# triSearch<sup>®</sup>



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.

MID-TRANSACT

6

Securexchange

UNCONDITIONAL

## Step 1: Launch Securexchange

Launch Securexchange from within triConvey

Select contract below
Q SMOKEBALL
Document Name
NSW: Title Search - 1863/1000001
NSW: Title Search - 1863/1000001
Complete contract
Fee Summary

#### **Step 2: Select Documents**

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

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Activity

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\$

Billing

Time Finder

EXCHANGE WITH COOLING-OFF

### **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.

Contract - Complete contract		
Parties found in Smokeball matter card	Mobile number (required)	Email address
Michael	0480 418 146	sheila.tan@trisearch.com.au

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Share bank details	Request bank details	Vendo
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### 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.

**Book a Training**