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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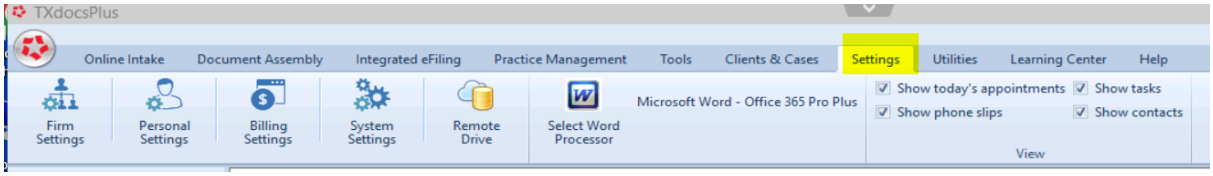
1 Menu/Set up Options

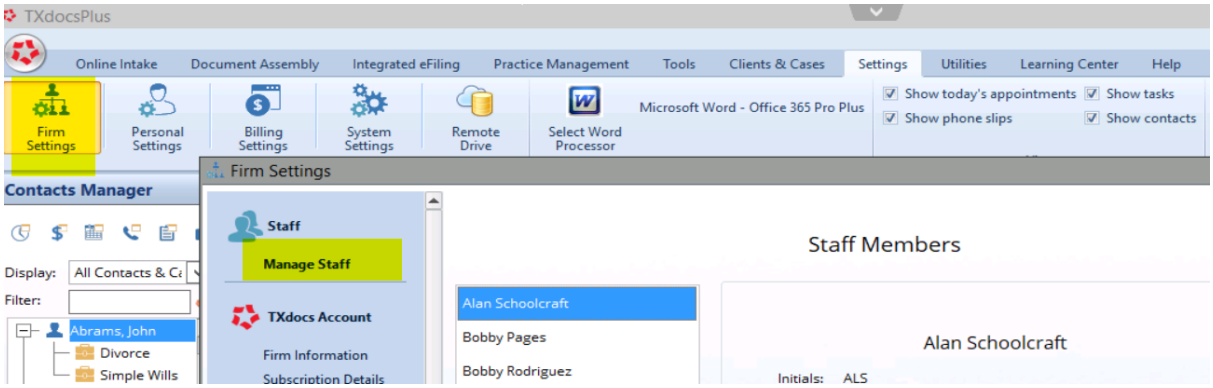
The TXdocs Main Menu uses tabs to group related features together. To customize TXdocs go to the Settings tab.



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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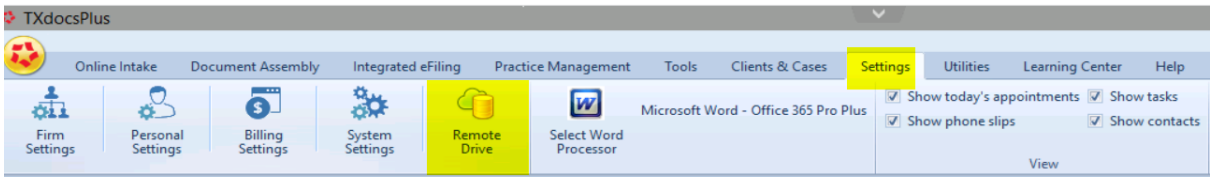
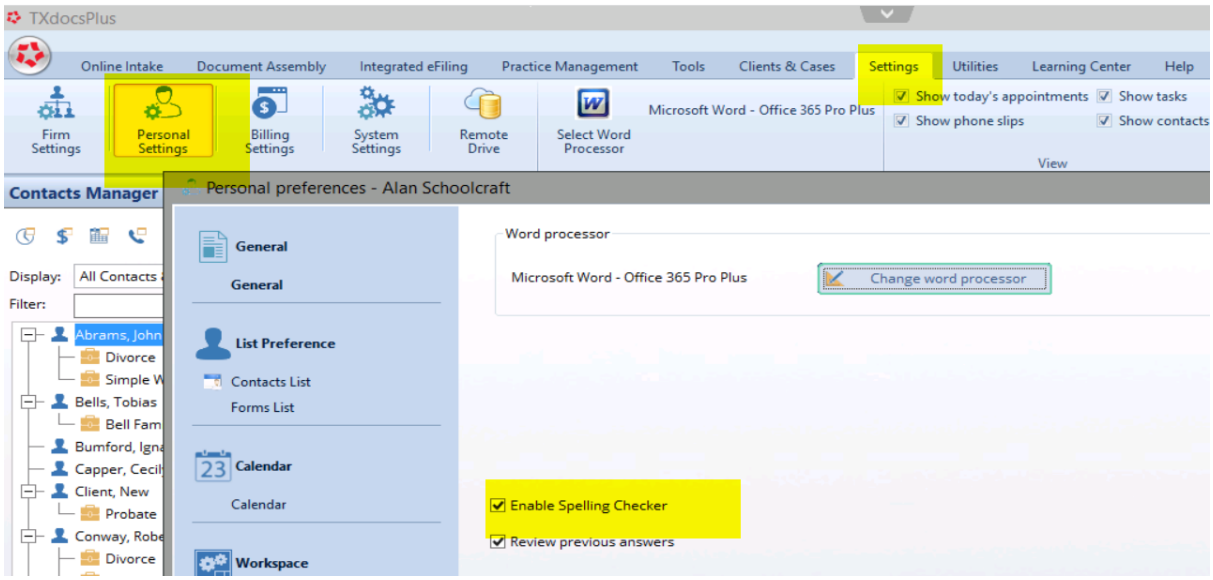


1.3 Spell checker - let TXdocs check your spelling

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.



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.

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.

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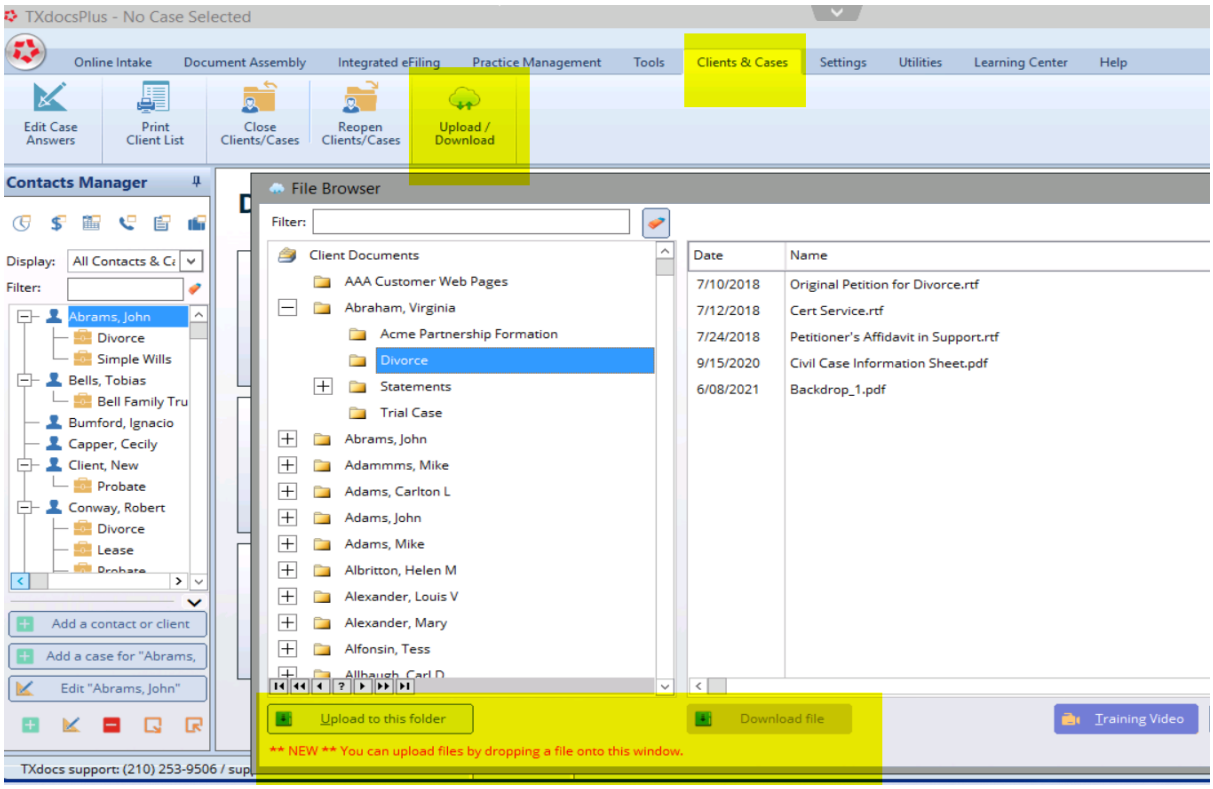
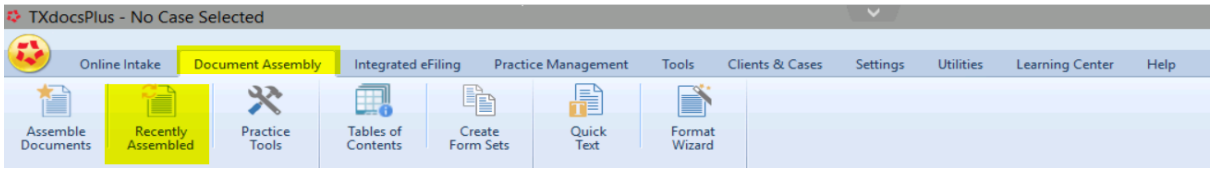
Simply select a case and you will see a list of all files in that cases' folder. Use the Upload to this folder button to add files from your PC or the Download file button to download files to your PC.

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



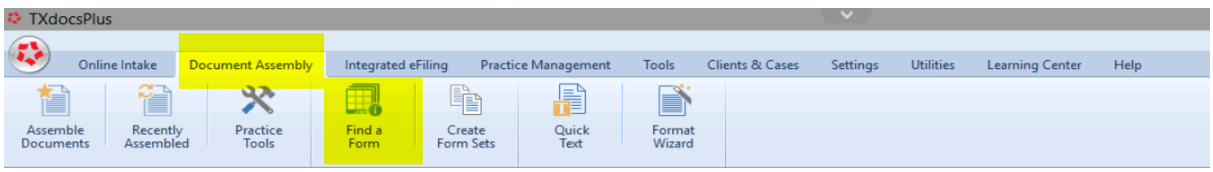
1.6 Recently Assembled - quickly find documents you assembled recently

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.



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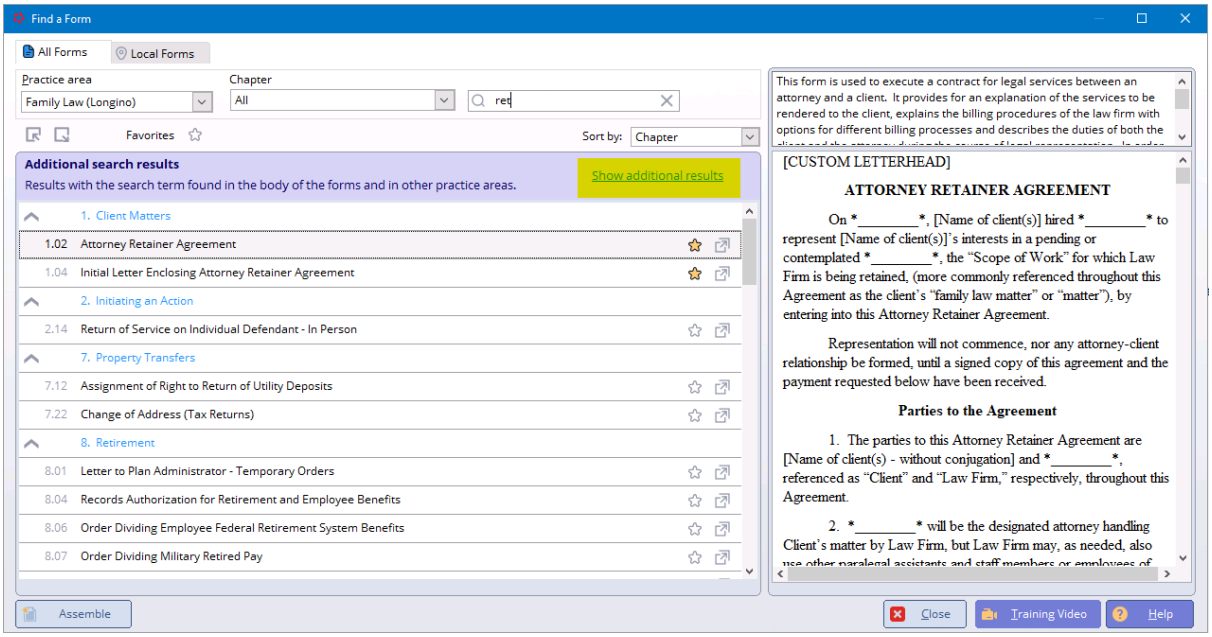
When you type a search term, TXdocs first scans the practice area selected for the best results. The titles and bodies of forms in all practice areas are also scanned for possible matches. If the initial results don't have what you're looking for, click 'Show additional results' to view other options.



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.

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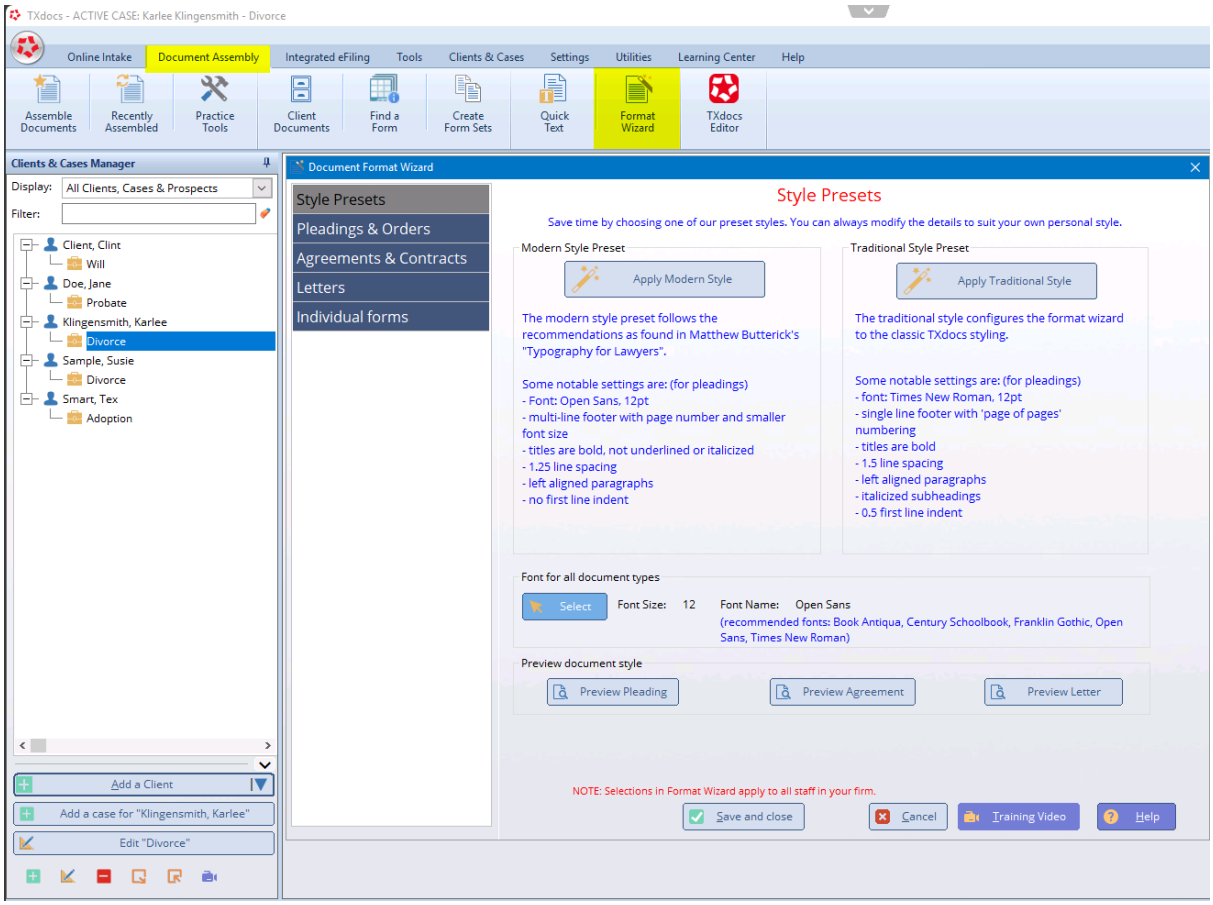

2 Assembling Documents

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.

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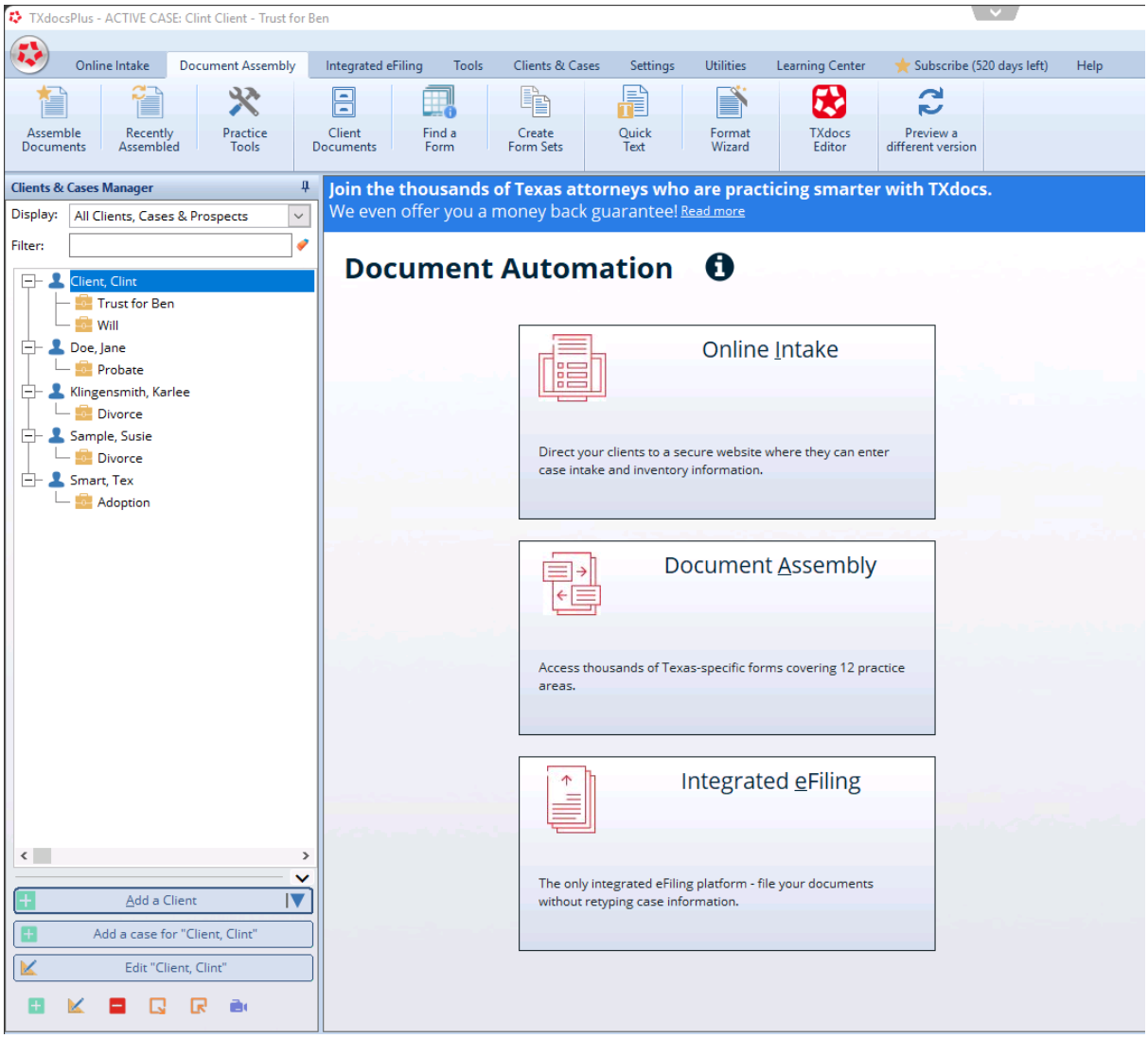

2.3 Reassemble Button - quickly select a previously assembled form to reassemble

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 .

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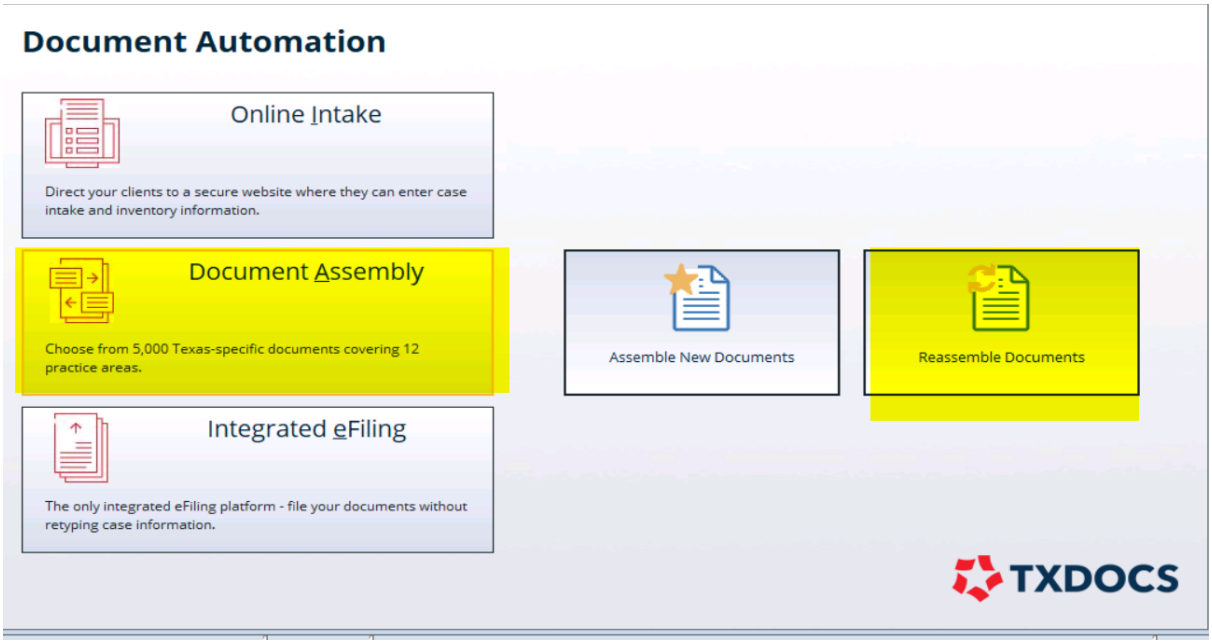

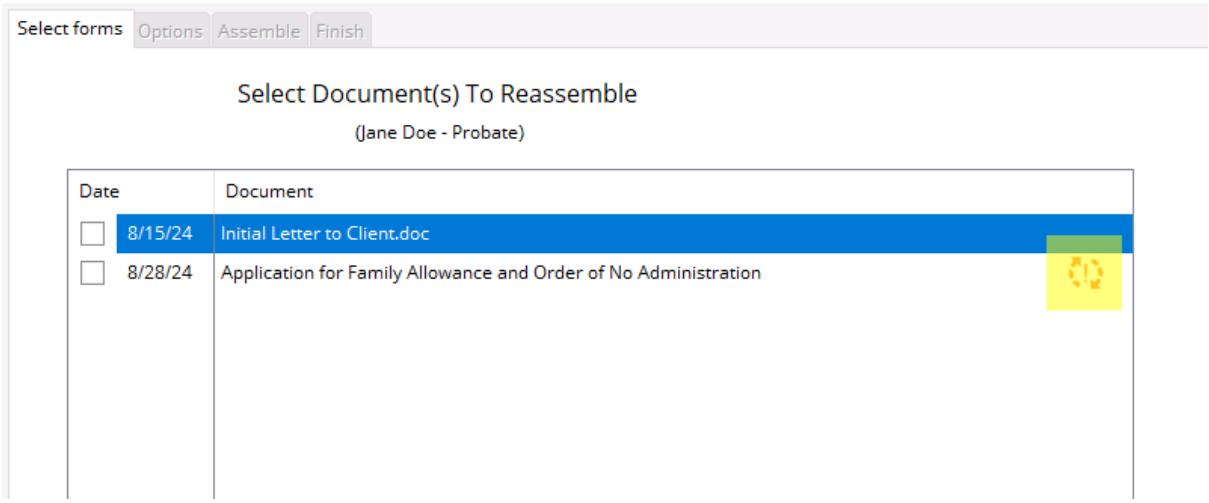

2.4 Creating one-off documents.

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).

