# triSearch®

Training Guide

AUTOMATION SETTINGS

- Setting up automation settings
- Enabling outlook notifications
- Enabling integration

How to Set Up Automation Settings

1. Open triConvey to display the dashboard.
2. Select the File tab in the top left corner and click on the triConvey settings option.
3. Select 'Automation Settings' tab from the left-hand side.
4. Check the intended boxes under Firm Forms and Electronic Service.
5. Choose between 'We' and 'I' for Letters and document firm referencing.
6. Select Save once finished.
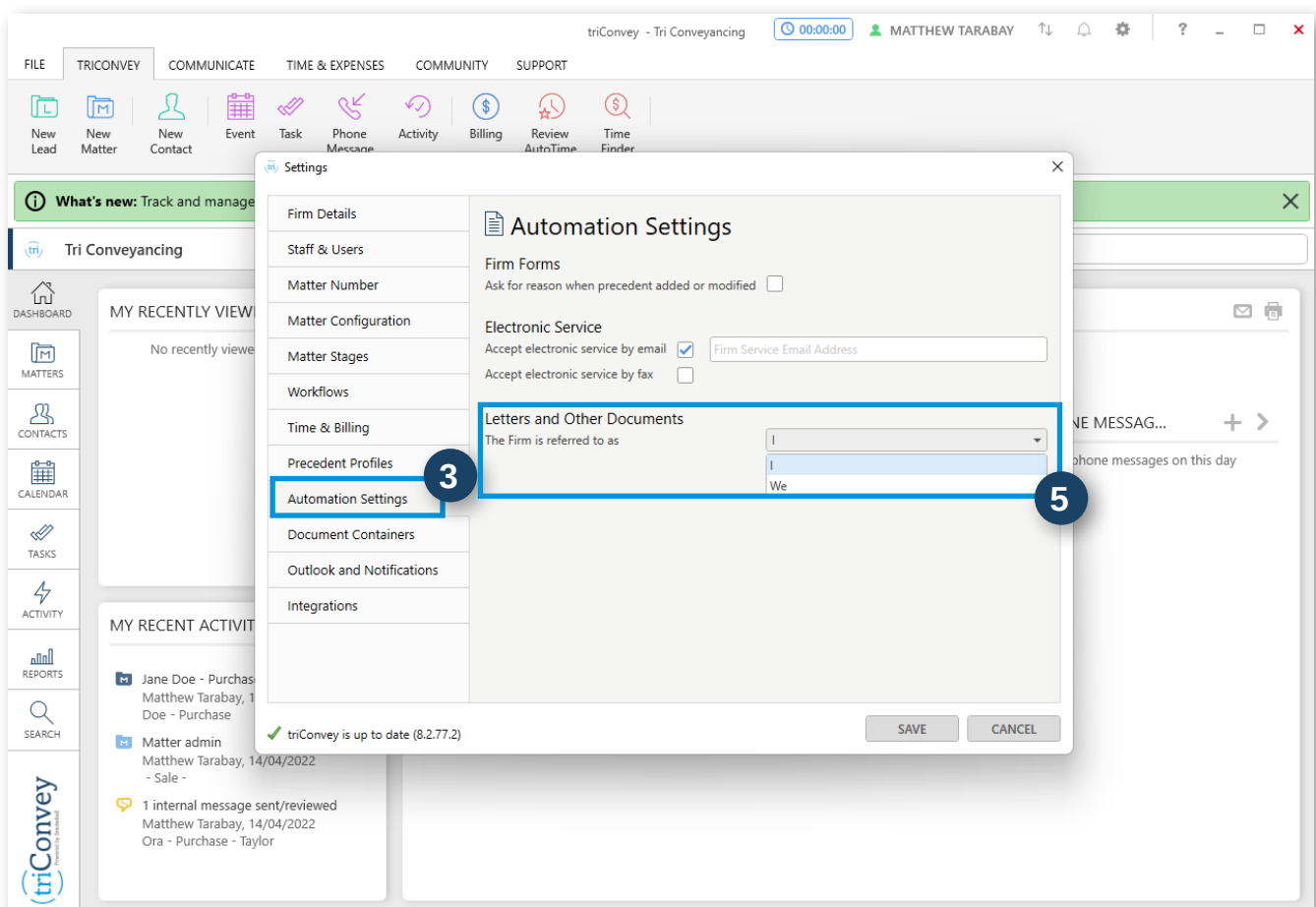
How to Enable Outlook Notifications

