

triSearch®

Training Guide

# CREATING & EDITING INVOICES

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# How to create and format a new invoice

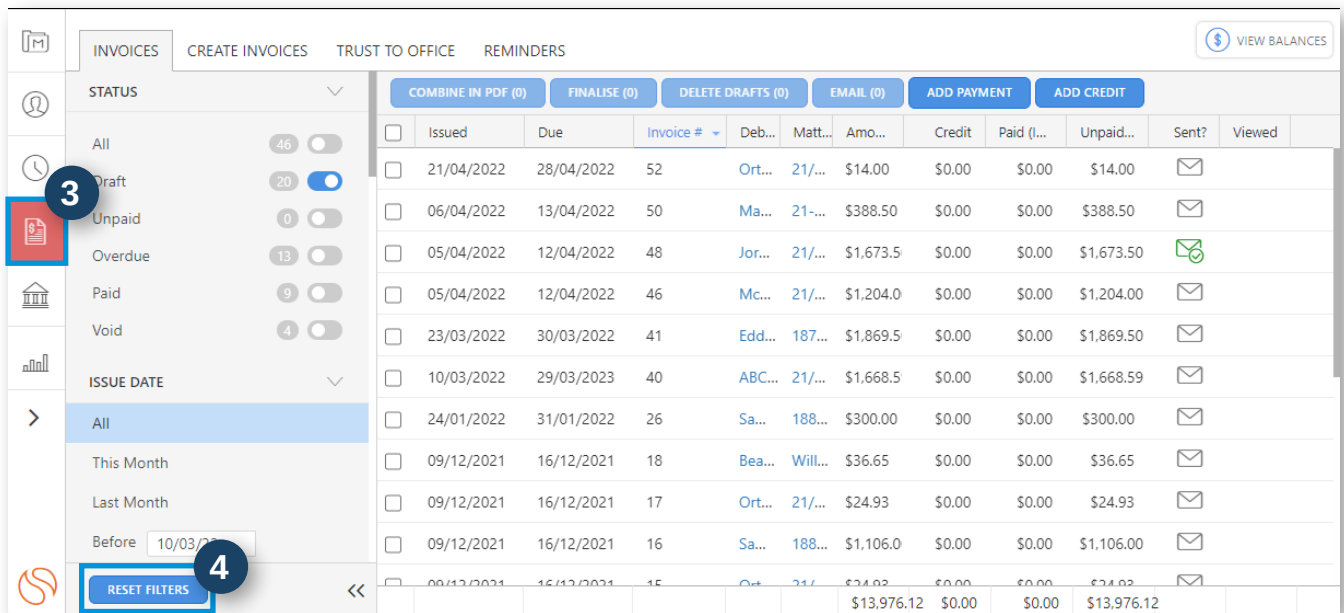
1. Open a triConvey matter.
2. Select the 'Billing' icon at the top of the matter.
3. Select the 'Create Invoice' button in either the 'Time & Fees', 'Expenses', or 'Invoices' tabs. NOTE: For best practice enter the 'Invoices' tab.
4. Ensure all details are entered correctly, including the Time, Fees & Expenses.
5. For changes to format, select the settings cog in the top right of the draft invoice.
6. Choose 'Firm Details' from the left-hand side menu.
7. Make any changes necessary from the options available. NOTE: Select the 'PDF Invoices' button for more customisation.
8. Select 'Save' once finished.

The screenshot illustrates the triConvey interface for creating and formatting a new invoice. It is divided into several key sections:

- Matter Overview:** Shows the matter name 'Colin John Mcmillan & Anne Maree Mcmillan - Sale', reference number '21/0214- VP - NSW - SALE', and client details.
- Navigation:** Includes tabs for 'TIME & FEES', 'EXPENSES', and 'INVOICES'. A 'CREATE INVOICE' button is highlighted with a circled '3'.
- New Invoice Form:** Contains fields for 'ISSUE DATE' (24 May 2022), 'DUE DATE' (31 May 2022), and 'DEBTORS/CLIENTS' (McMillan, Colin & McMillan, Anne). A settings cog icon in the top right is highlighted with a circled '5'.
- Summary Panel:** Displays a breakdown of costs: Time and Fees (\$1,804.54), Expenses (\$145.00), Subtotal (\$1,949.54), and GST (\$194.96), resulting in a **Balance Due** of **\$2,144.50**.
- Settings Modal:** A 'Settings' window is open, with the 'Invoice Settings' tab selected (highlighted with a circled '6'). It shows options for 'eInvoice Preview' (grouped by Staff or list), 'Firm Default' settings, and 'Your logo' upload options. The 'PDF Invoices' option is selected.
- Table:** A table with columns 'Rate', 'GST', 'Total', 'W/O', 'Billable', and 'View' is visible, showing invoice entries.

