

File & Serve *Xpress*™

Alerts - User Guide



File & ServeXpress

Alerts

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File & Serve Resources

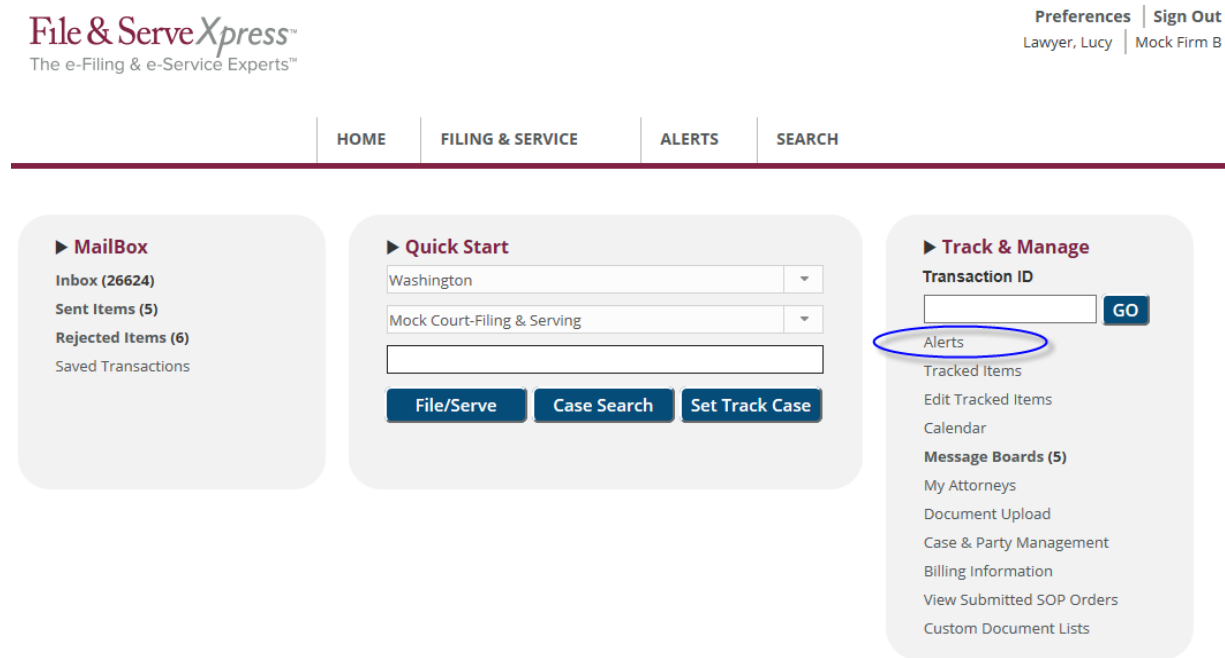
File & ServeXpress has many resources available to you in order to address your questions and concerns.

- **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.

Alerts Overview

The **Alerts** feature is a 24/7 automated assistant that constantly searches the system for cases that match specified criteria and notifies the user of the case by email. Alerts can be used to:

- ✓ Keep abreast of all filing and/or service activity that you may not have been served with.
- ✓ Avoid liability by getting notified of important filings.
- ✓ Research related cases and set up notices for similar filings by other attorneys.
- ✓ Enhance business development by getting notices when your client is named in a new case and access that Complaint immediately.



You can choose to receive an email notification for your Alert or you can monitor your results online.

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Alerts Tips:

- ✓ **Pricing:** With File & ServeXpress Alerts, Users are not charged by individual matches. Alerts are only \$20.00 monthly to maintain no matter how many matches are found! **Note:** ALWAYS CHECK THE FILE & SERVEEXPRESS RESOURCE CENTER FOR MOST UP-TO-DATE PRICING
- ✓ **Limitations:** Alerts are only triggered if a document is submitted with the File & ServeXpress system and if the document identically matches the Users Alert criteria. Alerts are not triggered by paper-filed documents if the court does not update File & ServeXpress. Serve Only – Private documents will only be generated if your firm is on the service list. Please allow up to 24 hours for Alerts to process.
- ✓ **Note:** Alerts can be shared by members of the same firm at no extra charge using the “Share Alert” drop-down menu.

Alerts Setup

To access existing Alerts and set up new Alerts, click the **Alerts** link in the **Track & Manage** area of the **Home** page.

The page will refresh with the **Alerts** screen:

Home | Filing & Service | **Alerts** | Search

Alert Configurations

[Create New Alert](#)

Name	Unread	Enabled	Owner	Actions		
Disney	N	Y	Y	Edit	Copy	Delete

[Create New Alert](#)

1. To set a new Alert, click the [Create New Alert](#) link to go to the **Alerts** setup page.

Alert Setup

Alert Name

*** Billing Reference**

Email Notification

Do not send me email notification

Send me email notification

Temporarily Disable Alert

Do not disable alert

Disable alert

Alert On My Firm's Transactions Transactions in my Firm's Cases Transactions in All Cases

Share Alert

► **Track & Manage**

Transaction ID

GO

Alerts

Tracked Items

Edit Tracked Items

Calendar

Message Boards (5)

My Attorneys

Document Upload

Case & Party Management

Billing Information

View Submitted SOP Orders

Custom Document Lists

2. Enter a **name** for your Alert (names should be as descriptive as possible so that you easily recognize what the **Alert** is for).
3. Select your **Email** preference for your Alert.
4. Select your **Shared** preferences in order to share your alert with other users in your firm.

