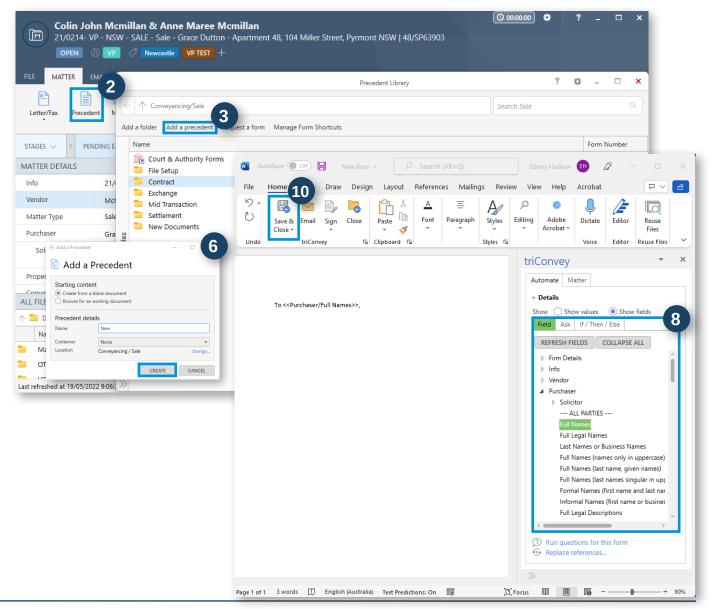# triSearch®

Training Guide

PRECEDENTS

- How to create a precedent

Creating a precedent

1. From the triConvey dashboard, enter the intended matter card.

2. Select 'Precedent' icon from the top action bar.

3. Select the Precedent folder you wish to save it in or create a new folder with the 'Add a folder' button.

4. Select 'Add a precedent' option.

5. Choose to create a blank document option and enter the required precedent details.

6. Once ready, select 'Create' and it will automatically open a blank Word Document

7. To enter automated fields, expand the triConvey toolbar on the right-hand side of the document.

8. Once your curser is in the intended population area, double click on a field to add the automation.

9. Repeat until completed.

10. Once finished, save and close the document. NOTE: this will now display in your intended Precedent folder and can be accessed from similar matter types.

11. To make permanent modifications at any time, right click on the precedent and select 'Modify' and 'Save' once finished.