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TXDocs Phone App

Here at TXDocs we are excited about the release of our phone app. This app will allow you to view appointments, client information and tasks that were created in TXDocsPlus. You will also be able to create appointments, tasks, expense slips and time slips in the phone app.

All of this information will automatically sync between TXDocsPlus and the phone app. Any changes that you make in the phone app while offline will sync to your TXdocs account as soon as your device reconnects to the internet.

Setup: Enable phone app in TXDocsPlus

**This sections is going to cover how to enable the phone app in your TXDocs account.**

Part 1:

To begin enabling the phone app in TXDocs you need to log in to TXDocs and follow these instructions.
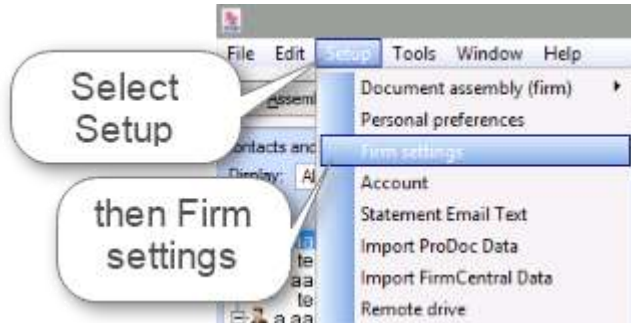

Part 2:

Next follow the instructions in the image below. This is where you will enable the phone app for your TXDocs account. You can also view the staff members authorized to use the phone app. Once enabled, the phone app will not be disabled until you do so manually.
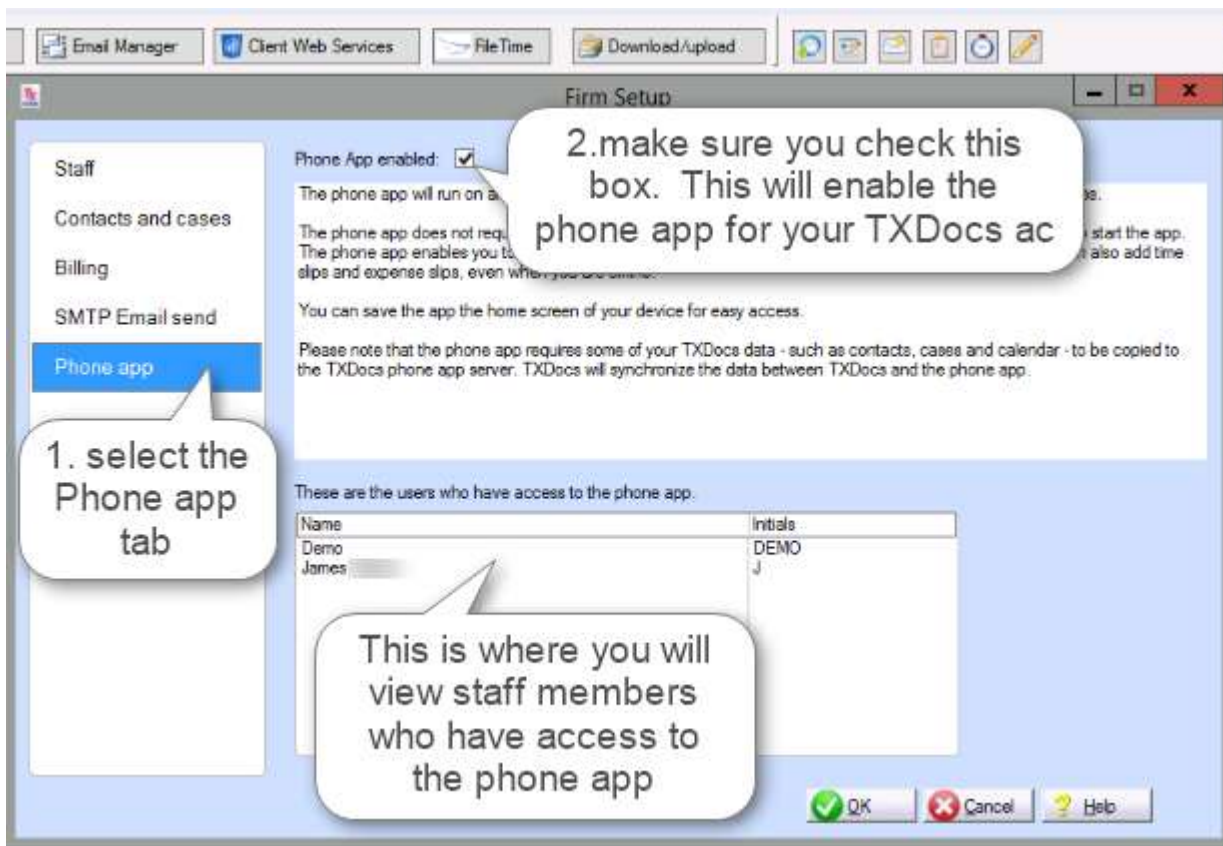
Part 3:

This is where you will select the Staff who will have access to the phone app. Follow the instructions in the image below.
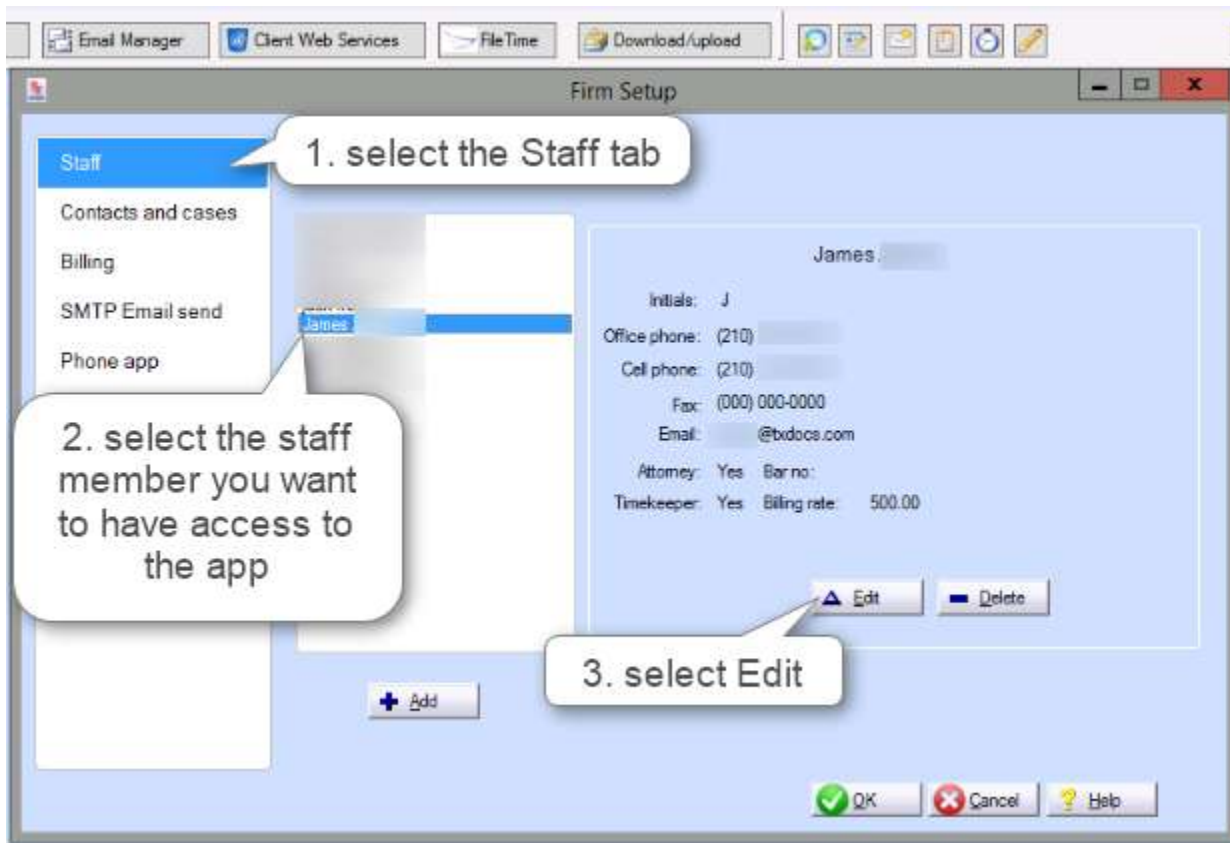
Part 4:

Here you will setup the staff member to have access to the phone app and setup all the necessary options for their account.

TXDocs login

On your phone, open the internet browser and navigate to our phone app.

https://app.txdocs.com

NOTE – The last sections of this manual tell you how to add a TXDocs phone app icon to the home screen of your phone so that you do not have to navigate in your browser.

TXDocs Login page

-When entering your Firm ID, do not follow with _1.

-The initials used to access the phone app are the initials you have set up in your staff profile, this is also where you can set and change your password for the app.

TXDocs Home

TXDocs Home page

Search for Clients or All Contacts

Search 🔍

◉ All ○ Clients

View and Add Contacts or Clients

Contacts

View and Create appointments

11

Calendar

Create and View tasks

Tasks

Change personal settings

Setup

Tap on phone number to call support

🌐 txdocs.com

(210) 253-9506

TXDocs Training

-This Home screen is where this 🏠 button will take you.

