

triSearch®

Training Guide

TASKS

- How to create and use tasks

tri

Creating a new permanent task

1. Open triConvey to display the dashboard.
2. Select the 'Task' icon at the bottom of the dashboard.
3. Enter the details.
4. Select 'Save' once finished.

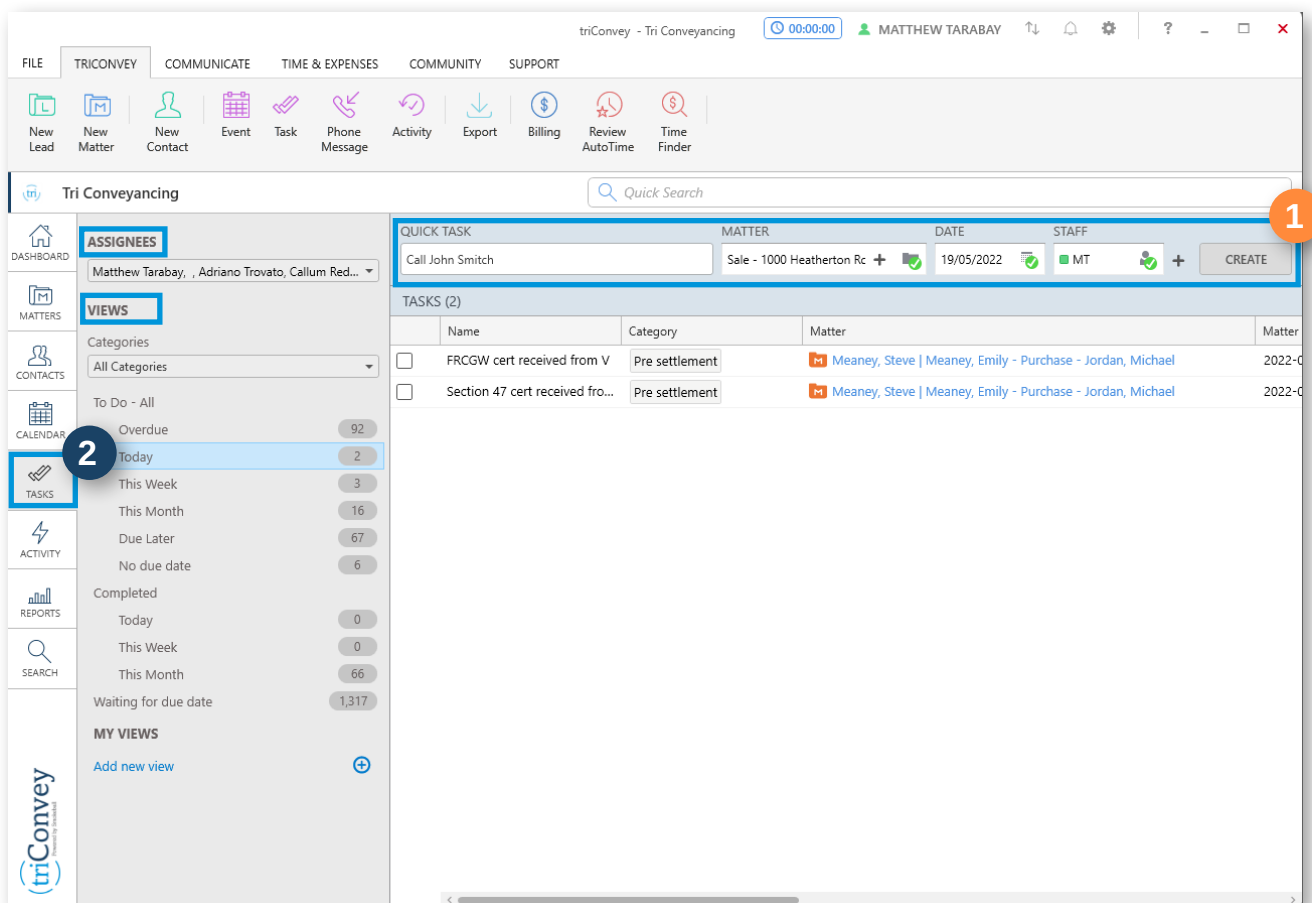
The screenshot displays the triConvey dashboard with the 'New Task' form open. The dashboard includes a top navigation bar with tabs for FILE, TRICONVEY, COMMUNICATE, TIME, EXPENSES, COMMUNITY, and SUPPORT. Below this is a row of icons for New Lead, New Matter, New Contact, Event, Task, Phone Message, Activity, Billing, Review AutoTime, and Time Finder. The 'Task' icon is highlighted with a blue box and a '2' in a circle. The 'New Task' form is titled 'New Task' and contains the following fields: Name (text input), Assigned to (dropdown menu showing 'Matthew Tarabay'), Categories (text input), Due (date picker), Matter (text input with a 'BROWSE' button), and Details (text area). The form also includes a 'Duration' field with '0.00 Hrs Units' and a 'SAVE' button at the bottom right, which is highlighted with a blue box and a '4' in a circle. A message on the right side of the form states: 'A matter needs to be assigned before a document can be selected'.

Finding existing tasks

1. Open triConvey to display the dashboard.
2. On the left-hand side of the menu, select 'Tasks' icon.
3. To see other user tasks, select the drop-down in the 'Assignees' option, and choose the appropriate user.
4. Task categories can be filtered by type and urgency under the 'Views' menu.

Creating a new one-off task from view page

- Repeat Steps 1 & 2 from 'Finding existing tasks'
1. At the top of the viewing section, enter a name in the 'Quick task' field.
 2. Assign it to a matter in the 'Matter' field.
 3. Select a completion date and assign it to any user in the following fields.
 4. Select 'Create' once finished.



The screenshot shows the triConvey web application interface. The top navigation bar includes 'FILE', 'TRICONVEY', 'COMMUNICATE', 'TIME & EXPENSES', 'COMMUNITY', and 'SUPPORT'. Below this is a toolbar with icons for 'New Lead', 'New Matter', 'New Contact', 'Event', 'Task', 'Phone Message', 'Activity', 'Export', 'Billing', 'Review AutoTime', and 'Time Finder'. The main content area is titled 'Tri Conveyancing' and features a 'Quick Search' bar. On the left sidebar, the 'TASKS' icon is highlighted with a red circle and the number '2'. The main task view shows a 'QUICK TASK' form with fields for 'Name' (Call John Smith), 'MATTER' (Sale - 1000 Heatherton Rc), 'DATE' (19/05/2022), and 'STAFF' (MT). A 'CREATE' button is visible. Below the form is a table of existing tasks:

Name	Category	Matter	Matter
<input type="checkbox"/> FRCGW cert received from V	Pre settlement	Meaney, Steve Meaney, Emily - Purchase - Jordan, Michael	2022-C
<input type="checkbox"/> Section 47 cert received from...	Pre settlement	Meaney, Steve Meaney, Emily - Purchase - Jordan, Michael	2022-C

Adding a custom task view

1. Repeat Steps 1 & 2 from 'Finding existing tasks'
2. Select the 'Add new view' hyperlink at the bottom of 'My Views' menu.
3. Enter the details.
4. Select 'Apply View' followed by 'Add to my views'.

