

---

# TrueFiling™

---

User Guide –  
Settings, Notifications  
and Payment Accounts

---

ImageSoft, Inc.

---



## Table of Contents

Copyright .....	1
Favorites .....	2
Adding a Case to your Favorites .....	2
Removing a Case Favorite from the Case Details page .....	2
Adding a Court to your Favorites .....	3
Viewing your Favorites .....	3
Removing a Case Favorite through the Favorites Page.....	4
Settings .....	5
My Settings .....	5
Changing your Password .....	5
Setting your Default Page .....	6
Notifications .....	7
Setting Preferences .....	7
Understanding Notification Messages .....	7
Your Firm’s Settings .....	11
Firm Name .....	12
Time Zone .....	12
Notification Email .....	12
Servicing Email.....	12
Payment Account Sharing .....	12
Client Matter Number .....	12
Main Office Address .....	12
Payment Accounts .....	13
Creating a New Account .....	13
Deleting a Payment Account .....	14
Viewing Payment History .....	15
Creating a Receipt PDF .....	16
Creating a CSV File.....	16
Viewing Firm and Individual Activities .....	17
Viewing your TrueFiling Activities .....	17
Viewing your Firm’s Filing History.....	17

## Copyright

© 2014 ImageSoft, Inc. All rights reserved.

If this guide is distributed with software that includes an end user agreement, this guide is furnished under license and may be used or copied only in accordance with the terms of that license. Except as permitted by any such license, no part of this guide may be reproduced, stored in a retrieval system, or transmitted in any form or by any means (electronic, mechanical, photocopying, recording, or otherwise), or for any purpose without the express written permission of ImageSoft, Inc.

This guide is provided only to inform the user and is subject to change without notice. ImageSoft, Inc. assumes no responsibility or liability for any errors that may exist within this document.

If ImageSoft, Inc. and you have entered into a nondisclosure agreement, then this document or accompanying materials provided by ImageSoft, Inc. contains certain information that is confidential information of ImageSoft, Inc. and which may be used or copied only according to the terms of such nondisclosure agreement.

## Favorites

The Favorites page lists all frequently accessed cases and courts. Cases and courts must be manually added as favorites in order to display on the Favorites page.

### Adding a Case to your Favorites

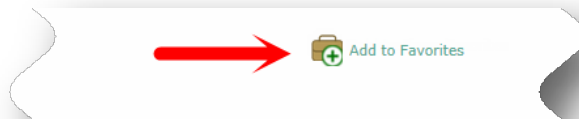
To locate a case and add it to your Favorites:

1. Launch the appropriate Case Details page.

---

You can perform a case search, if needed, and select the Case Number from the search results to launch the Case Details page.

---

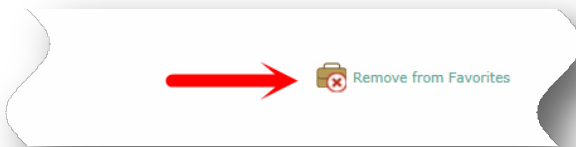


2. Click the **Add to Favorites** link to add this case to the list of your firm's favorite cases.

The Case Details page is refreshed.

### Removing a Case Favorite from the Case Details page

When a case is added to your favorites list, the **Add to Favorites** link on the Case Details page is replaced with **Remove from Favorites**.



Click the **Remove from Favorites** option if you want to remove the case as a favorite.

You can also remove a case as a favorite through the Favorites page. See *Viewing your Favorites* later in this section.

## Adding a Court to your Favorites

Only a firm administrator can add a court as a favorite. Contact your firm's TrueFiling administrator if you need a specific court added as a favorite.

## Viewing your Favorites

To view your firm favorites:

1. Select **Main Pages >> Favorites** in the navigation pane (located on the left side of the page). Your firm's Favorites page is displayed.

The screenshot shows the 'Favorite Cases' section with two dropdown menus: 'All Courts' and 'Firm's Favorite Cases'. Below is a table of favorite cases for the 'MI 11th District' court. The table has columns for Case Number, Case Title, Case Opened, and Added By. Each row includes a 'Remove' link. Below the table is the 'Favorite Courts' section, which lists the 'MI 11th District Court' with a 'Remove' link.

