

What's new in Online Intake

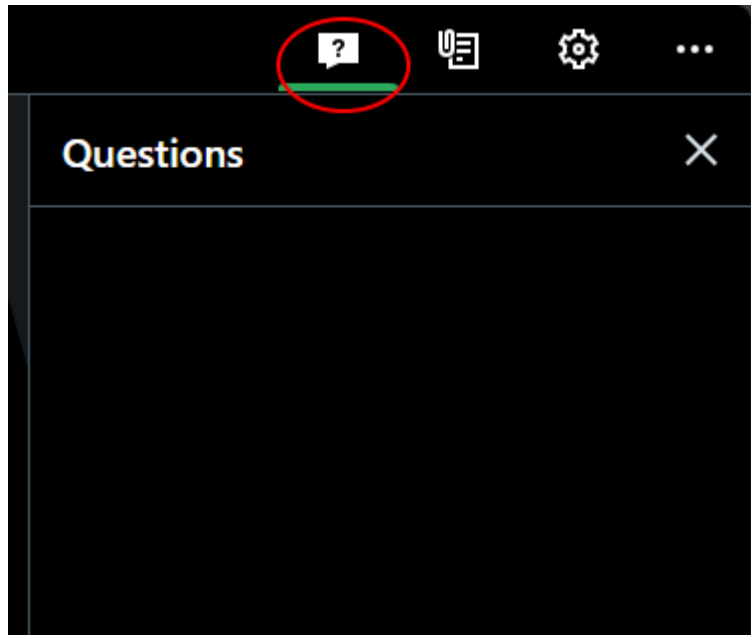
The webinar will start at 12:00pm.

