

Phone App

User Manual

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1 TXdocs Phone App

TXdocs Phone App

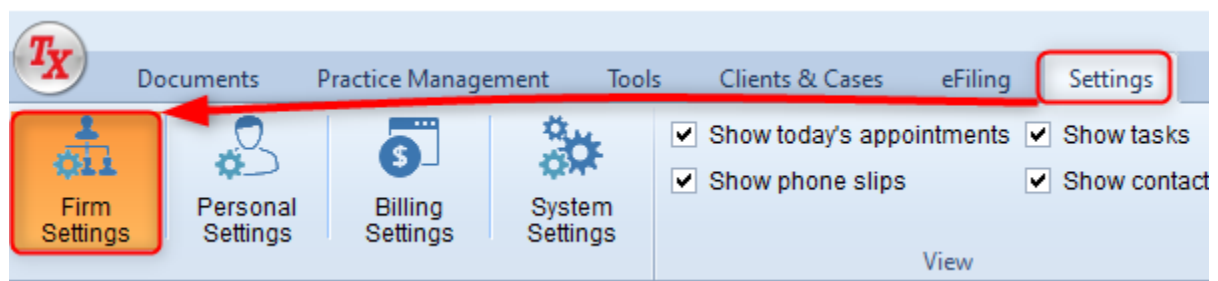
This app will allow you to view appointments, client information and tasks that were created in TXDocsPlus. You will also be able to create appointments, tasks, expense slips and time slips in the phone app.

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

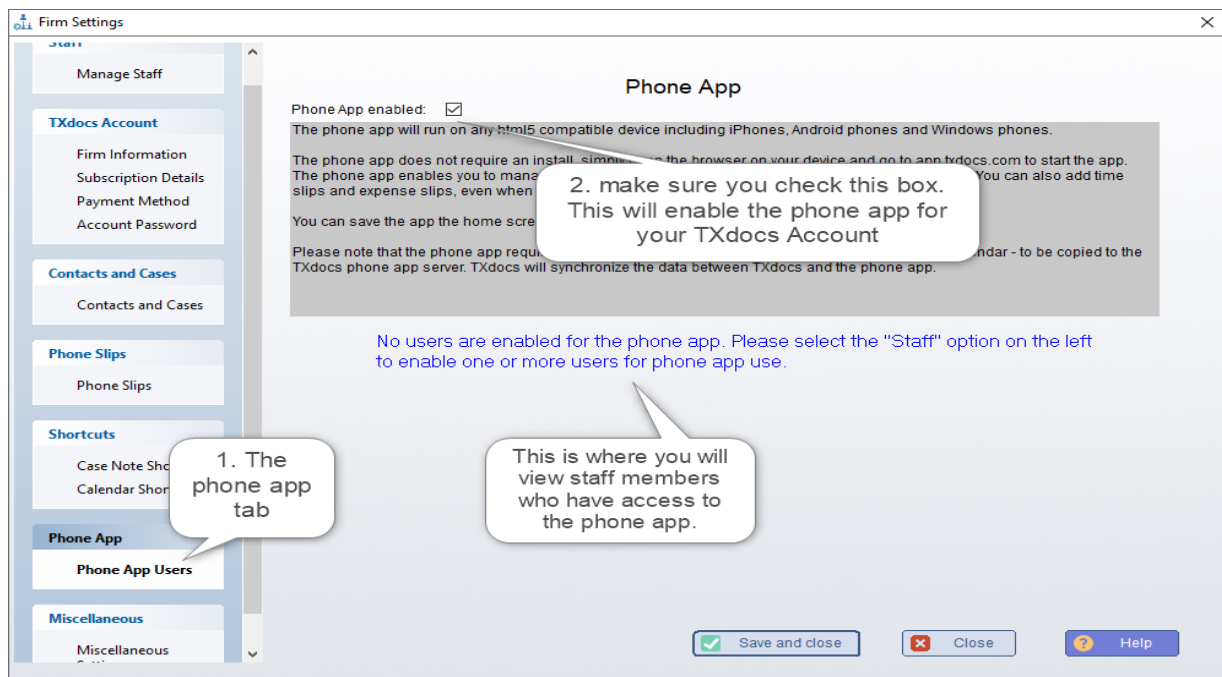
1.1 Enabling the App

Setup: Enable phone app in TXDocsPlus

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



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



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

The screenshot shows the 'Firm Settings' window with the 'Staff' tab selected. The 'Staff Members' list on the left has 'Harrison' selected. The right pane shows details for Harrison, including contact information and checkboxes for 'Attorney' and 'Timekeeper'. Three callouts provide instructions: 1. Select the Staff tab (pointing to the Staff tab in the left sidebar), 2. Select the staff member you want to have access to the app (pointing to 'Harrison' in the list), and 3. select Edit (pointing to the 'Edit' button below the list). The bottom of the window has 'Save and close', 'Close', and 'Help' buttons.

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

The screenshot shows the 'Staff Information Will Be Changed' dialog box. It contains fields for Name, Office phone, Cell phone, Fax, Email, and Initials. There are checkboxes for 'Attorney', 'Timekeeper - calendar & billing', 'Mobile app login allowed', 'Use alternative email for reminders', 'Use alternative phone for reminders', and 'Include me in TXdocs' informational emails'. The 'Mobile app login allowed' checkbox is checked. The 'App Password' field is masked with dots. The 'Use alternative email for reminders' and 'Use alternative phone for reminders' fields are highlighted with a red box. Two callouts provide instructions: 'Select this box to allow access to the app for the staff member selected' (pointing to the 'Mobile app login allowed' checkbox) and 'The initials here will be used to log into the app for this staff member' (pointing to the 'Initials' field). A third callout at the bottom explains that the alternative options are only necessary if you do not want reminders sent to the cell phone and email for this staff member. The bottom of the dialog has 'OK', 'Cancel', and 'Help' buttons.

