

File & Serve *Illinois*™

USER GUIDE

Firm Administrator



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AGENDA



- File & Serve Illinois has many resources available to you in order to address your questions and concerns:
- **File & Serve Illinois 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 Illinois Training & Resource Center** contains helpful information for using the File & Serve Illinois system. The File & Serve Illinois Training & Resource Center houses our training registration information, user guides, pricing, and more. Click [here](#) to access.
- **File & Serve Illinois Login Page** is where you can find password help, a link to the registration page, and links for help and contact information.

FILE & SERVE ILLINOIS

FIRM ADMINISTRATOR OVERVIEW

This File & Serve Illinois 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

Attorneys
Firm Users
Firm Information
Payment Accounts
Service Contacts
Invoice Report

1. Refer to the appropriate court rules on electronic filing prior to using File & Serve Illinois to ensure that you are in compliance with local requirements.
2. Check our minimum system requirements to be sure your computer is correctly configured for using File & Serve Illinois.
3. If you need assistance, call our Client Support line at 1-888-529-7587.

Logging in to File & Serve Illinois

Username

Password

Login

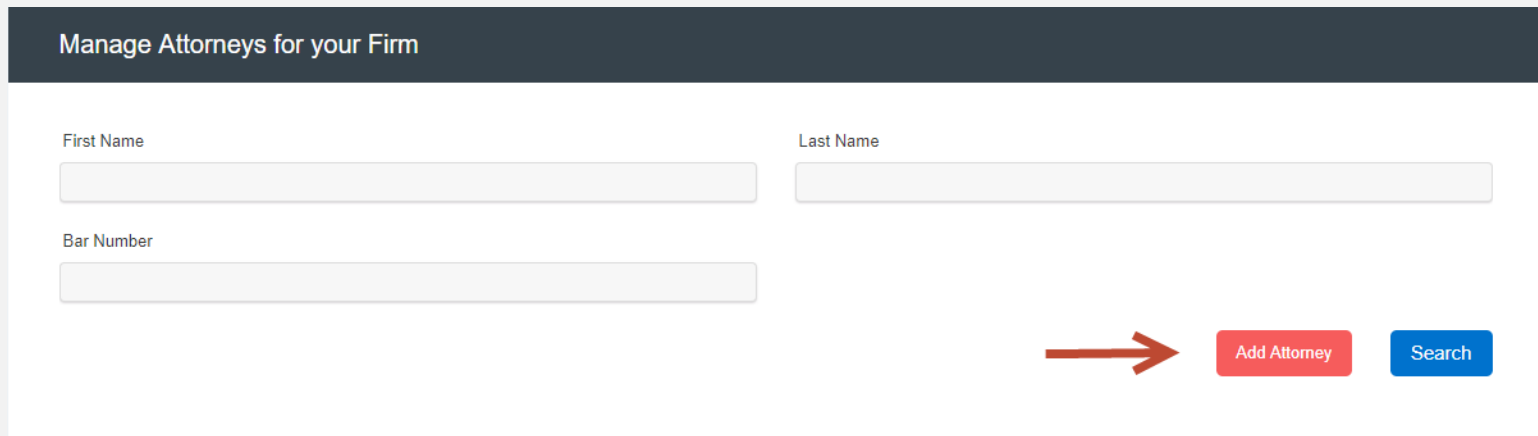
[Forgot password ?](#) | [Register with E-mail](#)

1. Before using File & Serve Illinois, you must have an ID and Password. If you do not have these, click the *Register with email* 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**.

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.




Manage Attorneys for your Firm

First Name

Last Name

Bar Number

 [Add Attorney](#) [Search](#)



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

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

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

The screenshot shows a 'Create New Attorney' dialog box with the following fields and buttons:

- First Name:** Input field containing 'John'. A red arrow points to this field.
- Middle Name:** Empty input field.
- Last Name:** Input field containing 'Attorney'. A red arrow points to this field.
- Bar Number:** Input field containing '123456'. A red arrow points to this field.
- Buttons:** A blue 'Save' button and a red 'Cancel' button. A red arrow points to the 'Save' button.