Contents Home

Select to go to Home screen

Contacts

Select to add a new Client or Contact

◉ All ○ Clients

, Robert

Select a client to view their profile

, Ashley

, Sunny

, Trent

, Jarred

, Melissa Lynn

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
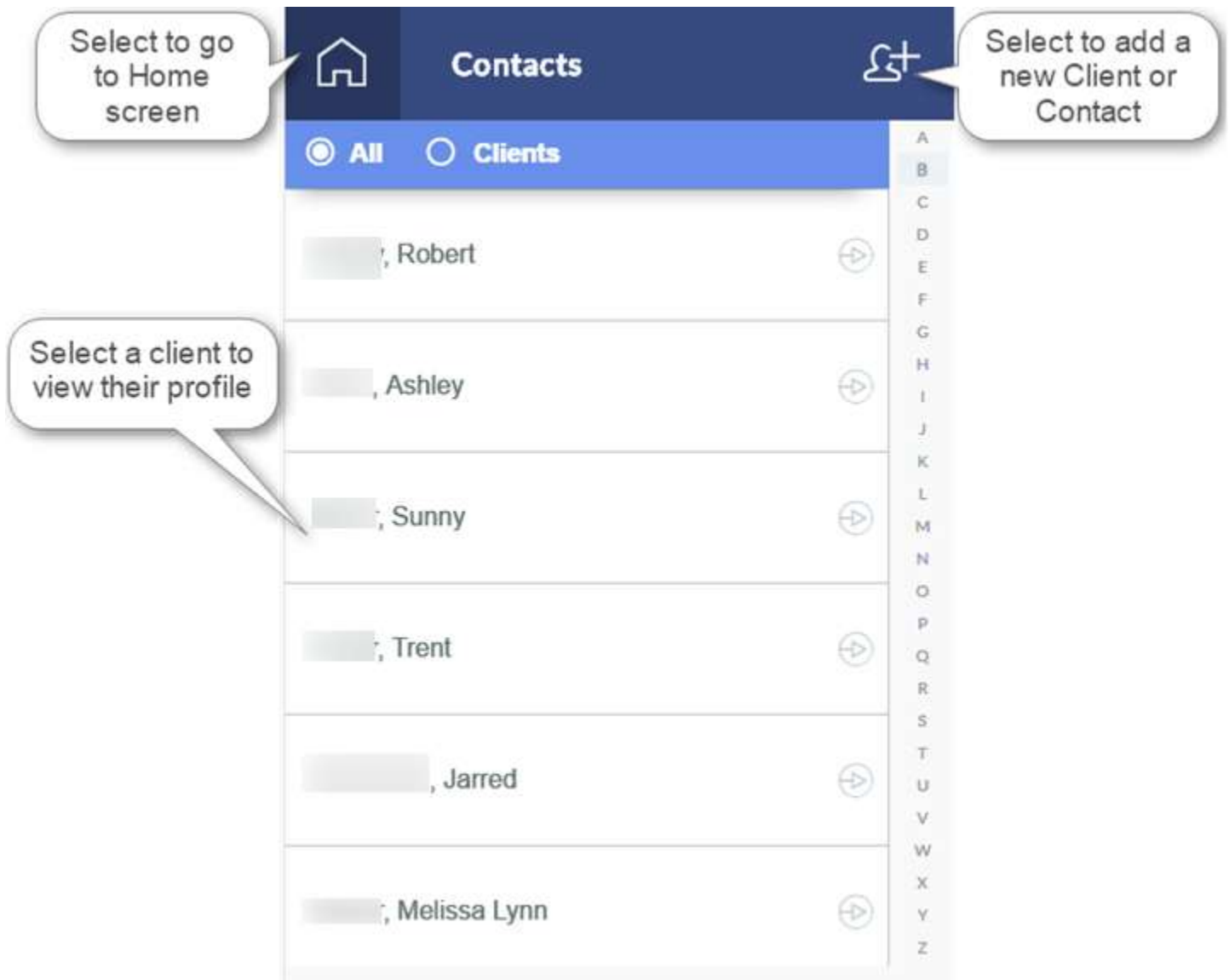
- You can tap on a letter in the column on the right side of the screen to jump to clients or contacts whose last name begins with the corresponding letter.

View Contact

-Time slips and Expense slips can only be created with the phone app, they can only be viewed through your TXDocs Anywhere account.

Edit Contact

Edit Contact

Business

☑ Client

Lastname

First name

Addresses

 | Click to add 2nd address

Phone numbers

(000) 435 8249

Email addresses

✕ Cancel | 💾 Save

After editing is complete, select Save. There is also a save icon in the upper right corner of every screen where you edit information.

Create Time slip/ Expense slip

Home page

Choose time or expense slip

Choose the date for the slip

Save

Previous page

Remove client from slip

Select the clients case

Time slip   Expense slip

Date

09/07/2016   [11]

Client: , Caleb
Select case:

divorce

Description

Extra details about the time spent.

Select an option that suits your case

Select the rate you want to charge for this case

Cancel the slip

Select the amount of time spent if applicable

Save slip

O Hourly

Fixed rate

Pro bono

00

hours

15

minutes

Rate

500.00

Total

$ 125.00

X   Cancel   Save

-Time slips and Expense slips can only be created with the phone app, they can only be viewed through your TXDocs Anywhere account.

Calendar Home

-**You can Swipe left or right to view previous or future dates on this page.**

Add appointments

Add Appointment

Home page

Save Appointment

Previous page

Date & Time

Select either of these to change the starte and end time of an apptointment

Starts   09/02/2016 | 4 : 00 PM

Ends   09/02/2016 | 5 : 00 PM

Description

Appt description must be entered to allow saving of the appt.

Appointment Description

Search client:

Optional: assign appt. to a client

Search term

Reminder
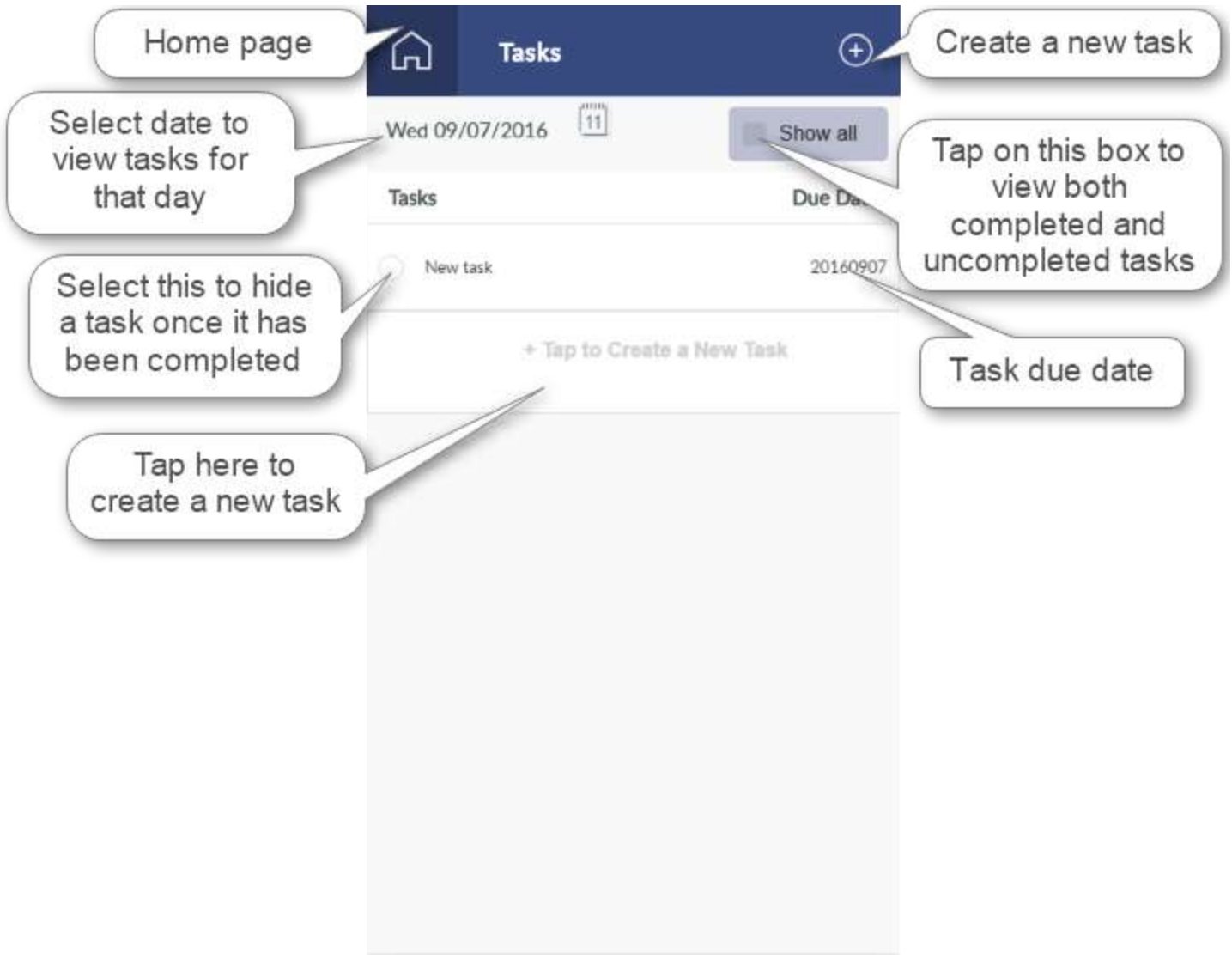
set a reminder for an appt. via Text or Email. You can customize the time beforehand at which you are reminded.

Text ∨   15   Minutes ∨ ✕

+ Add a Reminder

You can choose up to two reminders, one of each if you desire

Optional Note

Cancel Appointment

Save Appointment

Cancel   Save

Tasks Home

Home page

Create a new task

Select date to view tasks for that day

Tap on this box to view both completed and uncompleted tasks

Select this to hide a task once it has been completed

Task due date

Tap here to create a new task

Tasks

Wed 09/07/2016   Show all

Tasks   Due Da.

New task   20160907

+ Tap to Create a New Task

Add tasks

Home page

Save task

Add task

Select the date for the task

Previous page

Due Date

09/02/2016

Subject

Enter a subject for the task (Must be done)

Search client:

Search term

Link a client to the task. (Optional)

Description

This is a task that needs to be done

Cancel task

Save task

X Cancel

Save

Setup

Home page — (home icon) **Setup** (back arrow) (save icon) **Save preferences**

Previous page

(gear icon) **Preferences**

You can choose your default appt. duration

Appointment Default Duration

60 minutes

Default reminder Method

Text

You can choose either Text or Email as your default reminder

This time will be the time where your calendar starts each day

Workday starts at

7 : 00 AM

Workday ends at

5 : 00 PM

This will be the time that your calendar ends each day

(envelope icon) Email

support@txdocs.com

Your Email you want reminders sent to

(phone icon) Mobile Phone

210-253-9506

Your phone number where you want Text reminders sent

Select to call TXDocs Support

TXDocs Support

Select to start Email to TXDocs Support

Call Support   Email Support

-View the next page for the rest of the setup menu.

Workday starts at

7 : 00 AM

Workday ends at

5 : 00 PM

✉ Email

support@txdocs.com

📞 Mobile Phone

210-253-9506

TXDocs Support

| 📞 Call Support | ✉ Email Support |

Cancel changes

✕ Cancel

Save changes

💾 Save

If changes made in TXDocsPlus have not synced to the phone app, tap on this button to Force a data refresh

Logout

Refresh data

Clear local cache

Send debug log

If you are experiencing errors or issues tap on this to send a log to support so we can fix the issue.

- Sending the Debug log in the event of an error or unwanted operation is beneficial in helping us what caused the problem so that we can fix it and prevent it from happening again.

iPhone-Adding TXDocs app to home screen

Adding the TXDocs app to your home screen will save you time make it easier for you to access the app and will save you time. You will also stay logged into the app until you manually log out.