2 App Login

TXDocs login

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

<https://app.txdocs.com>

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

Login

Firm ID

TX140

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

Initials

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

Password

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

TXDocs Support

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

Sign In

Enter your TXDocs firm ID here

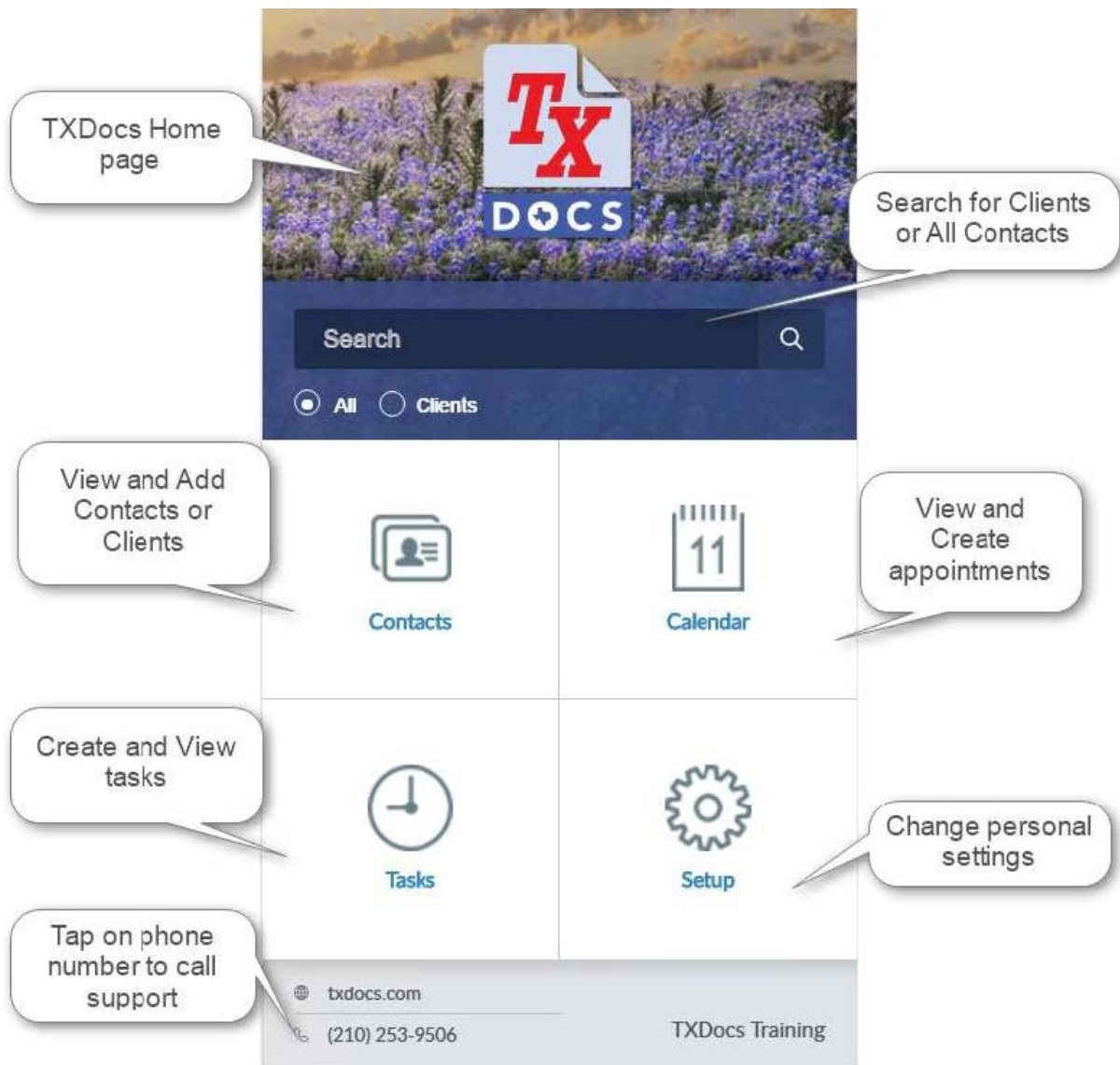
Enter your TXdocs login initials here


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

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

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

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



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

2.1 App Setup

Setup

The screenshot shows the 'Setup' screen of an application. The top navigation bar is dark blue with a home icon on the left and a back arrow on the right. The title 'Setup' is centered in the bar. Below the bar, the 'Preferences' section is visible, containing several input fields and a save button. Callouts provide explanations for each field:

- Home page:** Points to the home icon in the top bar.
- Save preferences:** Points to the save icon in the top bar.
- Previous page:** Points to the back arrow in the top bar.
- You can choose your default appt. duration:** Points to the 'Appointment Default Duration' dropdown menu, which is currently set to '60 minutes'.
- You can choose either Text or Email as your default reminder:** Points to the 'Default reminder Method' dropdown menu, which is currently set to 'Text'.
- This time will be the time where your calendar starts each day:** Points to the 'Workday starts at' input field, which is set to '7 : 00 AM'.
- This will be the time that your calendar ends each day:** Points to the 'Workday ends at' input field, which is set to '5 : 00 PM'.
- Your Email you want reminders sent to:** Points to the 'Email' input field, which contains 'support@txdocs.com'.
- Your phone number where you want Text reminders sent:** Points to the 'Mobile Phone' input field, which contains '210-253-9506'.
- Select to start Email to TXDocs Support:** Points to the 'Email Support' radio button.
- Select to call TXDocs Support:** Points to the 'Call Support' radio button.

The 'TXDocs Support' section at the bottom has two radio buttons: 'Call Support' and 'Email Support'.

