

File & Serve *Texas*™

USER GUIDE

Firm Administrator

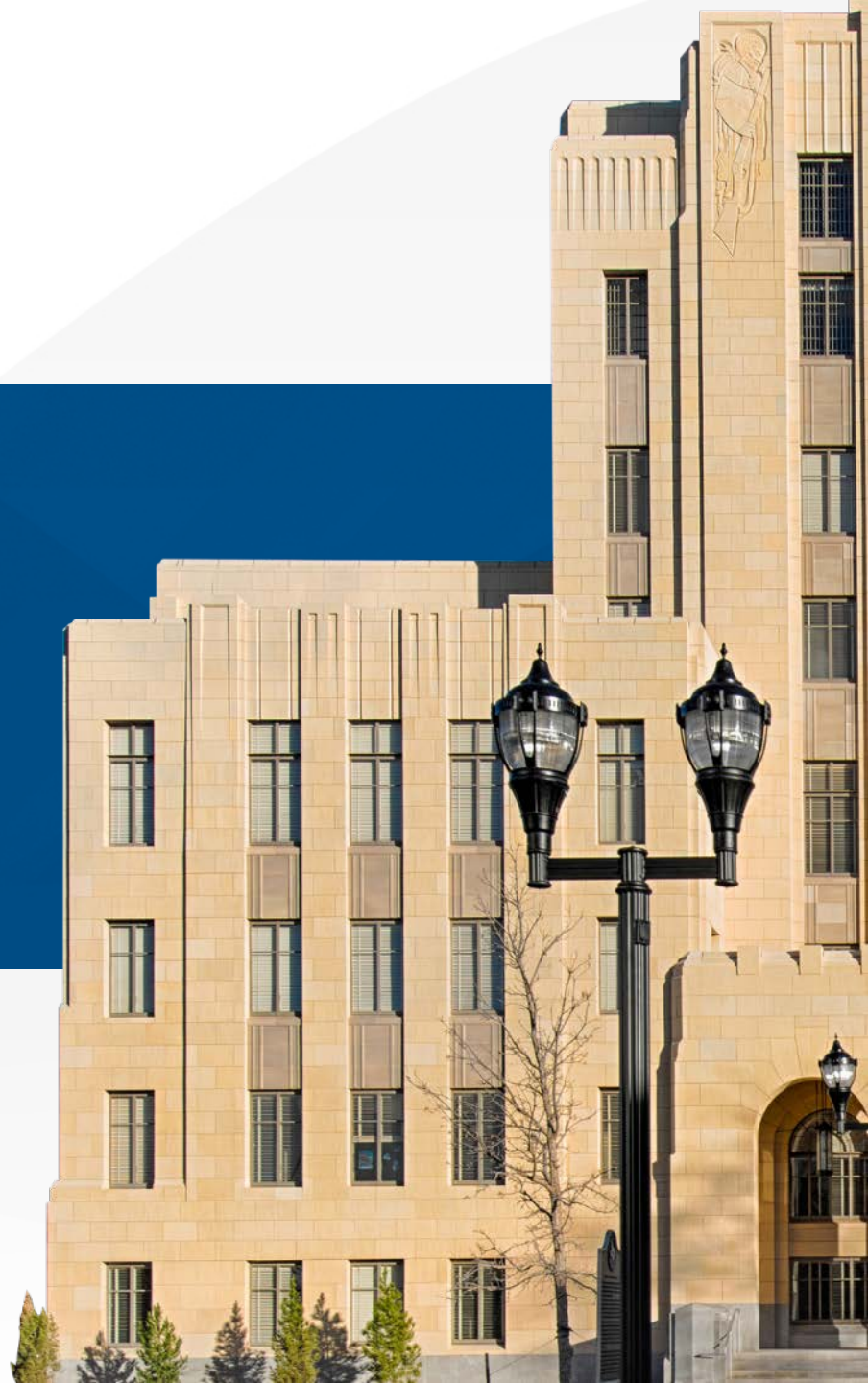


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AGENDA

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 on electronic filing prior to using File & Serve Texas 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 Texas.
3. If you need assistance, call our Client Support line at 1-888-529-7587.

