How to Place a Process Serving Order for Multiple Entities

Serve documents on two or more people or businesses in one order. You list the parties and the case details, then add documents and a service address for each party.

Start here

LOG IN TO THE PORTAL →

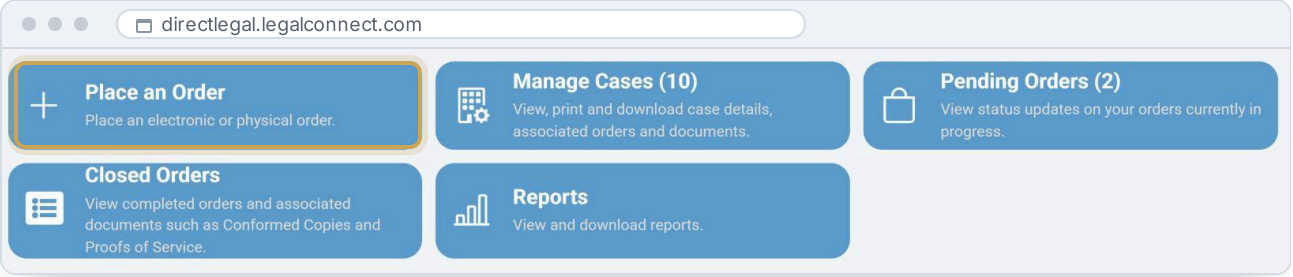
Or go to **directlegal.legalconnect.com** and log in with your email address and password. Use a current version of Chrome, Edge, Firefox or Safari. New to the portal? See our **Creating a New Account** guide.

What you will need

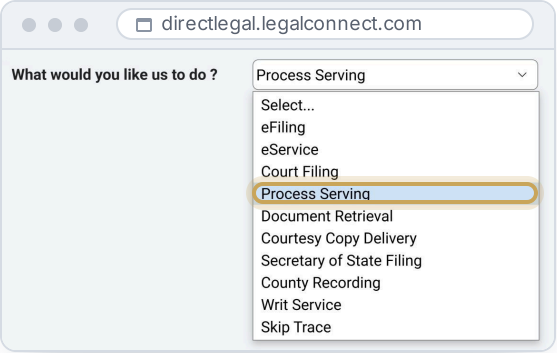
- The name of each person or business to be served
- The address where each one should be served
- The case number and court, if you have them
- Your documents, as one file or one file per document
- Your billing code, if your firm uses one

1 Click Place an Order

Log in to your account. On your dashboard, click **Place an Order**.



2 Choose Process Serving

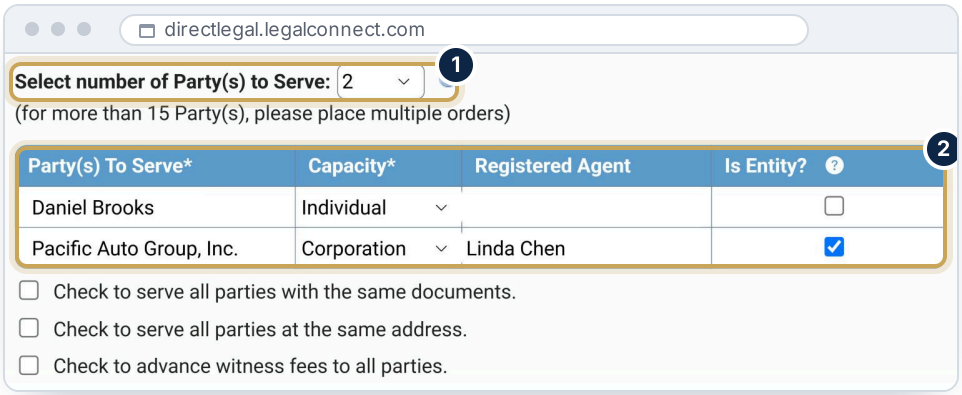


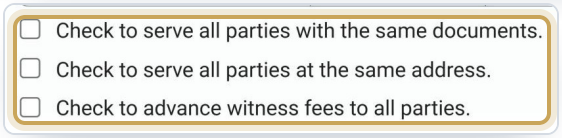
In **What would you like us to do?**, select **Process Serving**.

