

triSearch®

# eCOS<sup>+</sup>

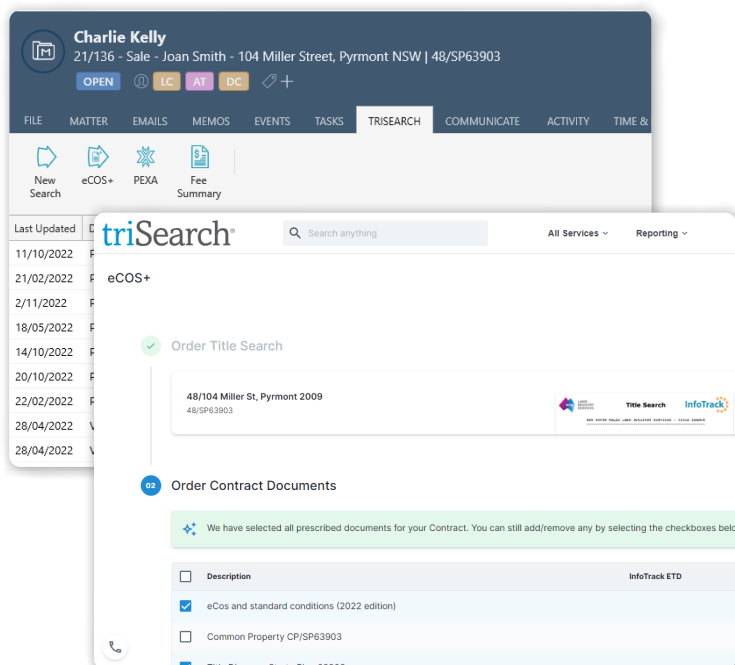
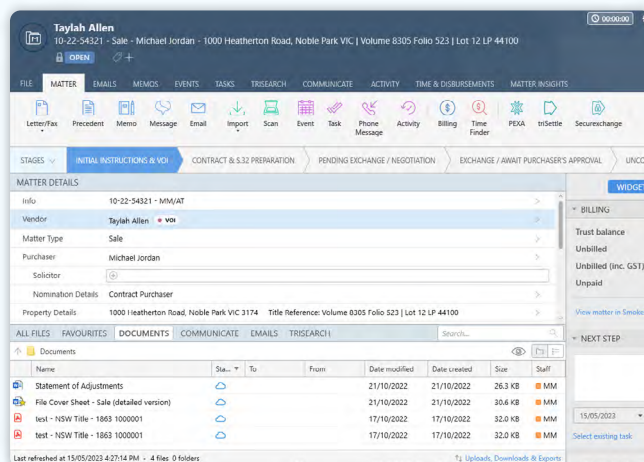
Userguide

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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.