The screenshot displays a web-based alert configuration interface. It is divided into three main sections: Case Information, Document Information, and Party Information. Each section contains various input fields and dropdown menus, along with 'Find' and 'Clear' buttons. The Case Information section includes fields for Case, Case Group, Court, Case Class, and Case Type. The Document Information section includes a Document Type dropdown menu with options like 'Abstract Of Judgment' and 'Add Selections' link, and a Document Title field. The Party Information section includes fields for Authorizing Attorney/Firm, Served Attorney/Firm, Judge, Sending Party, Served Party, and Party In Case, each with a 'Find' and 'Clear' button. At the bottom right, there are 'Cancel' and 'Save' buttons.

5. Select a court and/or a case to run Alerts in (you must select at least one).
6. If desired, Alerts can be run in multiple courts and/or cases. To select multiple courts and/or cases, simply use the drop-down menus and click on each desired entry until your criteria is complete.
7. Select Case Class(es) and/or Case Type(s) (*optional*).
8. If you wish to search on a specific Document Type, select that Document Type from the list. (use the CTRL key to make multiple selections). If you wish to have an Alert set for all Document Types in your court/jurisdiction, simply skip over this section.

Alerts Tips:

- ✓ **Note:** All fields after the **Alerts Setup** section (i.e. Case Information, Document Information, and Party Information) are considered “and” connectors. Searches will be performed to validate that each selected criteria is found in a search.
- ✓ **“Add All” Hyperlink:** Once you have selected a Court, an **Add All** hyperlink will be displayed. If you click this hyperlink, all Courts within that specific jurisdiction will be added to your Alert criteria.
- ✓ **“Remove” Hyperlink:** Once you have selected any number of Courts, a **<<remove** hyperlink will be displayed. If you click this hyperlink, the respective Court will be removed from the list.

9. Enter words to search for in document titles if desired. (**Note:** using this criteria will narrow your search results to documents including those words only).
10. Enter criteria for Party information. You may choose to enter information for any or all of the following criteria: Authorizing (sending) firm, Authorizing Attorney, Served Attorney, Served Firm, Sending Party, Served Party or Party in Case. (**Note:** entering information for all criteria will narrow your search results to documents including all of the criteria you select).
11. Click the [Save](#) hyperlink.

Alerts Tips:

- ✓ **Limiting Alerts:** When adding **Alert** criteria, “less is more”. In other words, the more criteria that are entered, the more specific the system will try to make the search. If any one criterion does not match, the **Alert** may not find exactly what you are looking for. (e.g. if document type “Complaint” is selected and the document is filed under “Complaint and Jury Demand” the **Alert** will not be triggered). To guarantee that your Alert will pick up all variations of a filing type used, be sure to include all similar Filing Types.

Modifying Existing Alerts

Home | Filing & Service | **Alerts** | Search

Alert Configurations

[Create New Alert](#)

Name	Unread	Enabled	Owner	Actions		
Disney	N	Y	Y	Edit	Copy	Delete

[Create New Alert](#)

To view or modify an existing Alert, click the following hyperlinks:

1. **Alert Name Hyperlink** – To view new Alerts, click on the Alert name to be directed to new transactions that match your **Alert** criteria.
2. **Edit** – Make changes to existing Alerts, including temporary disable of Alert.
3. **Copy** – Copy an existing alert, make changes and save as a new Alert.
4. **Delete** – Permanently disable an alert.

Conflicts in Setup

When setting Alerts, you may on occasion get conflict errors and be asked to edit your Alert criteria. Conflicts are caused by selecting a Court, Case Class or Type, and Document Types that do not match. For instance:

- ✓ If selecting criteria to search for “Complaints” in Domestic Relations cases in Colorado, you would get a conflict because complaints are not a document type available in Colorado Domestic Relations cases, or
- ✓ If selecting criteria to create an Alert for “Water Cases” in San Francisco, you would get a conflict because water cases are not a supported case class in San Francisco.

Alerts Tips:

- ✓ **Columns: Unread, Enabled, and Owner** columns will show either a “Y” for Yes or an “N” for No to designate whether or not there are new Alert items, the Alert is enabled, or the User is the owner of the Alert.
- ✓ **Editing Alerts:** Only the author of an Alert can make changes. Other users can copy an Alert and make edits to their own copy if desired. A Shared Alert recipient can:
 - Change email notification options
 - Delete the Alerts from their own inbox if desired