WNY Process Service, LLC

Client Portal Guide

Follow your jobs, download your papers and pay your invoices online

client.wnyprocesstools.com

Works on your phone, tablet or computer. Nothing to install.

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1. Getting started

Signing in

Go to **client.wnyprocesstools.com**. Tip: bookmark it, or use your phone browser's **Add to Home Screen** so it opens like an app.

- **Your username is your email address** — the one our "Your WNY Process Service Client Portal login" email was sent to.
- Already had a WNY client login before? That username and password still work too.

Setting your password the first time

1. Open our email "Your WNY Process Service Client Portal login" and tap **Set my password**.
2. Type a password of **at least 10 characters**, then type it again. Only you will know it — we never see it.
3. Tap **Save my password**, then **Go to sign in**, and sign in with your email address and your new password.

The link works once and for 7 days. If it has expired, use "Set or forgot my password" below.

Forgot your password?

1. On the sign-in page tap **Set or forgot my password**.
2. Type your email address and tap **Email me a link**.
3. Within 10 minutes you get an email "Set your WNY Client Portal password". Tap **Set my password** and pick a new one. That link works for 24 hours. Check your junk folder if it doesn't arrive.

Each person at your firm has their **own login** and sees all of your firm's jobs and invoices. Please don't share your password; if a coworker needs access, email **Service@wnyprocess.com** and we will set them up.

Passwords are case-sensitive. After 8 wrong tries the sign-in page locks for 15 minutes. For your security the portal signs you out by itself after 4 hours without use. Use **Sign out** when you finish on a shared computer.

If your firm works with us under more than one name or account, one login can show all of them together. Ask us to link them.

The menu

Menu item	What it is for
Overview	Your work with us at a glance: what needs you, hearings coming up, open jobs, recently completed jobs, and what you owe.
Jobs	Every job you have sent us, open and completed, with search, filters, a spreadsheet download and a printable list.
Activity	Everything that happened on your jobs, newest first.
Invoices	Your invoices, to download and to pay by card, and a statement of what is open.
Account	Your name, phone and password, and which emails you get from us.
Help	Quick answers on one page, a link to this guide, and our W-9 and certificates of insurance.

Sign out	Ends your session.

You only ever see your own jobs and invoices. Our phone number and email address are under the menu on every page.

2. Overview

This is the first page after you sign in. The first time, a **Welcome** box gives three quick tips; tap **Got it, hide this** and it stays hidden.

- **Find a job**: type a job number, case number, name, address or **your own file number** and tap **Search**. If you type an exact job number, the job opens straight away.
- **Open jobs**: how many jobs we are working on for you, and how many of them are on hold. Tap it to see the list.
- **Completed in the last 30 days**: tap it to see them.
- **Open invoices**: the total you owe, how many invoices, and how much is over 30 days old. Tap it, or **View and pay**, to go to your invoices.
- **Latest activity**: your most recently updated jobs. Tap a job number to open it, or **See all jobs**.

Needs your attention

Four boxes show what has changed **since your last visit** (the first time: the last 7 days). Each lists up to 5 names; tap a name to open that job, or tap **and N more** to see the whole list.

Box	What it shows
Affidavits ready	Jobs with a new affidavit or affirmation to download.
Served	People and businesses served.
Not served or on hold	Jobs on hold right now, and jobs finished without service. We may need something from you, such as a new address: call or email us with the job number.
Hearings coming up	How many of your jobs have a hearing **Today**, **Tomorrow** and in the **Next 5 days**, with the date, time and status of each. **Add all to my calendar** puts every hearing from today on into your calendar (see below).

Activity

Tap **Activity** in the menu to see everything that happened on your jobs, newest first: jobs received, attempts, served, not served, affidavits and documents, invoices and payments. It shows the last 14 days; change the **From** and **To** dates (up to a year) or untick what you don't need, then tap **Show**.

Hearing dates in your calendar

Tap **Add to my calendar** beside a hearing date on a job's page, or **Add all to my calendar** on the Overview. A small calendar file downloads; open it and Outlook, Google Calendar or your phone adds the hearing with the case number, court and a link back to the job. If we have no time for the hearing, it is added as an all-day event.

