TXdocs Tips and Tricks



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There are several versions of TXdocs. This booklet was prepared using TXdocsPlus Anywhere. That is the cloud version of TXdocs and it contains TXdocs' practice management features (PLUS practice management).

If you are using a different version of TXdocs some of these tips may not be applicable to you.

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12.4	The TXdocs Facebook user forum is where users meet to exchange ideas and information
12.5	There is an extensive library of videos to help you learn everything there is to know about TXdocs

1 Menu/Set up Options

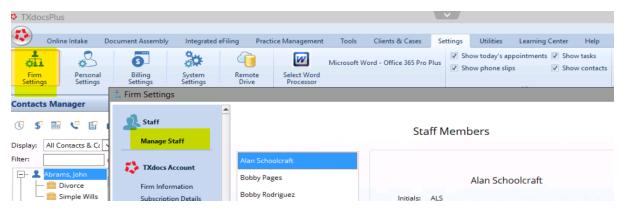
The TXdocs Main Menu uses tabs to group related features together. To customize TXdocs go to the Settings tab.

TXdocsPl	lus										
🐼 Or	line Intake D	ocument Assembly	Integrated (Filing Pract	ice Management	Tools	Clients & Cases	Settings	Utilities	Learning Center	Help
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Firm Settings	Personal Settings	Billing Settings	System Settings	Remote Drive	Select Word Processor					View	

1.1 Digital Signatures - let TXdocs automatically insert digital signatures

Under Texas Rules of Civil Procedure 21(f)(7), you can digitally (electronically) sign documents that are being eFiled. Digitally signing documents is a great time and resource saver because you do not have to print the document just to sign it and then scan it back in.

When you add an attorney to your firm's staff list you can tell TXdocs to insert either "/s/" or an image of the attorney's signature into pleadings and other documents generate in TXdocs.



1.2 Remote Drive Sync - use DropBox, OneDrive or GoogleDrive to synchronize file changes

When you download and edit a document that was assembled in TXdocs, then the edited version on your computer is different from the original copy that is still in TXdocs in the cloud.

Among other things, this means that you will not be able to reliably use the document you find in TXdocs' document manager because it will not contain the edits you made after download.

DropBox, Google Drive and OneDrive are free programs that will automatically synchronize all changes you make to a document on your computer with the original copy that is still in the cloud.

You can set up TXdocs to work with any of these programs using the Remote Drive option in the Settings tab.

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. 🍪	Online Intake	Document Assembly	/ Integrated eFili	ng Pract	tice Management	Tools	Clients & Cases	Settings	Utilities	Learning Center	Help
Firm Settings	Persona Settings		System Settings	Remote Drive	Select Word Processor	Microsoft W	/ord - Office 365 Pro P	lus	ow today's ap ow phone slip	opointments 🗹 Sho os 🐼 Sho View	w tasks w contact

1.3 Spell checker - let TXdocs check your spelling

The TXdocs spell checker works throughout TXdocs to help you avoid embarrassing spelling errors.

To enable TXdocs' spell checker go to Personal Settings which is found on the Settings tab.

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	Online Intake	Document Assembly	Integrated eFiling	Pract	tice Management	Tools	Clients & Cases	Settings	Utilities	Learning Center	Help
Firm	Perso	nal Billing		emote Drive	Select Word Processor	Microsoft V	Vord - Office 365 Pro P	us	w today's ap w phone slip	pointments 🗹 Sho s 📝 Sho View	w tasks w contacts
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Display:	All Contacts	General		Mic	crosoft Word - Off	ice 365 Pro	Plus 🚺	Change w	ord processo	or	
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	Abrams, John - 💼 Divorce	List Preference									
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	- 🚾 Bell Fam Bumford, Igna										
	Capper, Cecil	23 Calendar									
	Client, New - 💼 Probate	Calendar		🕑 Ena	able Spelling Cheo	:ker					
	Conway, Robe - 💼 Divorce	Workspace		🗹 Rev	view previous ans	wers					

1.4 Close/Reopen Clients & Cases instead of deleting them

If you delete a Client then you will lose all information about that client and all cases under that client. Likewise, when you delete a case you lose all information, including answers. Additionally, if you want to use conflict checker, that client and case will no longer exist so conflict checker won't search them.

Instead or deleting clients and cases, just close them. That way they won't clutter your clients and cases lists and you can reopen them if you ever need to do more work for them.

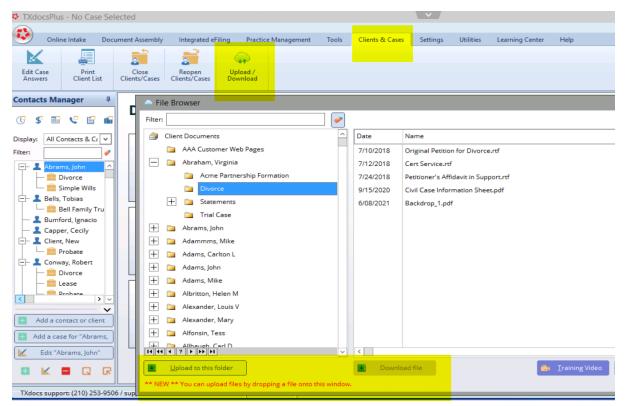
The options to Close and Reopen clients and cases are found on the Clients & Cases tab.

TXdocsPlus	s - No Case Se	lected									
Onlir	ne Intake Doo	ument Assembly	Integrated eF	iling Practic	e Management	Tools	Clients & Cases	Settings	Utilities	Learning Center	Help
K	ļ										
Edit Case Answers	Print Client List	Close Clients/Cases	Reopen Clients/Cases	Upload / Download							

1.5 Upload/Download files between your PC and the Cloud

When you click on the Upload/Download option on the Clients & Cases tab, you will be able to upload and download files between your PC and the Documents Manager in TXdocs.

Simply select a case and you will see a list of all files in that cases' folder. Use the Upload to this folder button to add files from your PC or the Download file button to download files to your PC.



NOTE: You can also drag files from your PC and drop them into the selected case folder.

1.6 Recently Assembled - quickly find documents you assembled recently

If you need to edit, download or reassemble a document that you recently assembled, the quickest way to find it is by using the Recently Assembled option on the Document Assembly tab.

TXdocsPlu	is - No Case S	elected						× /			
🐼 Onli	ne Intake Do	cument Assembly	Integrated e	Filing Practic	ce Management	Tools	Clients & Cases	Settings	Utilities	Learning Center	Help
1		×			F						
Assemble Documents	Recently Assembled	Practice Tools	Tables of Contents	Create Form Sets	Quick Text	Format Wizard					

1.7 Find A Form - find a form anywhere in TXdocs

We often get calls asking "does TXdocs have a ______ form?" The Find a Form button was created to help you find a desired form anywhere in TXdocs. The Find a Form button can be found on the Document Assembly tab.

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	🧷 Onli	ne Intake	Document Assembly	Integrated e	Filing Practi	ce Management	Tools	Clients & Cases	Settings	Utilities	Learning Center	Help
		2	×									
	ssemble cuments	Recently Assemble		Find a Form	Create Form Sets	Quick Text	Format Wizard					

When you type a search term, TXdocs first scans the practice area selected for the best results. The titles and bodies of forms in all practice areas are also scanned for possible matches. If the initial results don't have what you're looking for, click 'Show additional results' to view other options.

All Forms 💿 Local Forms		
ractice area Chapter Tamily Law (Longino) V All V Q red	×	This form is used to execute a contract for legal services between an attorney and a client. It provides for an explanation of the services to be rendered to the client, explains the billing procedures of the law firm with
R 🗔 Favorites 🏠	Sort by: Chapter 🗸	options for different billing processes and describes the duties of both the
Additional search results lesults with the search term found in the body of the forms and in other practice areas.	Show additional results	[CUSTOM LETTERHEAD] ATTORNEY RETAINER AGREEMENT
1. Client Matters	^	On **, [Name of client(s)] hired ** to
1.02 Attorney Retainer Agreement	☆ 🛛	represent [Name of client(s)]'s interests in a pending or contemplated * *, the "Scope of Work" for which Law
1.04 Initial Letter Enclosing Attorney Retainer Agreement	☆ 🖉	Firm is being retained, (more commonly referenced throughout this
2. Initiating an Action		Agreement as the client's "family law matter" or "matter"), by entering into this Attornev Retainer Agreement.
2.14 Return of Service on Individual Defendant - In Person	☆ 🗹	5 , 5
7. Property Transfers		Representation will not commence, nor any attorney-client relationship be formed, until a signed copy of this agreement and the
7.12 Assignment of Right to Return of Utility Deposits	☆ 团	payment requested below have been received.
7.22 Change of Address (Tax Returns)	☆ 🗹	Parties to the Agreement
8. Retirement		1. The parties to this Attorney Retainer Agreement are
8.01 Letter to Plan Administrator - Temporary Orders	☆ 🗹	[Name of client(s) - without conjugation] and **, referenced as "Client" and "Law Firm," respectively, throughout this
8.04 Records Authorization for Retirement and Employee Benefits	☆ 🗹	Agreement.
8.06 Order Dividing Employee Federal Retirement System Benefits	☆ 团	2. ** will be the designated attorney handling
8.07 Order Dividing Military Retired Pay	☆ 27	Client's matter by Law Firm, but Law Firm may, as needed, also use other paralestal assistants and staff members or employees of

1.8 Format Wizard - tell TXdocs how you want assembled docs to be formatted

Set you preferences once to style all the documents you assemble. There are hundreds of ways that you can customize how your assembled documents look in TXdocs. You can choose a style preset, and also set options for (1) All document types (2) Pleadings & Orders (3) Agreements & Contracts (4) Letters and (5) Individual forms.

Add multi-line footers, customize your font selection, line spacing, paragraph settings, and more.

The Format Wizard option can be found on the Document Assembly tab.