	Case Number	Case Title	Case Opened	Added By	
MI 11th District	2011-008076-DM	GERAGHTY, SHARON M vs. GERAGHTY, SHAWN T	9/14/2009	manna@manna.com	Remove
	2011-008066-PH	BENAK, ARDELLA vs. RAMSEY, BRENDEN	1/3/2011	manna@manna.com	Remove
	2011-008069-PP	WHITTEN, KIMBERLY vs. KETTLER, DAWN RENEE	9/14/2009	manna@manna.com	Remove
	2011-008070-PP	SHAPTON, JUDITH vs. FRAZER, CARL MORLEY	9/14/2009	manna@manna.com	Remove

Court Name	
MI 11th District Court	Remove

There are two sections –Favorite Cases and Favorite Courts.

A Favorite Case is a case that has been specified by any member of your firm as a favorite. You can specify how you view the favorite cases:

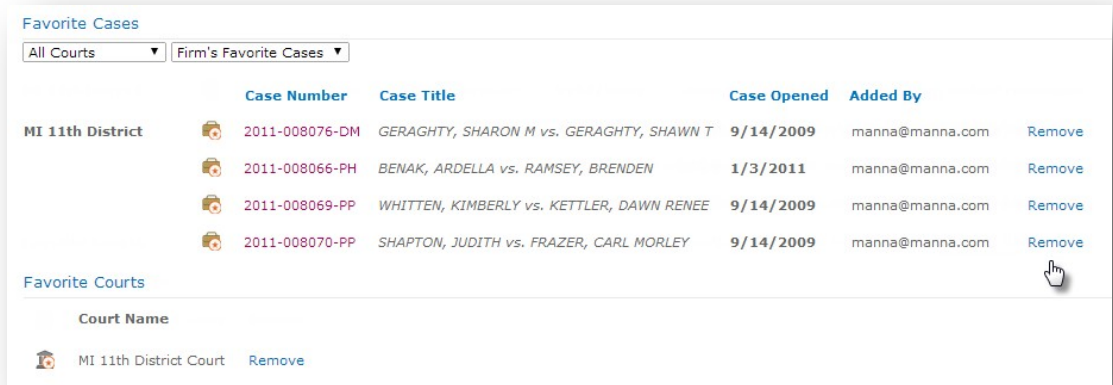
- When **All Courts** is specified in the drop-down list, the favorite cases of all firm members in all courts are displayed.
- To display only your favorite cases for all courts, select **My Favorite Cases** from the drop-down list.
- If you choose a specific court in the drop-down list, all favorite cases for all firm users in that court are displayed. You cannot display only your case favorites for a specific court.

The Favorite Courts section lists courts that have been specified by your firm's TrueFiling administrator as firm favorites on this page.

## Removing a Case Favorite through the Favorites Page

You can remove a favorite case through the Favorites page:

1. Select **Main Pages >> Favorites** in the navigation pane. Your firm's Favorites page is displayed.
2. Locate the case favorite to remove.



3. Click the appropriate **Remove** option.

The case will be removed as your favorite. If, however, that same case is identified as a favorite of another user, the case will still be listed as a Firm Favorite Case.

## Settings

The Settings section provides access to these pages:

- The Support page is used to contact TrueFiling support through email or phone, as well as grant support specialist access to your firm's site.
- The Contacts and Attorneys page is used to add contacts, attorneys, and self-represented filers to your firm. You can select some or all of the contacts and attorneys for document servicing for a case. Administrators can use this page to issue an invitation to join the firm's TrueFiling Law Firm site as a Login User and enable those users to submit filings.
- The My Settings page is used to change your password, change your default page, and select email notifications. See *My Settings* in this section for details on changing your password and specifying your TrueFiling default page. See *Notifications* in this section for details on specifying your email notification settings.
- The Payment Accounts page provides credit card information for the payment of filings and fees. See *Payment Accounts* later in this guide for details.
- The Firm Settings page is used by administrators to specify the Firm Name that is used within TrueFiling, set the time zone for the firm's TrueFiling website, specify the firm's notification email address, specify an email address that is copied for all servicing notifications, and indicate if a Client Matter Number is required for new filings. See *Your Firm's Settings* in this section.

