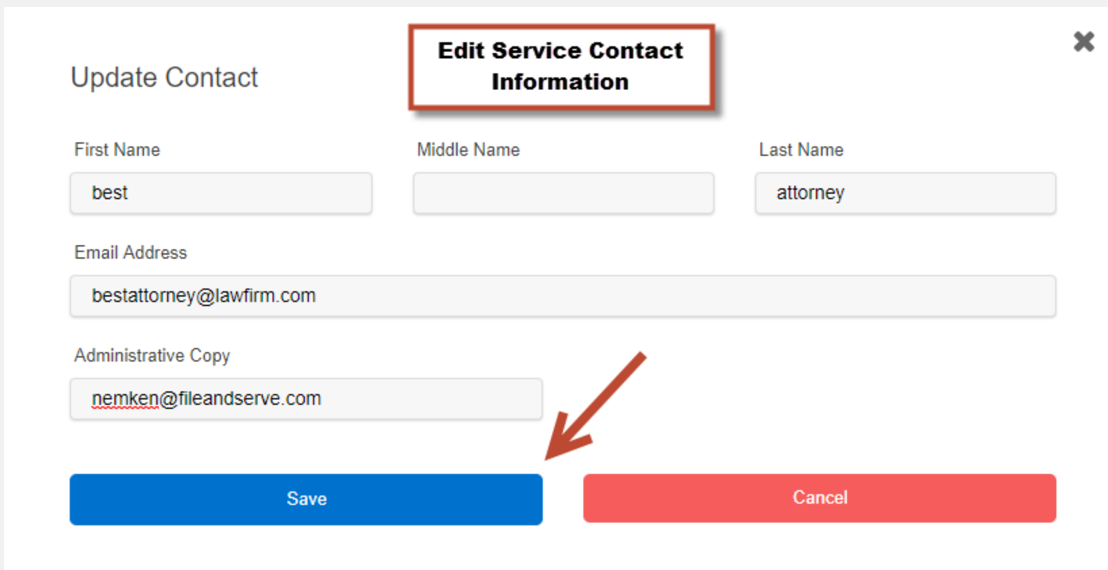
How to Add, Update, or Remove Service Contacts (Service Contacts Tab)

To **Update** an Service Contact, follow these steps:

6. Click on the "**Pencil Icon**" button:

First Name	Last Name	Email Address	Action
best	attorney	bestattorney@lawfirm.com	

7. This will open a new screen:



How to Add, Update, or Remove Service Contacts (Service Contacts Tab)

To **Remove** a Service Contact , follow these steps:

8. Click on the **Trash Can** button:

First Name	Last Name	Email Address	Action
best	attorney	bestattorney@lawfirm.com	

How to Search for Service Contacts (Service Contacts Tab)

To **Search** for a Service follow these steps:

Users have the ability to search for a **Service Contact** by first name, last name or email.

1. Enter any/all of the users information and click **Search**:
2. This will populate the screen with the user(s) that match your search criteria.
3. Results will be sorted alphabetically by last name, first name.