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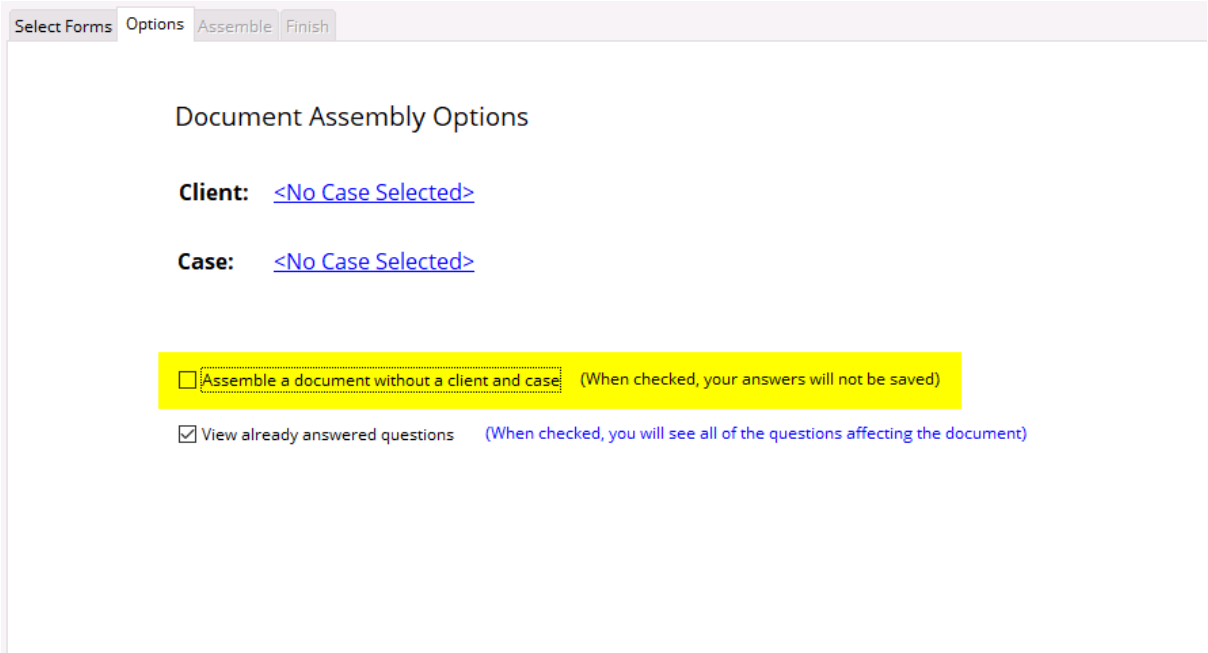


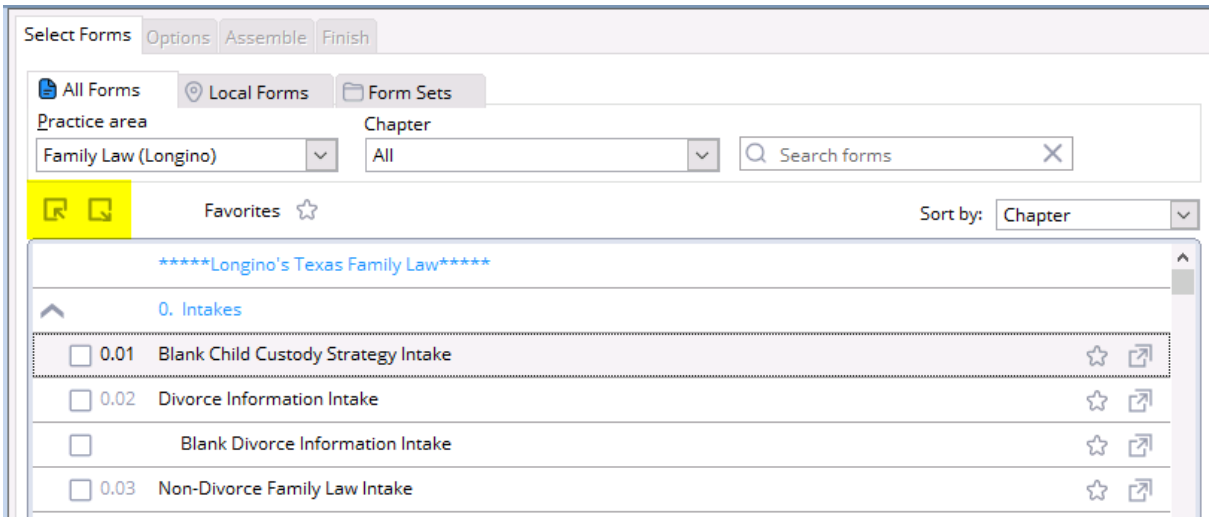
2.5 Expand/Contract Buttons - hide/unhide the forms underneath each chapter heading

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 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 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.)



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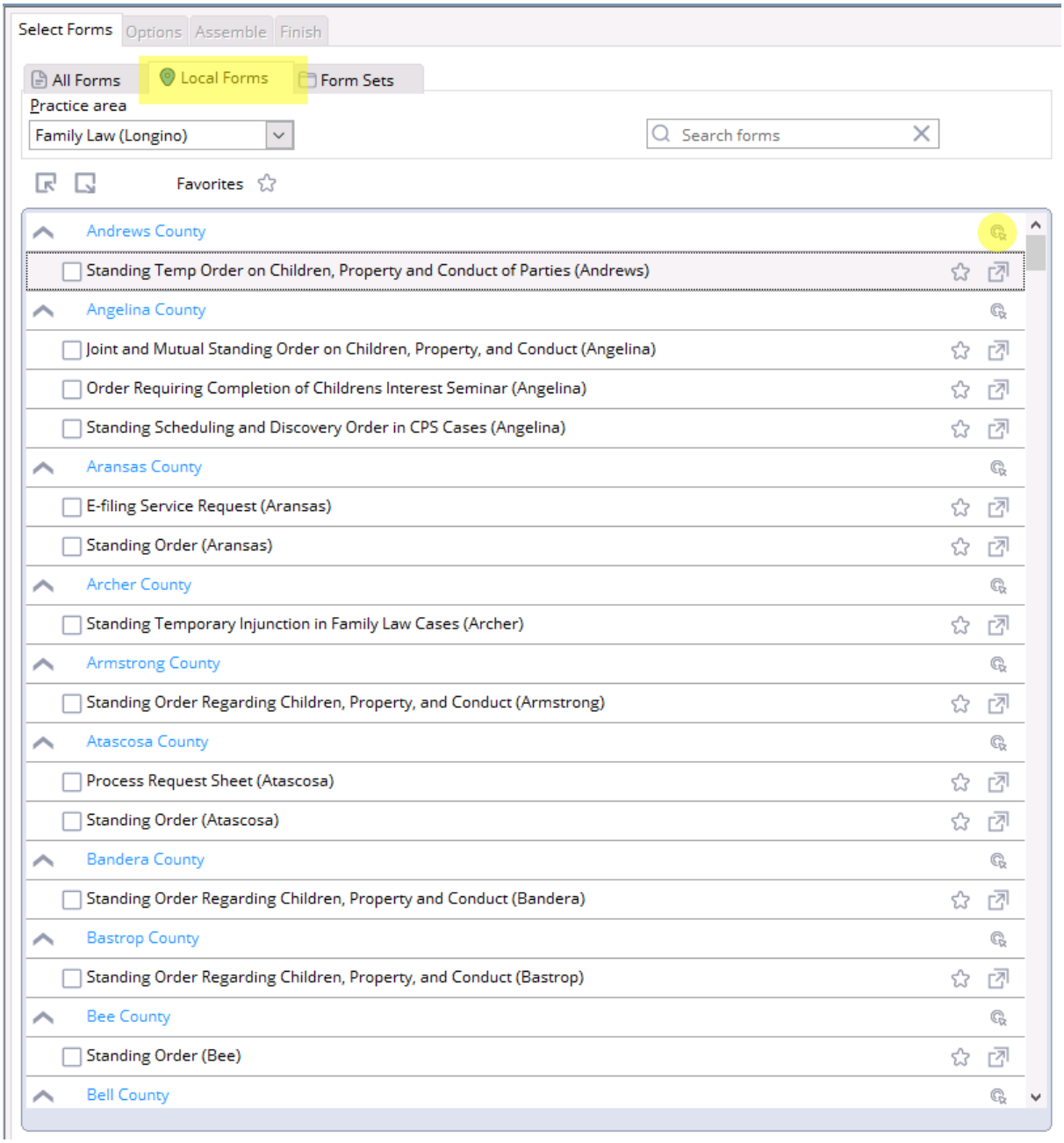
2.6 Local Forms - this tab lets you select from hundreds of county local forms

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 icon at right. The default county will display at the top of the list.



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

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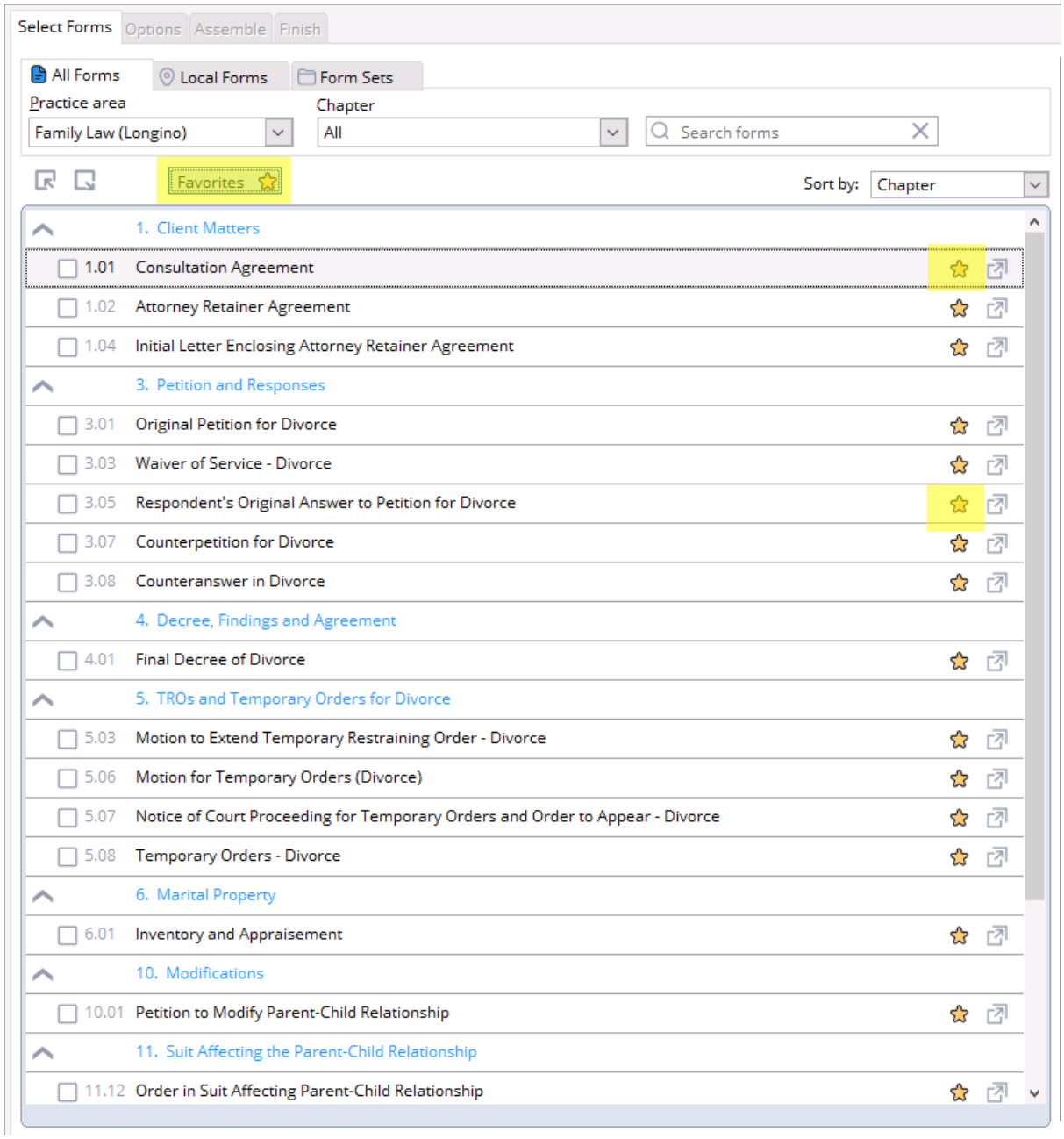
Personal Settings. You can also manually add and remove forms in this list by double clicking the star to the right of the form's title.



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.

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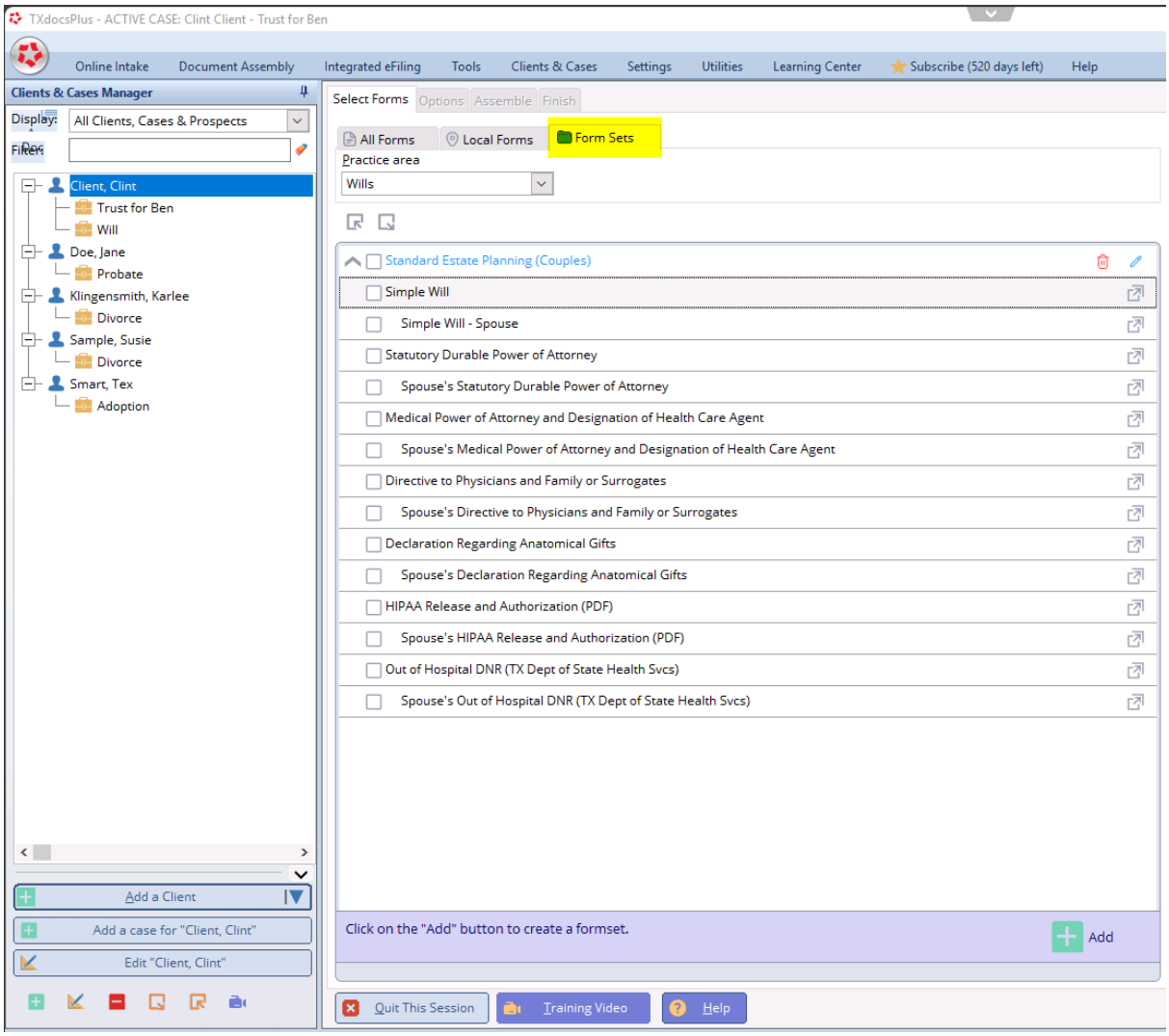
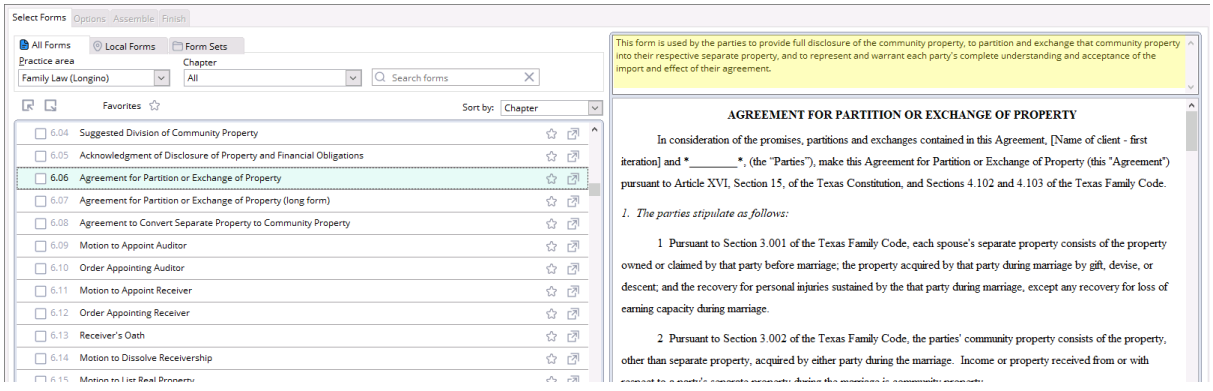


2.9 Form Help - see a summary description of your highlighted form

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.



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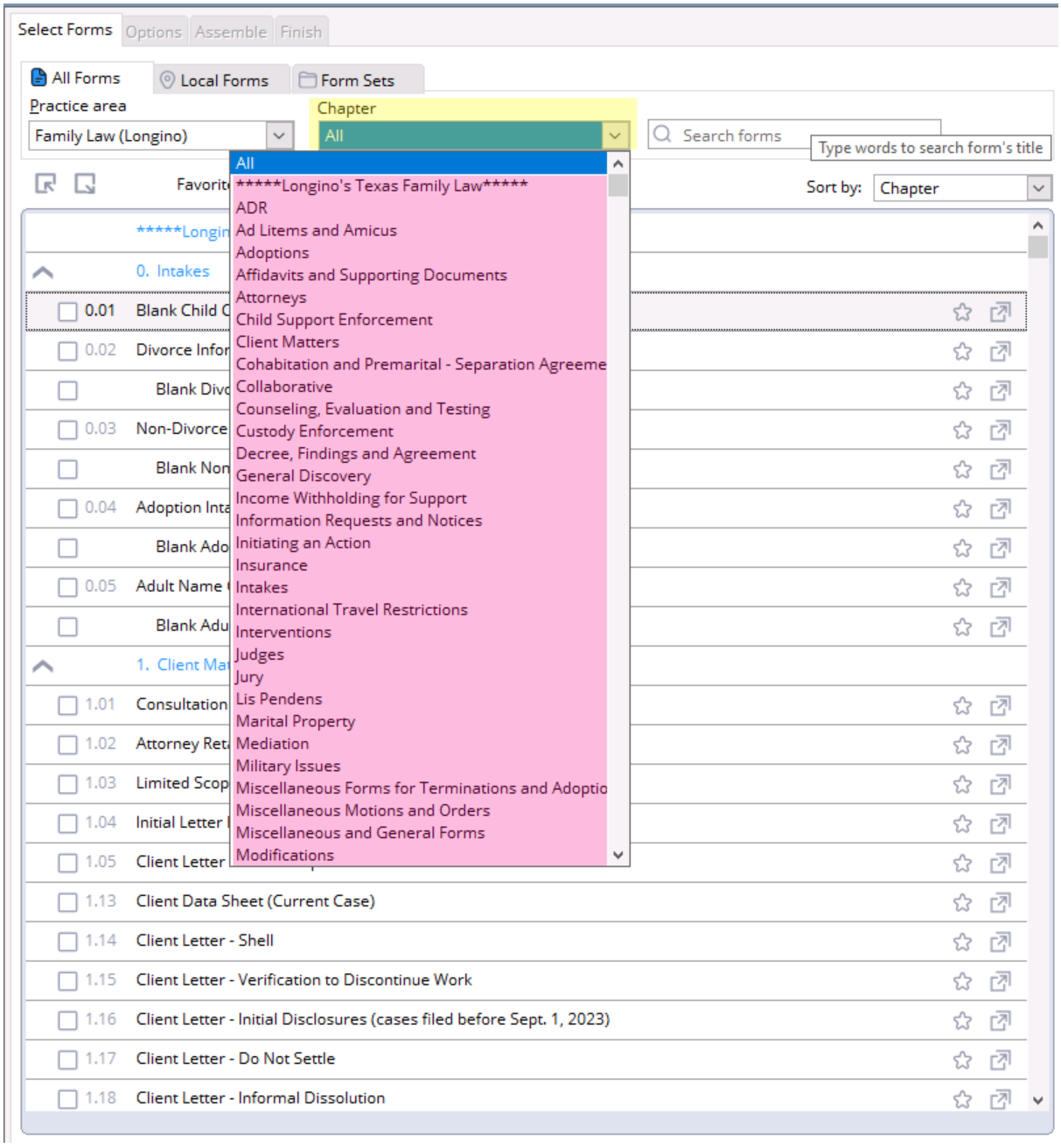
2.10 Chapters droplist - show only the forms for a selected chapter

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



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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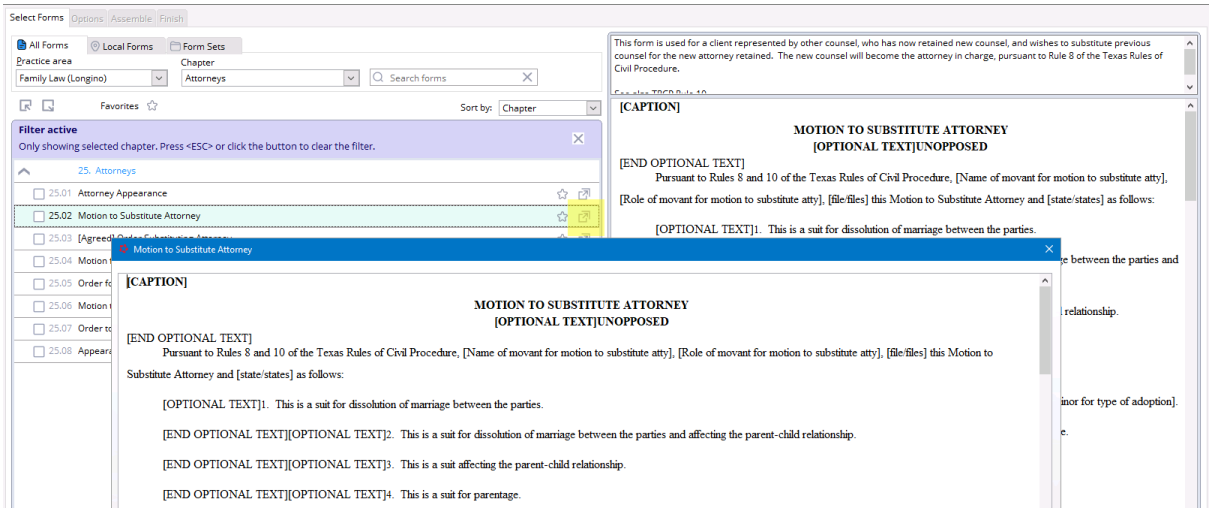
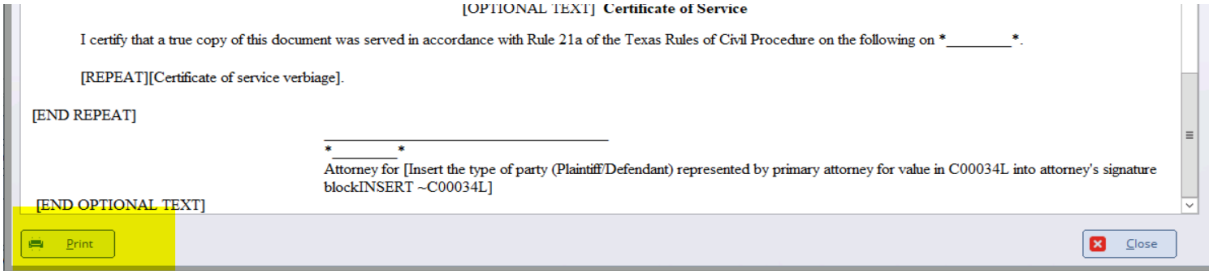


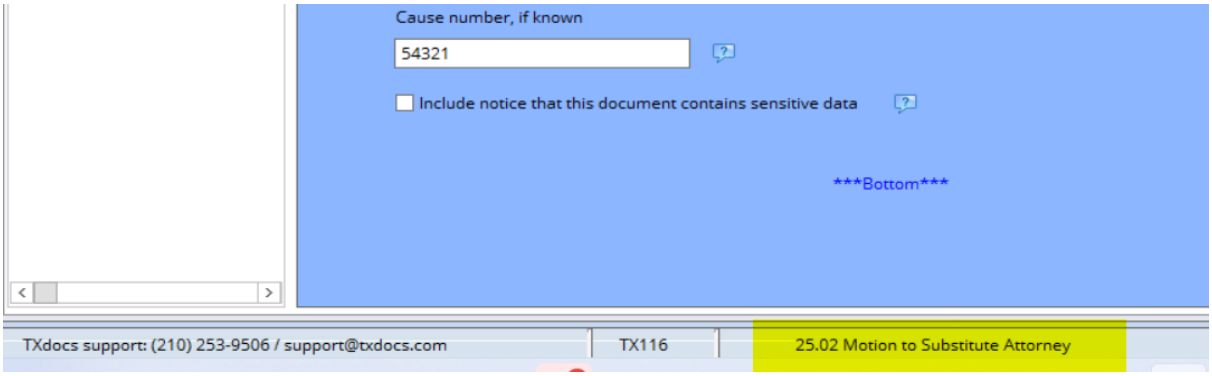
2.12 Print a blank form template from the Preview window

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. (*with subscription)



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.



