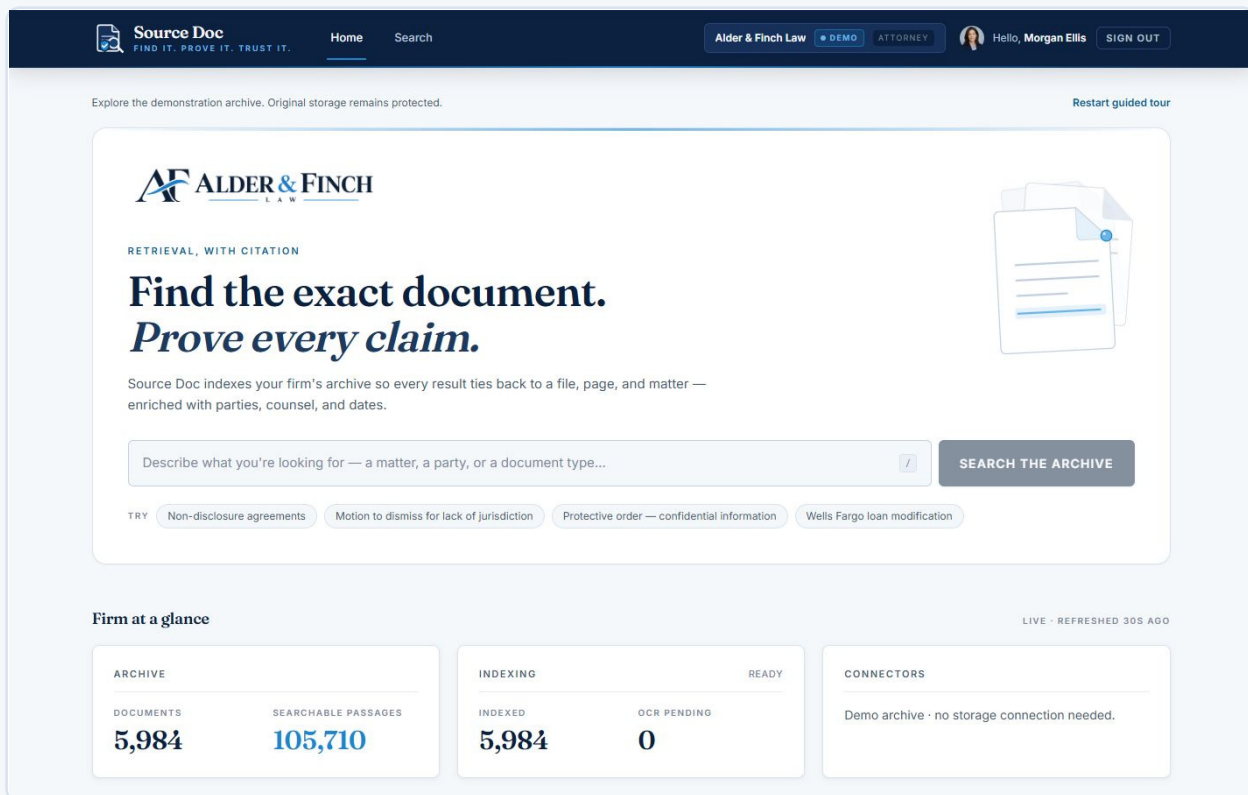


LIGHTNING-FAST, SECURE RETRIEVAL FOR LAW FIRMS

Find the right file. See the source.

Search the archive your firm already has, with a focused workspace for finding records and checking the evidence behind a result.



Alder & Finch Law workspace: 5,984 indexed documents and 105,710 searchable passages.

Keep your files

Connect Microsoft 365 read-only.
SFTP uses assisted onboarding.

Include the team

Unlimited users on every plan.
Choose the capacity that fits your archive.

