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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.

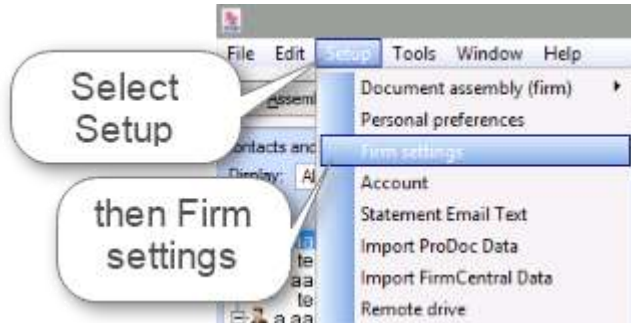
All of this information will automatically sync between TXDocsPlus and the phone app. Any changes that you make in the phone app while offline will sync to your TXdocs account as soon as your device reconnects to the internet.

Setup: Enable phone app in TXDocsPlus

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

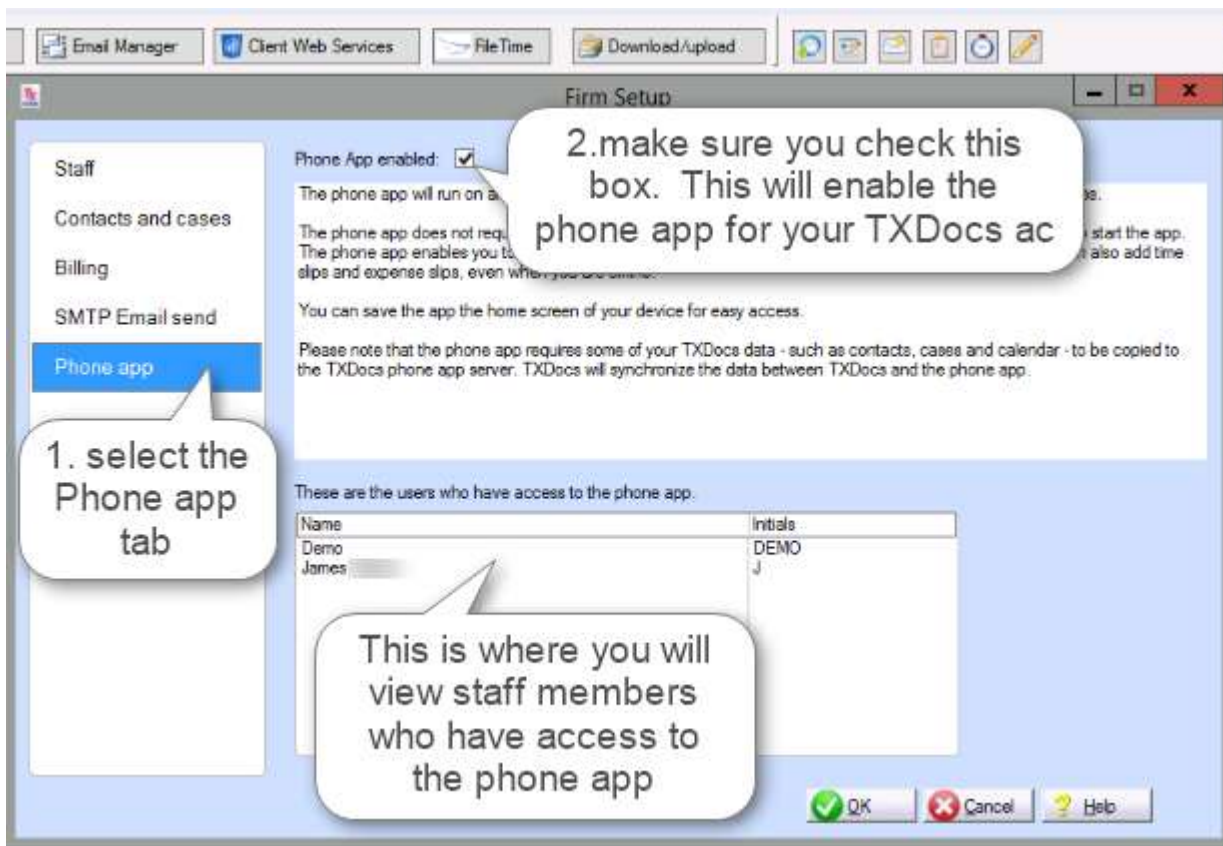
Part 1:

