

triSearch®

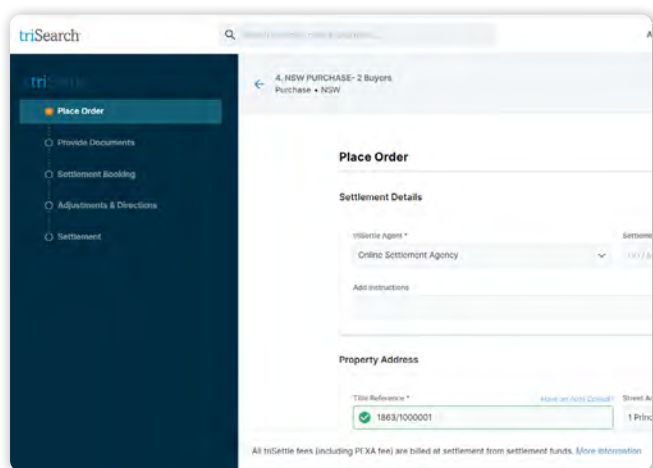
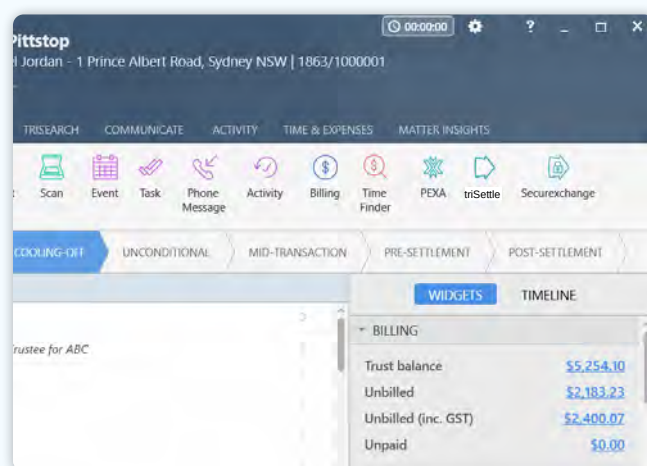
triSettle®

Userguide

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Step 1: Launching triSettle

- Open the matter card that you want to create a triSettle workspace for.
- Select the triSettle button on the top bar.

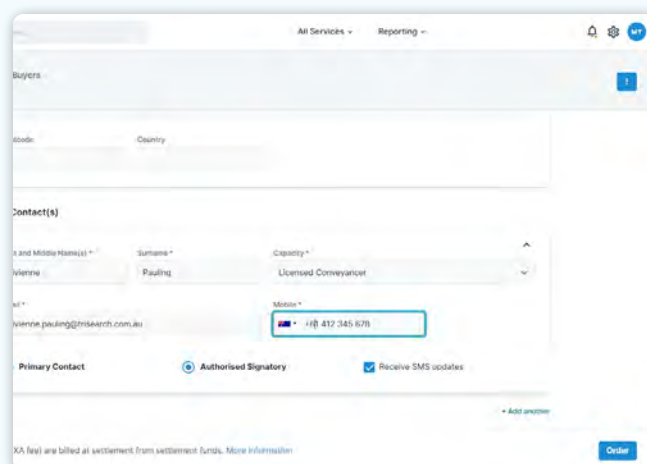


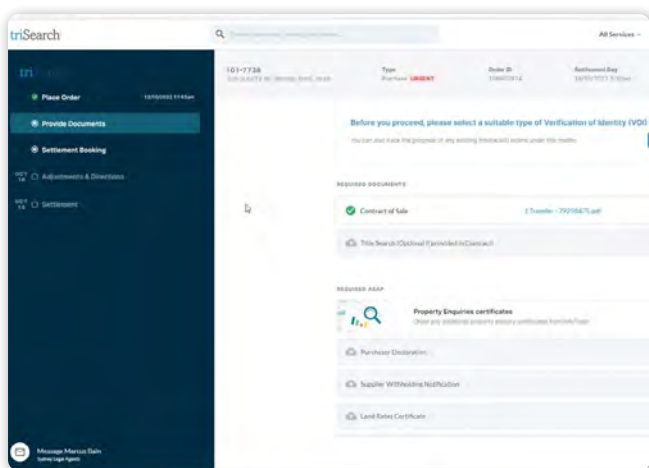
Step 2: Complete the settlement details

- Enter in your Matter Reference & Service required - Select Continue.
- Continue to add all the relevant details for the settlement, following the prompts.

Step 3: Order the settlement service

- The left-hand workflow panel will indicate where in the process your triSettle agent is and if any actions are required by you. The actions required by you will vary depending on the matter type.
- You will receive emails when you are required to action an item.