## My Settings

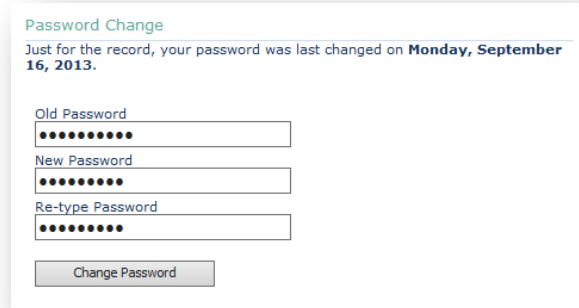
Access the My Settings page through the Settings option in the navigation pane. On this page you can change your password and establish preferences for your TrueFiling default page and email notifications. Details on changing your password and setting your default page are provided in the following section. Information on setting your email notification preferences is in *Notifications*.

### Changing your Password

You can reset your password from the Account Logon page, which may be required if you forget your password and are not able to log on.

You can also change your password while you are logged on to TrueFiling. To change your password:

1. Select **Settings >> My Settings** in the navigation pane.



The screenshot shows a 'Password Change' form. At the top, it says 'Just for the record, your password was last changed on Monday, September 16, 2013.' Below this are three input fields: 'Old Password', 'New Password', and 'Re-type Password'. Each field contains a series of dots representing masked text. At the bottom of the form is a 'Change Password' button.

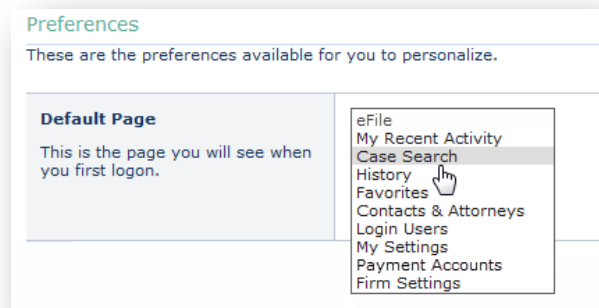
2. In the Password Change section, input your **Old Password**.
3. Input your **New Password**.
4. **Re-type Password** to confirm.
5. Click **Change Password**.

Your password has been changed. You must use your new password the next time you log on to TrueFiling.

## Setting your Default Page

Your default page is the first page that displays when you log on to TrueFiling. To specify which page will display:

1. Access **Settings >> My Settings** in the navigation pane.



The screenshot shows the 'Preferences' section. It starts with the text 'These are the preferences available for you to personalize.' Below this is a 'Default Page' section. On the left, it says 'This is the page you will see when you first logon.' On the right, there is a drop-down menu with a list of options: eFile, My Recent Activity, Case Search (highlighted), History, Favorites, Contacts & Attorneys, Login Users, My Settings, Payment Accounts, and Firm Settings. A mouse cursor is pointing at the 'Case Search' option.

2. In the Preferences section, click the **Default Page** field drop-down arrow.
3. Select the appropriate page.
4. Click **Save Preferences**. The next time you log on to TrueFiling, the selected page will display.



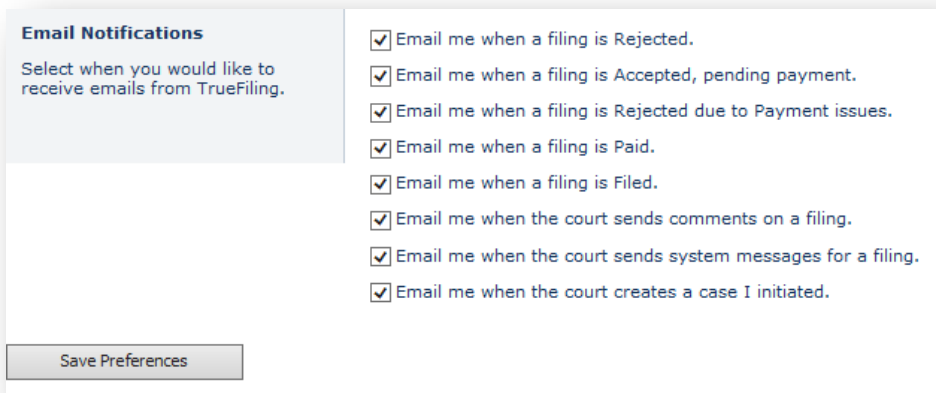
## Notifications

All filings undergo a review and acceptance process before being officially filed or rejected by the clerk's office or Court. During this process, you can opt to receive notifications whenever the filing's status changes or activity is performed by the clerk's office or the Court.

