

## 1. Either: Create a new Workspace

Click **Create New Workspace** with these details:

- Select your jurisdiction
- Role = **Incoming Proprietor**
- Land Title(s) **and Validate**
- Subscriber Workspace Reference (matter number)
- Financial Settlement Date and Time
- Transfer = **Yes**
- Request Land Title Data = **Now**
- Workgroup.

## or, Accept an Invitation

- Review the Invitation
- Select **Accept**
- Enter your Subscriber Workspace reference (your unique identifier for the workspace, e.g. matter number).
- Workgroup.

## 2. Review Land Titles

- Navigate to the **Land Titles** screen
- Review the land title details returned from the Land Registry.

## 3. Create Party

- Navigate to the **Participants** screen
- Select **Create Party**
- Select **I Represent this Party**
- Role = **Incoming Proprietor**
- Enter Party details, including date of birth and address
- Click **Save**.


## 4. Invite Participants

- On the Participants screen, select **Invite Participant**
- If required, invite Vendor's Representative as **Proprietor on Title**
- If a Mortgage is to be lodged, invite the **Incoming Mortgagee**.

## 5. Create Transfer



- Navigate to the **Documents** screen
- Click **Create Document** > **Transfer**
- Create document as required
- Click **Save**
- If NSW, VIC or QLD, **create, sign and lodge Priority Notice** (if applicable)
- If VIC, edit the **Notice of Acquisition** and complete the document
- If NSW, edit the **Notice of Sale** and complete the document
- If QLD, edit **Form 24 Part A** and complete the document.

## 6. Verify Stamp Duty


- Navigate to the **Stamp Duty/ Transfer Duty** screen
- Unless in VIC, Click **Enter Duty Information**
- Complete details as per your jurisdiction
- If in VIC, click  to **Verify Duty**.
- If in WA, navigate to the **Property Information** screen and complete outstanding details.

It is your responsibility to prepare an application for a duty assessment.

## 7. Edit Lodgement Instructions (If Responsible Subscriber)

- Click  > **Edit > Lodgement Instructions**
- Confirm Responsible Subscriber
- Review order of lodgement
- Review issuing details (if applicable)
- Click .



## 8. Sign documents

- Click  > **Sign** all applicable documents


## 9. Complete Destinations/ Payments & Adjustments and verify Source line items

- Navigate to the **Financial Settlement** Screen
- Select **Destinations/Payments & Adjustments** tab
- **Add Adjustments** if applicable
- **Add Destination** line items where necessary (e.g. water authority, local council, conveyancing fees)
- Select **Source** tab
- Add **Source funds** where necessary (e.g. Purchaser's equity)

Note: if there there is an Incoming Mortgagee providing full funds at settlement, you may not need to add source funds.

- Click  > **Verify Funds** to verify the line item
- Click  > **Authorise** to authorise the Trust Account payments
- If there is an Incoming Mortgagee, confirm funds required to settle

## 10. Sign Financial Settlement Schedule

- Click  > **Sign** to digitally sign the settlement schedule

## 11. Monitor Workspace

Check that:

- All documents are signed and lodgement verification is successful
- Financial settlement is correct and balanced and signed.

The workspace must be in **READY Status** for settlement to be successful

- Review your Workspace and monitor any changes to the Workspace via the Workspace Summary screen.

## 1. Either: Create a New Workspace

Click **Create New Workspace** with these details:

- Select your jurisdiction
- Role = **Proprietor on Title**
- Land Title(s) **and Validate**
- Subscriber Workspace Reference (matter number)
- Financial Settlement Date and Time
- Transfer = **Yes**
- Request Land Title data = **Now**
- Workgroup.


## or, Accept an Invitation

- Review the Invitation
- Select **Accept**
- Enter your Subscriber Reference (your unique identifier for the Workspace e.g. Matter Number)
- Workgroup.

## 2. Review Land Titles

- Navigate to the **Land Titles** screen
- Review the land title details returned from the Land Registry.


## 3. Confirm Representation of Party

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

## 4. Invite Participants

- On the Participants screen, select **Invite Participant**
- Invite **Incoming Proprietor's Representative** (if not already in the Workspace)
- If the title is encumbered, invite the **Mortgagee on Title**.

## 5. Confirm Document Details


- Navigate to the Documents screen
- Click  > **View > Transfer**
- Check the details are correct
- If required, edit the transfer
- If in QLD, edit **Form 24-b**
- If the title is unencumbered and issued in paper in VIC or NSW:
  - VIC: create, sign and lodge a **Nomination**
  - NSW: create a **Consent**.

## 6. View Documents

- Click  > **View** for each document

Select View if no changes are required. Select Edit to update any of the details in a document. Lodgement verification is initiated on **Save**.

## 7. Sign All Documents

- Click  > **Transfer** > **Sign**.

## 8. Complete Destinations

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

## 9. Sign Financial Settlement Schedule

- Click  > **Sign** to digitally sign the Financial Settlement Schedule.

## 10. Monitor Workspace

Check that:

- All documents are signed and lodgement verification is successful
- Financial settlement is correct and balanced and signed.

The workspace must be in **READY READY Status** for settlement to be successful

- Review your Workspace and monitor any changes to the Workspace right up to settlement via the Workspace Summary screen.