

TIPS & TRICKS FOR SMARTER DRAFTING

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**CREATE SMARTER FORMS
SAVE HOURS OF DRAFTING**

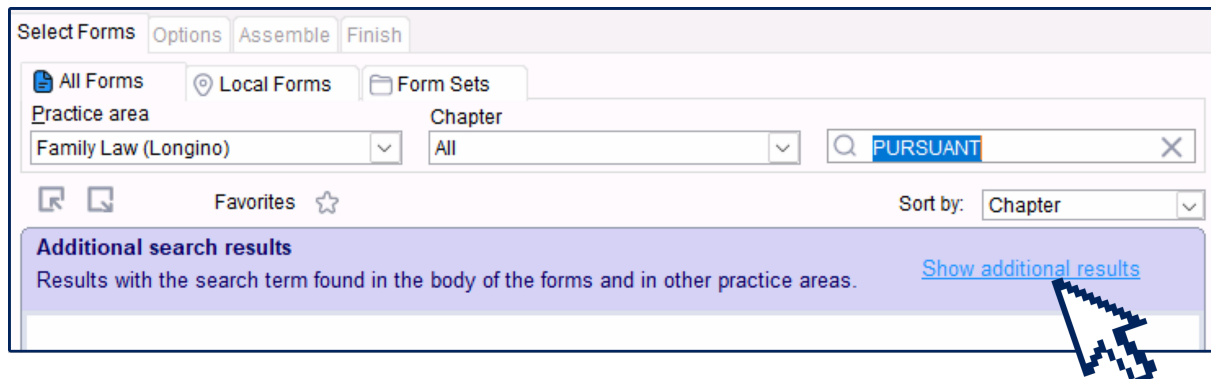


FINDING FORMS

1 FINDING FORMS

ADVANCED KEYWORD SEARCH

☆ **In addition to using the keyword search, you may find more matches with Show Additional Results.** TXdocs will display a list of forms that include your search term anywhere in both the title and the body text of all available forms-- including forms from other practice areas.

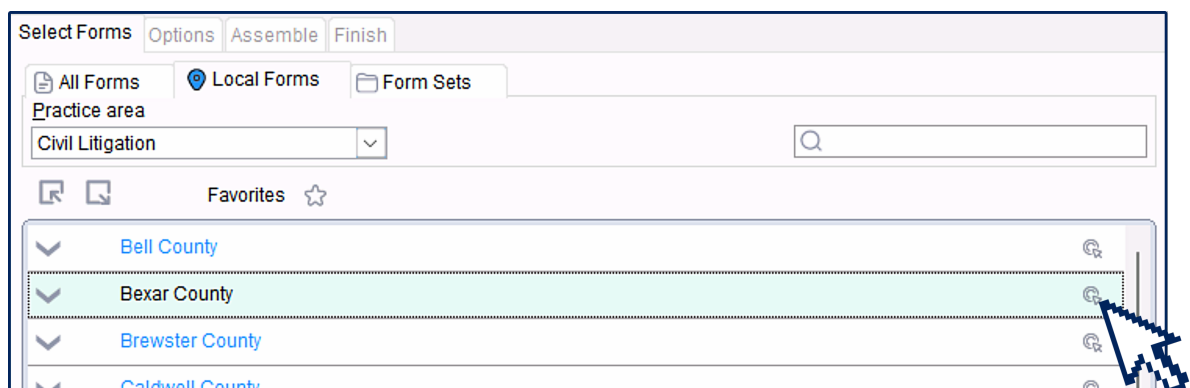


☆ **Use the Sort by drop-down menu to display your search results alphabetically, or by relevance.**

FIND & ASSEMBLE LOCAL FORMS

☆ **Select the Local Forms tab to find and assemble forms that are specific to all 254 Texas counties.** Type a county name into the keyword search bar to find templates that comply with local rules and regulations.

☆ **Set your county as your default county to speed up your searches.** Click the icon to the right of your desired county to make it default to the top of the list.



CREATING FORM SETS

☆ **Group commonly bundled forms into a Form Set.** Check the boxes next to each desired form, as if you were about to assemble them, and click the Create Form Set button. Name your new Form Set, then click OK.

☆ **Access your custom Form Sets using the Form Sets tab.**

**CREATE SMARTER FORMS
SAVE HOURS OF DRAFTING**



DOCUMENT ASSEMBLY

2 DOCUMENT ASSEMBLY

COPY/PASTING TEXT INTO FIELDS

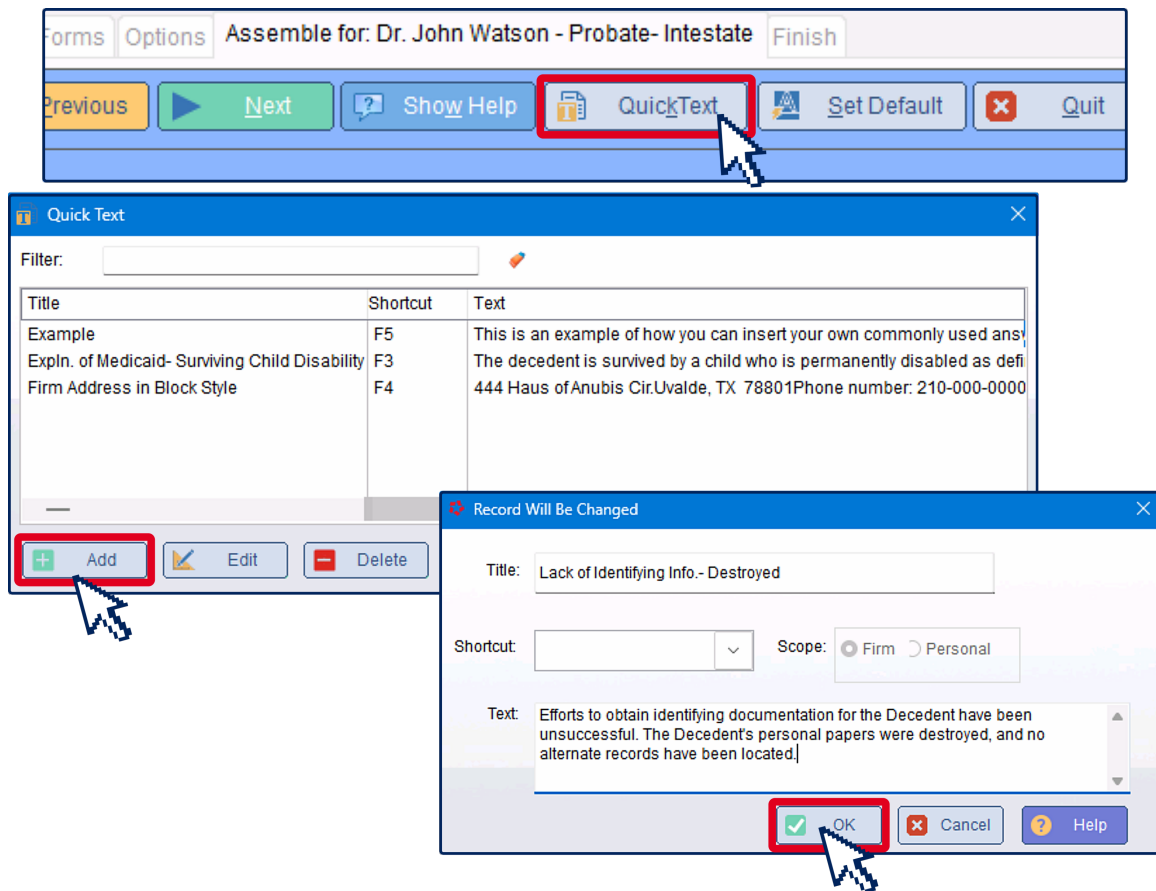
- ☆ **Copy/paste answers into your assembly with keyboard shortcuts.** For Windows, use Ctrl + C to copy and Ctrl + V to paste. For Mac OS, use (Left) Command + C to copy, and (Left) Command + V to paste.