-Begin by opening Safari and enter this web address; app.txdocs.com
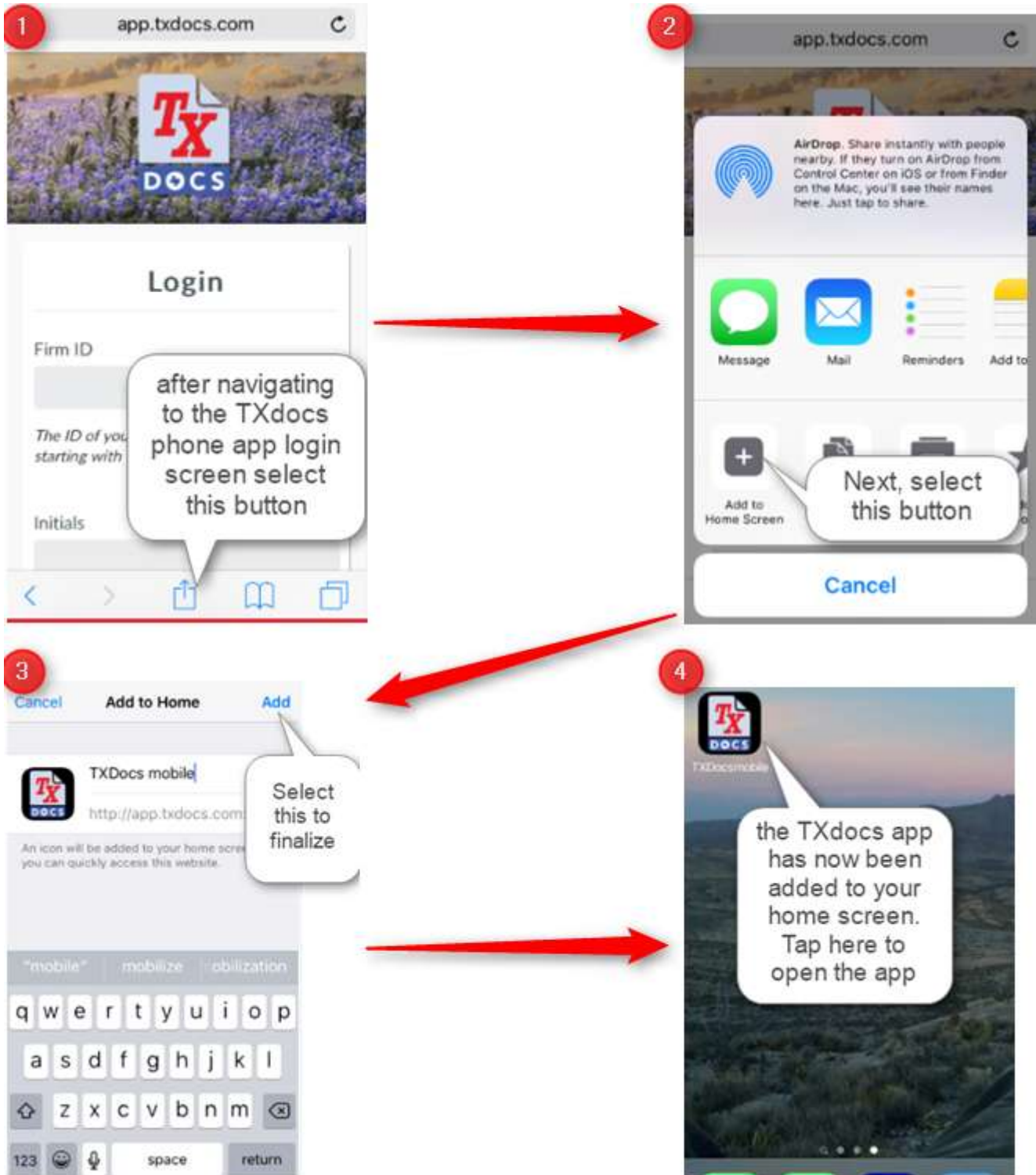
Turn off Private browsing in Safari

Start by opening Safari and then follow the instructions in the images below to turn off 'Private' browsing.

-Private browsing only needs to be turned off temporarily and can be turned back on after the TXDocs phone app has be saved to your Home screen.   Private browsing does not allow safari to access your local storage which is necessary for the phone app. Once the TXDocs phone app is saved to your Home screen private browsing will no longer prevent the access to local storage.

