

triSearch®

Training Guide

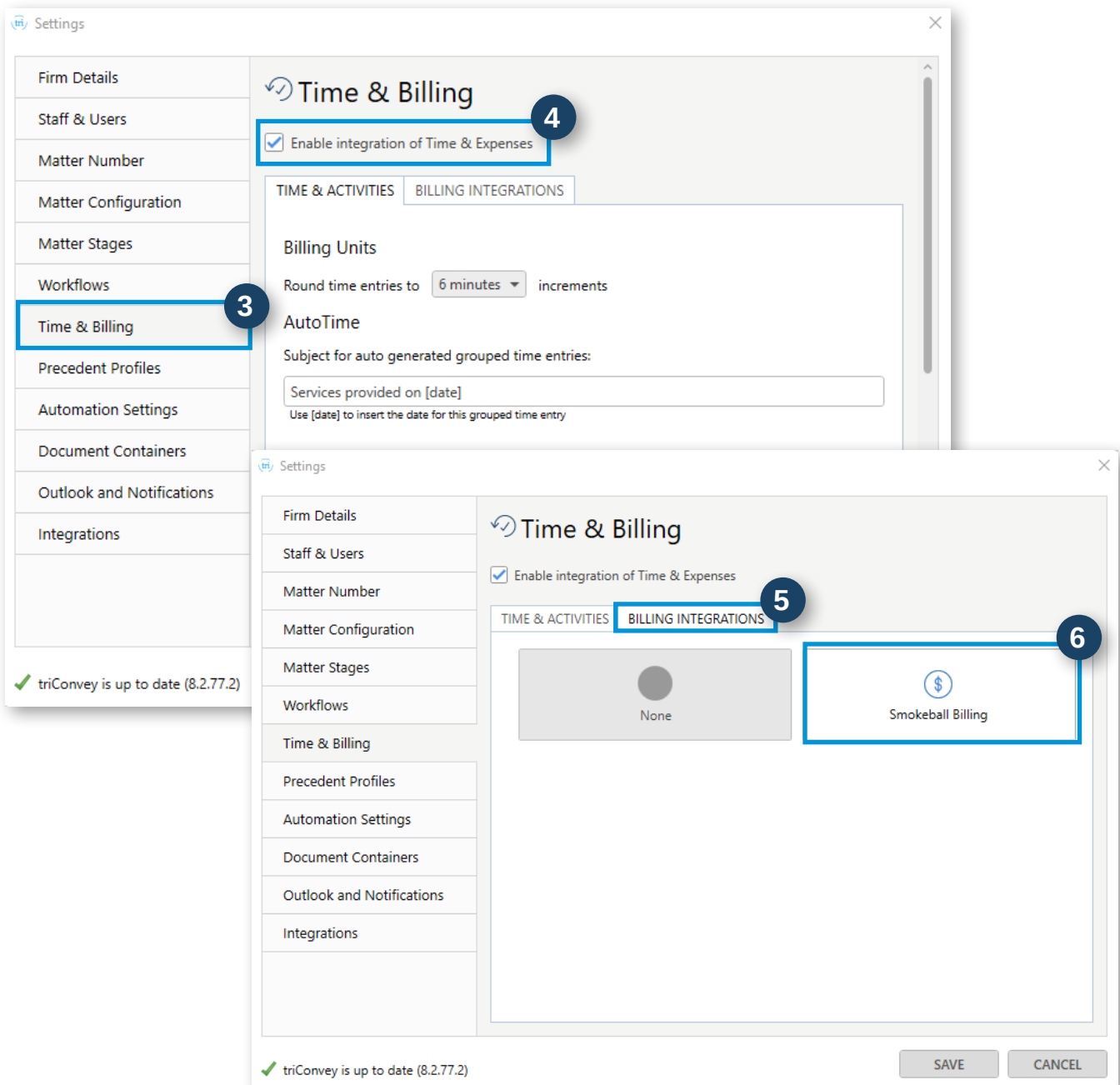
CONNECTING TO BILLING

- How to turn on Billing
- How to log into the billing system

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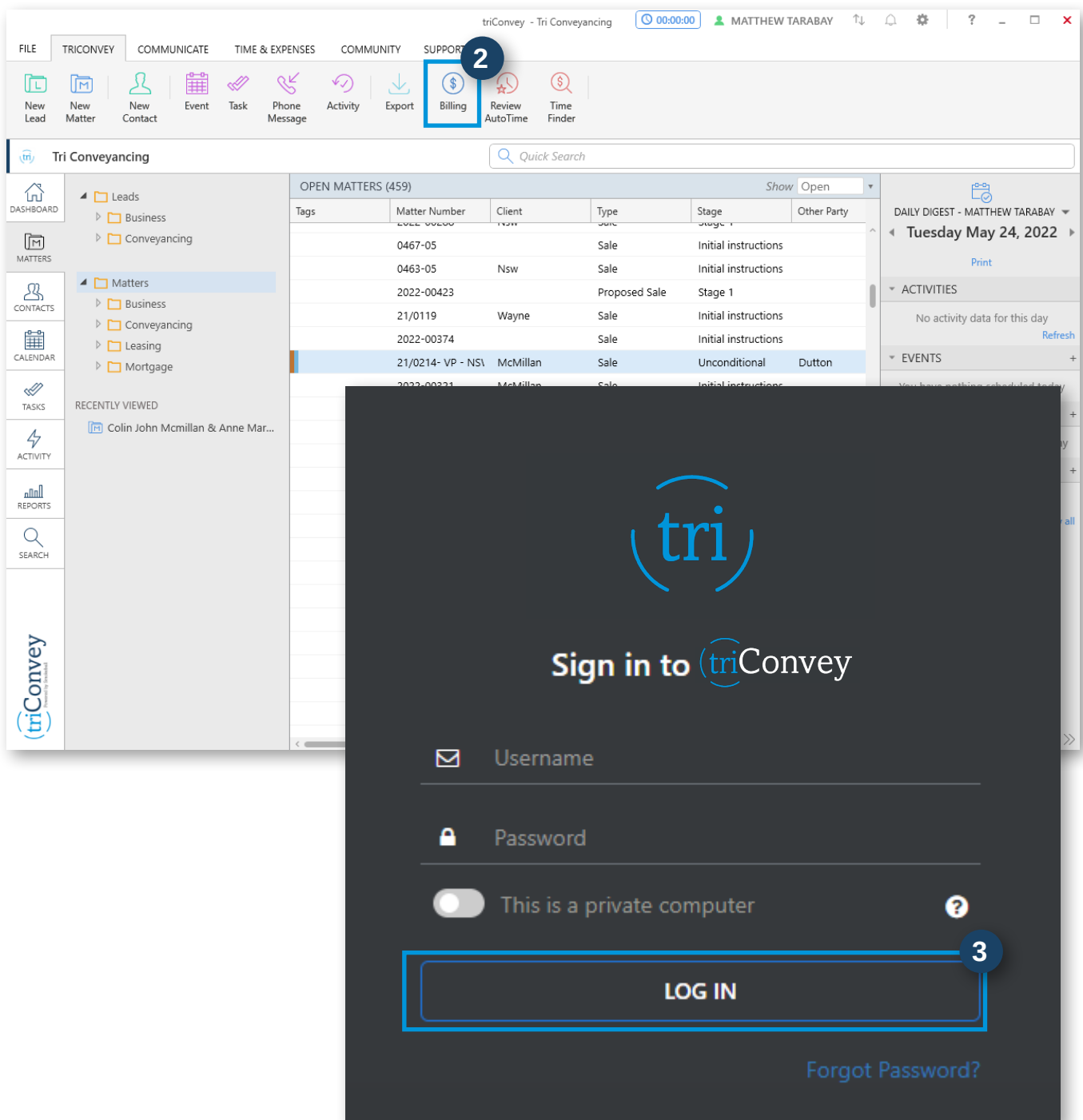
How to turn on Billing

1. Open triConvey to display the dashboard.
2. Select the 'Settings' via the cog wheel at the top of the dashboard.
3. Select the 'Time & Billing' tab.
4. Tick 'Enable integration of Time & Expenses'.
5. Select the 'Billing Integrations' tab.
6. Select the 'Smokeball Billing' option.
7. Select 'Save' once finished.



How to log into the billing system

1. Open triConvey to display the dashboard.
2. Select the 'Billing' icon.
3. Enter triConvey username and password credentials.
4. NOTE: You will only need to login to this page once, as long as you stay logged into the software.



The screenshot shows the triConvey dashboard interface. The 'Billing' icon, represented by a dollar sign, is highlighted with a blue box and a circled '2'. A dark grey login overlay is positioned in the foreground, featuring the triConvey logo at the top. Below the logo, the text 'Sign in to triConvey' is displayed. The login form includes fields for 'Username' and 'Password', a toggle switch for 'This is a private computer', and a 'LOG IN' button highlighted with a blue box and a circled '3'. A 'Forgot Password?' link is located at the bottom right of the overlay. The background dashboard shows a navigation menu on the left, a central table of 'OPEN MATTERS (459)', and a right-hand sidebar with a 'DAILY DIGEST' for Tuesday May 24, 2022.

Tags	Matter Number	Client	Type	Stage	Other Party
	0467-05	Nsw	Sale	Initial instructions	
	0463-05	Nsw	Sale	Initial instructions	
	2022-00423		Proposed Sale	Stage 1	
	21/0119	Wayne	Sale	Initial instructions	
	2022-00374		Sale	Initial instructions	
	21/0214- VP - NSI	McMillan	Sale	Unconditional	Dutton
	2022-00321	McMillan	Sale	Initial instructions	