File & Serve *Illinois*™

USER GUIDE
Firm Administrator

AGENDA

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FILE & SERVE ILLINOIS RESOURCES

File & Serve Illinois

- File & Serve Illinois has many resources available to you in order to address your questions and concerns:

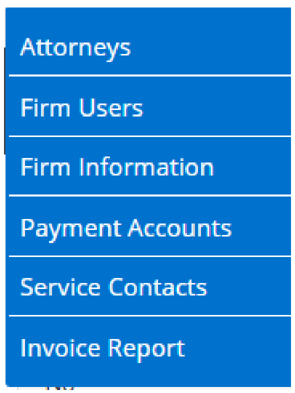
- **File & Serve Illinois Client Support** is available to assist you with technical, ID, functionality and any other questions you may have. You can contact Client Support at 888.529.7587.

- **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

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 configures for using File & Serve Illinois.

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

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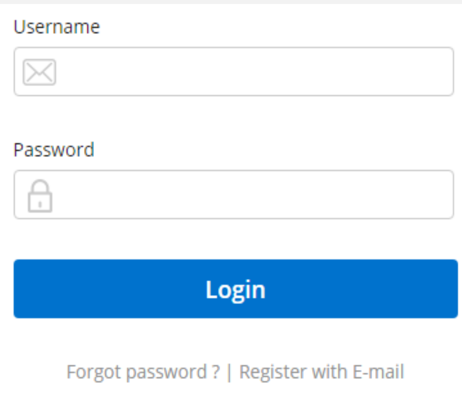
Logging in to File & Serve *Illinois*



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)*

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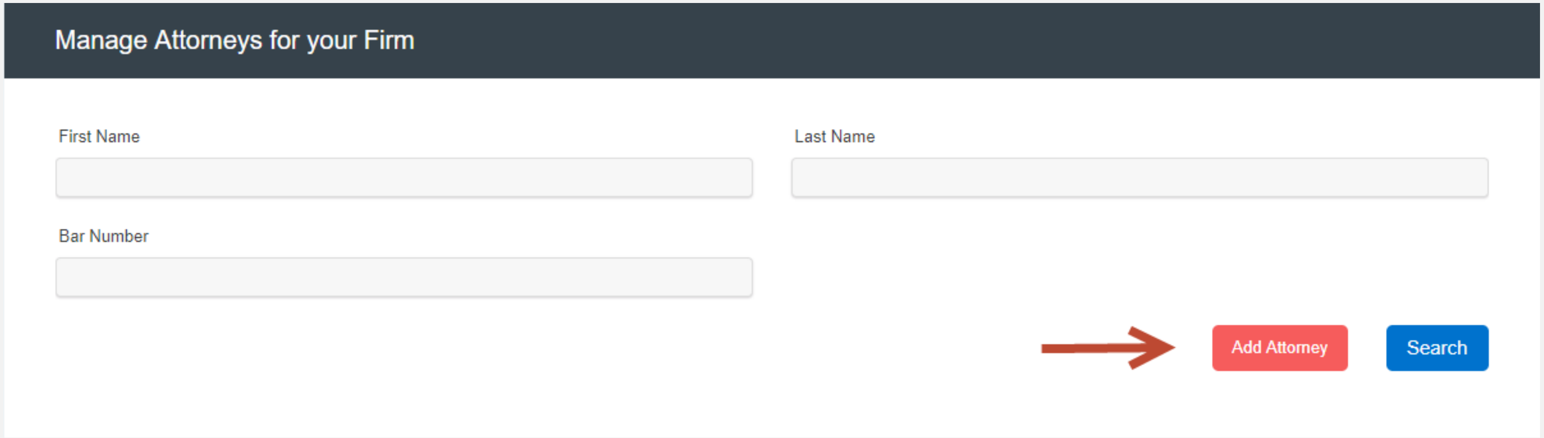
To **ADD** an Attorney, follow these steps:

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.



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

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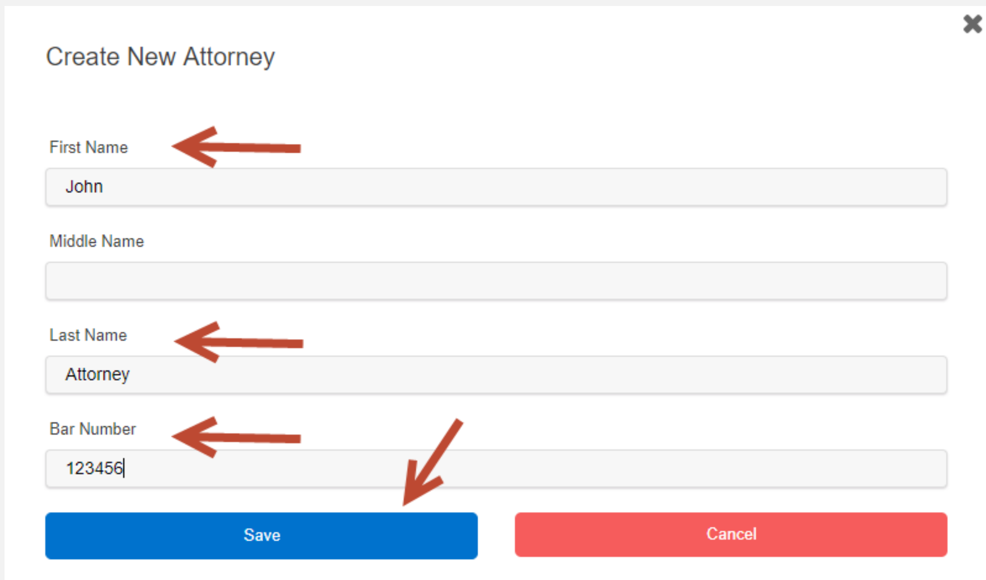
To **ADD** an Attorney, follow these steps:

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



First Name	Last Name	Bar Number	Actions
John	Attorney	123456	

The Attorney will be added to the list.

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

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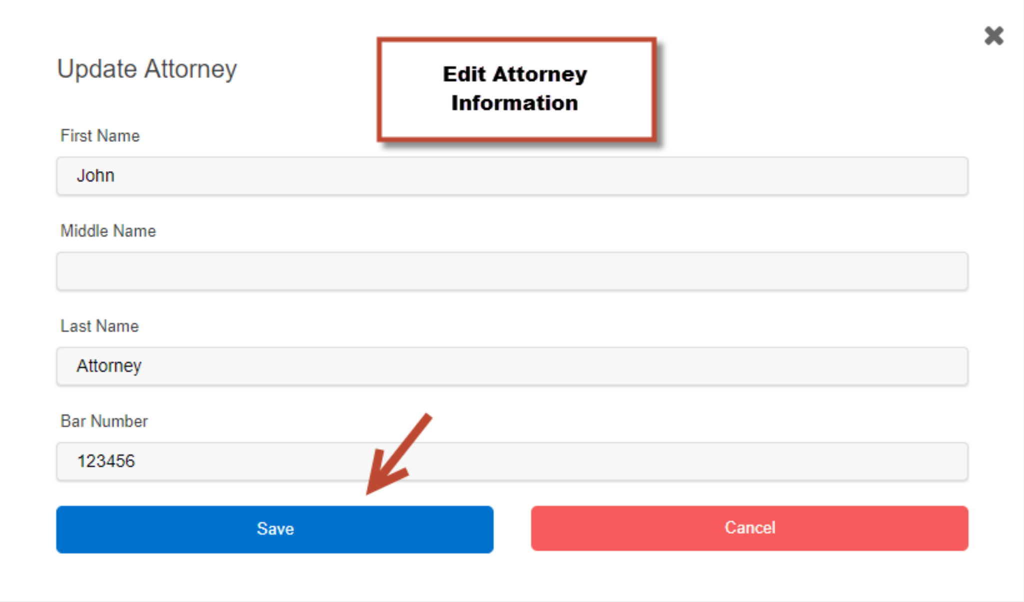
To **Update** an Attorney, follow these steps:

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

First Name	Last Name	Bar Number	Actions
John	Attorney	123456	

5. This will open a new screen:



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

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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)

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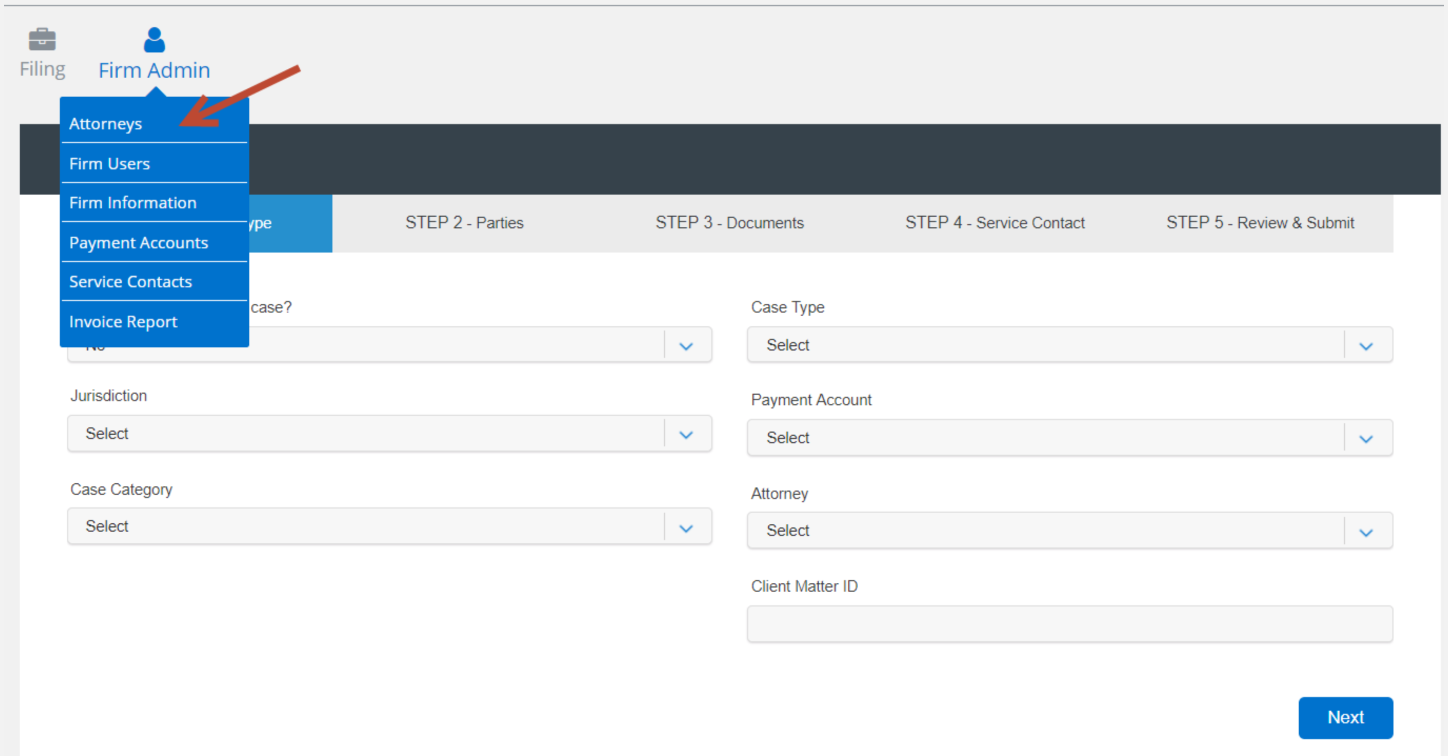
To **Search** for a Firm Attorney, if you need to update their name or they have left the firm, follow these steps:

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



How to Search for Firm Attorneys
(Attorneys Tab)

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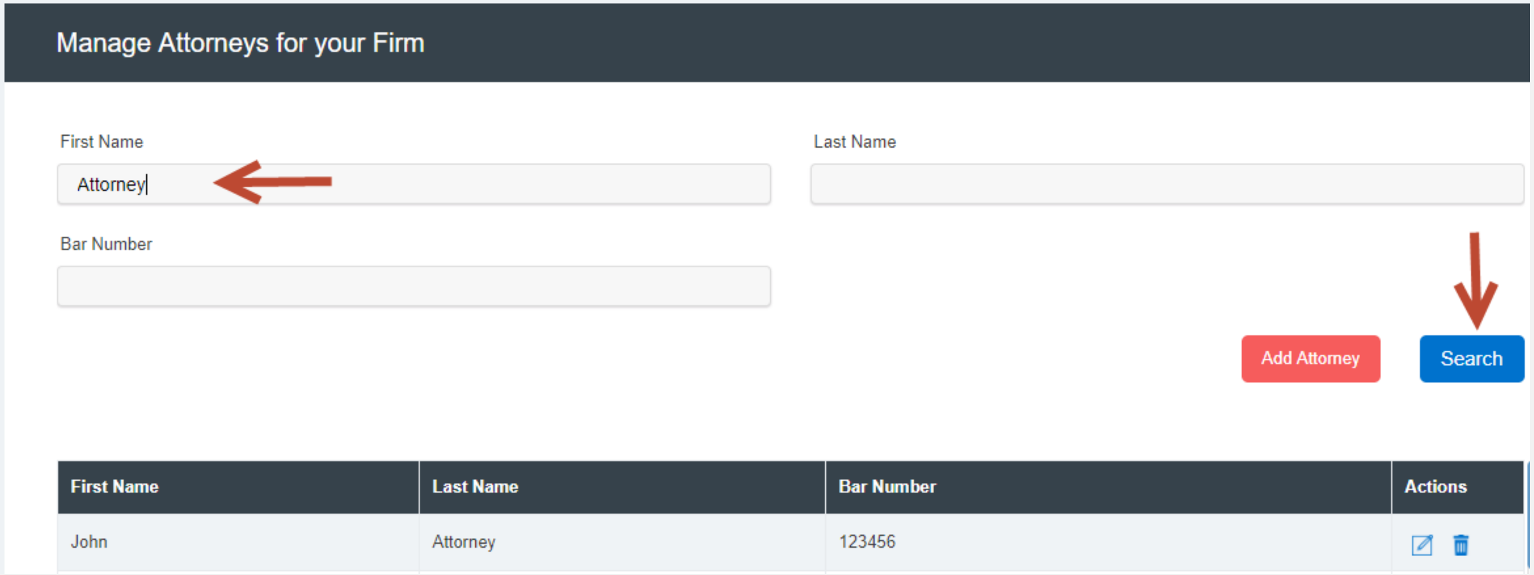
2. This will open a new screen. Enter First, last name, or bar number and click **Search**.

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.



