

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 Type the name of the Party to be served, select capacity, and enter registered agent (if known.)

Select the Address Type and provide the address of where you would like the documents served.

The screenshot shows the 'Order Info' tab in the customer portal. It includes a dropdown for 'Select number of Party(s) to Serve' (set to 1), a table for 'Party(s) To Serve\*' with columns for 'Party(s) To Serve\*', 'Capacity\*', and 'Registered Agent', and a table for 'Enter Business Name or Address\*' with columns for 'Enter Business Name or Address\*' and 'Type'. Below these are fields for 'Time Zone:', 'Hearing Date/Time:', 'Advance Witness Fees:', 'Proof:', and 'Special Instructions:'.

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 charges apply.)

Proof:  File  Notarize (Additional fee will apply)

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

Click on “**Next.**”

- 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.

Click on “**Next.**”

Case Number: bc10555505 - Kline, Larry v. Lotus Inc.  
 Jurisdiction: Stanley Mosk Central Courthouse - 111 N Hill St., Los Angeles  
 Case Title: Kline, Larry v. Lotus Inc.

Proof of Service Information

Attorney of Record: David Saldana  
 Firm Name: Joe Test 23 Account  
 Address: 312 W. 2nd Street, Suite 1006  
 City/State/Zip: Los Angeles CA 90012  
 Phone: (800) 366-5445  
 Check here to override name on Proof of Service

Previous Next Save As Draft

Case Number: Not Applicable  
 Check here if you do not have a Case Number.

Proof of Service Information

Attorney of Record: Select  
 Firm Name: Joe Test 23 Account  
 Address: 312 W. 2nd Street, Suite 1006  
 City/State/Zip: Los Angeles CA 90012  
 Phone: (800) 366-5445  
 Check here to override name on Proof of Service

Previous Next Save As Draft

 If you would like a different name to appear on header of proof then select “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**”, based on how your account was set up, 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.**”

**5** 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.

Upload    Fax    Existing Documents

Type the Document Title using:  Starts with    Contains   [Court defined Document Titles](#)

Document Title:

    

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.

Upload    Existing Documents

Type the Document Title using:  Starts with    Contains   [Court defined Document Titles](#)

Document Title:

Title
Civil Subpoena (Duces Tecum) (1 page) <input type="button" value="X"/>

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.

Order #	Title	Date Uploaded	Action	Select
1108525	Summons and Complaint	Oct 16, 2015	<a href="#">View</a>	<input type="checkbox"/>
1108525	1108525-ConformedCopy.pdf	Oct 16, 2015	<a href="#">View</a>	<input type="checkbox"/>
1008766-01	Civil Subpoena	Aug 03, 2014	<a href="#">View</a>	<input type="checkbox"/>

Show 20 entries   Showing 1 to 3 of 3 entries   [First](#)   [Previous](#)   1   [Next](#)   [Last](#)

 

    

Click “**Next**.”

6 Verify that the address to be attempted is correct.

Click on “Next.”

The screenshot shows the 'Serve Info' tab of a web application. At the top, there are navigation tabs: Order Info, Case Info, Case Participants, Documents, **Serve Info**, and Order Details. Below the tabs, the user's name 'John Smith - Individual' is displayed. The main form area is titled 'Enter Business Name or Address\*'. It contains a text input field with the address '734 W Lee Dr, San Bernardino, Ca 92405', a dropdown menu for 'Type' set to 'Residential', and a small edit/delete icon. Below this is another empty text input field for the business name or address. Further down, there are several sections: 'Time Zone:' with a dropdown set to 'Pacific Standard Time'; 'Hearing Date/Time:' with an empty text field and 'Dept/Div:' with another empty text field; 'Advance Witness Fees:' with radio buttons for 'Yes' and 'No' (the 'No' option is selected); 'Proof:' with checkboxes for 'File' and 'Notarize'; and 'Special Instructions:' with a text area containing the placeholder text 'Please include any phone numbers and/or descriptions.'

7 Select the best option as to when you would like the document(s) attempted for service. Select each name you would like to notify of status updates.

The screenshot shows the 'Serve Info' tab with the 'Order Details' sub-tab selected. A section titled 'When would you like this attempted?' is expanded, showing four radio button options for service attempt times and costs:
 

- 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) \*

 Below these options is a disclaimer: '\* 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.'
   
 A 'Fee Summary:' section contains a table:
 

Description	Amount	Total
Payment Processing Fee		\$0.00
<b>Order Total</b>		<b>\$0.00</b>

 At the bottom, there is a 'Payment Method:' dropdown menu currently displaying 'No Payment method found'.

- 8 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.