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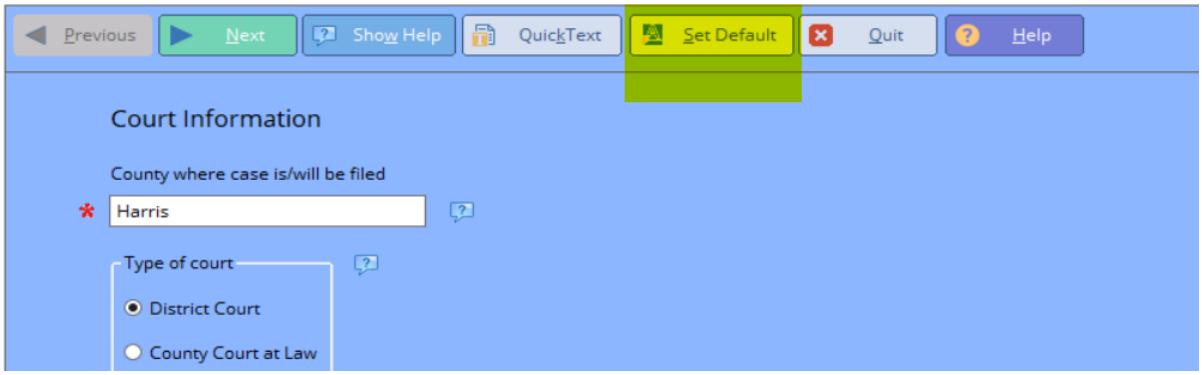
2.14 Save lots of time by setting default answers

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.



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.

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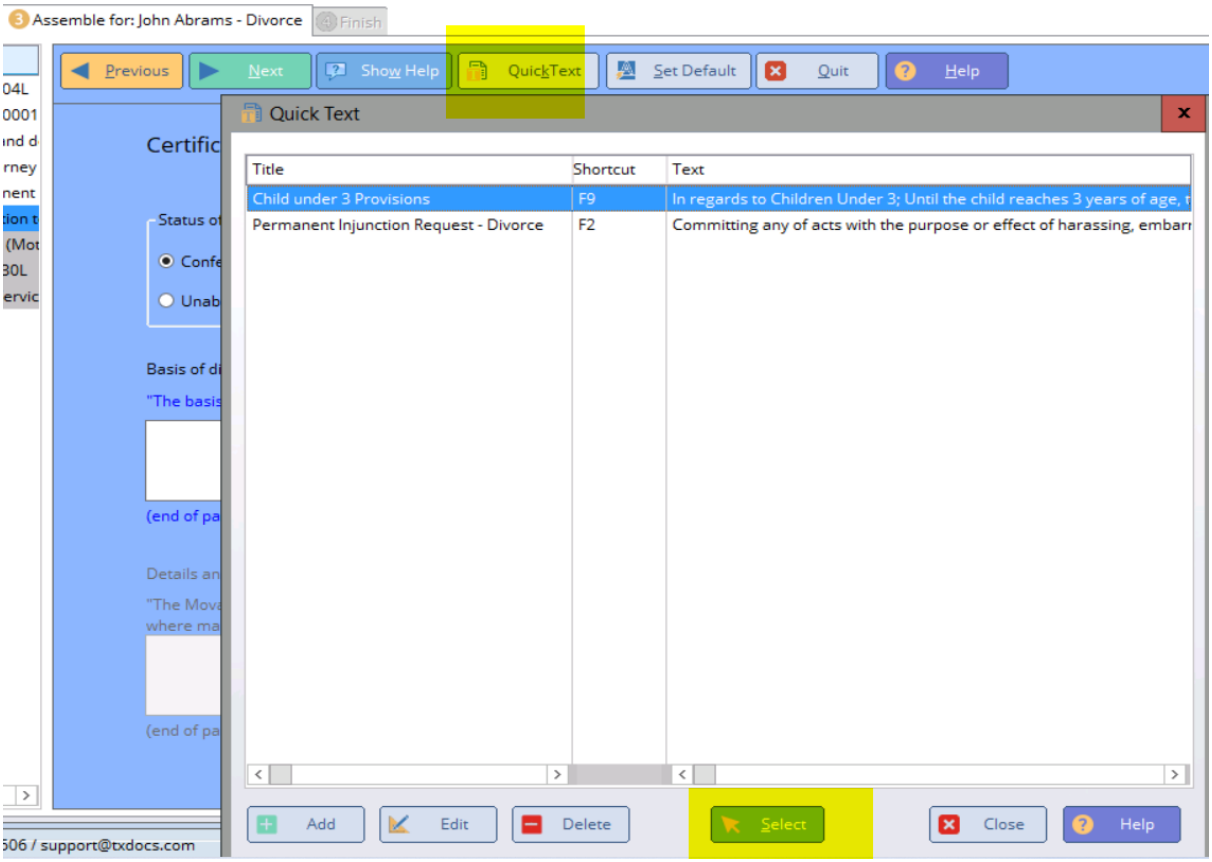

2.16 Copy a case to save time when creating a similar case

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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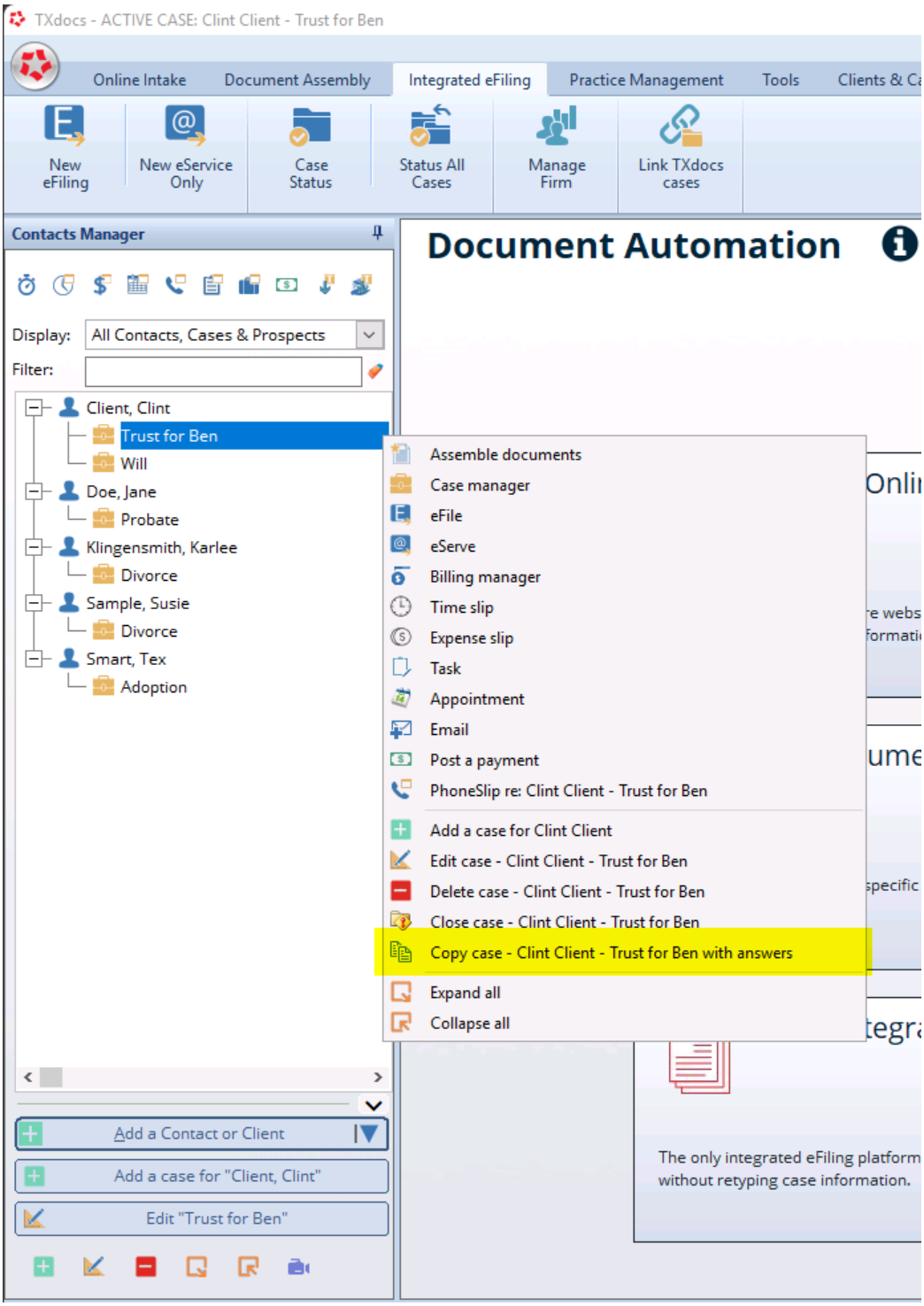

2.17 Hot Keys - save time by using hotkeys instead of always clicking buttons

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.

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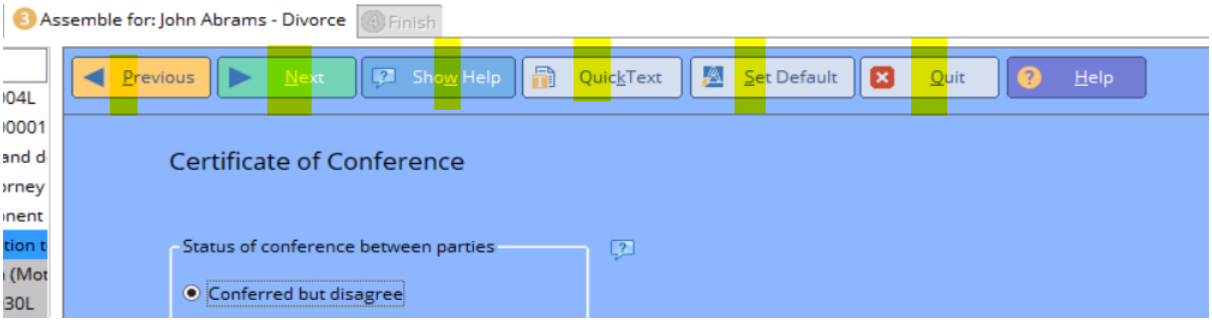
For example, when assembling documents, you can press Alt+N or Page Down to go to the next screen and Alt+P or Page Up to return to the previous screen.

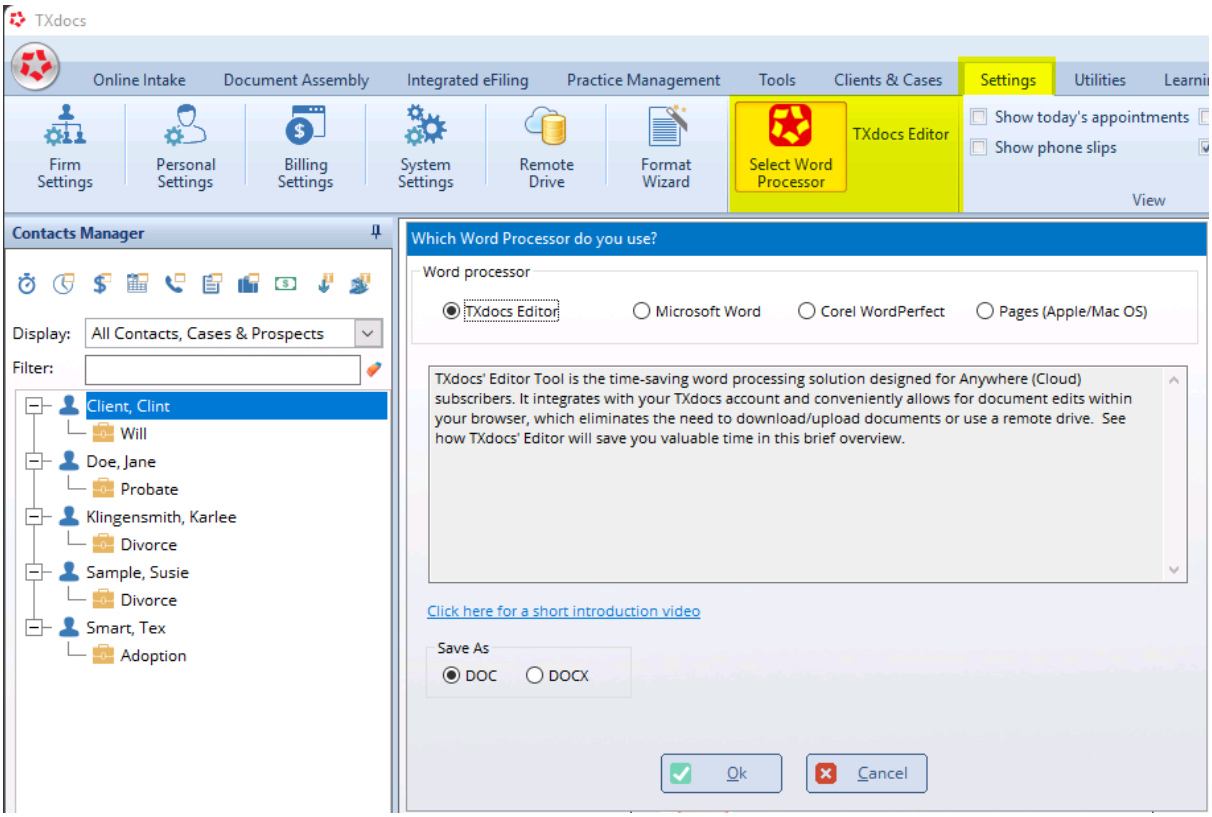


3 TXdocs Editor

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'.



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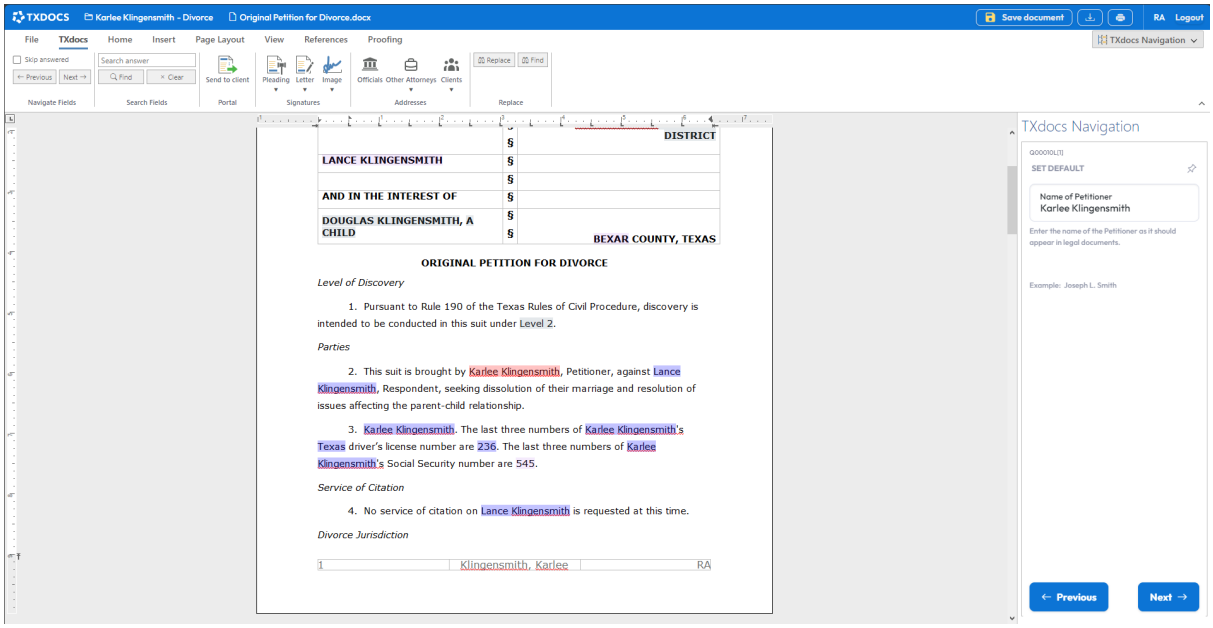
3.2 Easily review case answers, make addtions & edits, and create new documents from scratch.

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.



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

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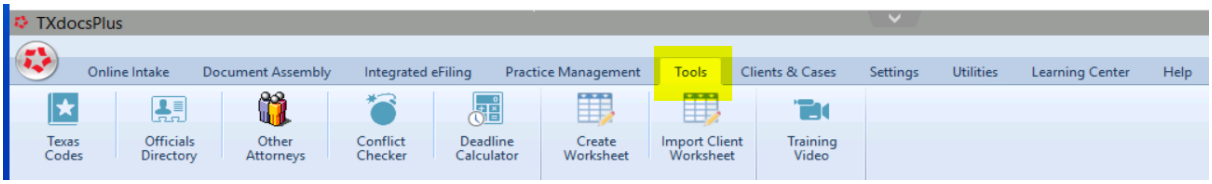
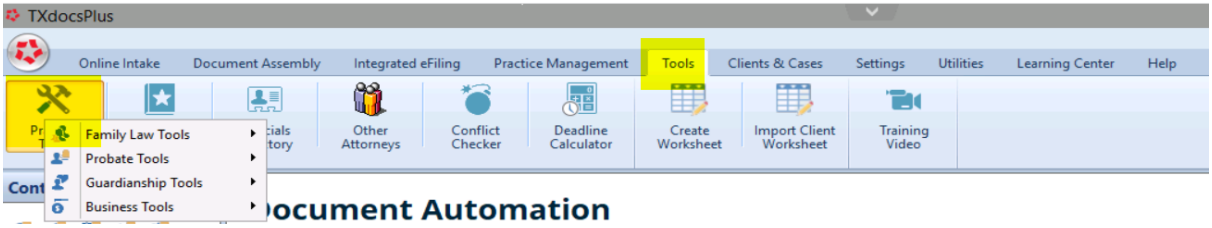


4.1 If you just want to enter/edit data and you don't need to assemble a document, it's much easier to just open tools such as the Family Law Inventory, Proposed Division, or Heirship Tree from the menu rather than going through the document assembly process.

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.



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.

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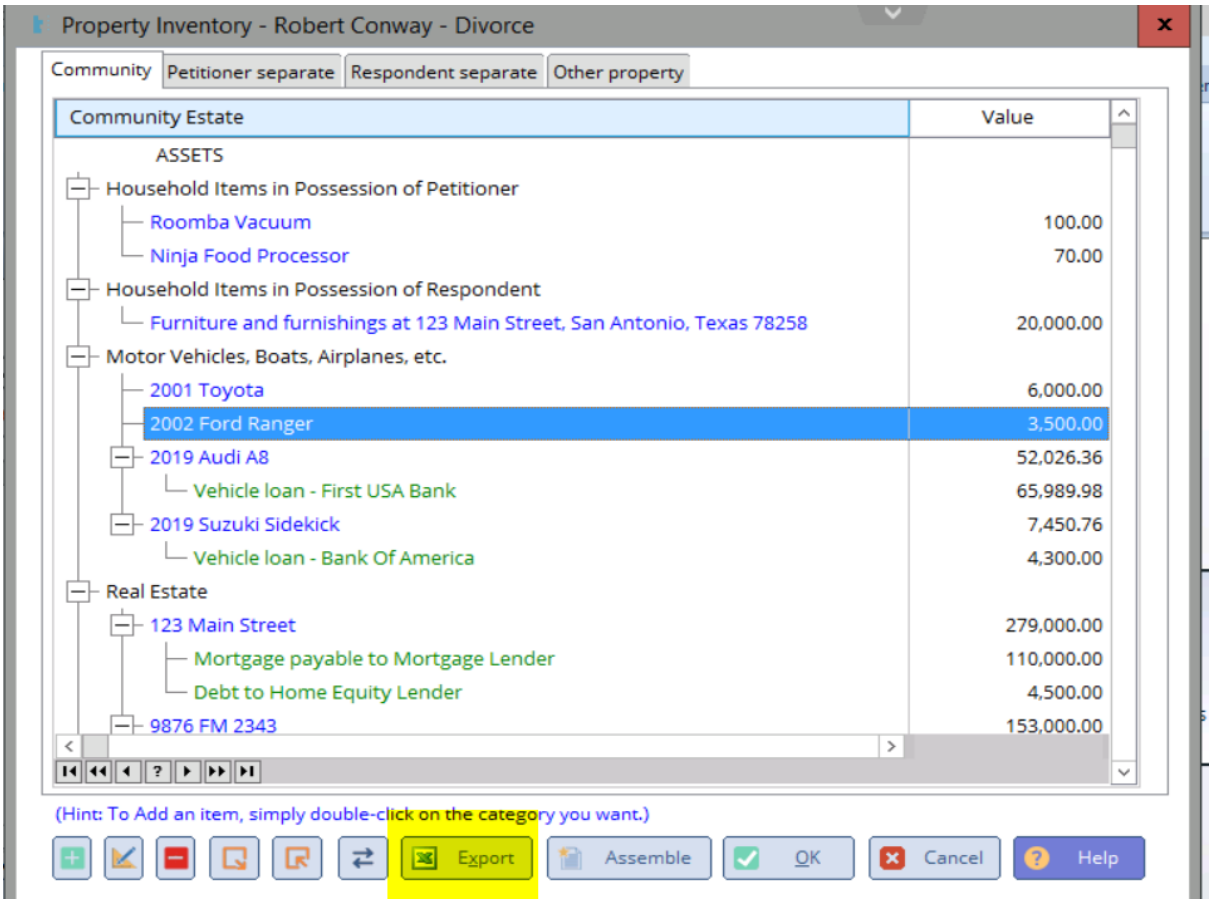
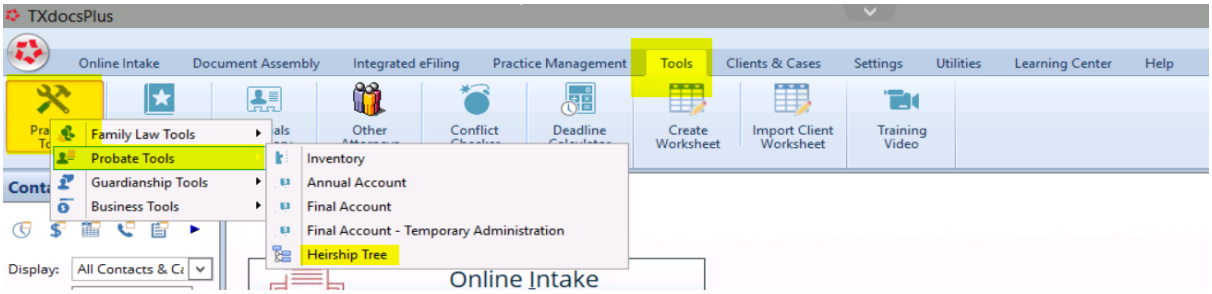


4.3 Probate Heirship Tree lets you print or create a PDF file of the decedent's family tree

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.



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.

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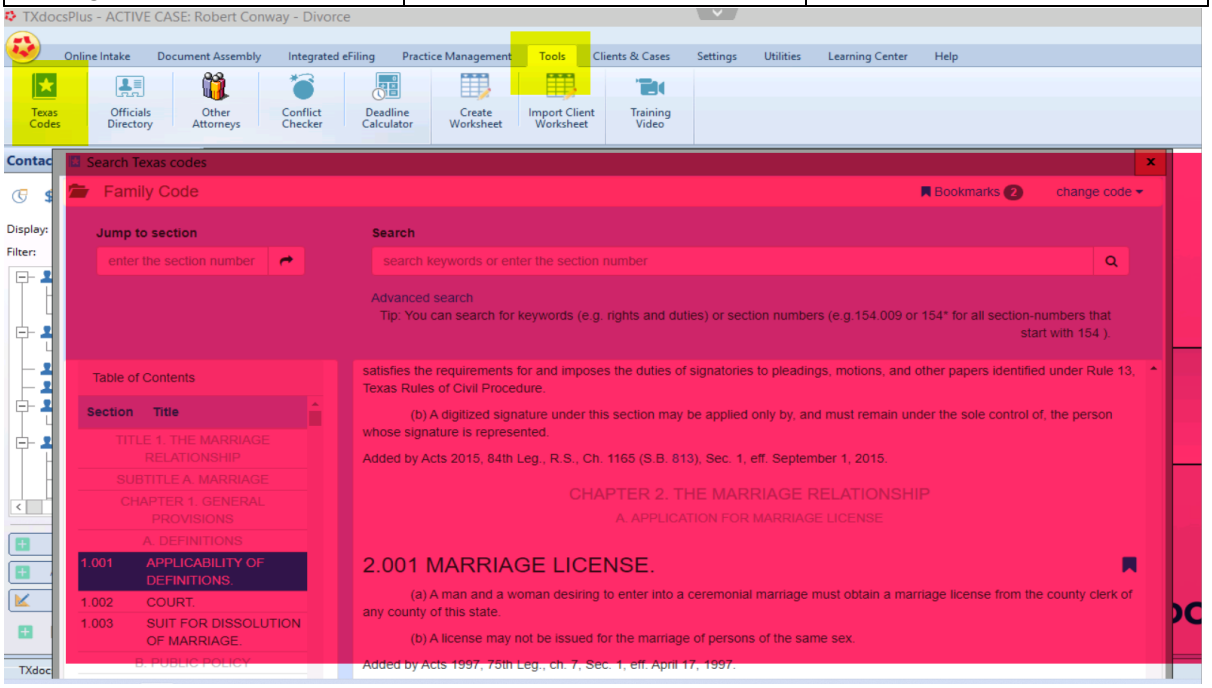
The Texas Codes button can be found on the Tools tab.

