How to Place a Process Serving Order for a Single Entity

Send us documents to serve on one person or business. You tell us who to serve and where, add the case details and your documents, and choose how soon we should attempt service.

Start here

LOG IN TO THE PORTAL →

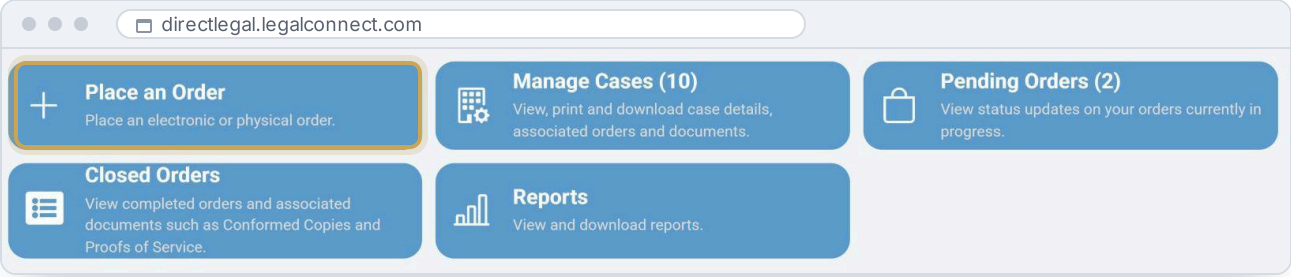
Or go to **directlegal.legalconnect.com** and log in with your email address and password. Use a current version of Chrome, Edge, Firefox or Safari. New to the portal? See our **Creating a New Account** guide.

What you will need

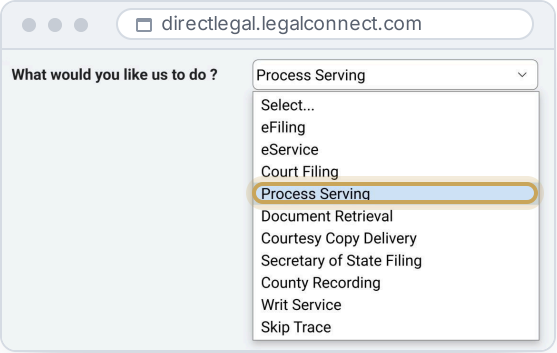
- The name of the person or business to be served
- The address where they should be served
- The case number and court, if you have them
- Your documents, as one file or one file per document
- Your billing code, if your firm uses one

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 party to be served

Leave **Select number of Party(s) to Serve** set to 1. Under **Party(s) To Serve**, type the name of the person or business to be served. Choose their **Capacity**, such as Individual or Corporation, and enter the **Registered Agent** if you know it. If you are serving a business or other entity, check **Is Entity?**

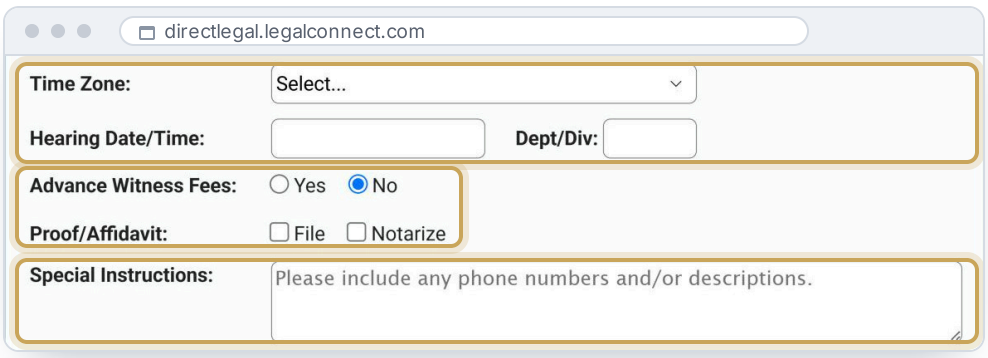
In **Enter Business Name or Address**, start typing the address where the documents should be served and choose it from the list. The address **Type**, such as Residential or Business, is filled in for you.



4 Add the hearing details and service options

If the documents have a hearing, enter the **Hearing Date/Time** and **Dept/Div**, and choose the **Time Zone**.