SETTING DEFAULT ANSWERS

- ☆ **Skip repetitive questions by setting default answers.** Answer a field, then click Set Default button from the top menu. Now this field will be auto-filled in future assemblies.
NOTE: Default answers will not override existing answers.

USING QUICK TEXT

- ☆ **Create Quick Text to quickly insert your language into assembly fields.** *Quick Text*> *Add*. Name your Quick Text, then type or copy/paste your text in the box. Choose to make the text available to all staff, or just yourself.



- ☆ **To apply Quick text, click the desired assembly field> Quick Text> Double-click your text from the list.** Use the keyword filter to search your Quick Texts if you have a large library.

TOGGLING SIGNATURE SETTINGS

- ☆ **Upload your custom signature or use a text signature.** Toggle your settings by selecting *Settings > Firm Settings > Manage Staff > Highlight your name > Edit*. On panel 3 of 3 drag and drop an image file, or select the text signature option under Type of Digital Signature.
- ☆ **Auto-sign your documents by changing your signature settings.** In the same window as the previous tip, enable either Ask during assembly or Always in the Let TXdocs Automatically Digitally Sign Your Assembled Documents box. One of these must be selected to upload images.

The screenshot shows a dialog box titled "Staff Information Will Be Changed" with a close button (X) in the top right corner. The main content area has a header: "You can have TXdocs automatically insert your signature into documents." Below this is a section titled "Let TXdocs automatically digitally sign your assembled documents" with three radio button options: "Ask during assembly" (selected), "Always", and "Never". A blue callout box points to these options with the text "Toggle your signature settings to Ask or Always".

Below the first section is the "Type of digital signature" section with two radio button options: "Text" and "Image" (selected). Under "Image", there is a text field for "Image file:" containing "Online Signature Example-". To the right is a "Select Signature" button with a folder icon. Below the text field are two spinners for "Width:" (set to 4.00) and "Height:" (set to 1.67), both followed by "inches". A blue callout box points to this area with the text "Upload your signature here".

In the center of the "Image" section is a preview of a handwritten signature that reads "My Signature". To the right of the preview are the "Recommended image settings:" (Height: 0.4-1.5 inches, Width: 1.5 - 4 inches) and "Compatible file types:" (.png, .jpg, .bmp, .gif, .jpeg).

At the bottom of the dialog box, there is a status bar with "3 out of 3" in a green box. Below that are five buttons: "Training Video" (with a video icon), "Previous" (with a left arrow), "Save" (with a checkmark), "Cancel" (with a red X), and "Help" (with a question mark).

**CREATE SMARTER FORMS
SAVE HOURS OF DRAFTING**



RESUMING WORK

3 RESUMING WORK

KNOW YOUR SAVE & QUIT OPTIONS

☆Resume incomplete assembly progress by saving your answers before you quit the session. Select Quit to view the four options:

- **Restart at First Question:** restarts at first panel; answered questions stay filled.
- **Quit Without Saving:**
- **Quit and Save Answers:**
- **Cancel- Continue Assembling:**

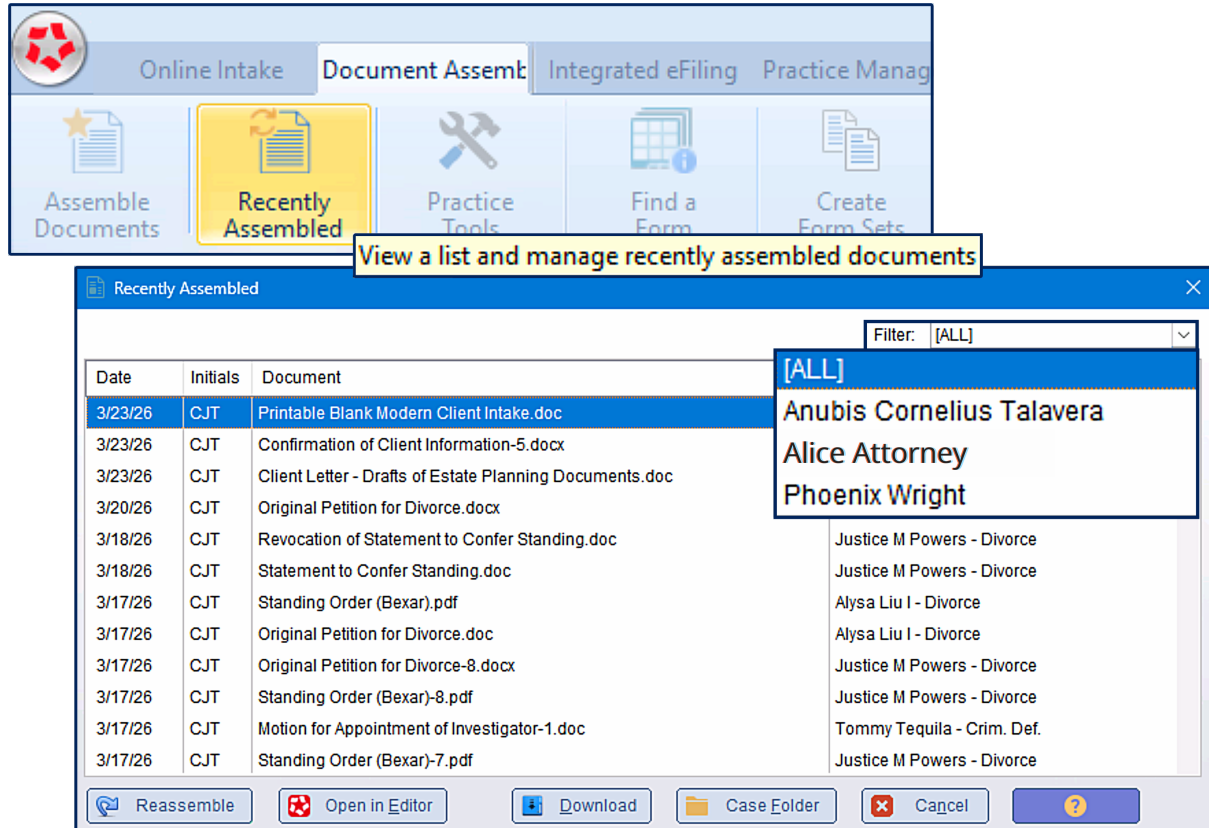
REASSEMBLE OR RESUME DOCUMENTS

☆Redo past assemblies, or pick up where you left off with Reassemble Documents. *Document Assembly > Reassemble Documents*. Select forms that were either incomplete, or forms were completed but need revisions. Click Next to start assembling.