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		



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.

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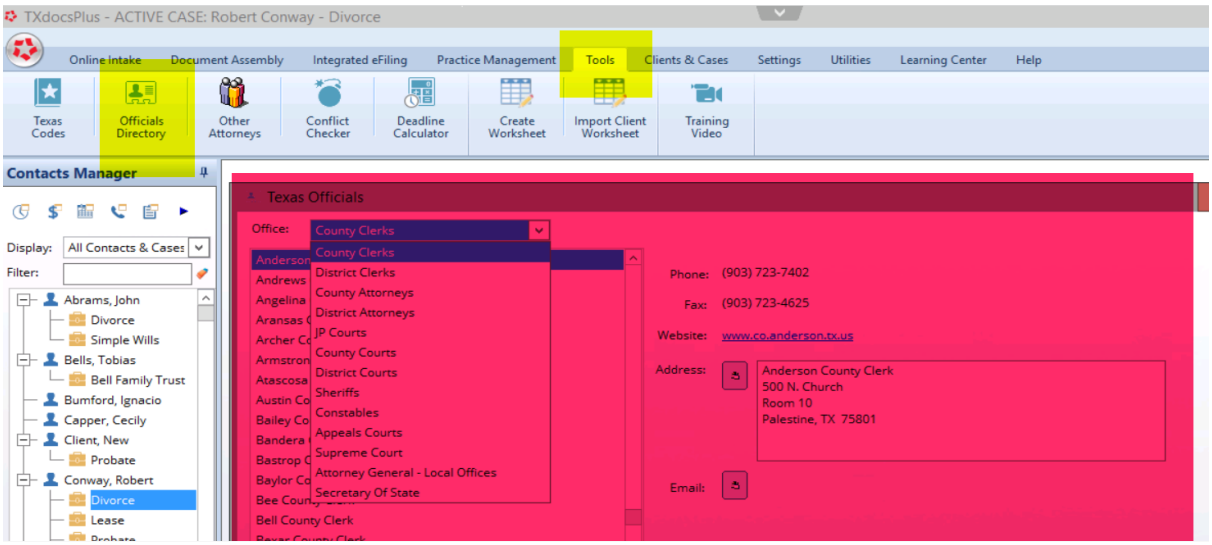
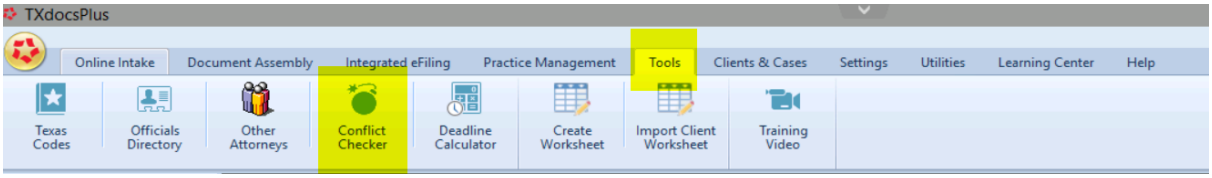


4.6 Conflict Checker will check your entire TXdocs database (answers, appointments, bills, etc.) for a name to see if there may be a potential conflict of interest

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.

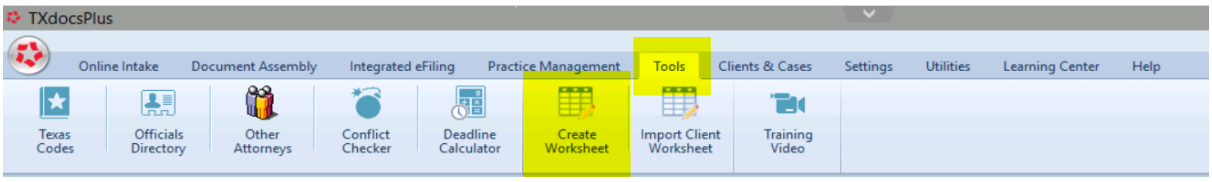
Some liability insurance companies will give a discount to firms who have a conflict checker along with policies to insure it's use.

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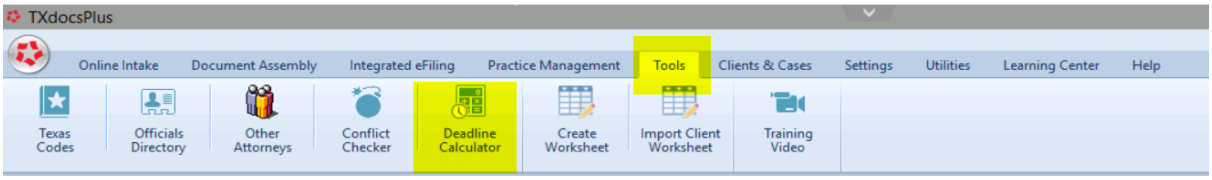
4.8 Deadline Calculator will calculate the due date for any deadline in the Tex. Rules of Civ. Procedure and Tex Civ. Practices and Remedies Code

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.

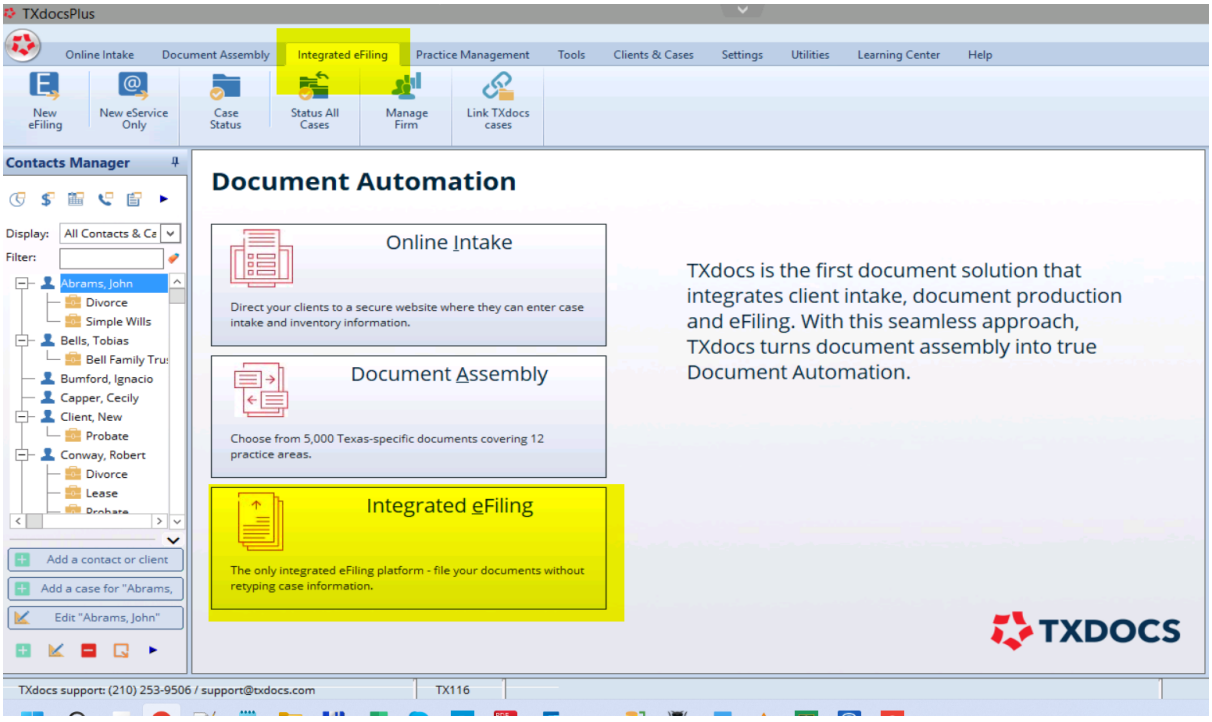
In TXdocsPlus, you can even have the calculator add the deadline to your Deadlines Manager.



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.



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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.

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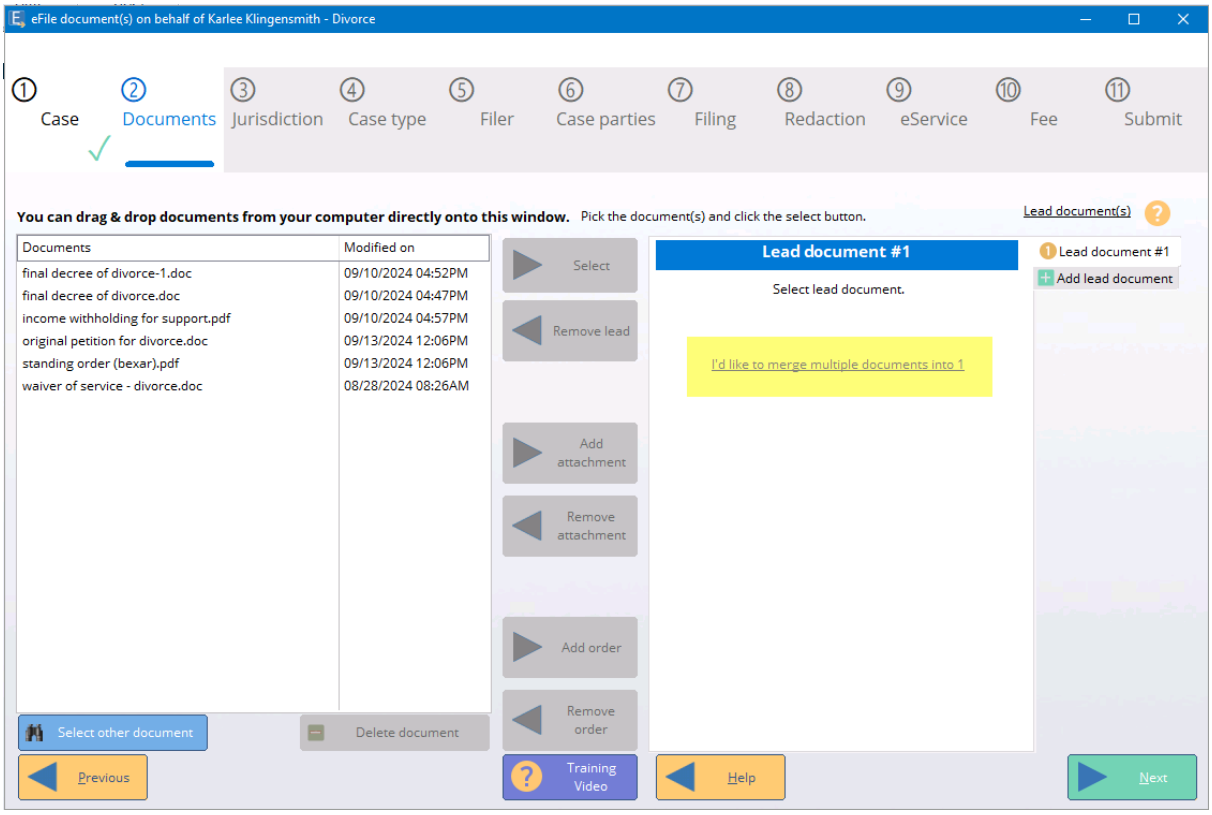

5.4 Tell TXdocs to automatically email courtesy copies of new eFilings

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.

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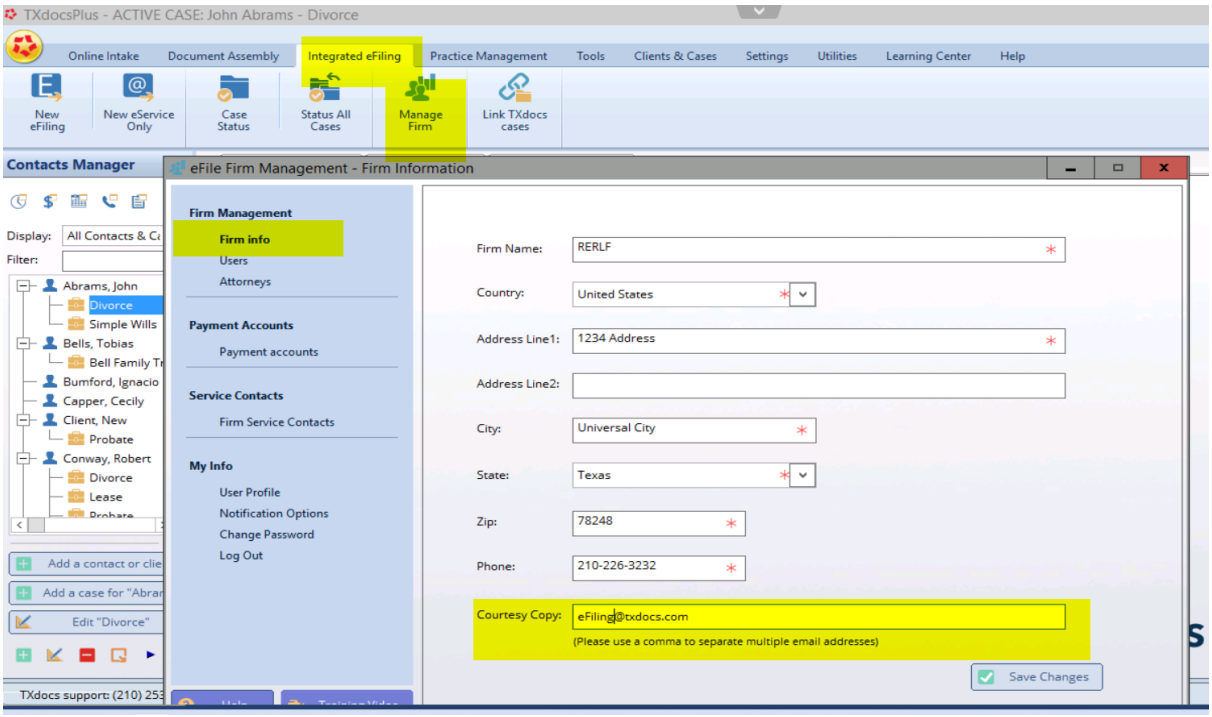
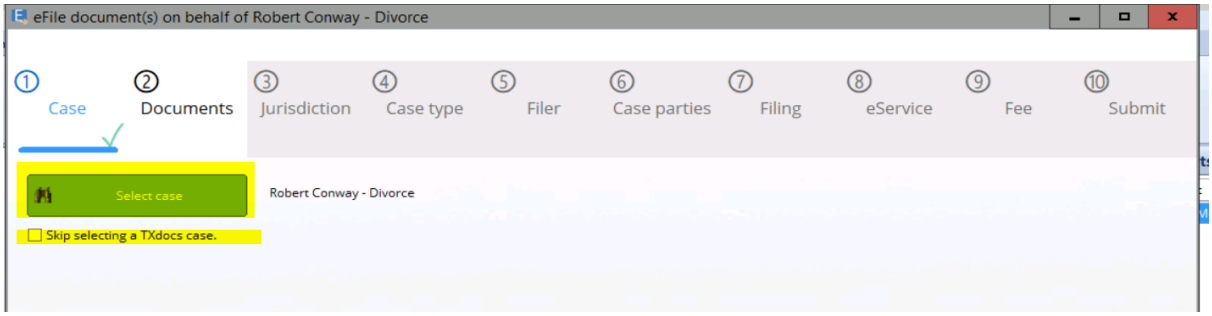


5.5 Select your case to start eFiling so TXdocs can pre-load your case data and save time and typing

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".



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.

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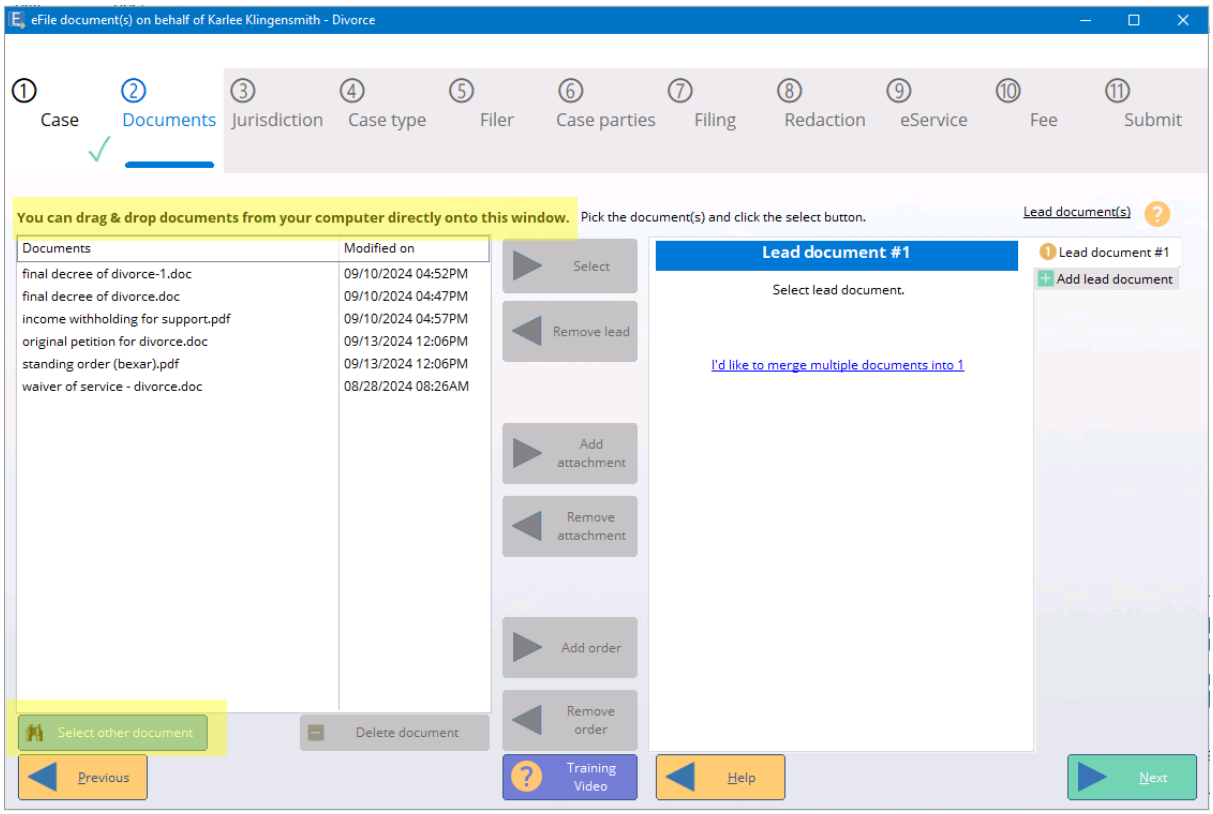
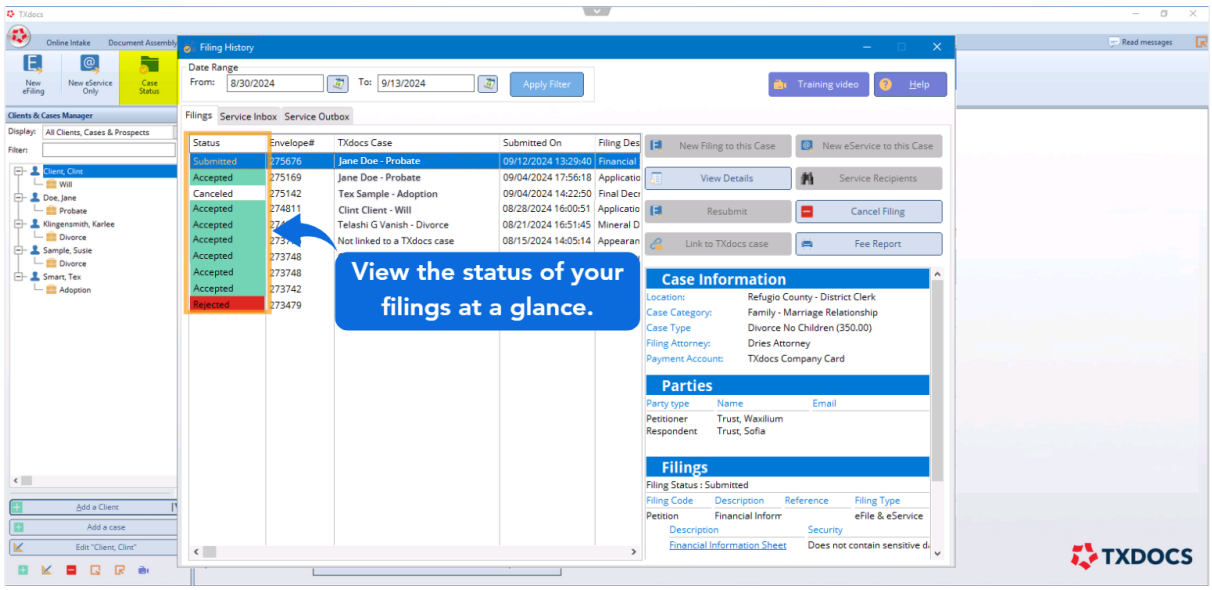


5.7 Check the status of all eFile cases submitted to the court system

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.



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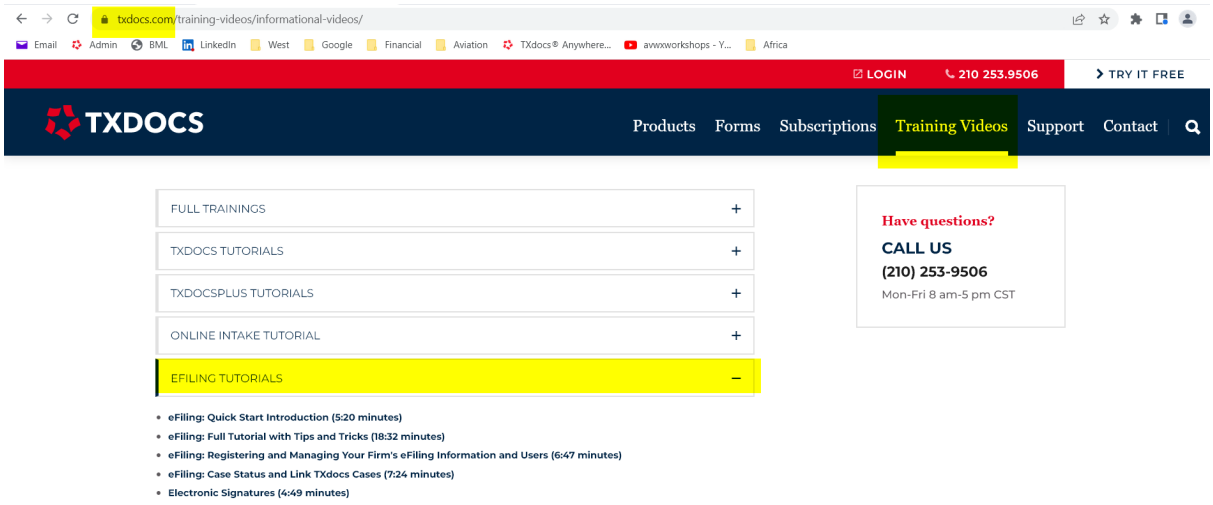
5.8 Watch our eFiling videos to learn about the most sophisticated and easy to use eFiling system in Texas - and it's already in TXdocs

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

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



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.

