

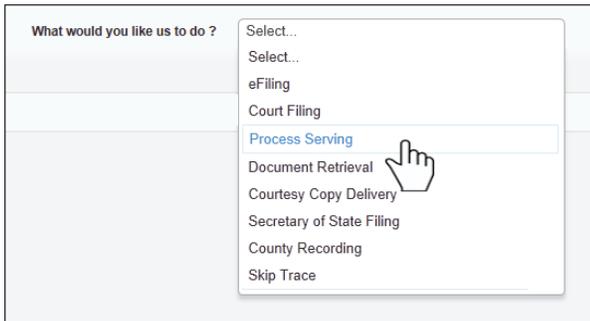
On the provided login page, type in your email, password and click on the "Login" button.

Please note: We recommend using any modern browser for the best experience.

1 Once you are logged into the customer portal, click on "Place an Order."



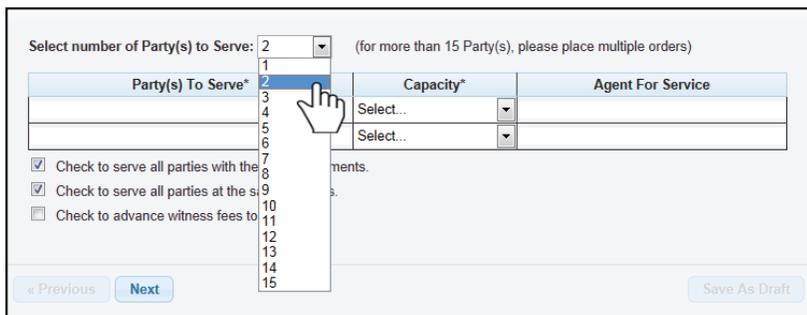
2 In the "What would you like us to do?" field, select "Process Serving."



3 On the field "Select number of Party(s) to Serve:" click on the drop down menu and select the number of entities to be served.

Type the name of the parties to be served, their capacity, and agent for service (if known).

Click on "Next."



To save you time, if all the entities will be getting served with the same documents or served at the same address, be sure to checkmark the appropriate box.

Check to serve all parties with the same documents.

Check to serve all parties at the same address.

Check to advance witness fees to all parties.

4 Enter in the Case Number, select the Jurisdiction of where the documents were filed and select the Attorney of Record.

In the event that you do not have a case number, check the box “Check here if you do not have a Case Number”, then select or add attorney of record.

Case Number:

Jurisdiction:

Proof of Service Information

Attorney of Record: <input type="text" value="Michael Good"/>	Firm Name: Richards Law Group
	Address: 312 W. 2nd Street, Suite 1006
	City/State/Postal: Los Angeles CA 90012
	Phone: 800 3665445

If you would like a different name to appear on header of proof then select “Check here to override name on Proof of Service.”

Case Number:

Check here if you do not have a Case Number.

Proof of Service Information

Attorney of Record: <input type="text" value="David Saldana"/>	Firm Name: <input type="text" value="Joe Test 23 Account"/>
	Address: <input type="text" value="312 W. 2nd Street, Suite 1006"/>
	City/State/Zip: <input type="text" value="Los Angeles CA 90012"/>
	Phone: <input type="text" value="(800) 366-5445"/>

Check here to override name on Proof of Service

Click on “Next.”

- Next, you'll need to enter the case participants such as the Plaintiff and Defendant in the case. You will only need to add the lead party(s).

Click on the “**Add Party(s)**” button.

The screenshot shows a software interface with a button labeled "Add Party(s)" at the top right. Below it is a table with columns for "Lead Client", "Name", and "Role". The table is currently empty, with a message "There are no Case Participants entered". Below the table, there are pagination controls: "Show 50 entries", "Showing 0 to 0 of 0 entries", and buttons for "First", "Previous", "Next", and "Last". At the bottom of the interface, there are "Previous" and "Next" buttons on the left, and a "Save As Draft" button on the right.

 If you select “**Yes**” to indicate that this is your client, a “**Billing Code**” may be required to proceed. The “**Billing Code**” is your firm’s internal, billing, or client matter number code on a particular case.

Click on “**Next.**”

- When uploading your documents with multiple serves, each entity will be listed with the heading “**(Document Required).**” Click on the entity’s name to open the document field.

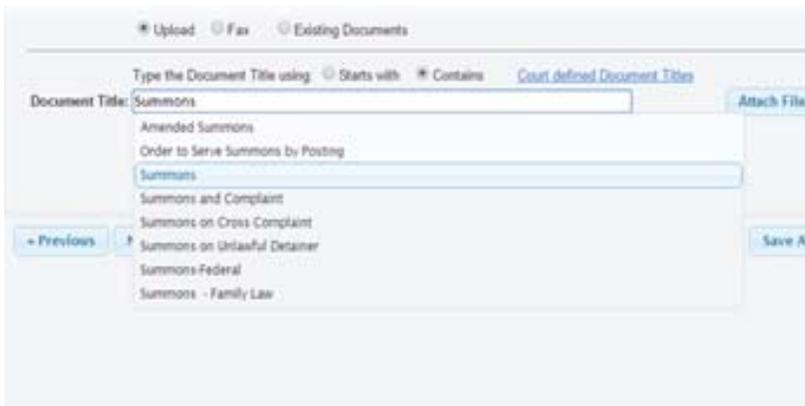
The screenshot shows a software interface with radio buttons for "Upload" (selected) and "Fax". Below this is the instruction "Click on Party Name below to add Documents if required". There are two expandable sections: "Documents for Robert Monroe - Individual" and "Documents for Robert's Pool Cleaning - Fr...". Each section has a right-pointing arrow and a "(Document required)" label. A hand cursor is pointing at the first section. At the bottom, there are "Previous" and "Next" buttons on the left, and a "Save As Draft" button on the right.