The screenshot displays the 'Document Automation' interface. At the top left, there is a header 'Document Automation' with an information icon. Below this, there are four main sections: 'Online Intake', 'Document Assembly', 'Integrated eFiling', and 'Reassemble Documents'. The 'Document Assembly' section is highlighted with a blue box and a circled '1'. It contains an icon of a document with arrows and the text 'Access thousands of Texas-specific forms covering 13 practice areas.' To the right of this section, there is a blue callout box with the text 'Finish incomplete sessions, or redo existing forms'. Below the callout box, there are three icons: 'Assemble New Documents' (a star and document icon), 'Reassemble Documents' (a circular arrow and document icon, highlighted with a blue box and a circled '2'), and 'Practice Tools' (a wrench and document icon). The 'Integrated eFiling' section is partially visible at the bottom left.

VIEW RECENTLY ASSEMBLED FORMS

☆View all your firm's recently completed documents. Document Assembly tab from the top menu > Recently Assembled.



☆Filter the list by staff member. Use the Filter drop-down menu to select one or all staff members.

**CREATE SMARTER FORMS
SAVE HOURS OF DRAFTING**



TXDOCS EDITOR

4 TXDOCS EDITOR

EDIT FASTER WITH SMART FIELDS

☆ **Edit documents quickly with Editor's smart Fields.** In TXdocs Editor, click a blue highlighted field, type your edit in the TXdocs Navigation Panel, then press the Tab key to apply changes. Click Save Document when finished. All fields of the same type will update across the entire case. Other related case documents opened in Editor will update in real-time.

The screenshot shows the TXDOCS Editor interface. The document title is "Justice Powers - Divorce" and the file name is "Order in SAPCR to Prevent International Child Abduction.doc *". The main document content includes a case number "CAUSE NO. ZZ-1389-2025" and a table with the following structure:

IN THE INTEREST OF	§	IN THE DISTRICT COURT
	§	
JUSTINE POWERS, GARRISON POWERS, AND SALLY POWERS,	§	JUDICIAL DISTRICT
	§	
CHILDREN	§	MIDLAND COUNTY, TEXAS

Below the table is the text: "ORDER IN SUIT AFFECTING PARENT-CHILD RELATIONSHIP TO PREVENT INTERNATIONAL ABDUCTION BY PARENT" and "Justice M. Powers's Original Petition in Suit Affecting Parent-Child Relationship to Prevent International Child Abduction by Parent was heard by this Court on April 14th, 2026." A blue hand icon points to the "MIDLAND COUNTY, TEXAS" field.

The "TXdocs Navigation" panel on the right shows the field "County name" with the value "Bexar". Below the field is a blue button labeled "Bexar" and a description: "In which your comments get into the caption/style in all capital letters automatically." Below this is an example: "Example: Tarrant". At the bottom of the panel are "Previous" and "Next" buttons.

A zoomed-in view of the table below shows the updated state where the county name has changed to "BEXAR COUNTY, TEXAS":

JUSTINE POWERS, GARRISON POWERS, AND SALLY POWERS,	§	JUDICIAL DISTRICT
	§	
CHILDREN	§	BEXAR COUNTY, TEXAS

○ DID YOU KNOW?

TXdocs will align headers with paragraph text so sections always stay together. Page breaks will not separate paragraph/section headers from the body text for better readability and consistent formatting.

TXdocs auto-renumbers paragraphs, clauses, and ordered lists.

**CREATE SMARTER FORMS
SAVE HOURS OF DRAFTING**



FORMAT WIZARD

5 FORMAT WIZARD

○ DID YOU KNOW?

Changes in Format Wizard apply firm-wide to all future documents. Apply style settings once, let your documents format themselves.

★ APPLY STYLE PRESETS

★ **Customize your document formatting with Style Presets.** Try out a Modern or Traditional style preset using Format Wizard, then modify details like font, margins, footers, and more. *Settings > Format Wizard > Style Presets.*

The screenshot shows the 'Format Wizard' window in the TXdocs Editor. It features a 'Style Presets' section with two options: 'Modern Style Preset' and 'Traditional Style Preset'. The Modern preset is described as following recommendations from Matthew Butterick's 'Typography for Lawyers', with settings like Open Sans font and 12pt size. The Traditional preset uses Times New Roman font and 12pt size. Below these are font settings for all document types, currently set to Times New Roman, 12pt. At the bottom, there are preview buttons for Pleading, Agreement, and Letter. To the right, two document preview examples are shown, one for the Modern preset and one for the Traditional preset, both featuring a case caption and a subheading.

Modern Preset

NOTICE: THIS DOCUMENT CONTAINS SENSITIVE DATA.

CAUSE NO. 949 CI 2017

IN THE MATTER OF THE MARRIAGE OF	§	IN THE DISTRICT COURT
	§	
JOHN DOE	§	289TH JUDICIAL DISTRICT
AND	§	
JANE DOE	§	BEXAR COUNTY, TEXAS

SAMPLE FORMATTING TITLE

Subheading

This section is an example of the Body style set in Format Wizard under Pleadings & Orders. Anything with a caption showing the style of case falls under this category.

You can set your own justification, indentation rules, and line spacing for the Body of your

Traditional Preset

NOTICE: THIS DOCUMENT CONTAINS SENSITIVE DATA.

CAUSE NO. 949 CI 2017

IN THE MATTER OF THE MARRIAGE OF	§	IN THE DISTRICT COURT
	§	
JOHN DOE	§	289TH JUDICIAL DISTRICT
AND	§	
JANE DOE	§	BEXAR COUNTY, TEXAS

SAMPLE FORMATTING TITLE

Subheading

This section is an example of the Body style set in Format Wizard under Pleadings & Orders. Anything with a caption showing the style of case falls under this category.

You can set your own justification, indentation rules, and line spacing for the Body of your

★ **Preview your customizations before saving.** Use the Preview [document] buttons to view a sample of your changes. Always save your work when finished making changes.

FORMAT DOCUMENTS BY TYPE

☆ **Customize formatting styles for different document types.** Formatting preferences can be set for three documents types, or for specific forms (*Settings > Format Wizard > Select a document type*):

- Pleadings & Orders
- Agreements & Contracts
- Letters
- Individual Forms

SET UP MULTI-LINE FOOTERS

☆ **Create a multi-line footer that applies instantly to your new documents.** *Settings > Format Wizard > Select a document type > Footers*. Select one of the placement boxes, and add special character inserts to your footer. To add a line to your footer, place your cursor at the end of your text > Enter, then add another insert or your own text. Preview and save your changes.