Presented by: Dries Driessen
Chief Operating Officer

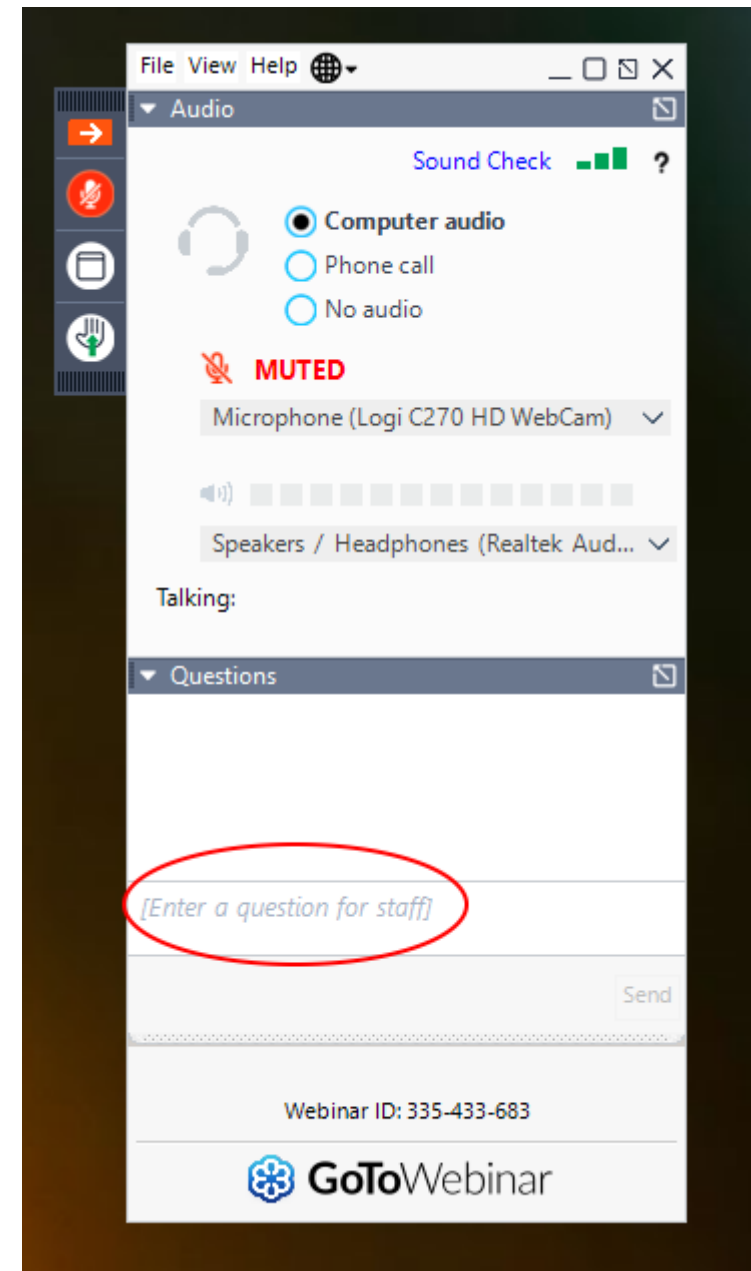
Welcome

- Questions? Please submit them using the questions box
- 1 hour of CLE ethics credit – proof of your attendance will be submitted to the bar. Provided that you've given us your bar number.
- Webinar will be recorded - you will receive an email with a link to the recording.
- A short survey will pop up after the webinar ends.

Web version of GoToMeeting



Desktop version of GoToMeeting



Agenda

- NEW: Online Intake Dashboard
- NEW: Message Center
- NEW: Daily Digest email
- NEW: Archiving questionnaires
- Customizing instructions for your clients
- Customizing the look of your portal
- Troubleshooting
- Q&A

Introducing the dashboard



- Quick overview of statuses
 - Questionnaires not opened yet
 - Questionnaires not completed yet
 - Questionnaires ready to be downloaded
 - Documents to be downloaded
 - Overdue tasks
- Take action
 - Send reminders to your clients about filling out the questionnaire(s)
 - Download questionnaires
 - Download documents
 - Send reminders to your clients about overdue tasks

Send an intake questionnaire to your client

- Default text with placeholders in Firm Settings
- Select the case and pick the questionnaire

Inventories

- Collect data on assets, debts and retirement
- Download and use directly in the inventory tools for Family Law and Probate

Message Center

- Enables your clients to ask questions about the intake forms
- Answer the questions securely in the portal
- On by default, but can be turned off

Document Exchange



- Download the documents your client uploaded for you
 - Available in the case folder
- Upload documents to your client
 - Available from within the Editor
- Request documents using tasks
 - Birth certificate
 - Health insurance details

Daily Digest Email

- A daily email sent around 9:00 am to show you yesterday's activity

Daily Digest: Online Intake activity update



donotreply=txdocs.com@mg.txdocs.com on behalf of Online Intake <donotreply@txdocs.com>
To alan.even@txdocs.com

↩ Reply

↩ Reply All

➡ Forward



Mon 9/29/2025 9:02 AM



TXDOCS

ONLINE INTAKE DAILY DIGEST

Client: Production Propell (ppoll123@mailinator.com)

Case: 20250927_OIRegression

Messaging:

- asked 3 questions about a form

Document Exchange:

- uploaded 1 document

Tasks:

- completed 1 task

All activities are managed from the TXdocs Online Intake dashboard.

If you need assistance, please contact support at [\(210\) 253-9506](tel:2102539506) M - F, 8am - 5pm CST.

This is an automated message. Please do not reply.

Archiving

- Clean up your list of Online Intake clients by archiving them.
- Archived clients can be restored

Customizing instructions for your clients

- Initial popup can be modified to personalize the portal.
- Help for each questionnaire can be customized

Customizing the look of your portal

- Upload your logo
- Pick the color of the side panel

Troubleshoot common issues

- BCC email address
- Resend welcome email
- Reset password
- Open as user
- Reopen questionnaire

Q&A



- Questions? Please submit them using the questions box of the GoToWebinar side panel.
- TXdocs submits attorney attendance to the Bar.
- GoToWebinar sends an email to prove your attendance.
- You will receive another email with a link to this webinar's recording.
- A short survey will appear at the end of the webinar.
- Please join our webinar on October 15th at noon, about the Family Law Legislative Changes by Judge Longino.
- Thank you for attending. And as always, let us know how we can serve you better!