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



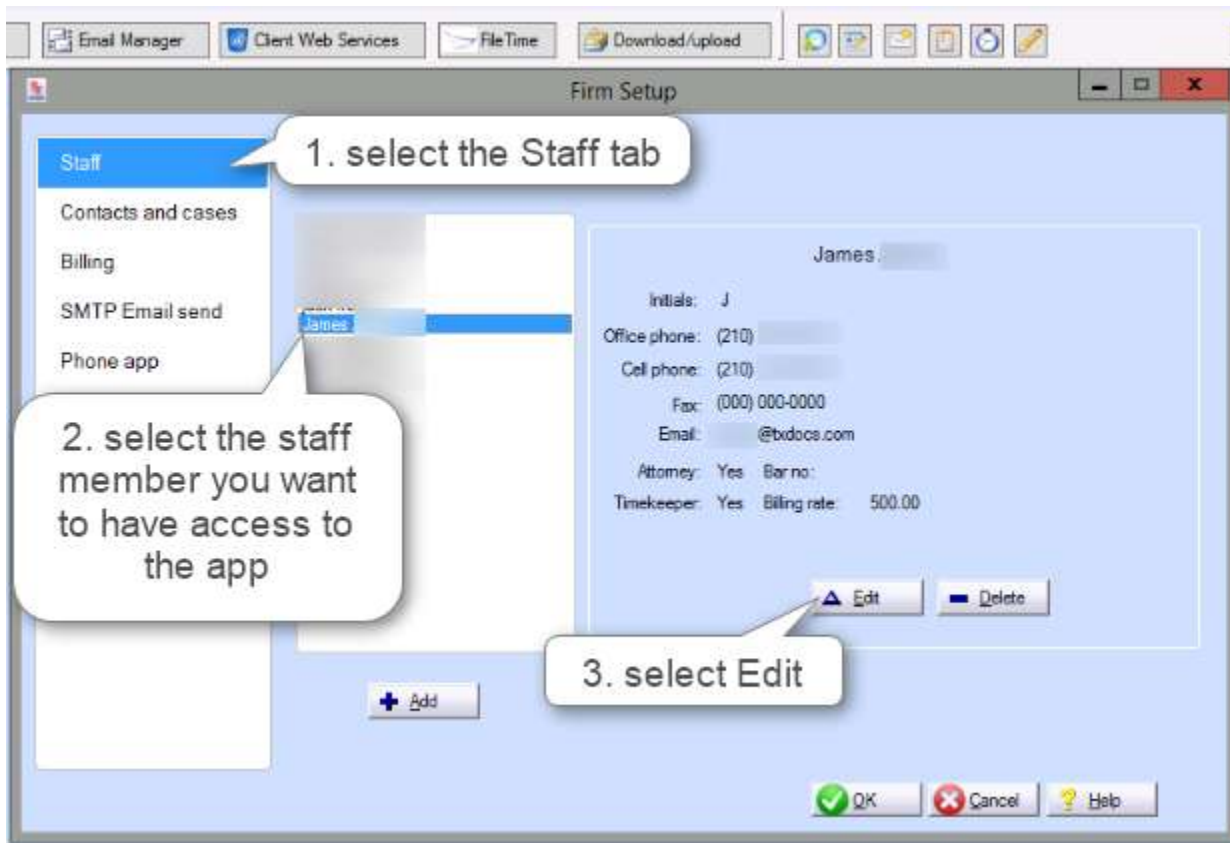
Part 2:

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.

Firm Setup

Staff Information

Name: James Initials: J (to sign on)

Office phone: (000) 000-0000 Cell phone: (000) 000-0000 Fax: (000)-000-0000

Email: support@bxdocs.com

Attorney Bar No: _____

Timekeeper - calendar & billing Hourly billing rate: 500.00

Mobile app login allowed App Password: ●●●●●●●●●●●●●●●●●●●●

Use alternative email for reminders _____

Use alternative phone for reminders _____

Signature block for letters: ie. Sincerely, _____

Your Name _____

Signature block for pleadings: _____

OK Cancel Help

The initials here will be used to log into the app for this staff member

1. Select this box to allow access to the app for the staff member selected

These alternative options are only necessary if you do not want reminders sent to the Cell phone and Email for this staff member that are listed above in the Cell phone and Email fields. They can be edited any time.

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

Login

Firm ID

The ID of your firm as assigned by TXDocs, starting with TX, e.g. TX116

Initials

The initials of a staff member marks as 'mobile app enabled' in TXDocsPlus. You can manage the Staff using the Setup menu, Firm settings.

TXDocs Login continued

Login

Firm ID

The ID of your firm as assigned by TXDocs, starting with TX, e.g. TX116

Initials

The initials of a staff member marked as 'mobile app enabled' in TXDocsPlus. You can manage the Staff using the Setup menu, Firm settings.

Password

Please enter the staff member password, not the firm password.

TXDocs Support

[Call Support](#) [Email Support](#)

Sign In

Enter your TXDocs firm ID here

Enter your TXdocs login initials here

Enter the password that was set up under 'App password' for the person that is logging in. (Not the same password used to log into TXDocs Anywhere)

If you experience issues logging in, you can call or email TXDocs support by selecting the appropriate link