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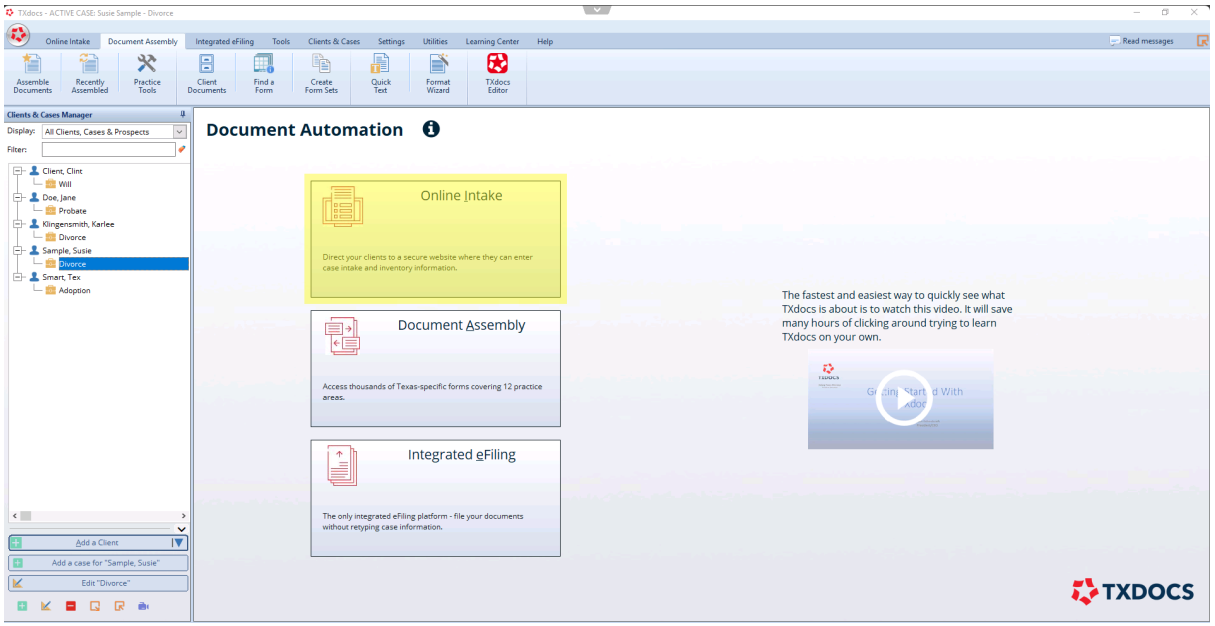
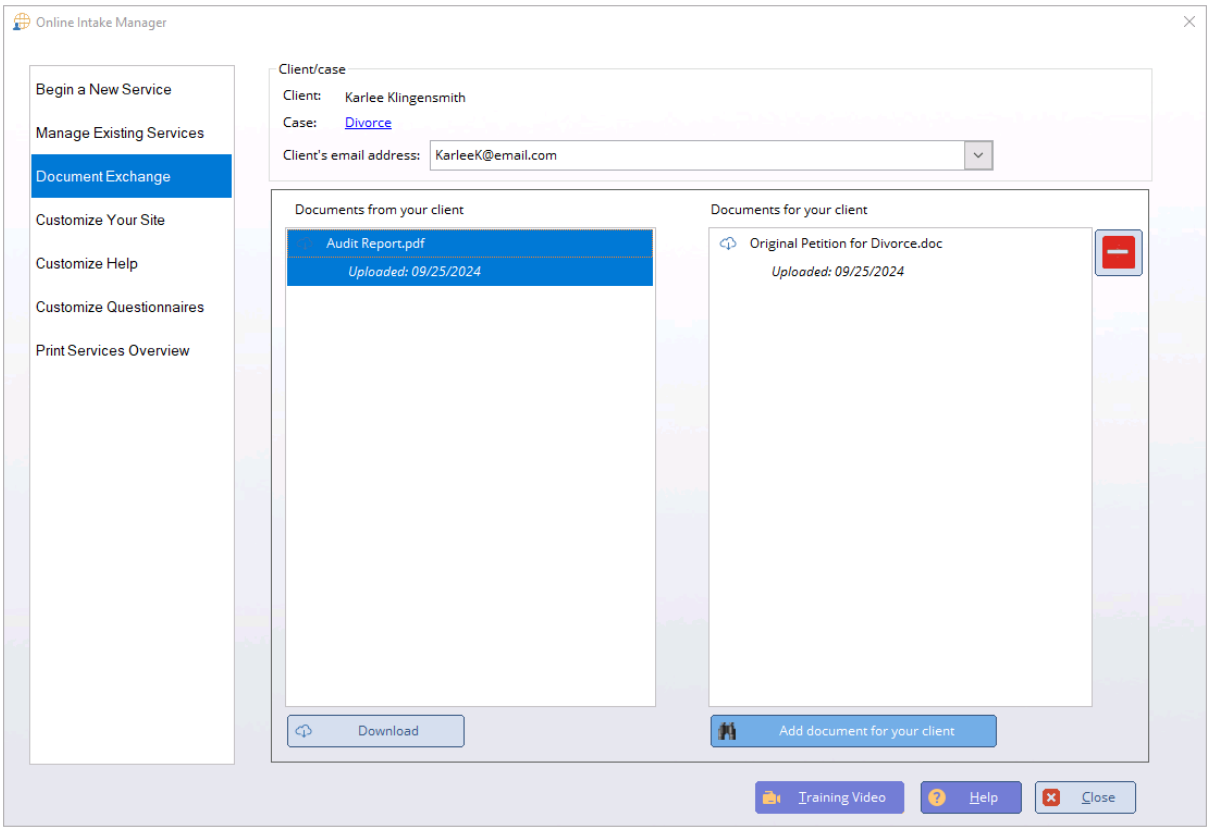


6.1 Document Exchange

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



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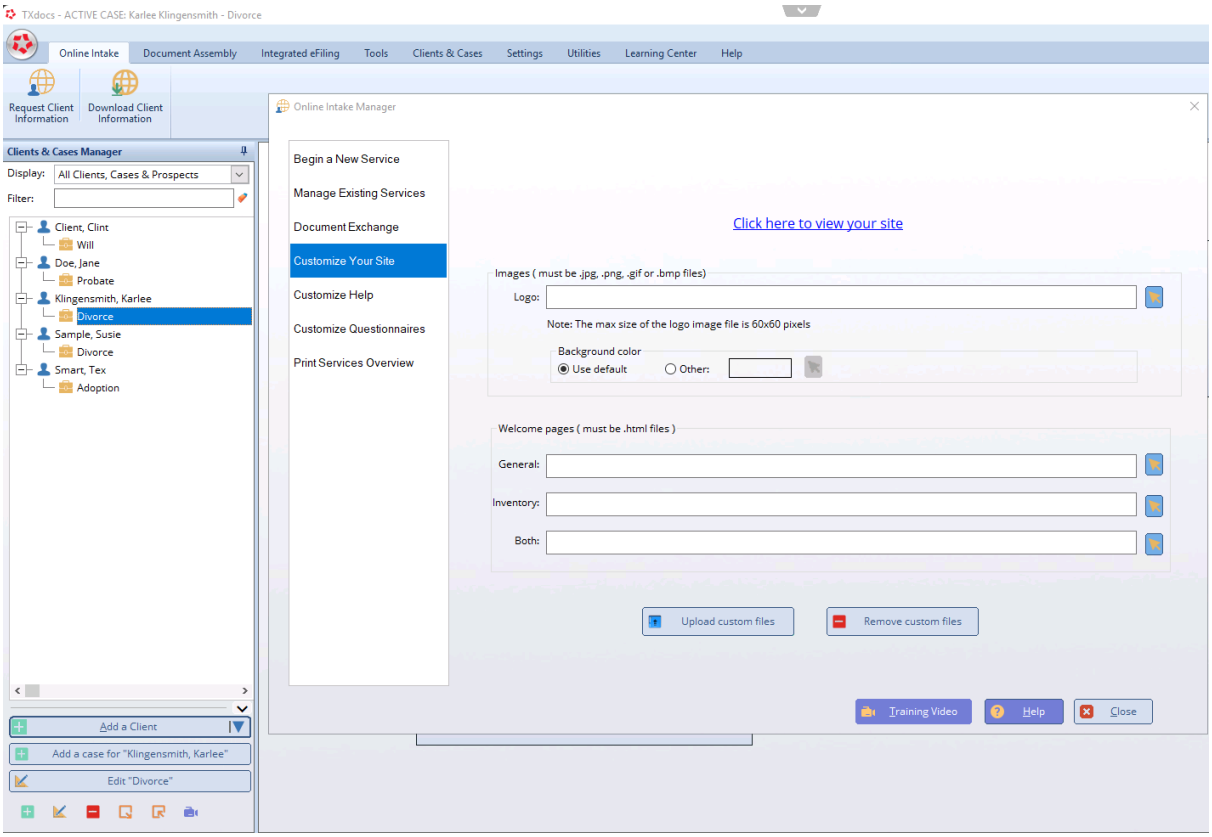
6.2 Customize Online Intake so it looks like your firm's website

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.



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.

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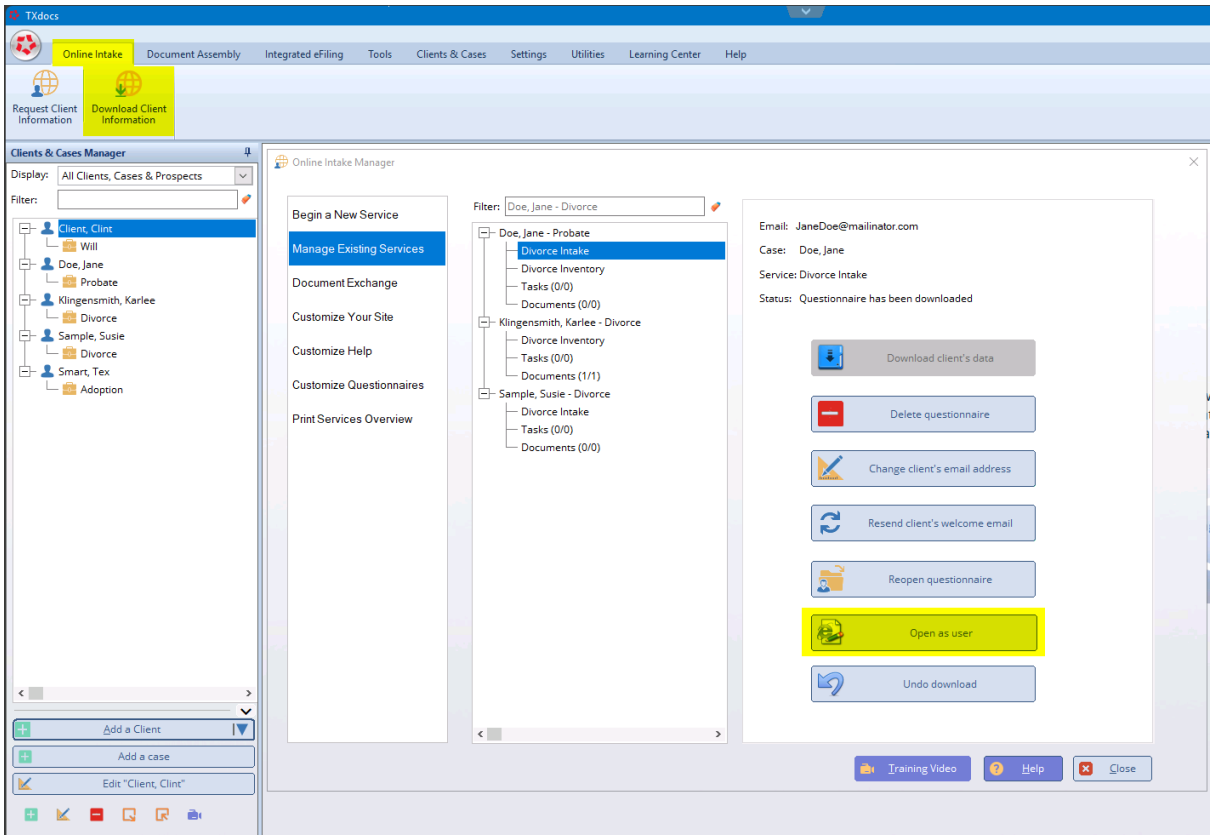

6.4 Sending questionnaires

There are questionnaires available for most practice areas, and you can customize your own. To preview any questionnaire, click its expand button . 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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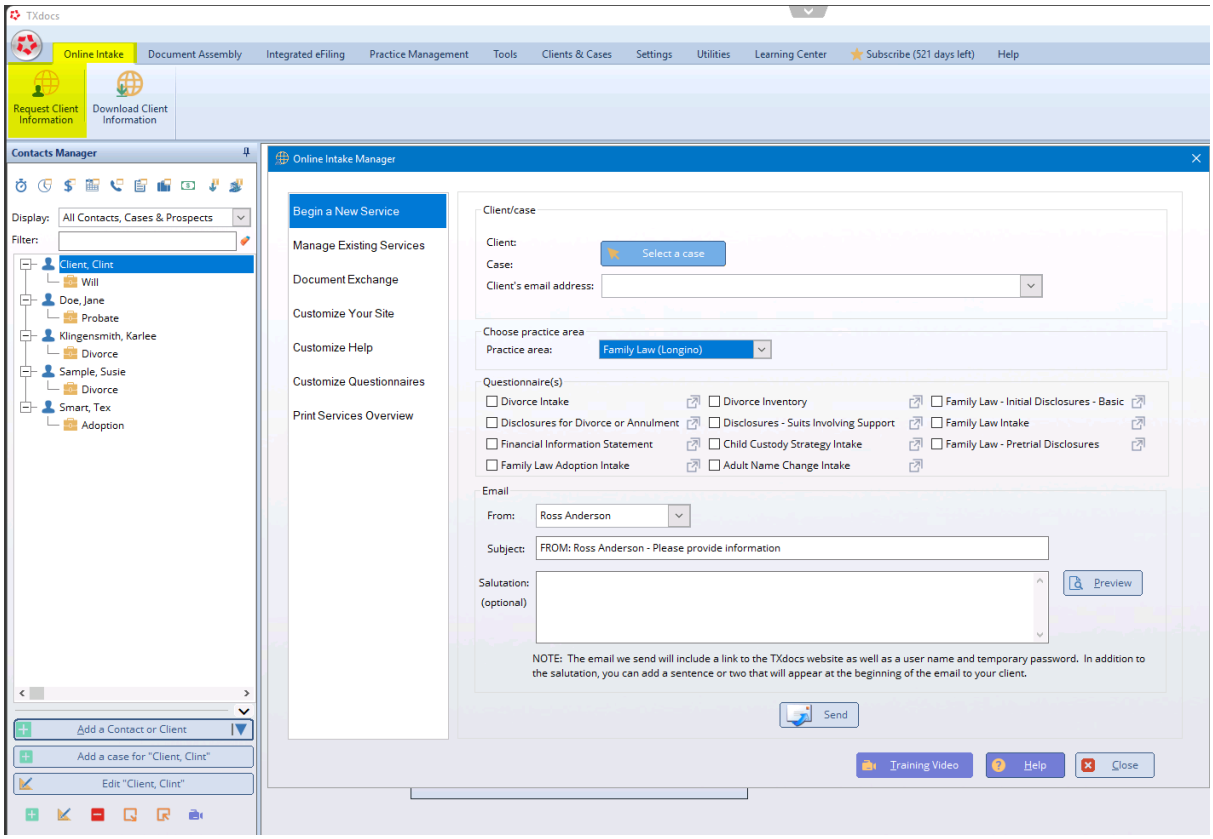
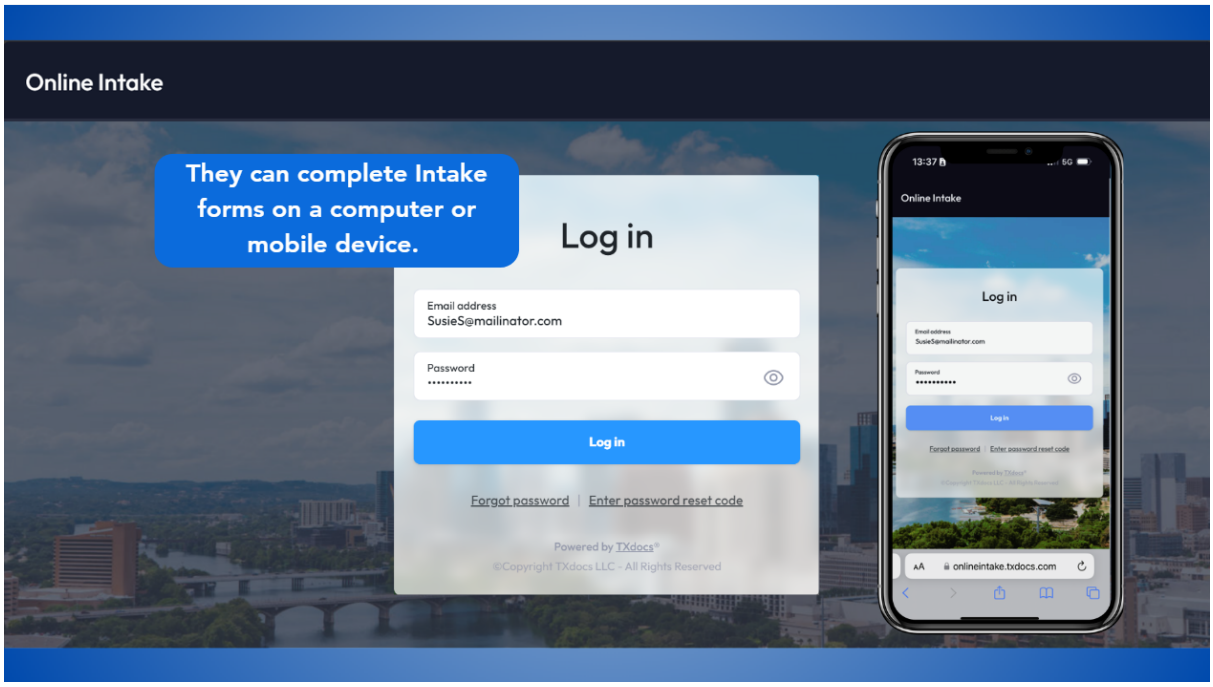


The questionnaires are mobile friendly, adding ease and convenience for your clients, and making the process more efficient and timely for you.



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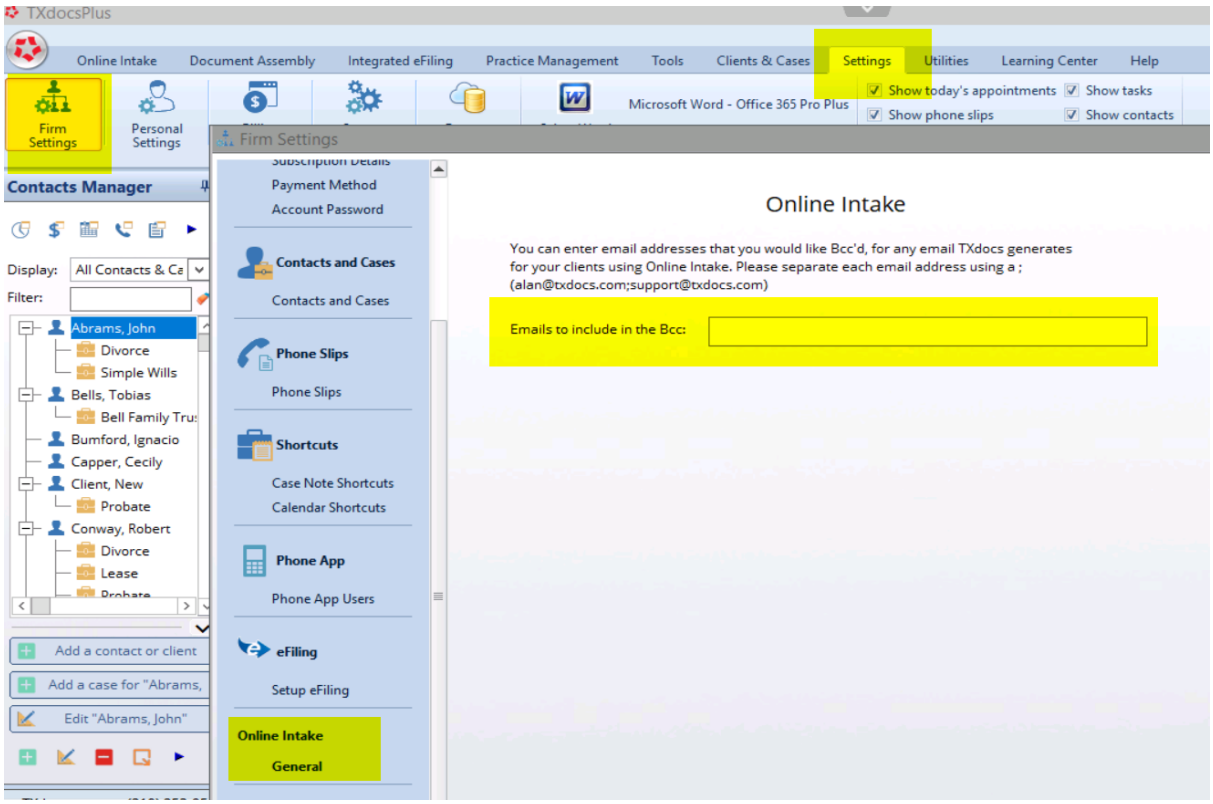
6.5 Set up a bcc so that you automatically receive copies of TXdocs' emails to your client

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.



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.

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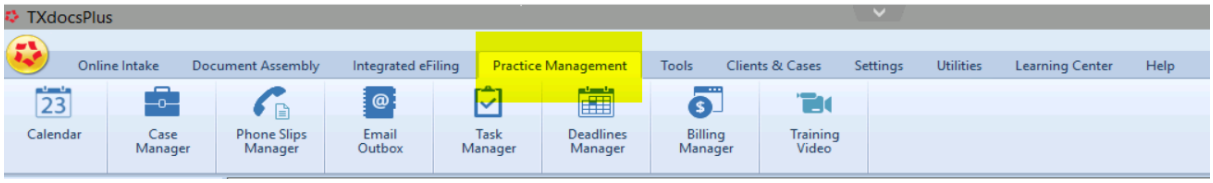
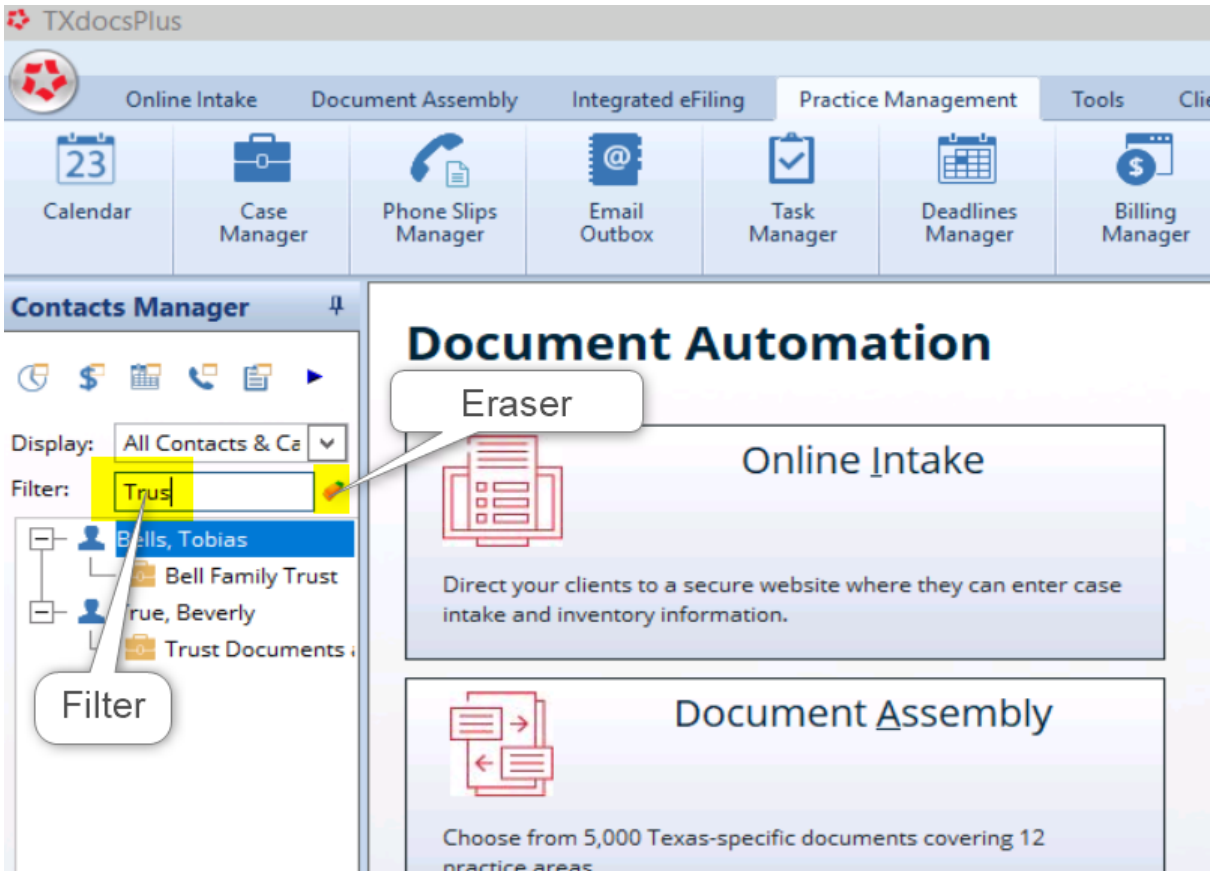


7.1 The Contacts Manager filter allows you to type a word or words and the Contact/Case list will instantly display the contacts and cases containing the word(s)

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.