3. Jobs

Tap **Jobs** in the menu. Choose **Open**, **Completed** or **All** at the top. Search works on job number, case number, names, address and your file number. The newest jobs are first; use **Older** and **Newer** to move

through long lists.

The columns

Column	Meaning
Job	Our job number. Tap it to open the job.
Serve	The person or business to be served.
Case	The case or index number. Tap it to see everyone on that case together.
Your file #	Your own reference number for the job, if you gave us one.
Status	Where the job stands (see below).
Attempts	How many attempts our server has made (approved attempts only; see the job page below).
Received / Due / Completed	The dates we received it, it is due, and it was finished. Served jobs also show who **received** the papers (name and title).
Hearing	The hearing date and time, if there is one.

More filters and sorting

Tap **More filters and sorting** under the search box:

- **Show**: any result, or only Served, Not served or On hold.
- **Dates by** with **From** and **To**: jobs received, completed, due or with a hearing between two dates.
- **Sort by**: newest received, due date, hearing date, date completed or job number.
- **Only jobs sent by me**: just the jobs you sent us yourself (shown when we know which jobs are yours).

Tap **Apply**. Then **Download spreadsheet (CSV)** gives you that list for Excel, and **Print / save as PDF** gives a printable copy.

What the status means

Received	We have the job and are getting it ready to go out.
Assigned	A process server has the job.
In progress	At least one attempt has been made.
On hold	The job is paused. Email us with the job number if you have questions.
Served	Completed: the papers were served.
Not served	Completed without service (for example, after diligent attempts). The job page shows how it was closed.

4. A job's page

Tap a job number anywhere to open it. At the top are the job number, its status, who is being served, the case number and your file number.

- **Service**: who and where, when we received it, the due date (open jobs), the hearing date if there is one (with **Add to my calendar**), how many attempts and the last one, and once finished: the date completed, **how** it was served, who **received** the papers and at what time, a **map** of where our server's photo was taken, and whether the **affidavit** is **Returned** or still **Being finalized**.
- **Case**: case number, plaintiff, defendant, court, your file number, and the documents being served.

- **Documents**: tap **Download** to get any of these as a PDF, once they are on file:
  - affidavit or affirmation of service (or of non-service)
  - affidavit of mailing
  - your client-signed affidavit
  - skip trace, DMV and MVA reports
  - service documents, Department of State documents, witness fee
  - photo of the person served
  - record certification (CPLR 3122-a) for eviction notices
  - the invoice for the job
- **Photos**: field photos taken by our server. Tap one to see it full size.
- **Invoice**: the job's invoice with its balance or `Paid`, with **Download PDF** and, if anything is owed, **Pay now**.
- **Attempts**: every attempt with the date, time and the server's notes. Attempts show once our office has reviewed and approved them. We generally approve them during business hours, so an attempt made in the evening, on a weekend or on a holiday may not show until the following business day.
- **Everyone on this case**: opens the case's page (below).
- **Ask about this job**: type your question, check the email address we should answer, and tap **Send question**. It reaches our office with the job number and the person being served already attached, and we answer by email, usually the same business day.
- At the bottom: **Print this page**, and **Email us about this job**, which opens an email to us with the job number already in the subject.

A case's page

Tap a case number (on the Jobs list, or **Everyone on this case** on a job's page) to see everyone being served on that case together: each person's status, who received the papers, the date completed, the affidavit and a map link.

- **Download all affidavits** gives every affidavit on the case as one zip file.
- **Download all photos** does the same for the photos. Large cases can take a minute.

Record certification for eviction notices

For an eviction **notice** we served (not a petition), we can give you a **record certification** under CPLR 3122-a: a certification signed by our records custodian with the affidavit of service behind it. Once it is on file, it is under **Documents** on the job's page; tap **Download**.

If the job does not have one yet, the job's page shows **Need a record certification?** Tap **Request a record certification**. We make it and file it for you, usually within a few minutes: refresh the page and it is under Documents, and we email it to you too. If something holds it up (for example, the mailing is not on file yet), our office finishes it and lets you know.

If a job came to us through another company, that company is billed for it, so you may see the job but not its invoice. That is normal.