### Setting Preferences

To change the notification preferences, access **Settings >> My Settings** in the navigation pane.

On the page displayed, locate the Preferences section.



**Email Notifications**  
Select when you would like to receive emails from TrueFiling.

- Email me when a filing is Rejected.
- Email me when a filing is Accepted, pending payment.
- Email me when a filing is Rejected due to Payment issues.
- Email me when a filing is Paid.
- Email me when a filing is Filed.
- Email me when the court sends comments on a filing.
- Email me when the court sends system messages for a filing.
- Email me when the court creates a case I initiated.

Save Preferences

By default, these settings are unselected. Therefore, you will not receive any email notifications when a filing's status changes, including rejection notifications for improper filings or for payment failure, unless you select the required notifications.

### Understanding Notification Messages

---

NOTE: Every filing should be considered NOT FILED until the Court has docketed the filing, and an official copy is available for you to download

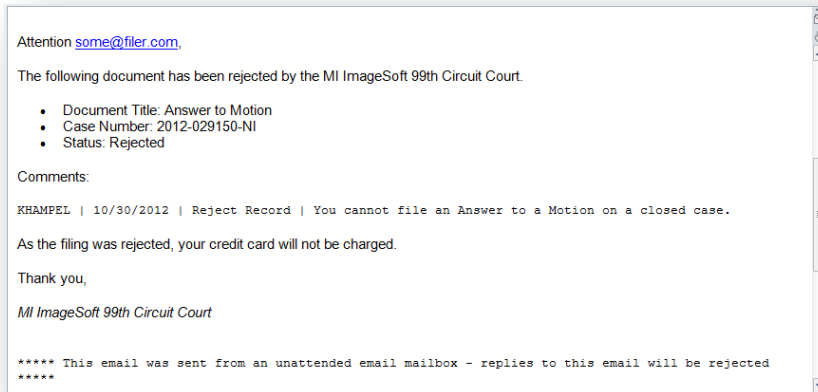
---

Use the following to determine the level of notifications appropriate for you. An email notification should not be construed as validation that a filing has been officially filed.

- Email me when a filing is Rejected

When this setting is enabled, you will receive an email whenever a filing is rejected by the clerk or the Court. The email message will contain information regarding the nature of the rejection.

A rejection notification email for a filing will resemble.



This notification is an example and is not guaranteed to be the same for every court. For instance, some courts may elect to charge the credit card for some rejected filings as the Court performed required actions but ultimately did not docket the filing.

---

NOTE: The filing should be considered NOT FILED, and you will need to create a new filing with the appropriate changes and re-submit.

---

- Email me when a filing is Accepted, pending payment

When this setting is enabled, you will receive an email whenever a filing has been accepted by the clerk or the Court but is waiting to be processed for payment by TrueFiling.

---

NOTE: The filing should be considered NOT FILED as the Court has not yet docketed this filing. However, you are not required to perform any further actions as the filing is still in progress and awaits payment and official docketing.

---

- Email me when a filing is Rejected due to payment issues

When this setting is enabled, you will receive an email whenever TrueFiling fails to authorize the payment for a filing that was accepted by the Court.

---

NOTE: The filing should be considered NOT FILED as the Court has not yet docketed this filing.

---

There are many reasons for a failed payment, including but not limited to:

- Expired credit card
- Closed account
- Insufficient funds
- Credit card deleted from TrueFiling by a firm administrator

Although there was nothing wrong with the filing with respect to the clerk, you must create a new filing and re-submit using a valid credit card.

- Email me when a filing is Paid

When this setting is enabled, you will receive an email when a filing has been accepted by the clerk or the Court and has been authorized for payment but is waiting to be officially filed by the clerk and Court.

---

NOTE: The filing should be considered NOT FILED as the Court has not yet docketed the filing. However, there is no further action you need to perform as the filing is still in progress and awaits official docketing.

---

- Email me when a filing is Filed

When this setting is enabled, you will receive an email when a filing has been docketed by the clerk and payment has been processed. An official copy of the filing is available for download by accessing the Filing History through the Bundle Details page.

