

triSearch®

Training Guide

ADDING & REMOVING EXPENSES

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

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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.

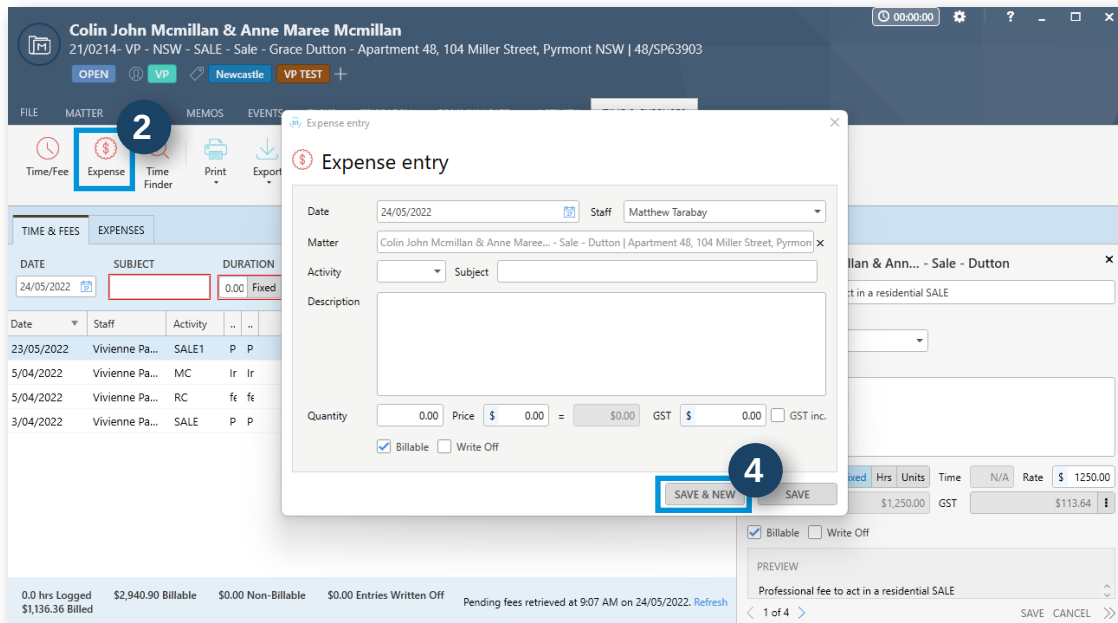
The screenshot displays the triConvey interface for a matter titled "Colin John Mcmillan & Anne Maree Mcmillan". The "TIME & EXPENSES" tab is active. A "Time/Fee entry" dialog box is open, showing the following details:

- Date:** 24/05/2022
- Staff:** Matthew Tarabay
- Matter:** Colin John Mcmillan & Anne Maree... - Sale - Dutton | Apartment 48, 104 Miller Street, Pyrmont NSW
- Duration:** 0.00 Fixed Hrs Units
- Time:** 00:00
- Rate:** \$ 0.00
- Amount:** \$0.00
- GST:** \$0.00
- Billable:** Billable Write Off
- Activity:** (Dropdown menu)
- Subject:** (Text field)
- Description:** (Text area)

At the bottom right of the dialog box, the "SAVE & NEW" button is highlighted with a blue box and a circled "6".

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.