Print/Export Firm Attorneys
(Attorneys Tab)

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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**.**

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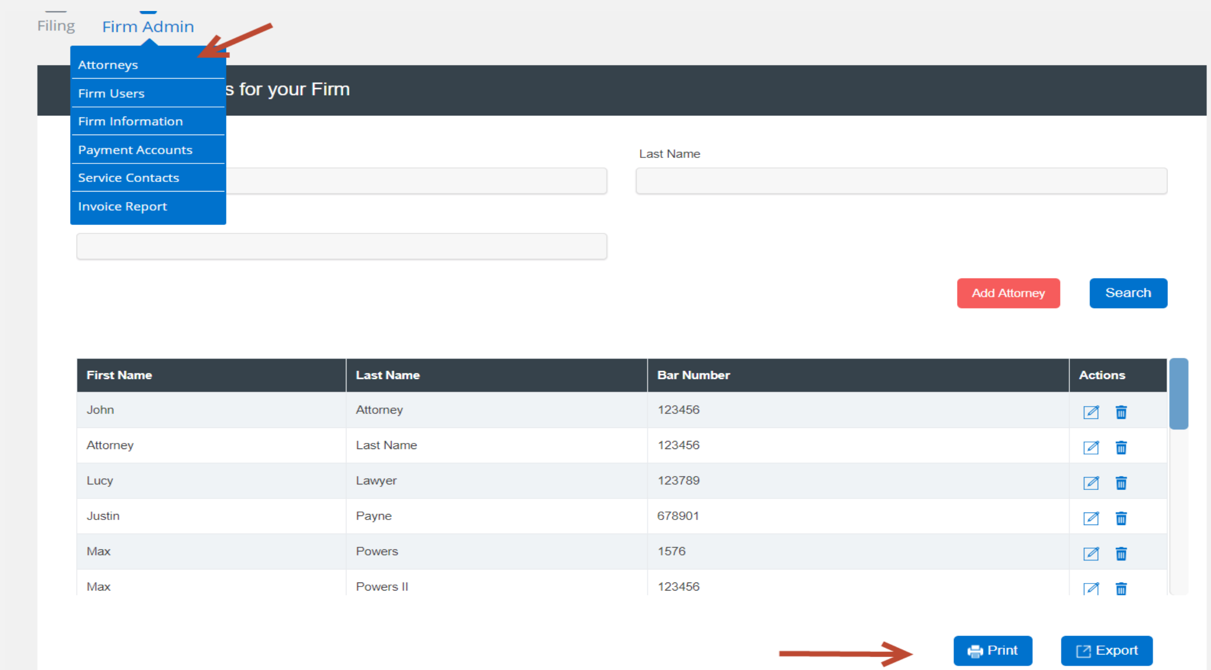
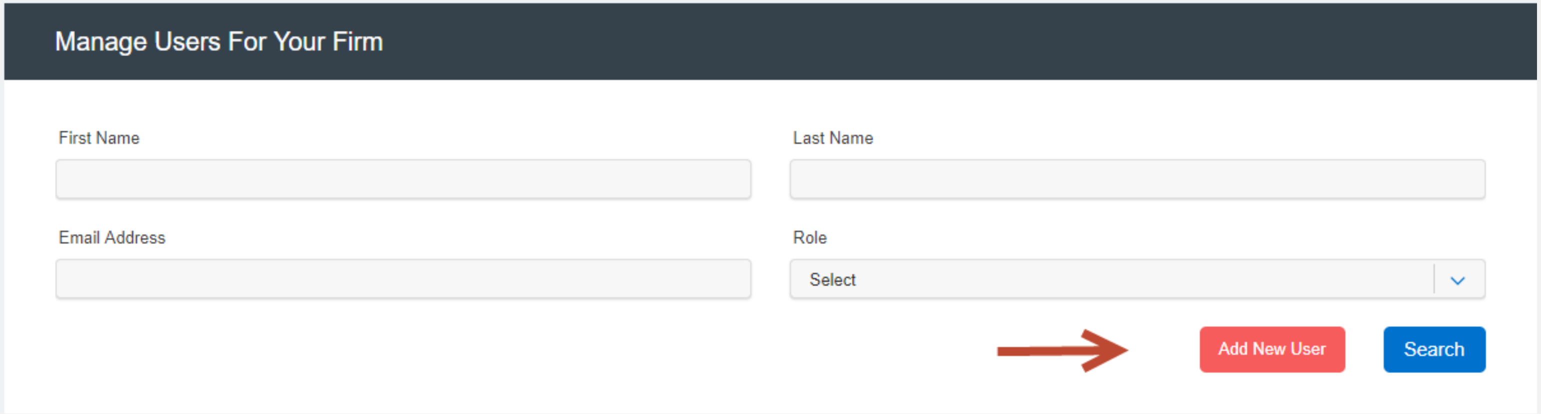


How to Add, Update, or Remove Firm Users *(Firm Users Tab)*

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)*

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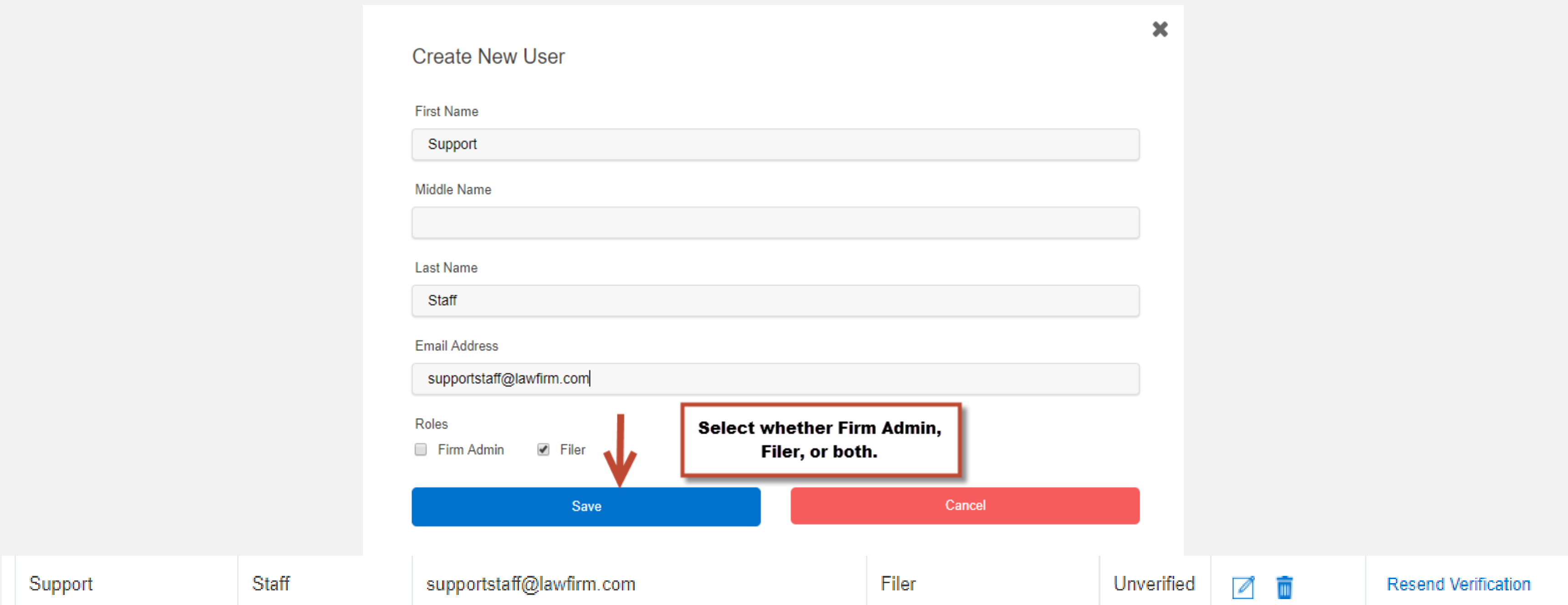
3. Enter the Firm User information and click **Save** to add them to the Firm Users list.