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

The screenshot shows the TXDocs Plus app login screen. It includes fields for 'Workday starts at' (7:00 AM), 'Workday ends at' (5:00 PM), 'Email' (support@txdocs.com), and 'Mobile Phone' (210-253-9506). Below these are 'Call Support' and 'Email Support' buttons. At the bottom, there are 'Cancel' and 'Save' buttons, followed by a red bar containing 'Logout', 'Refresh data', 'Clear local cache', and 'Send debug log' buttons. Callouts provide instructions for each of these bottom buttons.

Workday starts at
7 : 00 AM

Workday ends at
5 : 00 PM

✉ Email
support@txdocs.com

📞 Mobile Phone
210-253-9506

TXDocs Support

📞 Call Support ✉ Email Support

Cancel changes ✖ Cancel 💾 Save Save changes

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

Logout

Refresh data

Clear local cache

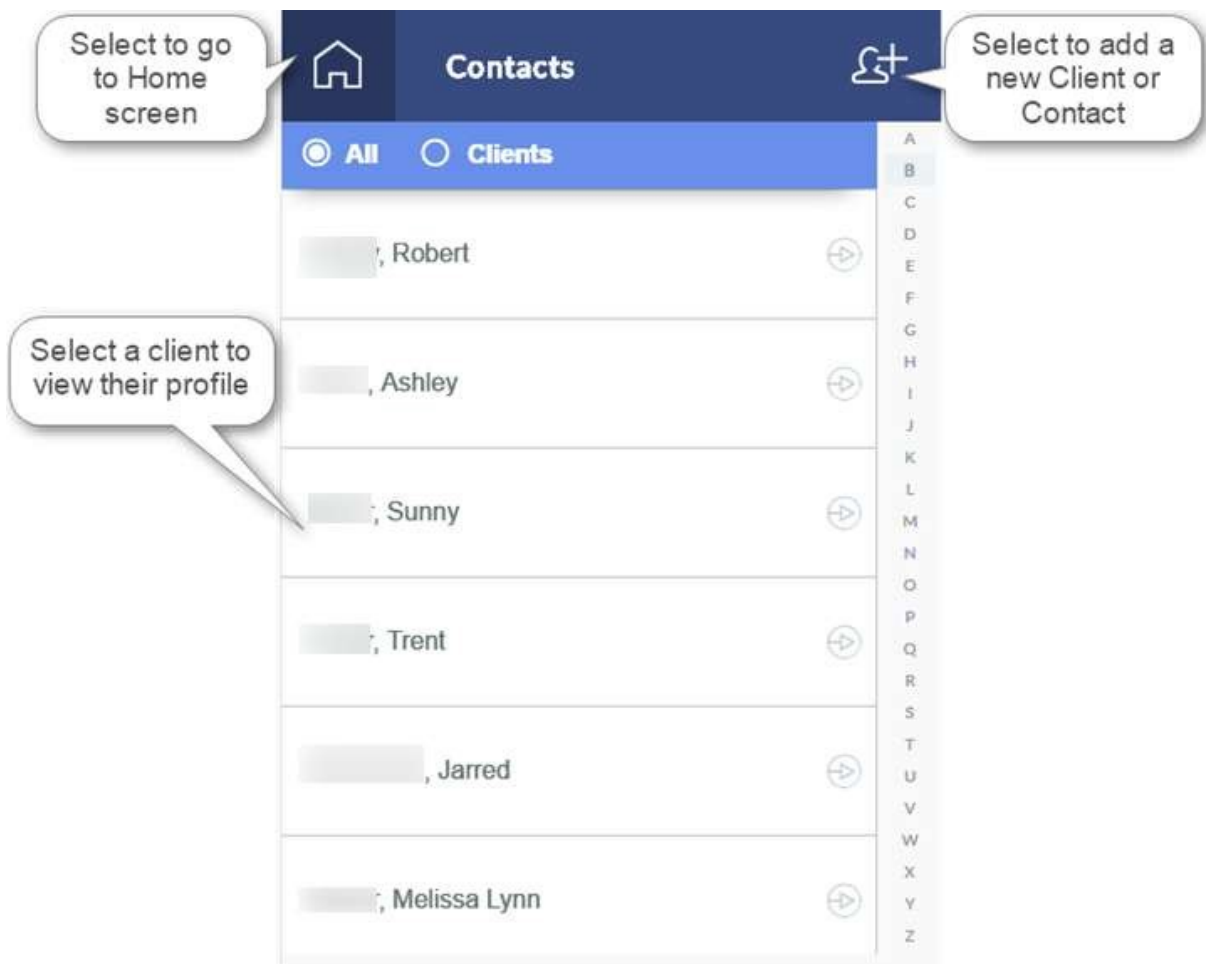
Send debug log

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

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

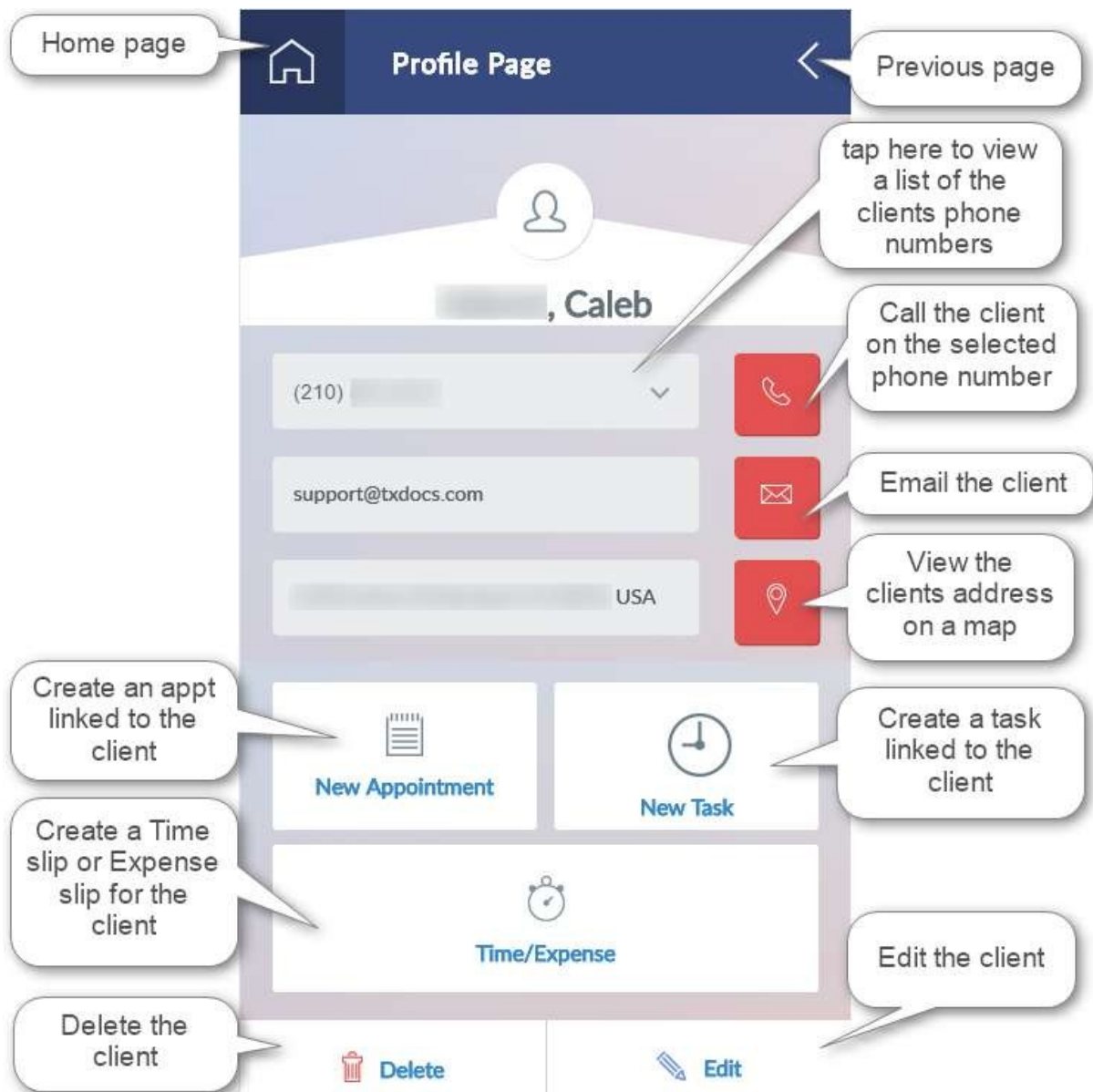
2.2 App Contacts

Contacts Home



- You can tap on a letter in the column on the right side of the screen to jump to clients or contacts whose last name begins with the corresponding letter.

[View Contact](#)



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

Edit Contact

Edit Contact



☐ Business


☒ Client

Surname

First name

Addresses



 

 Click to add 2nd address

Phone numbers

(000) 435 8249

Email addresses

 Cancel  Save

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

2.3 Tasks and Appointments

Calendar Home



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

[Add appointments](#)

The screenshot shows the 'Add Appointment' screen of an application. The screen is divided into several sections: 'Date & Time', 'Description', 'Search client:', 'Reminder', and 'Optional Note'. Callouts provide instructions for each section.

Home page: Points to the home icon in the top left corner.

Select either of these to change the start and end time of an appointment: Points to the 'Starts' and 'Ends' fields in the 'Date & Time' section.

Appt description must be entered to allow saving of the appt.: Points to the 'Appointment Description' field in the 'Description' section.

Search client:: Points to the 'Search client:' label and the 'Search term' input field.

Optional: assign appt. to a client: Points to the client selection icon next to the 'Search term' field.

set a reminder for an appt. via Text or Email. You can customize the time beforehand at which you are reminded.: Points to the 'Reminder' section, specifically the 'Text' dropdown and the '15' value.

+ Add a Reminder: Points to the '+ Add a Reminder' link in the 'Reminder' section.

You can choose up to two reminders, one of each if you desire: Points to the '+ Add a Reminder' link.