First Name	Last Name	Bar Number	Actions
John	Attorney	123456	 

The Attorney will be added to the list.

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
John	Attorney	123456	 

5. This will open a new screen:

Update Attorney ✕

Edit Attorney Information

First Name

Middle Name




Last Name

Bar Number

How to Add, Update, Remove, or Print/Export Firm Attorneys (*Attorneys Tab*)

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

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

First Name	Last Name	Bar Number	Actions
John	Attorney	123456	  

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.

The screenshot displays the 'Firm Admin' section of a web application. At the top left, there are two tabs: 'Filing' and 'Firm Admin'. Below the 'Firm Admin' tab, a dropdown menu is open, listing several options: 'Attorneys', 'Firm Users', 'Firm Information', 'Payment Accounts', 'Service Contacts', and 'Invoice Report'. A red arrow points to the 'Attorneys' option. The background shows a form with various fields, including 'Case Type', 'Jurisdiction', 'Case Category', 'Payment Account', 'Attorney', and 'Client Matter ID'. A 'Next' button is visible at the bottom right of the form area.

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.

Manage Attorneys for your Firm

First Name Last Name

Bar Number

First Name	Last Name	Bar Number	Actions
John	Attorney	123456	

Print/Export Firm Attorneys (Attorneys Tab)

1. To **Print** or **Export** a list of Firm Attorneys, follow the steps.
2. Select Attorneys on your Firm Admin drop-down box.
3. The Firm attorneys will appear. Select your option of **Print** or **Export**.

Note: **Export** will download an excel spreadsheet with all **Firm Attorneys** for the Firm. First Name, Last Name, email address, role, and status. **Print** will open the browser's print dialog window to allow the user to print the list of **Firm Attorneys** within in the Firm.

The screenshot shows the 'Firm Admin' interface. The 'Attorneys' tab is selected in the navigation menu, indicated by a red arrow. Below the navigation menu, there is a search bar with the text 'Last Name' and a search button. To the right of the search bar is an 'Add Attorney' button. Below the search bar is a table of firm attorneys. The table has the following data:

First Name	Last Name	Bar Number	Actions
John	Attorney	123456	
Attorney	Last Name	123456	
Lucy	Lawyer	123789	
Justin	Payne	678901	
Max	Powers	1576	
Max	Powers II	123456	

At the bottom right of the page, there are two buttons: 'Print' and 'Export', with a red arrow pointing to them.

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.


Manage Users For Your Firm

First Name

Last Name

Email Address

Role



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

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

Create New User

First Name
Support

Middle Name

Last Name
Staff

Email Address
supportstaff@lawfirm.com

Roles
 Firm Admin Filer

Select whether Firm Admin, Filer, or both.

Save Cancel

Support	Staff	supportstaff@lawfirm.com	Filer	Unverified		Resend Verification
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When added to the Firm, the Firm User will receive an activation email from no-reply@efileillinois.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
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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:

Support	Staff	supportstaff@lawfirm.com	File	Active	  	Reset Password
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How to Search for Firm Users


(Firm Users Tab)

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.

Manage Users For Your Firm

First Name: 

Last Name:

Email Address:

Role: 

First Name	Last Name	Email Address	Role	Status	Action	
integratedcft	+1101d	integratedcft+1101d@gmail.com	Filer	Active		<input type="button" value="Reset Password"/>
integratedcft	1101a	integratedcft+1101a@gmail.com	Filer	Unverified		<input type="button" value="Resend Verification"/>

Print/Export Firm Users

(Firm Users Tab)

4. To **Print** or **Export** a list of **Firm Users**, follow the steps.
5. Select **Firm Users** on your Firm Admin drop-down box.
6. The **Firm Users** will appear. Select your option of **Print** or **Export**.

Note: **Export** will download an excel spreadsheet with all **Firm Users** for the Firm. First Name, Last Name, email address, role, and status. **Print** will open the browser's print dialog window to allow the user to print the list of **Firm Users** within in the Firm.

