triSearch®

Training Guide

TRUST ACCOUNTING

- Navigating to Billing System & Open Trust Transactions
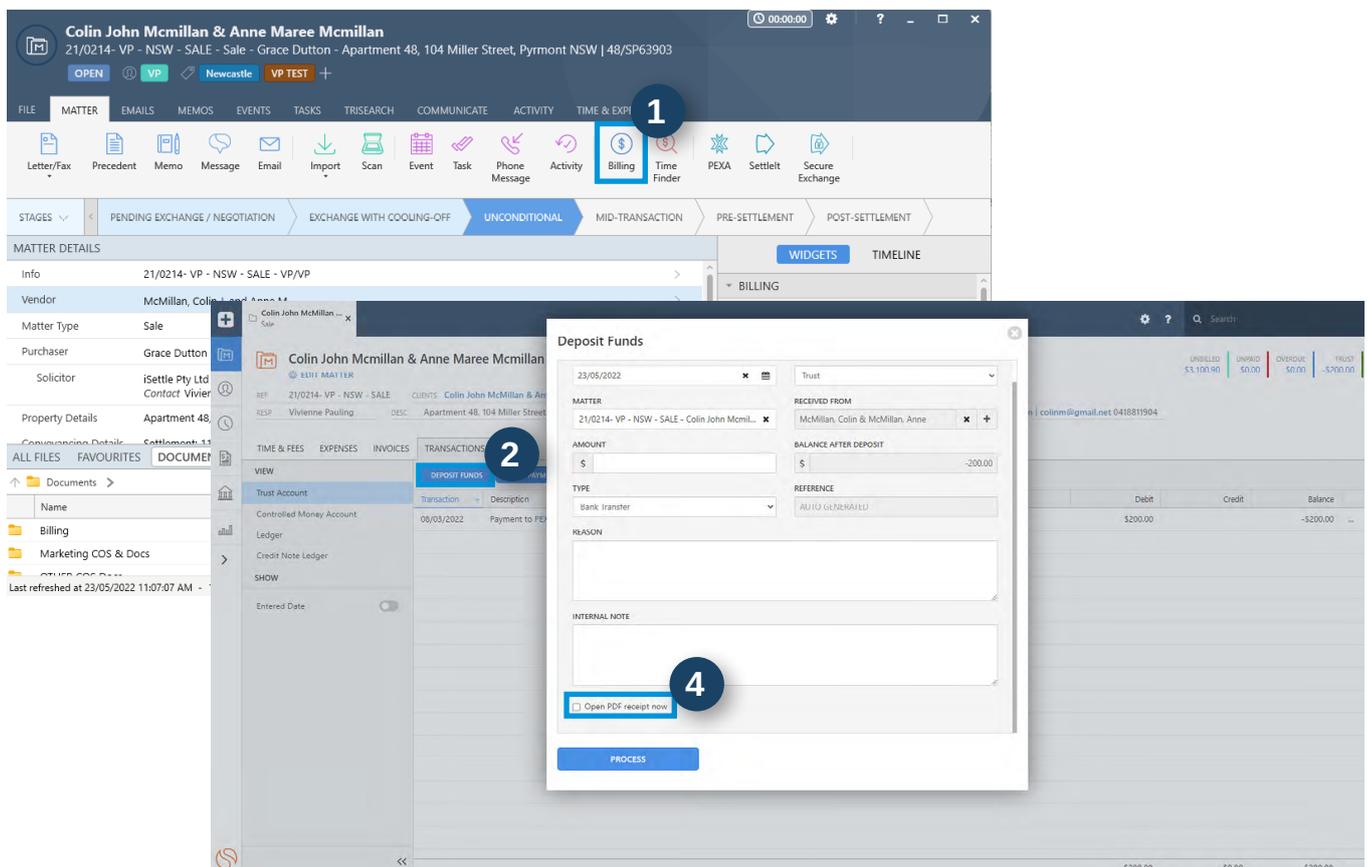- Entering a Trust Deposit
- Entering a Trust Payment

Navigating to the Billing System

1. From the triConvey dashboard, enter the intended matter card.
2. Select the 'Billing' icon from the top action bar.
3. Select 'Transactions' tab to open matter trust options.

Entering a Trust Deposit

1. Repeat Steps 1-3 in 'Navigating to the Billing System'.
2. Select 'Deposit Funds' button.
3. Enter all deposit fields necessary and reason for deposit. NOTE: The deposit date will default to the date you action this but can be changed to suit the deposit day.
4. Select 'Open PDF receipt now' button.
5. Once finished, select 'Process' button. The receipt is auto generated and opened on screen for review.
6. The new deposit will now appear in the matter Trust Account 'Transactions' tab.

Entering a Trust Payment

1. Repeat Steps 1-3 in 'Navigate to the Billing System'.
2. Select 'Trust Payment' button.
3. Enter all payment fields necessary and reason for deposit.
4. Select 'Open PDF payment order now' button.
5. Once finished, select 'Process' button. The payment is auto generated and opened on screen for review.
6. The new payment will now appear in the matter Trust Account 'Transactions' tab.