

triSearch®

Training Guide

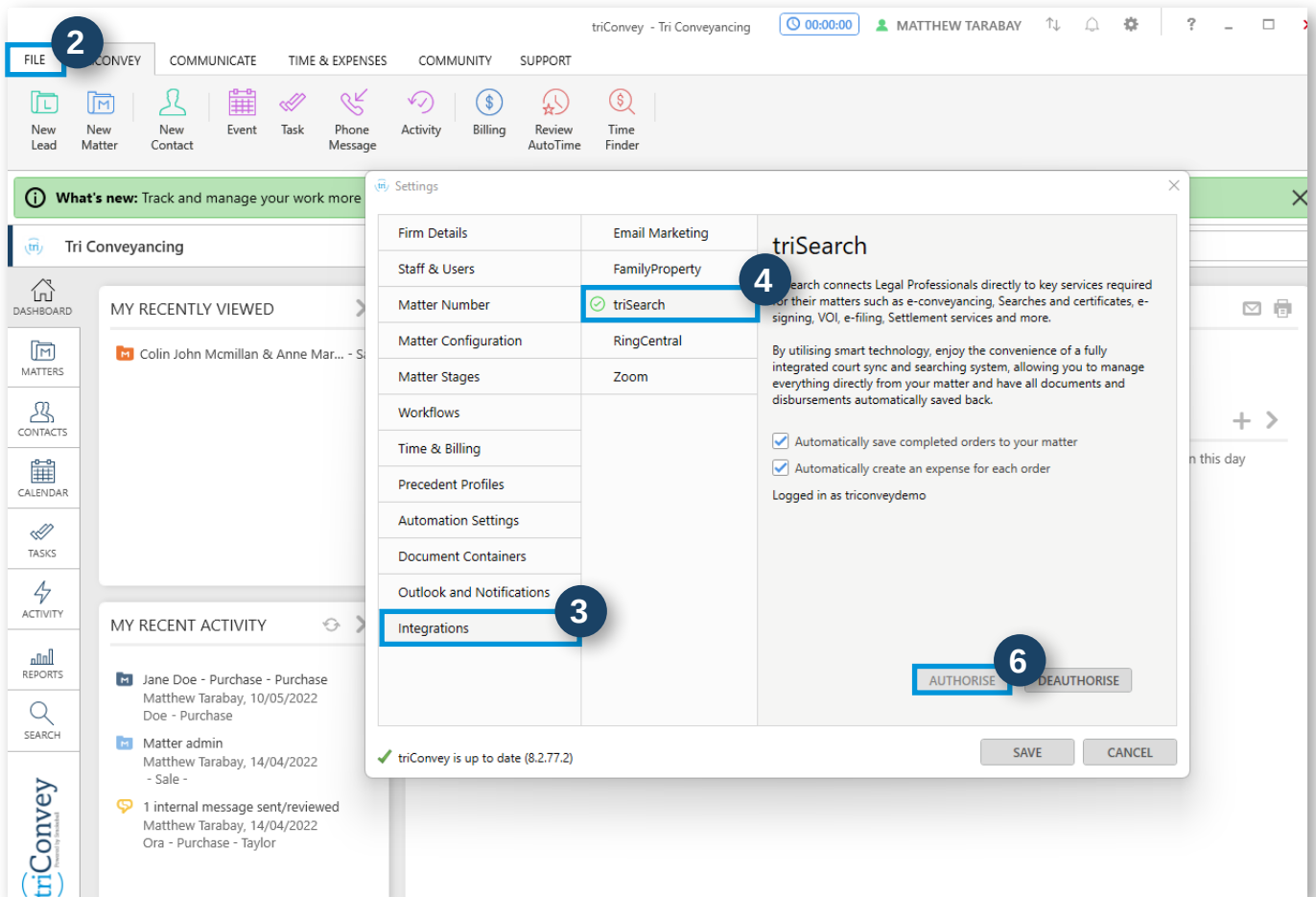
INTEGRATION MANAGEMENT

- How to set up integrated searching
- Reviewing search results
- Reviewing Search Orders in an Invoice

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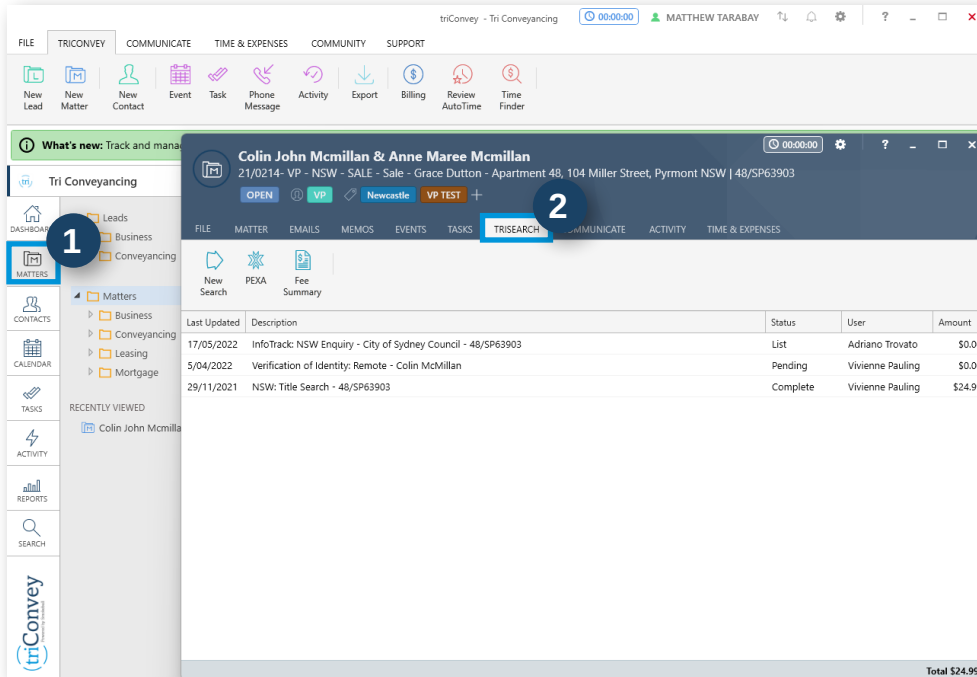
Integrated Searching

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 'Integrations' tab from the left-hand side.
4. In the next panel, select the 'triSearch' tab.
5. For complete integration, tick 'Automatically save completed orders to your matter' and 'Automatically create an expense for each order'.
6. Click 'Authorise' enter your username and password in the pop-up.
7. Select 'Save' once finished.



Reviewing Search Results

1. Open triConvey to display the Matters.
2. Select your intended matter and navigate to the triSearch icon.
3. All search dates, description, status, user order, and amount will be displayed.



Reviewing Search Orders in an Invoice

1. Select the 'Billing' icon from the triConvey dashboard.
2. Enter credentials if needed to access the Billing browser.
3. Select the Matter relevant to your intended invoice.
4. Access all ordered searches via the 'Expense' tab.