Client cuments Form	Create Form Sets	Quick				
Socument Format Wizard		Text	Format Wizard	TXdocs Editor		
Style Presets Pleadings & Orders Agreements & Contri Letters Individual forms	The recent of th	odern Style Prese commendation: ypography for L ome notable sett font: Open Sans multi-line footer int size titles are bold, no int size titles are bold, no int size int size int size int size int size set aligned paragino for all docume Select eview document	et Apply Moc preset follows as a sound in Lawyers". tings are: (for , 12pt with page n ot underline- graphs nt ent types Font Size: style	of our preset style dern Style ws the n Matthew Butteri r pleadings) umber and smalle d or italicized 12 Font Namee (recommer Sans, Time	ick's er : Open Sans ided fonts: Bool s New Roman)	ays modify the details to suit your own personal style. Fraditional Style Preset Provide Preset Apply Traditional Style The traditional style configures the format wizard to the classic TXdocs styling. Some notable settings are: (for pleadings) - font: Times New Roman, 12pt - single line footer with 'page of pages' numbering - titles are bold - 15 line spacing - left aligned paragraphs - italicized subheadings - 0.5 first line indent k Antiqua, Century Schoolbook, Franklin Gothic, Open
				mat Wizard apply to	all staff in your	
	Agreements & Contr Letters	Agreements & Contracts Letters Individual forms 	Agreements & Contracts Letters Individual forms The modern style recommendation "Typography for Some notable set - font: Open Sans - multiline footar - titles are boid, n - 1.25 line spacing - left aligned para - no first line inde Font for all document Select Preview document Preview	Agreements & Contracts Letters Individual forms Some notable settings are: (fo - Font: Open Sans, 12pt - multi-line footer with page in foot size - titles are bold, not underline - 1.25 line spacing - left aligned paragraphs - no first line indent Font for all document types Select Font Size: Preview document style Preview Pleading	Agreements & Contracts Letters Individual forms Modern Style Preset Modern Style preset follows the recommendations as found in Matthew Butter "Typography for Lawyers". Some notable settings are: (for pleadings) - Font: Open Sans. 12pt - multiline footer with page number and small font size - titles are bold, not underlined or italicized - 1.25 line spacing - left aligned paragraphs - no first line indent Font for all document types Select Font Size: 12 Font Name (recommen Sans, Time Preview Decading NOTE: Selections in Format Wizard apply to NOTE: Selections in Format Wizard apply to	Agreements & Contracts Letters Individual forms Modern Style Preset Some notable settings are: (for pleadings) - Font: Open Sans, 12pt - multi-line footer with page number and smaller font size - Ittles are bold, not underlined or italicized - 1.25 line spacing - left aligned paragraphs - no first line indent Font for all document types Select Font Size: 12 Font Name: Open Sans, Times New Roman) Preview document style

2 Assembling Documents

2.1 Let TXdocs help with your document assembly.

One of the greatest time saving benefits in TXdocs is its ability to save and reuse your answers throughout the case. Enter a name one time and you never have to retype it again in that case. TXdocs will prefill the information for you. To take full advantage of this feature, create a case for your client, then select that case prior to assembling pertaining documents.

2.2 Use the Clients & Cases Manager to easily add, edit and select cases for document assembly.

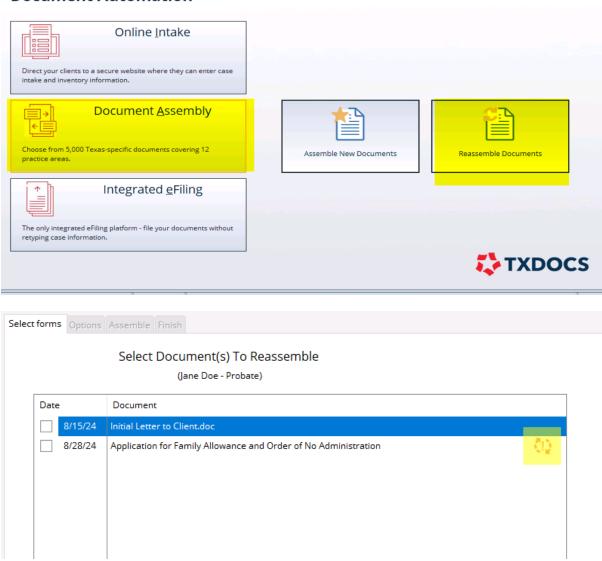
Add your clients and cases. As your list grows, use the filter option to quickly find what you're looking for.

TXdocsPlus - ACTIVE CASE: Clint Client - Trust for B	en			× .	
Online Intake Document Assembly	Integrated eFiling Tools	Clients & Cases Settings	Utilities Learning Center	🜟 Subscribe (520 days left)	Help
🔚 😩 😵				2	
Assemble Recently Practice Documents Assembled Tools		Create Quick Form Sets Text	Format TXdocs Wizard Editor	Preview a different version	
Clients & Cases Manager 4	loin the theurseds of	Toyos atterneys who	are practicing smarte		
Display: All Clients, Cases & Prospects	We even offer you a mo			r with TAGOLS.	
Filter:					
	Document A	Automation	0		
			•		
Will					
- 💄 Doe, Jane			Online <u>I</u> ntake		
Probate					
F- L Klingensmith, Karlee				0.000	
Sample, Susie					
Divorce		Direct your clients to a se case intake and inventory	cure website where they can en information	ter	
- Smart, Tex		,			
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		→ Do	ocument <u>A</u> ssembly	/	
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		Access thousands of Toxy	as-specific forms covering 12 pra	actico	
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			ntegrated <u>e</u> Filing		
	and a second second second				
< >					
`		The only integrated eFilin	g platform - file your documents		
🕂 Add a Client 🛛 🗸		without retyping case info			
Add a case for "Client, Clint"					
Edit "Client, Clint"					

2.3 Reassemble Button - quickly select a previously assembled form to reassemble

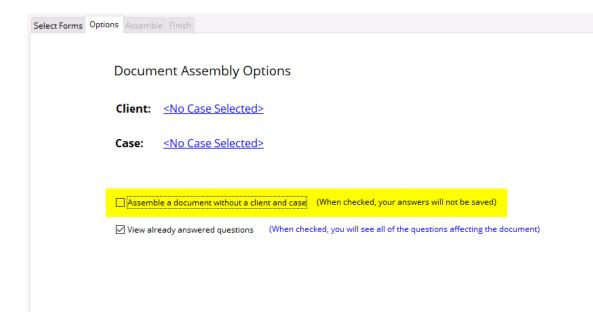
If you need to reassemble a document to make a change, use the Reassemble button to avoid having to answer all the setup information like selecting a case, selecting the document, etc. If you previously started assembling a document, but quit and saved before finishing, the document will be identifiable by this symbol \mathbb{Q} .

Document Automation



2.4 Creating one-off documents.

Sometimes you just need to create a quick, one-off document for a task and you don't need to save it to a client or a case. For those rare instances, you can click the 'Do not use a case checkbox' and then TXdocs won't require you to select a client and case. (Your answers will be discarded after you assemble the document(s).



2.5 Expand/Contract Buttons - hide/unhide the forms underneath each chapter heading

If you want to hide all the individual forms so that you can quickly scroll to your desired chapter and then

see only the forms in that chapter, just click the Collapse LK' button. Then, scroll to the chapter you want and click the "+" to see all the forms in that chapter.

To reverse this and display all forms in all chapters, click the Expand Ly button.

You will find these same buttons on similar lists throughout TXdocs.

(Note: You can change whether forms lists are initially shown as expanded or collapsed in Personal Settings.)

Select Forms Options Assemble Finis	h					
All Forms 💿 Local Forms) Form Sets					
Practice area	Chapter					
Family Law (Longino) 🗸	All		\times			
Favorites 🔂		Sort by:	Chapter			\sim
*****Longino's Texas F	amily Law*****					^
∧ 0. Intakes						
0.01 Blank Child Custody Stra	tegy Intake			చ	Z	
0.02 Divorce Information Inta	ke			÷	2	
Blank Divorce Inform	ation Intake			£	2	
0.03 Non-Divorce Family Law	Intake			£	2	

2.6 Local Forms - this tab lets you select from hundreds of county local forms

While selecting forms to assemble, you can find local forms for your county on the Local forms tab. Jump to your county by typing the first few letters of the county name. To set a county as your default, click the \mathbb{Q} icon at right. The default county will display at the top of the list.

Select Forms Options Assemble Finish		
All Forms Occal Forms		
Practice area	~	
Family Law (Longino) ✓ Q Search forms	×	
R Q Favorites ☆		
Andrews County		Q ^
Standing Temp Order on Children, Property and Conduct of Parties (Andrews)	ۍ	3
Angelina County		G,
Joint and Mutual Standing Order on Children, Property, and Conduct (Angelina)	☆	Ø
Order Requiring Completion of Childrens Interest Seminar (Angelina)	☆	2
Standing Scheduling and Discovery Order in CPS Cases (Angelina)	☆	Ø
Aransas County		G,
E-filing Service Request (Aransas)	5	Z
Standing Order (Aransas)	the second secon	2
Archer County		Q.
Standing Temporary Injunction in Family Law Cases (Archer)	☆	Ø
Armstrong County		G
Standing Order Regarding Children, Property, and Conduct (Armstrong)	☆	2
Atascosa County		G
Process Request Sheet (Atascosa)	5	2
Standing Order (Atascosa)	5	3
Bandera County		G,
Standing Order Regarding Children, Property and Conduct (Bandera)	☆	Ø
Bastrop County		G,
Standing Order Regarding Children, Property, and Conduct (Bastrop)	☆	Ø
Bee County		G,
Standing Order (Bee)	☆	Ø
Bell County		G ¥

2.7 Favorites - select from a list of your most commonly used forms

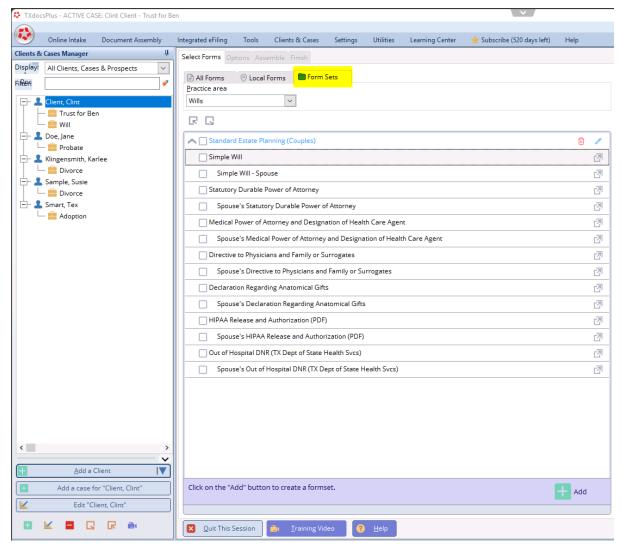
While selecting forms to assemble, the Favorites tab provides a way to very quickly find and select forms that you assemble often. TXdocs will track which forms you use most often and add them to the list. You can adjust the maximum number of favorites added by TXdocs in 'Forms List' option found in

Personal Settings. You can also manually add and remove forms in this list by double clicking the star to the right of the form's title.