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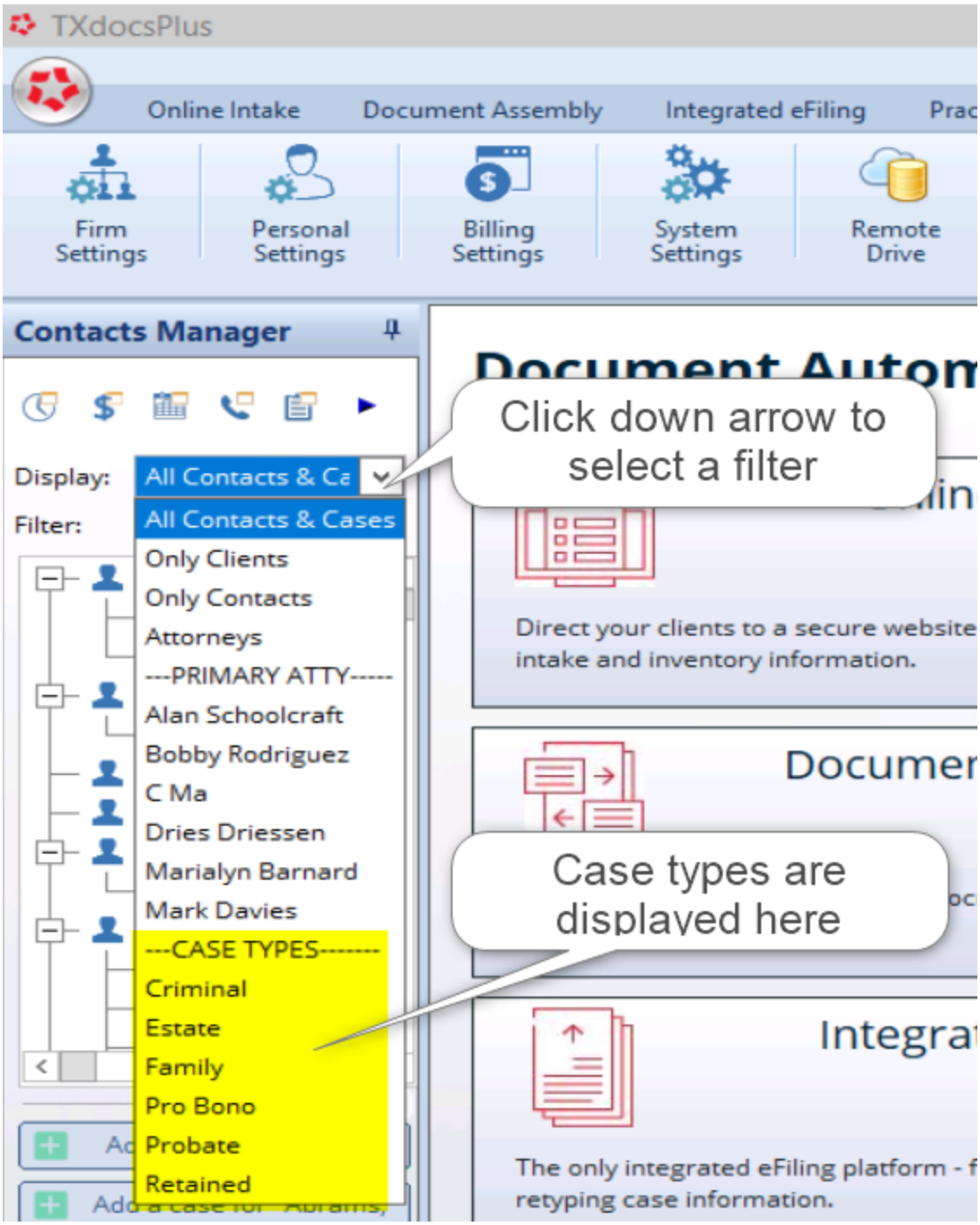
TXdocsPlus has additional Practice Management Capabilities with



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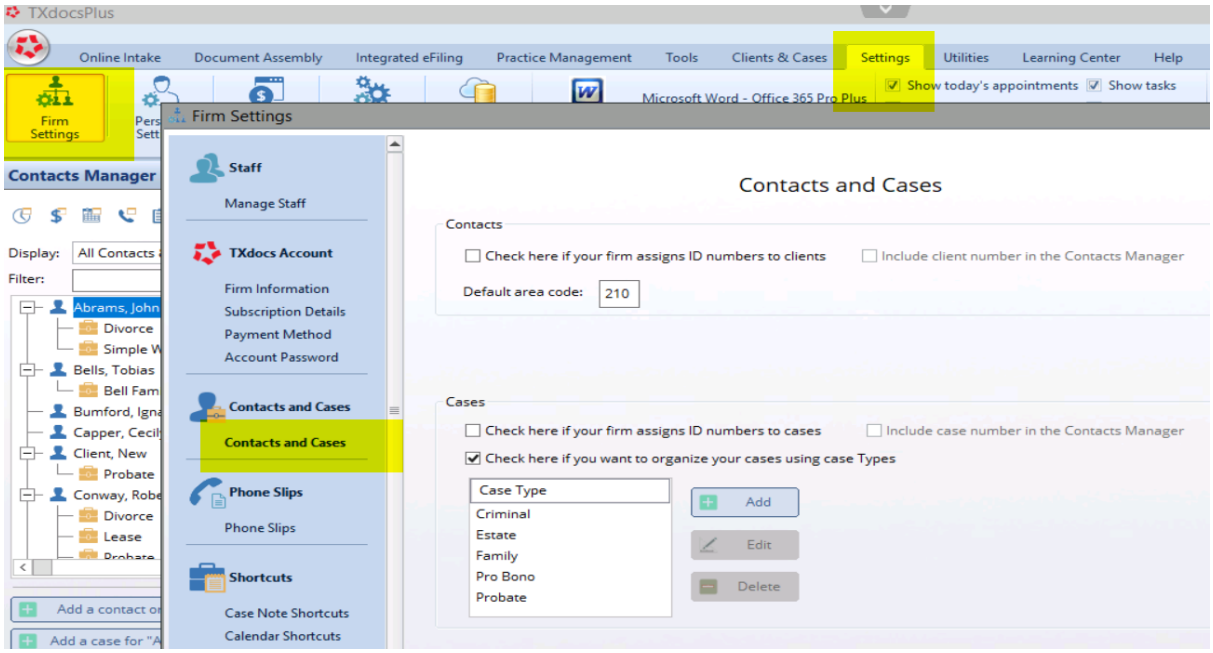
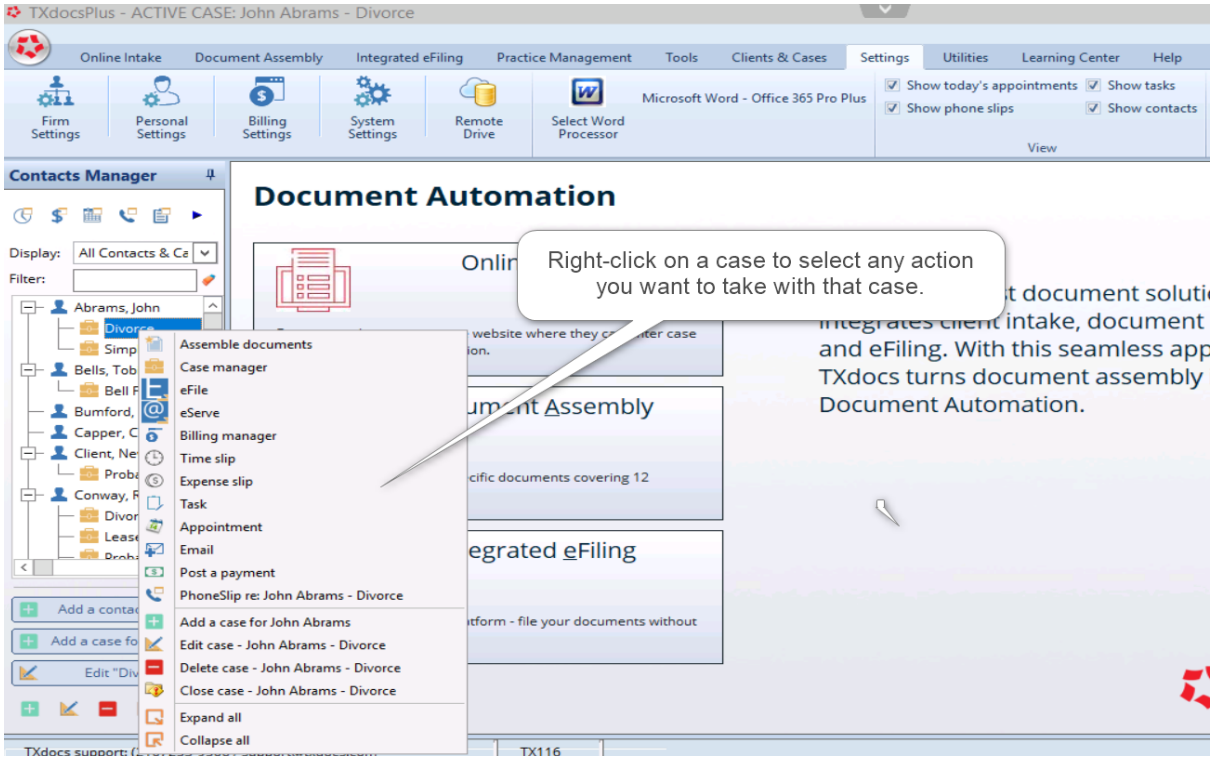


7.3 Right-click on a client or case to see a pop up menu of all actions you can take with the selected item

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.



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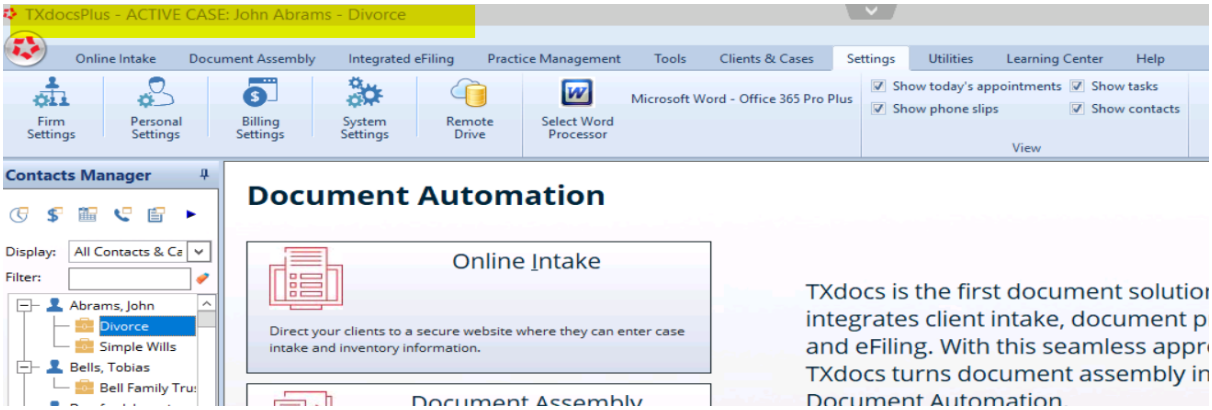
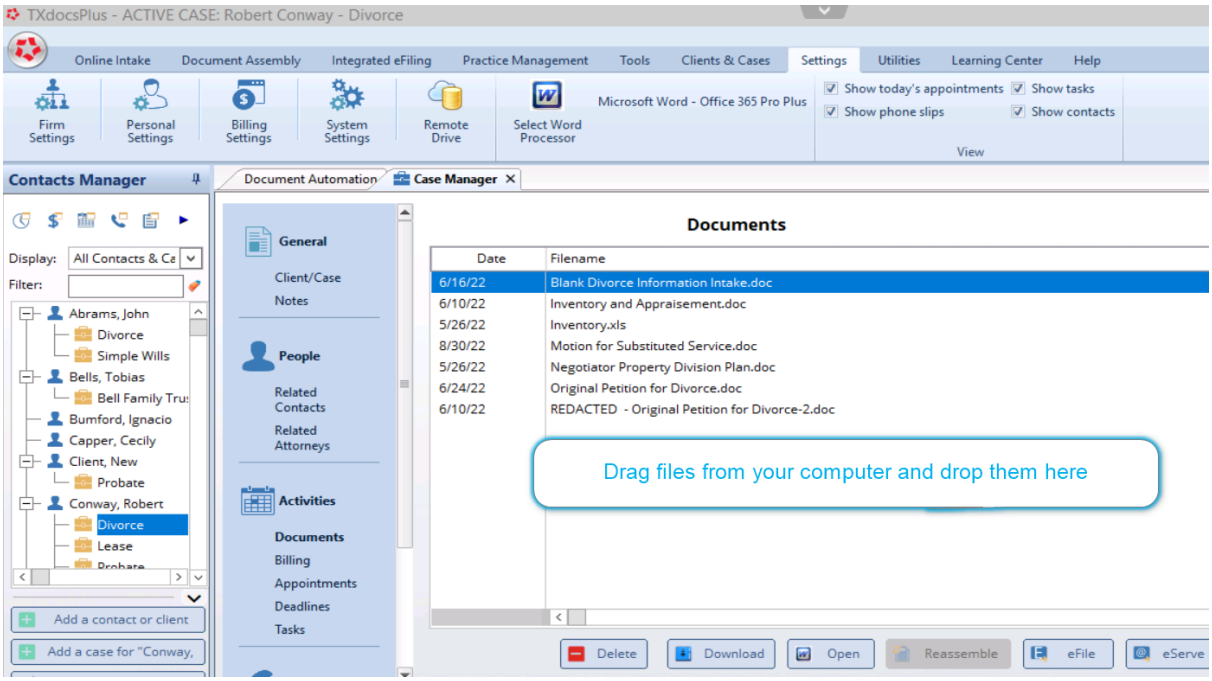
7.4 The active ("selected") case is always displayed on the title bar

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.

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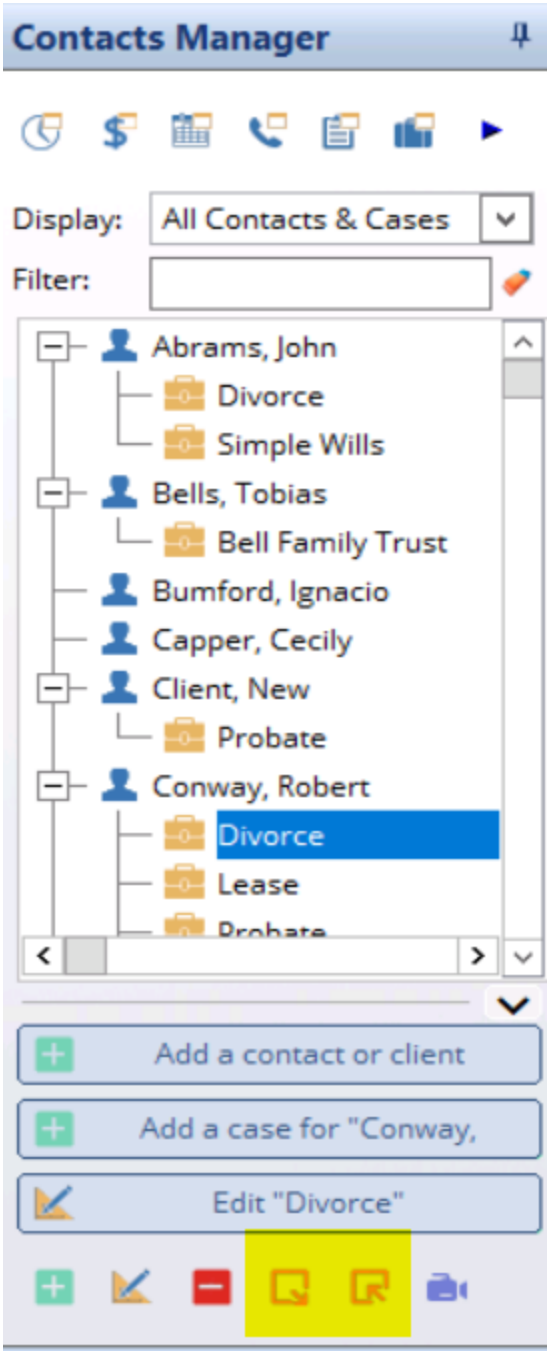

7.7 Tell TXdocs whether you want Contacts Manager to first appear Expanded or Collapsed

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.

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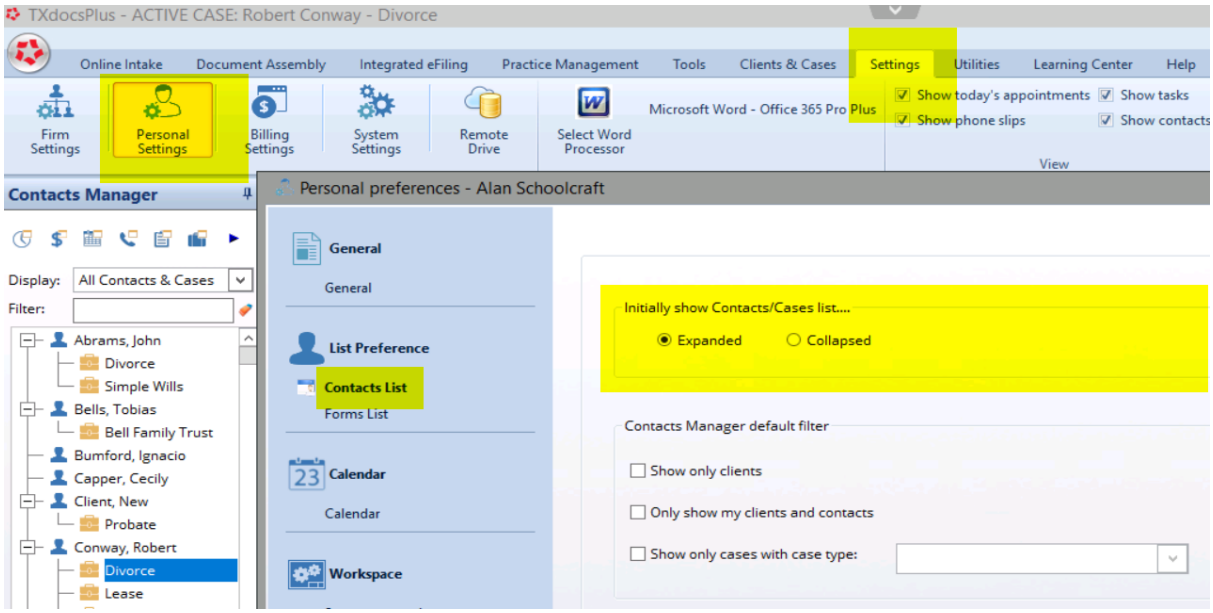
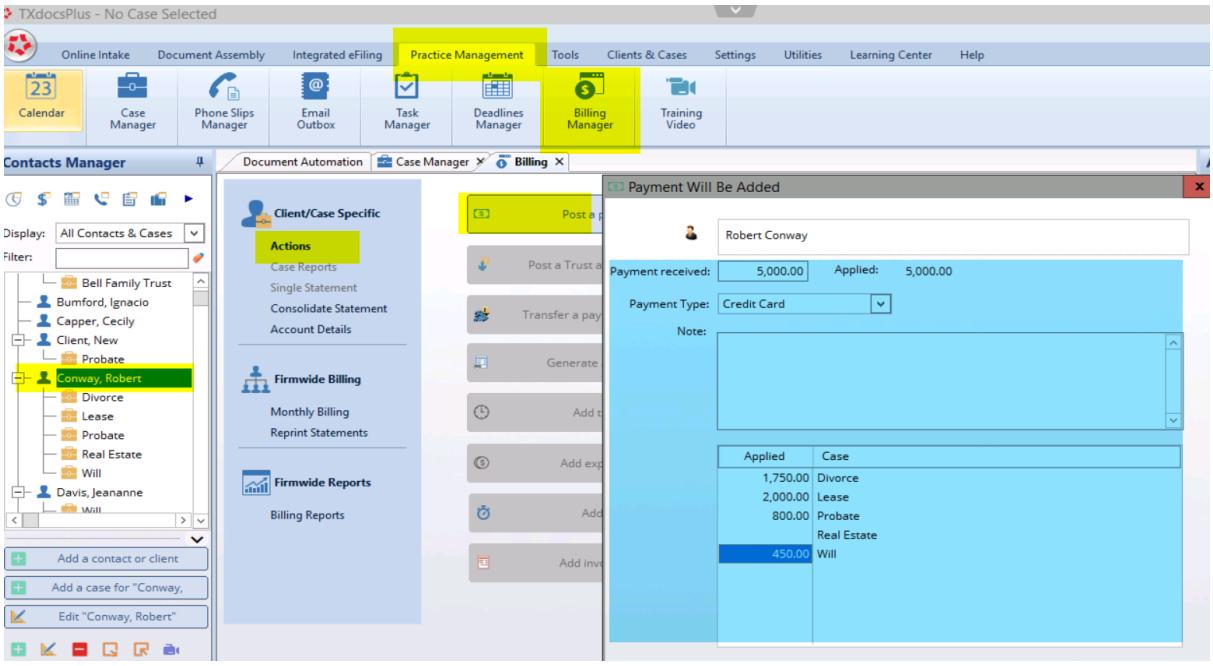


8 Billing

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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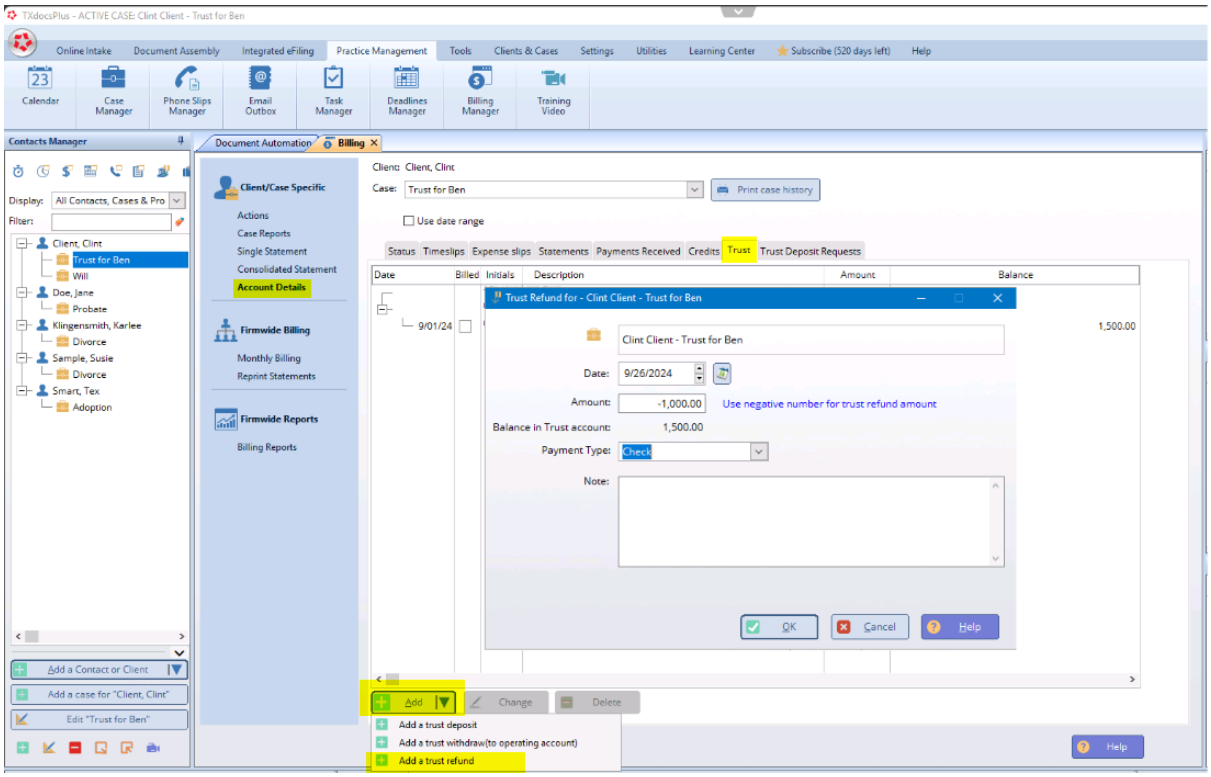
8.2 You can easily refund the trust balance to your client

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'.