The screenshot shows the 'Firm Admin' interface. A dropdown menu is open under the 'Firm Admin' tab, with 'Firm Users' selected. Below the menu is a search bar with the text 'Last Name' and an 'Add Attorney' button. A table of firm users is displayed below the search bar. The table has columns for First Name, Last Name, Bar Number, and Actions. The actions column contains icons for edit and delete. At the bottom right, there are 'Print' and 'Export' buttons. A red arrow points to the 'Print' button.

First Name	Last Name	Bar Number	Actions
John	Attorney	123456	
Attorney	Last Name	123456	
Lucy	Lawyer	123789	
Justin	Payne	678901	
Max	Powers	1576	
Max	Powers II	123456	

Firm Information Tab

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

Firm Information

Firm Name
Mock Firm A- Irving

Country
United States

Address Line1
500 E. John Carpenter Fwy

Address Line2

City
Irving

State
Texas

Zipcode
75062

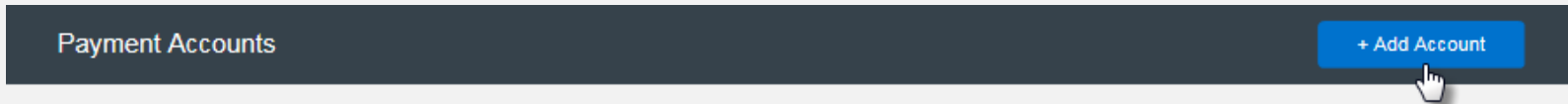
Phone Number
(555) 555-5555

Cancel Save

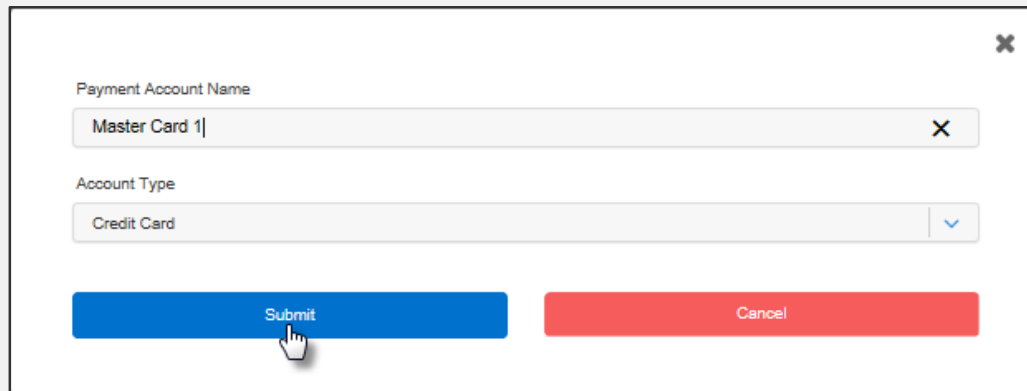
Payment Accounts Tab

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:

A white modal form with a close button (X) in the top right corner. It contains two input fields: 'Payment Account Name' with the text 'Master Card 1' and a clear button (X); and 'Account Type' with a dropdown menu showing 'Credit Card' and a downward arrow. At the bottom, there are two buttons: a blue 'Submit' button and a red 'Cancel' button. A white mouse cursor is pointing at the 'Submit' button.

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:

A white box with a thin black border. At the top left, the text 'Payment Information' is displayed in green. Below it, there is a section titled 'Method of Payment' with two radio button options: 'Credit Card' (which is selected) and 'e-Check'.

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 75082

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

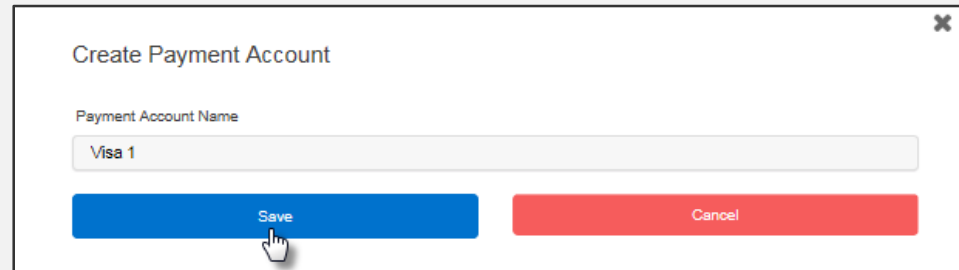
Terms and Conditions
This is a confidential and secure site that does not disseminate confidential information to third parties. The effective date of the payment is the date that it is submitted. By selecting the Process Payment button you are authorizing the processing of this transaction.