Check the evidence

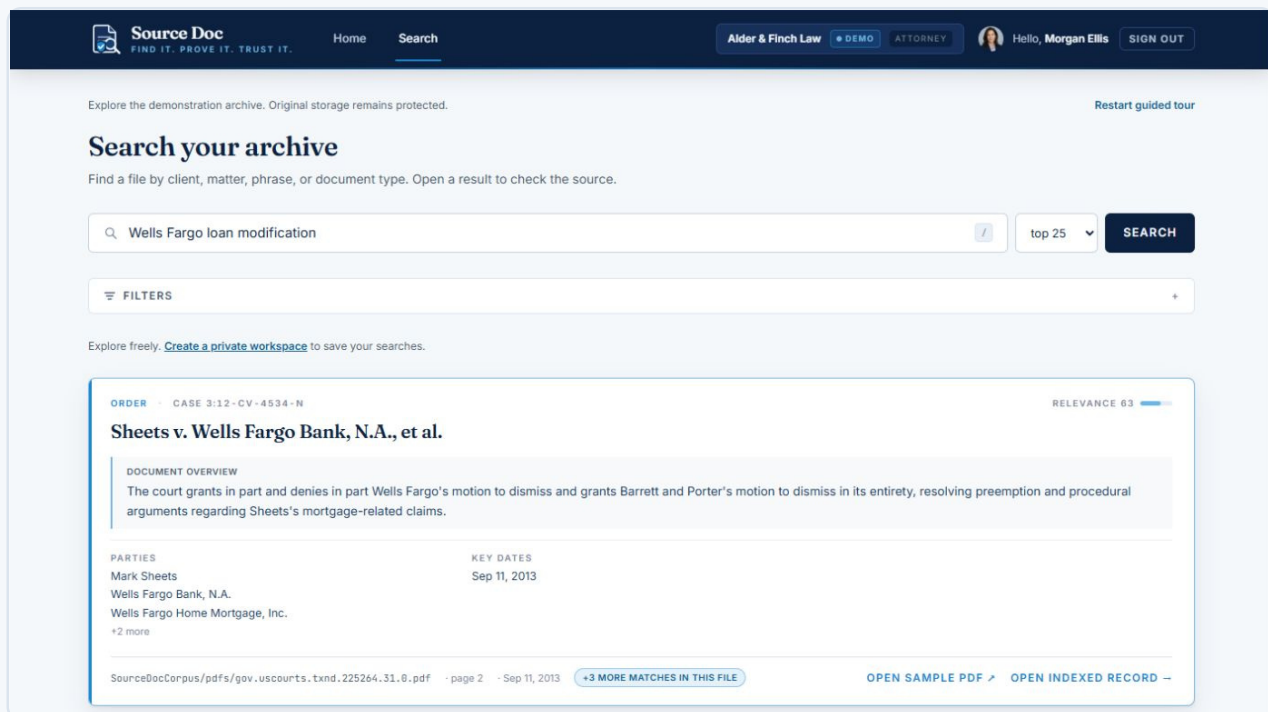
Follow file and page references.
Inspect the record behind a generated overview.

From \$149/month billed annually at \$1,788, or \$179 month-to-month.
Try it now: guided tour, no signup or card needed.

FROM QUESTION TO RECORD

Search with the context you remember.

Try a client, address, party, matter clue, or phrase. Narrow the results with filters and save searches you use again.



Explore court-document results in the public demo. Private workspaces also open the authenticated original.

01 Start with a useful clue

A title exception, closing address, or confidentiality agreement can be enough to begin.

02 Narrow the result set

Refine document type, matter, party, or date range when your search is broad.

03 Open the matching record

Inspect the source-linked result and matching passage before using it in your work.

Search results, often in under half a second. Five repeated searches: 256-304 ms server time. Initial pass: 293-1,463 ms. Six of ten calls under 500 ms; 5,984-document archive, September 7, 2026. Query, cache, and load affect time; not a 50,000-document benchmark.

SOURCE-FIRST REVIEW

Understand the record.

Details and document text open immediately. AI prepares a fuller summary in the background, with progress and links to supporting passages. Read the source while it works.

DOCUMENT SUMMARY

A Texas homeowner sued Wells Fargo and Barrett & Porter for wrongful foreclosure and related claims after Wells Fargo accelerated his mortgage and initiated trustee sale; the court dismissed all claims against Wells Fargo except a RESPA violation for failure to respond to Qualified Written Requests, and dismissed all claims against Barrett and Porter for lack of factual allegations; the plaintiff was granted leave to amend within 21 days.

