

triSearch®

Training Guide

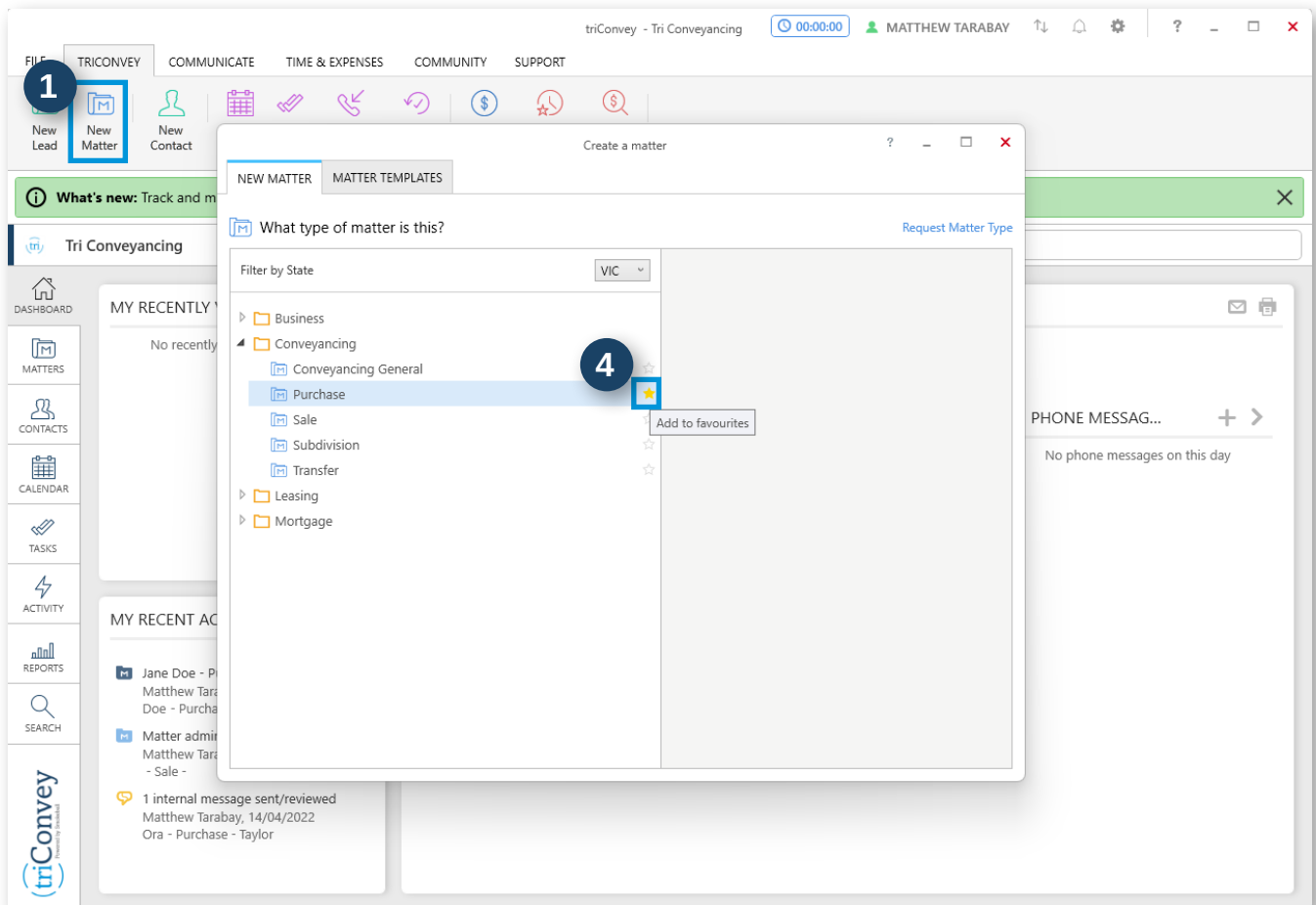
MATTER MANAGEMENT

- Create matter type favourites
- Create a new matter
- Adding multiple clients with same address that require correspondence together
- Adding multiple clients at separate addresses who require individual correspondence
- Adding separate trust information