🖹 All Forms	💿 Local Forms 🛛 🗁 Form Sets					
ractice area	Chapter	٦				
Family Law (l	.ongino) V All V Q Search forms X					
RG	Favorites Sort by: Chapter	r				
^	1. Client Matters					
1.01	Consultation Agreement	☆	Z			
1.02	Attorney Retainer Agreement	☆	Z			
1.04	Initial Letter Enclosing Attorney Retainer Agreement	숬	2			
^	3. Petition and Responses					
3.01	Original Petition for Divorce	☆				
3.03	Waiver of Service - Divorce					
3.05	Respondent's Original Answer to Petition for Divorce					
3.07	Counterpetition for Divorce					
3.08	Counteranswer in Divorce	☆	2			
^	4. Decree, Findings and Agreement					
4.01	Final Decree of Divorce					
^	5. TROs and Temporary Orders for Divorce					
5.03	Motion to Extend Temporary Restraining Order - Divorce					
5.06	Motion for Temporary Orders (Divorce)					
5.07	Notice of Court Proceeding for Temporary Orders and Order to Appear - Divorce	☆	Z			
5.08	Temporary Orders - Divorce					
^	6. Marital Property					
6.01	Inventory and Appraisement	☆	đ			
^	10. Modifications					
10.01	Petition to Modify Parent-Child Relationship	☆	2			
^	11. Suit Affecting the Parent-Child Relationship					

2.8 Place the forms that you frequently assemble at the same time into form sets.

Save time from searching for the same forms over and over again. Organizing forms into sets makes them easily accessible. When you're ready to assemble, select the full list, or just those forms you need.



2.9 Form Help - see a summary description of your highlighted form

You can see information about purpose, contents and uses for the selected form in a small box on the top right of the form selection screen.

The box has a scroll bar on the right so you can scroll through the information. You can also drag the bottom of the box down to enlarge the box.

elect Forms Options Assemble Finish		
All Forms © Local Forms Chapter Practice area Chapter Family Law (Longino) V All V Q Search fi		This form is used by the parties to provide full disclosure of the community property, to partition and exchange that community property nto their respective separate property, and to represent and warrant each party's complete understanding and acceptance of the import and effect of their agreement.
Favorites 🗘	Sort by: Chapter	AGREEMENT FOR PARTITION OR EXCHANGE OF PROPERTY
6.04 Suggested Division of Community Property	☆ 🗗 ^	In consideration of the promises, partitions and exchanges contained in this Agreement, [Name of client - first
6.05 Acknowledgment of Disclosure of Property and Financial Obligations	☆ 🗗	iteration] and **, (the "Parties"), make this Agreement for Partition or Exchange of Property (this "Agreement")
6.06 Agreement for Partition or Exchange of Property	☆ 🗗	pursuant to Article XVI, Section 15, of the Texas Constitution, and Sections 4.102 and 4.103 of the Texas Family Code.
6.07 Agreement for Partition or Exchange of Property (long form)	☆ 🗗	1. The parties stipulate as follows:
6.08 Agreement to Convert Separate Property to Community Property	☆ 27	1. The parties supmane as jonows:
6.09 Motion to Appoint Auditor	☆ 전	1 Pursuant to Section 3.001 of the Texas Family Code, each spouse's separate property consists of the property
6.10 Order Appointing Auditor	☆ 🗗	owned or claimed by that party before marriage; the property acquired by that party during marriage by gift, devise, or
6.11 Motion to Appoint Receiver	☆ 🗹	descent; and the recovery for personal injuries sustained by the that party during marriage, except any recovery for loss of
6.12 Order Appointing Receiver	☆ 🗗	earning capacity during marriage.
6.13 Receiver's Oath	☆ 🖻	2 Pursuant to Section 3.002 of the Texas Family Code, the parties' community property consists of the property,
6.14 Motion to Dissolve Receivership	☆ 🗗	other than separate property, acquired by either party during the marriage. Income or property received from or with
615 Motion to List Real Property	्र स्त्र	essesse to a wantel's successes wasanester Andrew the wands as is assuminates were reter

2.10 Chapters droplist - show only the forms for a selected chapter

Select a chapter from the droplist to display only the forms for the selected chapter.

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	Client Letter -	Initial Disclosures (cases filed before Se	ant 1 2023)							_
		Do Not Settle	.pa 1, 2023)					ය ~	2	_
		Informal Dissolution						23	괴	_

2.11 You can Preview a form template using the Preview button

To preview the highlighted form template, click on the Preview button.

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All forms O Local Forms Form Sets Practice area Chapter Family Law (Longino) Image: Atomety set of the new atomety retained. The new counsel will become the atomety in charge, pursuant to Civel Procedure.	
Image: Construction of the state	^
Filter active MOTION TO SUBSTITUTE ATTORNEY Only showing selected chapter. Press <esc> or click the button to clear the filter.</esc>	
Z5. Attorneys [END OPTIONAL TEXT] Pursuant Rules 3 and 10 of the Texas Rules of Civil Procedure, [Name of movant 1	or motion to substitute atty],
25.01 Attorney Appearance	[state/states] as follows:
Control Substitute Attorney	
2505 Worker & Materia Substitute Attemp	× se between the parties and
2505 Order ([CAPTION]	
25.06 Motion	relationship.
25.57 Order x [OPTIONAL TEXT] [OPTIONAL TEXT]	
25.08 Appear	
Substitute Attorney and [state/states] as follows:	
[OPTIONAL TEXT]1. This is a suit for dissolution of marriage between the parties.	inor for type of adoption].
[END OPTIONAL TEXT][OPTIONAL TEXT]2. This is a suit for dissolution of marriage between the parties and affecting the parent-child relationship.	c.
[END OPTIONAL TEXT][OPTIONAL TEXT]3. This is a suit affecting the parent-child relationship.	
[END OPTIONAL TEXT][OPTIONAL TEXT]4. This is a suit for parentage.	

2.12 Print a blank form template from the Preview window

If you want to print a copy of the highlighted form, open the form in the Preview window as showing in the previous tip. Then click the print button at

the bottom. (*w ith subscription)

		[OPTIONAL TEXT] Certificate of Service	
l	I certify that a true copy of this document was served in	accordance with Rule 21a of the Texas Rules of Civil Procedure on the following on **.	
	[REPEAT][Certificate of service verbiage].		
ŀ	[END REPEAT]		
	**		=
	Attorney for [In: blockINSERT -	sert the type of party (Plaintiff/Defendant) represented by primary attorney for value in C00034L into attorney's signature -C00034L]	
i.	[END OPTIONAL TEXT]		~
	🚍 Print		

2.13 You can see the name of the form being assembled on the bottom of TXdocs

While assembling documents, if you want to see which one you are currently assembling just look on the bottom line of TXdocs.

	Cause number, if known
	54321
	Include notice that this document contains sensitive data
	Bottom
	Bottom
TXdocs support: (210) 253-9506 / support@tx	docs.com TX116 25.02 Motion to Substitute Attorney

2.14 Save lots of time by setting default answers

There are a lot of questions in TXdocs that you usually answer the same way. For example, name of the county where the action is filed is one of the most often asked questions in TXdocs. STOP typing the county every time and instead tell TXdocs to prefill the answer with the county you usually practice in. Then, you only have to type the county in those instances where you file in some other county. There are probably hundreds of questions in TXdocs like this.

To set a default answer, type your most common answer and then click the Set Default button.

Use the 'Edit Default Answers' option found in Utilities to view and edit your default answers.

Previous Next Show Help	Quic <u>k</u> Text	Set Default	<u>Q</u> uit	? <u>H</u> elp
Court Information				
County where case is/will be filed				
* Harris				
Type of court				
District Court				
 County Court at Law 				

2.15 Use QuickText to create a library of answers you can insert using hotkeys

This feature would be used to store generally lengthy answers that you want to be able to select and insert into the blank in TXdocs.

The QuickText button pops up a window where you can select and insert your preferred text into the current answer field.

Note: On this same pop up window you have buttons to create and edit your QuickText library.

3 As:	semble for: John Abrams	- Divorce Finish
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nent		Child under 3 Provisions F9 In regards to Children Under 3; Until the child reaches 3 years of age, t
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506 / su	upport@txdocs.com	

2.16 Copy a case to save time when creating a similar case

Copying a case includes the case answers you've provided during assembly. This can be time-saving, particularly when creating a similar trust for each individual child of your client. To copy a case, right click on the case to open the options menu, then select 'Copy case'.

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2.17 Hot Keys - save time by using hotkeys instead of always clicking buttons

Many buttons in TXdocs have hotkeys which allow you to execute the button without having to get your mouse and then click on the button. To execute a Hotkey press your Alt key and the underscored letter in the button's label.

For example, when assembling documents, you can press Alt+N or Page Down to go to the next screen and Alt+P or Page Up to return to the previous screen.

8 As	ssemble for: John Abrams - Divorce 🛞 Finish
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3 TXdocs Editor

TXdocs Editor is a word processor just like Word[®] that's enhanced with TXdocs features and functionality. With TXdocs Editor, you don't need to download a document to edit it, or upload in order to eFile.

3.1 Select TXdocs Editor as your word processor to save time and

To select TXdocs Editor as your word processor, go to the settings tab and click on 'Select Word Processor'.

🛟 TXdocs				
Online Intake Document Assembly	Integrated eFiling Practice Management	Tools Clients & Cases	Settings Utilities Lea	arnii
Firm Personal Billing Settings		Select Word Processor	 Show today's appointment Show phone slips View 	ts [
Contacts Manager 4	Which Word Processor do you use?			
Image: Solution of the system of the syst	Word processor TXdocs' Editor Microsoft Word TXdocs' Editor Tool is the time-saving word proc subscribers. It integrates with your TXdocs accor your browser, which eliminates the need to dow how TXdocs' Editor will save you valuable time is Click here for a short introduction video Save As DOC DOCX Image: Save As DOC DOCX	cessing solution designed for <i>i</i> uunt and conveniently allows fo wnload/upload documents or	or document edits within	

3.2 Easily review case answers, make additions & edits, and create new documents from scratch.

The information fields in TXdocs Editor make it easy to identify, review and edit case information brought in during document assembly. You can create new documents using TXdocs Editor, too. Incorporate your digital signature and stored addresses, and send documents to your client securely through the client portal.

TXDOCS 🗈 Karlee Klingensmith - Divorce 🗋 Original P	Petition for Divorce.docx	Save document
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1	Image: Second	A TXdocs Navigation Comparison Set DEFAULT Set DEFAULT Name of Petitioner Kordee Klingarsmith Enter the name of the Petitioner as it should appear in legal documents.
	Level of Discovery 1. Pursuant to Rule 190 of the Texas Rules of Civil Procedure, discovery is intended to be conducted in this suit under Level 2. Parties 2. This suit is brought by Karlee Kingensmith, Petitioner, against Lance Kingensmith, Respondent, seeking dissolution of their marriage and resolution of issues affecting the parent-child relationship. 3. Karlee Kingensmith, The last three numbers of Karlee Kingensmith's Texas driver's locense number are 236. The last three numbers of Karlee Kingensmith's Social Security number are 545. Service of Citation 4. No service of citation on Lance Kingensmith is requested at this time. Divorce Jurisdiction 3 Klingensmith, Karlee	Example: JosephL.Smith
		← Previous Next →

4 Tools are software programs that help you perform common/time consuming tasks

You will find buttons to open the software tools on TXdocs' "Tools" menu tab. Many of the tools are also used by TXdocs while assembling documents. For example, if you are assembling a Divorce Inventory, the Inventory tool will open during the assembly for you to enter the inventory data.