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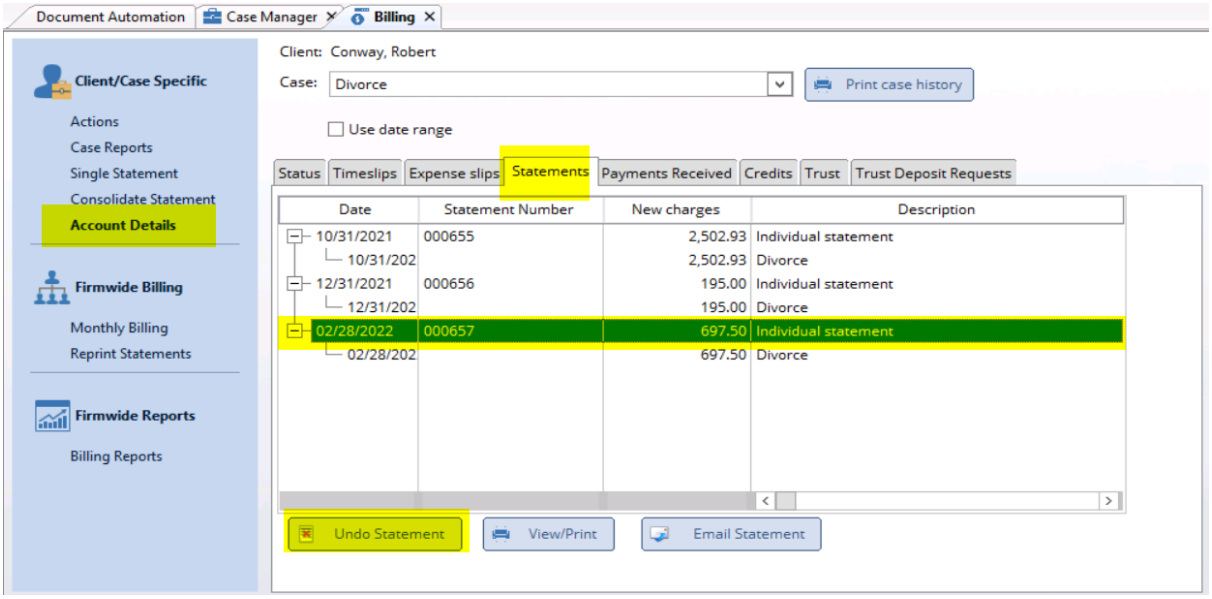
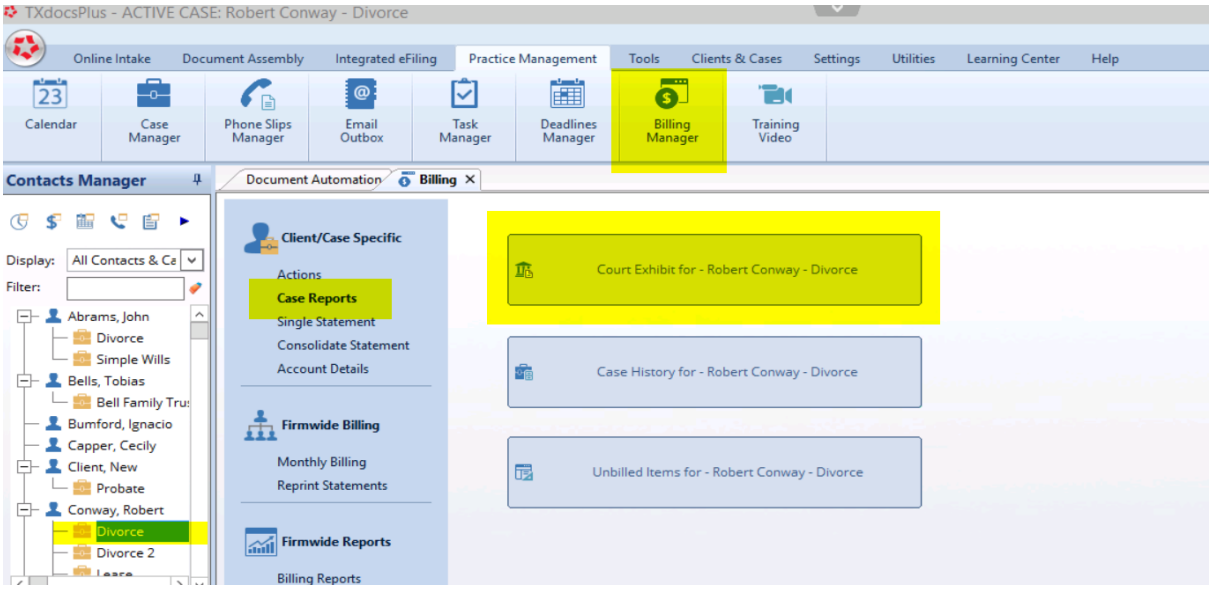


8.4 Print a Court Exhibit report to prove up your fees and expenses

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.



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.

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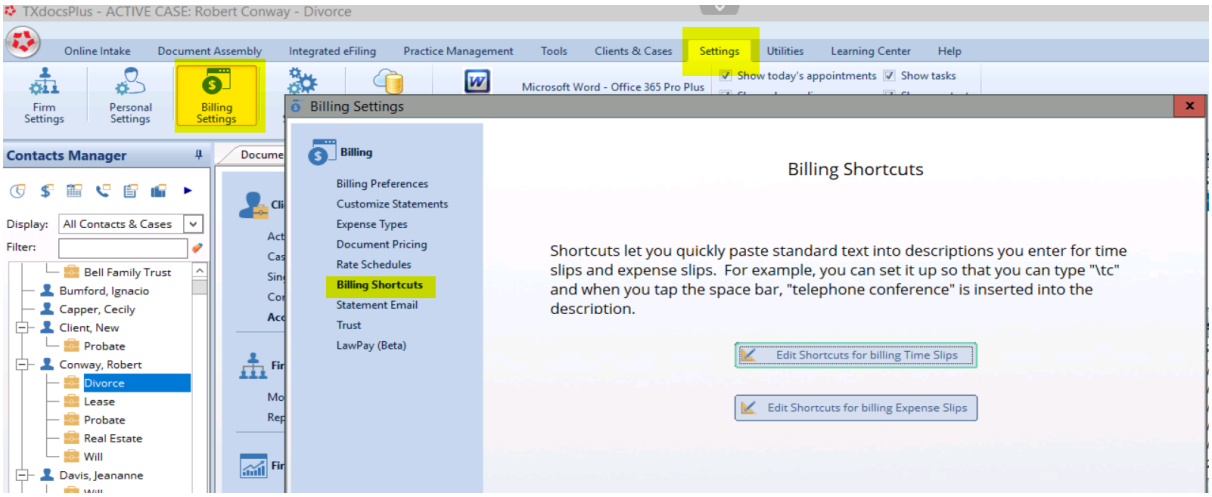
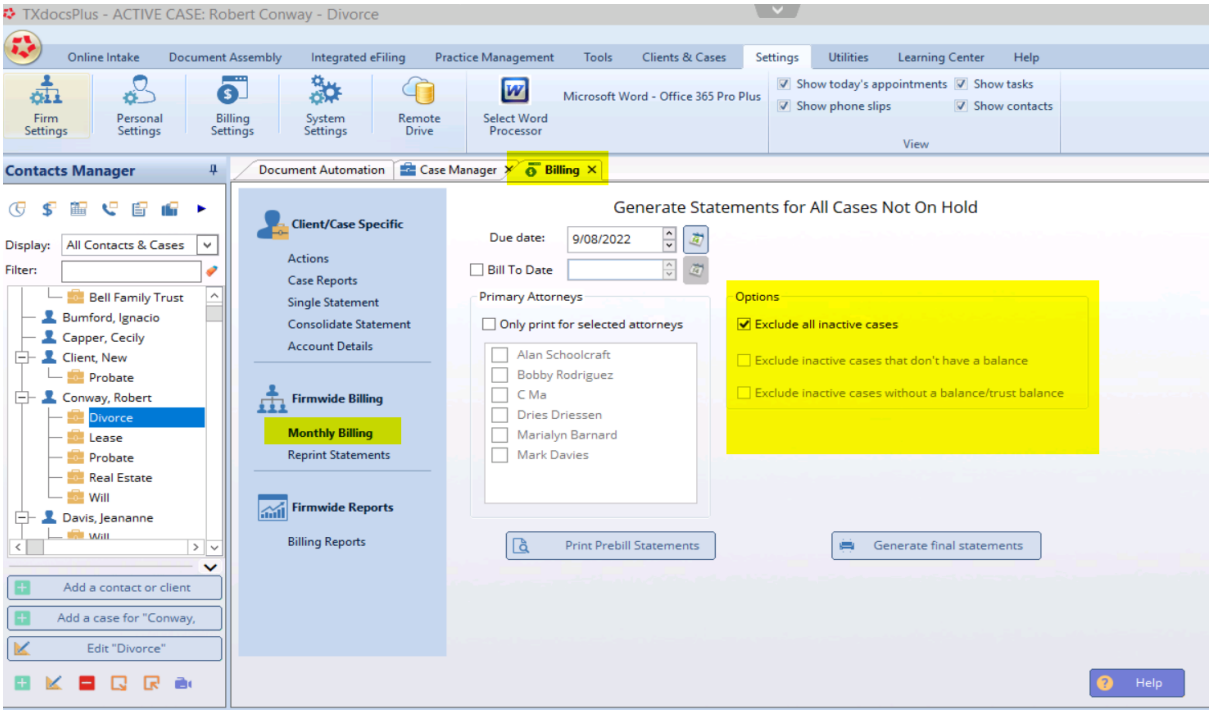


8.6 When generating monthly statements, you can exclude (1) Inactive cases or (2) Inactive cases except with balance due or (3) Inactive cases except with balance due trust balance

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



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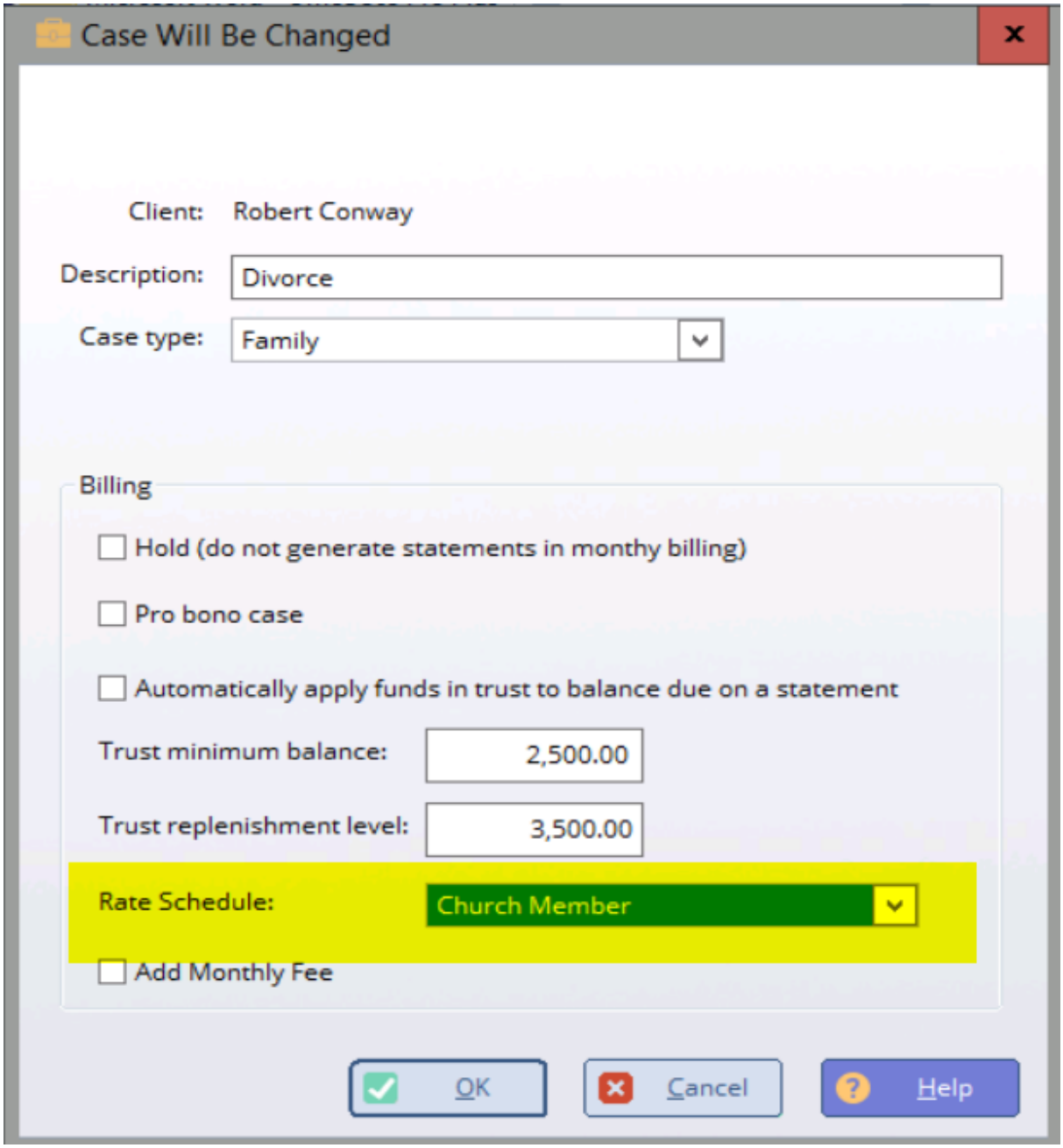
8.7 Use Rate Schedules to set up standard rates for different types of cases, for different situations or for different staff members

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.



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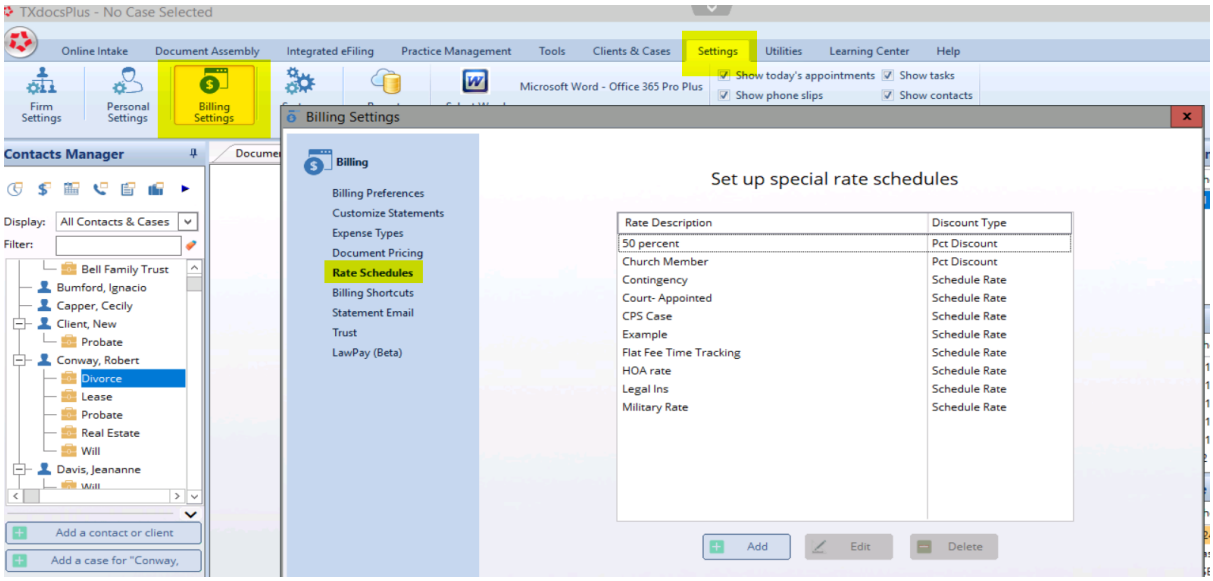
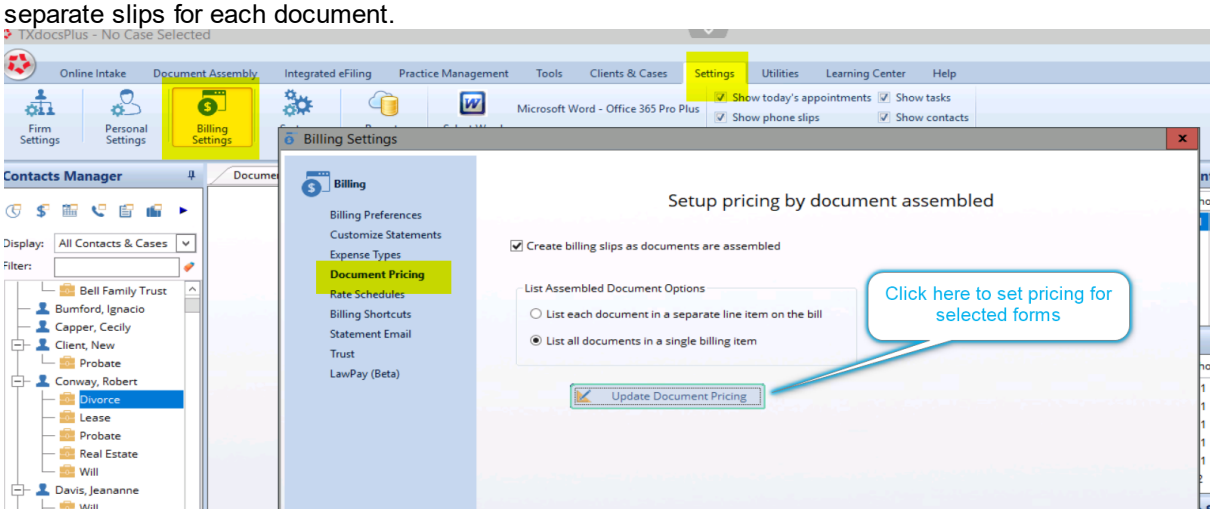


8.8 Document pricing can be used to have TXdocs automatically create a billing slip with a standard price for the selected document

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.

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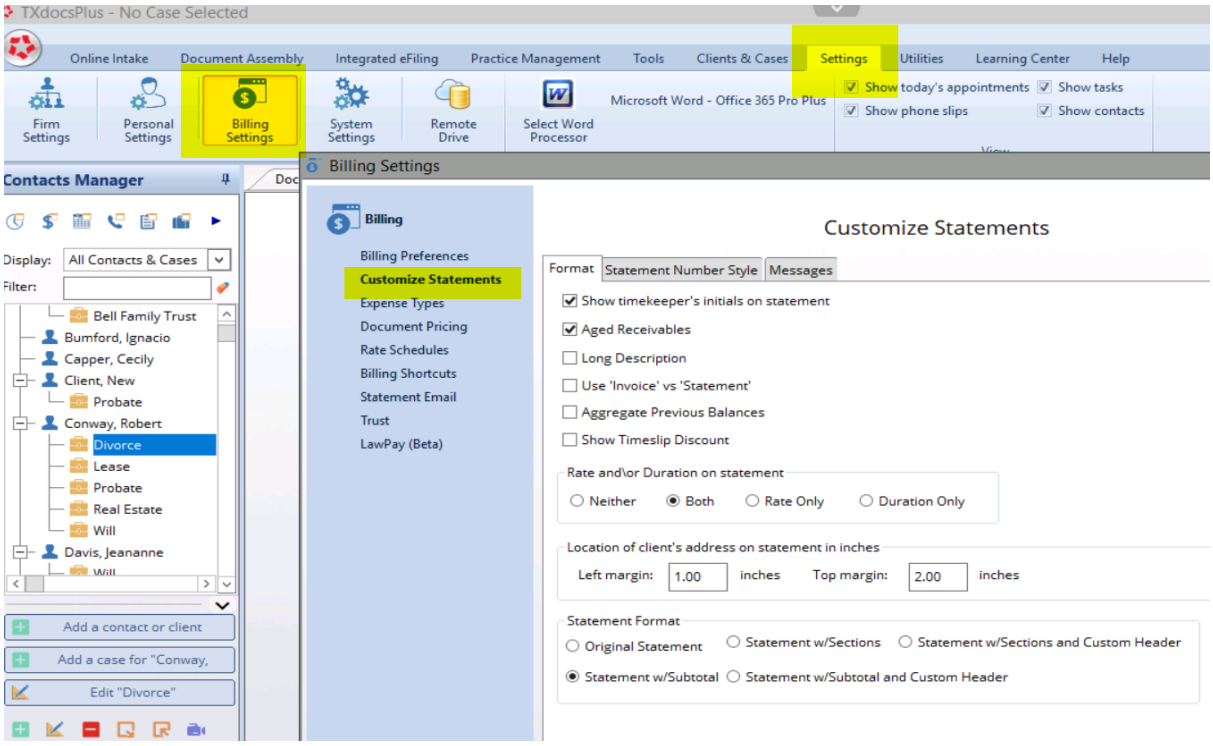
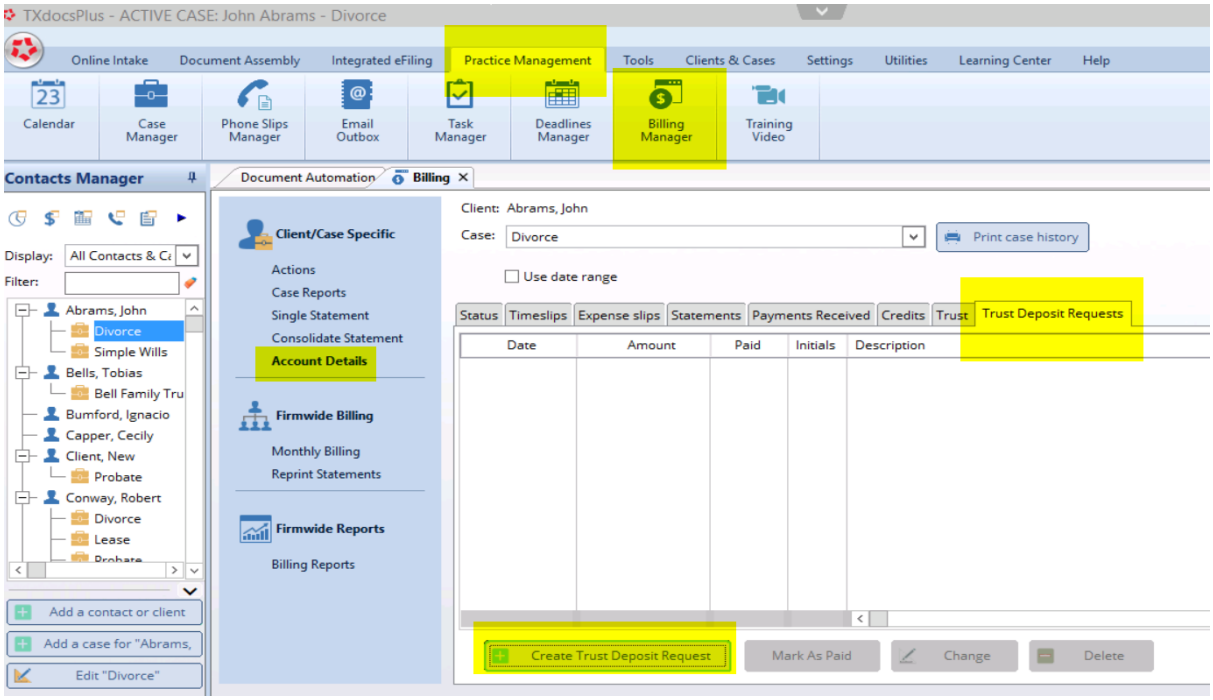


8.10 Trust deposit request

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.



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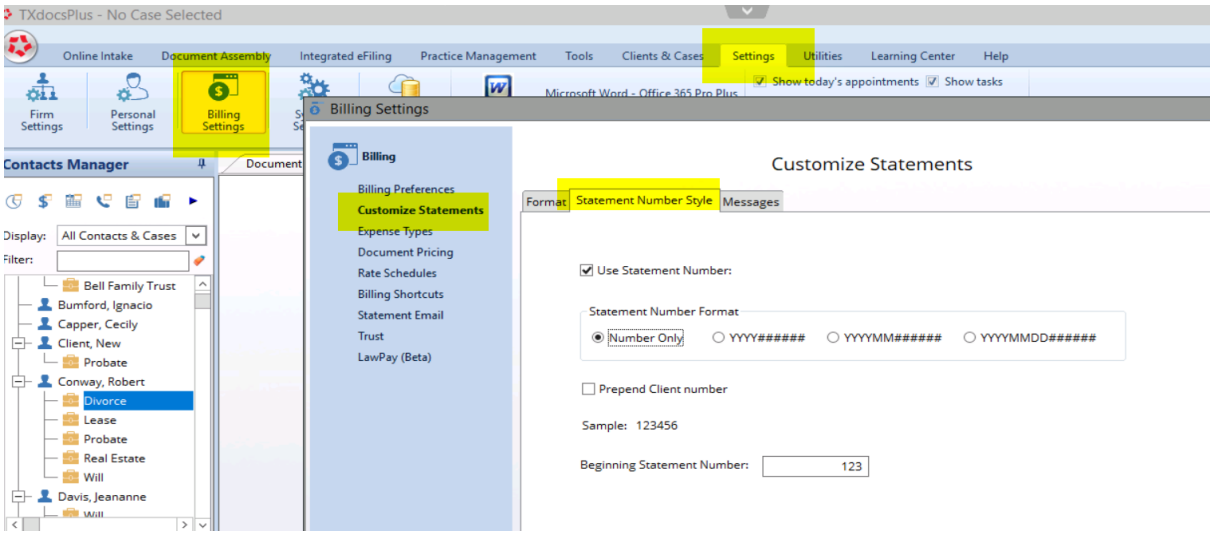
8.11 Statement numbers

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.