Payment Accounts Tab *(continued)*

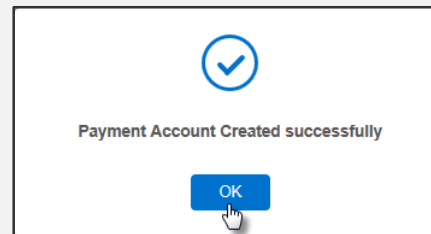
9. The following message will appear:



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 Illinois 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	 

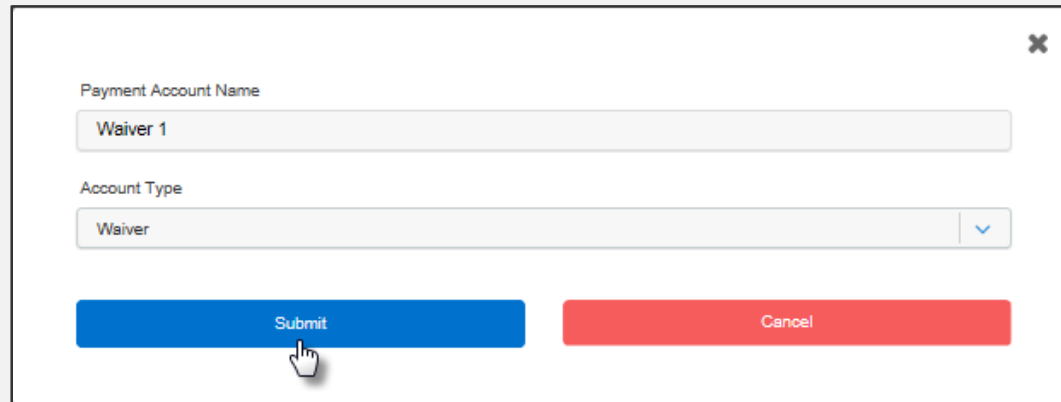
Payment Accounts Tab *(continued)*

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

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

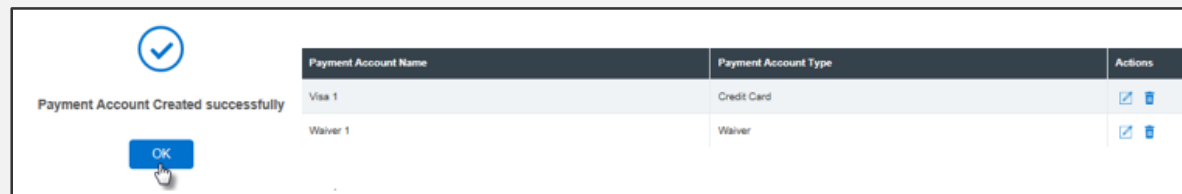


2. This will open a new screen:



A white modal form with a close button (X) in the top right corner. It contains two input fields: "Payment Account Name" with the text "Waiver 1" and "Account Type" with a dropdown menu showing "Waiver". At the bottom, there are two buttons: a blue "Submit" button and a red "Cancel" button. A mouse cursor is pointing at the "Submit" button.





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.