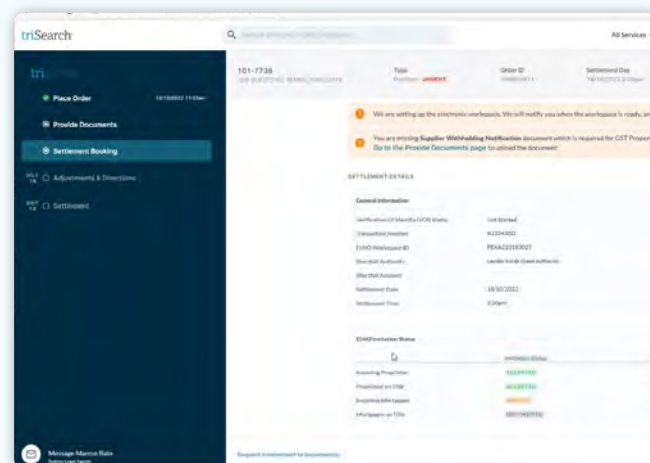


Step 4: Provide required documents

- Some documents are required before we can begin work on your file. You can also begin the VOI and CAF signing process from this screen.
- Please note: There are specific requirements for the VOI and CAF when transacting through triSettle that may vary from your standard practice.

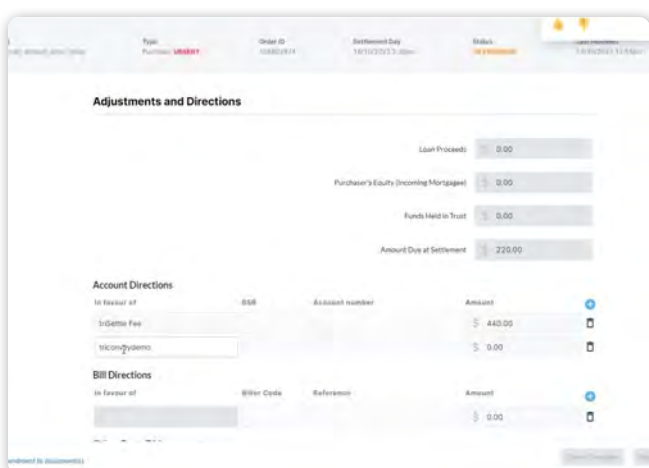
Step 5: triSettle agent review documents

- Once your triSettle agent has reviewed the documents you have provided, and can proceed with the settlement booking, you will be notified that the workspace has been created and the relevant banks invited.



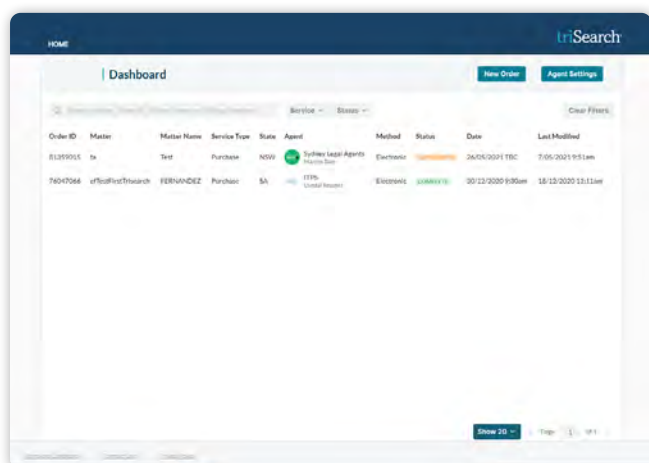
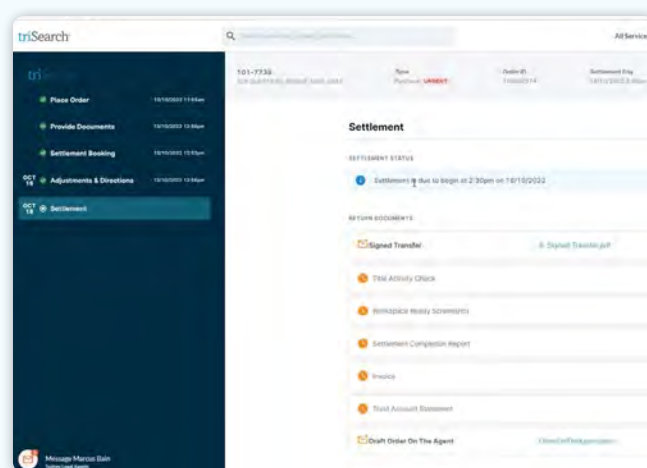
Step 6: Approve adjustments & directions

- Dependant on if you matter is a purchase or sale, there will be different steps that require your approval. When approval is required, you will receive an email for you to enter the triSettle workspace.
- Please note: If your approval on these steps is not received, your settlement can not move forward.



Step 7: Notification of completion

- You will receive notifications as the settlement progresses.
- Upon completion, any original documents will be returned.



Step 8: View triSettle dashboard

- For all your outstanding and completed settlements you can view them in your triSettle dashboard.

Book a Training

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

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