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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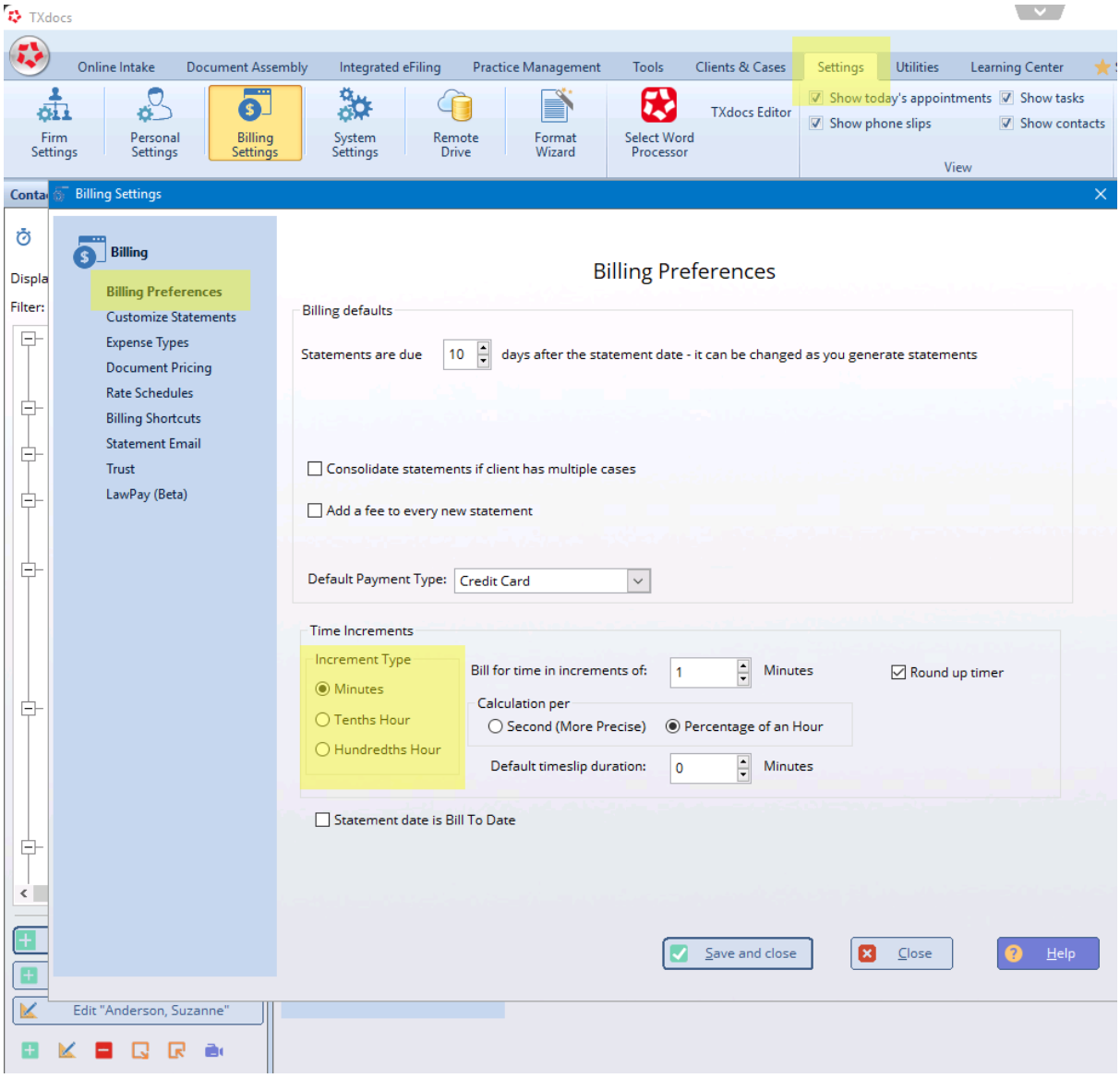

9 Calendar

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.

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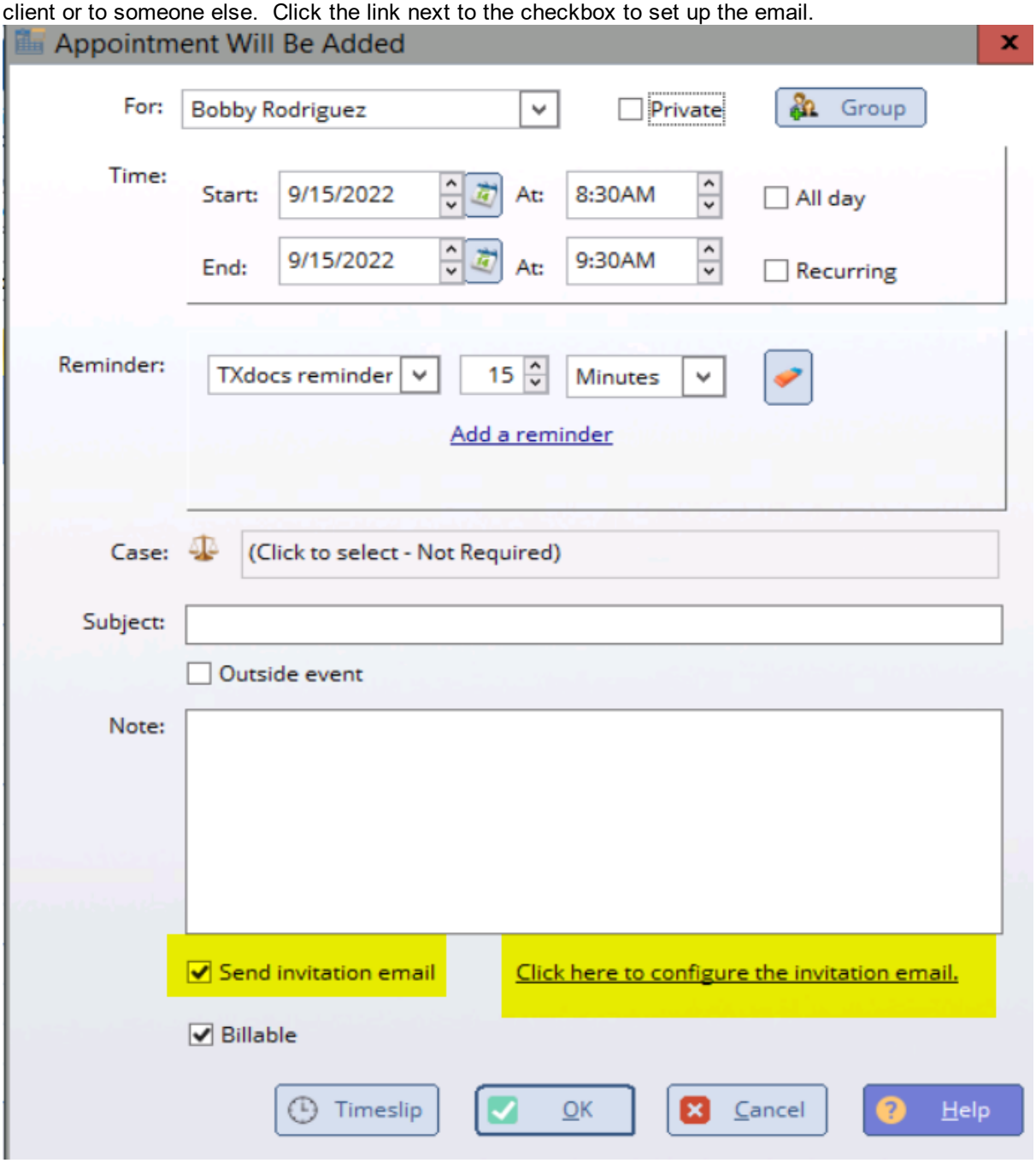
9.2 When you create an appointment you can have TXdocs email an invitaton for the appointment

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.



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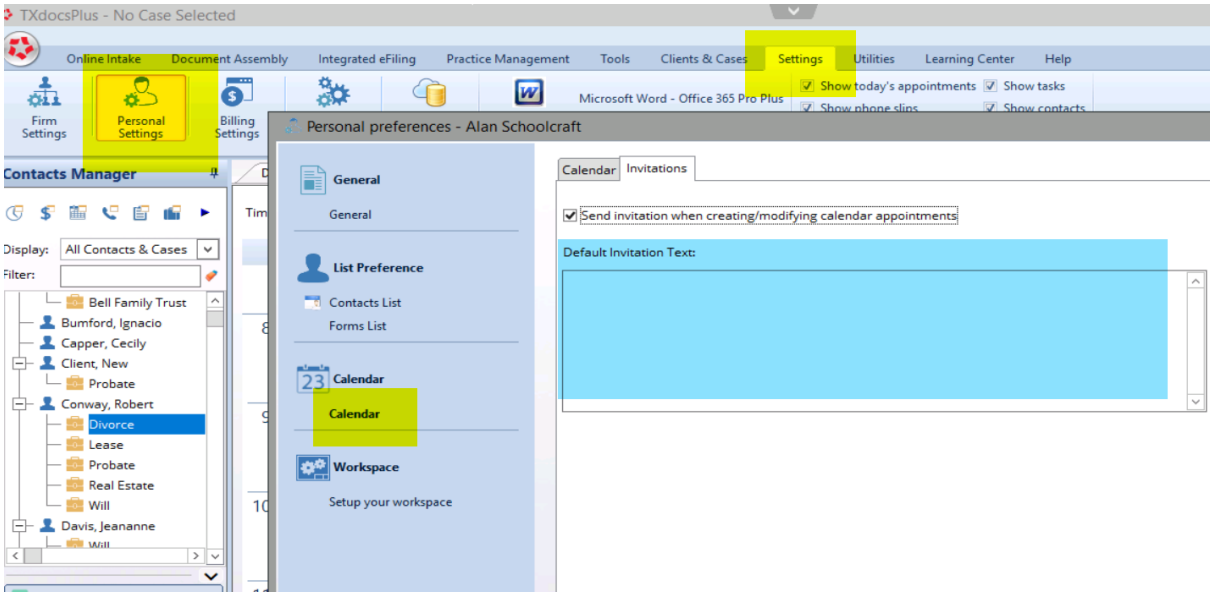
9.3 You can easily create default text for TXdocs to include in calendar invitations

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.



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.

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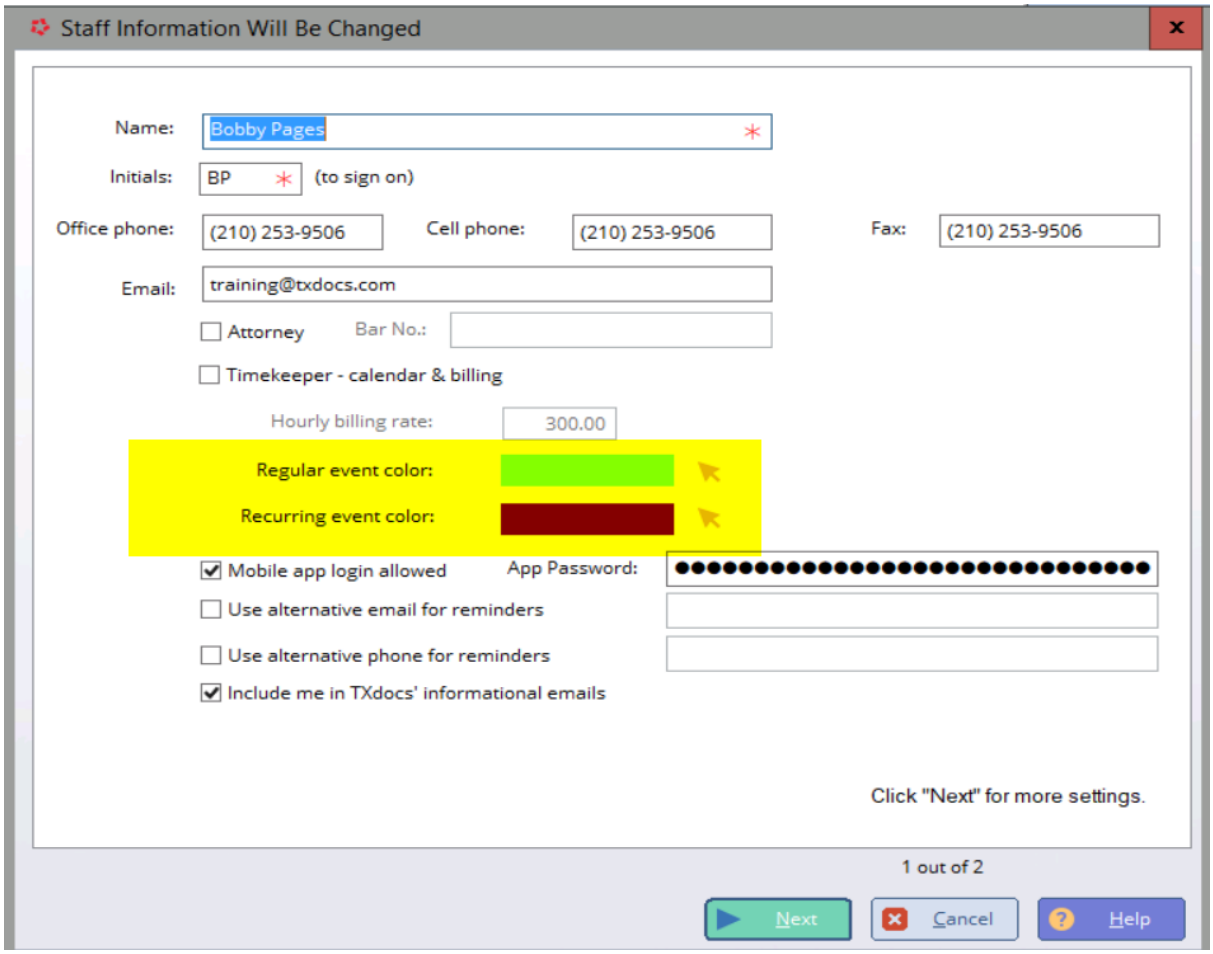

10 Timer

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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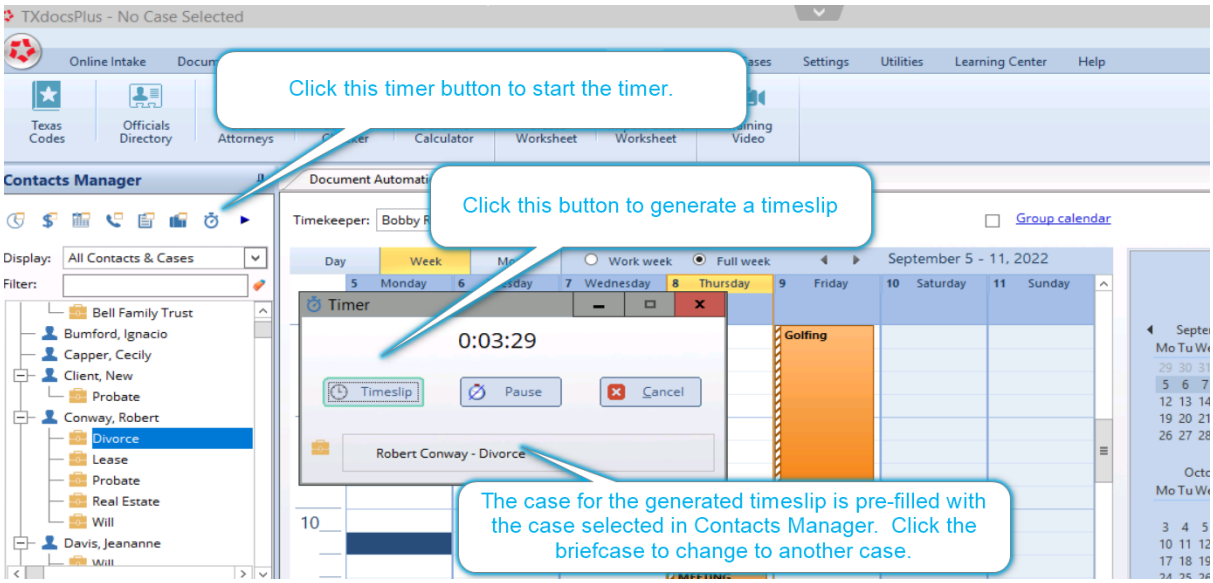

11 General

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

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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.

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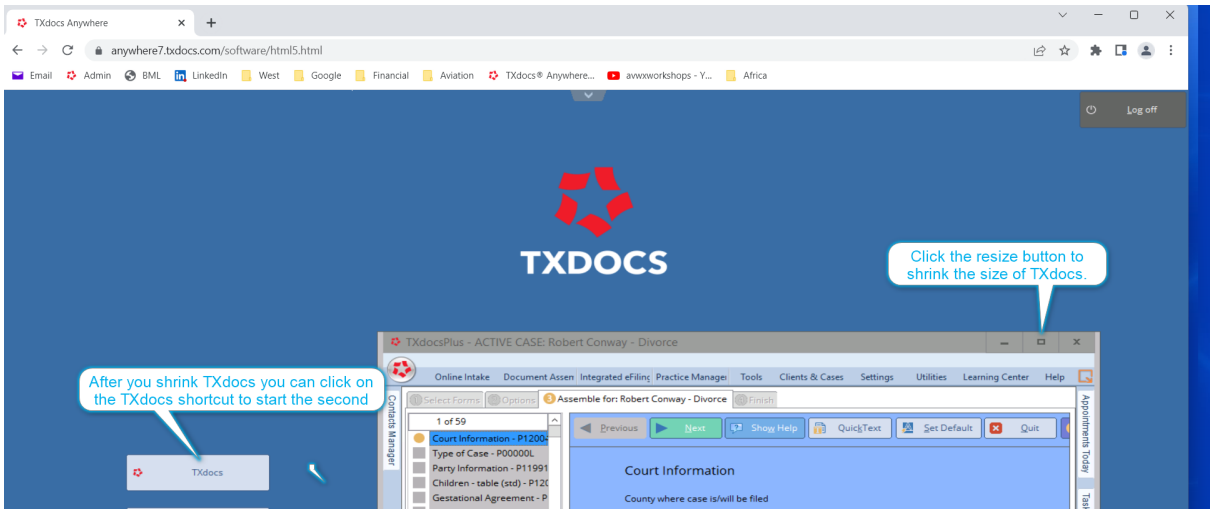
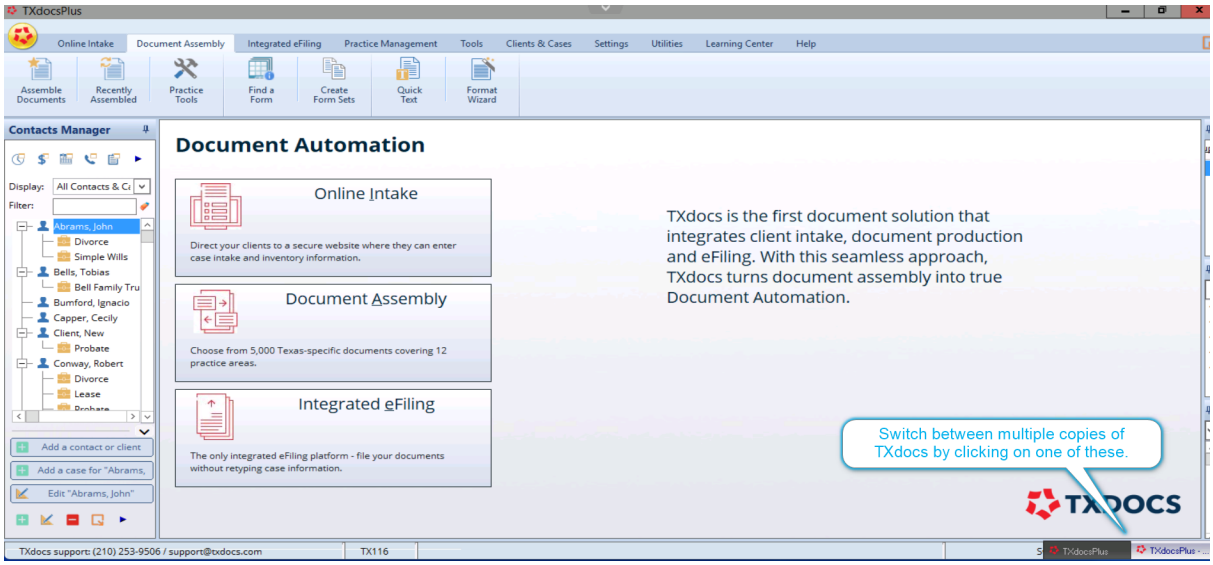
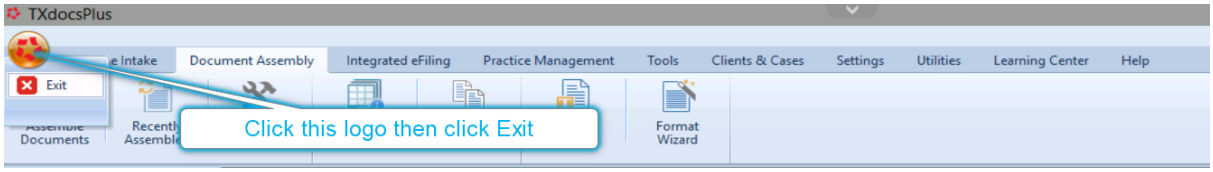




11.4 Always 'Exit' TXdocs to make the license usable by others in your firm

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.



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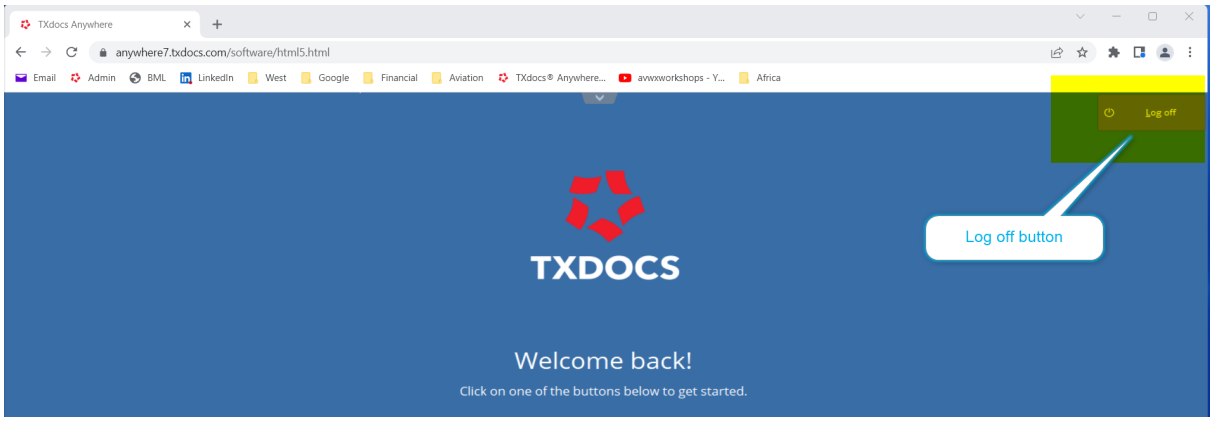
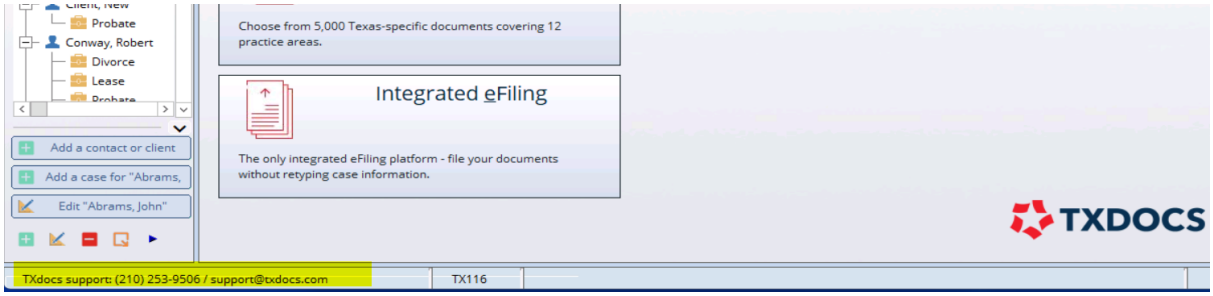


12 Getting Help

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

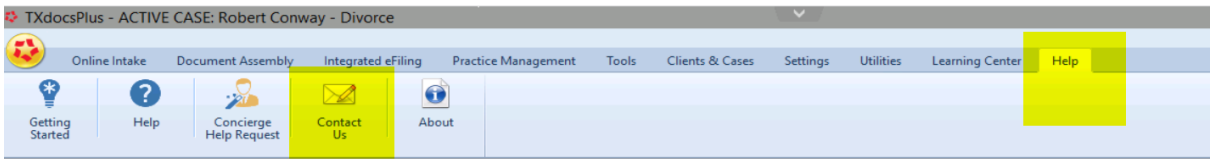
The phone number and email address for TXdocs support are always visible on the bottom left corner of TXdocs. Please do not hesitate to contact us when you need help.



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.



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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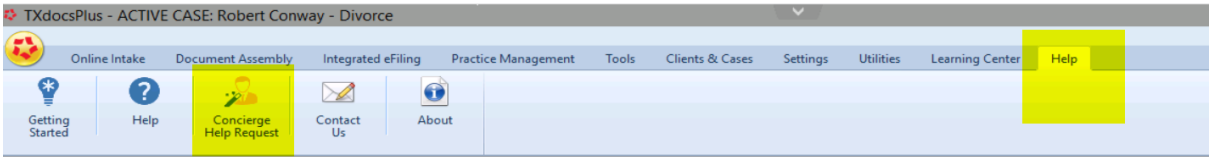


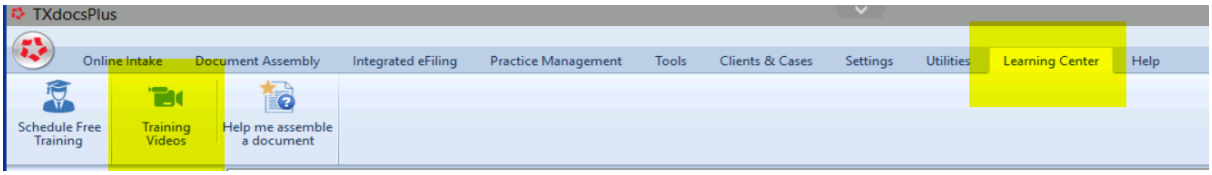
12.4 The TXdocs Facebook user forum is where users meet to exchange ideas and information

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.



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