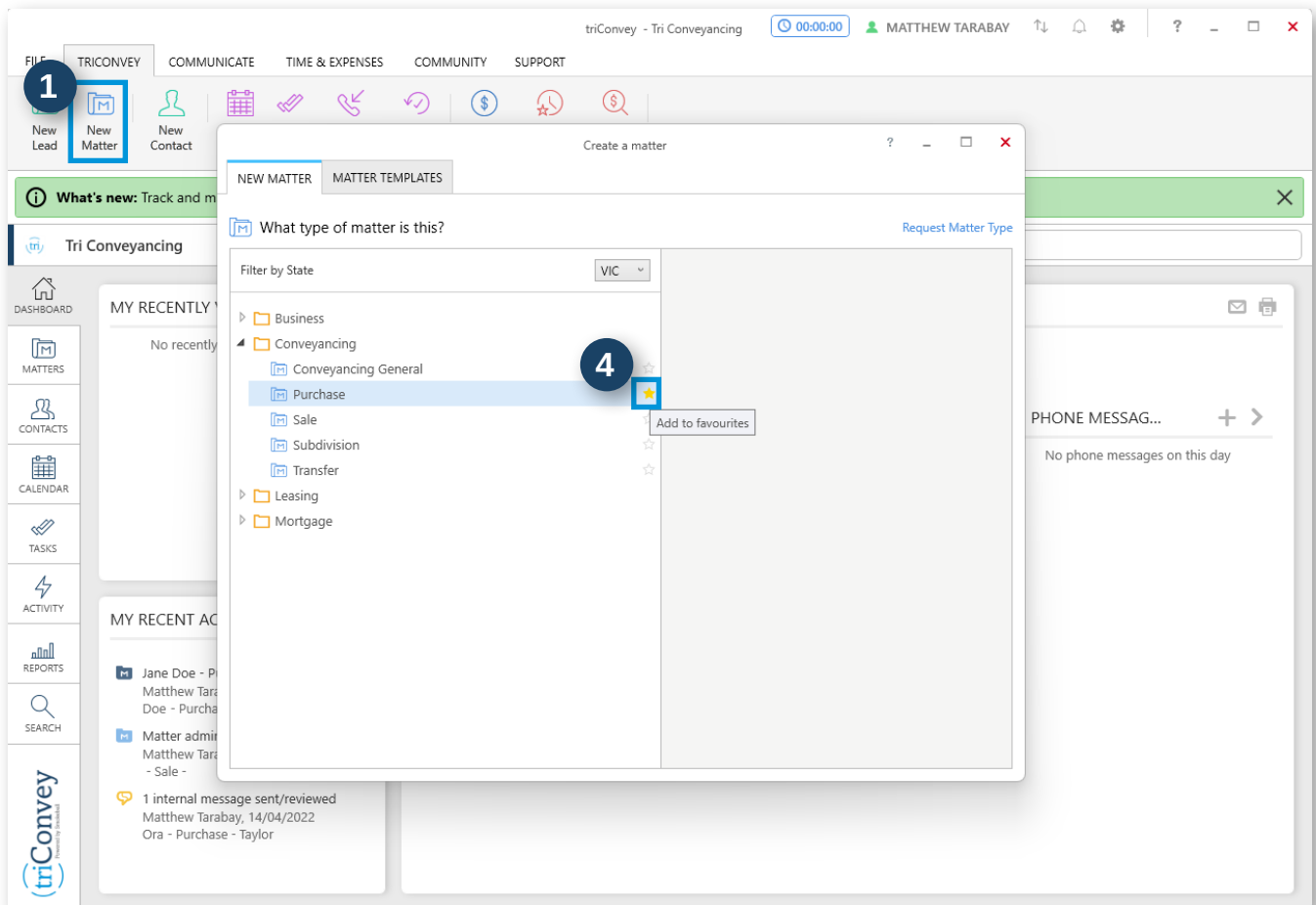# triSearch®

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
