triSearch

Training Guide

EMAIL INTEGRATION

- How to use email integration
- How to add attachments or received emails to a matter from Outlook



How to use email Integration

- 1. Open an intended matter from the triConvey Dashboard.
- 2. Navigate to the 'Email' tab at the top of the matter card.
- 3. Choose your intended Send column between 'To:', 'CC:', & 'BCC:'.
- 4. Select the '+ ADD' icon to add a contact to the send column, then select 'Next'.
- 5. An email window will automatically open with the parties involved.
- 6. Enter your body text.
- 7. Add attachments using the 'Attach...' button in the integration bar at the bottom of the email window. NOTE: Here, you have the ability to combine and re-order multiple documents into one PDF file.
- 8. Add additional email recipients if needed with the 'Send To...' button in the integration bar.
- 9. Select 'Send' when ready. NOTE: This will automatically capture into the related matter card.
- 10. To view all email correspondence in correlation to the matter, select the 'Emails' tab at the top of the matter card.

			Colin John Mcmillan & Ann 21/0214- VP - NSW - SALE - Sale - OPEN @ VP ? Newcastle			e Maree Mcmillar	(B) Email								
							🗹 Email to:								
								PARTIES						î	
									John McMillan - Vendo m@gmail.net	or					
			Letter/Fax Precedent Memo Message		imail Import Scar	a + ADD Anne Marce McMillan - Vendor annem@gmail.net									
			STAGES V S PENDING EXCHANGE / NEGOTIATION EXCHAN					WIT + ADD Grace Dutton - Purchaser viv@nextac.com.au							
			MATTER DETAILS						+ ADD iSettle Pty Ltd - Purchaser's Solicitor ettle.com.au						
			Info 21/0214- VP - NSW - SALE - VP/VP					4							
	Vendor McMillan, Colin J. and An					ne M.	+ ADD viv@isettle.com.au - Director at iSettle Pty Ltd								
	Matter Type Sale							+ ADD Mar	el Real estate - Vendor	's Agent					
			Purchas		Grace Du			viv@	nextac.com.au					~	
_		roperty: Apartment				♀ Search				o x					
	Insert Calibri (E	Options Forma			ecast Acrobat	0 10					-				
り <u>ロ</u> X ひ Paste ゆ	BI		A	Address Check Book Names	©Link ∽	Request Attach in	stant Assign Dictate	Editor Immersive	iew Viva View		_			_	
Undo Clipboard Fa	<u>^</u> ~.	A ~ = = = Basic Text	Pip Fa	Names	Signature ~ Include	Signatures file lin Adobe Acrobat	k of Select attachments								
	rom 🗸	ebony.hudson@tris	earch com au				Ø Select attachment	5	Search					NEXT	
	To	viv@isettle.com.au					Select All Combine file					_			
	Cc	www.settle.com.au	e.com.au				Documents Original of Documents		Date modified	Author	Ô				
	Bcc						- Marketing 🕞 🔛	Transfer	15/01/2022 12:36					_	
							VOI & CAC		e (detai 21/12/2021 11:28		ds & Exports	23/05/2022	 Matthew Tarabay 	• •	
	Subject	McMillan Sale to D	utton Property: P	Apartment 48, 104 P	tiller street, Pyrmor				with C 8/12/2021 12:59 P with C 8/12/2021 12:56 P	M Vivienn					
									illan Sale 8/12/2021 12:42 P						
									narketi 8/12/2021 12:40 P						
								Communicate Inform	ation S 6/12/2021 6:52 AN	4 Vivienn ≚					
							Show emails								
								SHARE FILE(S) VIA SECU	E LINK ATTACH 0 FILES	CANCEL					
									7						
tri) McMillan, C	Colin Me	cMillan, Anno -	Sale - Dutton	n, Grace - 21/02	14- VP - NSW -	SALE - VP/VP		VIEW MATTER	ATTACH	ND TO ×					



How to add attachments or received emails to a matter from Outlook

- 1. Open the email once it has been received.
- 2. Type the client's name or matter number into the triConvey integration bar across the bottom.
- 3. Select the correct matter from the drop-down menu. NOTE: A pop-up will automatically select all email attachments.
- 4. Select or deselect the files you wish to attach and enter 'Attach' when ready. NOTE: All attachments and email will populate into the files of the matter card.

Matter 306 : Important Info - Message (HTML)						Search					_		×
File Message Help Mimecast Acrobat													
× Delete ~	← Respond ~	Share to Teams Teams	Quick Steps ~ Quick Is	Move V	Tags	ې Editing	Immersive V	Translate Language	Zoom	Send to OneNote OneNote	View Salesforce	Viva Insights Add-in	~
Matter 306 : Important Info Info To Ebony Hudson Mon 23/05/2022 11:38 AM													
Hi, Please	e attached ti									IVI	on 23/03/20	122 TT:38 AIV	
Thank													
													2
(tri)	john ada											BROWSE	
	 OPEN MATTERS (2) 21/2021 - John Adams - Purchase - Paul Thomas 12 Jacobs Street, Glenelg SA Opened 4/11/2021 												
) - John Adar /10/2021 📒		artment 5, 55	Hawsburg	y Avenue, F	Prramatta NSW						