The screenshot illustrates the 'Footers' configuration panel in the Format Wizard. On the left, a 'Style Presets' sidebar lists various document types, with 'Footers' selected. The main panel is titled 'Footers' and includes settings for font size (10.00), font name (Times New Roman), and font style (Bold, Italicize, Underline). Below these are three text boxes for 'Left aligned', 'Centered', and 'Right aligned' footers, each containing special character inserts like ~initials~, ~date2~, ~clientname~, ~causenumber~, ~page#~ of ~totalPages~, and ~title~. A 'Click to insert a special character into the footer' section contains buttons for Page#, Today (3/25/26), Your initials, Form title, Cause Number, Total pages, Today (March 25, 2026), Your name, Client Name, Case Description, Attorney Name, and Attorney Initials. A 'Preview Pleading' button is at the bottom. A 'Save and close' button with a green checkmark is shown at the bottom right. A 'Preview' window shows the resulting footer in a document, with a note: 'DECREED will always be uppercase, but you can control whether they are bold or not.' The preview shows fields for CJT, [Client Name], [Cause Number], 1 of 2, and [Form Title].

Use the placement boxes to customize your footer layout

Use calculated inserts to add information

Preview your changes, then save your work when finished

Save and close

ADD YOUR CUSTOM LETTERHEAD

☆ **Create stunning letters by adding your own logo, design, or text with a custom letterhead.** Use the Letterhead Editor to customize a text file, or upload an image to instantly apply it to every letter you draft. *Format Wizard> Letters> Letterhead.*

CAPTION ALIGNMENT

☆ **Align your pleading captions either to the left or the right.** *Settings> Format Wizard> Pleadings & Orders> Caption.*

NOTICE: THIS DOCUMENT CONTAINS SENSITIVE DATA.	
CAUSE NO. 949 CI 2017	
IN THE MATTER OF THE MARRIAGE OF	§ IN THE DISTRICT COURT
	§
	§
JOHN DOE	§ 289TH JUDICIAL DISTRICT
AND	§
JANE DOE	§ BEXAR COUNTY, TEXAS

Left Alignment

NOTICE: THIS DOCUMENT CONTAINS SENSITIVE DATA.	
CAUSE NO. 949 CI 2017	
IN THE MATTER OF THE MARRIAGE OF	§ IN THE DISTRICT COURT
	§
	§
JOHN DOE	§ 289TH JUDICIAL DISTRICT
AND	§
JANE DOE	§ BEXAR COUNTY, TEXAS

Right Alignment

**CREATE SMARTER FORMS
SAVE HOURS OF DRAFTING**

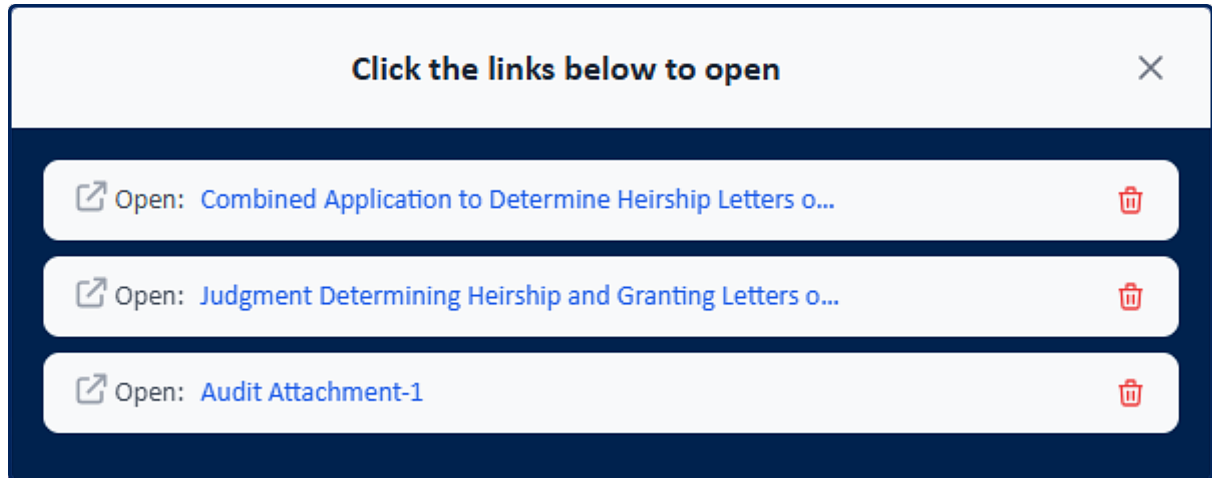


DOWNLOADING & UPLOADING FILES

6 DOWNLOADING & UPLOADING FILES

DOWNLOADING FILES

☆Click the links in the pop-up menu to download documents.



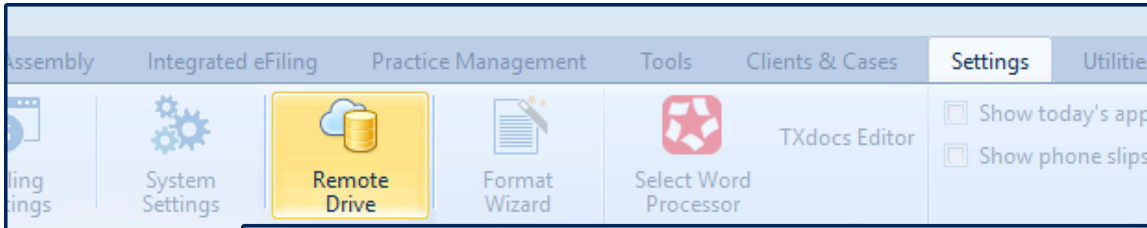
UPLOADING FILES

☆**Drag and drop your computer files to your client's case folder in TXdocs.** Keep your work organized; store your client's documents in one place, and eFile them directly through TXdocs.

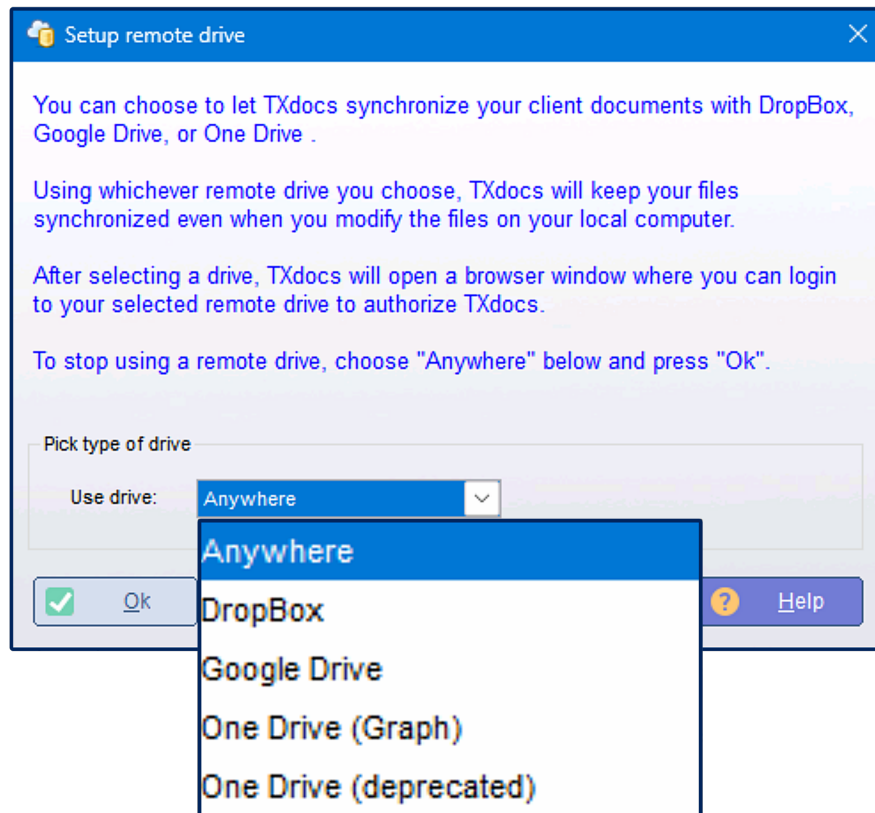
- If using **TXdocs Standard**, *Clients & Cases > Client Documents*.
- If using **TXdocsPlus**, *Practice Management > Case Manager > Activities > Documents*.
- Select a case, then drag & drop files into the folder.

