File & Serve*Xpress*

Message Boards
User Guide

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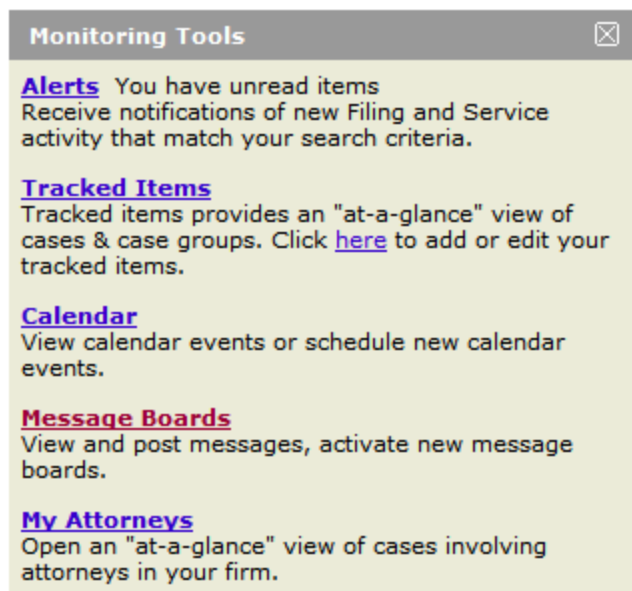
Message Boards

Table of Contents

File & Serve Resources

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

- **File & Serve*Xpress* 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 & Serve Resource Center** is available within File & Serve by clicking on the Resource Center link at the top, right hand side of your screen. The Resource Center contains our training registration information, jurisdiction specific rule & procedures, user guides, best practices, pricing and much more!

- **File & Serve Login Page** www.fileandservexpress.com is where you can find password help, what's new and any important information like scheduled maintenance or system changes.

- **File & Serve Notices** is an information page that is available on the bottom, left-hand side of the File & Serve Home tab, once you sign into File & Serve. 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.

Message Boards Overview

Any firm that is an active case participant on a File & Serve case has the ability to activate a Message Board for that case. This is a premium feature that has a monthly flat rate charge per message board, regardless of how many messages are posted. This feature gives users one application in which they cannot only e-file/e-serve, but can also communicate with the other participants in the case without having to worry about correct email addresses, undeliverable emails, full mailboxes, or incomplete distribution lists.

Click on the **Message Boards** hyperlink to view your message boards and post/reply to messages.

✓ **Functions:** message board delivers psoted messages and replies to those messages to all active case parties via the File & Serve system.

✓ **Pricing:** flat rate of $5/month/message board regardless of how many messages are posted. At the time of activating a Message Board, only the activating firm will be charged. There is no cost to the other case participants to read the message board postings online or to receive email notifications. However, the $5.00 charge will be implemented on all firms that post replies/messages. **Note:** ALWAYS CHECK THE FILE & SERVE RESOURCE CENTER FOR MOST UP-TO-DATE PRICING

✓ **Activation:** Any organization representing an active case participant can activate the Message Board for that case.

✓ **Deactivation:** Message Boards will automatically deactivate when a firm is removed from a case or a case is closed. Any firm that wishes to turn off message board prior to the case being closed must call File & Serve Client service.

Activating Message Boards

1. To activate a Message Board, the user clicks on the **Message Boards** hyperlink on the system. They will then see a link to activate a Message Board.

Message Boards

Use Message Boards to view and post messages related to litigation. Click on a Message Board name to read the Subjects and Messages for a specific litigation. New messages are also e-mailed to the active case participants in the litigation on File & Serve.

Activate a Message Board

2. After clicking on the "Activate a Message Board", choose the appropriate jurisdiction, court, and full or partial case name, or case number.

Activate a message board for a specific case. All case participants will have access to the message board.

Case Information
Enter search criteria to find your case.

* Jurisdiction: Colorado

* Court: CO Mock County District Court

Case Number: 2011cv1   Case Name:

Search   Cancel

3. Click the **Search** button. A list of cases will be displayed (screen shot on next page).

Message Board Tips:

✓ **Limitations:** Support Staff at a Law Firm can activate a Message Board, but they will need to set up Forward Notifications for the attorney on the case in order to receive email notifications of new postings.

✓ **Notifications:** At the time of the Message Board activation, the system will send a notice out to all the File & Serve subscribers on the case, notifying them that a message board has been activated for their case.

✓ **Billing References:** Billing references can be provided when activating a message board. Organization Administrators can also set up mandatory billing references for this feature.

When another case participant posts a message for the first time to a Message Board, the system will prompt the user, alerting them that they will begin to incur charges and they will have an opportunity to provide a Billing Reference number for the Message Board.