TXdocs' Tools include:

Child Support Calculator Divorce Inventory Redactor Annual Account Heirship Tree Annual Account Annual Report Texas Codes Other Attorneys Deadline Calculator Delinquent Support Calculator Proposed Division Probate Inventory Final Account Guardianship Inventory Final Account Amortization Schedule Officials Directory Conflict Checker



4.1 If you just want to enter/edit data and you don't need to assemble a document, it's much easier to just open tools such as the Family Law Inventory, Proposed Division, or Heirship Tree from the menu rather than going through the document assembly process.

Tasks like preparing Inventories, Accountings, Annual reports, etc. can last for several days, entering and editing data as it is received. For those types of tasks, it is much more efficient to simply open the tool using the menu rather than making changes while assembling the document.

TXdocs' tools can be found on the Tools tab.

Tools that apply specifically to Family Law, Probate and Guardianship can be found on the Practice Tools button which is also on the Tools tab.

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Cont	2 0	Guardianship Too Business Tools	ols		ument	Auto	mation						

4.2 You can export to Excel from the Inventory and the Proposed Divison tools

In some courts and counties, attorneys are often asked to provide inventory data as an excel spreadsheet. In both the Inventory and in the Proposed Division tools, there is a button you can use to export your data to an Excel worksheet.

Tools are software programs that help you perform common2/dime

Property Inventory - Robert Conway - Divorce		×
Community Petitioner separate Respondent separate Other property		
Community Estate	Value	^
ASSETS		
Household Items in Possession of Petitioner		
— Roomba Vacuum	100.00	
- Ninja Food Processor	70.00	
Household Items in Possession of Respondent		
Furniture and furnishings at 123 Main Street, San Antonio, Texas 78258	20,000.00	
Motor Vehicles, Boats, Airplanes, etc.		
— 2001 Toyota	6,000.00	
2002 Ford Ranger	3,500.00	
- 2019 Audi A8	52,026.36	
- Vehicle loan - First USA Bank	65,989.98	
- 2019 Suzuki Sidekick	7,450.76	
Vehicle loan - Bank Of America	4,300.00	
Real Estate		
- 123 Main Street	279,000.00	
 Mortgage payable to Mortgage Lender 	110,000.00	
- Debt to Home Equity Lender	4,500.00	
	153,000.00	
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(Hint: To Add an item, simply double-c <mark>lick on the catego</mark> ry you want.)		
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4.3 Probate Heirship Tree lets you print or create a PDF file of the decedent's family tree

Ad Litems and Courts have really begun to appreciate it when TXdocs subscribers hand them this family tree printout that clearly shows all of the heirs and their interest in the estate.

The Heirship Tree tool can be found on the Tools tab by clicking the Practice Tools button.

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4.4 Texas Codes gives you access to 32 Texas Codes (Family Code, Estates Code, TRRC, etc.) with just 2 clicks

No matter what you are in the middle of, you can instantly pop up any of the following 32 Codes and publications with just 2 clicks. There is a powerful search feature that lets you search for keywords in your selected code.

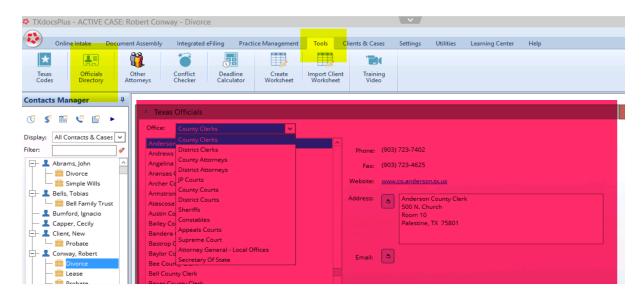
Agriculture Code	Alcoholic Bev. Code	Aux. Water Laws
Bus. & Comm Code	Bus. Org. Code	Civ. Prac & Rem. Code
Code of Criminal Proc.	Education Code	Election Code
Estates Code	Family Code	Government Code
Health & Safety Code	Human Res. Code	Ins Not Codified
Insurance Code	Labor Code	Local Gov. Code
Nat. Res. Code	Occupations Code	Parks & Wildlife Code
Penal Code	Property Code	Sp. Dist/Local Laws
Tax Code	Texas Constitution	TX Rules of Civ. Proc.
TX Rules of Evidence	Transportation Code	Utilities Code
Water Code		
TXdocsPlus - ACTIVE CASE: Robert Conway - Divorce		
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Display: Jump to section	Search	
enter the section number	search keywords or enter the section number	٩
	Advanced search Tip: You can search for keywords (e.g. rights and duties) or section numb	
		start with 154).
	satisfies the requirements for and imposes the duties of signatories to plead Texas Rules of Civil Procedure.	ings, motions, and other papers identified under Rule 13,
Section Title	(b) A digitized signature under this section may be applied only by, a whose signature is represented.	and must remain under the sole control of, the person
E- 2 IIILE 1. THE MARRIAGE	Added by Acts 2015, 84th Leg., R.S., Ch. 1165 (S.B. 813), Sec. 1, eff. Septe	mber 1, 2015.
SUBTITLE A. MARRIAGE		RELATIONSHIP
PROVISIONS		
A. DEFINITIONS	2.001 MARRIAGE LICENSE.	
L 1002 COURT	(a) A man and a woman desiring to enter into a ceremonial marriage	e must obtain a marriage license from the county clerk of
1.003 SUIT FOR DISSOLUTION	any county of this state.	PC
B PUPUC POLICY	(b) A license may not be issued for the marriage of persons of the si Added by Acts 1997, 75th Leg., ch. 7, Sec. 1, eff. April 17, 1997.	ame sex.
TXdoc	Madea by Hold 1997, 70th Leg., Ch. 7, 860. 1, 6h. Aphil 17, 1897.	

The Texas Codes button can be found on the Tools tab.

4.5 Officials Directory gives you instant access to contact information for clerks, courts, sheriffs, etc.

With the Officials Directory you can get phone number, fax number , address, website and email address for virtually every District Clerk, County Clerk, County Attorney, District Attorney Court, Sheriff, Constable and AG Local Office in Texas.

The Officials Directory tool can be found on the Tools tab.



4.6 Conflict Checker will check your entire TXdocs database (answers, appointments, bills, etc.) for a name to see if there may be a potential conflict of interest

Almost any time you enter a name in TXdocs, that name is saved to a database. The Conflict Checker searches those databases and then gives you a list of cases, appointments, phone slips, etc. where that name appears.

Some liability insurance companies will give a discount to firms who have a conflict checker along with policies to insure it's use.

TXdocsPli nt Assembly Practice Management Tools Clients & Cases Settings Utilities Learning Center Help ñ **H** ★ Officials Directory Other Attorneys Texas Codes Conflict Checker Deadline Calculator Create Worksheet Import Client Worksheet Training Video

This tool is only available in TXdocsPlus.

4.7 Create Worksheet is used to create a list of every question used in assembling selected forms

Some attorneys like to use printed worksheets to hand to a new client to help with gathering the information that will be needed for the new case. This feature gives you the ability to create a file that contains a complete list of all questions that will be asked when assembling the documents you select. You can then open the file in your word processor and edit it to create your worksheet.

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Texas Codes			Conflict Checker	Deadline Calculator	Create Worksheet	Import Clier Worksheet					

4.8 Deadline Calculator will calculate the due date for any deadline in the Tex. Rules of Civ. Procedure and Tex Civ. Practices and Remedies Code

Select the rule and enter the trigger date and the Deadline Calculator will tell you when the appropriate action is due. If the deadline falls on a weekend or courthouse holiday, TXdocs even adjusts the deadline accordingly.

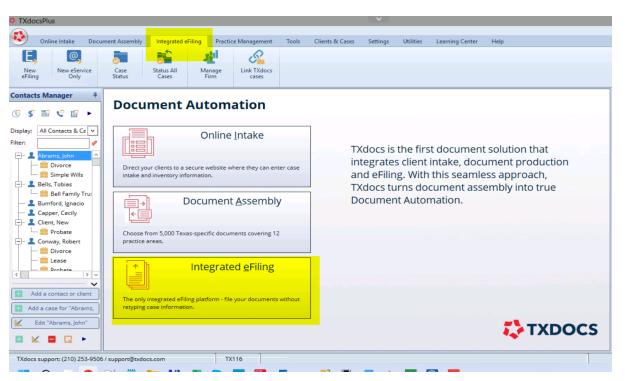
In TXdocsPlus, you can even have the calculator add the deadline to your Deadlines Manager.



5 eFiling

The integrated eFiling system is built right into TXdocs. This means you save time and effort because TXdocs is able to use your data for the client, case and assembled documents to reduce time, typing and errors.

You can access TXdocs eFiling from the main menu or from the large button on the Document Automation pane.



5.1 TXdocs' "Smart" eFiling system is learning every day as our users file documents. The smarter it gets, the more it helps to reduce errors and rejected filings.

TXdocs' artificial intelligence is designed to learn about the eFiling system's requirements and quirks that vary from county to county and document type to document type. This knowledge is being accumulated as documents are being filed. As TXdocs acquires more experience, it will be able to recognize what document your are filing in which county and then guide you through selecting the correct document type and case type. This will be particularly helpful when you are filing in a county you are not familiar with.

5.2 Automatic PDF conversion means you don't have to convert your docs to PDF before eFiling.

There is no need to convert your documents to PDF before efiling them. TXdocs does this for you automatically.

5.3 Merging documents into a single PDF is a snap in TXdocs

Most counties require documents to be separate PDF files but there are some who require all files to be merged into a single PDF. TXdocs eFiling provides a simple way to handling merging the documents. On the tab where you select the documents to eFile there is a link labeled "I'd like to merge multiple documents into 1". Click that link and you'll see a window where you select the documents to merge and then click Merge. It's that simple.

Note: Over time TXdocs Smart eFiling will learn which counties require documents to be merged and will handle it for you automatically.

🚦 eFile documer	nt(s) on behalf of Ka	rlee Klingensmith -	Divorce						-	- 🗆 >
D _{Case}	② Documents	③ Jurisdiction	(4) Case type	(5) Filer	6 Case partie	⑦ s Filing	8 Redaction	(9) eService	10 Fee	(1) Submit
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final decree of income withho		df	09/10/2024 04:5 09/10/2024 04:5 09/10/2024 04:5 09/13/2024 12:0	17PM	Remove lead		Select lead doc	ument.	+ Add	lead document
standing order			09/13/2024 12:0 08/28/2024 08:2		_	<u>I'd like t</u>	o merge multiple (documents into 1		
					Add attachment					
					Remove attachment					
					Add order Remove					
Select ot	ther document		Delete docum	ent	order 7 Training Video				_	Next

5.4 Tell TXdocs to automatically email courtesy copies of new eFilings

You can set TXdocs to send a courtesy copy of eFiling emails to a specific email address. This address will be pre-filled with the courtesy copy address to save you time.

On the Integrated eFiling tab, click the Manage Firm button. Then select Firm info.