- Email me when the Court sends comments on a filing

When this setting is enabled, you will receive an email whenever the clerk updates the status or adds comments for a filing. These messages are typically produced by a clerk with the intent of communicating with the filer.

Opting in for this level of messaging will override any of the individual status changes listed above. Therefore, enabling this setting may provide you with the status updates listed above such as paid, rejected, and filed regardless of the specific setting selections. However, you will never receive two messages for the same correspondence from the Court based on the settings selected.

---

NOTE: Every filing should be considered NOT FILED until the Court has docketed the filing, and an official copy is available for you to download by accessing the Filing History through the Bundle Details page.

---

- Email me when the Court sends system messages for a filing

When this setting is enabled, you will receive an email whenever the clerk or the Court's backend system updates the filing's status. These messages are typically system generated and not produced by a Court employee.

Opting in for this level of messaging will override any of the individual status changes listed above. Therefore, enabling this setting may provide you with the status updates listed above such as paid, rejected, and filed regardless of the specific setting selections. However, you will never receive two messages for the same correspondence from the Court based on the settings selected.

---

NOTE: Every filing should be considered NOT FILED until the Court has docketed the filing, and an official copy is available for you to download by accessing the Filing History through the Bundle Details page.

---

- Email me when the Court creates a case I initiated

When this setting is enabled, you will receive an email when a case initiating filing has been accepted by the Court, and a case number is available.

## Your Firm's Settings

Select **Settings » Firm Settings** in the navigation pane to view your firm's TrueFiling settings.

NOTE: Firm settings are set and managed by administrative users. These settings display as read-only to non-administrative users. Refer to the *TrueFiling Administrator Guide* for details on modifying these settings.

**Firm Settings**

---

<p><b>Firm Name</b></p> <p>This is the name of the firm displayed throughout the website. Note: Firm name will not be refreshed for any existing contacts listed as service recipients.</p>	Mayernik Test Firm
<p><b>Time Zone</b></p> <p>Select time zone for the TrueFiling website for your firm. All times displayed will default to this time zone.</p>	(UTC-05:00) Eastern Time (US and Canada) <span style="float: right;">V</span>
<p><b>Notification Email</b></p> <p>Enter an email address to be copied on all email notifications sent to filers. This email address will only be used when the filer has elected to be notified and is being emailed.</p>	ldmayernik@email.com
<p><b>Servicing Email</b></p> <p>Enter an email address to be copied on all servicing notifications sent to contacts associated with my firm. This email address will only be used when a servicing email is sent to a member of this firm.</p>	ldmayernike@email.com
<p><b>Payment Account Sharing</b></p> <p>Select whether all users will share payment accounts or will each use their own individual payment accounts.</p>	<p><input checked="" type="radio"/> Shared - All payment accounts accessible to all firm users</p> <p><input type="radio"/> Not Shared - Each user must enter their own payment account information</p>
<p><b>Matter Number Required</b></p> <p>Please choose if you would like to make the client Matter Number required when filing out a new filing.</p>	<p><input checked="" type="radio"/> Yes</p> <p><input type="radio"/> No</p>
<p><b>Main Office Address</b></p>	<p>Address <span style="float: right;">Address Line 2</span></p> <p>2590 W. Beaver - Suite 100</p> <hr/> <p>City <span style="float: right;">State</span></p> <p>Southfield <span style="float: right;">Michigan MI 034</span></p> <hr/> <p>Email Address</p> <p>@imagesofinc.com</p> <hr/> <p>Website</p> <p>http://www.imagesofinc.com</p> <hr/> <p>Phone Number <span style="float: right;">Fax Number</span></p> <p>8-8-8100</p>

---

[Save Settings](#)

## Firm Name

Specify how your firm's name is to display throughout the TrueFiling site.

---

NOTE: Be aware that if the firm name is changed, it is not updated in the Contacts section on the Case Details page.

---

## Time Zone

Use the drop-down arrow and select the time zone to be used by the TrueFiling website for your firm. All times displayed in TrueFiling (for example, the Timestamps listed in a filing's history) default to the time zone specified.

## Notification Email

All TrueFiling email notifications sent to filers will be copied to the email addressed specified here.

## Servicing Email

All servicing emails sent to a member of the firm will be copied to the email address specified here.