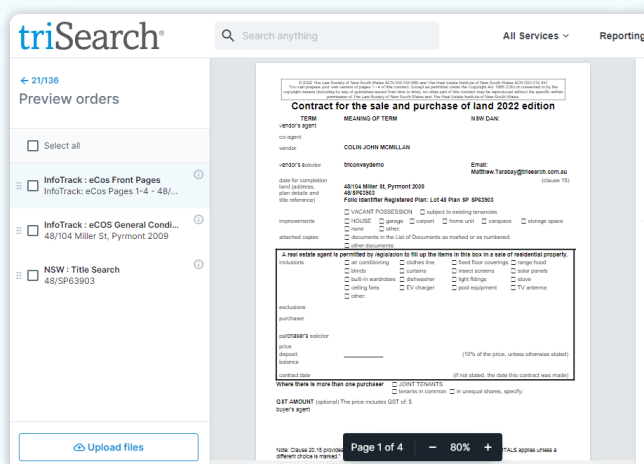


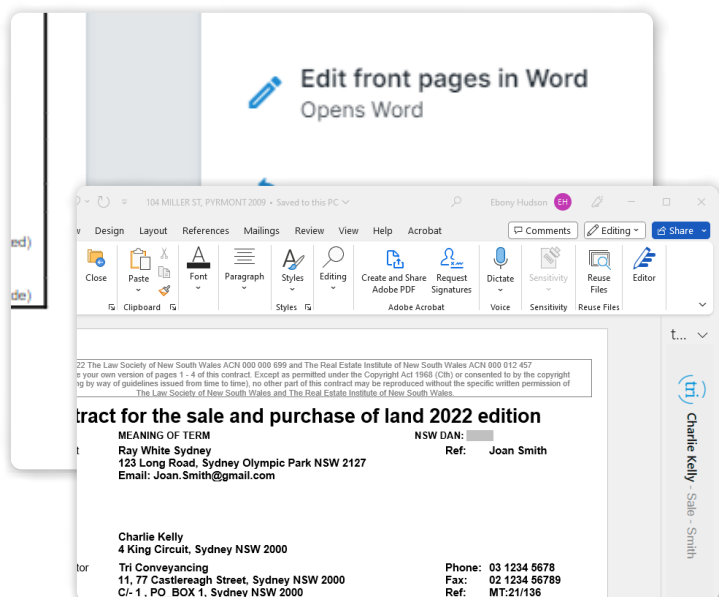
## Step 2: Enter the eCOS tool

- From the matter card, select the eCOS+ button along top menu.
- Select any contract documents to order.
- Select 'Place Order' and confirm or edit the watermark to continue.

## Step 3: Building contract

- Import additional files using 'Upload files' button.
- Additional orders can be placed with the 'Order eCOS' button.
- All documents can be rearranged on the left-hand side.



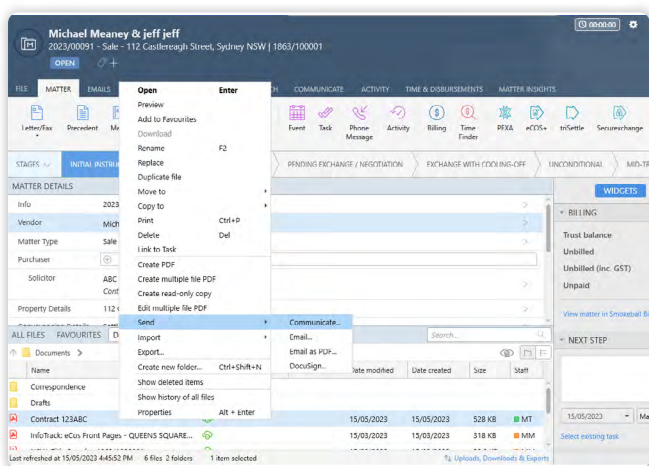
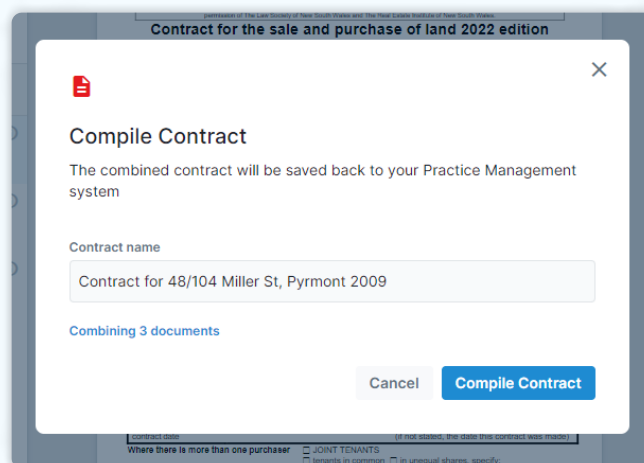


### Step 4: Edit contract

- Edit first four contract pages with integrated Word by selecting 'Edit front pages in Word'.
- Make all edits needed and select 'Save and Close' when ready.

### Step 5: Saving contract

- Right click on the line item, select 'Compile my contract'.
- Name the eCOS
- Select 'Compile Contract' when ready. This will generate a PDF version of the full contract in the correspondence section of the matter.



### Step 6: Review & Send

The eCOS can be sent from the matter using three options:

- Securexchange – see training hub for video on document sharing.
- Communicate – Right click on the item in correspondence and select 'Send' then use the 'Communicate' option.
- Email – Right click on the item in correspondence and select 'Send' then use the 'DocuSign' option.