-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

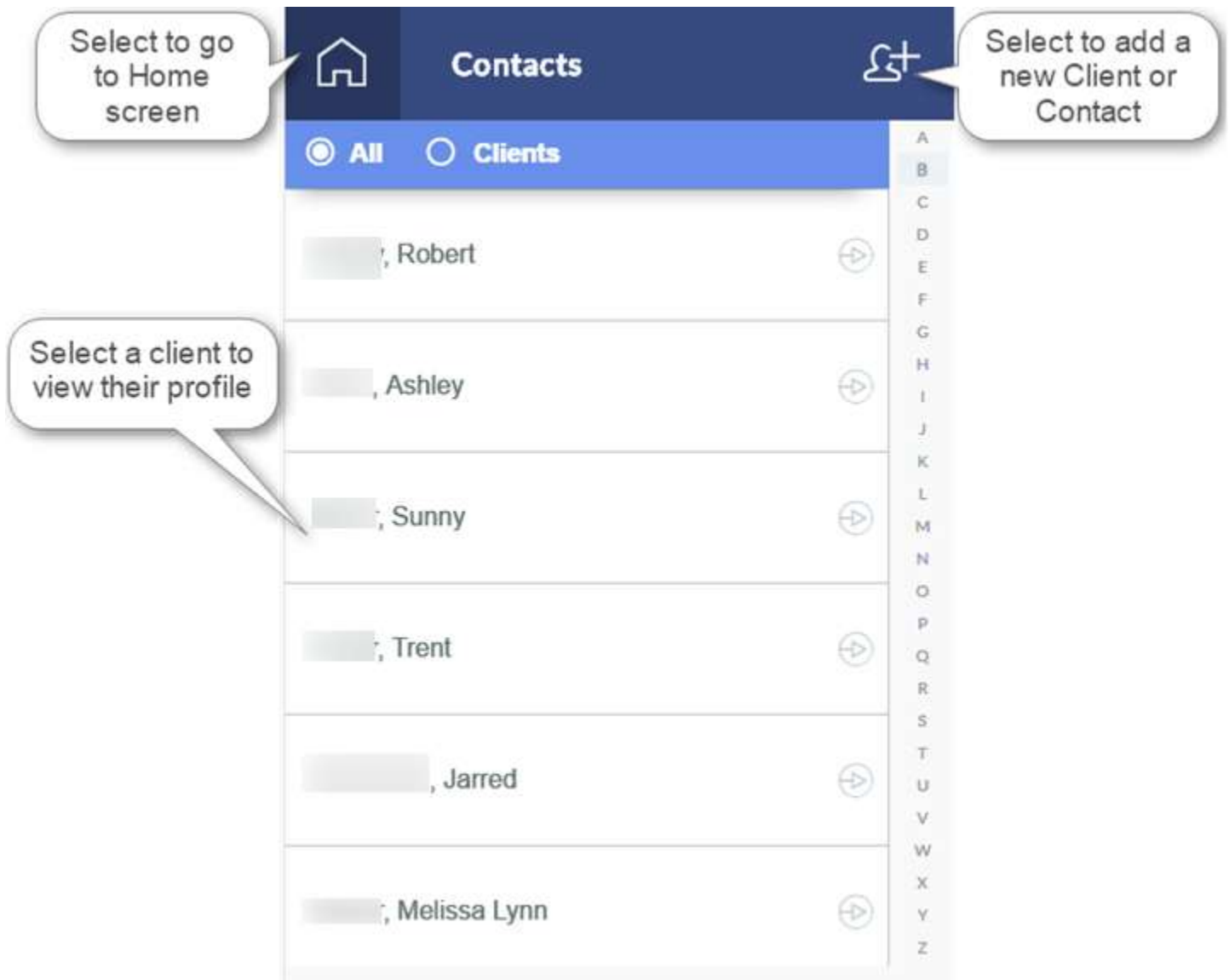
The screenshot shows the TXDocs Home page with the following callout boxes:

- TXDocs Home page**: Points to the top banner area.
- Search for Clients or All Contacts**: Points to the search bar.
- View and Add Contacts or Clients**: Points to the Contacts icon.
- View and Create appointments**: Points to the Calendar icon.
- Create and View tasks**: Points to the Tasks icon.
- Change personal settings**: Points to the Setup icon.
- Tap on phone number to call support**: Points to the phone number in the footer.

The page features a search bar with a magnifying glass icon, radio buttons for 'All' and 'Clients', and four main action tiles: 'Contacts' (with a person icon), 'Calendar' (with a calendar icon showing '11'), 'Tasks' (with a clock icon), and 'Setup' (with a gear icon). The footer includes the website 'txdocs.com', the phone number '(210) 253-9506', and 'TXDocs Training'.

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

Contacts Home



- 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

Home page

Profile Page

Previous page

tap here to view a list of the clients phone numbers

Call the client on the selected phone number

Email the client

View the clients address on a map

Create an appt linked to the client

Create a task linked to the client

Create a Time slip or Expense slip for the client

Edit the client

Delete the client

Delete

Edit

-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

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

The screenshot shows a mobile application interface for creating a time or expense slip. The interface is divided into several sections with callouts explaining their functions:

- Home page:** A home icon in the top left corner.
- Save:** A save icon in the top right corner.
- Choose time or expense slip:** A toggle switch between "Time slip" (selected) and "Expense slip".
- Choose the date for the slip:** A date field showing "09/07/2016" with a calendar icon.
- Remove client from slip:** A red icon with a minus sign next to the client name.
- Select the clients case:** A dropdown menu showing "divorce".
- Select an option that suits your case:** Radio buttons for "Hourly" (selected), "Fixed rate", and "Pro bono".
- Select the amount of time spent if applicable:** A dropdown menu showing "00" for hours.
- Select the rate you want to charge for this case:** A dropdown menu showing "15" for minutes.
- Save slip:** A "Save" button at the bottom right.
- Cancel the slip:** A "Cancel" button at the bottom left.

The form includes the following fields and values:

- Date: 09/07/2016
- Client: Caleb
- Select case: divorce
- Description: Extra details about the time spent.
- Hourly rate: 15
- Minutes: 00
- Total: \$ 125.00