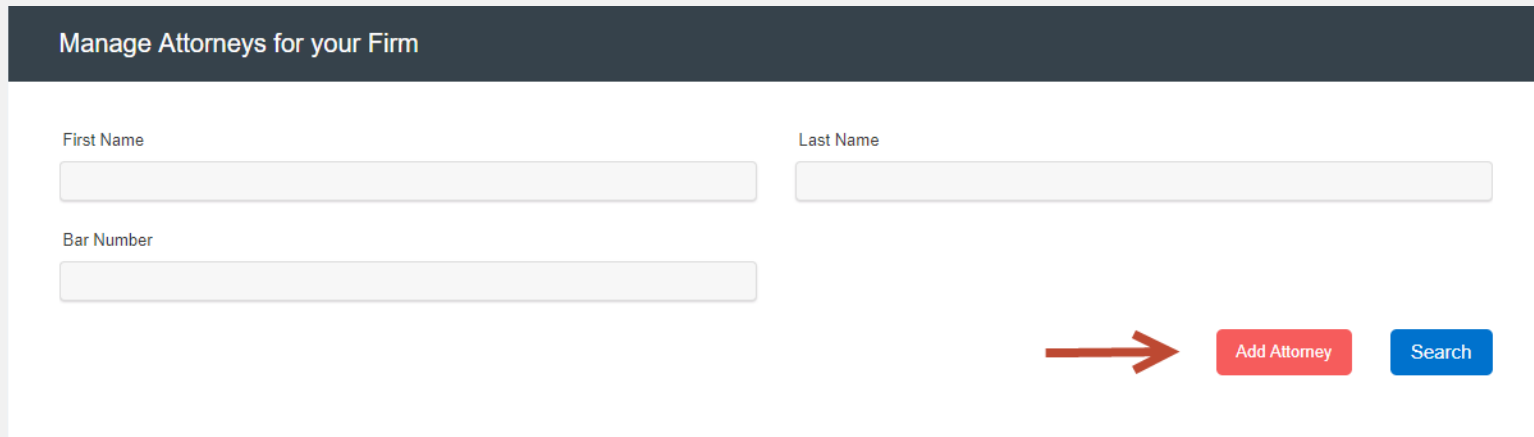
Logging in to File & Serve Texas

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**.

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




*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)

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 a close button (X) in the top right corner. It contains four input fields: 'First Name' (containing 'FSTX Training'), 'Middle Name' (empty), 'Last Name' (containing 'Attorney'), and 'Bar Number' (containing '123456'). Red arrows point to the 'First Name', 'Last Name', and 'Bar Number' fields. At the bottom, there are two buttons: a blue 'Save' button and a red 'Cancel' button.

First Name	Last Name	Bar Number	Actions
FSTX Training	Attorney	24049224	 

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
FSTX Training	Attorney	24049224	 

5. This will open a new screen:

Update Attorney ✕

Edit Attorney Information

First Name

Middle Name

Last Name

Bar Number

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

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

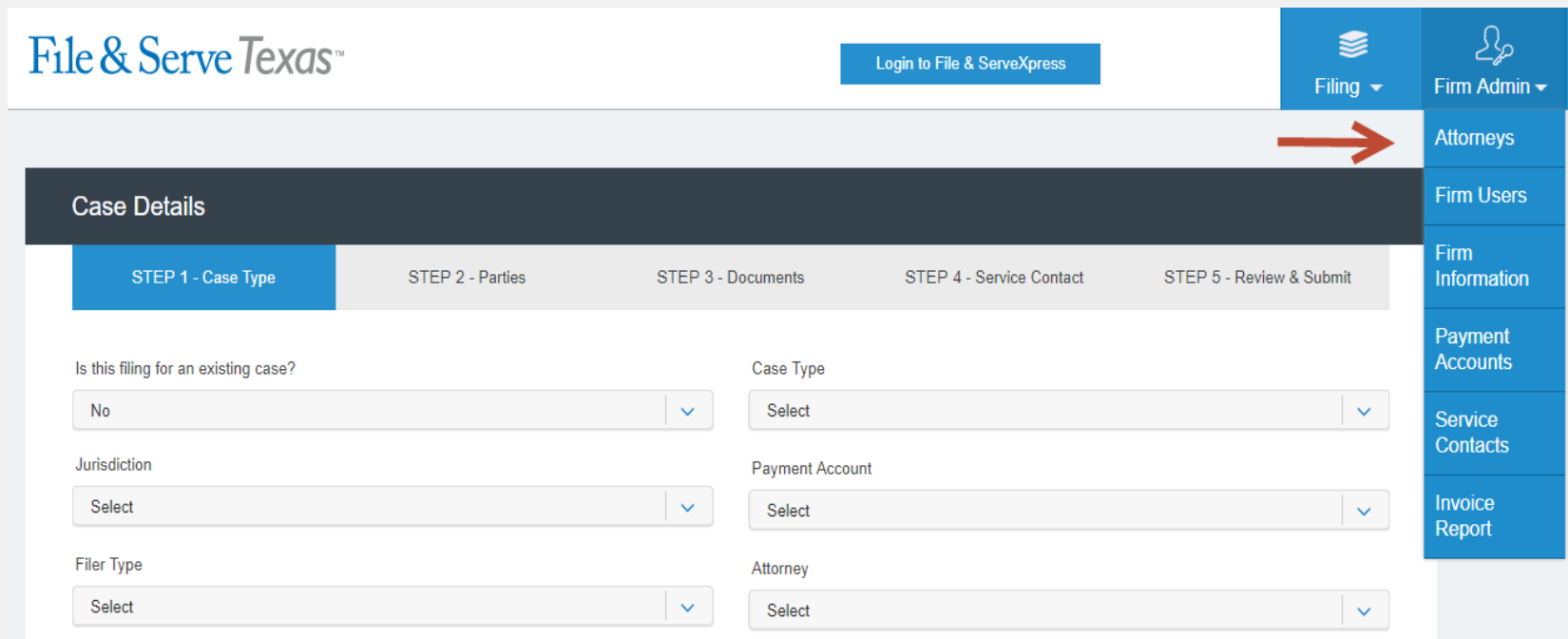
5. Click on the **Trash Can** button:

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.



The screenshot displays the File & Serve Texas web application interface. At the top left is the logo 'File & Serve Texas™'. To its right is a 'Login to File & ServeXpress' button. Further right is a 'Filing' dropdown menu and a 'Firm Admin' dropdown menu. A red arrow points to the 'Attorneys' option within the 'Firm Admin' dropdown. Below the navigation bar is a 'Case Details' section with a progress bar showing five steps: 'STEP 1 - Case Type' (active), 'STEP 2 - Parties', 'STEP 3 - Documents', 'STEP 4 - Service Contact', and 'STEP 5 - Review & Submit'. The main content area contains several dropdown menus for data entry: 'Is this filing for an existing case?' (set to 'No'), 'Jurisdiction' (set to 'Select'), 'Filer Type' (set to 'Select'), 'Case Type' (set to 'Select'), 'Payment Account' (set to 'Select'), and 'Attorney' (set to 'Select'). On the right side of the interface is a vertical sidebar with buttons for 'Attorneys', 'Firm Users', 'Firm Information', 'Payment Accounts', 'Service Contacts', and 'Invoice Report'.

How to Search for Firm Attorneys (Attorneys Tab)

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

Add Attorney
Search

First Name	Last Name	Bar Number	Actions
FSTX Training	Attorney	24049224	
Attorney	In	24049224	
Attorney	In	18532500	

Print
 Export


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
<input type="text"/>	<input type="text"/>
Email Address	Role
<input type="text"/>	Select <input type="text"/>



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.

The screenshot shows a 'Create New User' modal form with the following fields and options:

- First Name: Support
- Middle Name: (empty)
- Last Name: Staff
- Email Address: supportstaff@lawfirm.com
- Roles: Firm Admin, Filer

A red box highlights the roles section with the text: "Select whether Firm Admin, Filer, or both." A red arrow points to the 'Save' button.

Below the form is a table representing the Firm Users list:

Support	Staff	supportstaff@lawfirm.com	Filer	Unverified		Resend Verification
---------	-------	--------------------------	-------	------------	--	---------------------

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	File	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
---------	-------	--------------------------	------	--------	-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	----------------

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

Add New User
Search

First Name	Last Name	Email Address	Role	Status	Action	
integratedcft	+1101d	integratedcft+1101d@gmail.com	Filer	Active	✎ 🗑️	Reset Password
integratedcft	1101a	integratedcft+1101a@gmail.com	Filer	Unverified	✎ 🗑️	Resend Verification

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:

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 *
Card Number *
Exp Month * **Exp Year** *
CVV Code * [CVV Help](#)
Name on Card *
Address Type US Foreign
Address Line 1 *
Street address, P.O. box, company name, c/o
Address Line 2 *
Apartment, suite, unit, building, floor, etc.
City *
State
Zip Code

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

Verify Billing Information

Billing Detail	
Card Type	VISA
Card #	XXXXXXXXXX1681
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 Texas to save the account:

✕

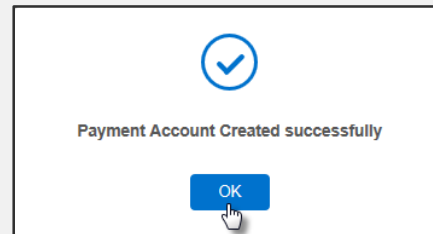
Create Payment Account



Payment Account Name

Visa 1

Save Cancel

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



Payment Account Name	Payment Account Type	Actions
Visa 1	Credit Card	 

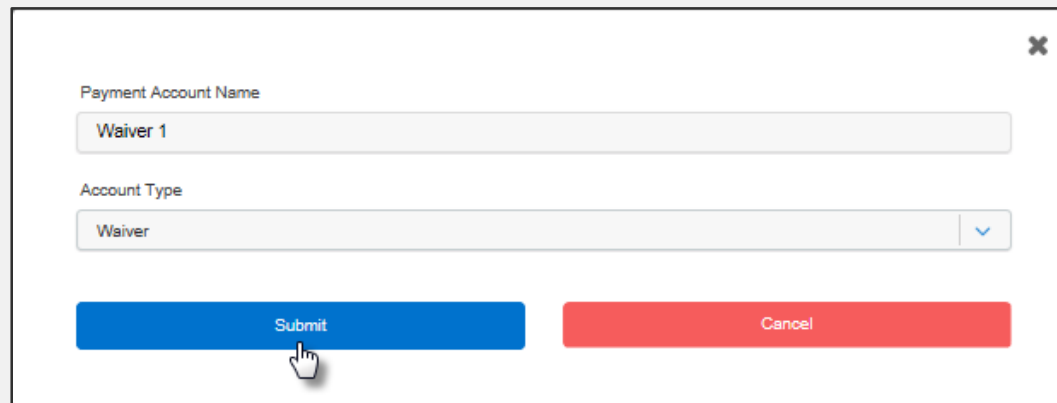
Payment Accounts Tab *(continued)*

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

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

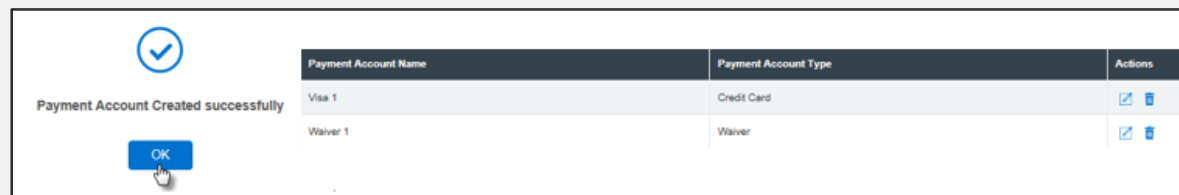


2. This will open a new screen:



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

File & Serve Texas™ Login to File & ServeXpress

Filing Firm Admin User profile Log Out

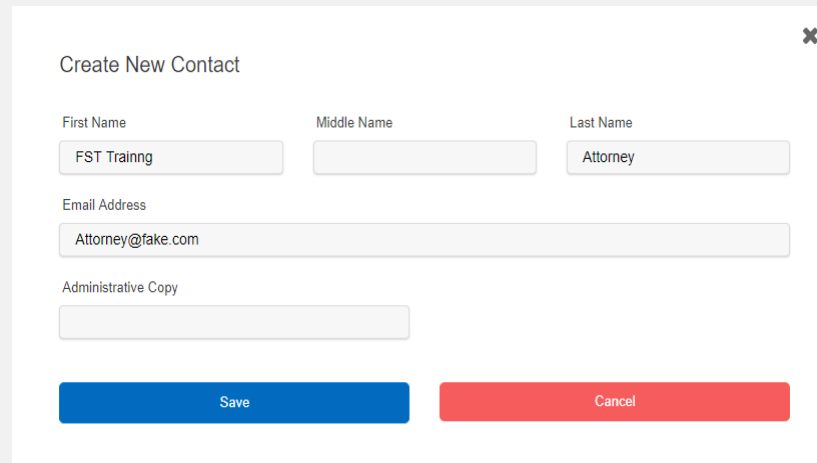
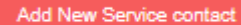
Payment Accounts + Add Account

Default	Payment Account Name	Payment Account Type	Active	Actions
<input checked="" type="radio"/>	Mastercard	Credit Card	Yes	
<input type="radio"/>	Waiver	Waiver	Yes	
<input type="radio"/>	Visa	Credit Card	Yes	

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:



Create New Contact



First Name: FST Trainng Middle Name: Last Name: Attorney

Email Address: Attorney@fake.com

Administrative Copy:

Save Cancel



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:

Update Contact

Edit Service Contact Information

✕

First Name

Middle Name

Last Name

Email Address

Administrative Copy




Save

Cancel

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.

Service Contact

First Name

Last Name ←

Email Address

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