SETTING UP A REMOTE DRIVE

☆ Let TXdocs synchronize your client documents with DropBox, Google Drive, or One Drive. Keep your client files and case answers synced at all times. To connect a remote drive, go to *Settings > Remote Drive*. Use the drop-down menu to select which drive to use. Contact TXdocs Support (210) 253-9506 for assistance.



Configure TXdocs to work with a remote drive like Dropbox, Google Drive or One Drive



**CREATE SMARTER FORMS
SAVE HOURS OF DRAFTING**

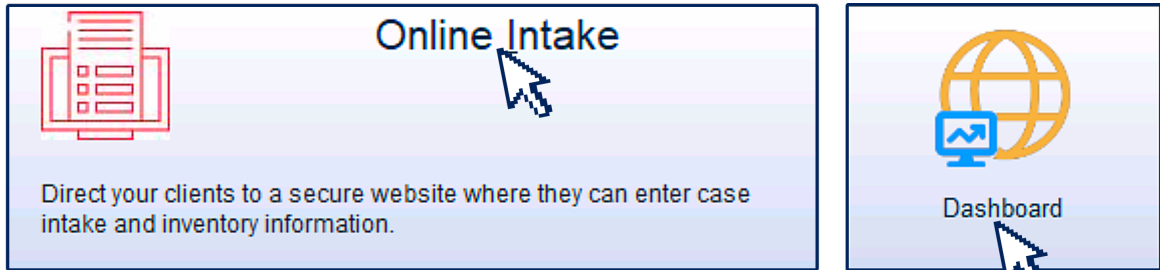


ONLINE INTAKE

7 ONLINE INTAKE

CHECK YOUR DASHBOARD FOR INTAKE UPDATES

★ **Monitor your client's intake progress with your Online Intake Dashboard.** *Online Intake > Dashboard.*



Online Intake Manager Filter clients from prospects

Period: Last 30 Days Type: All

Items from: 02/23/2026 - 03/25/2026

 Questionnaires available for download 2	 Questionnaires incomplete/ not started 3	 Unread messages 0	 Documents from clients 1	 Overdue tasks 4
---	--	---------------------------------	--	-------------------------------

Case	Questionnaire	Date completed	
Margaret Harper - Trust	Trusts - Prospective Client Information	03/25/2026	
Axel Grease - Mechanic's Lien	Mech Liens - Prospective Client Info	03/25/2026	


★ **Display prospects separately from clients on your intake dashboard.** Use the Type drop-down menu to filter clients from prospects.


SEND QUESTIONNAIRE & TASK REMINDERS TO CLIENTS WHO ARE FALLING BEHIND.


★Use your intake dashboard to remind clients of incomplete or overdue questionnaires & tasks. *Online Intake > Dashboard > Questionnaires Incomplete OR Overdue Tasks > Send Reminders*


Period: Last 30 Days ↻ Type: All


Items from: 02/23/2026 - 03/25/2026


 Questionnaires available for download
2



 Questionnaires incomplete/ not started
3



 Unread messages
0



 Documents from clients
1


Overdue tasks
4

	Case	Description	Date
<input checked="" type="checkbox"/>	Tommy Tequila - Crim. Def.	Upload Police Report	03/02/2026
<input checked="" type="checkbox"/>	Anya Forger - Name Change	Upload Photo ID	03/10/2026
<input checked="" type="checkbox"/>	Anya Forger - Name Change	Upload Birth Certificate	03/09/2026
<input type="checkbox"/>	Jeffrey Slambovsky - Real Estate	Send Property Appraisal	02/27/2026

 Send Reminders

 Select all

 Unselect all

Reminder Email

Task Reminder Email

Each item selected will generate an email for your client. Click the buttons below to add variables to the text that will be dynamically replaced based on the client and case the reminder is being sent to.

You can set this default in firm settings.

Dear <CLIENTFULL>,

I hope this message finds you well. As we move forward with your matter, I kindly remind you to <TASKDESCRIPTION> at your earliest convenience.

Completing this task is important to ensure we stay on track and meet all relevant deadlines. Please let me know if you have any questions or need assistance.

Best regards,
<ATTY/NAME>

Client Full Name

Case Name

Attorney Name

Attorney Email

Task Description

Task Due Date

✓ Send Reminders

✗ Cancel

SETTING UP CLIENT PORTALS

☆ **Let clients provide intake info and important documents securely online using the Client Portal.** The Client Portal will be set up when you send your client an intake questionnaire. *Online Intake > Send Questionnaires.*

ODID YOU KNOW?

The Client Portal will also be set up the first time you send a document to a client using Document Exchange.

CUSTOMIZE WELCOME EMAILS

☆ **Personalize your message with a custom welcome email for clients.** Clients receive a welcome email with login help when you first send intake forms. Add a default custom greeting to include with the instructions. *Settings > Firm Settings > Online Intake > General > Default Salutation.* Add some auto-calculating fields to include more detail.

DOWNLOADING INTAKES

☆ **Download and store completed intakes and inventories for seamless assemblies.** Once case answers are stored, answer fields will auto-fill your clients info during assembly. *Online Intake > Dashboard > Questionnaires Available For Download.* Select a completed questionnaire, then click the download icon.

Period: Type:

Items from: 02/23/2026 - 03/25/2026

Questionnaires available for download	Questionnaires incomplete/ not started	Unread messages	Documents from clients	Overdue tasks
3	3	0	1	4

Case	Questionnaire	Date completed	
Margaret Harper - Trust	Trusts - Prospective Client Information	03/25/2026	
Alysia Liu I - Divorce	Divorce Inventory	03/25/2026	
Axel Grease - Mechanic's Lien	Mech Liens - Prospective Client Info	03/25/2026	

Select the icon to download & store your client's data in TXdocs

GATHERING INVENTORIES

☆ Gather client's property inventories through intake questionnaires. Asset inventories are available for Family Law, Wills & Estates, and Probate. Clients can type out their own information using an inventory questionnaire. *Online Intake > Send Questionnaires.*

Divorce Inventory

Clients can hide categories & fill in their own inventories

Completed? Click to notify your attorney

Download their info directly from your Dashboard.