iPhone- Add to Home Screen option

Follow the instructions in the images below to find the option for adding the TXDocs app to your home screen.
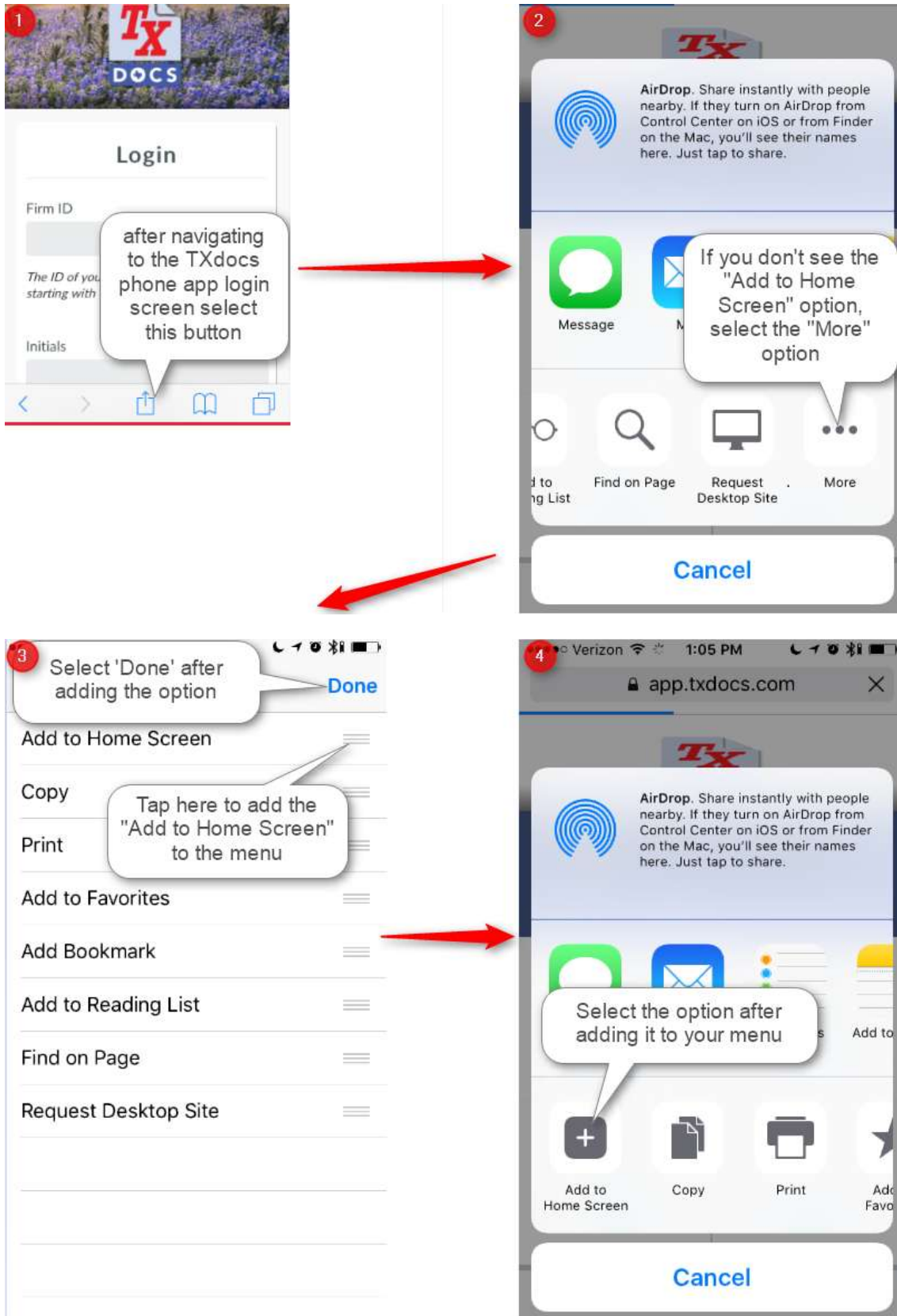
Android- Adding TXDocs app to home screen

Adding the TXDocs app to your home screen will save you time make it easier for you to access the app and will save you time. You will also stay logged into the app until you manually log out.

-Begin by opening a browser (Ex. Chrome) on your phone and enter this web address; app.txdocs.com