Sheets obtained a mortgage in April 2003 and executed a note and deed of trust; Wells Fargo became the loan servicer after the Federal Home Loan Mortgage Company purchased the mortgage later in 2003. [View passage 3](#)

▶ Supporting excerpt

Sheets sent Qualified Written Requests to Wells Fargo under RESPA, but Wells Fargo allegedly responded to none of them, prompting Sheets to sue for RESPA violations. [View passage 19](#)

▶ Supporting excerpt

The court dismissed Sheets's wrongful foreclosure claim because he did not allege he lost possession of the property, which is required under Texas law. [View passage 15](#)

▶ Supporting excerpt

The court dismissed Sheets's slander of title claim for failure to allege malice, special damages, or loss of a specific sale. [View passage 17](#)

▶ Supporting excerpt

The court dismissed all claims against Barrett and Porter because the complaint was silent as to their roles and failed to provide notice of conduct supporting the claims. [View passage 25](#)

▶ Supporting excerpt

AI-generated from this document. Check the linked passages before relying on the summary.

AI-generated overview and linked key points. Review the supporting excerpts against the record.

Document text Show extracted line breaks JUMP TO MATCH ↓

MATCHED PASSAGE

IN THE UNITED STATES DISTRICT COURT NORTHERN DISTRICT OF TEXAS DALLAS DIVISION MARK V. SHEETS, § § Plaintiff, § § v. § Civil Action No. 3:12-CV-4534-N § **WELLS FARGO BANK, N.A.**, et al., § § Defendant. § ORDER This Order addresses Defendants **Wells Fargo Bank, N.A.'s ("Wells Fargo Bank")** and **Wells Fargo Home Mortgage, Inc. ("WFHM")** and, collectively with **Wells Fargo Bank, ("Wells Fargo")** motion to dismiss [Doc. 14] and Defendants Barrett Daffin Frappier Turner & Engel ("Barrett") and Stephen C. Porter's motion to dismiss [17].¹ The Court grants **Wells Fargo's** motion in part and denies it in part, and the Court grants Barrett and Porter's motion in its entirety.² **Wells Fargo** advised the Court that Sheets has filed for bankruptcy protection. The Court concludes that the automatic stay applicable to cases against bankruptcy debtors does not apply to this case. See Picco v. Global Marine Drilling Co., 900 F.2d 846, 850 (5th Cir. 1990) ("[D]istrict courts retain jurisdiction to determine the applicability of the stay to litigation pending before them, and to enter orders not inconsistent with the terms of the stay."). 11 U.S.C. § 362 stays actions against debtors but is silent as to

Full-width document text. Private workspaces open authenticated originals; the demo offers sample PDFs.

Access and oversight for your whole team

Give receptionists selected matter scopes while attorneys access their assigned records. Server checks govern search, document opens, and AI retrieval. Sign-ins, searches, document views, and permission changes are recorded to support firm oversight and compliance reviews.

Read the security overview at getsourcedoc.com/security

RETRIEVAL BEFORE ANALYSIS

Let AI analyze the evidence. Let Source Doc find it.

Source Doc prepares your archive for lightning-fast search. Give your chosen AI relevant records to analyze, with file and page references you can check.

Read all 50,000 files

About \$200

One full pass: 100 million input tokens, assuming 2,000 tokens per file. At 2 million new tokens per minute, budget about 50 minutes of API capacity for that volume.

Retrieve, then analyze

About one cent

A focused example: 10 passages × 500 tokens = 5,000 input tokens. Source Doc browser search works without a separate AI subscription.

Both cost examples use Claude Sonnet 5 standard input pricing of \$2 per million tokens. The time figure is a full-pass capacity estimate, not an average time to find a document. An early match can be faster; indexed AI tools and caching avoid repeated full reads. Output, OCR, indexing, metadata, prompts, and extra fetches add work. Actual speed and limits vary.

Ready to search, ready to verify

Connected storage, OCR, matter context, hybrid search, and relevance ranking work together. Find the right file, inspect the passage, and open the original in one workflow.

Controlled access for people and AI

Member scopes apply to browser search and MCP retrieval. Personal tokens inherit the member's permissions and can be revoked; login and activity records support firm oversight.

Connect your AI with MCP

Create a personal token in Source Doc. Add <https://app.getsourcedoc.com/api/mcp> to a compatible AI client, with your token as the bearer credential. Search and fetch selected records, then verify the answer against the source.

Sources checked September 7, 2026: [Claude API pricing](#) | [rate limits](#) | [retrieval and ranking](#).