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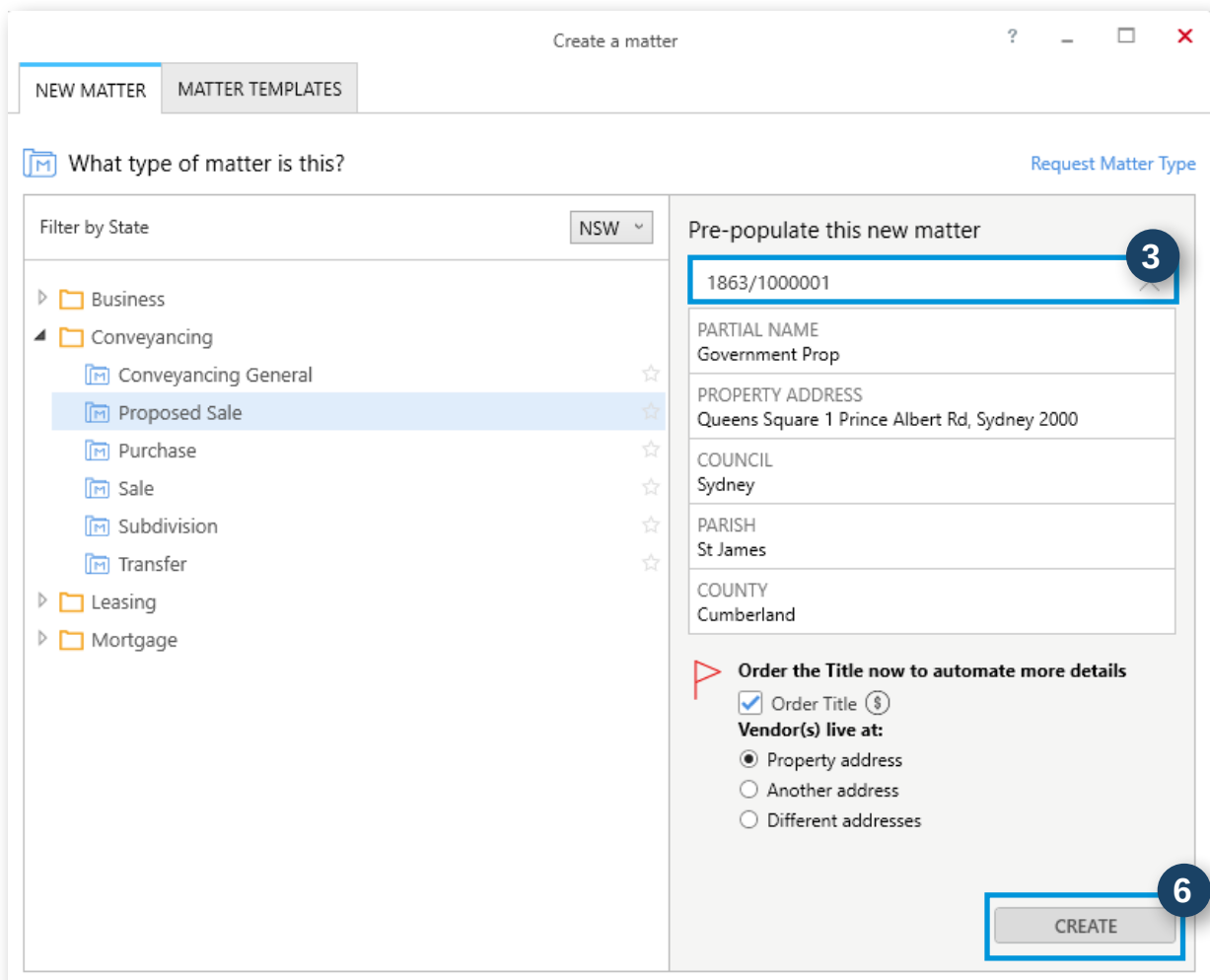
Custom matter type favourites

1. Open triConvey to display the dashboard.
2. Navigate to the 'New Matter' tab at the top of the dashboard.
3. Choose your State of Conveyancing then select 'Conveyancing' drop down.
4. Select the star icon at the right of the chosen Matter type to save it to favourites.
5. Repeat step 3 & 4 for additional State matter types.



