

triSearch®

Training Guide

# **ACCESSING BILLING & ACTIVITY CODES**

- How to access the billing system
- How to set up activity codes

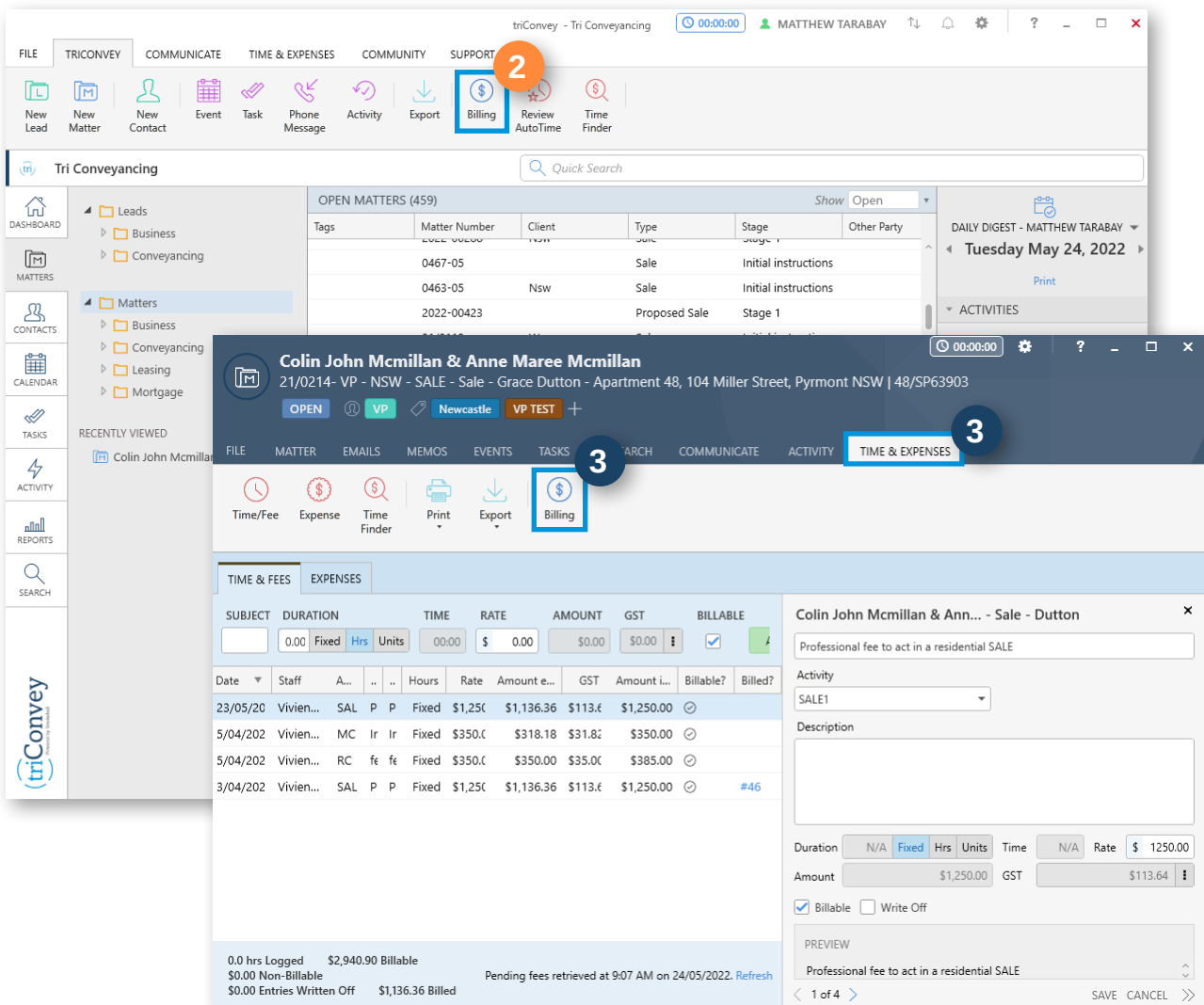
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# Accessing Billing system

1. Open triConvey to display the dashboard.
2. Select the 'Billing' icon at the top of the dashboard.
3. Manage all matters using the left-hand side icons.
4. Edit displayed matters by selecting filters in the 'Matter Type' tab on the left-hand side.

# Accessing Billing within a triConvey Matter

1. Open triConvey to display the dashboard.
2. Open the intended Matter.
3. Navigate to 'Time & Expenses' tab to open Billing system.



# How to set up Activity Codes

1. Enter triConvey Billing via the 'How to access Billing system from within a triConvey Matter' instructions.
2. Open the Billing settings via the cog wheel at the top of the Billing dashboard. NOTE: This is located to the left of the question mark.
3. Select 'Firm Settings' from the drop-down menu.
4. Select the 'Time & Activities' tab.
5. Select 'Create an activity' hyperlink under 'Activities' title.
6. Choose between 'Fee', 'Time', or 'Expense' option.
7. Enter an abbreviated code. NOTE: This has a max 5 characters limit.
8. Enter the remaining details needed.
9. Select 'Create Activity' once finished.