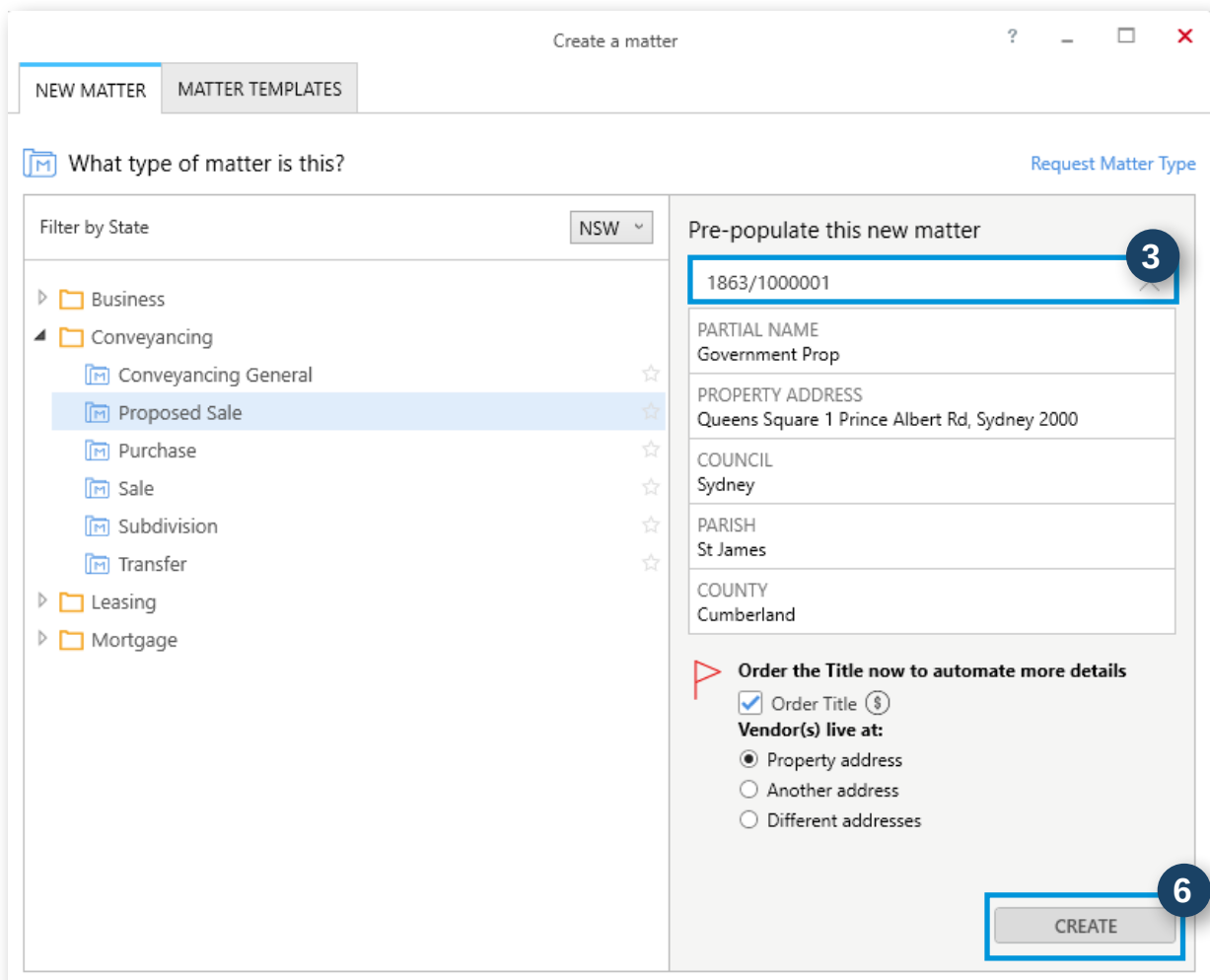- Adding separate trust information

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.

