triSearch®

Training Guide

ADDING & REMOVING EXPENSES

- How to add or remove expenses
- How to edit existing entries

How to add or remove expenses

1. Open triConvey to display the dashboard.
2. Select the 'Billing' icon at the top of the dashboard.
3. Open the Billing specifics for a matter by selecting the relevant one via the Billing dashboard.
4. Enter the 'Time & Fees' tab and select 'New Time Entry' to add a standard fee.
5. Enter the intended information in the relevant fields.
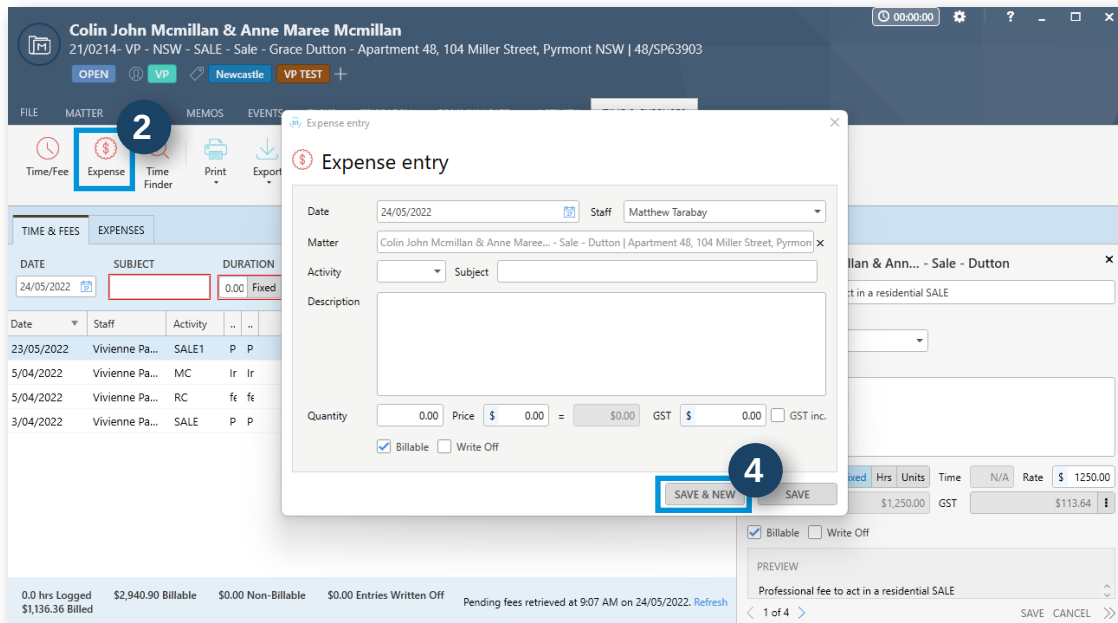6. Select 'Save' once finished.

How to add an expense item

1. Repeat steps 1 - 3 from 'How to add or remove expenses'.
2. Enter the 'Expenses' tab and select 'New expense entry'.
3. Enter the intended information in the relevant fields.
4. Select 'Save' once finished.

How to edit entries

1. Repeat steps 1 - 3 from 'How to add or remove expenses'.
2. Double click on the intended entry.
3. Edit intended information.
4. Select 'Update' once finished.