-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

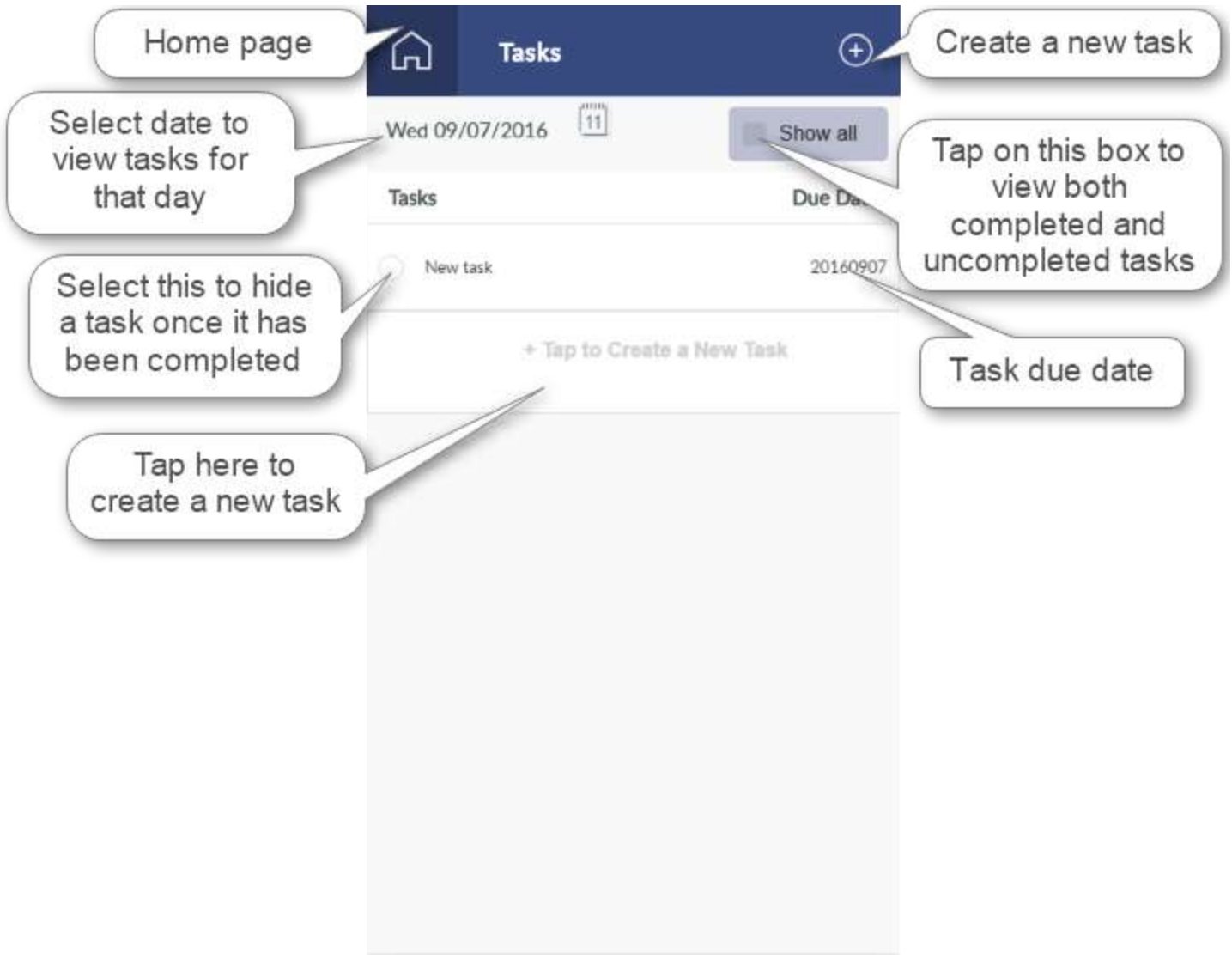
The screenshot shows the 'Add Appointment' screen with the following callout boxes:

- Home page:** Points to the home icon in the top left navigation bar.
- Select either of these to change the start and end time of an appointment:** Points to the 'Starts' and 'Ends' fields.
- Appt description must be entered to allow saving of the appt.:** Points to the 'Description' text input field.
- Optional: assign appt. to a client:** Points to the 'Search client' dropdown menu.
- set a reminder for an appt. via Text or Email. You can customize the time beforehand at which you are reminded.:** Points to the 'Reminder' section.
- You can choose up to two reminders, one of each if you desire:** Points to the '+ Add a Reminder' button.
- Cancel Appointment:** Points to the 'Cancel' button at the bottom left.
- Save Appointment:** Points to the 'Save' button at the bottom right.

The form fields and their current values are:

- Date & Time:**
 - Starts: 09/02/2016 | 4:00 PM
 - Ends: 09/02/2016 | 5:00 PM
- Description:** Appointment Description
- Search client:** Search term
- Reminder:** Text, 15 Minutes
- Optional Note:** (Empty text area)

Tasks Home



Add tasks

The screenshot shows the 'Add task' screen of a mobile application. The interface includes a dark blue header with a home icon, the title 'Add task', and a back arrow. Below the header are several input fields: 'Due Date' (with a date picker showing 09/02/2016), 'Subject' (an empty text field), 'Search client:' (with a 'Search term' field and a client icon), and 'Description' (a text area containing the placeholder text 'This is a task that needs to be done'). At the bottom, there are two buttons: 'Cancel' (with a red X icon) and 'Save' (with a red floppy disk icon). Callout boxes provide instructions for each element: 'Home page' points to the home icon; 'Select the date for the task' points to the date picker; 'Save task' (top right) points to the floppy disk icon in the header; 'Previous page' points to the back arrow; 'Enter a subject for the task (Must be done)' points to the subject text field; 'Link a client to the task. (Optional)' points to the client icon; and 'Cancel task' and 'Save task' (bottom) point to their respective buttons.

