How to Place a Secretary of State Filing Order

Send us documents to file with the California Secretary of State in Sacramento, such as articles of incorporation or articles of organization.

Start here

LOG IN TO THE PORTAL →

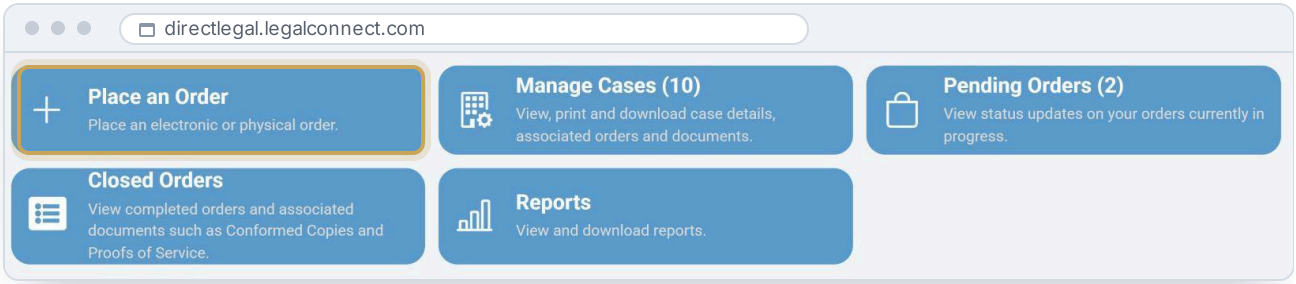
Or go to **directlegal.legalconnect.com** and log in with your email address and password. Use a current version of Chrome, Edge, Firefox or Safari. New to the portal? See our **Creating a New Account** guide.

What you will need

- Your documents, one file per document
- The name of the corporation or company
- Your billing code or client matter number, if your firm uses one

1 Click Place an Order

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



2 Choose Secretary of State Filing

In **What would you like us to do?**, select **Secretary of State Filing**.



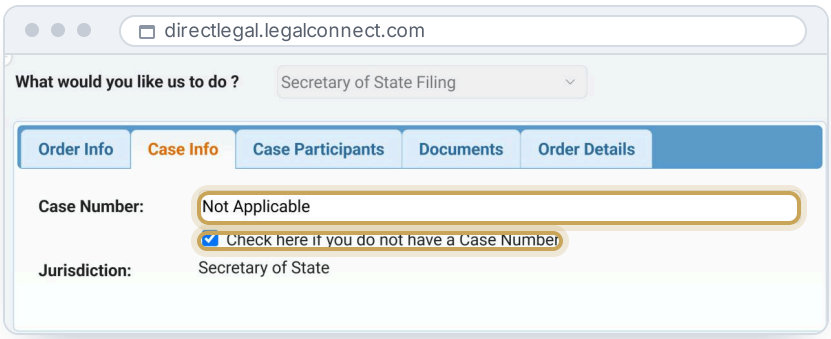
3 Check the jurisdiction

The **Jurisdiction** is filled in as **Secretary of State**. Click **Next**.



4 Mark that there is no case number

Below the **Case Number** box, check **Check here if you do not have a Case Number**. The Case Number changes to **Not Applicable** and the **Case Participants** tab opens.



> **Save As Draft:** To save your order as a draft at any point, click **Save As Draft**.

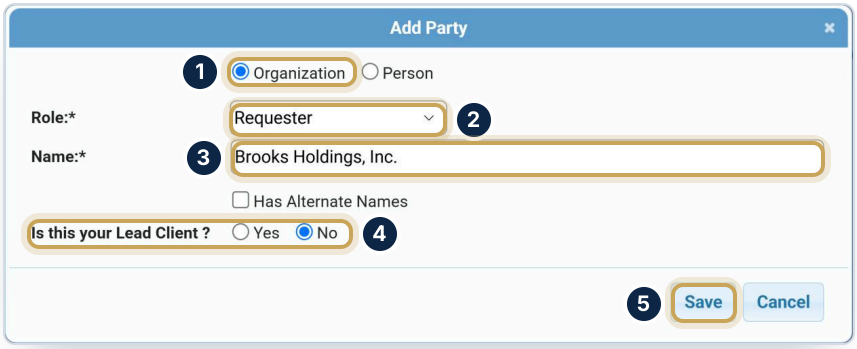
5 Add the requester

On the **Case Participants** tab, click **Add Party(s)**.



