triSearch®

Training Guide

# CREATING & EDITING INVOICES

- How to edit, add & remove entries in an invoice
- How to filter existing invoices
- How to edit, add & remove entries in an invoice
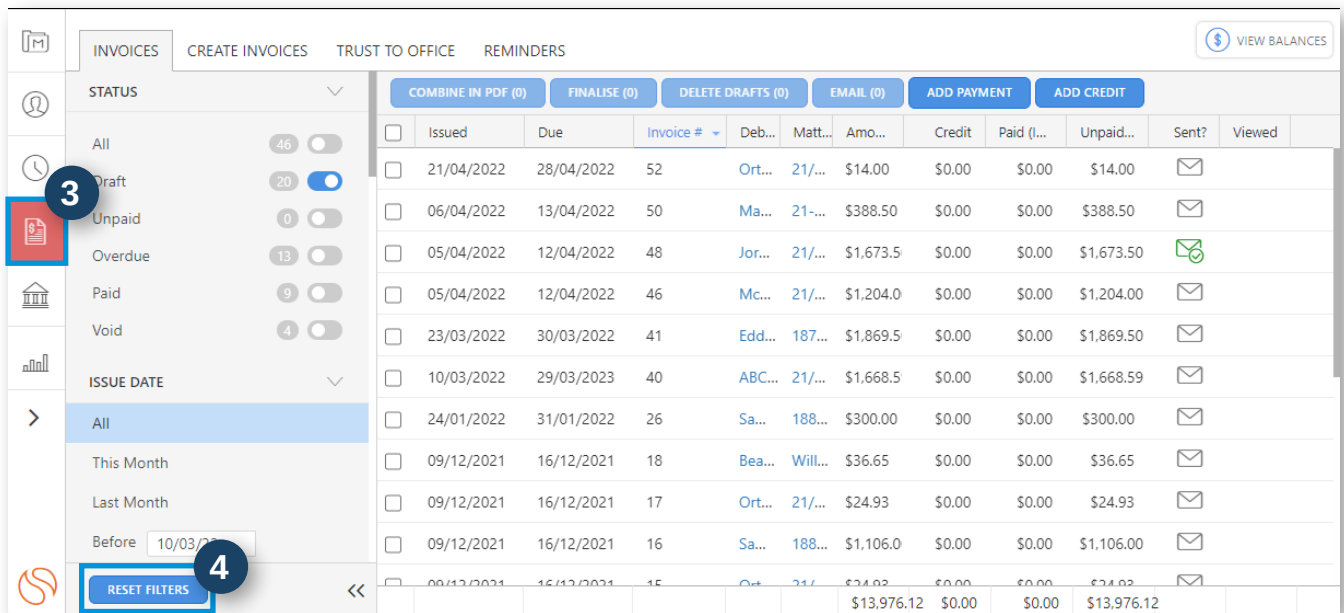
# How to create and format a new invoice

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.

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# 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.

# 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 curser 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.