## How to filter existing invoices

1. Open triConvey to display the dashboard.
2. Select the 'Billing' icon at the top of the dashboard.
3. Select the 'Invoices' tab.
4. You can apply a range of filters on the left panel.



The screenshot shows the 'INVOICES' section of the triConvey dashboard. The left sidebar contains filter options for 'STATUS' and 'ISSUE DATE'. The 'STATUS' filter is set to 'All' (46 items), and the 'ISSUE DATE' filter is set to 'All'. A 'RESET FILTERS' button is visible at the bottom of the sidebar. The main area displays a table of invoices with columns for Issued, Due, Invoice #, Deb..., Matt..., Amo..., Credit, Paid (...), Unpaid..., Sent?, and Viewed. The table contains 15 rows of invoice data.

Issued	Due	Invoice #	Deb...	Matt...	Amo...	Credit	Paid (...)	Unpaid...	Sent?	Viewed
21/04/2022	28/04/2022	52	Ort...	21/...	\$14.00	\$0.00	\$0.00	\$14.00	<input type="checkbox"/>	<input type="checkbox"/>
06/04/2022	13/04/2022	50	Ma...	21-...	\$388.50	\$0.00	\$0.00	\$388.50	<input type="checkbox"/>	<input type="checkbox"/>
05/04/2022	12/04/2022	48	Jor...	21/...	\$1,673.5	\$0.00	\$0.00	\$1,673.50	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
05/04/2022	12/04/2022	46	Mc...	21/...	\$1,204.0	\$0.00	\$0.00	\$1,204.00	<input type="checkbox"/>	<input type="checkbox"/>
23/03/2022	30/03/2022	41	Edd...	187...	\$1,869.5	\$0.00	\$0.00	\$1,869.50	<input type="checkbox"/>	<input type="checkbox"/>
10/03/2022	29/03/2023	40	ABC...	21/...	\$1,668.5	\$0.00	\$0.00	\$1,668.59	<input type="checkbox"/>	<input type="checkbox"/>
24/01/2022	31/01/2022	26	Sa...	188...	\$300.00	\$0.00	\$0.00	\$300.00	<input type="checkbox"/>	<input type="checkbox"/>
09/12/2021	16/12/2021	18	Bea...	Will...	\$36.65	\$0.00	\$0.00	\$36.65	<input type="checkbox"/>	<input type="checkbox"/>
09/12/2021	16/12/2021	17	Ort...	21/...	\$24.93	\$0.00	\$0.00	\$24.93	<input type="checkbox"/>	<input type="checkbox"/>
09/12/2021	16/12/2021	16	Sa...	188...	\$1,106.0	\$0.00	\$0.00	\$1,106.00	<input type="checkbox"/>	<input type="checkbox"/>
09/12/2021	16/12/2021	15	Ort...	21/...	\$24.93	\$0.00	\$0.00	\$24.93	<input type="checkbox"/>	<input type="checkbox"/>
					\$13,976.12	\$0.00	\$0.00	\$13,976.12		

# How to edit, add & remove entries in an invoice

1. Open triConvey to display the dashboard.
2. Select the 'Billing' icon at the top of the dashboard.
3. Select the relevant matter.
4. Navigate to the 'Invoices' tab and open the invoice.
5. All relevant 'Time & Fees' and 'Expenses' displayed can be unchecked with the tick boxes.
6. Add additional entries via the 'Add Entry' hyperlinks in each section.
7. Hover the cursor over the left-hand side of the tick boxes to display the rearrange option.
8. Click and drag into your preferred order with the rearrange option.
9. Select the 'View' link at the end of each entry to make additional edits to the details.
10. Write Off any entries with the W/O tick boxes.
11. Preview the invoice with the 'View Preview' hyperlink on the right-hand side options bar.
12. Select 'Save Draft' once finished.

