

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."

The screenshot shows the 'Order Details' form with the following fields and options:

- Select number of Party(s) to Serve:** 1 (for more than 15 Party(s), please place multiple orders)
- Party(s) To Serve:** John Smith
- Capacity:** Individual
- Registered Agent:** [Empty field]
- Enter Business Name or Address:** 734 West Lee Drive, San Bernardino, CA, USA
- Type:** Residential
- Time Zone:** Select...
- Hearing Date/Time:** [Empty field] Dept/Div: [Empty field]
- Advance Witness Fees:** Yes No
- Proof:** File Notarize
- Special Instructions:** Please include any phone numbers and/or descriptions.

 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. **Jurisdictions are located using the city of the jurisdiction not the county**

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.



 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.

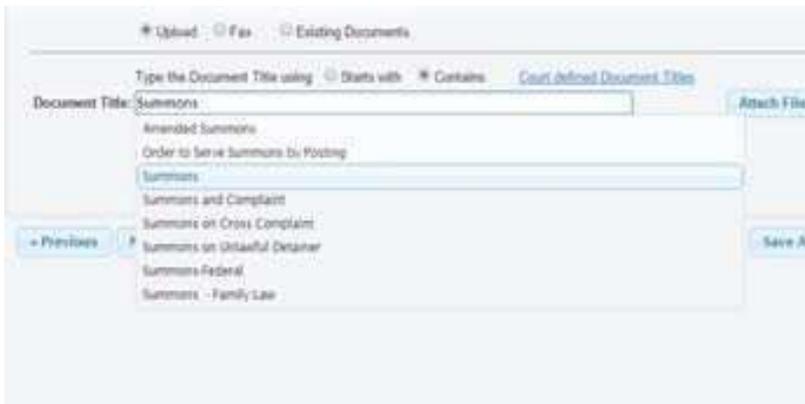


On the Documents Tab, there are 3 options to submit documentation necessary to complete your Process Serve order:

- **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.

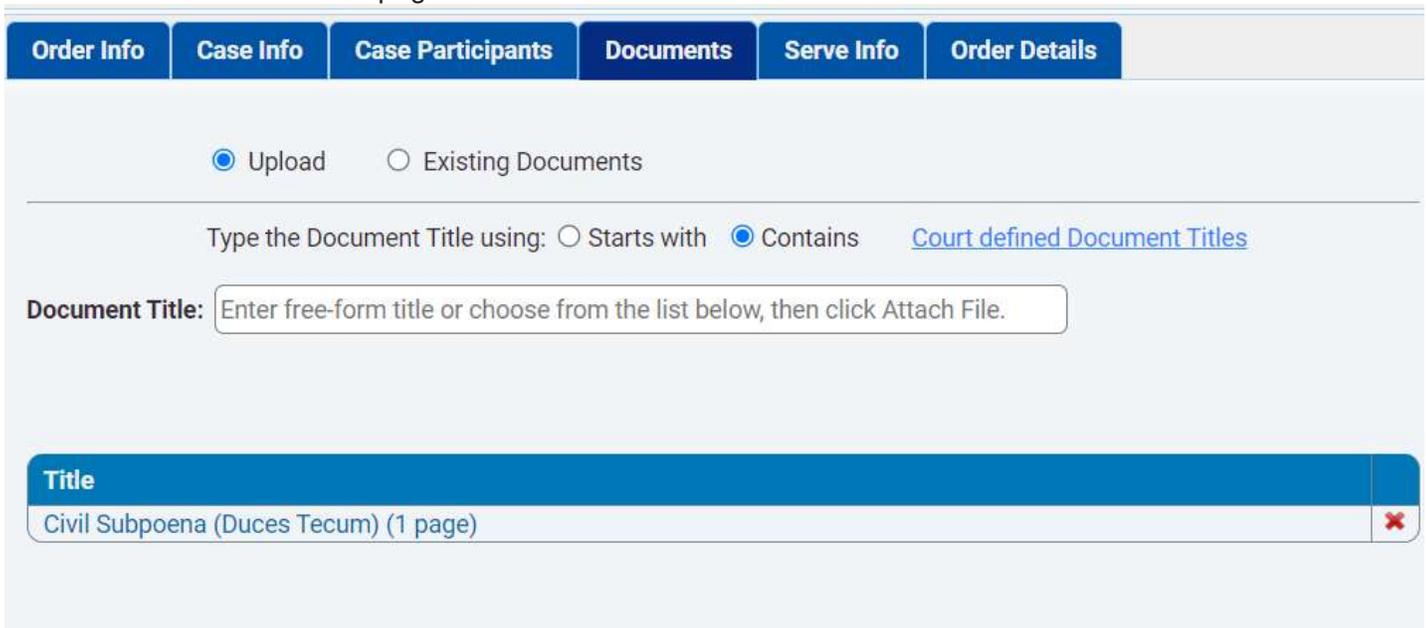
To upload documents, enter the title of the document you wish to upload in the Document Title field and click the ‘Attach File...’ button to upload your document(s).

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.**”



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



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.



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.

Order Info | Case Info | Case Participants | Documents | **Serve Info** | Order Details

When would you like this attempted?

- Attempt by **Tomorrow 12:00 PM** for \$265.00 (On Demand) *
- Attempt by **Tomorrow 10:00 PM** for \$165.00 (Urgent) *
- Attempt by **Monday 10:00 PM** for \$125.00 (Priority) *
- Attempt by **Friday, January 26 10:00 PM** for \$85.00 (Standard) *

* Prices listed and service times displayed are per address attempted and only an estimate based on the information provided. If you need your order processed sooner than the times listed above, please call us at (800) 366-5445.

Fee Summary:

| Description | Amount | Total |
|------------------------|--------|---------------|
| Payment Processing Fee | | \$0.00 |
| Order Total | | \$0.00 |

Payment Method: No Payment method found ▼

- 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.