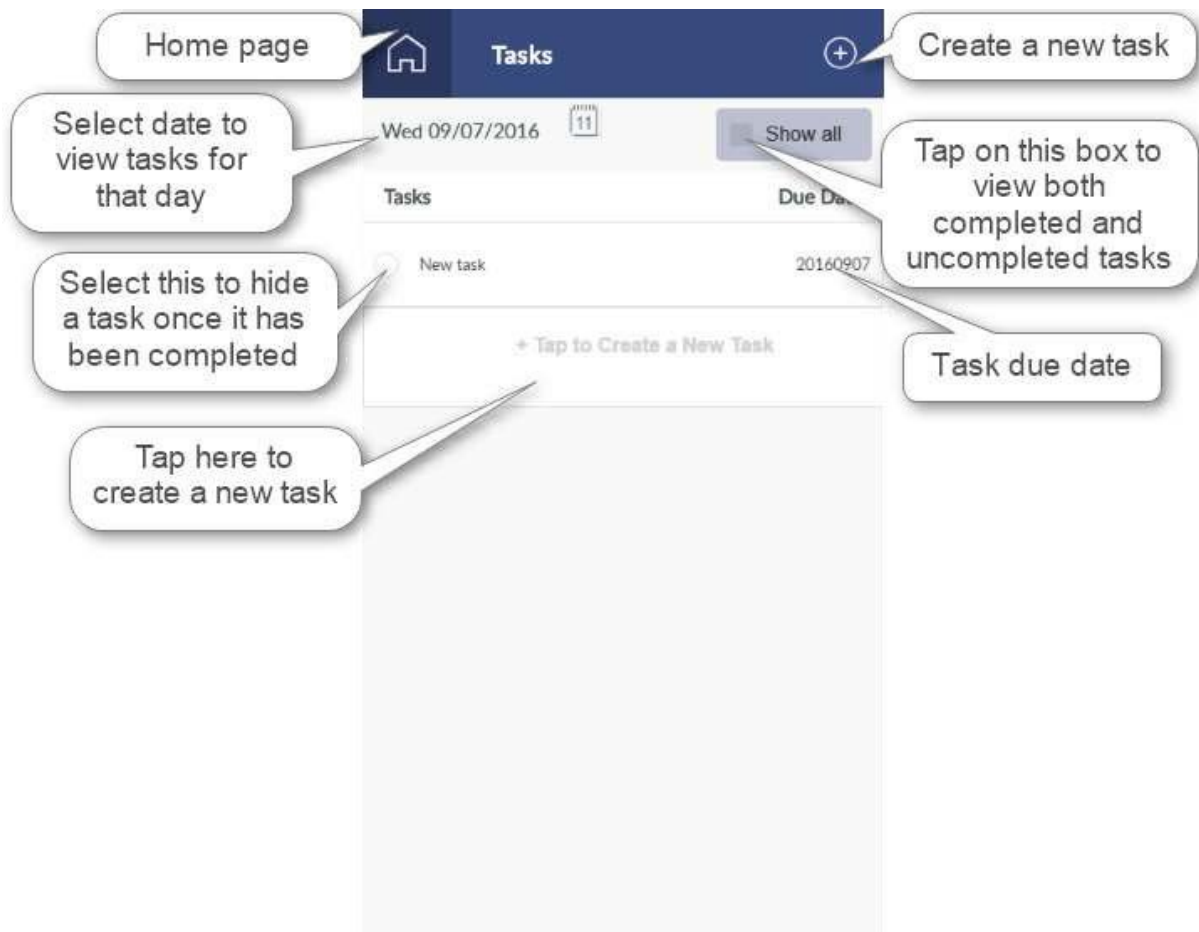
Cancel Appointment: Points to the 'Cancel' button at the bottom left.

Save Appointment: Points to the 'Save Appointment' button at the top right.

Previous page: Points to the back arrow in the top left corner.

Save Appointment: Points to the 'Save Appointment' button at the bottom right.

Tasks Home



Add tasks

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

Home page

Save task

Select the date for the task

Due Date

09/02/2016

11

Subject

Search client:

Search term

Enter a subject for the task (Must be done)

Link a client to the task. (Optional)

Cancel task

Cancel

Save

Save task

2.4 TimeSlips & Expense Slips

Create Time slip/ Expense slip

The screenshot displays the 'Create Time slip/ Expense slip' form in the TXDocs mobile app. The form is divided into two tabs: 'Time slip' (selected) and 'Expense slip'. The 'Time slip' tab contains the following fields and actions:

- Home page:** A home icon in the top left corner.
- Choose time or expense slip:** A toggle switch between 'Time slip' and 'Expense slip'.
- Choose the date for the slip:** A date picker showing '09/07/2016'.
- Client:** A dropdown menu showing 'Caleb'.
- Select case:** A dropdown menu showing 'divorce'.
- Remove client from slip:** A red button with a minus sign.
- Select the clients case:** A checkmark icon.
- Save:** A red button with a plus sign in the top right corner.
- Previous page:** A back arrow in the top left corner.

The 'Expense slip' tab contains the following fields and actions:

- Select an option that suits your case:** Radio buttons for 'Hourly', 'Fixed rate', and 'Pro bono'.
- Select the amount of time spent if applicable:** A dropdown menu showing '00' hours.
- Select the rate you want to charge for this case:** A dropdown menu showing '15' minutes.
- Save slip:** A red button with a plus sign in the bottom right corner.
- Cancel the slip:** A red button with a minus sign in the bottom left corner.

The form also includes a 'Description' field with the placeholder text 'Extra details about the time spent.' and a 'Total' field showing '\$ 125.00'.