WHY SOURCE DOC

Keep your archive. Skip the storage move.

Lightning-fast, source-linked retrieval over the storage your firm already uses. Unlimited users and pricing by indexed-document capacity.

Source Doc and LexWorkplace Core

Originals	Source Doc keeps files in your existing storage. LexWorkplace migrates documents into its hosted DMS.
Storage cost	Source Doc adds no fee for storing originals. Core includes 1,000 GB, then charges \$40/month per extra 100 GB.
Team size	Source Doc includes unlimited users. Core includes three users, then charges \$50/month per additional user.

A five-person firm: \$299 vs \$495/month

Source Doc Practice: \$3,588 paid yearly (\$299/month equivalent), up to 50,000 documents. LexWorkplace Core: \$395 + two \$50 users = \$495/month. At 1,500 GB, Core adds \$200/month in storage: \$695/month total. Source Doc month-to-month is \$359.

Compared with NetDocuments and iManage

Their broader DMS platforms offer AI search and document management. Source Doc focuses on quickly finding existing records and opening the evidence, without a DMS migration project.

Compared with Microsoft 365 Copilot

Copilot adds per-user productivity AI across Microsoft 365. Source Doc offers unlimited-user archive search across supported sources, with OCR and matter context. Copilot can cost less for a small team; compare the workflow and total cost.

Different bundles and terms. Existing storage costs continue with Source Doc; capacity is measured in indexed documents, not GB. Vendor sources, September 7, 2026: [LexWorkplace pricing](#) | [migration](#) | [NetDocuments](#) | [iManage](#) | [Copilot](#).

CHOOSE THE RIGHT WORKFLOW

Find your firm's records. Keep your existing workflow.

Source Doc adds focused archive retrieval alongside the tools your firm already uses, with unlimited users and predictable capacity pricing.

Source Doc

Find and verify existing records

Search approved storage folders, follow matching passages, and open the source. AI summaries load while you read. Roles, matter scopes, and activity audits support firm oversight.

Practice: \$359/month for the firm.
Or \$3,588 paid yearly (\$299/month equivalent). Up to 50,000 documents, unlimited users.

Clio Work

Analyze, research, and draft

Matter analysis, legal research, and drafting with cited sources. Use standalone document uploads or connect Clio Manage for matter context.

Quoted per-user pricing.
Ask for the total for everyone who needs access and the services included in your plan.

A focused addition to your practice tools

Keep your current practice-management system and add Source Doc for fast access to your archive. Bring selected evidence to a compatible AI client through MCP when you want further analysis.

Keep control of your storage

Source Doc charges for searchable document capacity while originals stay in your existing storage. Clio Manage includes unlimited storage, and enterprise Vincent offers document-system connections. Choose the source coverage and workflow that fit your firm.

Vendor sources checked September 7, 2026: [Clio Work pricing and capabilities](#) | [Clio Manage plans](#) | [Vincent integrations](#). Compare contracted scope and total cost; these products provide different feature bundles.

TRANSPARENT PRICING

Priced by archive size. Open to the whole team.

Unlimited users. Standard onboarding included on Starter, Practice, and Vault. All prices below are USD.

Starter

Up to 10,000 documents

\$149 /month

\$1,788 billed yearly

\$179/month
month-to-month

One storage connector

Practice

Up to 50,000 documents

\$299 /month

\$3,588 billed yearly

\$359/month
month-to-month

All supported connectors

Vault

Up to 150,000 documents

\$599 /month

\$7,188 billed yearly

\$719/month
month-to-month

All supported connectors

Enterprise: custom capacity, deployment, and terms. Contact us for a quote.

Annual plans charge the whole year upfront and renew yearly; monthly plans charge automatically every month. Upgrade, downgrade, or switch intervals in the Stripe portal; review prorated charges or credits before confirming. Secure Stripe checkout opens your private workspace with guided setup. SFTP onboarding is assisted by our team.

Starter extra connectors: \$49/month each. Extra capacity after the 10% grace window: \$50/month per 10,000 documents, agreed before billing. Custom services quoted separately.

See Source Doc in action.

Explore the guided demonstration archive, then choose the plan that fits your firm. Connect approved folders, search your records, and follow every result back to its source. Our team is here to help you get started.

[Try it now](#) | [Create a workspace](#) | [Request a private pilot](#)