

PEXA Projects

A guide for lawyers and conveyancers



Manage large scale projects at the click of a button

What is PEXA Projects?

PEXA Projects is new functionality that allows lawyers and conveyancers to manage large scale projects (i.e. multi-lot developments) and efficiently complete the online property exchange process. At no extra cost, PEXA Projects provides additional features including a single project overview dashboard and the ability to complete bulk actions across your PEXA Workspaces. Together with the many benefits of settling online, these help streamline the processes involved in the coordination and execution of settlements.

What are the benefits of PEXA Projects?

- Reduce the administrative time and effort required for coordinating settlement of off-the-plan sales.
- Remove the need to rekey information from practice management software into PEXA.
- Source the data required to create PEXA Workspaces and populate documents for settlement from your existing practice management process.
- Upload data via a structured CSV file at the click of a button.
- Automatically create and populate all Workspaces within a development project - enabling the completion of conveyancing matters online with speed, accuracy and efficiency.
- View the status of all transactions within a development from a single consolidated project view.

- Make bulk updates to multiple PEXA Workspaces throughout the settlement process.
- Minimise the amount of paper required in the property exchange process leading to a more environmentally friendly workflow.

How do I upload my data to PEXA Projects?

PEXA can assist you with converting your current data exports into structured CSV files for upload to PEXA Projects. For assistance with converting your files into the required format, please email pexaprojects@pexa.com.au.



What data can be uploaded into PEXA Projects?

The following data for each sale within a property development project can be bulk uploaded into PEXA Projects via a structured CSV file. It is recommended to upload as much information as is known to reduce work required for all Workspace participants.

Mandatory information:

- **Subscriber Reference** - Matter Number/File Reference
- **Child Title Reference** - Parent Title Reference can be used if Child Title Reference is not yet known
- **Incoming Proprietor Representative** - The Purchaser's representative (PEXA Subscriber) to be invited into the Workspace

Recommended information:

- Unregistered Lot on Plan reference
- Contract of Sale date
- Gross consideration amount (\$)
- Deposit amount (\$)
- GST amount (\$)

Optional information:

- **Incoming Proprietor Party** – Individual (Purchaser) details
 - **Legal Name** – as written on Contract of Sale
 - **Address**
- **Incoming Proprietor Party** – Organisation (Purchaser) details
 - **Legal Entity Name**
 - **Address**
 - **Organisation Type**
 - **ABN / ACN / ARBN / ACLN**

What happens once I've uploaded my data to PEXA Projects?

When you upload a file into PEXA Projects, the data is used to:

- Automatically create the Workspaces within your project
- Add the PEXA Subscriber acting on behalf of the purchaser to the Workspace
- Add the details of the purchaser party to the Workspace
- Pre-populate the transfer and other supporting documents with key information
- Populate the Child Title Reference into the Workspaces once known



What next?

Contact PEXA to find out more about how we can assist you with your upcoming development projects.

Email us at pexaprojects@pexa.com.au.