

triSearch®

# eCOS

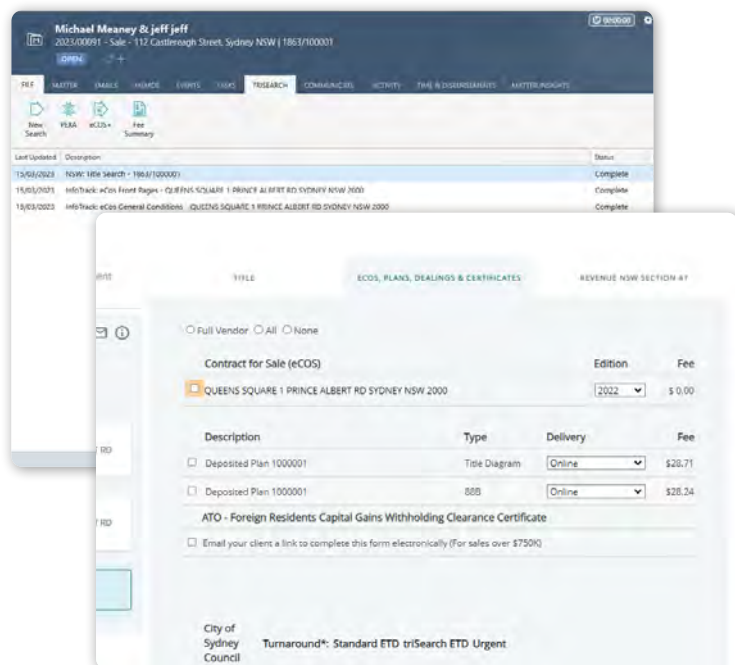
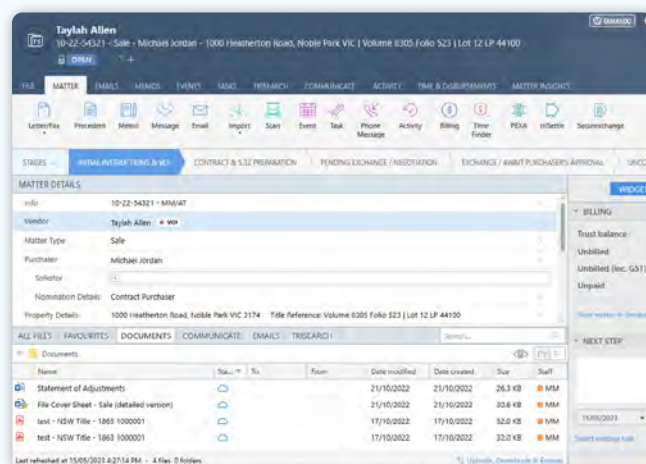
Userguide

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## Step 1: Prefill information

In order to execute the most efficient eCOS workflow, triSearch recommends entering the following information into your triConvey matter card:

- Open a new Sale Matter.
- Order the Title Search.
- Create & save a Matter Ref.
- Enter additional Vendor contact details.
- Enter the Real Estate Agent details if applicable.

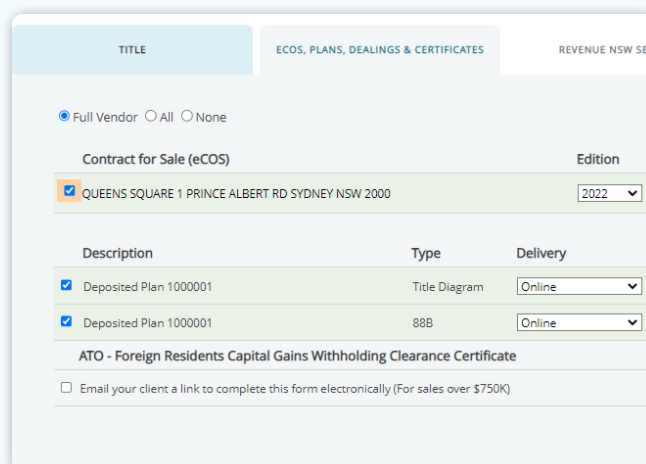


## Step 2: Enter the eCOS tool

- From the matter card, select the TRISEARCH tab along top menu.
- Select the pre-ordered Title Search from the line items displayed.
- Select the 'ECOS, PLANS, DEALINGS & CERTIFICATES' tab.

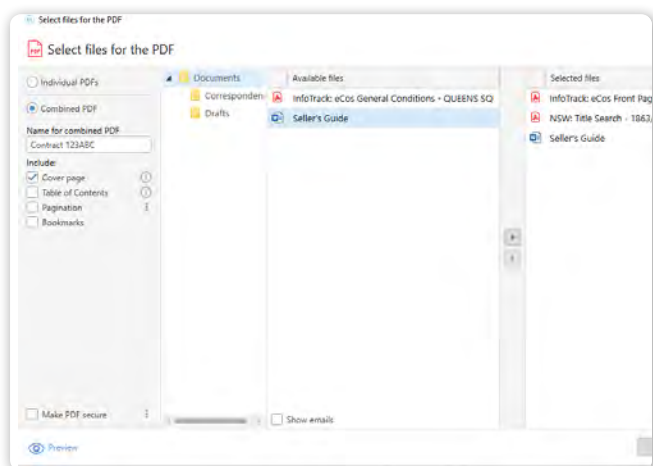
## Step 3: Building contract

- Select all relevant searches needed for your contract then click 'Order'. NOTE: Some searches will take different amounts of time to load or be returned.
- Import additional files using 'Import' button.



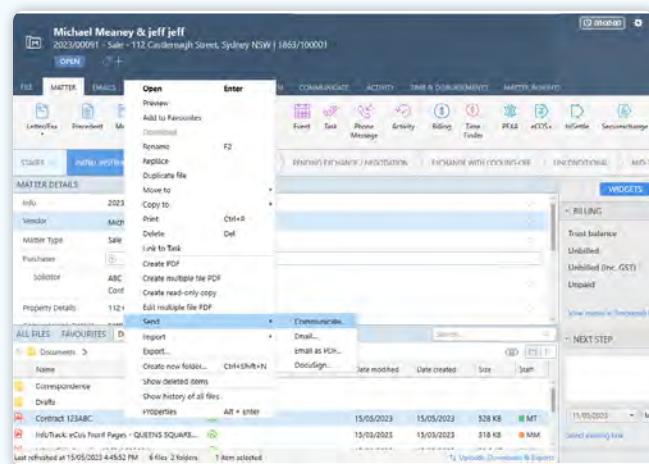
## Step 4: Saving contract

- In the matter card, right click on your eCos PDF, select 'Create Multiple File PDF' and a new window will open.
- Name the eCOS and choose any additional options such as adding a Cover Page
- Use second panel to access any folders within the matter that contain required searches or certificates.
- Click and drag all documents to your preferred order using dots on left of each document.
- Select 'Create' when ready. This will generate a PDF version of the full contract in the correspondence section of the matter.



## Step 5: Review & Send

- Review the document by double clicking on the PDF.
- The eCOS can be sent from the matter using three options:
  1. Securexchange.
  2. Communicate – Right click on the item in correspondence and select 'Send' then use the 'Communicate' option.
  3. Email – Right click on the item in correspondence and select 'Send' then use the 'DocuSign' option.



## Book a Training

For additional education on eCOS, book a session with our training specialists.

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