TXdocsPlus - ACTIVE	CASE: John Abrams - Divorce						
🥙 Online Intake	Document Assembly Integrated eFiling	Practice Management	Tools Clients & Cases	Settings Utilities	Learning Center	Help	
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💄 Abrams, John	Attorneys						
Divorce	· · · · · · · · · · · · · · · · · · ·	Country:	United States	* ~			
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🖃 🚨 Conway, Robert	My Info						1000 C
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TXdocs support: (210) 253						Save changes	

5.5 Select your case to start eFiling so TXdocs can pre-load your case data and save time and typing

The major benefit of having eFiling integrated into TXdocs is that TXdocs will preload answers and other data from your case file into the eFiling windows. To do this, click the "Select case" button. If you are eFiling something for which you do not have a case in TXdocs, you can check "Skip selecting a TXdocs case".

📑 eFile docu	iment(s) on behalf o	f Robert Conway	- Divorce						- 🗆 X
① Case	② Documents	③ Jurisdiction	(4) Case type	(5) Filer	6 Case parties	⑦ Filing	8 eService) Fee	0 Submit
A	Select case ting a TXdocs case.	Robert Conway	- Divorce						

5.6 Easily select "other" documents for eFiling

The eFiling window where you select the document(s) for filing will always show all documents that are listed in your document manager (generally documents you have assembled). There are two ways to select other documents to file. Click the "Select other documents" button or drag/drop a file from your computer.

eFile docume	nt(s) on behalf of Ka	rlee Klingensmith -	Divorce							- □ >
D _{Case}	Documents	③ Jurisdiction	(4) Case type	(5) Filer	6 Case parties	7 Filing	8 Redaction	(9) eService	10 Fee	(1) Submit
'ou can drag	& drop documer	nts from your co	mputer directly	/ onto this wir	idow. Pick the doc	ument(s) and click	the select button.		Lead docu	ument(s) ?
Documents			Modified on		Select		Lead docume	nt #1		d document #1
final decree of final decree of			09/10/2024 04:		Server		Select lead docu	ment.	🛨 Add	lead document
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					Remove attachment					
					 Add order 					
M Select of	ther document		Delete docum	lent	Remove order					
Previ	ous				Training Video					<u>N</u> ext

5.7 Check the status of all eFile cases submitted to the court system

When you log into your existing eFile account, TXdocs downloads your eFiling & eService history, providing extended preservation of your filing history. View the status of current filings, view eServices, and easily resubmit any files rejected by the court.

TXdocs			v /		- Ø ×
Conline Intake Document Assembly	 Filing History Date Range From: 8/30/2024 	团 To: 9/13/2024 置	Apply Filter	– 🗆 X	💭 Read messages
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Filter:	Status Envelope#		Submitted On Filing Des	Rew Filing to this Case Rew eService to this Case	
	Submitted 275676 Accepted 275169 Canceled 275142 Accepted 274811	Jane Doe - Probate Tex Sample - Adoption	09/12/2024 13:29:40 Financial 09/04/2024 17:56:18 Application 09/04/2024 14:22:50 Final Decide 08/28/2024 16:00:51 Application		
Klingensmith, Karlee Sample, Susie Sample, Susie	Accepted 273 Accepted 2737 Accepted 273748 Accepted 273748		08/21/2024 16:51:45 Mineral D 08/15/2024 14:05:14 Appearan	💪 Link to TXdocs case 🛤 Fee Report	
🖻 – 🙎 Smart, Tex	Accepted 273742 Rejected 273479	filings at a		Case Information Costion: Refugio County - District Clerk Case Category: Emily - Marriage Relationship Case Type Divorce No Children (350.00)	
				Filing Attorney: Dries Attorney Payment Account: TXdocs Company Card Parties	
				Pertytype Name Email Petitioner Trust, Waxilium Respondent Trust, Sofia	
<				Filings Filing Status : Submitted Filing Code Description Reference Filing Type	
Add a Client				Petition Financial Inform eFile & Filing type Petition Financial Inform eFile & Gesnvice Description Security Financial Information Sheet Does not contain sensitive de	
	<		>		TXDOCS

5.8 Watch our eFiling videos to learn about the most sophisticated and easy to use eFiling system in Texas - and it's already in TXdocs

There are several eFiling training videos on TXdocs' website. Go to <u>www.txdocs.com</u> and select Training Videos/EFILING TUTORIALS.

https://www.txdocs.com/training-videos/informational-videos/

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	FULL TRAININGS		+		Have questions?				
	TXDOCS TUTORIALS		+		CALL US (210) 253-9506 Mon-Fri 8 am-5 pm CST				
	TXDOCSPLUS TUTORIALS		+						
	ONLINE INTAKE TUTORIAL		+						
	EFILING TUTORIALS		-						
	eFiling: Quick Start Introduction (5:20 minutes) eFiling: Full Tutorial with Tips and Tricks (18:32 minutes) eFiling: Registering and Managing Your Firm's eFiling Information and Users (6:47 minutes; eFiling: Case Status and Link TXdosc Cases (7:24 minutes) Electronic Signatures (6:49 minutes)								

6 Online Intake

Let your clients do the writing for you. Use online intake to securely exchange case intake information. Choose from a selection of questionnaires and inventories, even customize your own.

You can access TXdocs Online Intake from the main menu or from the large button on the Document Automation pane.

TXdocs - ACTIVE CASE: Susie Sample - Divorce			- a ×
Assemble Recently Practice Client Find a	Clients & Cases Setting: Ublitites Learning Center Help Create Quick Format Trideco Grade Wisard Trideco Editor		🗩 Read messages 🛛 🕞
Clenck Case Manager Draphyry All Clenck, Case & B-Prospects Farer Starter, Case Scale, Clenck Scale, Clenck Starter, Scale Starter, State Smark, State Smark, State Adapsion	Access thousands of Texas specific forms covering 12 practice Access thousands of Texas specific forms covering 12 practice Access thousands of Texas specific forms covering 12 practice Access thousands of Texas specific forms covering 12 practice Access thousands of Texas specific forms covering 12 practice Access thousands of Texas specific forms covering 12 practice Access thousands of Texas specific forms covering 12 practice Access thousands of Texas specific forms covering 12 practice Access thousands of Texas specific forms covering 12 practice Access thousands of Texas specific forms covering 12 practice Access thousands of Texas specific forms covering 12 practice Access thousands of Texas specific forms covering 12 practice Access thousands of Texas specific forms covering 12 practice Access thousands of Texas specific forms covering 12 practice Access thousands of Texas specific forms covering 12 practice Access thousands of Texas specific forms covering 12 practice Access thousands of Texas specific forms covering 12 practice Access thousands of Texas specific forms covering 12 practice Access thousands of Texas specific forms covering 12 practice Access thousands of Texas specific forms covering 12 practice Access thousands of Texas specific forms covering 12 practice Access thousands of Texas specific forms covering 12 practice Access thousands of Texas specific forms covering 12 practice Access thousands of Texas specific forms covering 12 practice Access thousands of Texas specific forms covering 12 practice Access thousands of Texas specific forms covering 12 practice Access thousands of Texas specific forms covering 12 practice Access thousands of Texas specific forms covering 12 practice Access thousands of Texas specific forms covering 12 practice Access thousands of Texas specific forms covering 12 practice Access thousands of Texas specific forms covering 12 practice Access thousands of Texas specific forms covering 12 practice Access thousands of Texas spe	The fastest and easiest way to quickly see what Tkdocs is about is to watch this video. It will save many hours of clicking around trying to learn Tkdocs on your own.	
Edit "Divorce"			txDOCS 🛟

6.1 Document Exchange

The Document Exchange portal provides a secure means of exchanging case information with your client.

egin a New Service	Client/case Client: Karlee Klingensmith		
anage Existing Services	Case: <u>Divorce</u> Client's email address: KarleeK@email.com	×	
ocument Exchange			
ustomize Your Site	Documents from your client	Documents for your client	
ustomize Help	Audit Report.pdf Uploaded: 09/25/2024	Original Petition for Divorce.doc Uploaded: 09/25/2024	
ustomize Questionnaires			
int Services Overview			
			110.000
	5		
	C Download	Add document for your client	
	Download	Add document for your client	

6.2 Customize Online Intake so it looks like your firm's website

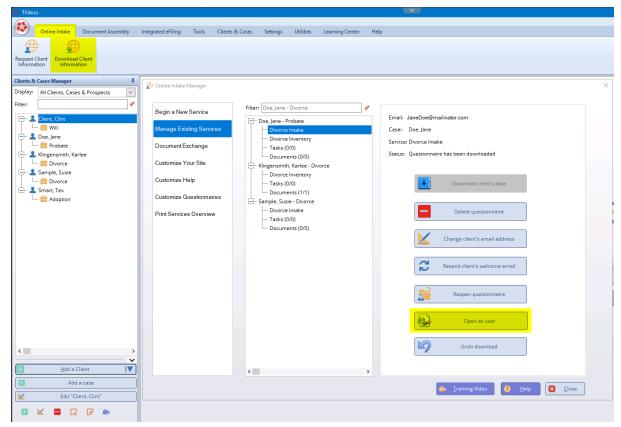
By default, the Online Intake site is very generic looking. You can customize this site to look similar to your firm's website by uploading your logo and a header file.

NOTE: For more detailed instructions on customizing Online Intake click the Help button.

🄯 TXdocs - ACTIVE CASE: Karlee Klingensmith - Divord	re V
Online Intake Document Assembly	Integrated eFiling Tools Clients & Cases Settings Utilities Learning Center Help
\oplus \oplus	
Request Client Information	Online Intake Manager X
Clients & Cases Manager 4	Begin a New Service
Display: All Clients, Cases & Prospects	
Filter:	Manage Existing Services
L Client, Clint	Document Exchange Click here to view your site
- Solution	Customize Your Site
Probate	Customize Help Logo:
E- L Klingensmith, Karlee	
	Customize Questionnaires Note: The max size of the logo image file is 60x60 pixels
Divorce	Print Services Overview Background color @ Use default O Other:
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+ Add a Client	📄 Iraining Video 🛛 👔 🖸 🔯
Add a case for "Klingensmith, Karlee"	
Edit "Divorce"	

6.3 Open Online Intake as your client to check your client's progress (or to preview your customization)

If you want to see how your client is progressing on entering the information you requested, you can open Online Intake and see exactly what your client sees and what has been entered. If you are customizing your site, this is also a good way to open Online Intake and see how your customization appears to your clients.



6.4 Sending questionnaires

There are questionnaires available for most practice areas, and you can customize your own. To preview any questionnaire, click its expand button \square . To send a questionnaire, select a case, confirm/add the client's email address, choose the questionnaires to send, personalize your message, then click Send. The email provides the links and instructions they need to get started.