Home page

Select the date for the task

Save task

Previous page

Enter a subject for the task (Must be done)

Link a client to the task. (Optional)

Cancel task

Save task

Setup

The screenshot shows the 'Setup' screen with a dark blue header. On the left, a home icon is labeled 'Home page'. On the right, a back arrow and a save icon are labeled 'Previous page' and 'Save preferences' respectively. The main content area is titled 'Preferences' and includes several settings:

- Appointment Default Duration:** A dropdown menu currently set to '60 minutes'. A callout states: 'You can choose your default appt. duration'.
- Default reminder Method:** A dropdown menu currently set to 'Text'. A callout states: 'You can choose either Text or Email as your default reminder'.
- Workday starts at:** A text input field containing '7 : 00 AM'. A callout states: 'This time will be the time where your calendar starts each day'.
- Workday ends at:** A text input field containing '5 : 00 PM'. A callout states: 'This will be the time that your calendar ends each day'.
- Email:** A text input field containing 'support@txdocs.com'. A callout states: 'Your Email you want reminders sent to'.
- Mobile Phone:** A text input field containing '210-253-9506'. A callout states: 'Your phone number where you want Text reminders sent'.

At the bottom, there is a section for 'TXDocs Support' with two radio buttons: 'Call Support' and 'Email Support'. A callout states: 'Select to call TXDocs Support' pointing to the 'Call Support' option, and another callout states: 'Select to start Email to TXDocs Support' pointing to the 'Email Support' option.

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

Setup continued

The screenshot shows a mobile app setup screen with the following fields and buttons:

- 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 (with a red X icon)
- Save changes: Save (with a green floppy disk icon)
- Logout
- Refresh data
- Clear local cache
- Send debug log

Callouts provide additional information:

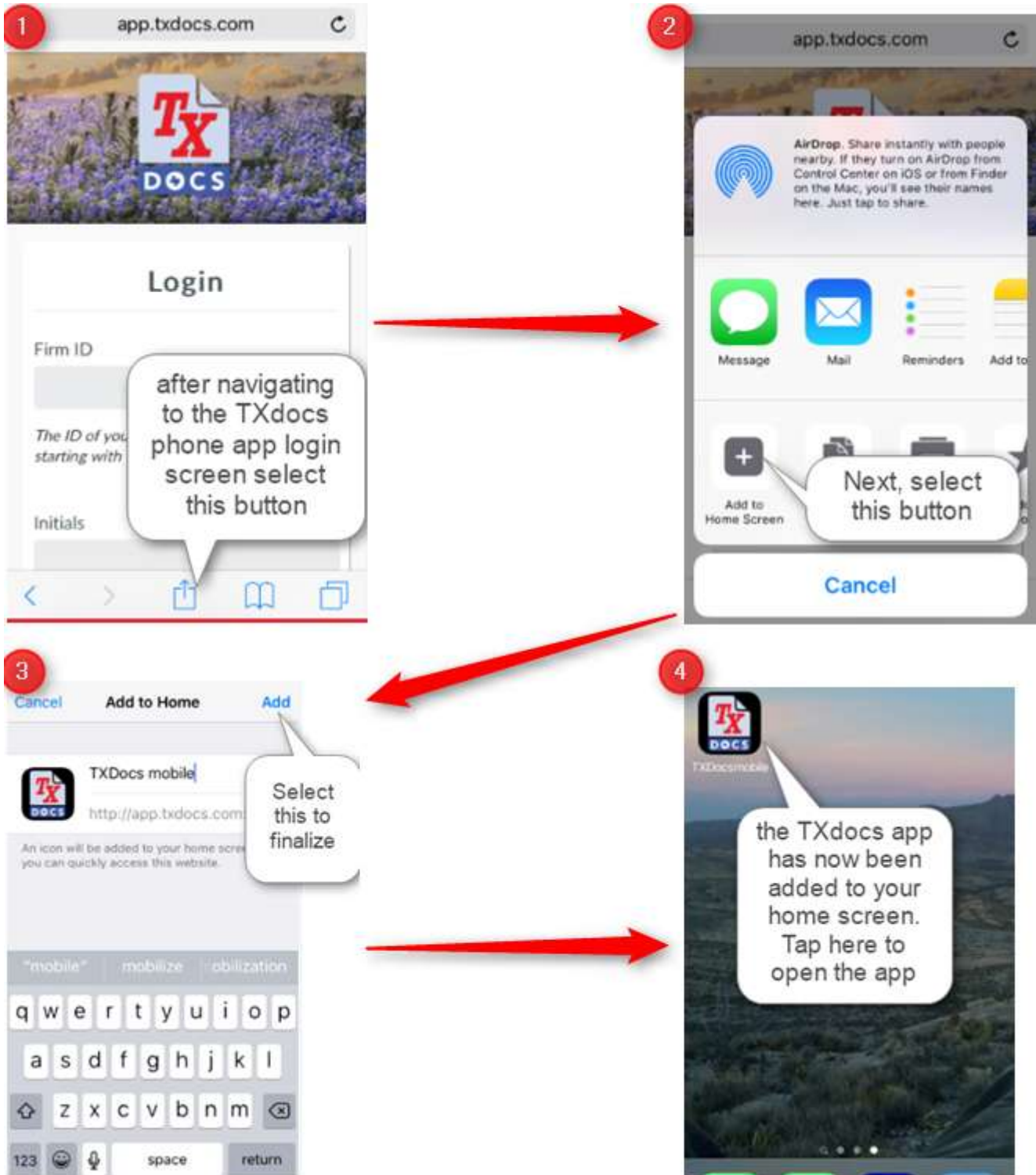
- Cancel changes:** A red X icon is next to the Cancel button.
- Save changes:** A green floppy disk icon is next to the Save button.
- Refresh data:** If changes made in TXDocsPlus have not synced to the phone app, tap on this button to Force a data refresh.
- Send debug log:** If you are experiencing 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