Questionnaires available for download: 3

Questionnaires incomplete/not started: 3

Unread messages: 0

clients: 1

Overdue tasks: 4

Case	Questionnaire	Date completed	
Margaret Harper - Trust	Trusts - Prospective Client information	03/25/2026	[Download]
Alysa Liu I - Divorce	Divorce Inventory	03/25/2026	[Download]
Axel Grease - Mechanic's Lien	Mech Liens - Prospective Client Info	03/25/2026	[Download]

Divorce inventories require a party selection for your client

INSTRUCTIONS

After you indicate if your client is the petitioner or the respondent, the property information your client entered on the internet will be downloaded.

On the next screen, you will be able to individually review each property item and debt item. After you have processed an item, it will be automatically moved into your inventory.

To review an item, you will select it and then either click the "Process" button or drag the item from the Client Data list into the Inventory list.

My client is the: Petitioner Respondent

Instructions: Highlight an item in the Client's Data list and click "Process". Or, drag the item from the Client Data list to the Inventory list.

ASSETS

- Household Items
 - Lamp
 - Coffee Maker
 - Vehicles (cars, trucks, boats, etc)
 - Vehicle: Toyota Corolla 2007
 - Real Estate
 - Property at 888 Wilbur St
 - Bank Account
 - Checking account # 1234 at Bank of America
 - Life Insurance
 - Term life insurance policy number 245678 from Wilsons Way
 - Sporting Goods and Firearms
 - Gifted Shares
 - Jewelry
 - Digital Assets
 - Bitcoin Gold Wallet
 - Bitcoin

Inventory

- Household Items in Possession of Petitioner
- Household Items in Possession of Respondent
- Motor Vehicles, Boats, Airplanes, etc.
- Real Estate
- Mineral Interests
- Other Real Property Related Asset

Property Inventory

Community	Petitioner separate	Respondent separate	Other property	Reimbursements	Value
Community Estate					
ASSETS					
Household Items in Possession of Petitioner					
					125.00
					850.00
					350.00
					200.00
Household Items in Possession of Respondent					
					4,500.00
Real Estate					
					330,000.00
Mineral Interests					
Other Real Property Related Asset					

(Hint: To Add an item, simply double-click on the category you want.)

Export Assemble OK Cancel Help

**CREATE SMARTER FORMS
SAVE HOURS OF DRAFTING**




EFILING

8 EFILING


CONNECTING YOUR ACCOUNTS

☆**eFile faster by connecting your eFile Texas account to TXdocs.** When selecting New eFiling for the first time, you'll be prompted to login to your eFile Texas account. Once you have logged in, eFile your assembled forms directly through TXdocs.



Integrated eFiling

The only integrated eFiling platform - file your documents without retyping case information.



New eFiling

eFile document(s)

① Log in ② Case ③ Documents ④ Jurisdiction ⑤ Case type ⑥ Filer

Already registered with eFile Texas? Log in with your existing credentials. ⓘ

Email:

Password:

Log in

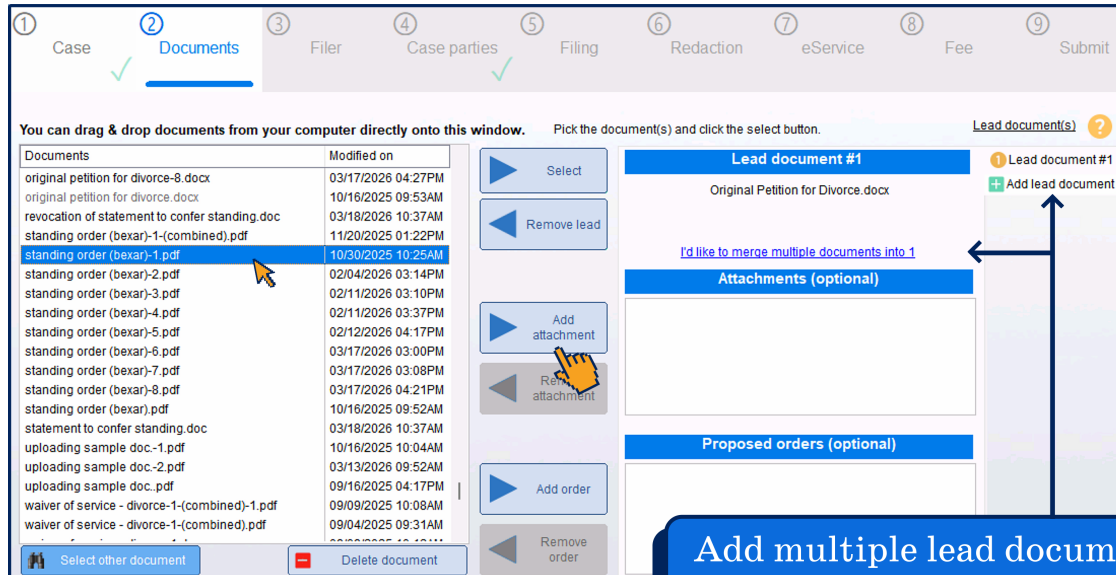
Not yet registered with eFile Texas?

Register now

Login with your existing eFile Texas account

SELECTING DOCUMENTS

☆ **Format file attachments to comply with court requirements.** Select lead documents and attachments in the formats requested by the clerk. You may even merge all documents into one PDF file if needed. *Integrated eFiling > New eFiling > Select Case > Documents Panel.*



○ DID YOU KNOW?

TXdocs auto-converts your .doc/.docx (Word) files into PDFs for faster eFiling?

STATUS ALL CASES

★View the status for ALL of your firm's filings, not just the ones filed through TXdocs. *Integrated eFiling> Status All Cases.*

STATUS ALL CASES

ALL YOUR EFILINGS AT YOUR FINGERTIPS

Status	Envelope#	TXdocs Case	Submitted On	Filing Description
Submitted	297805	Suzie Sample - Biz. Org.	11/18/2025 02:51PM	Plan of Conversion - C
Submitted	296538	John Smith - Probate	11/03/2025 10:09AM	Application for Probate
Submitted	295894	Nancy Neighbor - Divorce	10/21/2025 09:51AM	Motion for TRD-1
Rejected	295892	Nancy Neighbor - Divorce	10/21/2025 09:44AM	REDACTED - Motion
Accepted	295854	Edward Example - Divorce	10/20/2025 02:12PM	Original Petition for Divorce
Canceled	295415	Dr. John Watson - Probate- Intestate	10/08/2025 11:19AM	Application for Letters

- View the status of all your eFilings & eServings, even if they weren't filed through TXdocs
- Get a report on all paid fees
- Easily review rejected filings and resubmit with original time stamps
- Retrieve eFilings up to one whole year!

★Filter Status All Cases to display all your staff's filings, or just yours. *Integrated eFiling> Status All Cases> All OR Only Mine.* Note: This feature is only available to the Firm Admin.

○DID YOU KNOW?