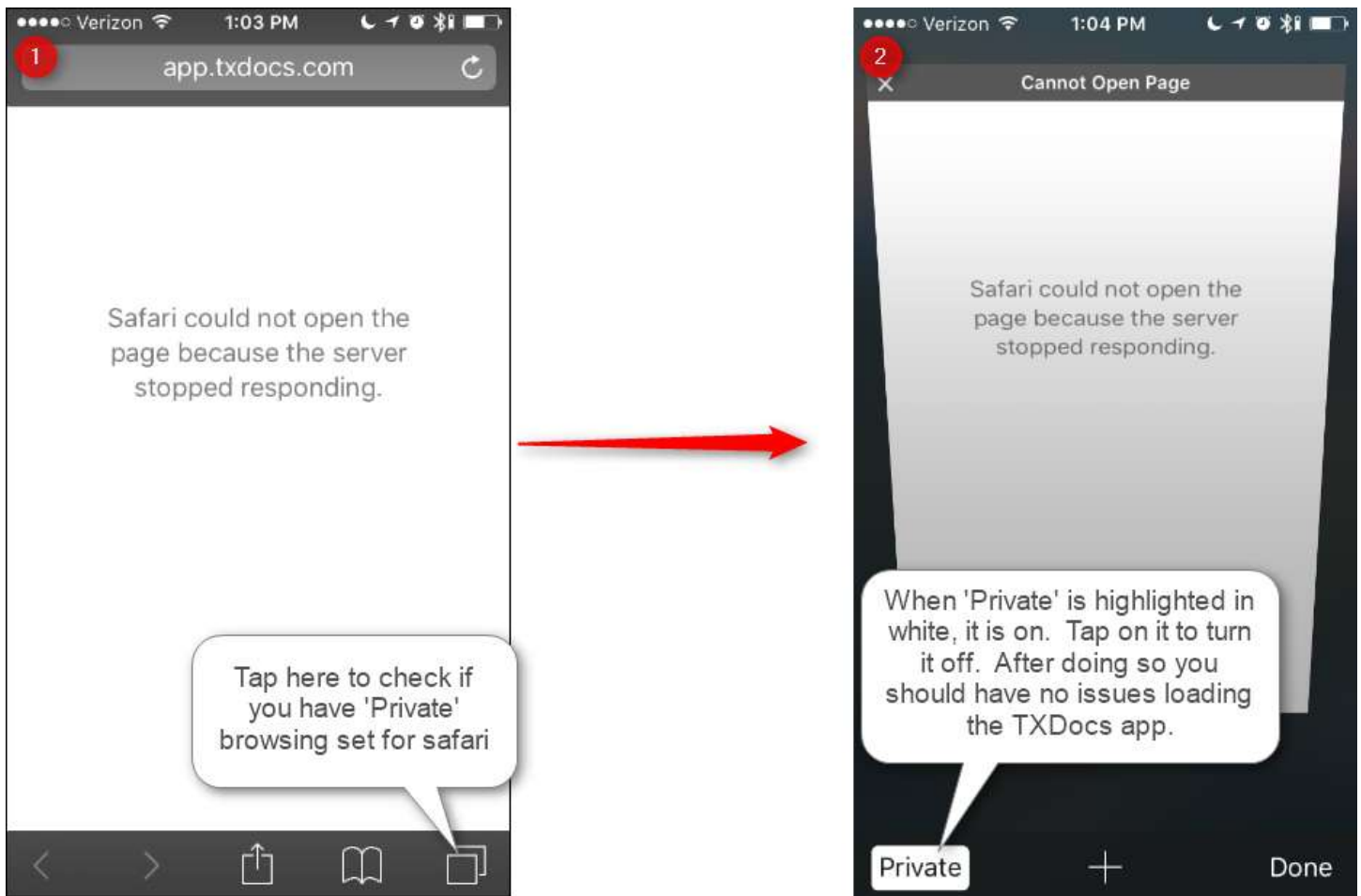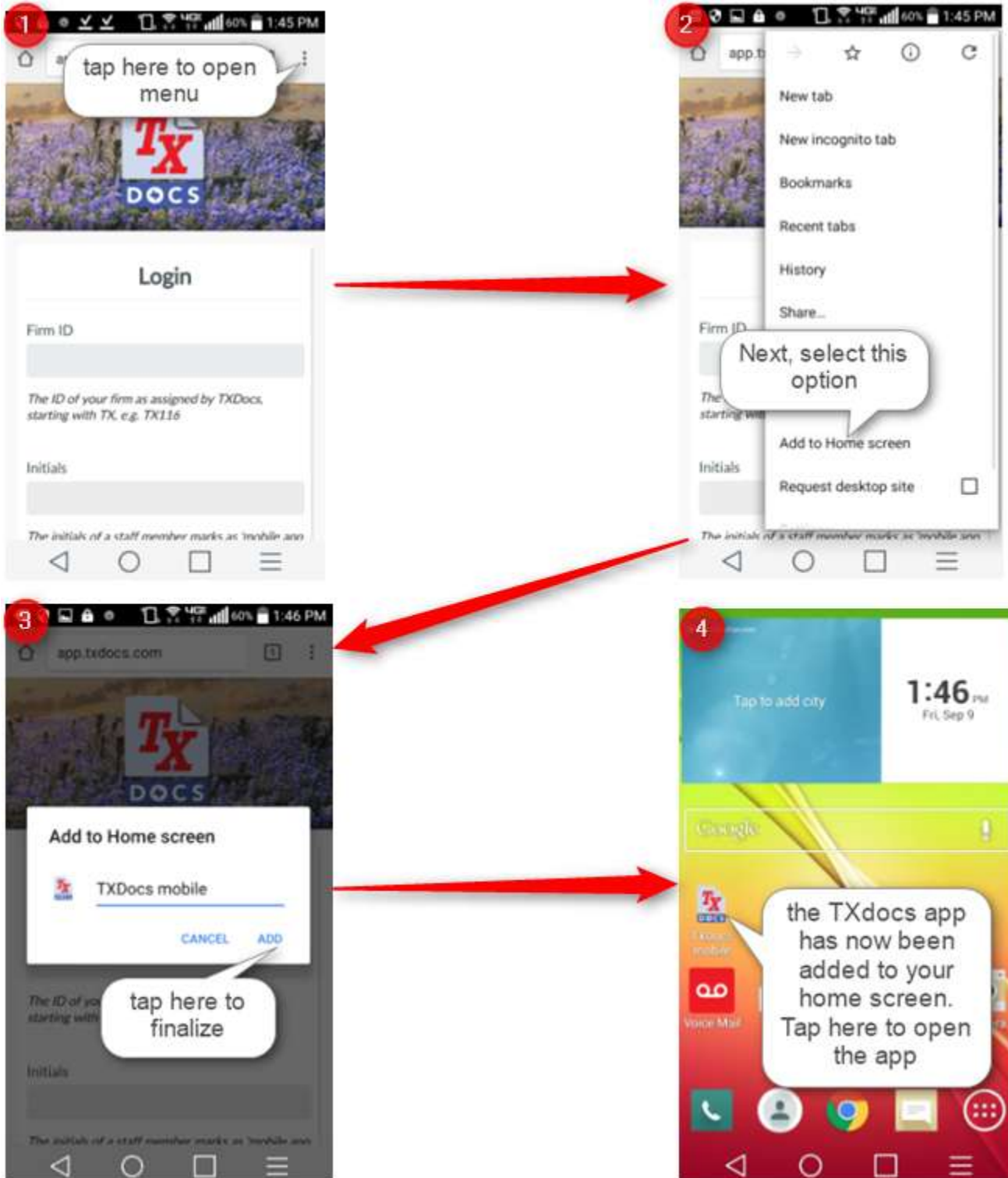# Windows- Adding TXDocs app to home screen

Adding the TXDocs app to your home screen will save you time make it easier for you to access the app and will save you time. You will also stay logged into the app until you manually log out.

FAQ's

Q- I have enabled the phone app in TXDocs but I am still unable to login, what else do I need to do.