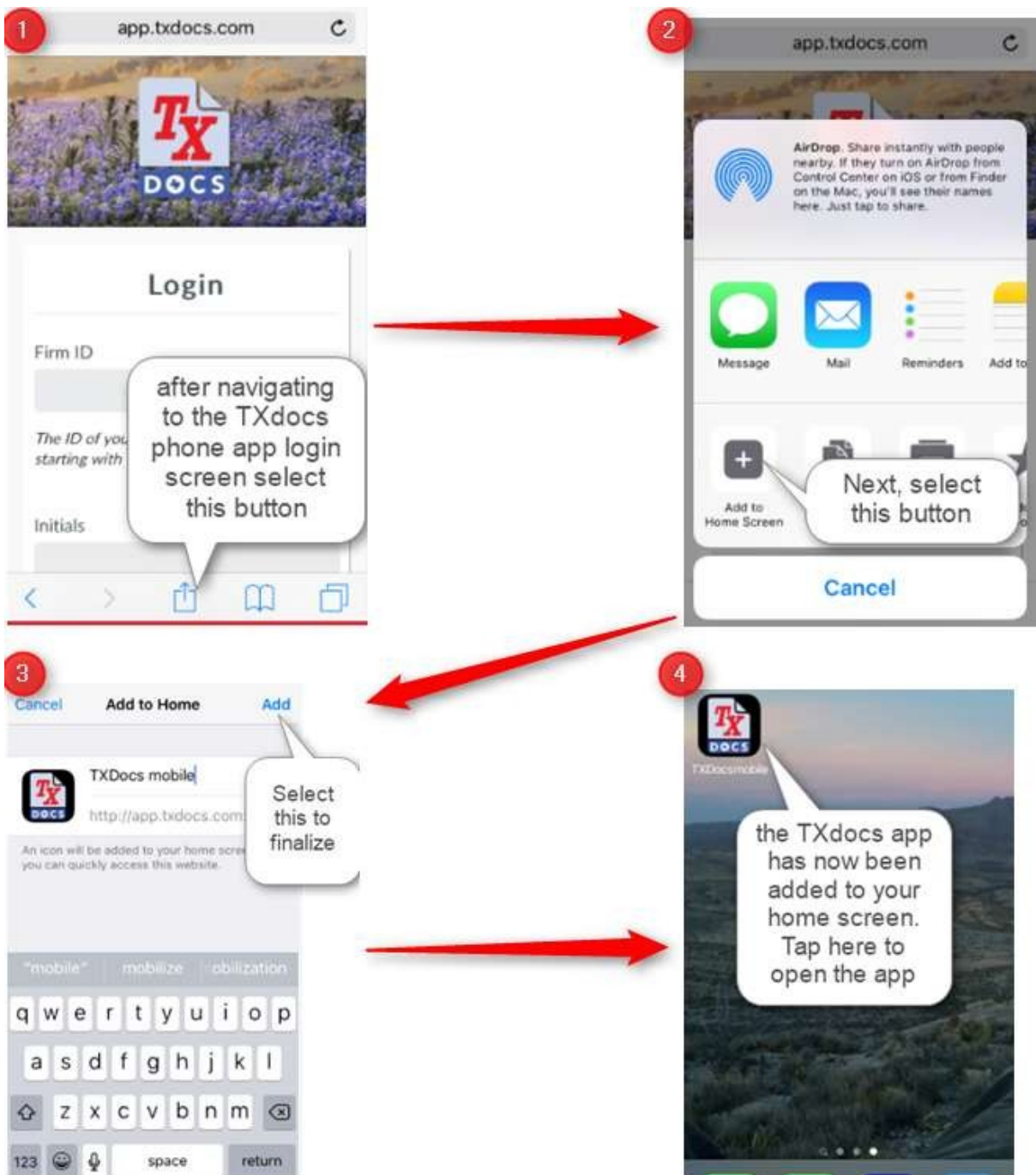
-Time slips and Expense slips can only be created with the phone app, they can only be viewed through your TXDocs Anywhere account.

3 Home Screen Setup

iPhone-Adding TXDocs app to home screen

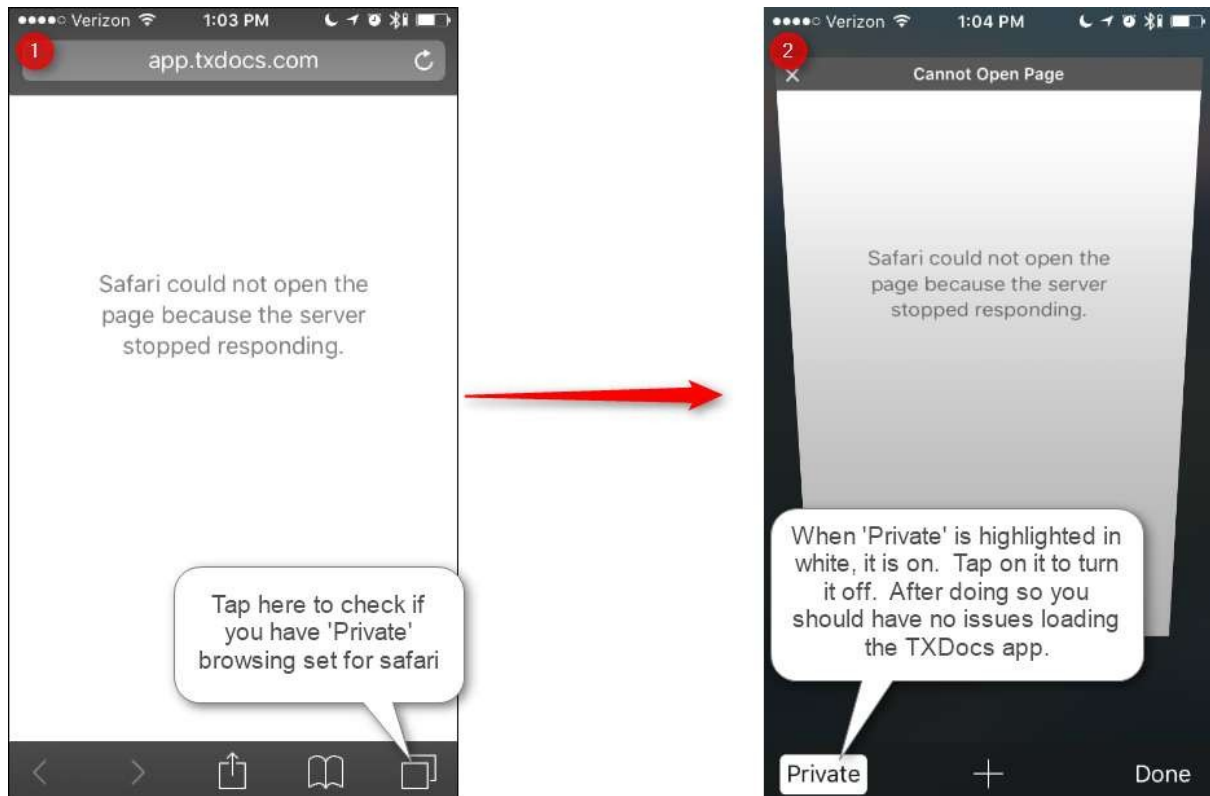
Adding the TXDocs app to your home screen will save you time make it easier for you to access the app and will save you time. You will also stay logged into the app until you manually log out.