You can view filings that you've served, and filings served to you through Status All Cases. *Status All Cases> Service Inbox/Outbox.*

**CREATE SMARTER FORMS
SAVE HOURS OF DRAFTING**



CONTACTS MANAGER

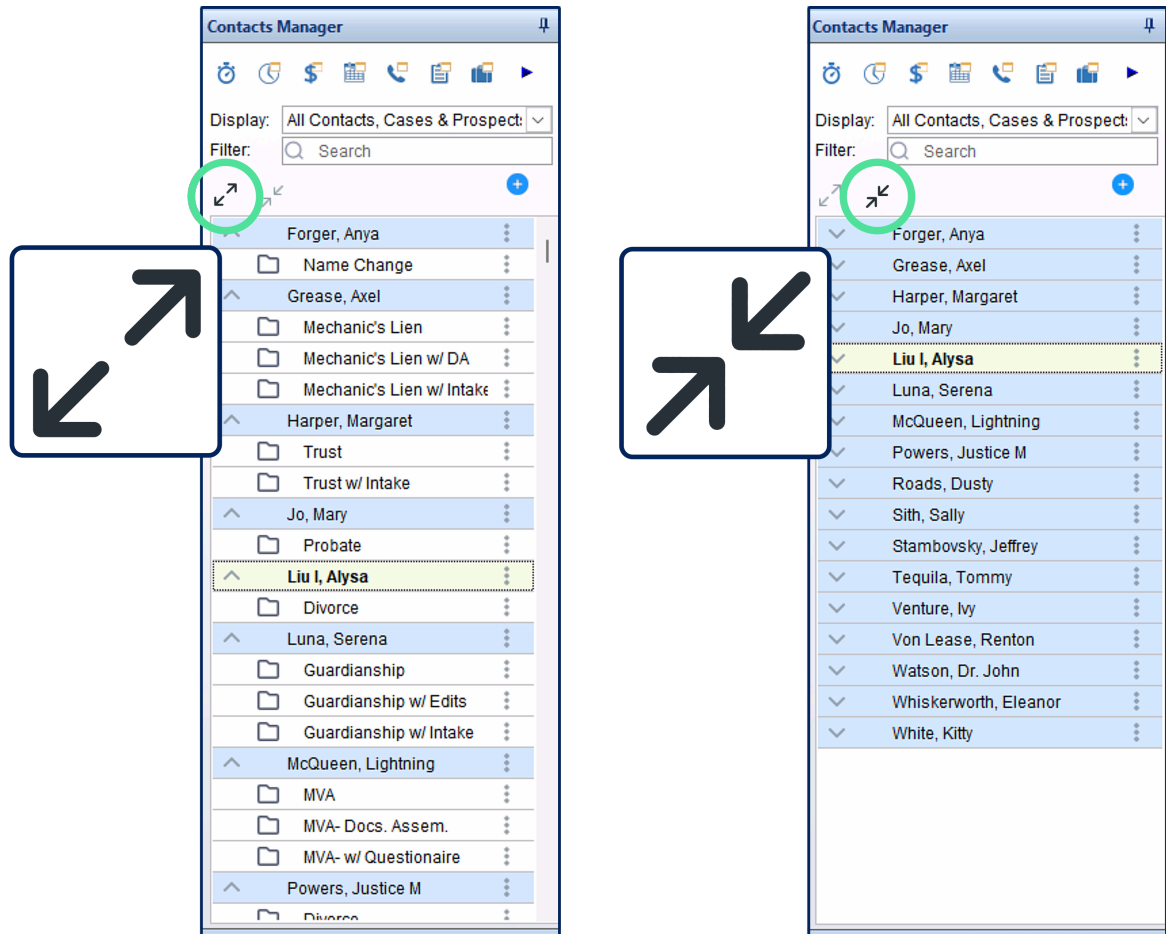
9 CONTACTS MANAGER

FILTER YOUR CONTACTS MANAGER

☆Filter contacts with the Display menu, or by using the Filter search bar. *Contacts Manager (Clients & Cases Manager for Standard users) > Display OR Filter.*

EXPAND & RETRACT LIST DISPLAY

☆Use the arrow icons to expand the clients and cases display, or retract it.

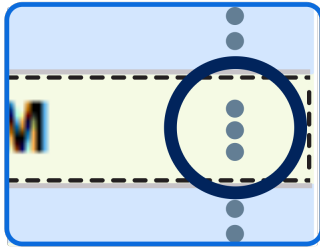


SELECTING CASES FROM YOUR CONTACTS MANAGER

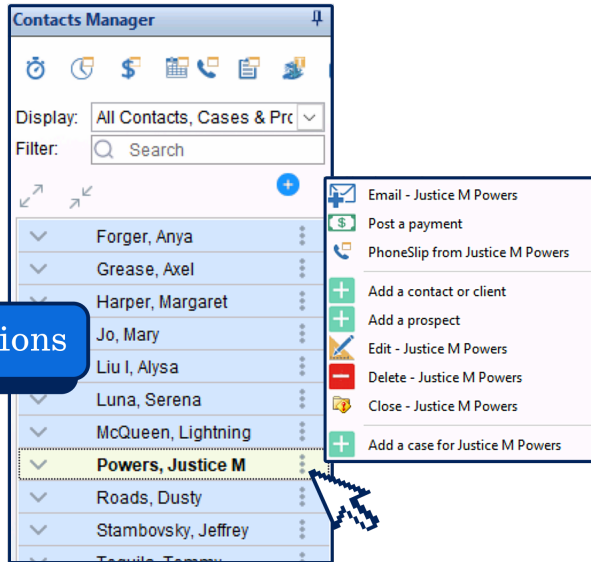
☆When performing case work, select the case under the client's name in the Contacts manager to attach your work to the correct matter.

OPENING CLIENT ACTION MENUS

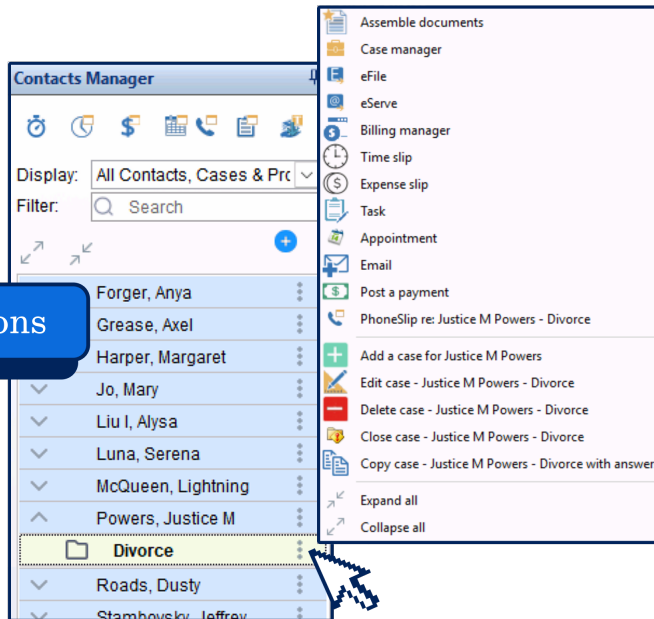
☆ Access more client menu options by clicking the three dots (AKA the kabob menu) next to your client's name.