When added to the Firm, the Firm User will receive an activation email from no-reply@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)*

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

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

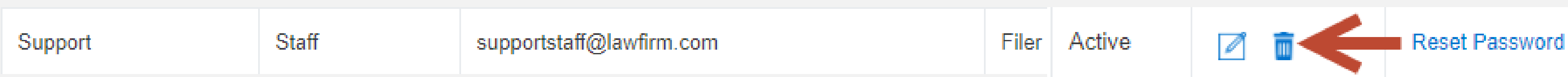
5. If the Firm Users have forgotten their password, you can **Reset Password**.

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)

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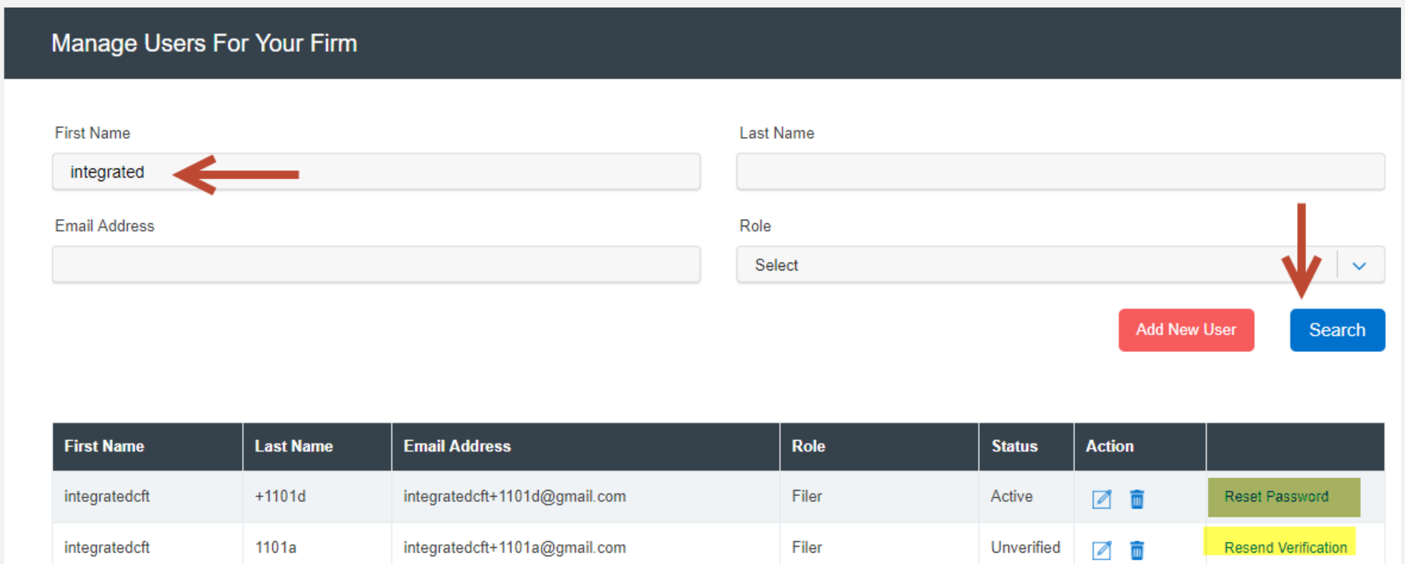
To **Search** for a Firm User if you need **to reset their password**, **resend verification**, or if they have

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.



Print/Export Firm Users
(Firm Users Tab)

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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**.**

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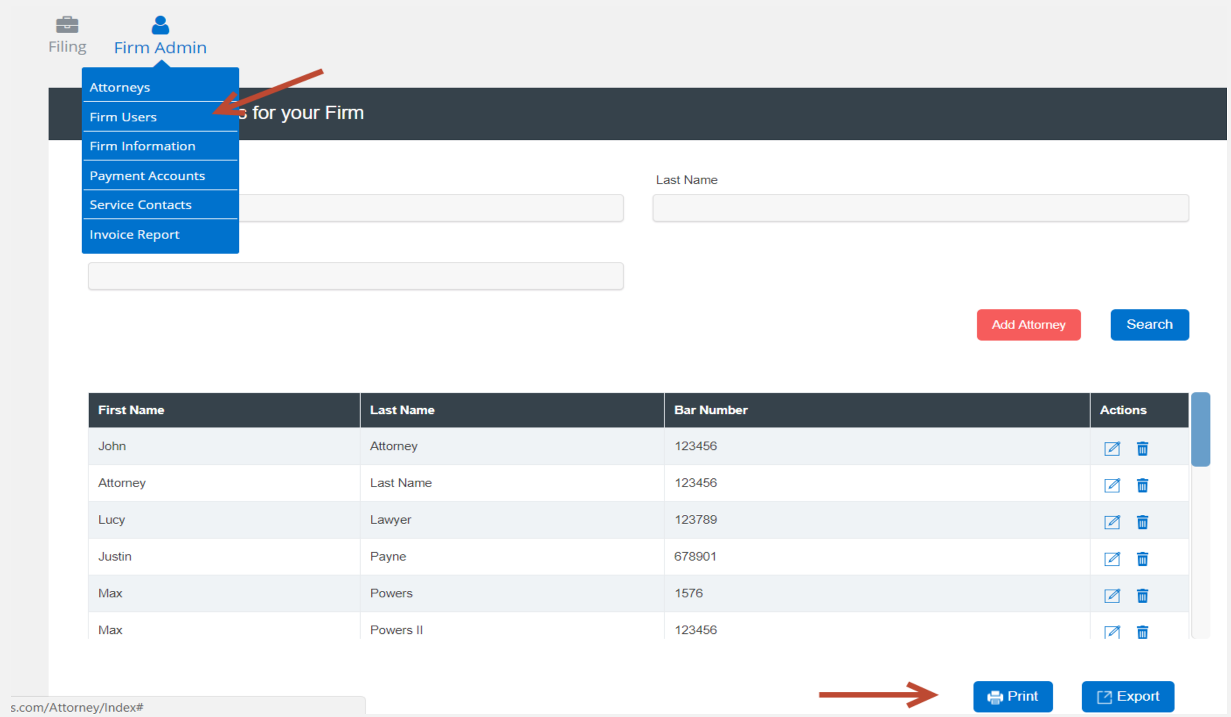