On the Documents Tab, there are 3 options to submit documentation necessary to complete your Process Serve order:

- **Upload** – upload document(s) directly from your computer.
- **Fax** – provide a list of document(s) to be faxed separately.
- **Existing Documents** – select previously uploaded document(s) from an existing case.

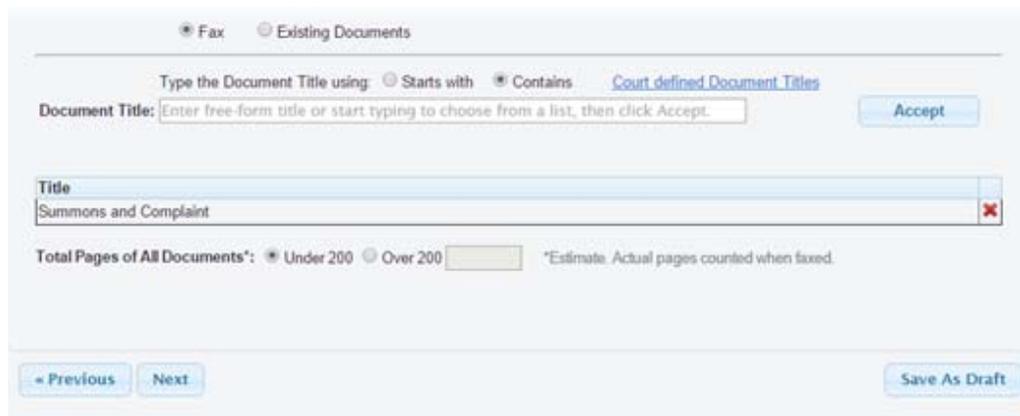
To upload documents, enter the title of the document you wish to upload in the Document Title field and click the 'Attach File...' button to upload your document(s).

Note: as you type in the Document Title field, the application will dynamically display titles that match your input. You may pick from the list provided or type your Document Title free form.



Each document is recommended to be uploaded individually. Please repeat the process as many times as you need until all your documents are uploaded, e.g., Summons, Complaint, Civil Case Cover Sheet, Proof of Service, etc.

Or select the “Fax” option and enter the title of the document you wish to fax in the Document Title field. Please estimate total pages of all documents.



Or select “Existing Documents” and you can select document(s) you have already uploaded on case. You have the option to view and the select which document(s) you would like to use for this order.



7 When uploaded correctly, the heading “**(Document Required)**” will be changed to “Document Submitted.”

Repeat the process until all entity names show “Document Submitted.”

Click on “**Next.**”

Upload Fax
Click on Party Name below to add Documents if required

Documents for Robert Monroe - Individual (Document submitted)

Documents for Robert's Pool Cleaning Service - Fictitious (Document submitted)

« Previous Next Save As Draft

8 Click on the entity’s name to open the address field.

Click on Party Name below to add Serve Info if required

Robert Monroe - Individual (Address required)

Robert's Pool Cleaning Service - Fictitious (Address required)

« Previous Next Save As Draft

Select the Service Level, Address Type and the Address of where you would like to serve the documents.

Once the address is provided, click on the  to load the address.

Click on Party Name below to add Serve Info if required

Robert Monroe - Individual (Address required)

Service Level*	Address Type*	Address*			
5 Day	Select...	Address	City	CA	Zip

Next Day
Same Day
Time: Dept/Div:

Advance Witness Fees: Yes No

Proof: File Notarize

Special Instructions: Please include any phone numbers and/or descriptions.

Robert's Pool Cleaning Service - Fictitious (Address required)

« Previous Next Save As Draft

When appropriate you can enter hearing date/time and dept/div.

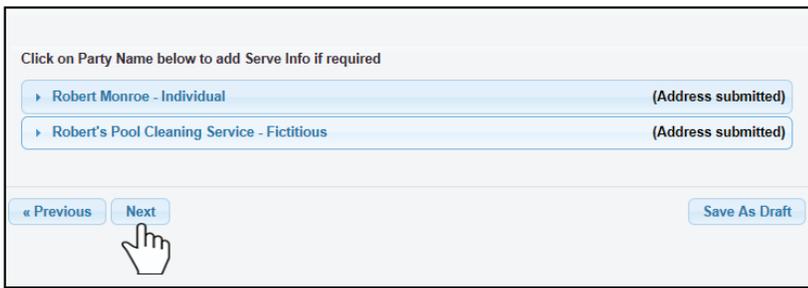
If you would like us to advance witness fees, select “**Yes.**”

If you would like to file or notarize the Proof of Service (Affidavit of Service,) checkmark the “**File**” or “**Notarize**” box of the Proof section (additional fee will apply.)



Please indicate in “special instruction” any information that will help us with getting the party served.

When the address is entered correctly, the heading “**(Address Required)**” will be changed to “Address Submitted.” Repeat the process until all entity names show “Address Submitted.”



Click on “**Next.**”

- 9 Select the best option as to when you would like the documents attempted for service. Select each name you would like to notify of status updates.



- 10 If you are sending the documents via FAX or Mail, click on "**Print Routing Pages.**" Include the routing page, to use as the cover page, along with your documents . The FAX number will be Located on the top of the page.

If mailing, contact our customer support who will provide you with the address of where you will need to mail your documents.