More client actions



More case actions



CLOSING & REOPENING CASES

☆ **Close completed cases with the kabob menu to remove the client's name from the Contacts Manager.** *Contacts Manager > select client's case > Kabob menu (the three dots) > Close Case.*

☆ **If necessary, you may reopen previously closed cases.** *Clients & Cases > Reopen Clients/Cases.*

VIEWING YOUR CLIENTS' DOCUMENTS

☆ **Review, edit, or download your clients files through Client Documents.**

- **If using TXdocs Standard,** *Clients & Cases > Client Documents.*
- **If using TXdocsPlus,** *Practice Management > Case Manager > Activities > Documents.*

**CREATE SMARTER FORMS
SAVE HOURS OF DRAFTING**

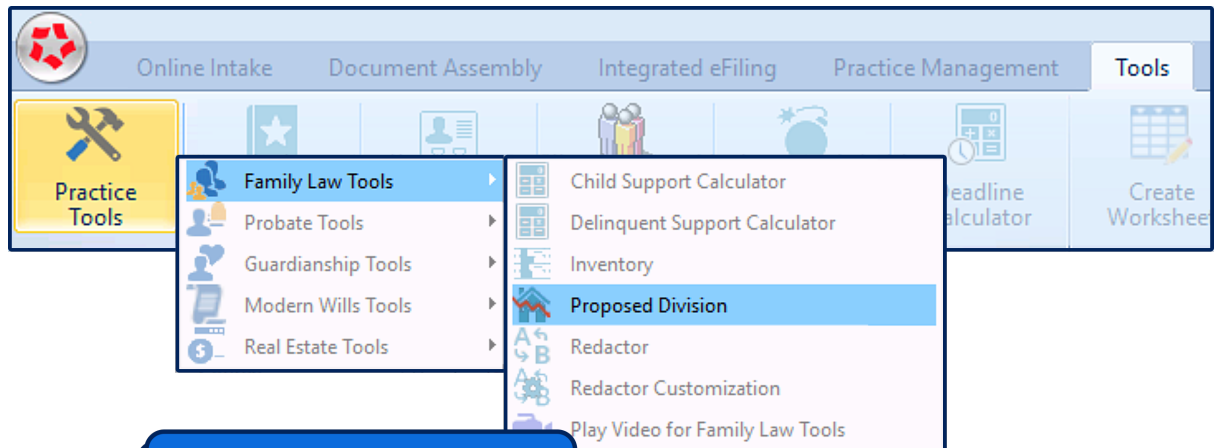


TOOLS

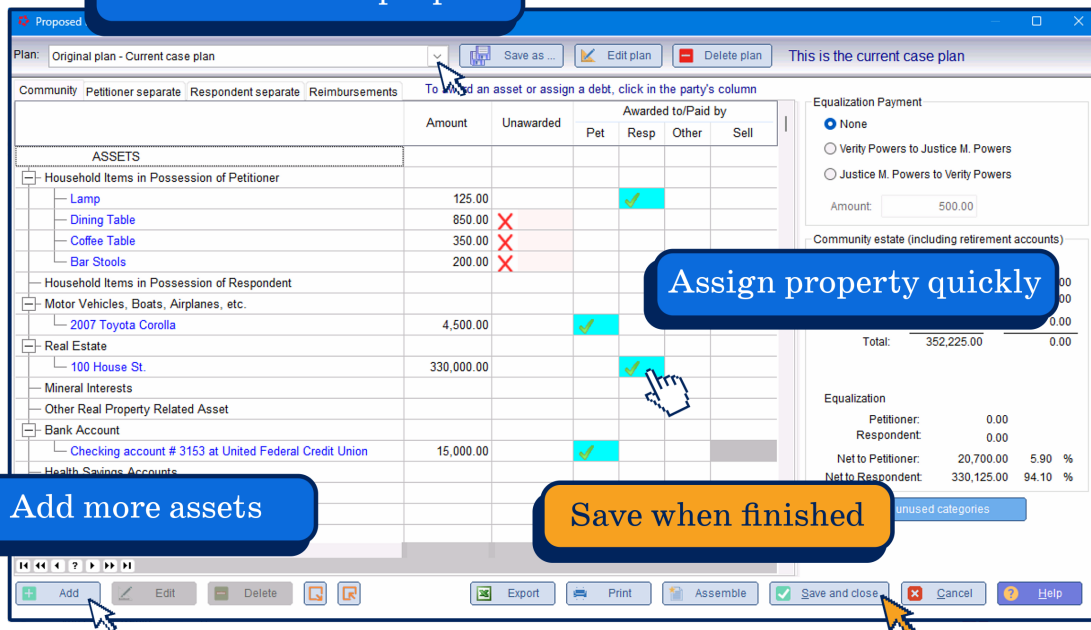
10 TOOLS

CREATE PROPERTY DIVISION PLANS

☆Use the Proposed Division Tool to quickly create division plans for divorces.
Tools > Practice Tools > Family Law Tools > Proposed Division.



Edit & save multiple plans



Assign property quickly

Add more assets

Save when finished

Cause No: ZZ-1389-2025
 Petitioner: Justice M. Powers
 Respondent: Verity Powers

PROPOSED DIVISION OF ASSETS AND LIABILITIES

COMMUNITY PROPERTY		
ASSETS	Value/Amount	Perc
Household Items in Possession of Petitioner		
Lamp	125.00	
Dining Table	850.00	
Coffee Table	350.00	
Bar Stools	200.00	
Motor Vehicles, Boats, Airplanes, etc.		
2007 Toyota Corolla	4,500.00	
Real Estate		
100 House St.	330,000.00	
Bank Account		
Checking account # 3153 at United Federal Credit Union	15,000.00	

Export your plan as an Excel & present it to the court or opposing counsel

CALCULATING PROBATE ESTATE INTEREST

☆Map out the decedent's family tree for instant calculations of heir's interest in the estate. *Tools > Practice Tools > Probate Tools > Heirship Tree*

The screenshot shows the 'Heirship Tree of Decedent' software interface. At the top, a navigation menu includes 'Practice Tools', 'Family Law Tools', 'Probate Tools', 'Guardianship Tools', 'Modern Wills Tools', and 'Real Estate Tools'. The 'Probate Tools' dropdown is open, showing options like 'Inventory', 'Annual Account', 'Final Account', 'Final Account - Temporary Administration', and 'Heirship Tree'. A callout box points to the 'Heirship Tree' option with the text: 'Interest auto-calculates when members are added'. The main window displays a family tree diagram with nodes for 'Father of Decedent', 'Mother of Decedent', 'Decedent', 'Current Spouse', 'Divorced Spouse', and children. A 'Calculation Details' pop-up window shows interest percentages for various family members. A callout box points to the 'Add CHILD - Current Spouse' button with the text: 'Select a name to add a family member'. At the bottom, a callout box says: 'Save the decedent's tree as an image, & present it to the court.' The interface also includes 'Print Tree' and 'Save Image' buttons.

○ DID YOU KNOW?

You can export your division plans as Excel files, or the Heirship Tree as an image that can be presented to the court and opposing counsel.

**CREATE SMARTER FORMS
SAVE HOURS OF DRAFTING**



LEARN & EARN

11 LEARN & EARN**○ DID YOU KNOW?**

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