3 Enter the parties to be served

In **Select number of Party(s) to Serve**, choose how many people or businesses you need served. For more than 15, place more than one order.

For each party, type the name under **Party(s) To Serve**, choose their **Capacity**, such as Individual or Corporation, and enter the **Registered Agent** if you know it. Check **Is Entity?** for a business or other entity.





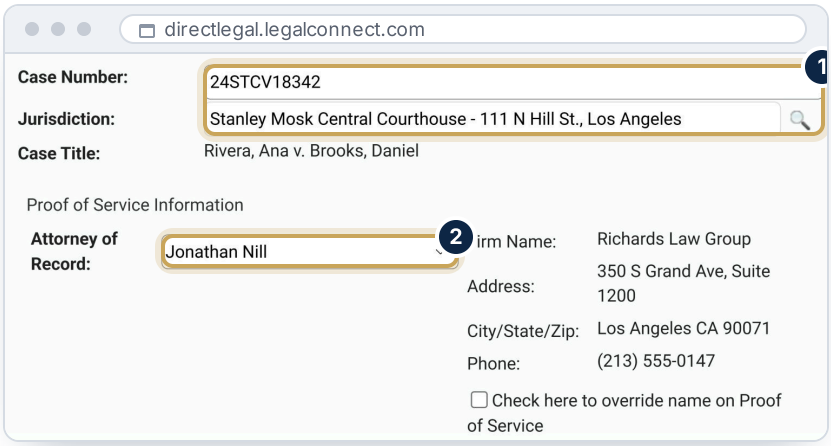
Save time: If every party will be served with the same documents, or at the same address, check the matching box. With the same documents, you add them once instead of for each party. You can also choose to advance witness fees for all parties.

Click **Next**.

4 Enter the case information

On the **Case Info** tab, type the **Case Number**. If the case is already in your account, choose it from the list and the **Jurisdiction** and **Case Title** fill in for you. For a case that is new to your account, press Enter. Then, in **Jurisdiction**, type the city where the court is located and choose the court from the list.

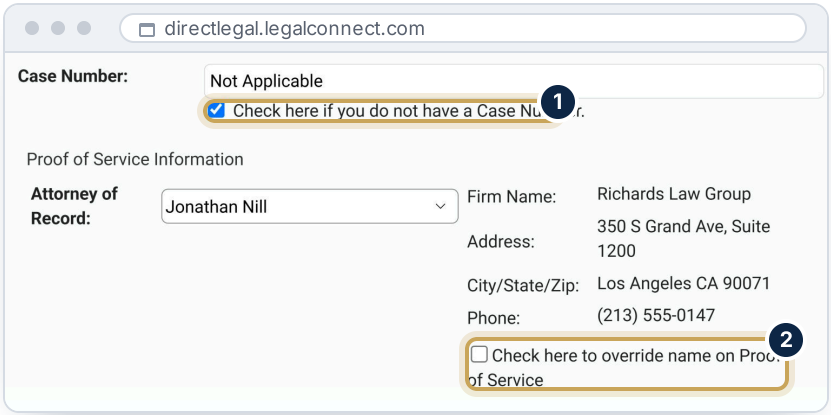
Choose the **Attorney of Record**. The firm details for that attorney appear next to the name. Click **Next**.



4A No case number, or a different name on the proof

If you don't have a case number yet, check **Check here if you do not have a Case Number**. The case number shows **Not Applicable**. Then choose the **Attorney of Record**.

To show a different name in the header of the proof of service, check **Check here to override name on Proof of Service**. The firm name, address and phone fields open so you can change them. Click **Next**.



5 Add the case participants

Add the lead parties in the case, such as the plaintiff and the defendant. You only need the lead parties. Parties already on the case are listed for you. Click **Add Party(s)**, then choose the role, enter the name, and say whether the party is your lead client. Click **Save**.

