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# Introducing the TXdocs Editor

Lunch and Learn Series

Welcome! The webinar will start at 12:00 O'clock.

Presented by: Dries Driessen, Chief Technology Officer



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# Welcome

- Questions? Please submit them using the questions box of the GoToWebinar side panel
- 1 hour of CLE credit – proof of your attendance will be submitted to the bar. Provided that you've given us your bar number.
- Webinar will be recorded - you will receive an email with a link to the recording.

# Agenda



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- What is the TXdocs Online Editor?
- Getting started
- Assemble and Edit the document
- PDF support
- TXdocs menu
- Document recovery
- Common messages explained
- Licensing
- Q&A



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# What is the TXdocs Online Editor

- Word processor like Word
- Documents are saved in Word format, either .doc or .docx
- Integrated into TXdocs
- Changes to answers are saved in the TXdocs case
- Eliminates the need to download documents. Just review the document and eFile it without uploading
- Keeps documents in 1 place: the Anywhere case folders
- Extra features
- Not compatible with TXdocs Classic



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# Getting started

- Go to the Settings menu in the TXdocs ribbon
- Click on 'Select Word processor' and select the TXdocs Editor

# Assemble and Edit



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- “Open link” displays automatically after assembly
- Document is opened in an online word processor
- Document is editable and has fields for the answers
- Document can be printed
- Document can be downloaded
- Document can be saved as a PDF
- Fields will not be visible in Word or when saved to a PDF

# Editing fields



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- Edits to fields propagate to other occurrences, even in other open documents of that same case
- Blue fields – editable in the document and in the side panel
- Light purple fields – calculated fields, editable only in the side panel
- Gray fields – calculated fields, editable but removes the field and the automatic calculation

# Field Navigation



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- Next/Previous buttons in side panel to move between fields
- Tab to move to the next field
- Shift+Tab to move to the previous field
- TXdocs menu allows for skipping to the next/previous blank field
- TXdocs menu allows for searching through answers exclusively



# Saving



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- Saving the document not only saves the answers in the document, but also saves the answers to the case in TXdocs
- Answers will be updated in TXdocs, ready for reassembly
- On re-opening a document, the answers in the document are checked against TXdocs to ensure they're up to date.



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# PDF

- Fields are editable and saved to the document and to TXdocs
- Can't change the text of the PDF itself



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# New Documents

- New case document – saved to case folder
- New firm document – not saved to a case folder
- Upload documents from your pc



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# TXdocs menu

- Send document to your client using Online Intake's Document Exchange
- Insert signatures
- Insert addresses



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# Document recovery

- Your documents are saved automatically to prevent losing your edits.
- Recovered documents will not have fields but will have all the answers and edits to the document
- Recovered document dialog will popup automatically when editor is opened.



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# Common messages explained

- Document lock – a document can only be edited by 1 person at a time (1 tab)
- Case lock – a case can only be edited by 1 application at a time: an open document prevents document assembly for the same case



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# Concurrent License

- TXdocs Editor is part of TXdocs – no extra fee required
- Each TXdocs license allows multiple open documents open in a single browser
- You can have documents open of multiple cases
- Concurrent license: each license of TXdocs allows multiple open documents in a single browser.
- You can take over documents from other browsers when needed

## Q&A



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- GoToWebinar sends an email to prove your attendance
- You will receive another email with a link to this webinar's recording.
- Visit our booth at the Advanced Family Law CLE in San Antonio: Aug 5-8, 2024
- Thank you for attending. And as always, let us know how we can serve you better!