Creating a new matter

1. Follow steps 1 & 2 from 'Custom matter type favourites'.
2. Select your intended matter type.
3. Enter the Title Reference or an Address in 'Pre-populate this new matter' field.
4. (If in NSW & Victoria) Additional details will automatically display to validate the matter, including Partial Name, Property Address, Council, Parish, & County.
5. (If in NSW) Enter an additional eCOS ID to add an existing triSearch Contract of Sale related to the Title Reference.
6. If details are correct, select 'Create' and confirm the workflow chosen for that matter type before entering additional matter details.



Create a matter

NEW MATTER MATTER TEMPLATES

What type of matter is this? [Request Matter Type](#)

Filter by State: NSW

- Business
- Conveyancing
 - Conveyancing General
 - Proposed Sale**
 - Purchase
 - Sale
 - Subdivision
 - Transfer
- Leasing
- Mortgage

Pre-populate this new matter

1863/1000001

PARTIAL NAME
Government Prop

PROPERTY ADDRESS
Queens Square 1 Prince Albert Rd, Sydney 2000

COUNCIL
Sydney

PARISH
St James

COUNTY
Cumberland

Order the Title now to automate more details

Order Title \$

Vendor(s) live at:

Property address

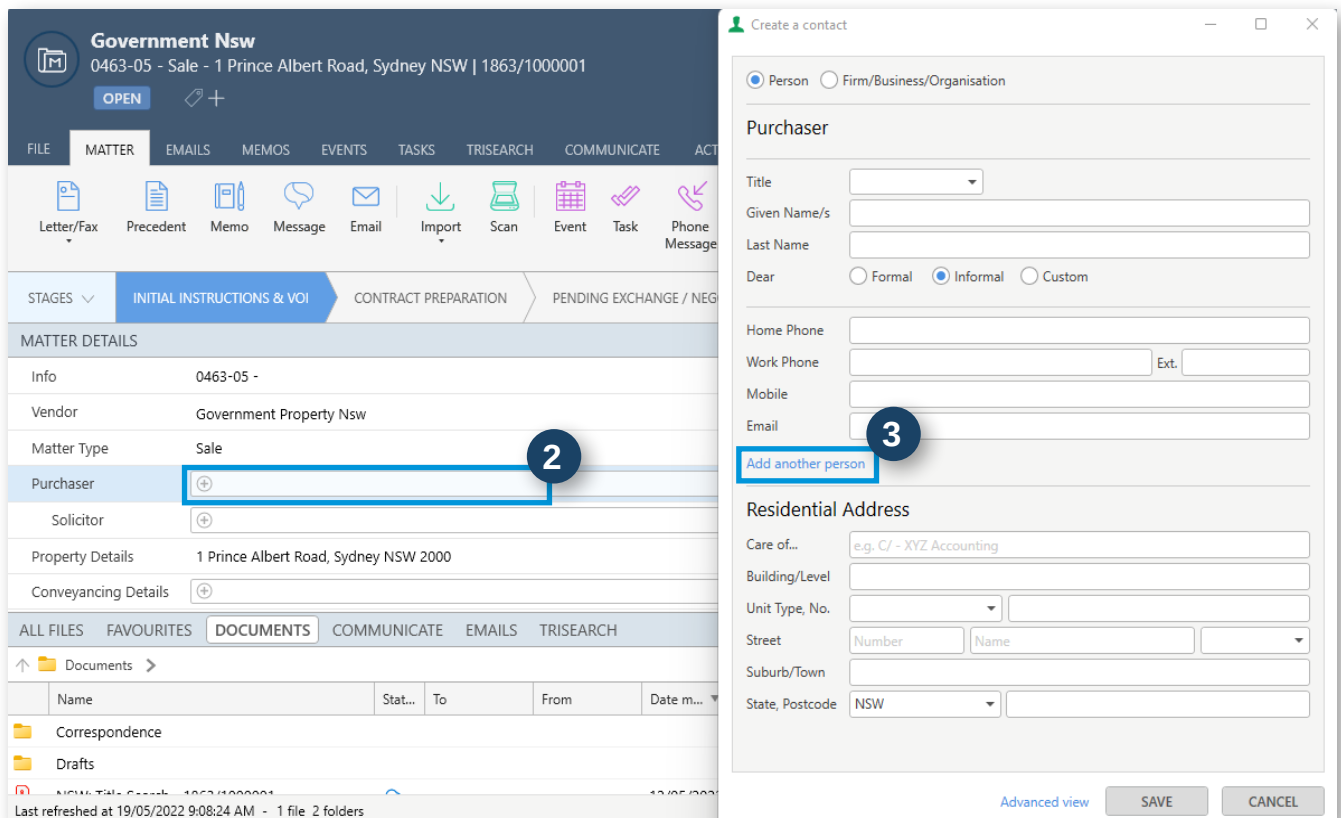
Another address

Different addresses

CREATE

Add multiple individuals with same address to a matter

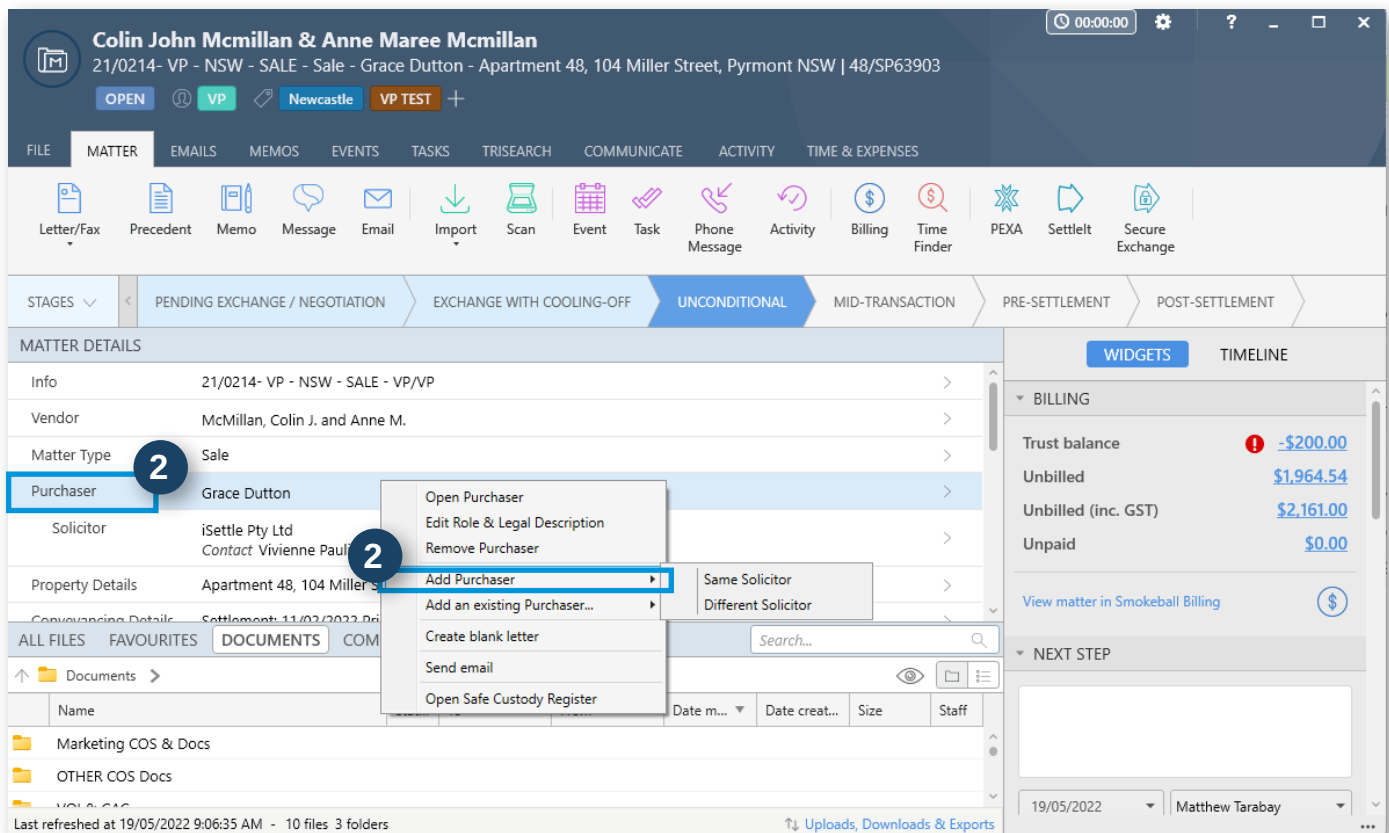
1. Open the relevant matter card.
2. Select '+' icon and add the purchaser details.
3. Select 'Add another person' hyperlink above 'Residential Address'.
4. Enter details and select 'Save'. NOTE: The same process can be repeated for the Vendor if needed.