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



Turn off Private browsing in Safari

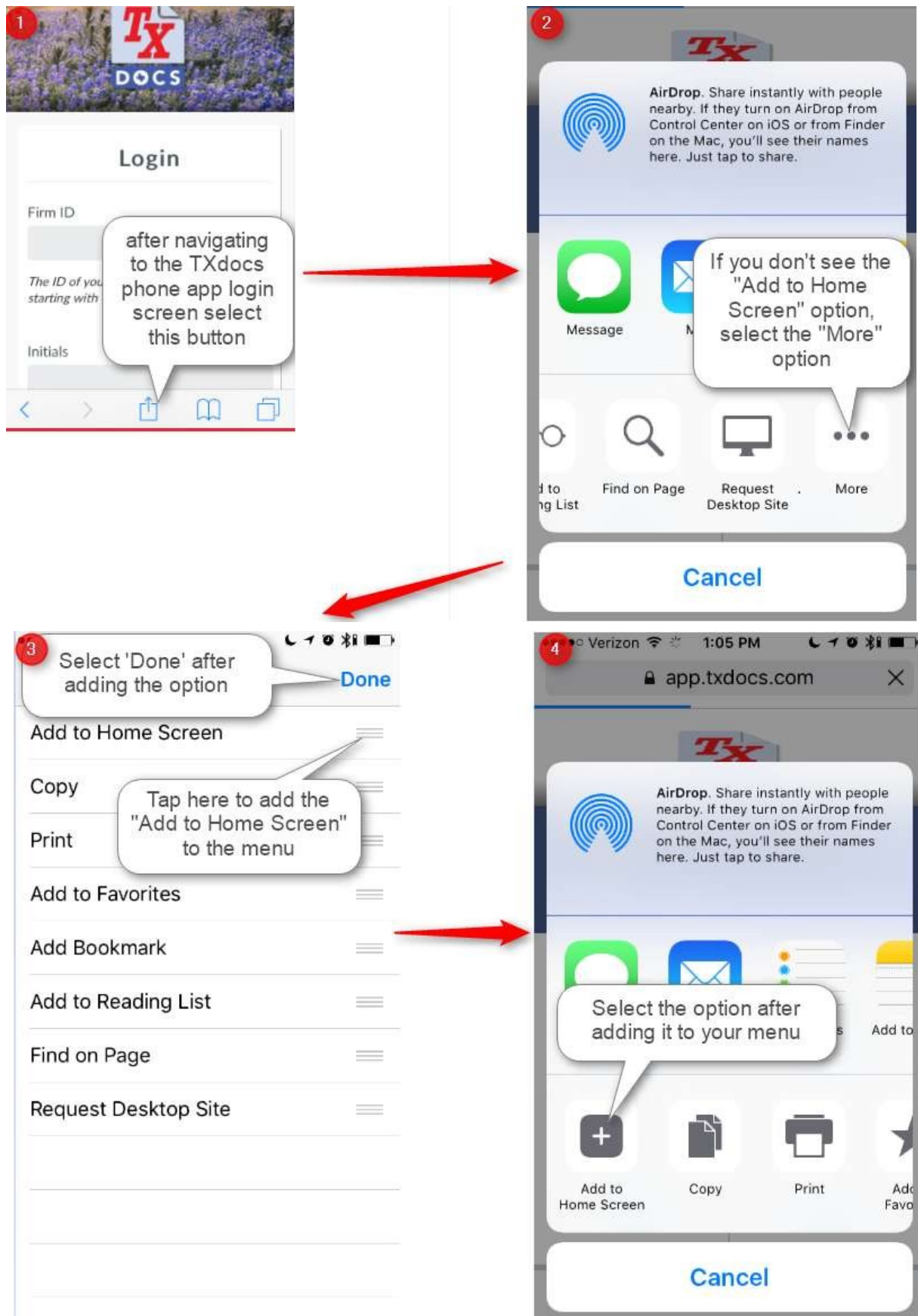
Start by opening Safari and then follow the instructions in the images below to turn off 'Private' browsing.



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

iPhone- Add to Home Screen option

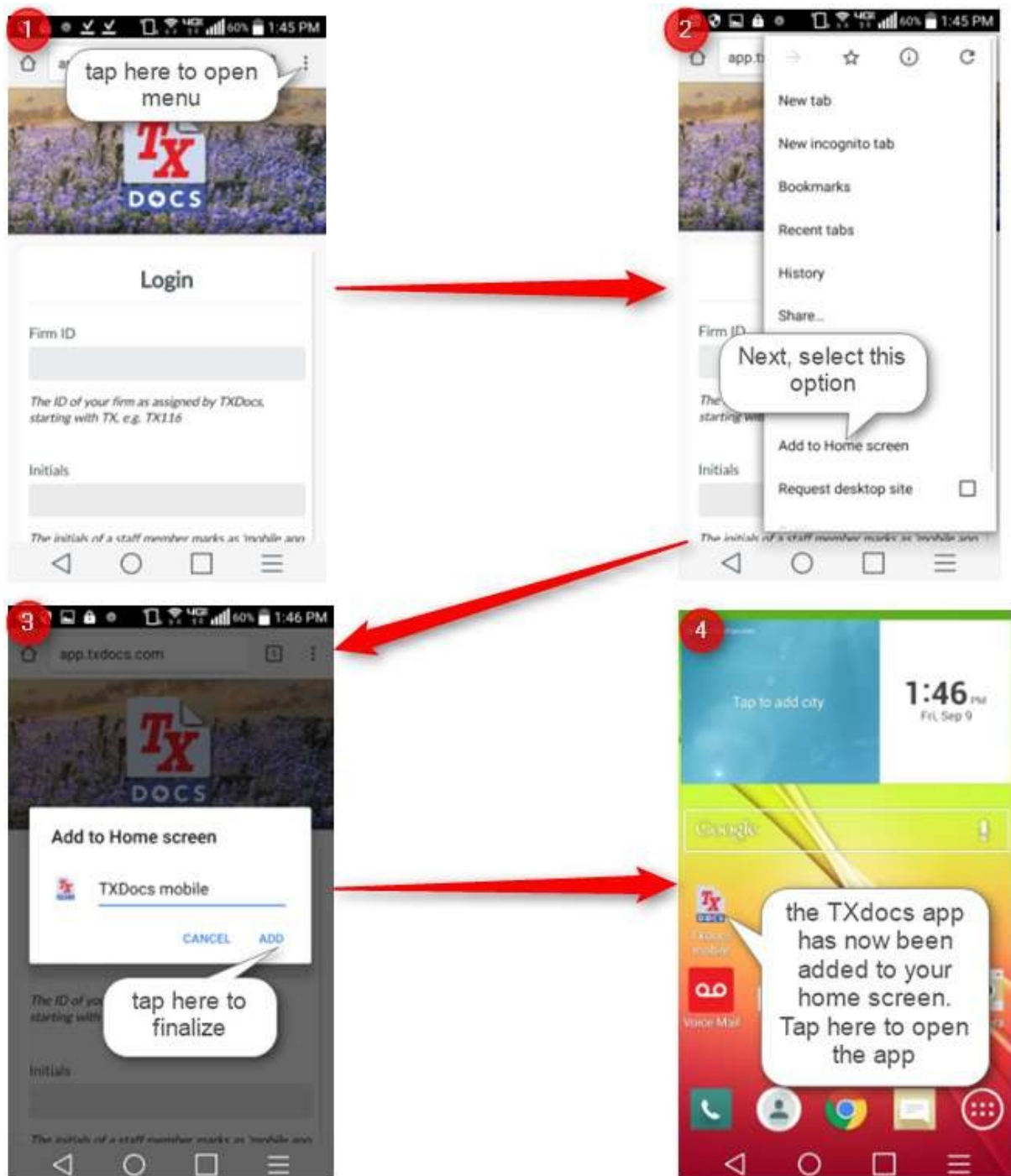
Follow the instructions in the images below to find the option for adding the TXDocs app to your home screen.