A- After you enable the phone app you need to go to the **Staff** tab in **Firm Settings** and select the staff member you want to allow access to the phone app and then select **Edit.** Select the box **Mobile app login allowed**, then enter in the **App Password** for that individual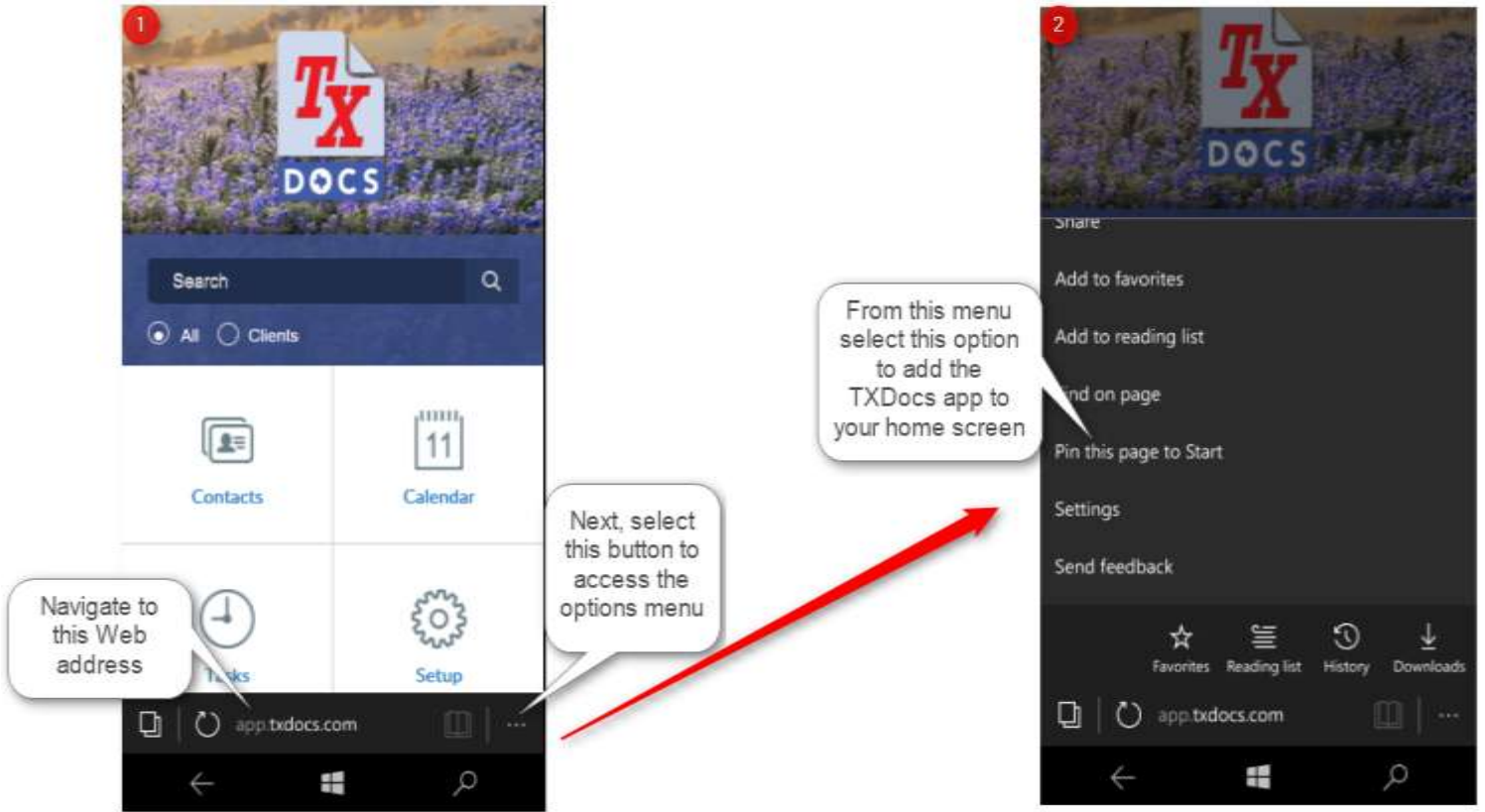. The **Use alternative email or phone for reminders** options are only applicable if you do not want reminders sent to the **Cell phone** and **Email** for that staff member that have already been entered.

Q- Someone other than the attorney set up an appointment using the phone app. Where are the reminders sent?

A- The reminders are sent to the phone or email of the individuals account that created the appointment. If someone other than the attorney creates an appointment, but the attorney is the person who needs to receive the reminders then you would need to create the appointment in TXDocsPlus and select the Attorneys name from the dropdown menu. Any appointments created in the app will be linked to the user that created them.

Q- I have an iPhone and when I try and navigate to the TXDocs app in safari I get a message "Safari could not open the page because the server stopped responding". What did I do wrong?

A- You may have 'Private' browsing on, in which case this may be causing your issue. See the section; Turn off Private browsing in Safari.

Q- I have an iPhone and I'm trying to add the TXDocs app to my home screen, but I don't see the option. Where do I find it?

A- For instructions on where to find the option to add a website to your home screen using safari please see the section; iPhone- Add to Home Screen option.

Q- I am trying to log in to the phone app but I get a "Sign in request failed" error message.

A-Make sure that the Firm ID consists of 'TXxxxx' (leave off the _1 if you are an anywhere user) . If you are unsure of your firm ID (aka; account number) then feel free to contact us. Also make sure that you are entering the correct Initials and that the password you are using is the one you set up for the phone app specifically.

Q- I entered a password in my staff profile for the phone app and when I went back to view it the password field was full. I did not create a password that long.

A- The password you originally entered is still the active password, what you are seeing is meant to mask the true length of your password.