- 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.



Click **Next**.

5 Enter the case information

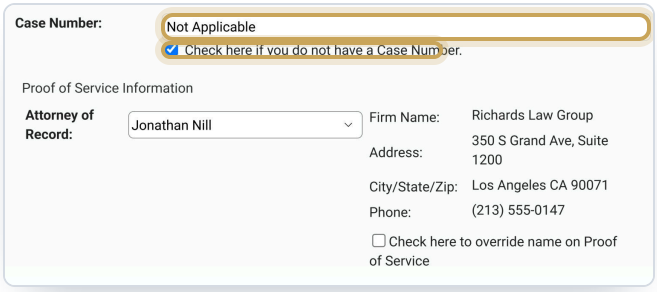
On the **Case Info** tab, type the **Case Number**. If the case is already in your account, choose it from the list and the court and case title fill in for you. For a case that is new to your account, press Enter. Then, in **Jurisdiction**, type the city where the court is located and choose the court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



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

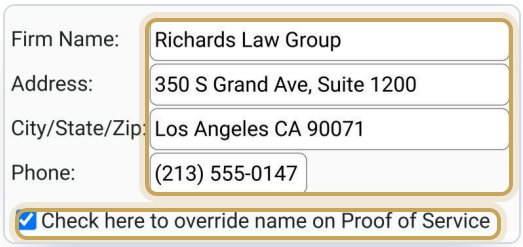


5A No case number yet?



Check **Check here if you do not have a Case Number**. The case number shows **Not Applicable**. Then choose the **Attorney of Record** and click **Next**.

5B Change the name on the proof of service



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.

6 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)** to add one.



In the **Add Party** box, choose **Organization** or **Person**, choose the **Role**, such as Plaintiff, and enter the name. Under **Is this your Lead Client?**, choose Yes for your client. Click **Save**.



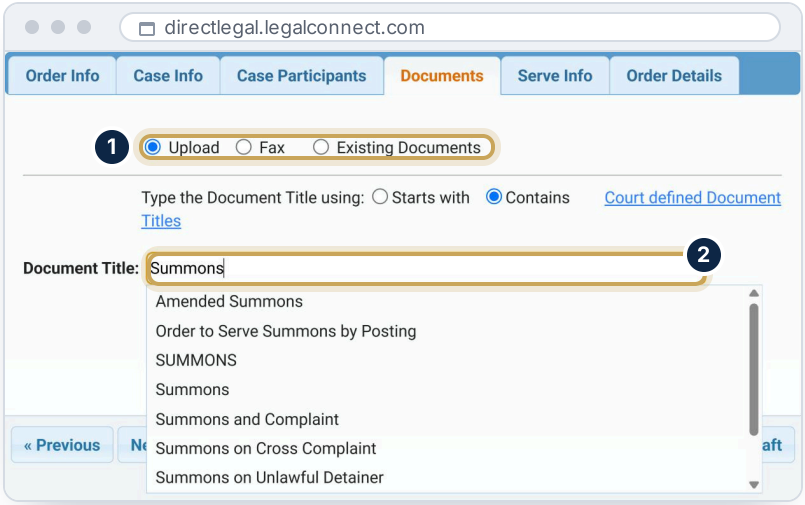
> **Billing code:** When you mark a party as your client, you may be asked for a **Billing Code**, depending on how your account is set up. This is your firm's internal billing or client matter number for the case.

Click **Next**.

7 Upload your documents

On the **Documents** tab, choose **Upload** to send files from your computer, **Fax** to fax them to us, or **Existing Documents** to use documents already uploaded on this case.

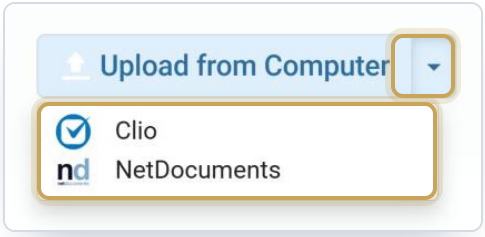
To upload, start typing the **Document Title** and choose it from the list, or type your own title. Choose **Starts with** or **Contains** to change how the list is searched.