Firm Information Tab

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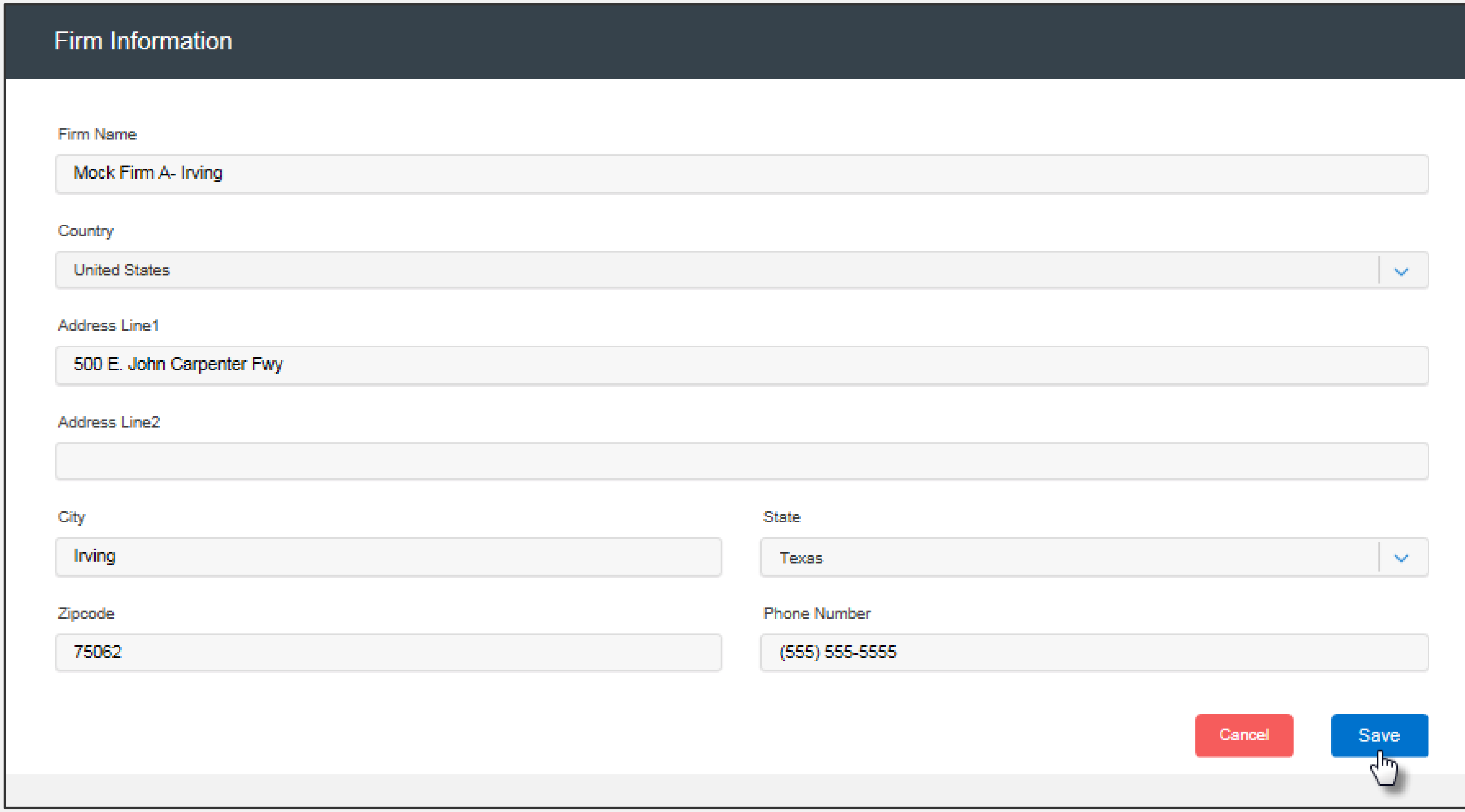
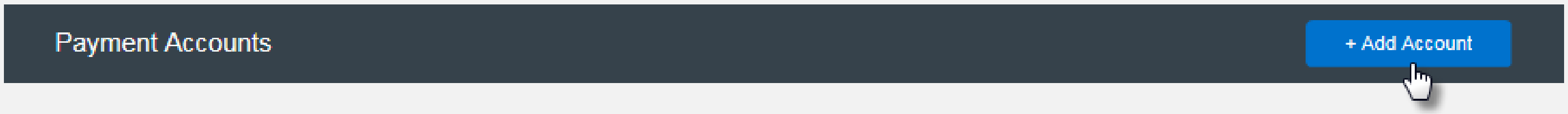
To **Update** any of your firm's information, make your changes in the fields provided and click **Save**:



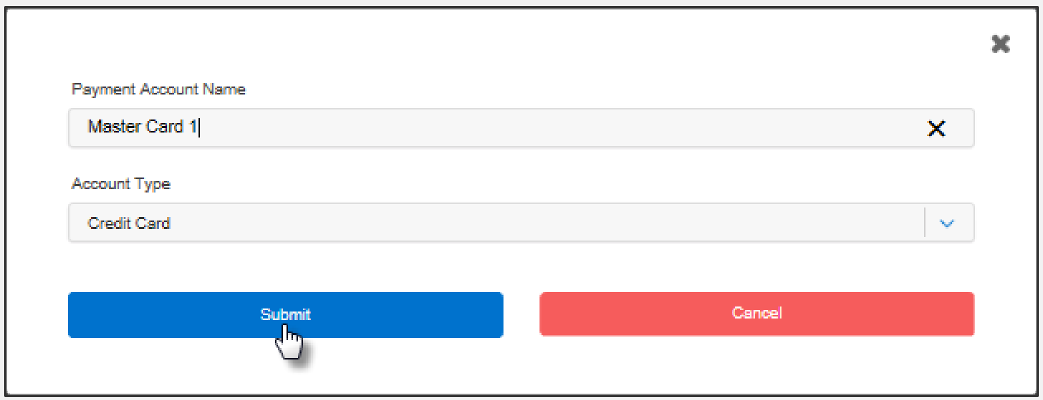
Payment Accounts Tab

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

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



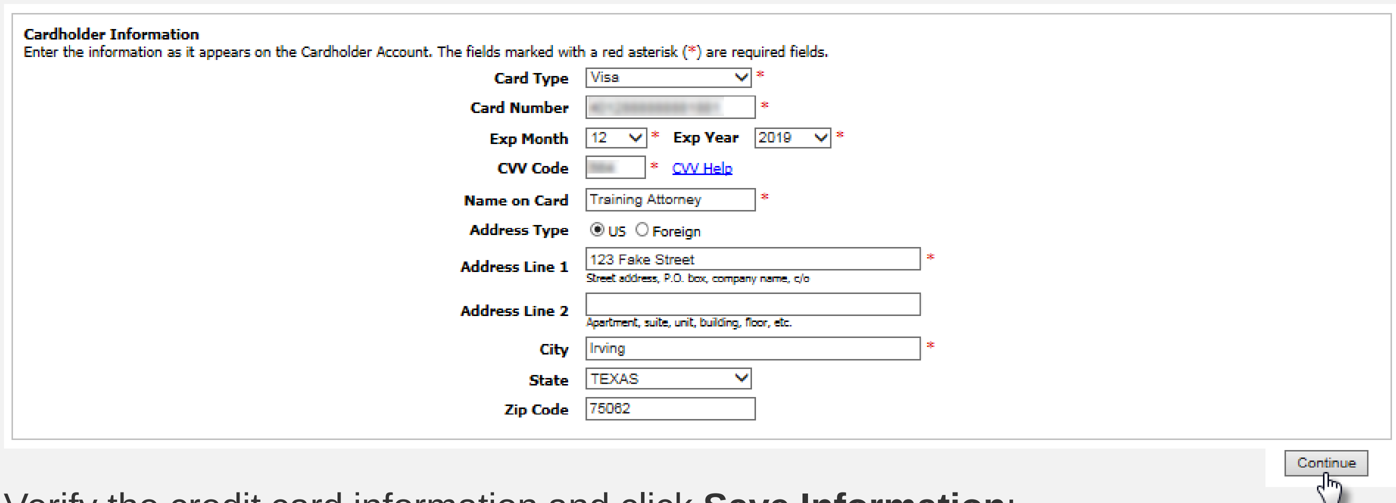
2. This will open a new screen:



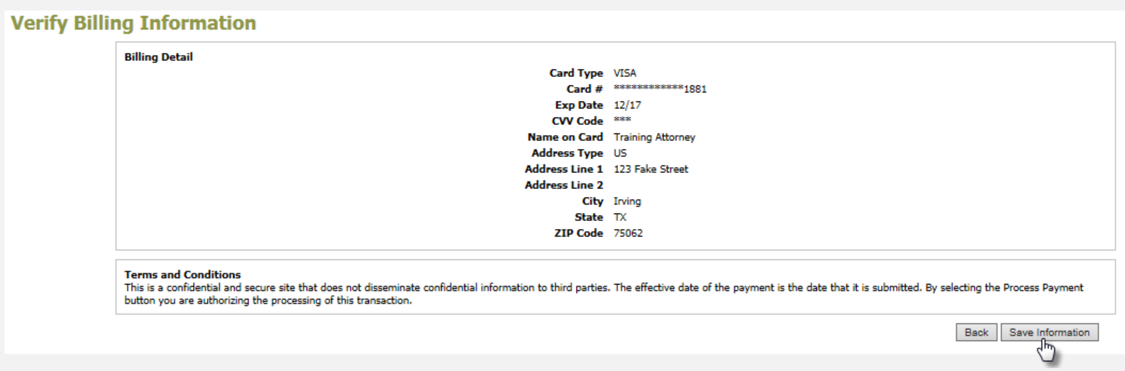
3. Enter the payment account name, choose the account type, credit card, and click **Submit**.
4. You will be redirected to a new page to complete the process.
5. Choose the Method of Payment:

Payment Accounts Tab *(continued)*

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



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



Payment Accounts Tab *(continued)*

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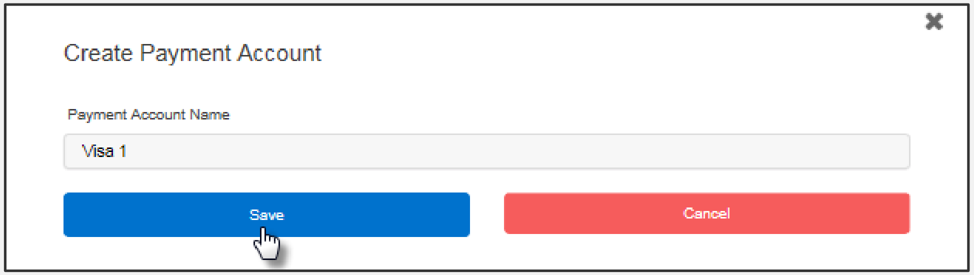
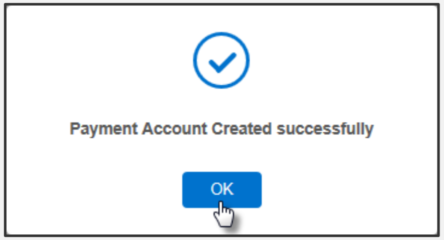
9. The following message will appear:

> 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:

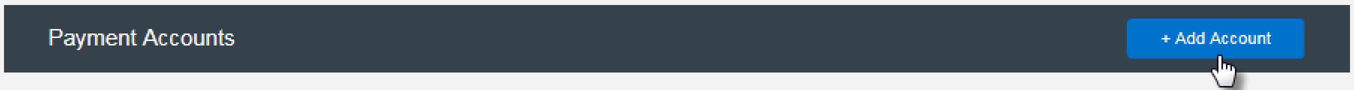


Payment Account Name	Payment Account Type	Actions
Visa 1	Credit Card	

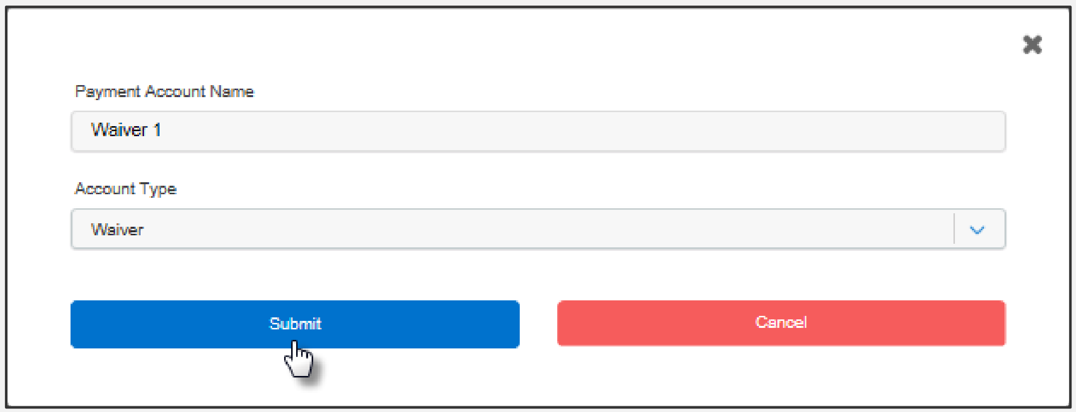
Payment Accounts Tab *(continued)*

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

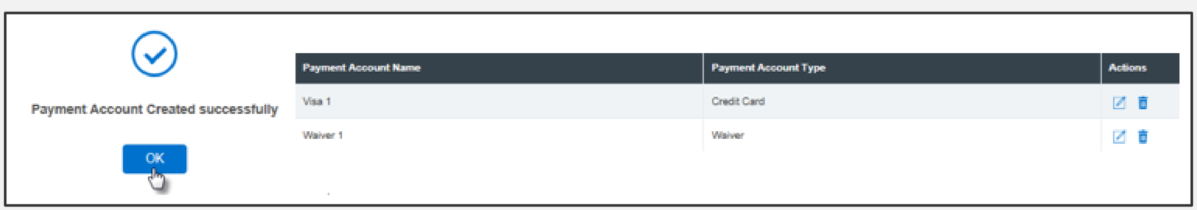
1. Click on the **Add Account** button:



2. This will open a new screen:

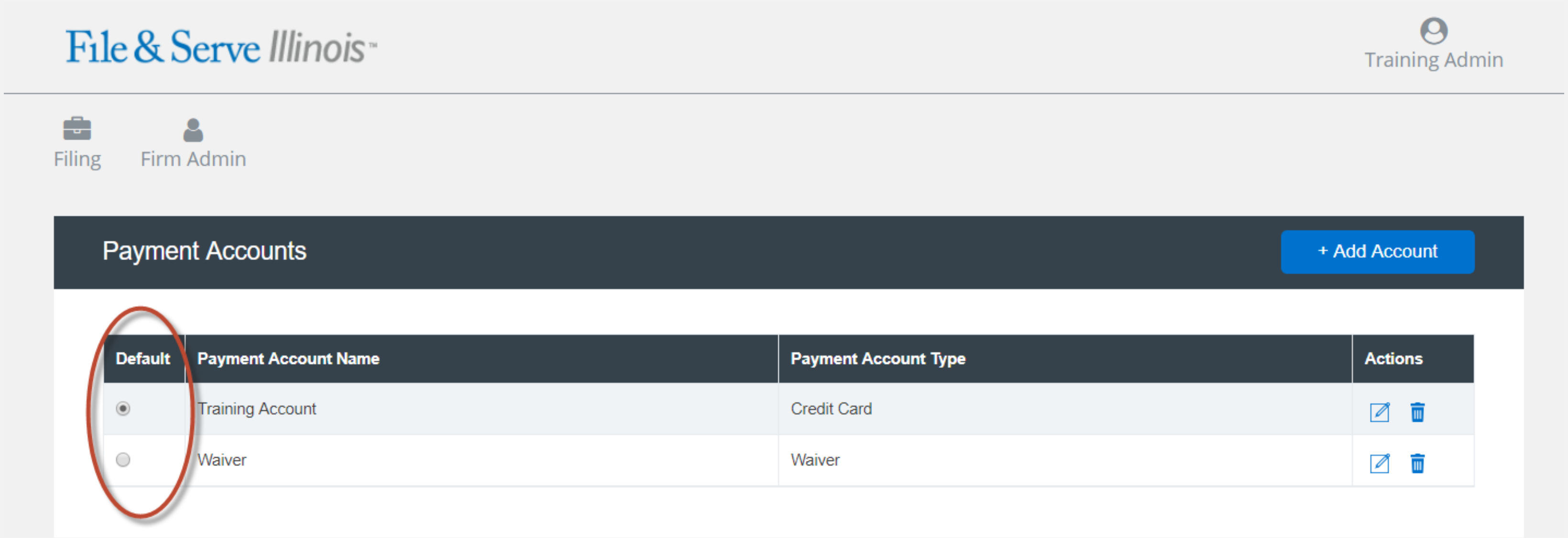


3. Enter the payment account name, choose the account type, Waiver, and click **Submit**.
4. Click **OK** and the account will appear in your accounts list:



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)*

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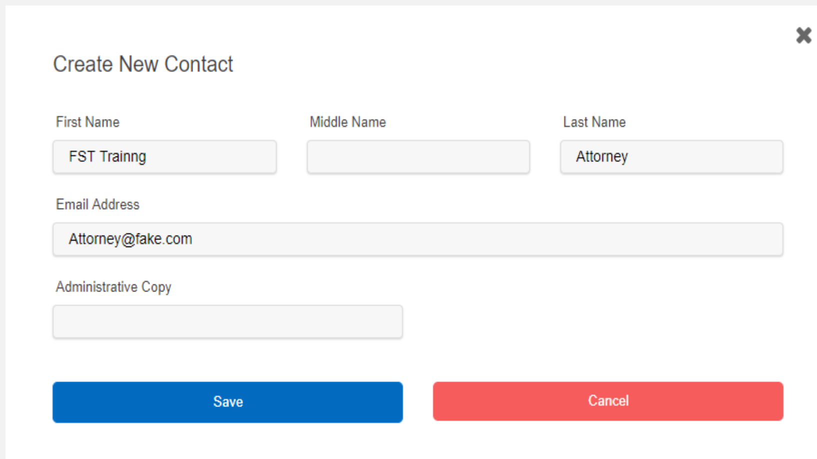
To **Add** a service contact, follow these steps:

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

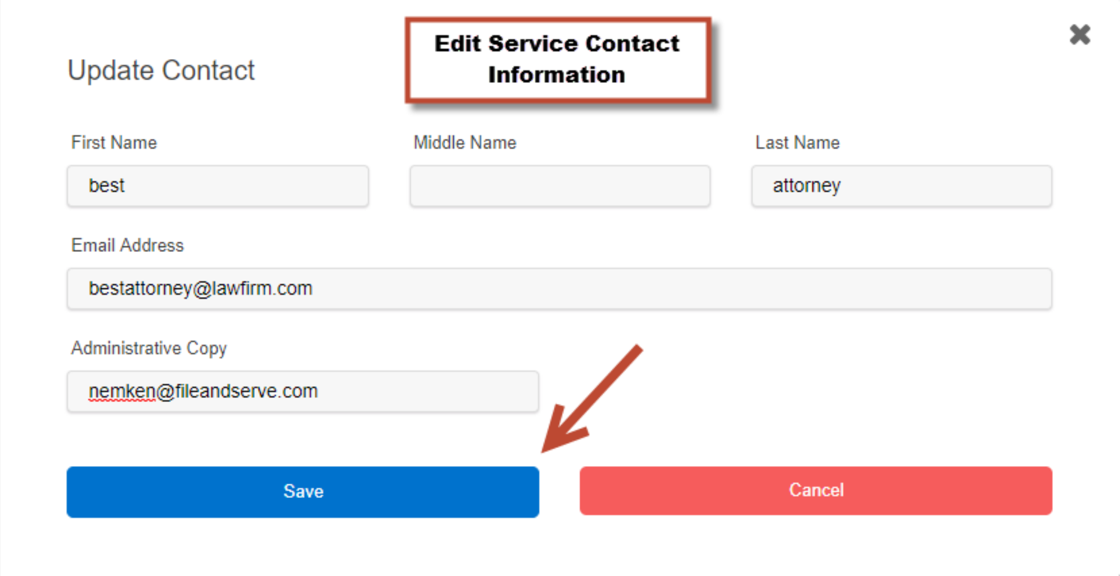
File & Serve Illinois™

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)*

File & Serve *Illinois*™

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	

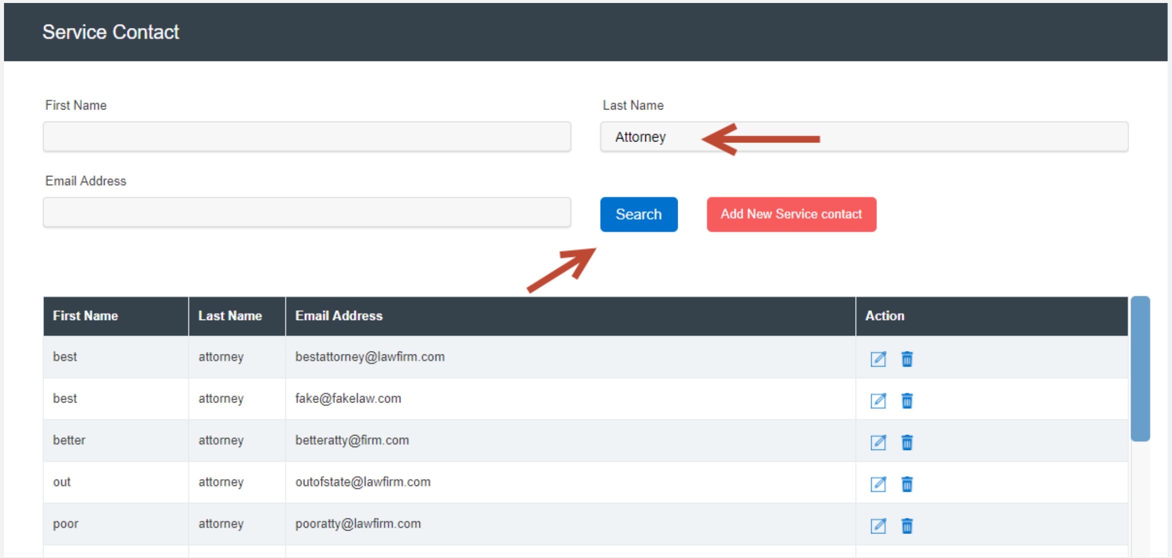
How to Search for Service Contacts
(Service Contacts Tab)

File & Serve Illinois™

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.