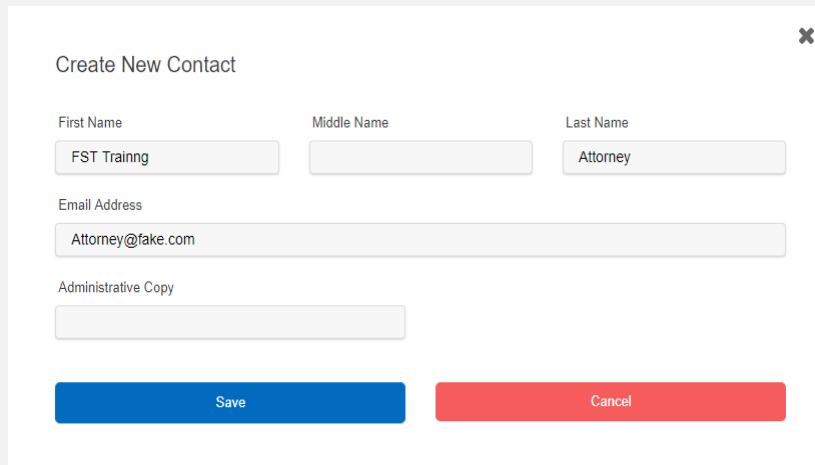
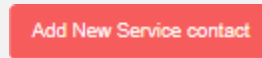
Payment Accounts + Add Account

Default	Payment Account Name	Payment Account Type	Actions
<input checked="" type="radio"/>	Training Account	Credit Card	 
<input type="radio"/>	Waiver	Waiver	 



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:

A screenshot of a "Create New Contact" form. The form has a title "Create New Contact" and a close button (X) in the top right corner. It contains several input fields: "First Name" (with "FST Trainng"), "Middle Name" (empty), "Last Name" (with "Attorney"), "Email Address" (with "Attorney@fake.com"), and "Administrative Copy" (empty). At the bottom, there are two buttons: a blue "Save" button and a red "Cancel" button.



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:

Edit Service Contact Information ✕

Update Contact

First Name: Middle Name: Last Name:




Email Address:

Administrative Copy:

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 Contact 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.

Service Contact

First Name

Last Name

Email Address

First Name	Last Name	Email Address	Action
best	attorney	bestattorney@lawfirm.com	<input type="checkbox"/> <input type="checkbox"/>
best	attorney	fake@fakelaw.com	<input type="checkbox"/> <input type="checkbox"/>
better	attorney	betteratty@firm.com	<input type="checkbox"/> <input type="checkbox"/>
out	attorney	outofstate@lawfirm.com	<input type="checkbox"/> <input type="checkbox"/>
poor	attorney	pooratty@lawfirm.com	<input type="checkbox"/> <input type="checkbox"/>

Print/Export Firm Service Contacts (Service Contacts Tab)

4. To **Print** or **Export** a list of **Firm Service Contacts** follow the steps.
5. Select **Firm Service Contacts** on your Firm Admin drop-down box.
6. The **Firm Service Contacts** will appear. Select your option of **Print** or **Export**.

Note: **Export** will download an excel spreadsheet with all **Firm Service Contacts** for the Firm. First Name, Last Name, email address, role, and status. **Print** will open the browser's print dialog window to allow the user to print the list of **Firm Service Contacts** within in the Firm.

The screenshot shows the 'Firm Admin' interface. A navigation menu on the left has 'Service Contacts' highlighted with a red arrow. Below the menu is a search bar with a 'Last Name' label and a 'Search' button. To the right of the search bar is a red 'Add New Service contact' button. Below the search bar is a table of service contacts with columns for First Name, Last Name, Email Address, and Action. At the bottom right, there are 'Print' and 'Export' buttons, with a red arrow pointing to them.

First Name	Last Name	Email Address	Action
Isla	A	ia@fake.com	✎ 🗑
Bria	Ann	ann@fake.com	✎ 🗑
Bri	Anna	bria@fake.com	✎ 🗑
Add	Attorney	addattorney@fake.com	✎ 🗑
Firm	Attorney	firmatty@fake.com	✎ 🗑
Janey	Attorney	janey@fake.com	✎ 🗑