(triConvey

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.
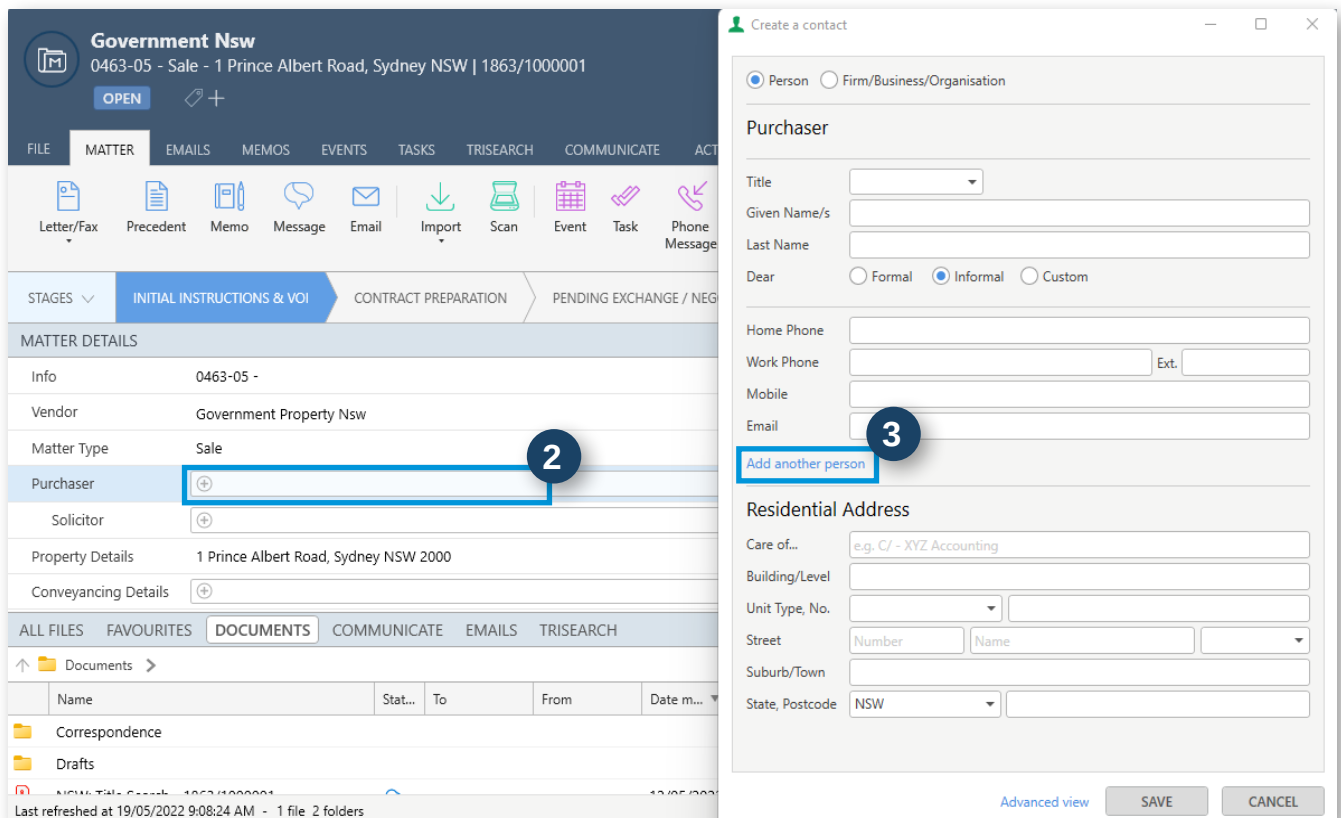
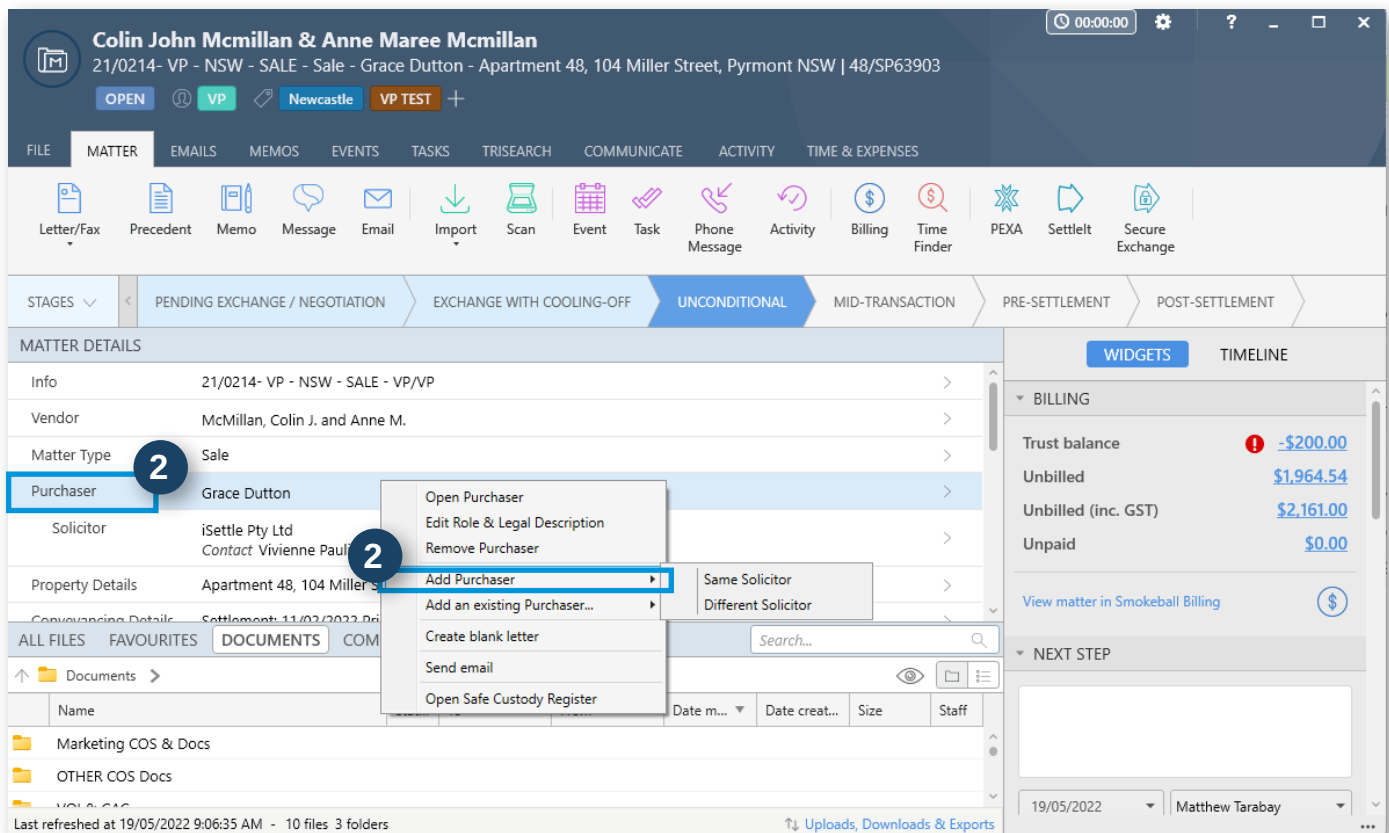# Add multiple individuals with same address to a matter

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.

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.

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.