1. Repeat Steps 1 & 2 from 'How to Set Up Automation Settings'.
2. Select 'Outlook and Notifications' tab from the left-hand side.
3. Check the 'Notifications' menu box to enable or disable daily summary e-mails. NOTE: This option is unique to each user.
4. Enable 2-way synchronisation of Calendar appointments with Microsoft outlook, select 'Configure' option.
5. Select the 'Refresh calendar list' hyperlink and select the 'Calendar' checkbox and save.
6. Check all remaining boxes under the 'Outlook' menu for intended synchronisation settings. NOTE: these options will affect all firm users.
7. Select 'Save' once finished.
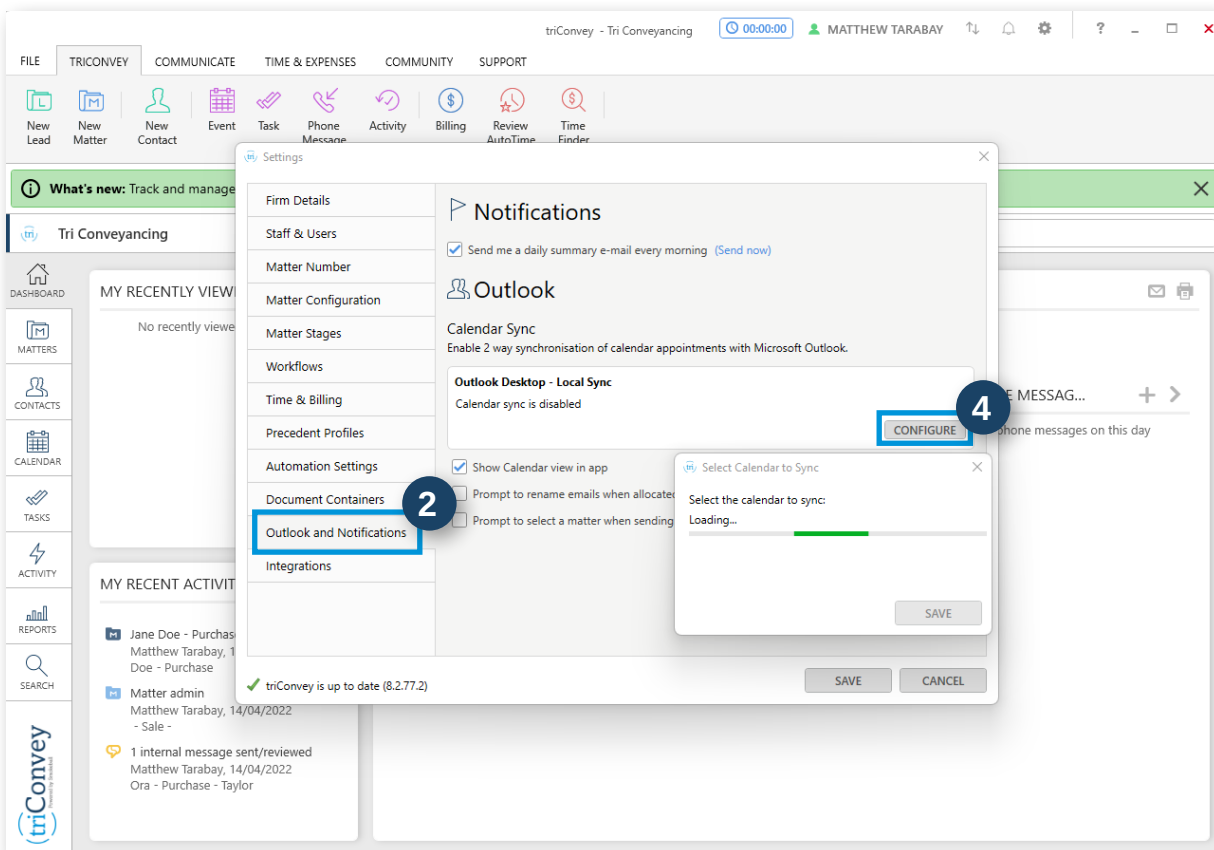
How to Enable Integrations

1. Repeat Steps 1 & 2 from 'How to Set Up Automation Settings'.
2. Choose the 'triSearch' tab for integration options.
3. Check both boxes and select 'Authorise' button.
4. Enter in your triSearch Search credentials
5. Select 'Save' once finished.