Getting started

## 3 simple steps to start using Thirdfort

1   **Add Thirdfort wording into your client care letter**

- This is to inform your clients that you use Thirdfort as part of onboarding
- Some suggested wording for your standard client care letter:

> *As part of our "Know Your Client and ID" due diligence process, we invite clients to complete and submit their personal information via our third party app 'Thirdfort'. I enclose with our Terms of Service a Guidance Note for the App, for your kind attention. If you would prefer to not use this service, we would ask that you arrange a time with me to attend at our office with your original passport and proof of address and funds.*

2   **Add client leaflet into your welcome pack**

- You can view our client leaflet here
- This explains what the Thirdfort app does and how to download it
- We suggest you send this leaflet out to all clients as part of the welcome pack
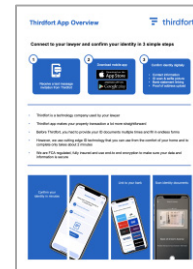
3   **Train your staff to use Thirdfort**

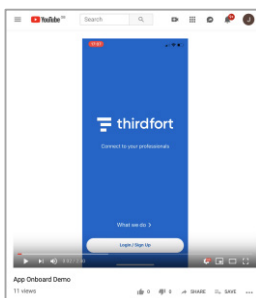- Use the agenda below to train your staff in less than 20 mins

Agenda:	3 mins	2 mins	5 mins	10 mins
	Watch video showing what the client app looks like	Review our example ID check results report	Explain how to initiate a check and retrieve results	Practical exercise – Staff pair up and ID check each other

5 mins:
- An ID check should be initiated by the lawyer first then completed by the client, which ensures the check results are visible to the lawyer immediately.
- If the client downloads the app and completes the ID check before the lawyer initiates the check the results will not be visible automatically. The client will get an 'ID Share' request which they have to approve in the app, then the results are shared.

10 mins:
- One person should initiate a new ID check on the other person's mobile number. They will get a text message and can then download the app and complete the ID check.
- Then the other person should try going to the app store and downloading the app without initiating an ID check first. Once they have done the ID check, then initiate an ID check with that mobile number and see 'share request' prompt to complete in the app.