5A Enter the corporation

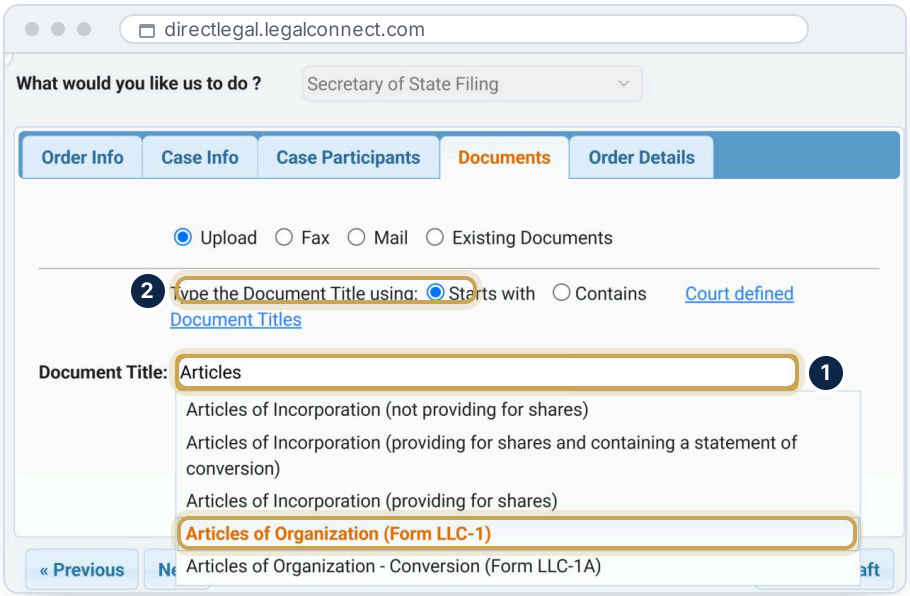
In the **Add Party** box, click **Organization** (1) and choose **Requester** as the **Role** (2). Type the name of the corporation (3). Under **Is this your Lead Client?**, choose **Yes** or **No** (4). Click **Save** (5), then click **Next**.



Billing code: When you click **Next**, you may be asked for a **Billing Code**, depending on how your account is set up. Choose the **Lead Client** and enter your firm's internal billing or client matter number.

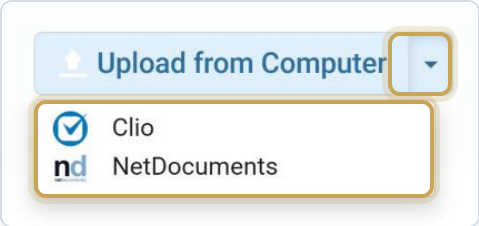
6 Upload your documents

On the **Documents** tab, start typing the **Document Title** and choose it from the list (1). Choose **Starts with** or **Contains** to change how the list is searched (2). If your title isn't listed, type your own. Then click **Upload from Computer** and choose the file.



One document per file: Upload each document separately. Repeat this step until every document is attached.

6A Or upload from Clio or NetDocuments

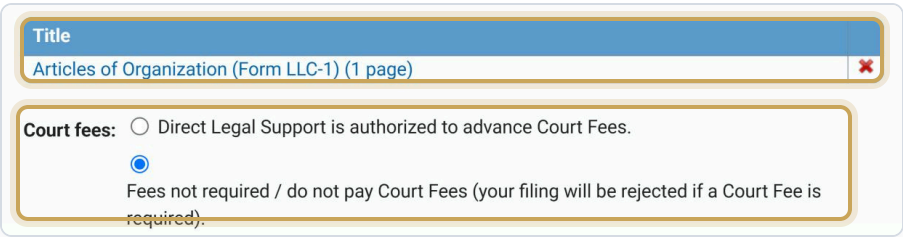


If your firm keeps its files in **Clio** or **NetDocuments**, you can attach the document from there instead of from your computer. Click the arrow next to **Upload from Computer** and choose **Clio** or **NetDocuments**. Sign in if asked, then pick the file.

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

7 Choose how fees are paid

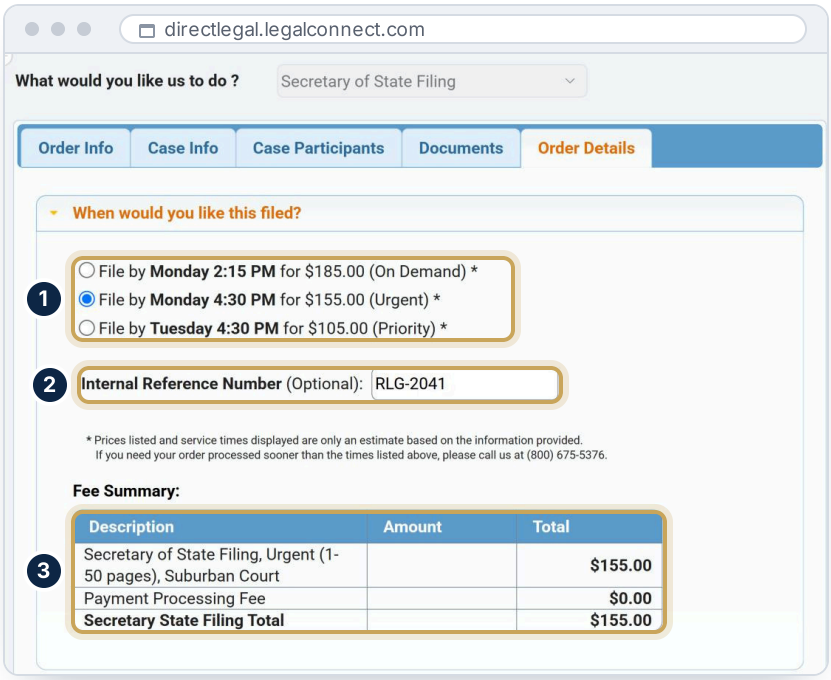
Each document you attach is listed under **Title**. Under **Court fees**, choose whether Direct Legal Support is authorized to advance the fees, or whether no fees are required. Click **Next**.