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Information		
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Will	Document Exchange	Client's email address:
L Doe, Jane	Customize Your Site	
E & Klingensmith, Karlee		Choose practice area
🖵 🧱 Divorce	Customize Help	Practice area: Family Law (Longino)
E- Sample, Susie	Customize Questionnaires	Questionnaire(s)
- Divorce		🗋 Divorce Intake 🖉 🗋 Divorce Inventory 🖉 📄 Family Law - Initial Disclosures - Basic 🖉
- doption	Print Services Overview	🗌 Disclosures for Divorce or Annulment 👩 🗌 Disclosures - Suits Involving Support 🛛 🗍 Family Law Intake
	1	🗋 Financial Information Statement 🛛 📄 Child Custody Strategy Intake 🔄 📄 Family Law - Pretrial Disclosures 📝
		🗋 Family Law Adoption Intake 🛛 🗋 Adult Name Change Intake
		Email
		From: Ross Anderson
		Subject: FROM: Ross Anderson - Please provide information
		Salutation:
		(optional)
		v
		NOTE: The email we send will include a link to the TXdocs website as well as a user name and temporary password. In addition to
		the salutation, you can add a sentence or two that will appear at the beginning of the email to your client.
× · · · · · · · · · · · · · · · · · · ·		
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Edit "Client, Clint"		💼 Iraining Video 🥝 Help 🛛 💭

The questionnaires are mobile friendly, adding ease and convenience for your clients, and making the process more efficient and timely for you.

Online Intake	2						
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6.5 Set up a bcc so that you automatically receive copies of TXdocs' emails to your client

You can tell TXdocs to send a copy of every email it sends to your client. To do this, go to Settings/Firm Settings/Online Intake.

TXdocsPlus		
Online Intake Doc	ument Assembly Integrated eF	Filing Practice Management Tools Clients & Cases Settings Utilities Learning Center Help
Firm Settings	Firm Settings	Microsoft Word - Office 365 Pro Plus Show today's appointments Show tasks
Contacts Manager #	Payment Method Account Password	Online Intake
Display: All Contacts & Ce 🗸	Contacts and Cases	You can enter email addresses that you would like Bcc'd, for any email TXdocs generates for your clients using Online Intake. Please separate each email address using a ; (alan@txdocs.com;support@txdocs.com)
▲ Abrams, John 	Phone Slips Phone Slips	Emails to include in the Bcc:
Bumford, Ignacio Capper, Cecily Client, New George Probate	Case Note Shortcuts Calendar Shortcuts	
Conway, Robert	Phone App Phone App Users	-
Add a contact or client Add a case for "Abrams, Edit "Abrams, John"	 eFiling Setup eFiling Online Intake 	
	General	

7 TXdocsPlus has additional Practice Management Capabilities with many special features

TXdocsPlus is TXdocs with a lot of additional Practice Management features to help you run your office. There are major components such as Billing, Calendaring and Case Management and there are also many less known features that will also simplify your work.

TXdocsPlus Major Components

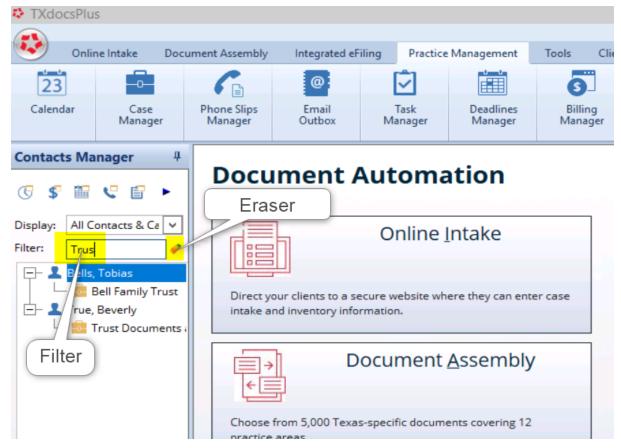
Case Manager Billing Manager Calendar Email Manager Phone Slips Deadlines Manager Task Manager

All of these features are available on the Practice Management tab.



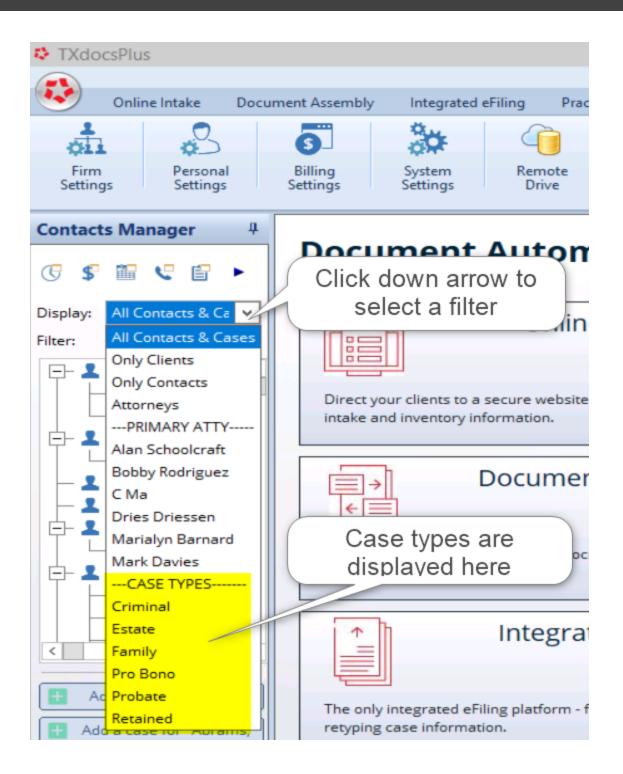
7.1 The Contacts Manager filter allows you to type a word or words and the Contact/Case list will instantly display the contacts and cases containing the word(s)

The Contacts Manager lists all open Clients and Cases. Use the filter to quickly narrow down the list. Type a search term and as you type the list will be filtered to only display those clients and cases that contain that word. Click the eraser button to instantly remove the filter.



7.2 Use "Case Types" to categorize and then display only cases of the selected type

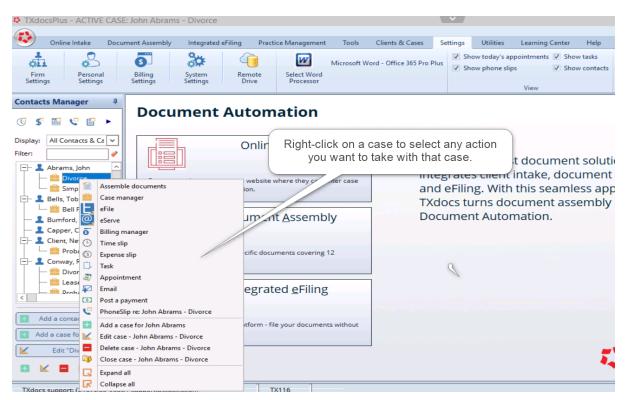
TXdocsPlus' Contact Manager lets you filter cases by "Case Type". To enable and customize this feature, go to Settings/Firm Settings/Contacts and Cases. After you set this up, the 'Display' drop list in Contacts Manager will let you select a Case Type to filter the list. Another benefit of categorizing your cases by type is the ability to include summaries per case type in some financial reports. The organized view allows for quick identification and comparison.



TXdocsPlus						~			
Online Intake	Document Assembly	Integrated eFiling Pr	actice Management	Tools	Clients & Cases	Settings	Utilities	Learning Center	Help
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Display: All Contacts i Filter:	Firm Information	Default	ck here if your firm a	assigns ID nu	imbers to clients	🗌 Include	: client numb	er in the Contacts M	lanager
Divorce	Payment Method Account Password	-							
Bumford, Igna	Contacts and Cases	Che	ck here if your firm a	-			e case numb	er in the Contacts M	lanager
- Divorce	Phone Slips Phone Slips	Crimi Estat	e		Add				
Add a contact or	Case Note Shortcuts Calendar Shortcuts	Famil Pro B Probi	lono		Delete				

7.3 Right-click on a client or case to see a pop up menu of all actions you can take with the selected item

Virtually every list in TXdocs contains a right click menu that gives you options for acting on the selected list item. In the Contacts manager, if you right click on an option you will see a different menu than when you right click on a case.



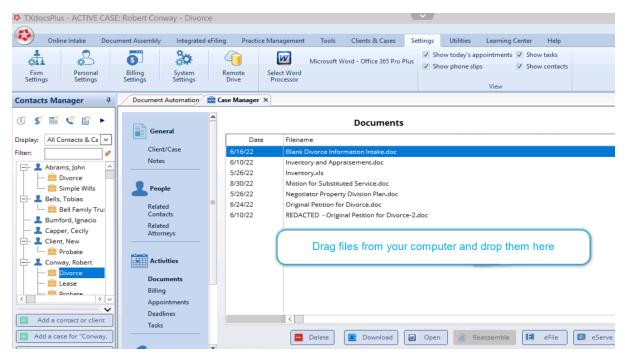
7.4 The active ("selected") case is always displayed on the title bar

The case that is currently selected in TXdocsPlus is always displayed on the top title bar.



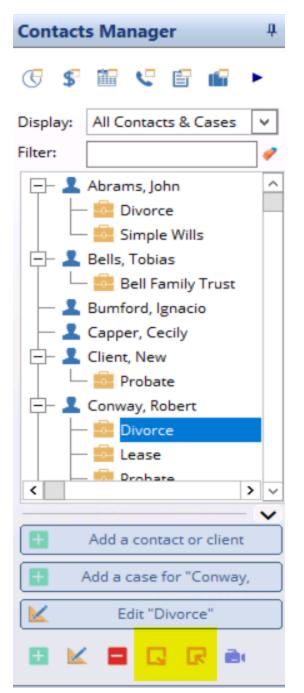
7.5 The Document Manager allows you to drag files from the file manager on your PC and drop them into the case folder

A great way to organize your case is by keeping all files together in the document manager. To copy files that were not assembled in TXdocs to the Document Manager, just drag them from your computer and drop them into the Document Manager.



7.6 Click the Expand/Collapse buttons to show and hide the cases in the Contacts Manager list

The Contacts Manager, like many other lists in TXdocs, has Expand 🔄 and Collapse 🖃 buttons. Click the Collapse button to hide the cases in the contacts manager and then click the Expand button to show the cases.



7.7 Tell TXdocs whether you want Contacts Manager to first appear Expanded or Collapsed

Some attorneys want TXdocs to initially only show Contacts and others want TXdocs to show both Contacts and Cases. In Personal Settings you can tell TXdocs how you cant this to display when TXdocs is opened.

