

triSearch®

Training Guide

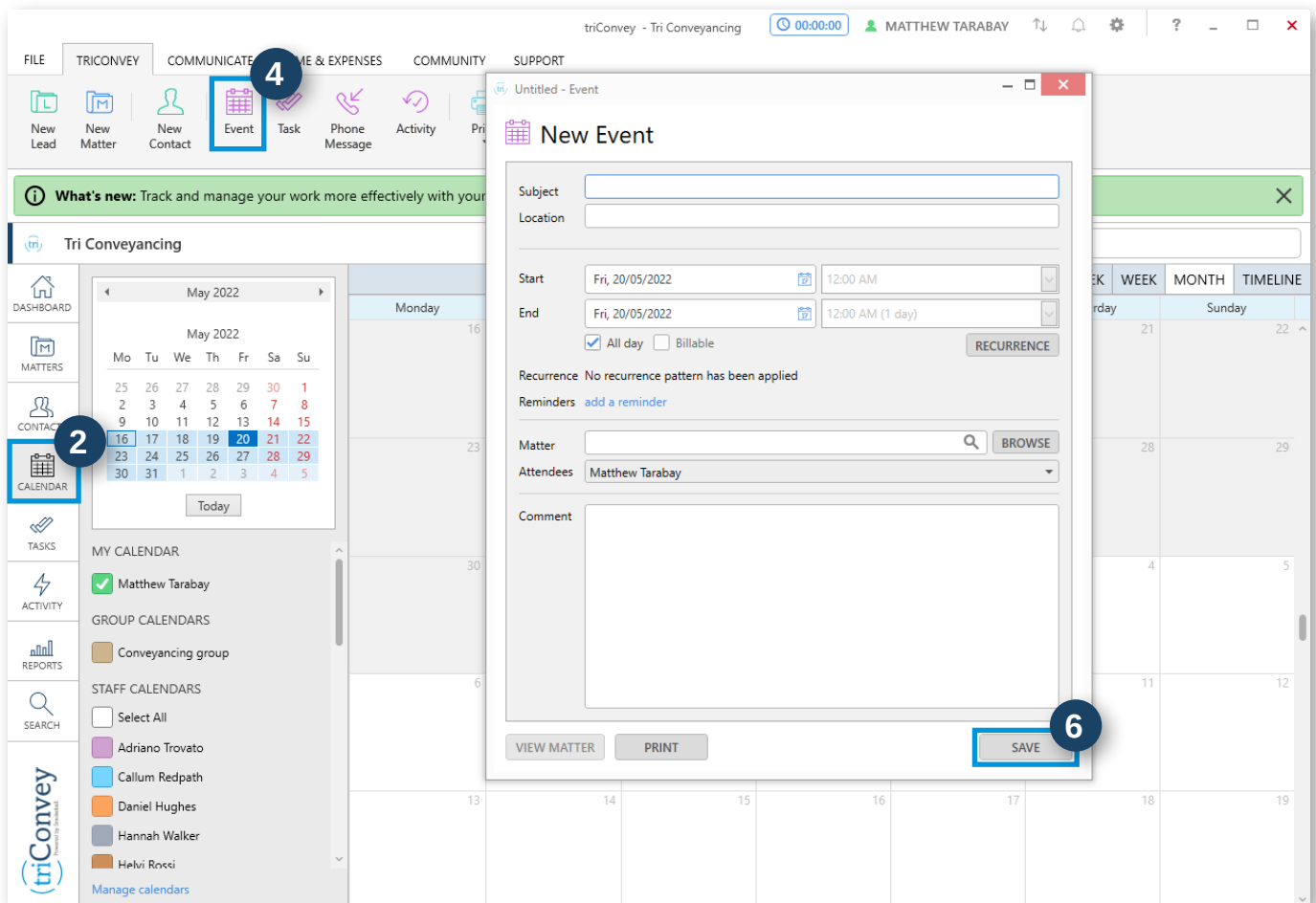
TRICONVEY CALENDAR

- Entering a standalone event
- Creating a critical event within a matter

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How to enter a standalone event

1. Open triConvey to display the dashboard.
2. Select the 'Calendar' icon on the left-hand menu.
3. A standalone event can be entered in two methods.
4. The first, by selecting the 'Event' tab in the top menu.
5. The second, by selecting the intended event date in the Calendar.
6. Enter event details and select 'Save' when finished.
7. This will only save the event to the user's Microsoft Outlook and triConvey calendar unless multiple attendees are added.



How to create an event within a matter

1. From your dashboard, navigate to the 'Matters' tab on the left-hand side.
2. Open the matter you wish to create an event for.
3. Double-click on the 'Conveyancing Details' field.
4. Enter in the selected dates for exchange and settlement as well as any other critical dates.
5. Once the events have been entered, select the 'Update Events' button.
6. Confirm your dates and times.
7. Select which user calendars you wish to add the events to and select 'Update' once finished.
8. Select 'Okay' button to close the 'Conveyancing Details' pop-up and the event will be saved in your calendar.