Android- Adding TXDocs app to home screen

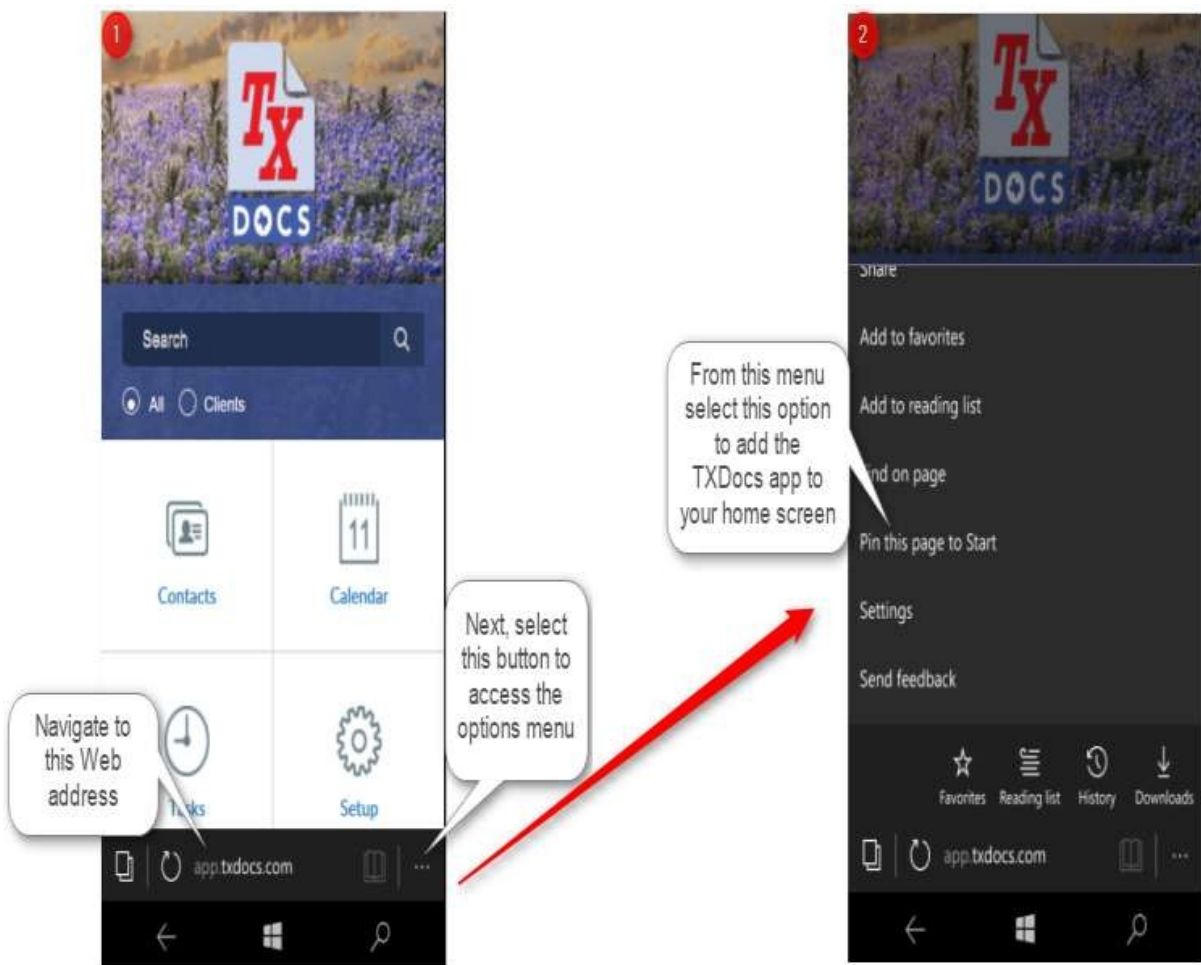
Adding the TXDocs app to your home screen will save you time make it easier for you to access the app and will save you time. You will also stay logged into the app until you manually log out.

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



Windows- Adding TXDocs app to home screen

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



4 FAQs

FAQs

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

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

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

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

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

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

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

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

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

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

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

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