8 Choose when it is filed

On the **Order Details** tab, choose a service level under **When would you like this filed?** (1). For the fastest filing, choose **On Demand**. If your firm tracks orders with its own number, enter it in **Internal Reference Number** (2).

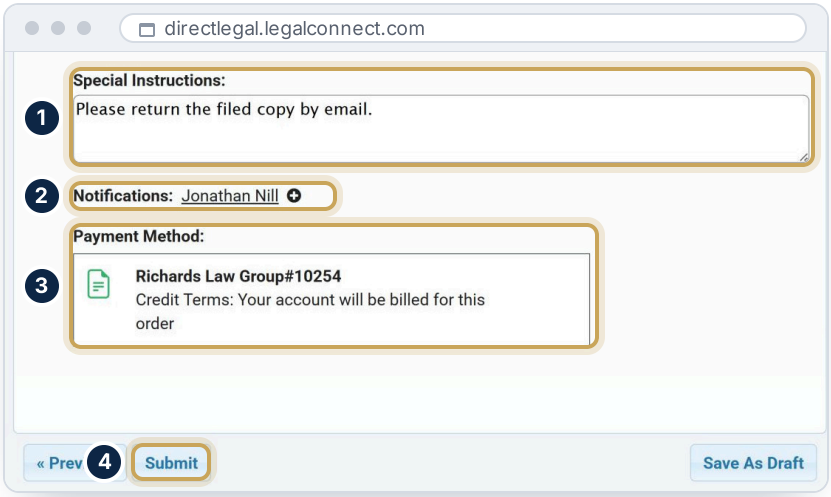
The **Fee Summary** shows our filing fee and your order total (3).



> **Times are estimates:** The filing times and prices shown are estimates based on the information you entered.

9 Add instructions and submit

Type any **Special Instructions** (1). **Notifications** shows who gets status updates on this order (2), and **Payment Method** shows how the order will be paid (3). When you are ready, click **Submit** (4). You will receive a confirmation email.



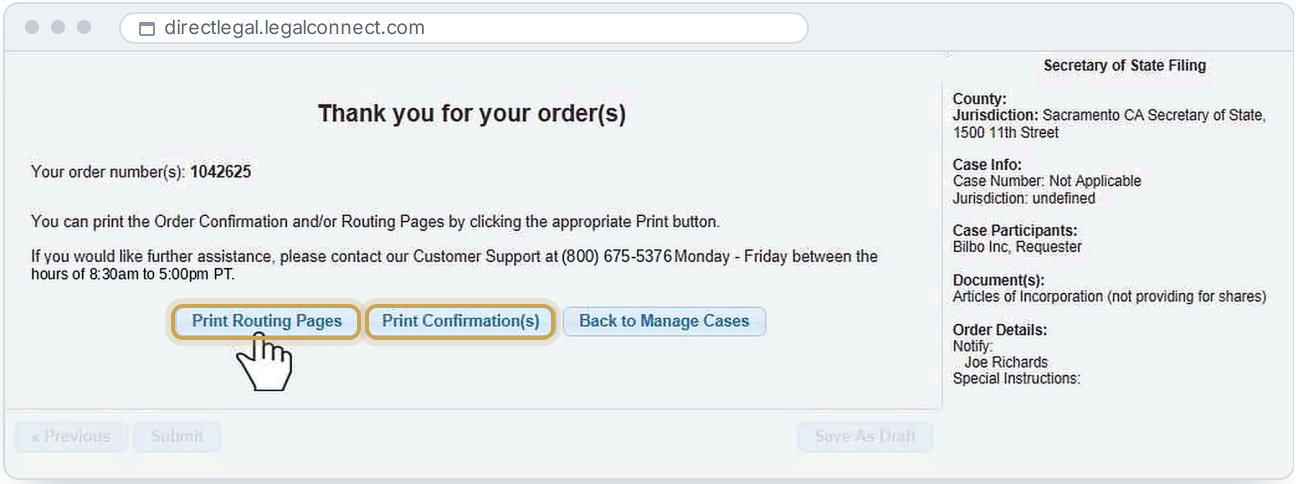


Notifications: You are listed by default. To add others, click the **+** icon next to the name, open the list and check each person who should get status updates.

10 Get your confirmation

A confirmation appears with your order number and a summary of the order. Click **Print Confirmation(s)** to print your order confirmation.

Sending the documents by fax or mail? Click **Print Routing Pages** and use the routing page as the cover page for your documents. The fax number is in the upper left corner of the routing page. If you are mailing them, call us at (800) 675-5376 for the mailing address.



After you order

- Follow your filing under **Pending Orders** on your dashboard
- Find completed orders and their documents under **Closed Orders**

Good to know

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

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