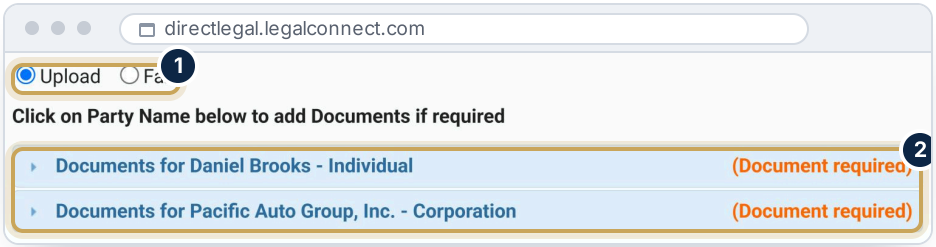


> **Billing code:** When you mark a party as your client, you may be asked for a **Billing Code**, depending on how your account is set up. This is your firm's internal billing or client matter number for the case.

Click **Next**.

6 Add documents for each party

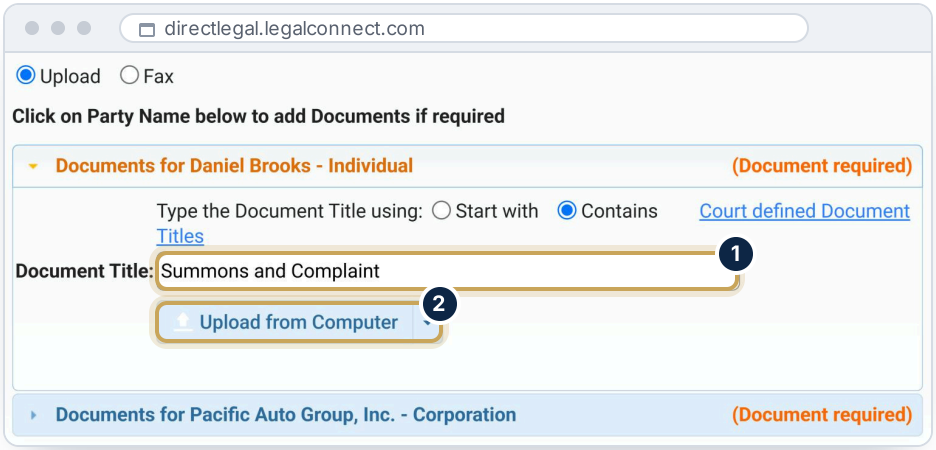
On the **Documents** tab, choose **Upload** to send files from your computer or **Fax** to fax them to us. Each party is listed with **(Document required)**. Click a party's name to open its document fields.



If you checked **Check to serve all parties with the same documents** on the **Order Info** tab, the parties are not listed here. You add the documents once for everyone.

6A Add the documents

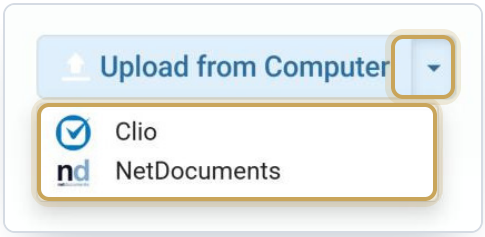
Start typing the **Document Title** and choose it from the list, or type your own title. Choose **Starts with** or **Contains** to change how the list is searched. Then click **Upload from Computer** and choose the file. Each document you attach is listed under **Title**.



One file or several: You can upload each document as its own file, such as the Summons, Complaint and Civil Case Cover Sheet, or combine them into one file. Repeat until every document is attached.

Faxing your documents: Choose **Fax** at the top of the tab. For each party, type the title of each document you will fax and click **Accept**. Then choose the total number of pages for all documents. Step 9 explains the fax cover page.

