

1. Prepare Workspaces


You will prepare your separate Workspaces in PEXA. Whether the link is for a sale/purchase, a refinance/purchase etc, the Workspaces are set up as normal:

- Create Workspace/Accept invitation
- Prepare Participants
- Prepare Documents
- Prepare other financial details


Note: Your Settlement Date and Time **must** align.

2. Set up the Link

There will be a **Preceding Workspace** and a **Trailing Workspace**. The **Preceding Workspace** is where excess funds will be used to fund the **Trailing Workspace**.

- Navigate to the **Preceding Workspace**
- Click **Settlement**
- Click the **Destinations/Adjustments & Payments Tab**
- Click **Add Destination**
- From Category, select **Linked Financial Settlement**
- Select the Linked Settlement type:
 - **Simultaneous** – at the same date & time
- Select the Trailing Workspace
- Enter the amount
- Click  .

3. Accept the Link Request

- Navigate to the **Trailing Workspace**
- Select [Accept or Decline Linked Settlement Request](#)
- Review the link details and click 
- Click on the **Sources** Tab – you will notice there is a new Source Line Item for the Linked Financial Settlement.
- If the details are all correct, you can now sign your settlement schedule as per normal.

Important to note:

- The amount required from the Preceding Workspace to the Trailing Workspace is calculated outside of PEXA
- **All** Workspaces linked for settlement must be at **Ready Ready** status, or no Workspaces in the chain will settle
- You can link Workspaces for Settlement across jurisdictions
- You can link your Workspaces at any time – just remember to have the correct figure in the link before settlement (you can edit/update the link amount at any time before settlement)

For more information visit:

[Community - Linked Simultaneous Settlements](#)