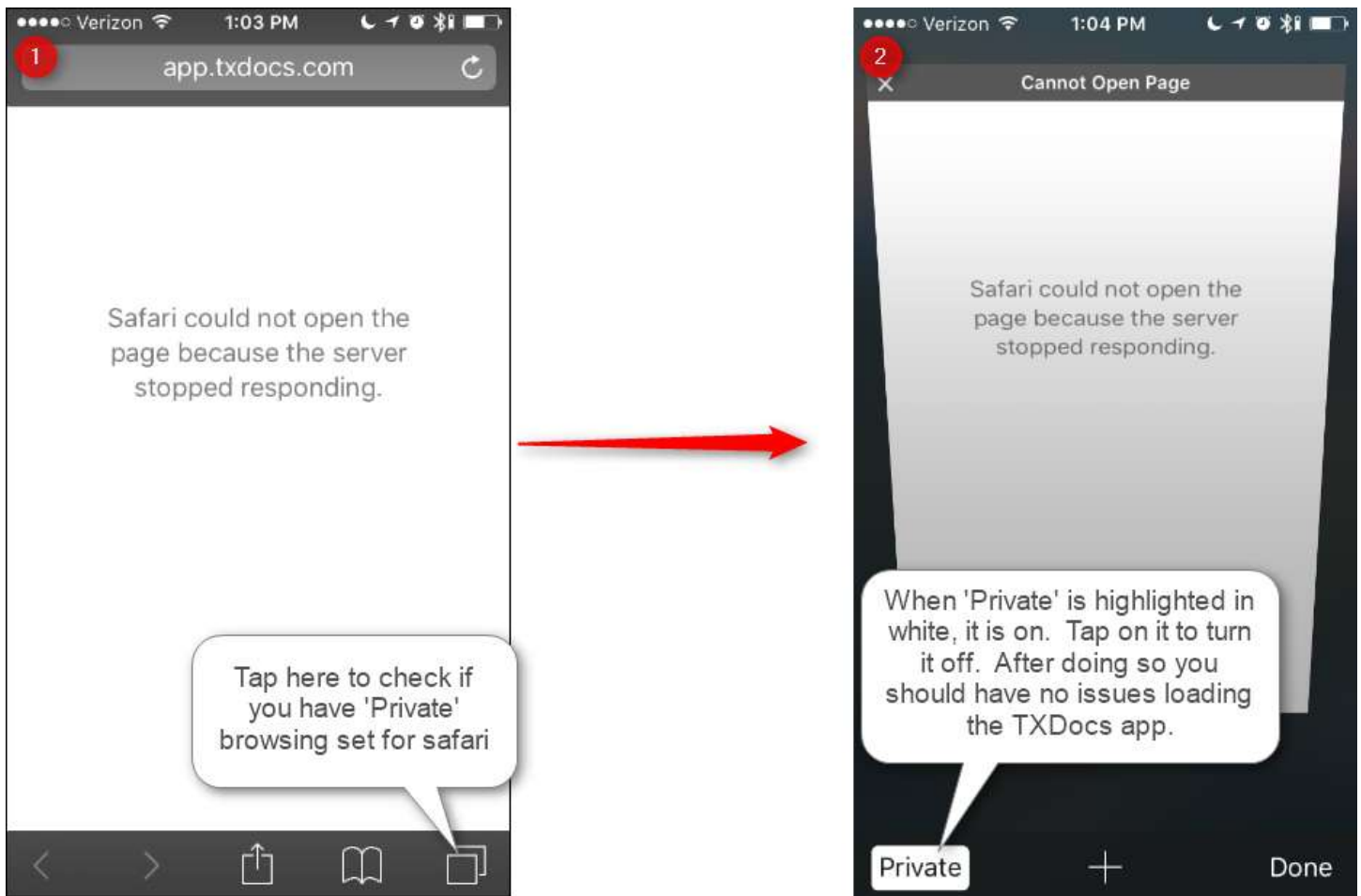
Adding the TXDocs app to your home screen will save you time make it easier for you to access the app and will save you time. You will also stay logged into the app until you manually log out.