6B Or upload from Clio or NetDocuments

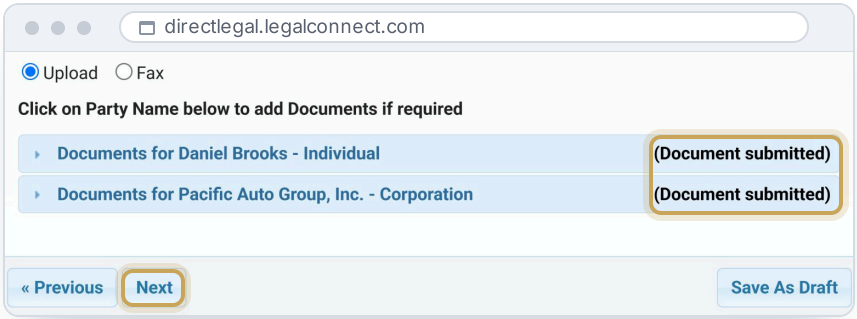


If your firm keeps its files in **Clio** or **NetDocuments**, you can attach the document from there instead of from your computer. Click the arrow next to **Upload from Computer** and choose **Clio** or **NetDocuments**. Sign in if asked, then pick the file.

For the full steps, see Using Clio with Direct Legal Support or Using NetDocuments with Direct Legal Support.

6C Repeat for every party

When a party's documents are added, **(Document required)** changes to **(Document submitted)**. Repeat steps 6 and 6A until every party shows Document submitted, then click **Next**.



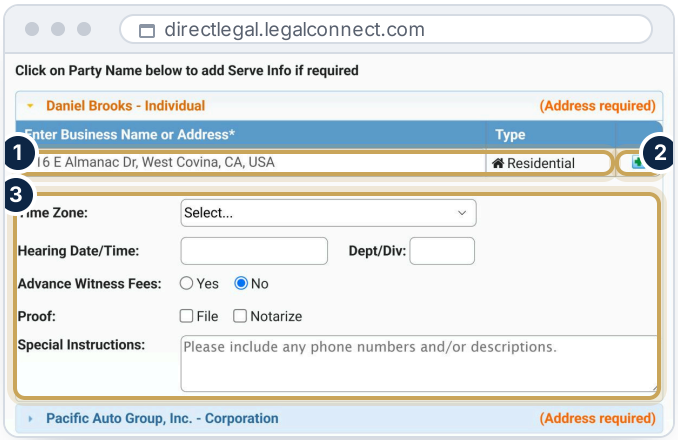
7 Add a service address for each party

On the **Serve Info** tab, each party is listed with **(Address required)**. Click a party's name to open the address fields.



7A Enter the address

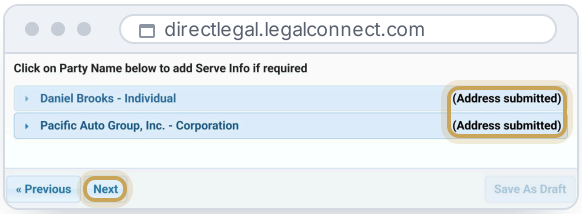
In **Enter Business Name or Address**, start typing the address where the party should be served and choose it from the list. The address **Type**, such as Residential or Business, is filled in for you. Then click the green **+** button to add the address.



Fill in the other fields if they apply:

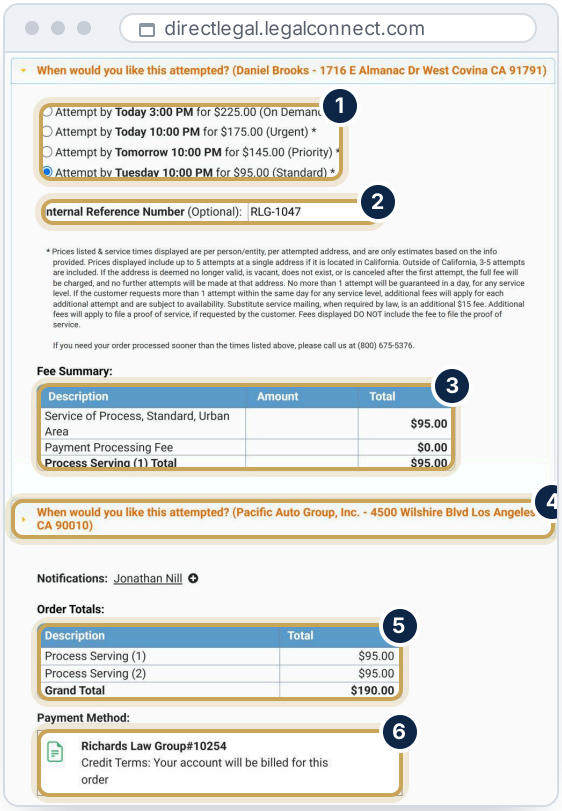
- If the documents have a hearing, choose the **Time Zone** and enter the **Hearing Date/Time** and **Dept/Div**.
- To have us advance witness fees, choose **Yes** next to **Advance Witness Fees**.
- To have us file the proof of service or have it notarized, check **File** or **Notarize** next to **Proof**. Additional fees apply.
- In **Special Instructions**, tell us anything that will help us serve the party, such as phone numbers or a description of the person.

