

triSearch®

Training Guide

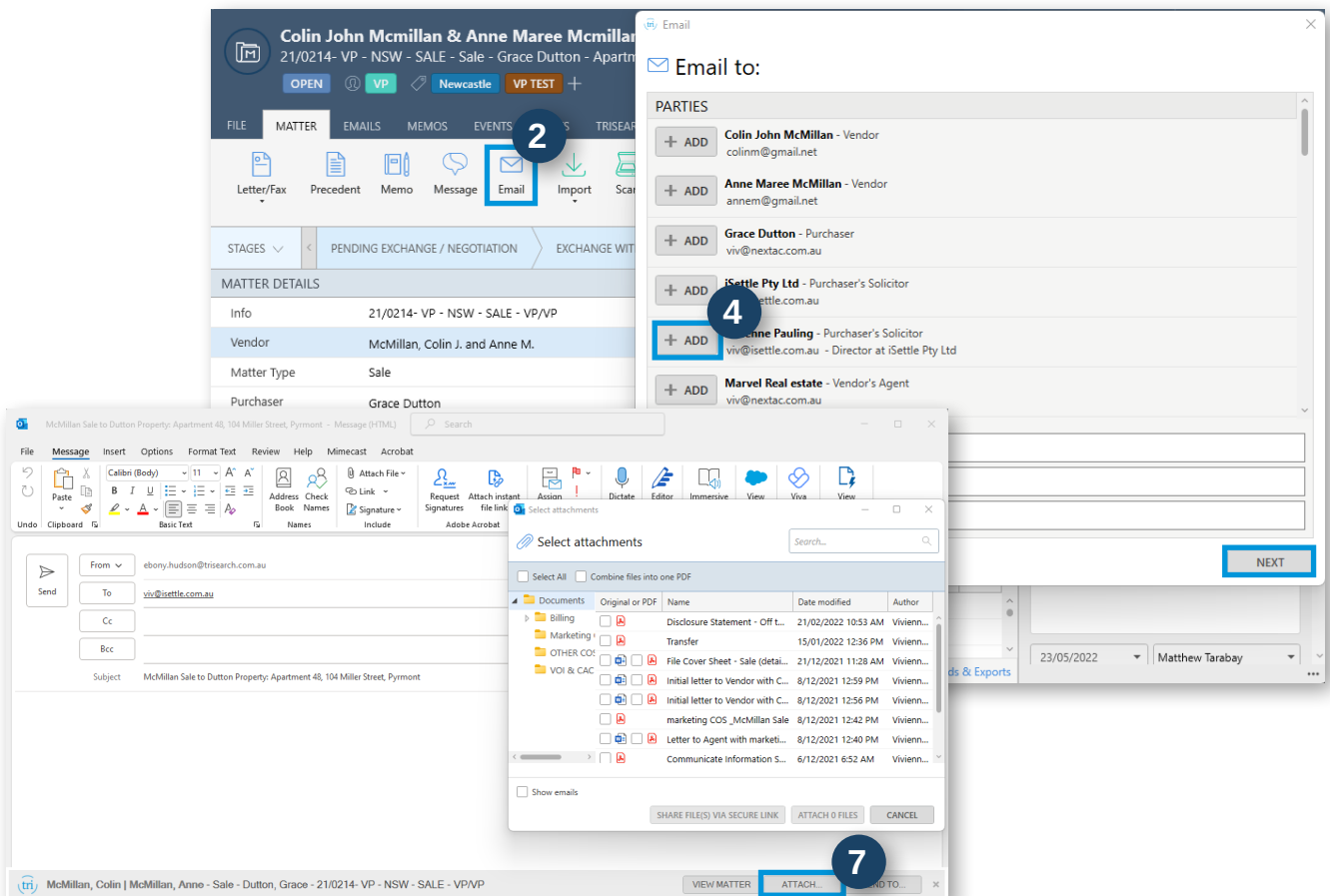
EMAIL INTEGRATION

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

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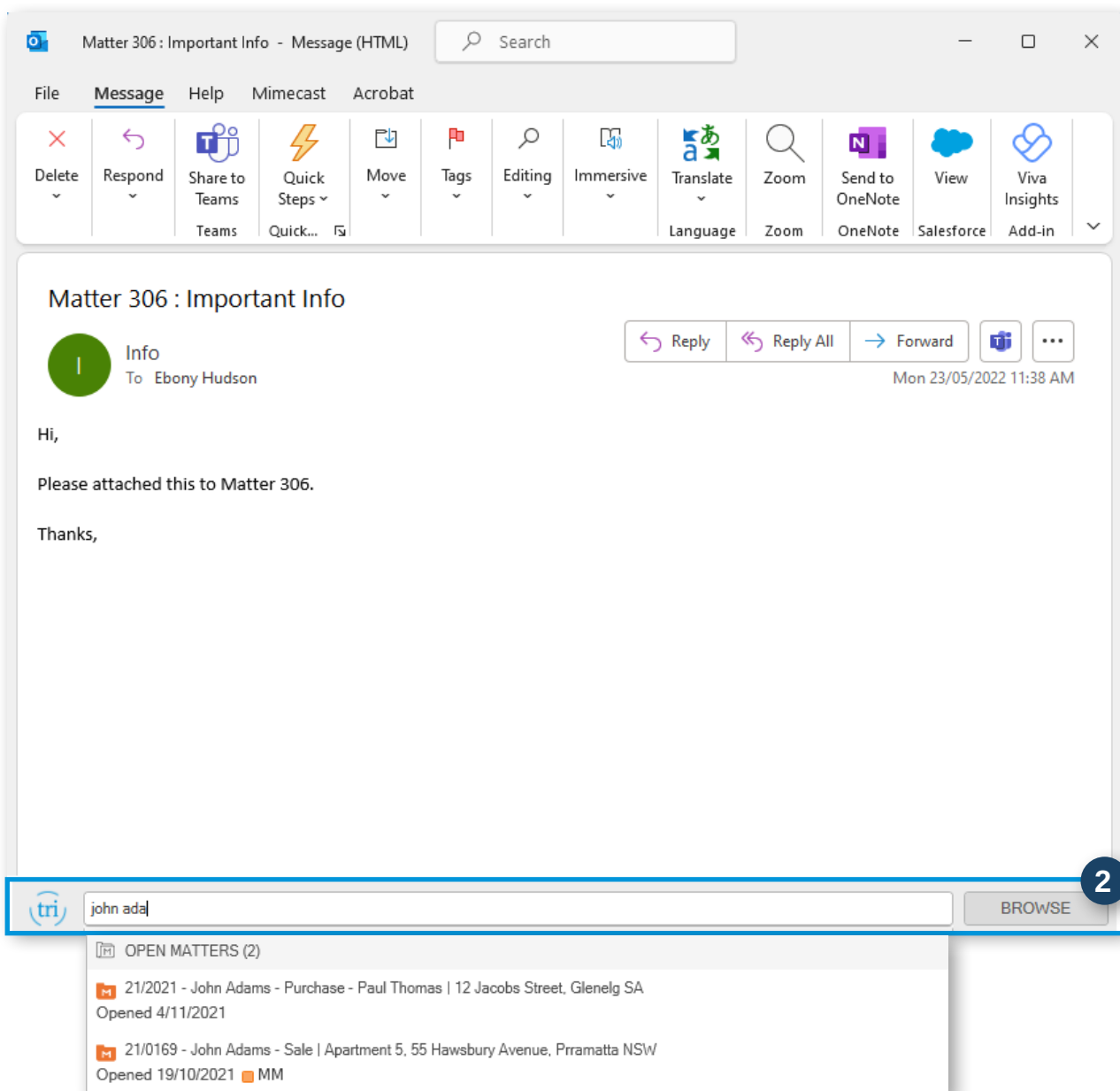
How to use email Integration

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.



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.



The screenshot shows an Outlook window titled "Matter 306: Important Info - Message (HTML)". The email content is as follows:

Matter 306 : Important Info

Info
To: Ebony Hudson

Hi,

Please attached this to Matter 306.

Thanks,

Mon 23/05/2022 11:38 AM

At the bottom of the Outlook window, there is a triConvey integration bar. It contains a search input field with the text "john adal" and a "BROWSE" button. A dropdown menu is open below the search field, showing two matter cards:

- OPEN MATTERS (2)
- 21/2021 - John Adams - Purchase - Paul Thomas | 12 Jacobs Street, Glenelg SA
Opened 4/11/2021
- 21/0169 - John Adams - Sale | Apartment 5, 55 Hawsbury Avenue, Prramatta NSW
Opened 19/10/2021 MM

A blue circle with the number "2" is overlaid on the right side of the integration bar.