# triSearch

Training Guide

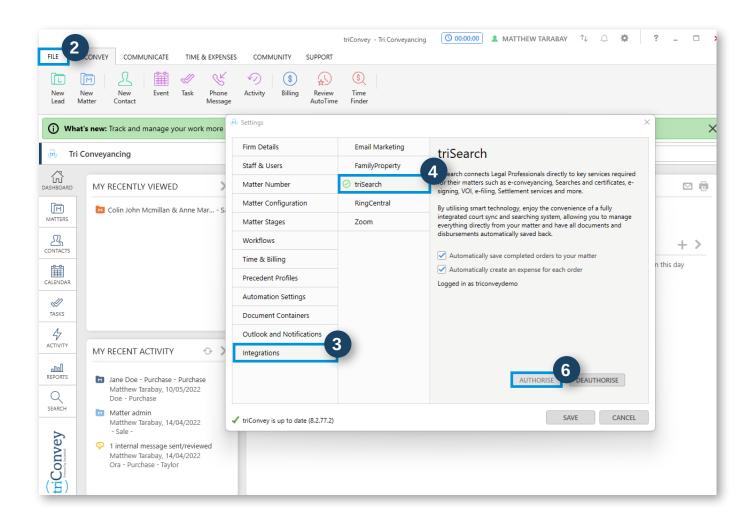
# INTEGRATION MANAGEMENT

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



#### **Integrated Searching**

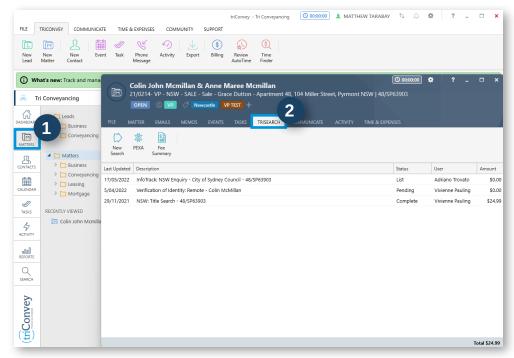
- 1. Open triConvey to display the dashboard.
- 2. Select the File tab in the top left corner and click on the triConvey settings option.
- 3. Select 'Integrations' tab from the left-hand side.
- 4. In the next panel, select the 'triSearch' tab.
- 5. For complete integration, tick 'Automatically save 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.

₽ Ω	Adams - Purchase     OPEN     @ EDIT MATTER  REF     21/2021     CUENTS John Adams				UNBILLED UNPAID \$680.00 \$45.10	OVERDUE \$45.10	CREDIT TRU \$50.00 \$0.0
D		) John Adams   michael.m	eaney@trisearch.com.a	u 0411 999 111			
	TIME & FEES EXPENSES COICES TRANSACTIONS						
	DATE STAFF ACTIVITY SUBJECT	QUANTITY PRICE	AMOUNT	GS 0 \$		TINC. BILL	ABLE ADD
nll	Date - Staff Subject	Quantity	Amount exc. GST	GST	Amount inc. GST	Billable?	Billed?
>	10/03/2022 WS Photocopying	10.00	\$30.00	\$3.00	\$33.00	~	
	05/11/2021 LC Review Contract	0.00	\$0.00	\$0.00	\$0.00	~	#32