7B Repeat for every party



When an address is added, **(Address required)** changes to **(Address submitted)**. Repeat steps 7 and 7A until every party shows Address submitted, then click **Next**.

8 Choose when to attempt service



On the **Order Details** tab, each party has its own section. Click a party's heading to open it (4).

Choose a service level under **When would you like this attempted?** (1). The price of each level is shown next to it. If your firm tracks orders by its own number, enter it in **Internal Reference Number** (2). It is optional.

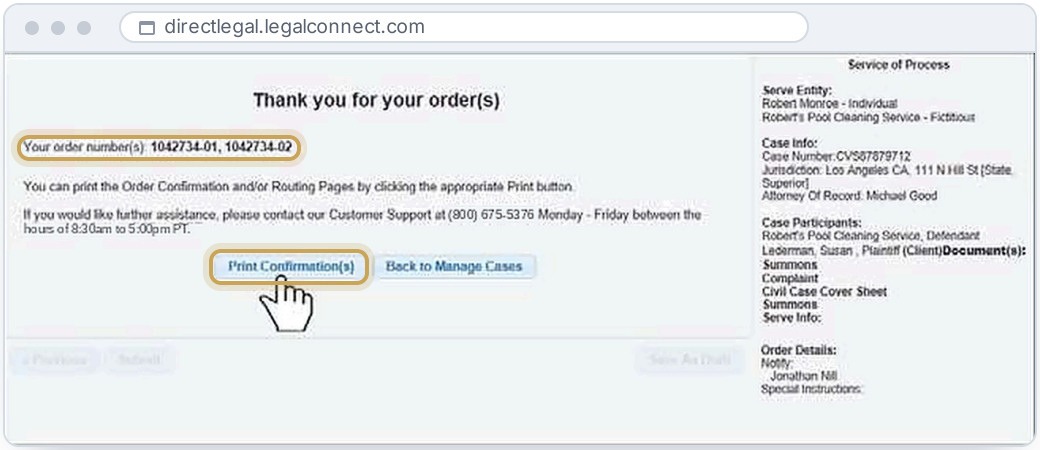
Each party's **Fee Summary** (3) shows the service fee, any **Payment Processing Fee** and the total for that party. Once you choose a service level for every party, **Order Totals** (5) shows each party's total and the **Grand Total**.

Check **Notifications** (click **+** to add someone) and the **Payment Method** (6). When you are ready, click **Submit**.

Prices and times: The prices and service times shown are estimates for each address attempted, based on the information you entered.

9 Get your confirmation

A confirmation appears with your order numbers. Click **Print Confirmation(s)** to print the order confirmation or routing pages.



> **Faxing your documents:** Print the routing page and send it with your documents as the cover page. The fax number is at the top of the routing page.

After you order

- Follow your orders under **Pending Orders** on your dashboard
- Find the proofs of service under **Closed Orders** once service is complete

Good to know

Serving just one party? See our guide **How to Place a Process Serving Order for a Single Entity**.

Need it sooner than the times shown? Call us at (800) 675-5376.

Questions? We're here to help.

Call our Litigation Division Monday to Friday, 8:30 a.m. to 5:00 p.m. Pacific, or email info@directlegal.com. Ready to order? Log in to the portal.

(800) 675-5376