triSearch®

Securexchange

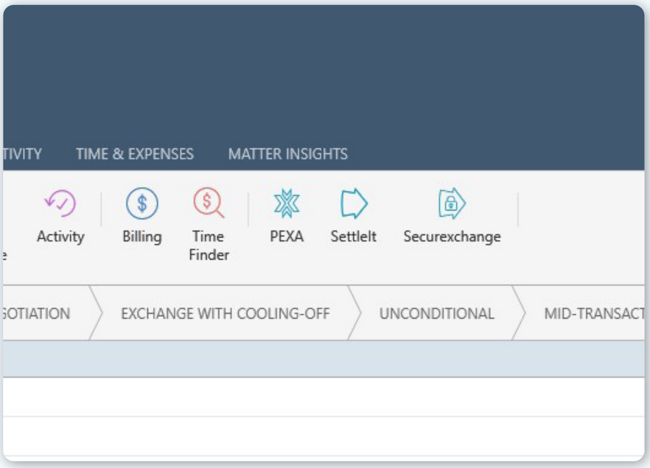
POWERED BY INFOTRACK

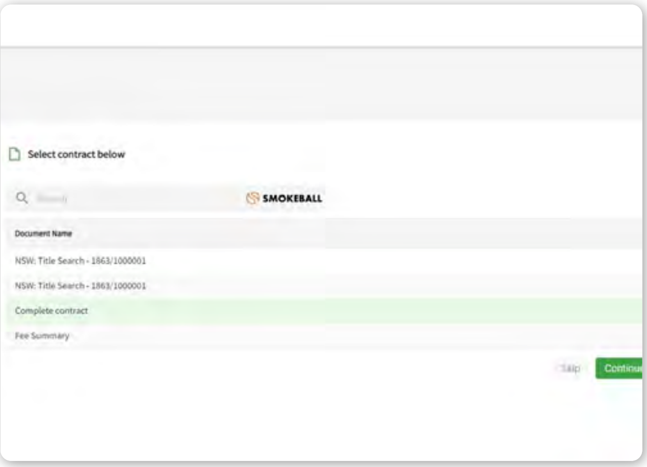
Userguide

Securexchange allows you to securely share documents and bank account details with your clients. This digital solution allows you to create a portal where you can upload any documents from your matter and invite clients or other parties to join. The portal will ask your clients for two-factor authentication before they can join and all funds are guaranteed up to $1 million.

Step 1: Launch Securexchange

- Launch Securexchange from within triConvey



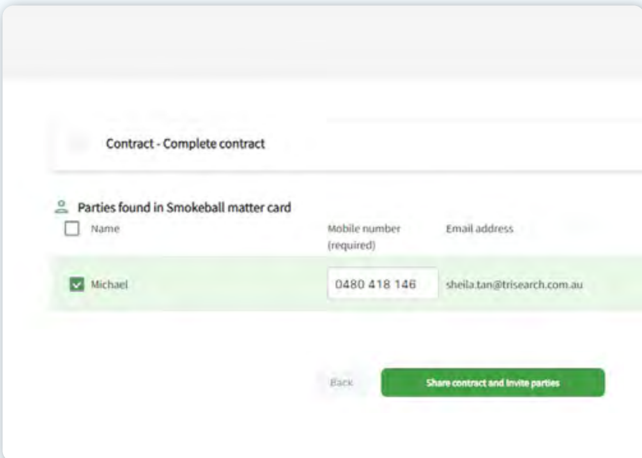


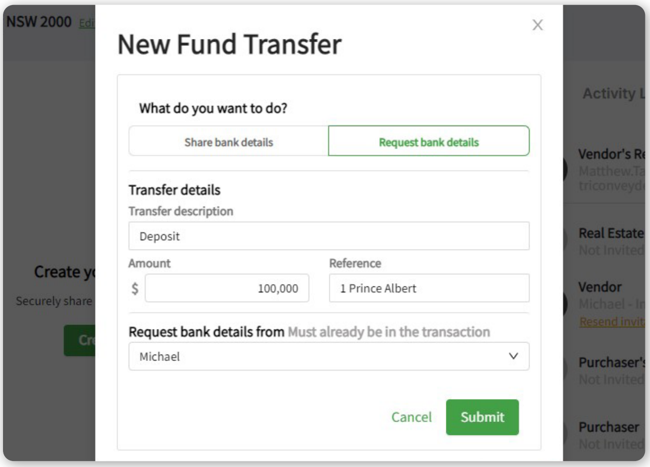
Step 2: Select Documents

- Select the document/s you wish to upload to the portal

Step 3: Invite Client

- Invite your client to join the portal. They will receive an email with a link to access the portal.
- Before they can join, they will be sent a text message with an authentication code.



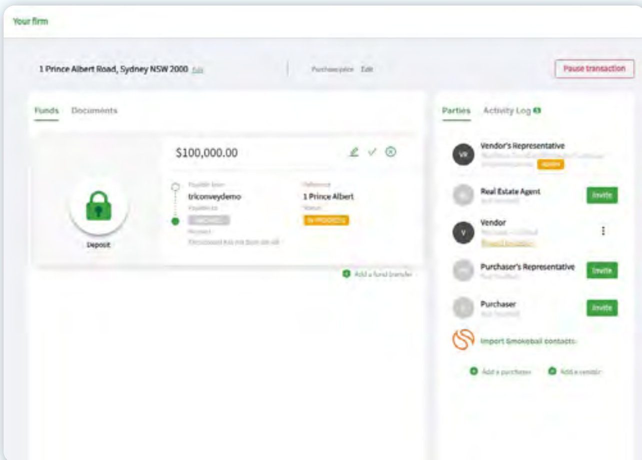


Step 4: Select funds & share details

- **Select the 'Funds' tab to share your trust account details or request bank details from your client or another party within the workspace.**

Step 5: Tracking

- **You will be notified when your client takes any action within the portal, such as downloading a document or bank details being shared.**



Book a Training

If you want a training on Securexchange you can book a training with our specialists.

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