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Training Guide

SETTING UP TRICONVEY

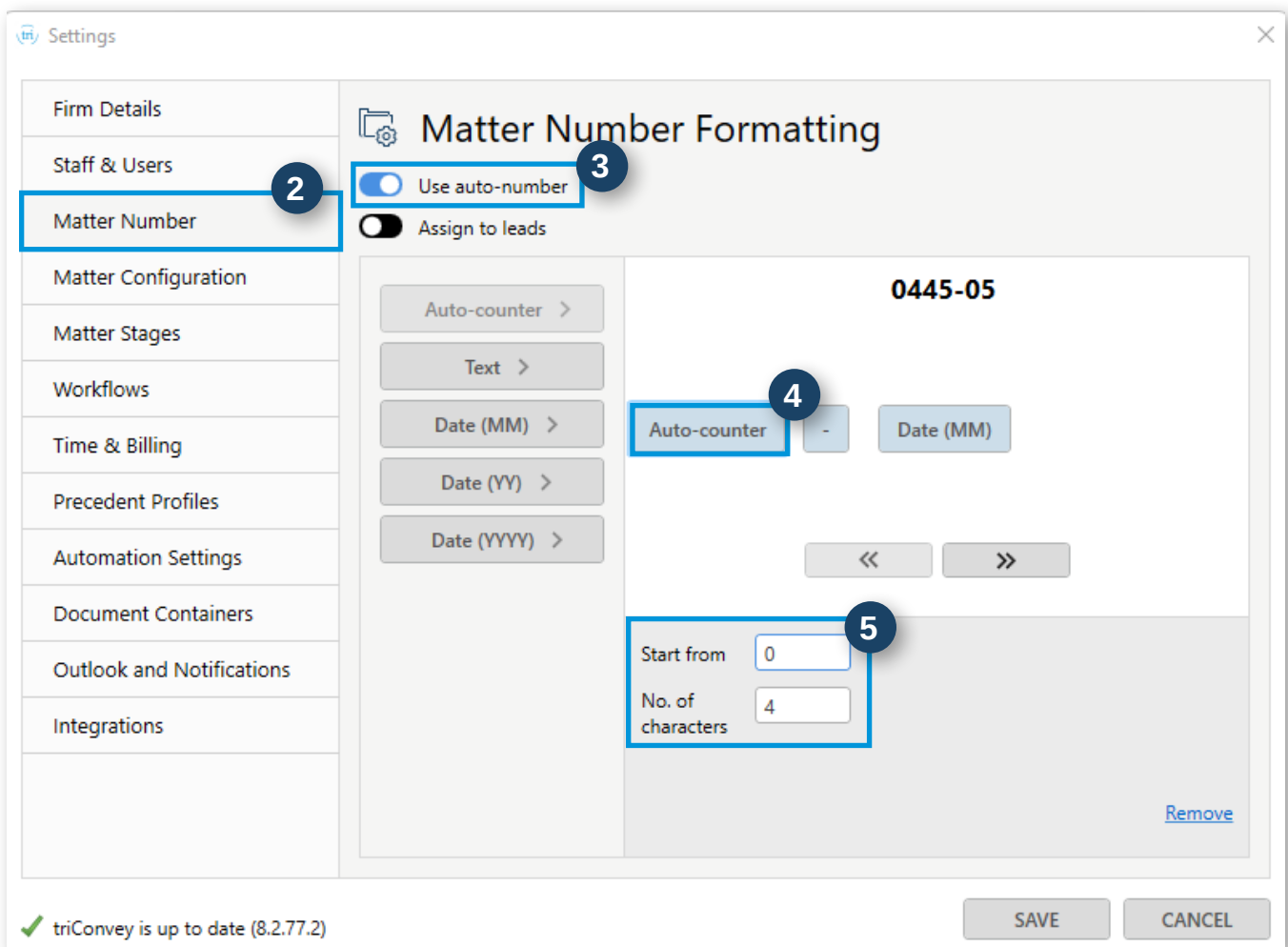- Add or remove a staff member
- Set up your auto-numbering

Add, Edit and Delete Users

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 'Staff & Users'.
4. To add a new staff member, select 'Add New' button, enter details and save. NOTE: A non-existing email will need to be used per user.
5. This will prompt a 'Welcome Email' to be sent to the new user's email to enter all login details.
6. To remove a staff member, right click the name you wish to edit and select 'Set as Former Staff'. Alternatively, open the Staff details and check the 'Former Staff' box.

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Auto Numbering

1. Follow steps 1 & 2 in 'Add, Edit and Delete Users'.
2. Select 'Matter Number'.
3. Click the 'Use auto-number' slider at the top to edit the fields.
4. Add the fields you wish you include and select 'Auto-counter'.
5. Enter the intended digits in the 'No. of characters' and 'Start from' fields. NOTE: We recommend 4 digits so it will display with three 0's then the first digit 1 initially. To start from '0001' enter 0 as the 'Start from' field.
6. To remove an item, highlight it and select 'Remove' in the bottom right.
7. Select the arrows to move each field to its intended order. NOTE: An automatic preview is displayed above the fields.
8. Select 'Save' once finished.