Case Number Case Name ▲	Message Board Status
○ **2011CV1118** Alpine Contractors vs CO Construction Co	Activated: Alpine Contractors vs CO Construction Co
○ **2011CV1125** Bank of the West vs Amanda Carlson	Activated: Bank of the West vs Amanda Carlson
○ **2011CV1124** Bank of the West vs Henry Tate	Activated: Bank of the West vs Henry Tate
○ **2011CV1123** Bank of the West vs Susan Miller	Activated: Bank of the West vs Susan Miller
○ **2011CV1122** David West vs Vista Hospital	Activated: David West vs Vista Hospital
○ **2011CV1134** Larry Smith vs Henry Ralston	Activated: Larry Smith vs Henry Ralston
○ **2011CV1126** Leslie Adams vs Michael Moore	Activated: Leslie Adams vs Michael Moore
○ **2011CV1140** Susan Brown vs Linden Alby	
○ **2011CV1142** Wells Fargo Bank NA vs Susan Miller	Activated: Wells Fargo Bank NA vs Susan Miller
⊙ **2011CV1141** Wells Fargo vs Linda Lee	

|◄ ◄ 1 ► ►| Page size: 10 ▼   10 items in 1 pages

4. Click the radio button next to the case in which you would like to activate a message board.
5. Enter a **Billing Reference** at your discretion and click the **Activate Message Board** button.

Message Board Name

* Message Board Name: Wells Fargo vs Linda Lee

Your organization will be charged $0.00 per month to activate this message board.

Billing Reference: [   ]

To learn more about using this feature visit the Resource Center page.

Activate Message Board

Message Board Tips:

✓ **Duplicate Message Boards:** A case on File & Serve can have only one Message Board activated. If a user tries to activate a message board for a case that already has one, the case will appear in the results – but the **Message Board Status** will indicate that a message board has already been activated for the case.

✓ **Confirmation:** File & Serve will confirm when a **Message Board** is activated:

Activate a Message Board ℹ️

⚑ Wells Fargo vs Linda Lee message board has been activated successfully

Managing Message Boards

When users click on the **Message Boards** hyperlink in their "Monitoring Tools" section of the Home tab, they will see a streamlined view of their Message Boards. All columns are sortable, so users only need to click on a column header to change the sort from ascending to descending. When users click on Message Board, the system will default the sort of Message Boards to bring those with unread messages to the "top" automatically.

Unread ▲	Message Boards	Court	Last Post
🗒	Mock Court e-service participants - PI	Mock Court-E-Service	10/1/2009 11:40 AM EDT
	Wells Fargo vs Linda Lee	CO Mock County District Court	5/25/2012 1:07 PM MDT

1. To view unread message board postings, click on the hyperlink of the case name.
2. The page will refresh with all of the postings in that particular message board.

Create New Subject

Search

Unread ▲	Subjects	Author	Replies	Last Post
	Pre-Trial Meetings	Payne, Justin, Mock Appeals Firm A-Demo	-	5/25/2012 1:07 PM MDT

🗒 Denotes new posts in this subject since your last visit.

3. To view a posting click on the hyperlink in the **Subjects** column. Once the page refreshes, a **Reply** hyperlink will appear in the end column of each subject. Click the link to reply to respective messages.
4. To create a new posting, click on the **Create New Subject** hyperlink.

Message Board Tips:

✓ **Tack and Note Icon:** The yellow note with a tack in it in the **Unread** column denotes that there is an unread message board posting in that case.

✓ **Sortable Column Headers:** When users click on a specific Message Board name and are taken to all the subjects within that board, the column headers there are also sortable and the subjects with unread messages are also defaulted to be sorted to the top. All columns that dsplay as hyperlinks in the system are sortable.

Message Boards Notifications

1. For **Email Notification of Message Board Postings, <u>Attorney</u>** users should use "Forward Notification Options":
    a. Use the radio buttons to select the type of email notification desired.
    b. Use the drop-down menu to select individuals to be "copied" on message board postings.
    c. Click the "Save" button to ensure that your changes are updated in the system.

Message Board Notification Tips:

Located in *File & Serve Preferences.*

Notification Tips:

✓ **Note:** All email notifications are complimentary and are not guaranteed. Items that have been electronically served are guaranteed to arrive in users' Inboxes. We suggest checking the Inbox daily for the most current service information.

✓ **Removing a user from the list:** to delete a user from the notification, click the "X" next to the user. To "block" a user from sending notifications to you, select that user in the "Block" drop-down menu.

Options

My Profile

My Information
My Organization
My ID and Password
My Notification Options
My Saved Transaction Access

My Organization Profile

Add User
Manage Users
Set Permissions
Modify Client Matter

Support Statistics

Support Statistics

Receive Notification Options

Notify me when the following users are notified of message board messages:

Name   **Remove**

Add another user to my list: -Select-

2. For **Email Notification of Message Board Postings, <u>Non-Attorney</u>** users should use "Receive Notification Options"**:**
   a. Use the radio buttons to select the type of email notification desired.
   b. Use the drop-down menu to select individuals to be "copied" on their message board postings.
   c. Click the "Save" button to ensure that your changes are updated in the system.