



Completing Your First Transfer Representing the Vendor in WA

Use the following steps as a guide to completing your first transfer with financial settlement in PEXA

Proprietor on Title

(Vendor)

1. Either: Create a New Workspace

Create New Workspace

with the following key details:

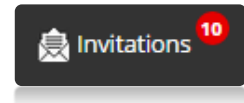
- ✓ WA Jurisdiction
- ✓ Role = **Proprietor on Title**
- ✓ Land title(s)
- ✓ Subscriber Workspace reference
- ✓ Workgroup
- ✓ Financial Settlement date and time



Start as soon as possible

or, Accept an Invitation

- Review the Invitation sent from the **Incoming Proprietor**
- Select **Accept**




Accept within 5 business days

2. Review Land Titles

- Navigate to the Land Titles screen
- Review the land title details returned from the Land Registry (including proprietors on title, any existing caveat or mortgage details)

3. Confirm Representation of Party

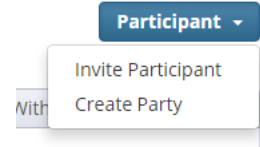
- Navigate to the Participants screen
- Locate the **Proprietor on Title** parties
- Click  > **Edit Party** to display the Party screen
- Select **I Represent this Party**
- Enter client details, including date of birth and address details

This step confirms your representation and ensures the party details are correct

- Click 

4. Invite Participants

- Select Participant > Invite Participant
- Invite **Incoming Proprietor**: Invite the PEXA Subscriber who is representing the Incoming Proprietor (if not already in the Workspace)
- If the title is encumbered, invite **Mortgagee on Title**



5. Monitor the Incoming Proprietor's Completion of Tasks



- The **Incoming Proprietor** should:
 - Accept your invitation
 - Create Party
 - Invite Incoming Mortgagee
 - Create Transfer
 - Verify Stamp Duty

*Please refer to:
Completing Your First Transfer
Representing the Purchaser*

6. If the Title is Encumbered, Monitor Mortgagee on Title's Completion of Tasks

- The **Mortgagee on Title** should:
 - Accept your invitation
 - Create Discharge document
 - Sign Discharge



*The financial institution who is the
Mortgagee on Title was
invited to the workspace in step 4*

7. Confirm Document Details

- Navigate to the **Documents** screen

- Click   **Edit > Transfer**

8. View Lodgement Instructions

- Click   **View > Lodgement Instructions**

*Select **View** if no changes are required. Select **Edit** to update any of the details in a document*

*Lodgement verification is initiated on **Save***

9. Sign Lodgement Instructions

- Click   **Sign > Lodgement Instructions**



At least 5 business days before settlement

10. Receiving funds: Complete Destination Line Items

- Navigate to the **Financial Settlement** screen
- Select the **Destination** tab
- **Add Destination** fund line items for the transaction (e.g. Vendor's funds, conveyancing fees)



2 business days prior to settlement

11. Sign Financial Settlement Schedule

- Click  **Sign > Sign Settlement Schedule**



At least 1 hour prior to settlement

12. Monitor Workspace



- Review your workspace and monitor any changes to the workspace right up to settlement via the **Workspace Summary** screen
- You also receive email notifications informing you of changes to the workspace

*The workspace must be in **Ready status** for settlement to be successful*

13. Successful Settlement

- Check that :
 - All documents are signed and lodgement verification is successful
 - Financial Settlement is correct and **balanced**



PEXA Support Centre
support@pexa.com.au
1300 084 515