5. Invoices and paying

Tap **Invoices** in the menu. The box at the top shows your **open balance** and how many invoices are open. Choose **Open**, **Paid** or **All**, or search by invoice number, job number, **the person or business served**, address, case number or caption.

The **For** column shows who was served on each invoice, their address and the case. If an invoice covers several jobs it says **+ N more**; tap it to see every job on that invoice.

- **PDF** downloads the invoice.
- **Pay** opens our secure card payment page for that invoice in a new tab.
- **Statement of what is open** shows every open invoice on one page with how many days old it is and totals for 0–30, 31–60, 61–90 and over 90 days. Tap **Print or save as PDF** to keep a copy.

Need our **W-9** or a **certificate of insurance** (general liability or professional liability) for your records? Download them from the **Help** page, under Paying.

Paying one invoice

1. Tap **Pay** (on the Invoices page, or **Pay now** on a job's page).
2. Our card payment page opens with the invoice and amount filled in.
3. Enter your card details and confirm. Card payments are processed securely; we never see or keep your card number.

Paying several invoices

1. On the **Open** tab, tick the box beside each invoice (or the top box for all of them).
2. Tap **Pay selected**. A checkout list shows the invoices and the total.
3. Tap **Pay** on each one in turn. Each opens its own payment in a new tab, because our payment page takes one invoice per payment. The list ticks each one off as you go.

A payment shows on your Invoices page once it has been processed. If you just paid, tap **Refresh invoices** or come back a little later.

6. Your account

Tap **Account** in the menu.

- **Your details**: change your name and phone number and tap **Save details**. We are told so our records match. To change the email address you sign in with, email us.
- **Password**: type your current password, then the new one twice (at least 10 characters), and tap **Change password**.
- **Emails you get from us**: for each email (we received your job, each attempt, served or not served, affidavit ready, new invoice, statements) choose **Yes, send it** or **No, stop it**, add another address or a note if you like, and tap **Send to the office**. We set it up for you and let you know.

Signed in with your older WNY client login? Your details show there, but to change that password or your details, call or email us.

7. Getting help

Tap **Help** in the menu for quick answers on one page.

To	Do this
Ask about a job	Use Ask about this job on the job's page, or email Service@wnyprocess.com with the job number in the subject.
Get our W-9 or certificate of insurance	Tap Help in the menu; they are under Paying.

Something urgent	Call 716-481-9620.
A question about an invoice	Email Service@wnyprocess.com with the invoice number.
A forgotten password	Tap Set or forgot my password on the sign-in page.
Change your password or which emails you get	Tap Account in the menu.
A login for a coworker	Email Service@wnyprocess.com with their name and email address.

8. If something isn't right

What you see	Why, and what to do
I can't find a job	Choose All on the Jobs page and search again; try the case number or your file number. Cancelled jobs are not shown. Email us if it is still missing.
"Job not found"	That job is not on your account.
The affidavit isn't there yet	The job page says Being finalized until the signed affidavit is back. It appears under Documents as soon as it is filed.
I asked for a record certification but it isn't there	Refresh the job's page after a few minutes. If something held it up, our office is finishing it and will email it to you.
The calendar file doesn't open	Open the downloaded file from your Downloads folder, or in Outlook use File, Open, Import. Google Calendar: Settings, Import.
A zip says some files are missing	Open the READ ME file inside the zip; email us the job numbers it lists and we will send them.
A document won't download	Try again in a minute. If it still fails, email us and we will send it.
I paid but the invoice still shows open	It shows as paid once processed. Check again a little later, and email us if it hasn't changed by the next business day.
I can see a job but not its invoice	The job was billed to the company that sent it to us.
I was signed out	This happens after 4 hours without use. Sign in again.
The sign-in page is locked	Too many wrong passwords. Wait 15 minutes, then sign in again or tap Set or forgot my password.
"This link has expired or was already used"	Each set-password link works once. Tap Set or forgot my password on the sign-in page for a new one.
"Your current password is not right"	Type the password you sign in with now. Forgot it? Sign out and tap Set or forgot my password.
I can't change my password on the Account page	You signed in with your older WNY client login. Call or email us to change it.
No set-password email	Check your junk or spam folder. Still nothing? Email us. Our emails come from Service@wnyprocess.com

Thank you for choosing WNY Process Service.

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