-Begin by opening Safari and enter this web address; app.txdocs.com



Turn off Private browsing in Safari

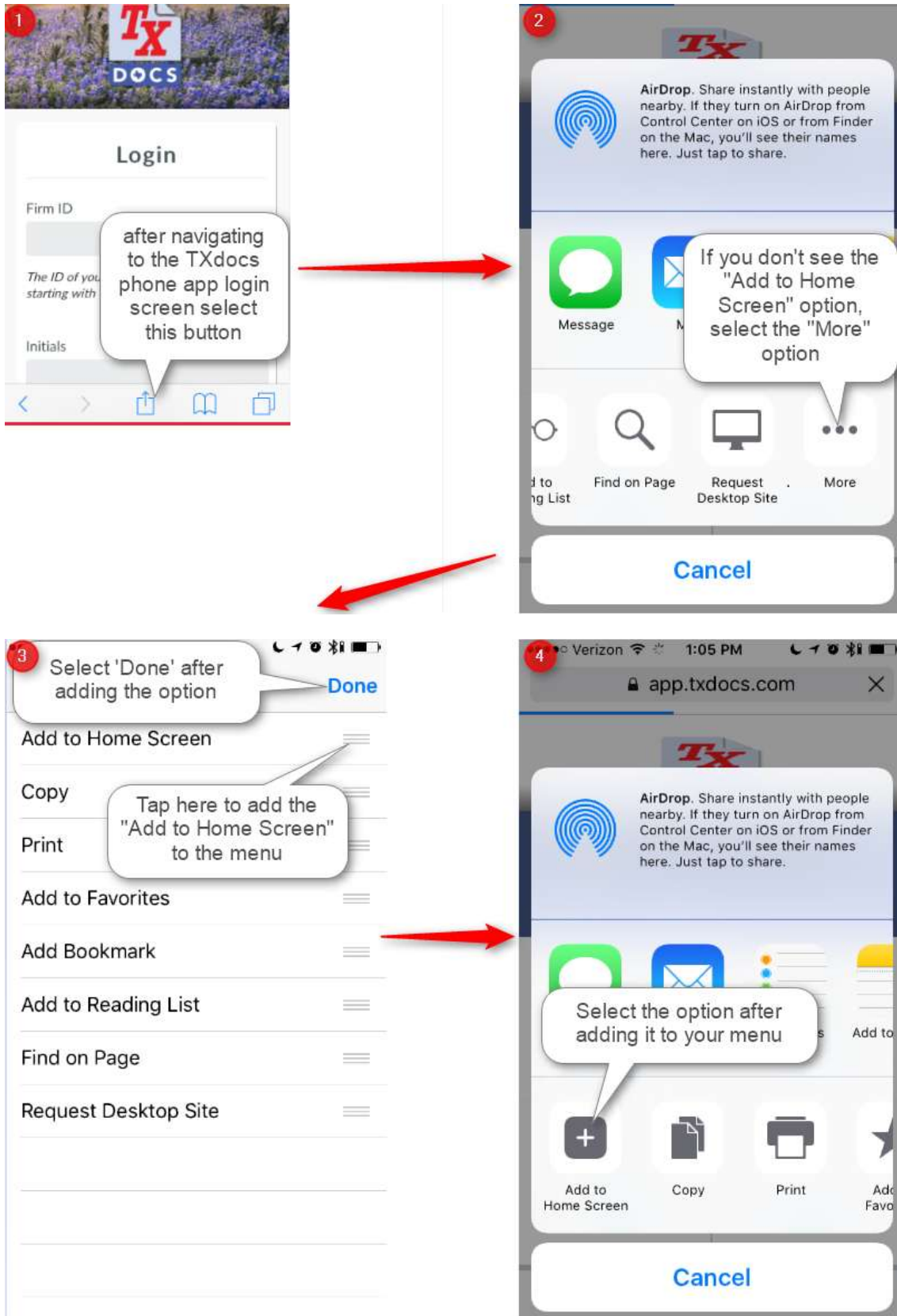
Start by opening Safari and then follow the instructions in the images below to turn off 'Private' browsing.



-Private browsing only needs to be turned off temporarily and can be turned back on after the TXDocs phone app has been 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

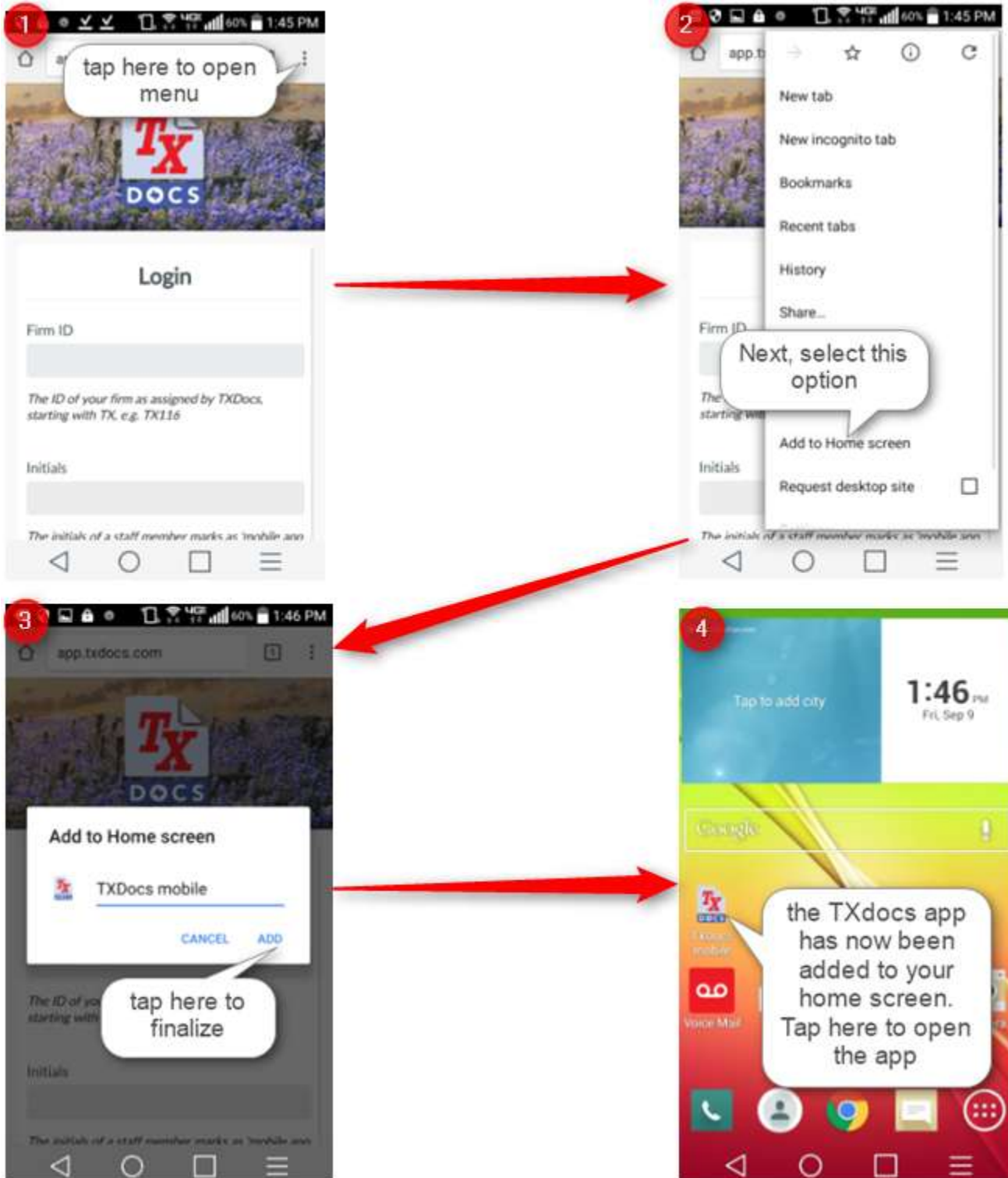
Follow the instructions in the images below to find the option for adding the TXDocs app to your home screen.