The screenshot displays the triConvey interface for a matter titled "Government Nsw". The matter details include "0463-05 - Sale - 1 Prince Albert Road, Sydney NSW | 1863/1000001". The "Purchaser" field in the "MATTER DETAILS" section is highlighted with a blue box and a circled "2", indicating the step to click the "+" icon to add a purchaser. The "Create a contact" form is open, showing the "Purchaser" section with fields for Title, Given Name/s, Last Name, Dear (Formal, Informal, Custom), Home Phone, Work Phone, Mobile, and Email. The "Add another person" link is highlighted with a blue box and a circled "3", indicating the step to click this link to add another person. The "Residential Address" section includes fields for Care of..., Building/Level, Unit Type, No., Street (Number, Name), Suburb/Town, and State, Postcode.

Add multiple individuals with individual address to a matter

1. Open the relevant matter card.
2. Right click 'Purchaser' or 'Vendor' field, then hover 'Add Purchaser' or 'Add Vendor' and choose either the 'Same Solicitor' or 'Different Solicitor' button.
3. Enter relevant details and select 'Save'. NOTE: There is no limit to the number of parties you can add, simply repeat Steps 1 - 3.



The screenshot displays the triConvey software interface for a matter titled "Colin John Mcmillan & Anne Maree Mcmillan". The matter details table is as follows:

Field	Value
Info	21/0214- VP - NSW - SALE - VP/VP
Vendor	McMillan, Colin J. and Anne M.
Matter Type	Sale
Purchaser	Grace Dutton
Solicitor	iSettle Pty Ltd Contact Vivienne Paul
Property Details	Apartment 48, 104 Miller S
Conveyancing Details	Settlement: 11/03/2022 Pri

The right-hand sidebar shows the following information:

- BILLING**
 - Trust balance: -\$200.00
 - Unbilled: \$1,964.54
 - Unbilled (inc. GST): \$2,161.00
 - Unpaid: \$0.00
- NEXT STEP**
 - Date: 19/05/2022
 - Staff: Matthew Tarabay

Adding separate Trust information

1. Repeat Steps 1 - 3 above until all parties accounted for.
2. Right click on individual and select 'Edit Role & legal Description'.
3. Enter Trustee information.
4. Select 'Save' once finished.
5. Repeat process for all parties if needed.

The screenshot displays the triConvey software interface for a matter titled "Colin John Mcmillan & Anne Maree Mcmillan". The interface shows a navigation bar with various tabs like "FILE", "MATTER", "EMAILS", etc. Below this is a toolbar with icons for actions like "Letter/Fax", "Precedent", "Memo", etc. The main area is divided into "STAGES" and "MATTER DETAILS". The "MATTER DETAILS" section shows information about the matter, including the vendor, matter type, purchaser, and solicitor. A context menu is open over the "Purchaser" field, with the "Edit Role & Legal Description" option highlighted. A dialog box titled "Role & Legal Description overrides" is open, showing fields for "Descriptor", "Role", and "Legal Description", each with an "Override" checkbox. A "SAVE" button is visible at the bottom right of the dialog box. Red circles with numbers 2 and 3 highlight the "Edit Role & Legal Description" option and the "SAVE" button, respectively.