

triSearch®

Training Guide

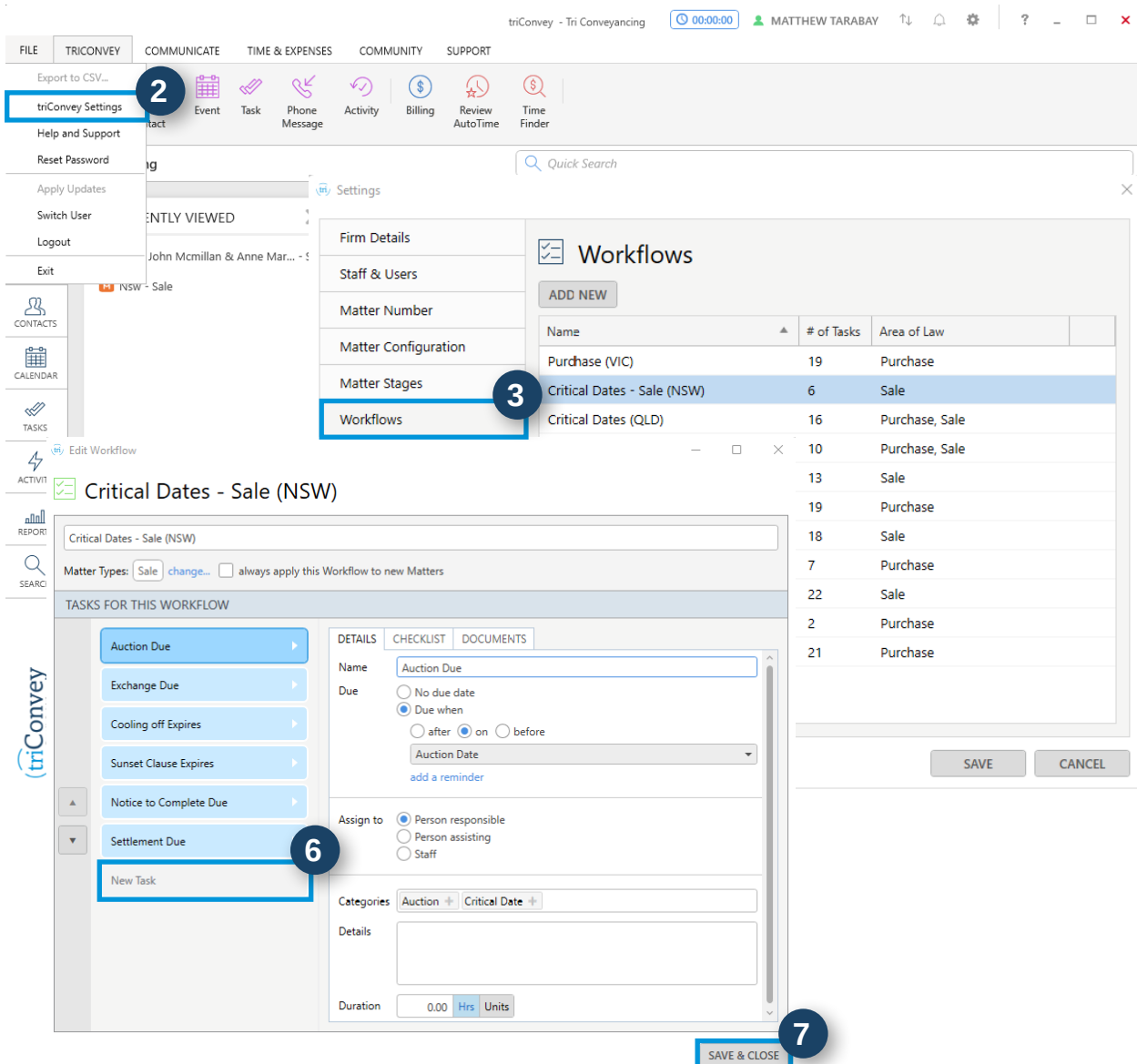
WORKFLOWS

- How to navigate workflows

tri

Locate and edit existing workflows

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 'Workflows' tab from the left-hand side.
4. Double click on the workflow you wish to edit.
5. Enter the intended details. NOTE: Precedent documents can be assigned to a specific workflow through the 'Documents' tab.
6. To add a new task, scroll to the bottom of the workflow tasks and select 'New task'.
7. Enter the details and select 'Save'. NOTE: You can reorder the new task with the arrows on the left-hand side.



Creating a custom workflow

1. Repeat Steps 1 to 3 from 'Locate and edit existing workflows'.
2. Select 'Add New' button under 'Workflows' title.
3. Enter a workflow name in the top detail field.
4. Assign the new workflow to a specific matter type with the 'change...' hyperlink.
5. Select whether to apply the new workflow to all new matters.
6. To add a new task, follow Steps 6 & 7 in 'Locate and edit existing workflows'.
7. Select 'Save & Close' button 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

triConvey is up to date (8.2.77.2)

Workflows

ADD NEW

Name	# of Tasks	Area of Law
Purchase (VIC)	19	Purchase
Critical Dates - Sale (NSW)	6	Sale
Critical Dates (QLD)	16	Purchase, Sale
Critical Dates (VIC)	10	Purchase, Sale
Sale (QLD)	13	Sale
Purchase (VIC)	10	Purchase

New Matter

New Matter

Matter Types: all [change...](#) always apply this Workflow to new Matters

TASKS FOR THIS WORKFLOW

Task 1

New Task

DETAILS CHECKLIST DOCUMENTS

Name: Task 1

Due: No due date Due when

Assign to: Person responsible Person assisting Staff

Categories:

Details:

Duration: 0.00 Hrs Units

SAVE & CLOSE