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 this step until every document is attached.

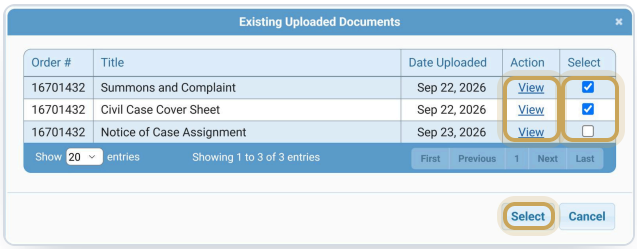
7A Or upload from Clio or NetDocuments



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.

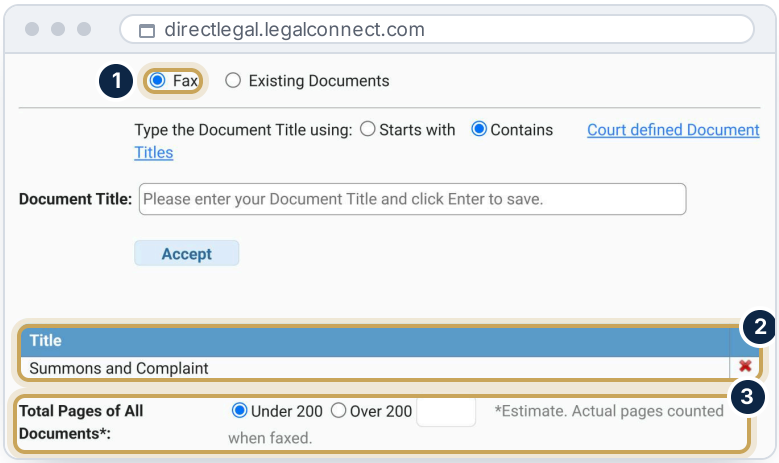
7B Use documents you already uploaded



Choose **Existing Documents** to see the documents already uploaded on this case. Click **View** to open one. Check the box under **Select** next to each document you want to use for this order, then click **Select**.

7C Fax your documents instead

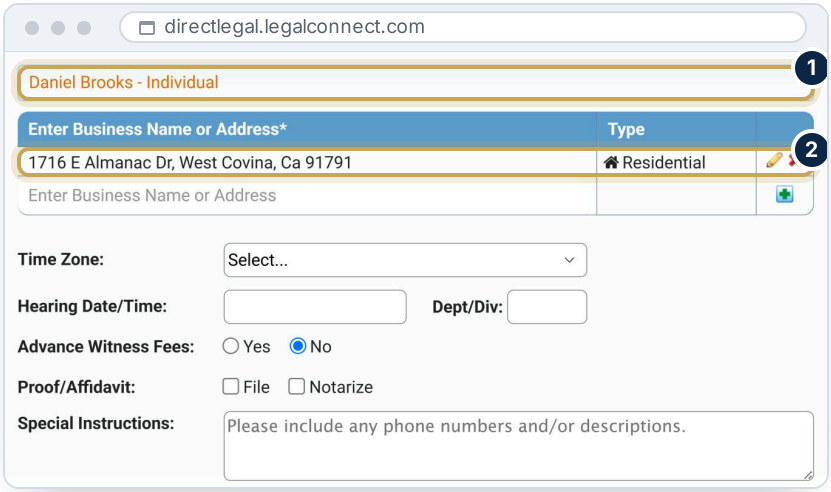
Choose **Fax**. Type the title of each document you will fax and choose it from the list, or type your own and click **Accept**. Each title is listed under **Title**. Then choose the total number of pages for all documents. This is an estimate. We count the pages when the fax arrives. Step 10 explains the fax cover page.



When all of your documents are listed, click **Next**.