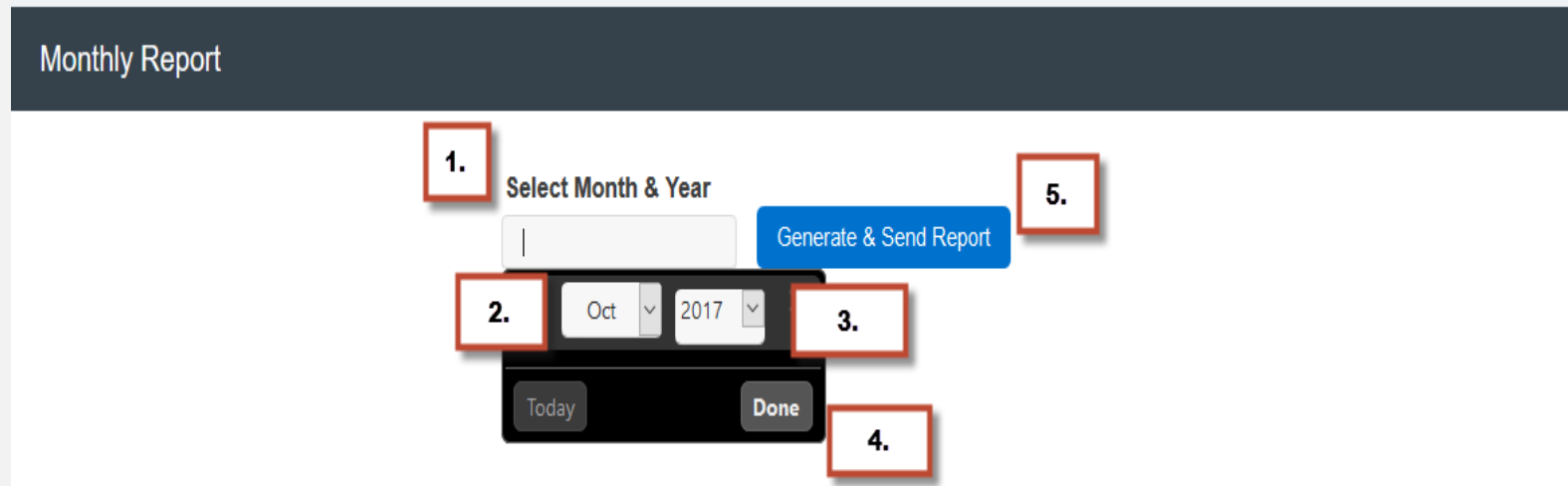
How to Create Monthly Invoice Report

1. Under the Firm Admin drop-down menu, click on **Invoice Report**.

The screenshot displays the top navigation bar of the File & Serve Illinois application. On the left, there are two icons: a briefcase labeled 'Filing' and a person icon labeled 'Firm Admin'. The 'Firm Admin' dropdown menu is open, showing a list of options: Attorneys, Firm Users, Firm Information, Payment Accounts, Service Contacts, and Invoice Report. A red arrow points to the 'Invoice Report' option. To the right of the dropdown, there is a dark blue header bar with a '+ New Filing' button. Below the header, there are several form fields: a 'Jurisdiction' dropdown menu with 'Select' as the current value, a 'To Date (mm/dd/yyyy)' text input field, and a 'Go' button at the bottom right.

How to Create Monthly Invoice Report (continued)

2. After selecting **Invoice Report**, a new screen will appear.
3. Click on the **Select Month & Year** field to open the ability to select the desired **Month/Year**.
4. Follow the next steps listed in the screenshot below on the next slide.
5. The report will be sent to the email address you use to log into File & Serve Illinois. Please see next slide for further screenshots.



How to Create Monthly Invoice Report (continued)

The screenshot shows a web interface for generating a monthly report. At the top left, there is a dark header with the text 'Monthly Report'. Below this, the main area has a light gray background. On the left, there is a label 'Select Month & Year' above a dropdown menu showing '09/2017'. To the right of the dropdown is a blue button labeled 'Generate & Send Report'. A white dialog box with a gray border is centered on the screen, containing the text 'Successfully generated and sent report.' and an 'OK' button. To the right of the dialog box, there is a white box with a red border containing the following instructions:

- 6. Click "Ok".**
- 7. The report will be sent to the email address you use to log into File & Serve Texas.**