Android- Adding TXDocs app to home screen

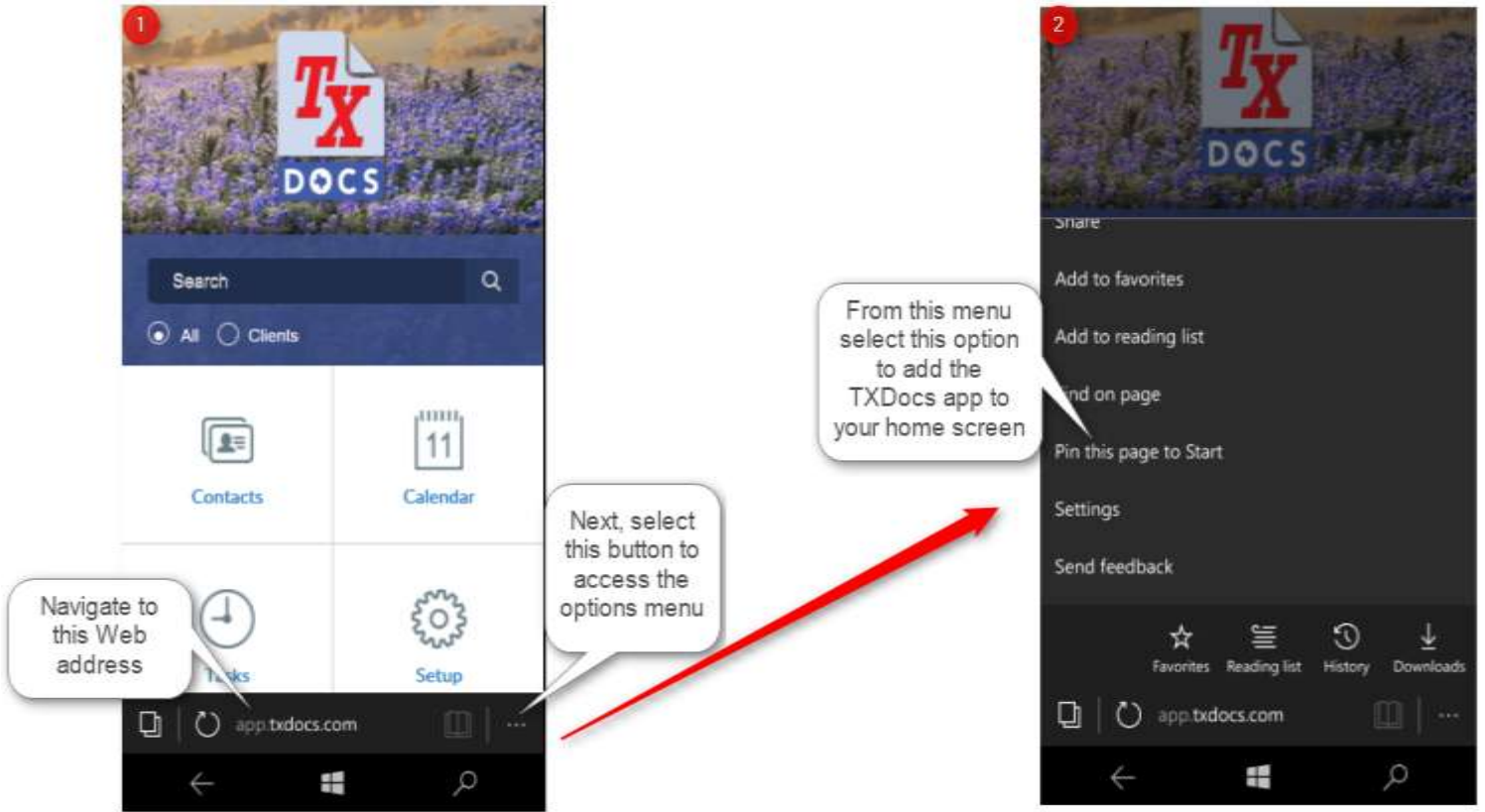
Adding the TXDocs app to your home screen will save you time make it easier for you to access the app and will save you time. You will also stay logged into the app until you manually log out.

-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.