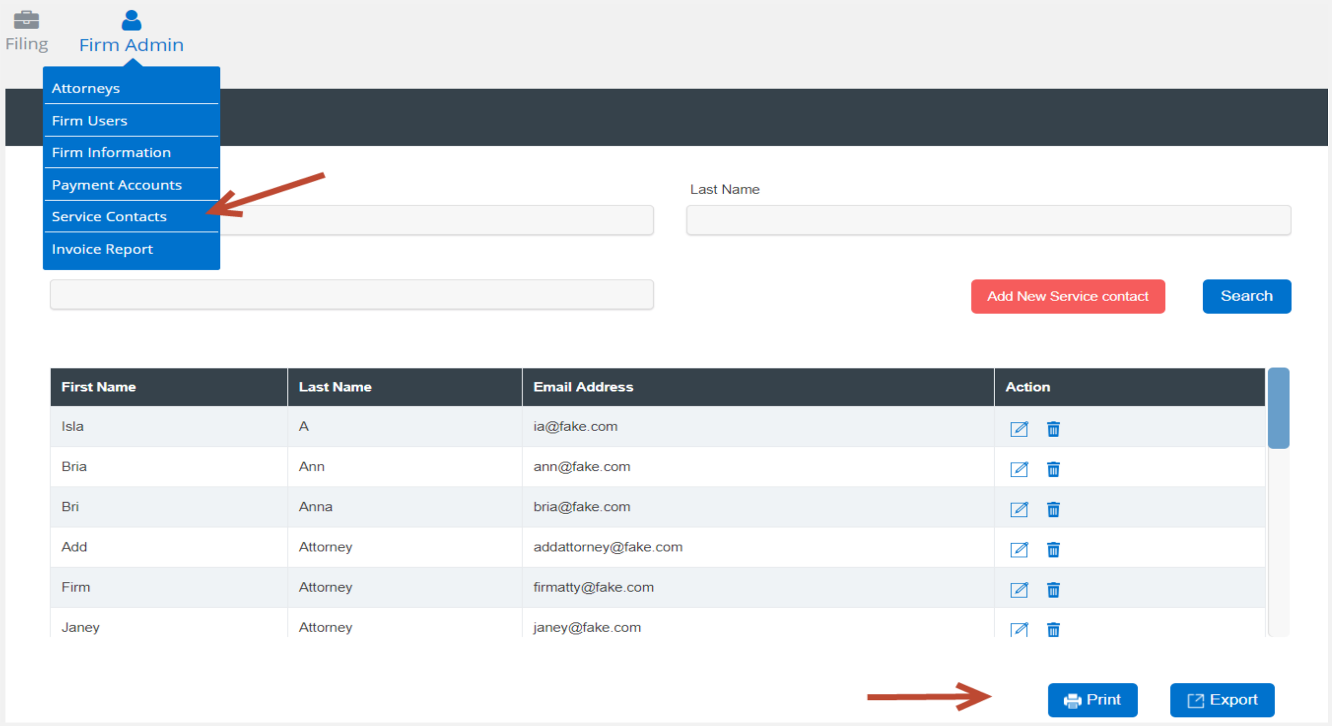


Print/Export Firm Service Contacts

(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**.

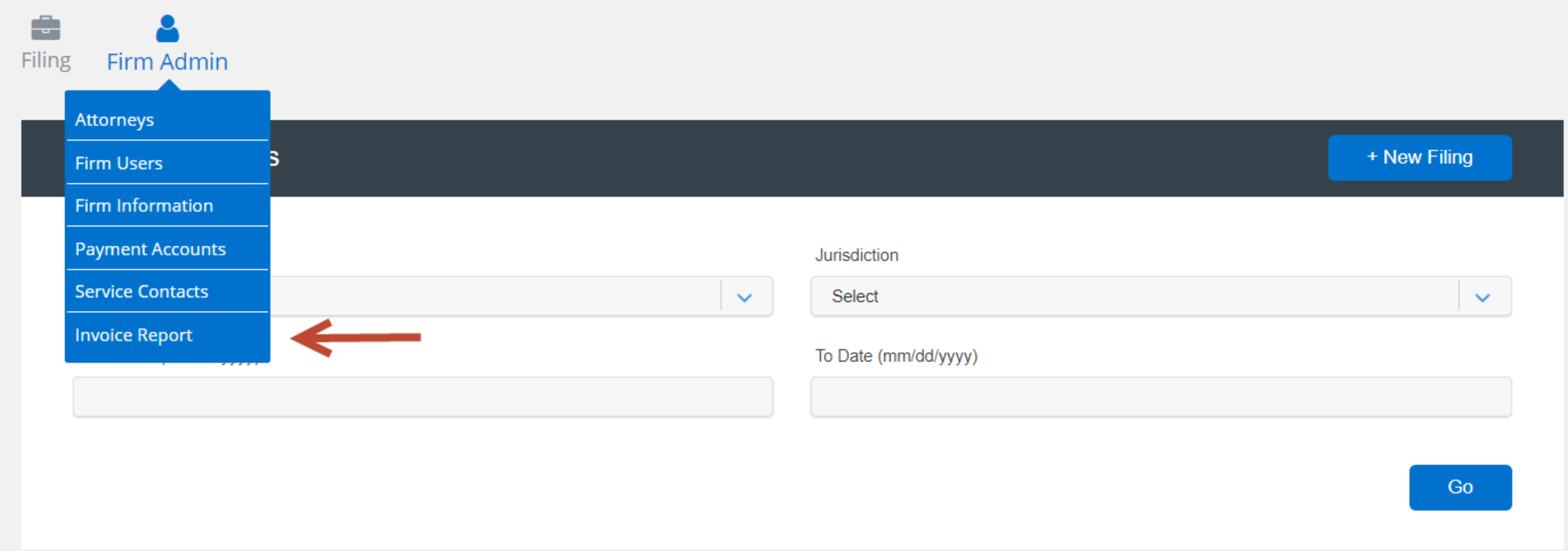
Note: **Export** will download an excel spreadsheet with all **Firm Service Contacts** for the Firm. First Name, Last Name, email address, role, and status. **Print** will open the browser's print dialog window to allow the user to print the list of **Firm Service Contacts** within in the Firm**.**



How to Create Monthly Invoice Report

File & Serve Illinois™

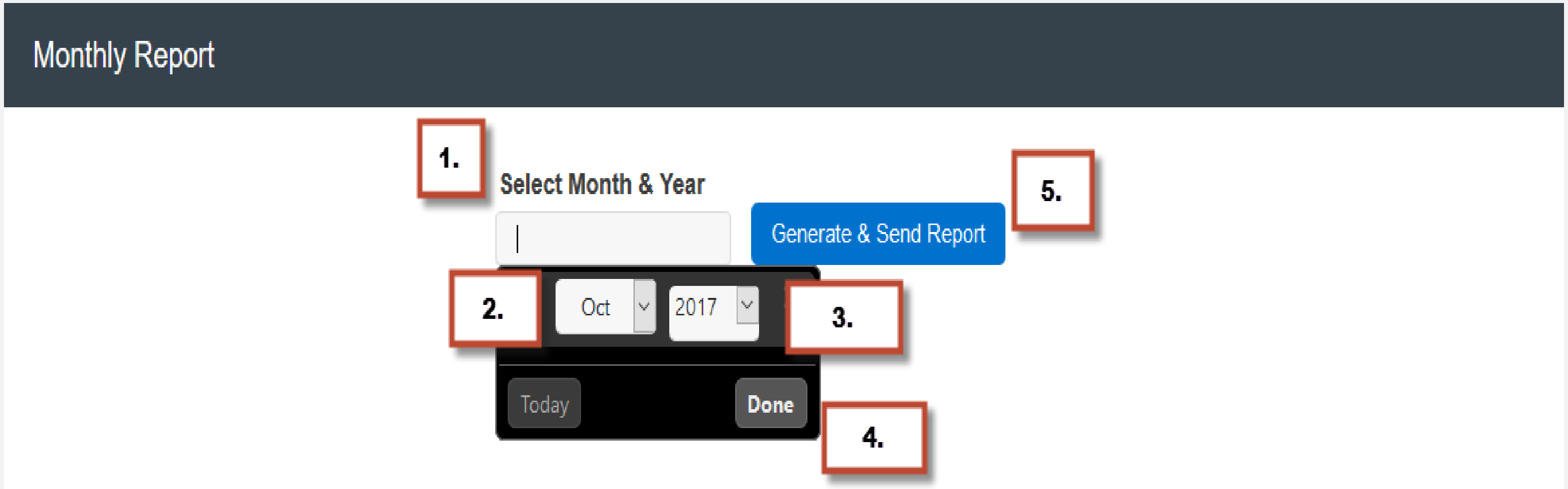
1. Under the Firm Admin drop-down menu, click on **Invoice Report**.



How to Create Monthly Invoice Report *(continued)*

File & Serve Illinois™

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)*

File & Serve Illinois™