TXdocsPlus has additional Practice Management Capabilities 45 ith

TXdocsPlus - ACTIVE CASE: Rol	oert Conway - Divorce			~		
Online Intake Document A	Assembly Integrated eFiling Pra	ctice Management Tools	Clients & Cases	Settings	Utilities Learning	g Center Help
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C S 🔛 😌 🗊 🖬 🕨	General					
Filter:	General	 Initially show Expansion 	Contacts/Cases list nded O Collap			
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8 Billing

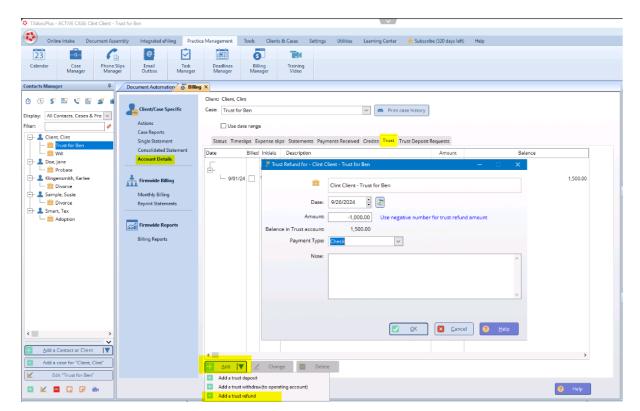
8.1 If your client sends one check for multiple cases, you can easily allocate that payment between multiple cases

Payments from your clients are handled through the Billing Manager. If you have a case highlighted (or a client who has only a single case) and click "Post a payment", TXdocs will be preset to post the payment to the selected case or to the only case available if you have selected a client. If a client sends one check to be applied to multiple cases, then select the client in Contacts Manager before you click "Post a payment". If you do that, then the payment window will allow you to select which of the client's cases as well as how much per case the payment is applied to.

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Online Intake Document				
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Display: All Contacts & Cases 🗸	Actions			Robert Conway
Filter:	Case Reports	🦆 р	ost a Trust a Payment recei	ved: 5,000.00 Applied: 5,000.00
🗆 🧰 Bell Family Trust 🗠	Single Statement		Payment recei	
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- Divorce	Monthly Billing	0	Add t	
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🚹 Add a case for "Conway,				
Edit "Conway, Robert"			in the second second	

8.2 You can easily refund the trust balance to your client

To refund some or all of a client's trust balance, click on the Trust tab in Account Details, then the Add button to select 'Add a trust refund'. Enter the amount you want to refund as a negative amount.



8.3 Undoing statements - if you want to modify a statement after it has been generated, you can "undo" the statement

After you generate a statement, if you realize you made a mistake, you can undo that statement as long as it is the last statement generated for that case. After you select the case, in Billing Manager, select the Statements tab under Account Details. Select the last statement shown in the list and then click 'Undo statement'.

Document Automation 🚰 Case	Manager X 0 Billing X Client: Conway, Robert
Client/Case Specific	Case: Divorce 💙 🚔 Print case history
Actions Case Reports	Use date range
Single Statement	Status Timeslips Expense slips Statements Payments Received Credits Trust Trust Deposit Requests
Consolidate Statement	Date Statement Number New charges Description
Account Details	- 10/31/2021 000655 2,502.93 Individual statement
	10/31/202 2,502.93 Divorce
📩 Firmwide Billing	E 12/31/2021 000656 195.00 Individual statement
	- 12/31/202 195.00 Divorce
Monthly Billing	02/28/2022 000657 697.50 Individual statement
Reprint Statements	02/28/202 697.50 Divorce
Firmwide Reports Billing Reports	
	Undo Statement 🤤 View/Print 🥥 Email Statement

8.4 Print a Court Exhibit report to prove up your fees and expenses

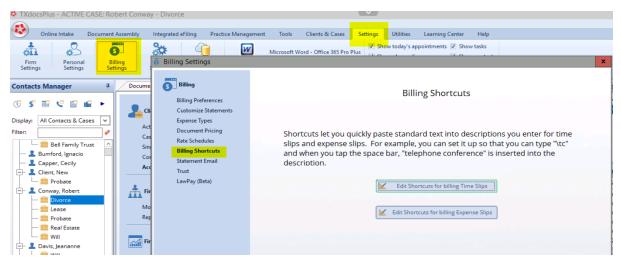
Use a Court Exhibit report when you need to proved up your fees and expenses. You can find this report in Billing Manager. Select a case and then select Case Reports.

\sim	s - ACTIVE CAS	E: Robert Con	way - Divorce								
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Calendar	Case Manager	Phone Slips Manager	Email Outbox	Task Manager	Deadlines Manager	Billing Manager	Training Video	9			
Contacts Ma	nager 4	Document	Automation 3	Billing ×							
Filter:	Divorce Simple Wills	Action Case Singl Cons	nt/Case Specific DS Reports e Statement olidate Statement unt Details				Robert Conway				
- L Bumf - L Capp - L Client	Bell Family Tru: ford, Ignacio er, Cecily	Mont	wide Billing hly Billing nt Statements				- Robert Conwa				
	Divorce 2	Firm	wide Reports								

8.5 Create your own shortcuts in billing (like '/TCC') to quickly enter common phrases like 'telephone conference with client'

There are common words and phrases that you will use very often when creating timeslips and expense slips. You can save time and reduce errors by creating a library of those words and phrases and assigning a few keystrokes a shortcuts for them. For example, you could create a shortcut so that when you type /TCC, "telephone conference with client" would be entered into a timeslip.

To create billing shortcuts go to Settings/Billing Settings/Billing Shortcuts.



8.6 When generating monthly statements, you can exclude (1) Inactive cases or (2) Inactive cases except with balance due or (3) Inactive cases except with balance due trust balance

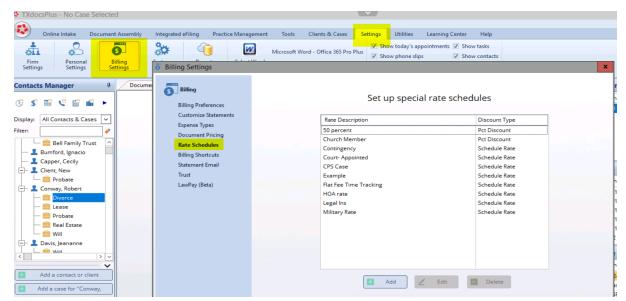
Some firms choose to mass generate monthly statements. You can choose to exclude certain accounts before generating the statements.

TXdocsPlus - ACTIVE CASE: Rol	bert Conway - Divorce			×		
Online Intake Document.				_		
Online Intake Document	Assembly Integrated eFiling Pra	ectice Management Tools	Clients & Cases	Settings Utilities	Learning Center Help	
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Contacts Manager 4	Document Automation 🛛 🚔 Case	Manager <mark>× 🗿 Billing ×</mark>				
Image: Second	Client/Case Specific Actions Case Reports Single Statement Consolidate Statement Account Details Firmwide Billing Monthly Billing Reprint Statements Firmwide Reports Billing Reports	Ger Due date: 9/08/2022 Bill To Date Primary Attorneys Only print for selected at Alan Schoolcraft Bobby Rodriguez C Ma Dries Driessen Marialyn Barnard Mark Davles	torneys	Exclude inactive case		

8.7 Use Rate Schedules to set up standard rates for different types of cases, for different situations or for different staff members

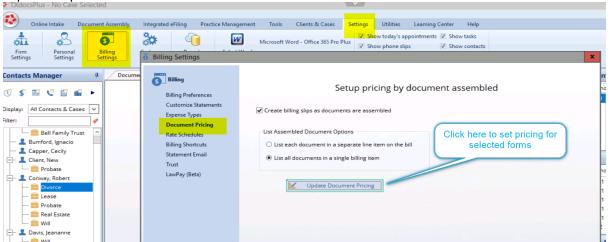
When adding or editing a case in Contacts Manager, you can assign a rate schedule to that case. A rate schedule will TXdocs to prefill the specified hourly rate or percentage discount to timeslips created for that case. Create and edit rate schedules in Settings/Billing Settings.

Case Will	Be Changed	x
Client:	Robert Conway	
Description:	Divorce	
Case type:	Family V	
		жó
Billing		
and the second second	lo not generate statements in monthy billing)	
	no case	
Automa	atically apply funds in trust to balance due on a statement	
Trust mini	imum balance: 2,500.00	
Trust reple	enishment level: 3,500.00	
Rate Sche	dule: Church Member 🗸	
Add Mo	onthly Fee	
	그는 것은 아이는 것은	
	☑ OK Cancel ? Help	



8.8 Document pricing can be used to have TXdocs automatically create a billing slip with a standard price for the selected document

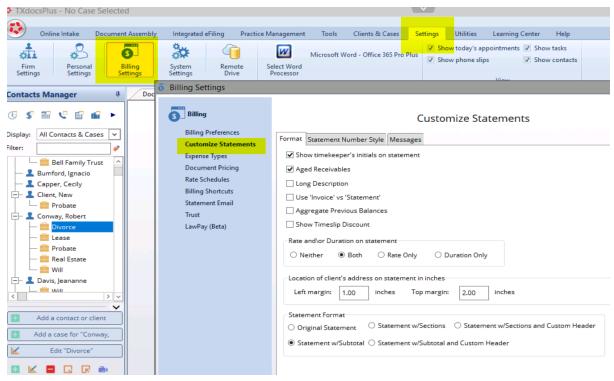
I guarantee, attorneys who wait until the case closes and then search through files to find items to bill overlook and fail to bill for a lot of their work. To reduce how often this happens, set TXdocs to automatically generate a billing slip every time you assemble a document or documents. If you can set prices for each document then that price will be pre-filled into the timeslip. You can also tell TXdocs whether to generate a single slip that includes all documents you just assembled or to generate separate slips for each document.



8.9 You can totally customize how your statements look. You can even create a custom header to include at the top of your statements.

There are dozens of settings you can use to customize how your billing statements look and what they contain. You can also select from several predefined statement styles. To customize statements, go to Settings/Billing Settings/Customize Statements.

Billing



8.10 Trust deposit request

When you want to request additional trust funds from your client, you can generate a printed or emailed request in TXdocs.

Trust Deposit Requests can be created in the Billing Manager/Account Details.

TXdocsPlus - ACTIVE CAS	E: John Abrams - Divorce				·		
Online Intake Doc	ument Assembly Integrated eFiling	Practice Management	Tools Clients	s & Cases Set	tings Utilities	Learning Center Help	
Calendar Case Manager 4	Phone Slips Manager Document Automation To Bill	Task Manager Manager	Billing Manager	Training Video			
Contacts Wanager C C C C C C C C C C C C C	Client/Case Specific Actions Case Reports Single Statement Consolidate Statement Account Details Firmwide Billing Monthly Billing Reprint Statements Firmwide Reports Billing Reports	Client: Abrams, John Case: Divorce Use date rang Status Timeslips Expe Date		nts Payments R Paid Initia	eceived Credits Tr	Print case history	

8.11 Statement numbers

You can tell TXdocs to generate and include statement numbers on your statements. You can also specify how you want the numbers to be formulated - numbers only, year +number, etc. Numbering is set in the same place you customize statements. Settings/Billing Settings/Customize Statements - Statement Number Style tab.