8 Check the service address

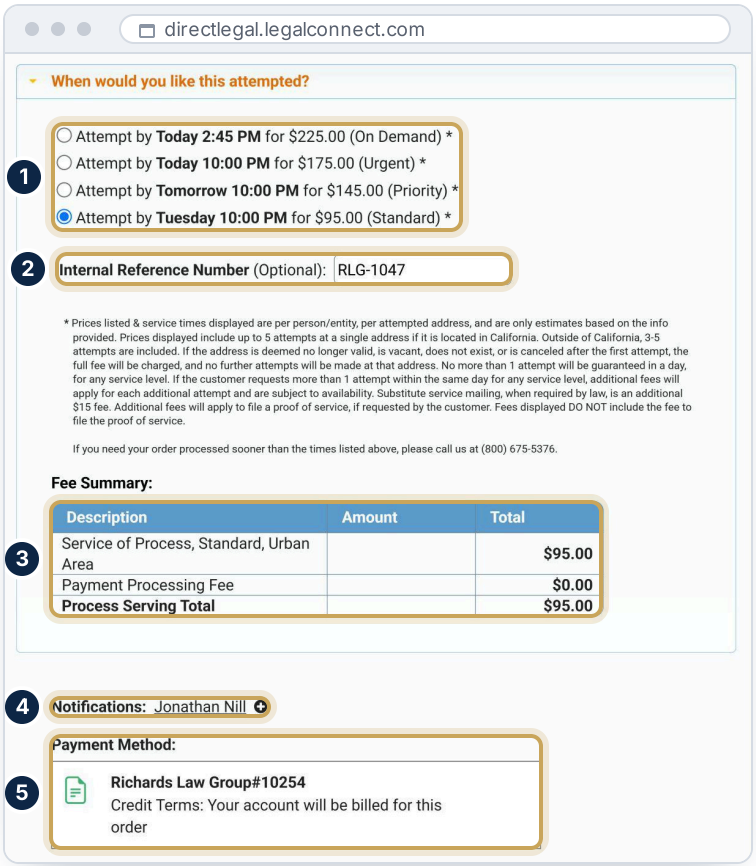
The **Serve Info** tab shows the party, the address you entered and your service options. Make sure the address where we will attempt service is correct, then click **Next**.



9 Choose when to attempt service

On the **Order Details** tab, choose a service level under **When would you like this attempted?** 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**. It is optional.

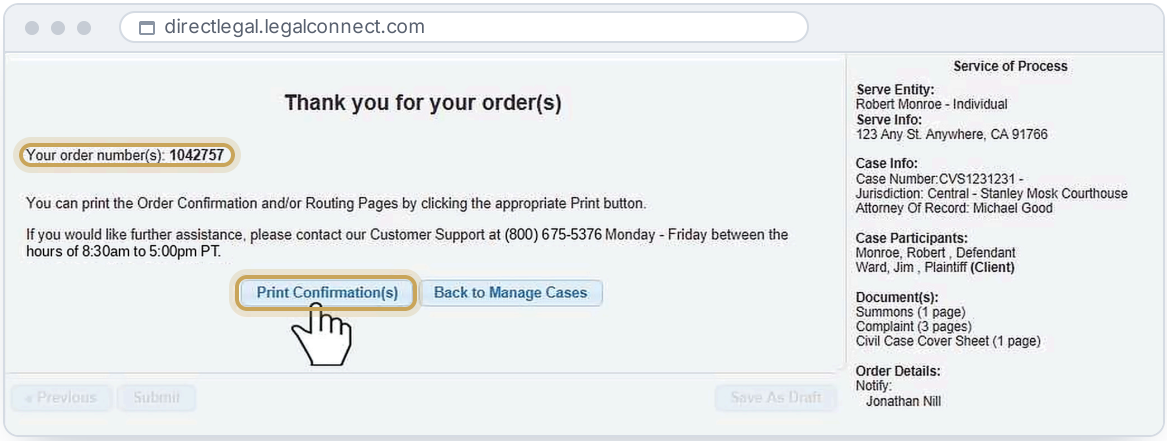
The **Fee Summary** shows the service fee, any **Payment Processing Fee** and the order total. Check **Notifications** for the people who will get status updates (click **+** to add someone) and the **Payment Method**. When you are ready, click **Submit**.



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

10 Get your confirmation

A confirmation appears with your order number. 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 order under **Pending Orders** on your dashboard
- Find the proof of service under **Closed Orders** once service is complete

Good to know

Serving more than one party? See our guide **How to Place a Process Serving Order for Multiple Entities**.

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