

triSearch®

Training Guide

# SETTING UP TRICONVEY

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

tri

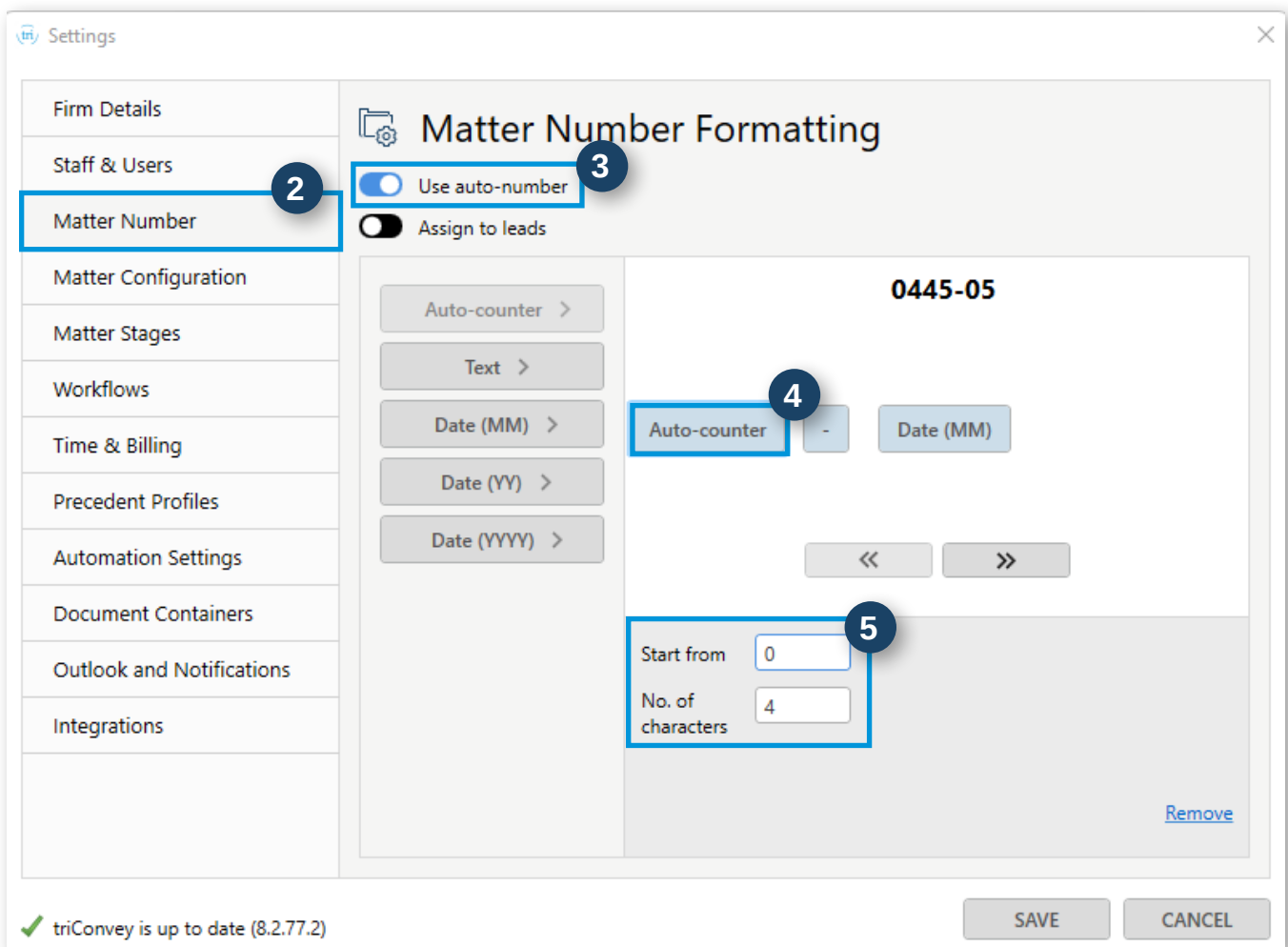
# Add, Edit and Delete Users

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.

The screenshot shows the 'Settings' application window. On the left, a sidebar menu has 'Staff & Users' selected, indicated by a blue circle with the number '3'. The main content area is titled 'Staff and Users' and contains an 'ADD NEW' button and a table of staff members. The table has columns for Name, Email, and 2FA. The row for 'Michael Meaney' is highlighted, and a context menu is open over it, showing options: 'Edit', 'Set as Former Staff', and 'Show Former Staff'. The 'Edit' option is highlighted, indicated by a blue circle with the number '6'. An 'Edit Staff Member' dialog box is overlaid in the foreground, showing a form for 'Staff member's details' with fields for Title, First Name, Middle Name, Last Name, Initials, Phone, Mobile, Email, and Role. There is also a 'Former Staff' checkbox and an 'Edit' button next to a profile picture placeholder. At the bottom of the dialog, there is an 'Access' section with a link to 'Enable triConvey Access for this user'.

# 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.



Settings

Firm Details

Staff & Users

**Matter Number**

Matter Configuration

Matter Stages

Workflows

Time & Billing

Precedent Profiles

Automation Settings

Document Containers

Outlook and Notifications

Integrations

**Matter Number Formatting**

Use auto-number

Assign to leads

Auto-counter >

Text >

Date (MM) >

Date (YY) >

Date (YYYY) >

**0445-05**

Auto-counter - Date (MM)

<< >>

Start from 0

No. of characters 4

Remove

SAVE CANCEL

✓ triConvey is up to date (8.2.77.2)