TXdocsPlus - No Case Selected	
Online Intake Document Assembly Integrated eFiling Practice Manag	ement Tools Clients & Cases Settings Utilities Learning Center Help
Firm Personal Settings Settings	Microsoft Word - Office 365 Pro Plus
Contacts Manager 4 Document	Customize Statements
Customize Statements	Format Statement Number Style Messages
Display Discument Pricing Filter: Document Pricing Rate Schedules Billing Shortcuts Bumford, Ignacio Statement Famili	Use Statement Number: Statement Number Format
→ ▲ Capper, Cecily → ▲ Client, New → ▲ Client, New → ▲ Client, New ↓ ▲ Probate	Number Only YYYY###### YYYYMM###### YYYYMMDD#######
Conway, Robert Divorce torce	Prepend Client number
- Sese - Sese - Sese - Sese Real Estate	Sample: 123456 Beginning Statement Number: 123
Davis, Jeanane	Beginning Statement Number: 123

8.12 You can tell TXdocs to track time in Minutes, Tenths of an hour or Hundredths of an hour in timeslips, statements and reports

You can select whether you would like time increments displayed like "30 minutes", ".5 hour", or ".50" hour. This selection is made in Billing Preferences.

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	Online Intake Document Asse	mbly Integrated eFiling	Practice Management	Tools Clients &	Cases Settings	Utilities Learning Center 🔶
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Conta	👼 Billing Settings					×
Ö Displa	3 Billing Billing Preferences		Bi	lling Preferenc	es	
Filter:	Customize Statements	Billing defaults				
	Expense Types Document Pricing	Statements are due 1	0 🛓 days after the stat	ement date - it can be	changed as you ge	nerate statements
_ -	Rate Schedules					
	Billing Shortcuts Statement Email					
	Trust	Consolidate statemer	nts if client has multiple ca	ses		
Ē	LawPay (Beta)	Add a fee to every ne	w statement			
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		Time Increments				
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	Edit "Anderson, Suzanne"					
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9 Calendar

9.1 You can drag/drop appointments on your calendar to change days or to change the duration

To quickly change the duration of an appointment on a calendar, drag the bottom edge of the appointment up or down. To quickly change the day or time of an appointment, click in the displayed appointment and drag it to the date and time you desire.

9.2 When you create an appointment you can have TXdocs email an invitaton for the appointment

When you are creating an appointment you can check a box to have TXdocs send an invitation to your client or to someone else. Click the link next to the checkbox to set up the email.

Appointm	ent Will Be Added	x
For:	Bobby Rodriguez 🗸 🔤 Private 🍇 Group	
Time:	Start: 9/15/2022	
Reminder:	TXdocs reminder 👻 15 🗘 Minutes 💙 🥏	
	Add a reminder	
Case:	(Click to select - Not Required)	
Subject:		
Note:	Outside event	
	Send invitation email <u>Click here to configure the invitation email.</u>	
	✔ Billable	
	Timeslip 🔽 <u>O</u> K Cancel ? <u>H</u> el	p

9.3 You can easily create default text for TXdocs to include in calendar invitations

When you add an appointment to your calendar, you can tell TXdocs to send an invitation (reminder/notice, etc.) to your client or some other person. In Personal Settings, you can store some text that you would like pre-filled into your calendar invitation.

TXdocsPlus - No Case Selected		~	
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Firm s Settings Settings Settings	Microsoft	Word - Office 365 Pro Plus	ointments 🗹 Show tasks 🔽 Show contacts
Contacts Manager # C General	Calendar	nvitations	
🕝 💲 🛗 📞 🖆 📾 🕨 Tim General	Send inv	itation when creating/modifying calendar appointr	ments
Display: All Contacts & Cases V	Default Invi	tation Text:	
Bell Family Trust			<u>^</u>
Capper, Cecily Client, New Description Calendar Calendar			
Calendar			V
- 💼 Probate 🛛 🛃 🖓 Workspar	ce r workspace		
E Avis, Jeananne	rworkspace		

9.4 Personalize your calendar by setting different colors for each staff member

If you have multiple people in your firm who use the calendar and if you use a group calendar to show everyone's appointments on the same calendar, it's helpful to specify a different color to use for each person.

While adding staff members to TXdocs, you can specify different colors to use for each member.

Staff Inform	ation Will Be Changed
Name:	Bobby Pages *
Initials:	BP \star (to sign on)
Office phone:	(210) 253-9506 Cell phone: (210) 253-9506 Fax: (210) 253-9506
Email:	training@txdocs.com
	Attorney Bar No.:
	Timekeeper - calendar & billing
	Hourly billing rate: 300.00
	Regular event color:
	Recurring event color:
	✓ Mobile app login allowed App Password:
	Use alternative email for reminders
	Use alternative phone for reminders
	✓ Include me in TXdocs' informational emails
	Click "Next" for more settings.
	1 out of 2
	Next Cancel ? Help

10 Timer

10.1 Quickly create a timeslip when using the timer

TXdocs' Timer feature pops up a small window that remains open and displays time elapsed. When you finish the task you are working on you can generate a timeslip with the time and case already pre-filled.

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Online Intake Docum	Click this timer button to start the timer.	
Contacts Manager 🛛 🖉	Document Automati Timekeeper: Bobby F	. <u>Group calendar</u>
Display: All Contacts & Cases v Filter: Filter: Filter	Day Week Mo O Work week O Full week 5 Monday 6 Stday 7 Wednesday 8 Thursday 7 Timer - X	k 4 ▶ September 5 - 11, 2022 9 Friday 10 Saturday 11 Sunday ^
Bumford, Ignacio Capper, Cecily Client, New Probate	0:03:29	Golfing Sep MoTu 29 30 5 6
Conway, Robert Divorce Lease	Robert Conway - Divorce	12 13 19 20 26 27 ≡
Probate Brobate B	10 The case for the generated tir the case selected in Contact briefcase to change to	meslip is pre-filled with ts Manager. Click the 3 4

11 General

11.1 Copy and Paste for Apple/Mac computers

You can copy and paste text in TXdocs using the standard Ctrl+C keys to copy selected text and Ctrl+V to paste the text. In TXdocs Anywhere, you can also use this functionality to copy text from your desktop into TXdocs.

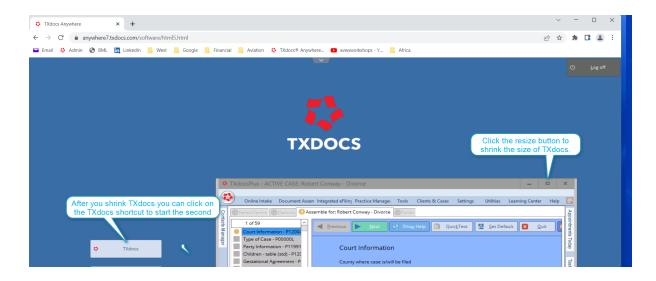
11.2 If your TXdocs Anywhere session gets disconnected you can reconnect within an hour and pickup where you left off

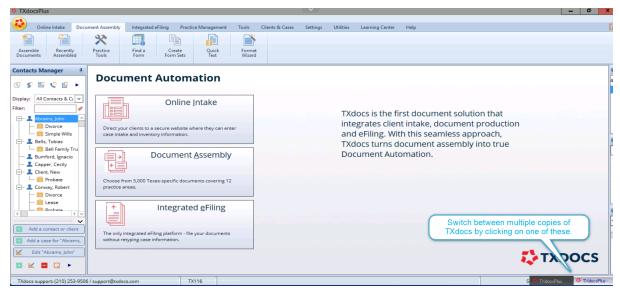
11.3 You can start multiple copies of TXdocs

If you are in the middle of an assembly session and you need to do something in TXdocs that you can't access while assembling documents, you can start a second copy of TXdocs.

To start a copy, click on the resize button in TXdocs to reduce its size. You can then see the TXdocs button that you use to start TXdocs. Just click it and open the second copy of TXdocs.

When there are multiple copies of TXdocs running, you can switch between them by clicking on the icons at the bottom of your screen.



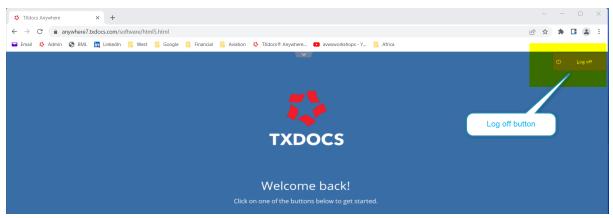


11.4 Always 'Exit' TXdocs to make the license usable by others in your firm

The number of licenses you have for your firm determines the number of people who can use TXdocs at the same time. If you have people in your office who share the use of TXdocs, it's important to free up the license you are using when you are finished with TXdocs. To close TXdocs and free up the license you are using, you must Log off.

To log off, first click the TXdocs logo in the upper left corner and select Exit. Then, on the large blue TXdocs welcome window, click on the Log off button in the top right corner.

TXdocsPlus			× /		
e Intake Document Assembly	Integrated eFiling Practice Management	Tools Clie	ents & Cases Settings	Utilities Learning C	enter Help
Exit 22					
Assemble Recently Click this	s logo then click Exit	Format Wizard			



12 Getting Help

Whenever you need assistance from our Texas friendly support team, we're here and ready to help.

12.1 Our phone number and email address is always visible in TXdocs

The phone number and email address for TXdocs support are always visible on the bottom left corner of TXdocs. Please do not hesitate to contact us when you need help.

Cirein, ivew Bernew Probate Conway, Robert Bernew Divorce	Choose from 5,000 Texas-specific documents covering 12 practice areas.	
C Drobate	Integrated <u>e</u> Filing	
Add a contact or client Add a case for "Abrams, Edit "Abrams, John"	The only integrated eFiling platform - file your documents without retyping case information.	
Colic Advisition, joint	TX116	TXDOCS

12.2 Use the "Contact us" form to request new forms or changes to existing forms or to just give general feedback

We want to hear from you! If you don't want to call or it's outside of business hours, use the Contact us form to let us know what we can do better. If you have forms you would like to see added or changed, let us know. We try very hard to take your suggestions and implement them in TXdocs.

The Contact Us button can be found on the Help tab.

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•	2			•							
Getting Started	g Help d	Concierge Help Request	Contact Us	About							

12.3 TXdocs Concierge is handy for requesting training

TXdocs provides unlimited on-on-one remote training. If you don't want to call or it's outside of business hours, use the Concierge form to ask for scheduled training.

The Concierge button can be found on the Help tab.

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*	8										
Gettin Starte	ig Help d	Concierge Help Request	Contact About Us								

12.4 The TXdocs Facebook user forum is where users meet to exchange ideas and information

Join the 'TXdocs User Forum' on Facebook, to share your experience and gain insights from other subscribers.

12.5 There is an extensive library of videos to help you learn everything there is to know about TXdocs

There are dozens of short training videos available in TXdocs. The topics range from getting started through advanced features.

Access a menu of these videos by going to the Learning Center tab and clicking Training videos.