## Payment Account Sharing

Specify if all users can share all payment accounts or if they cannot share and must use their own payment account information.

## Client Matter Number

Specify if a Client Matter Number is required when a new filing is created.

## Main Office Address

Your firm's administrator specifies the following contact information for the firm:

- Address
- Email address
- Website (if any)
- Phone and fax numbers

---

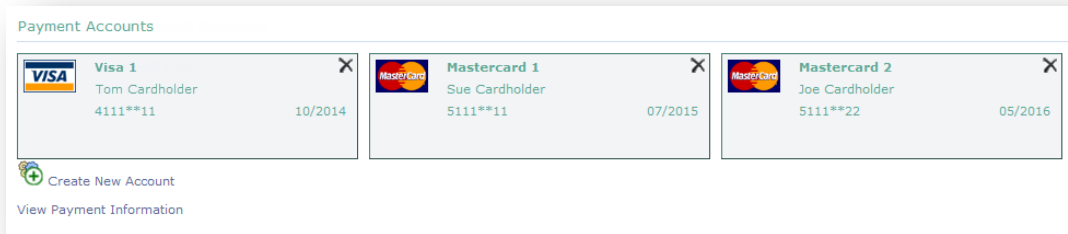
NOTE: The State specified in the firm's address will become the default state shown in the **State** field in all forms within TrueFiling. That is, whenever a TrueFiling form (for example adding a new attorney) requires a state to be specified, the **State** field is auto-filled with this default state in the form.

---

## Payment Accounts

You can manage the credit card accounts used for payment when your firm submits a bundle to the Court. You can also track your firm's payment history.

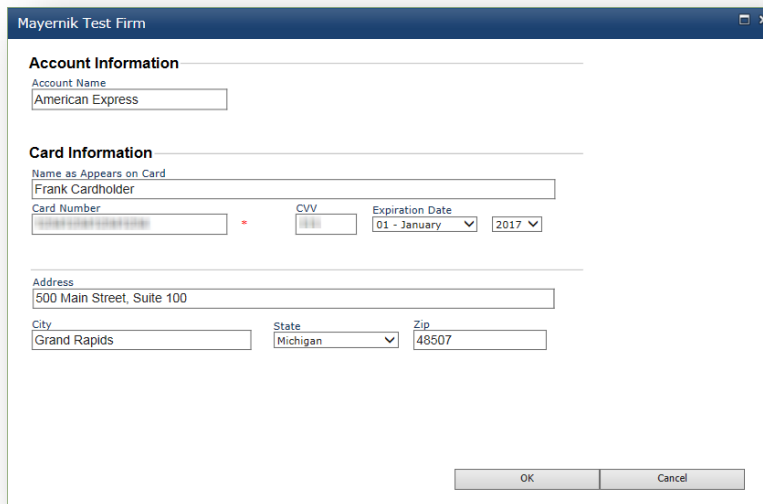
Select **Settings >> Payment Accounts** in the navigation pane. The Payment Accounts page is displayed.



## Creating a New Account

To create a new account:

1. Click **Create New Account** on the Payment Accounts page.



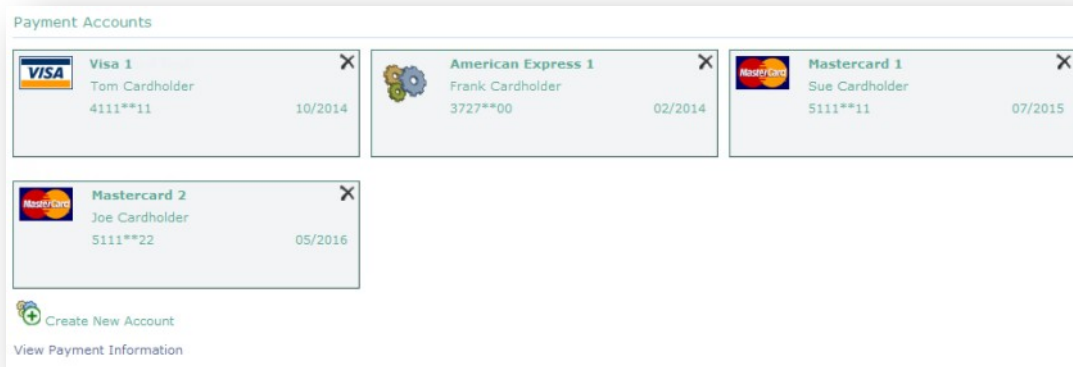
The screenshot shows a dialog window titled 'Mayernik Test Firm' with the following fields:

- Account Information:** Account Name: American Express
- Card Information:** Name as Appears on Card: Frank Cardholder; Card Number: [redacted]; CVV: [redacted]; Expiration Date: 01 - January 2017
- Address:** 500 Main Street, Suite 100; City: Grand Rapids; State: Michigan; Zip: 48507

Buttons: OK, Cancel

2. Input the Account Information and Card Information.
3. Click **OK** to complete and close the dialog window. The credit card will be validated for accuracy before being added as an account.

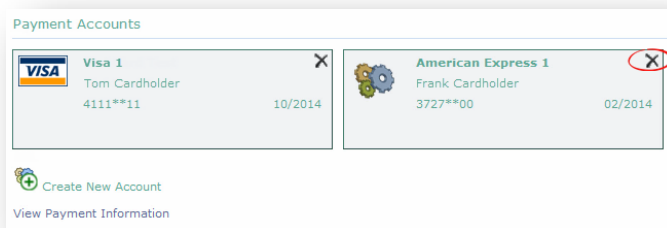
A placard for the new account is added to the Payment Accounts page.



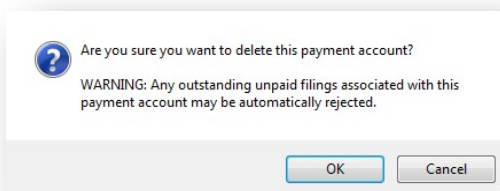
## Deleting a Payment Account

**NOTE:** This functionality is available only to Firm administrators.

1. Access the Payment Accounts page.



2. Locate the account to remove and click the **X** in the upper-right corner of the account placard. A confirmation dialog window is displayed.



3. Click **OK** to delete the account; click **Cancel** to cancel the operation.

**NOTE:** As noted in the confirmation dialog window, if you have any unpaid filings that were submitted with this credit card, the filings may be rejected if you delete the payment account.



## Viewing Payment History

You can view a comprehensive payment history for your firm for a specified time period, as well as print out receipts for selected transactions.

1. Select **Settings >> Payment Accounts** in the navigation pane to access the Payment Accounts page.
2. Click **View Payment Information**. The Payment History Report page is displayed.

3. Input both the start date (**Payment on or after**) and end date (**Payment on or before**).  
You can filter the payments that will be displayed based on **Matter Number** (optional).
4. Click **View Activity** on the Payment History Report page. The payment history is displayed.

