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.

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

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

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
Add tasks

- Home page
- Select the date for the task
- Save task
- Previous page
- Enter a subject for the task (Must be done)
- Link a client to the task (Optional)
- Cancel task
- Save task

Due Date: 09/02/2016
Subject:
Search client:
Search term:
Description:
This is a task that needs to be done
2.4 TimeSlips & Expense Slips

Create Time slip/ Expense slip

-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 be 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.
Home Screen Setup

1. After navigating to the TXdocs phone app login screen, select this button.

2. If you don't see the "Add to Home Screen" option, select the "More" option.

3. Select 'Done' after adding the option.

4. Tap here to add the "Add to Home Screen" to the menu.

Select the option after adding it to your menu.
Home Screen Setup

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.
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.

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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.

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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.

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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.

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

**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.

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**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.