Receipt Approval Code	Matter No.	Case No.	Attorney #	Description	Fee Waived	Payment Acct	Payment Date	Payment Id	Filing Title	Auth Fee	Record Id	Court Id
<input type="checkbox"/> (3a3c09a-2a6f-42e6-8deb-da9f354990d)	DAN-1	2011-028408-NI	P0001	BRIEF	False	Mastercard 1	1/15/2013 8:20:13 PM	63493878013524434040	BRIEF-20121024-9207-66ea76faf283	4.5	ca801823-c769-4c00-9207-66ea76faf283	MI ImageSoft 99th Circuit Court
<input type="checkbox"/> (56813d28-e40d-475d-8094-81cc3a089f2)	(none)	2011-028408-NI	P0001	ANSWER	False	Mastercard 1	1/15/2013 8:21:47 PM	63493878107180516340	ANSWER-20130115-634938780978143738	4.5	53ab89f-bf6c-4315-97ab-7826362c65d	MI ImageSoft 99th Circuit Court
<input type="checkbox"/> (aaf9e3ba-ef6f-4f45-9004-643bae9209d)	(none)	2011-002640-CK	P0001	ANSWER	False	Mastercard 1	1/15/2013 8:40:04 PM	63493879204650719037	This is a test document	4.5	33501d7-707b-4062-8ffc-4c3b9478d4c	MI ImageSoft 99th Circuit Court
<input type="checkbox"/> (f9b9844-2cee-445e-9c03-5ae28e9936d)	(none)	2011-002640-CK	P0001	BRIEF	False	Mastercard 1	2/10/2013 10:00:06 AM	63496087206469466649	BRIEF-20130210-63496087603476173	4.5	9879b5a0-20fa-4741-8176-938846a1688	MI ImageSoft 99th Circuit Court
<input checked="" type="checkbox"/> (09fd283-4df-489f-84e7-161eaf30d829)	1234-09	2011-002640-CK	P0001	AMENDED COMPLAINT	False	Mastercard 1	2/11/2013 1:35:02 PM	63498186502922143364	AMENDED COMPLAINT-20130211-634981862722206466	4.5	1d99e25e-ebfa-45a0-947a-1a9b1696636b	MI ImageSoft 99th Circuit Court
<input type="checkbox"/> ZERO DOLLAR TRANSACTION	123-44	2011-008159-DM	P0001	Miscellaneous	False	FEES WAIVED	6/25/2013 12:32:49 AM		Test2	0	838c298a-86a2-4a4a-a88f-02e930e1b39	MI ImageSoft 99th Circuit Court
<input type="checkbox"/> ZERO DOLLAR TRANSACTION	(none)	2011-071462-DM	P0001		False	NO FEES	9/16/2013 1:20:00 PM		NOTIONPREJUDGMENT-20130227-634669791172564139	0	63ed6ea-3ca4-4461-ae09-4bee75228611	MI ImageSoft 99th Circuit Court
<input type="checkbox"/> ZERO DOLLAR TRANSACTION	(none)	2011-071462-DM	P0001		False	NO FEES	9/16/2013 2:05:06 PM		NOTIONPREJUDGMENT-20130229-634661235208661179	0	40990981-26a4-434e-b119-2932c0751006	MI ImageSoft 99th Circuit Court
<input type="checkbox"/> ZERO DOLLAR TRANSACTION	(none)	2011-028408-NI	P0001		False	NO FEES	9/16/2013 2:15:00 PM		CasePurchaseFileListRequest-20130916-635149230218324902.xml	0	3d3fa1-laf1-484e-a055-641a3b699117	MI ImageSoft 99th Circuit Court

5. You can select payment information for a specific case by selecting a case number from the **Case(s)** drop-down list.

## Creating a Receipt PDF

To create a PDF file of selected transaction receipts.

1. After the Payment History Report is generated, select the check box in the **Receipt** column to print a receipt for a transaction.
2. Click **Create Receipt PDF**. A dialog window prompts you to open or save the document.

**Open** – the document is opened in a separate window.

**Save: Save** – the document is saved in the Downloads folder; a default file name is created.

**Save As** – a Save As dialog window is displayed where you can specify the file name and location.

**Save and open** – the document is saved in the Downloads folder and is opened in a separate window.

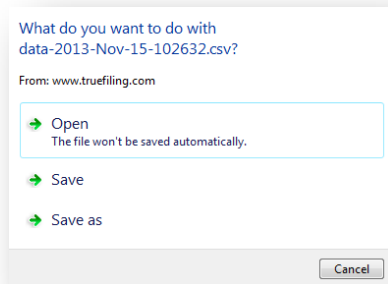
**Cancel** – cancel the operation.

3. Specify how you want to access the PDF file.

## Creating a CSV File

You can generate a CSV file that contains the transaction data.

1. After the Payment History Report has generated, click **Create csv file** on the Payment History Report page. A dialog window prompts you to open or save the file.



**Open** – the document launches in Microsoft Excel in a separate window.

**Save** – the file is saved to the local system's Downloads folder; a default file name is created.

**Save as** – a Save As dialog window is displayed where you can specify the file name and location.

2. Specify how you want to access the file; click **Cancel** to cancel the operation.

## Viewing Firm and Individual Activities

### Viewing your TrueFiling Activities

You can view your recent TrueFiling activity. Summary information is available for cases, filings, and user updates. Select **Main Pages >> My Recent Activity** in the navigation pane.

### Viewing your Firm's Filing History

You can view information on each filing made in your firm. Select **Main Pages >> History** in the navigation pane. A scrollable page lists the following—organized by filing status—for each filing filed through your firm:

- Bundle name
- Filing Title
- Case number
- Court
- Date submitted
- Case title
- Last activity date