PEXA Projects

Help Card

Create a new PEXA Project

Select Create a new PEXA Project +

- Project Name
- Jurisdiction
- Project Workgroup
- Estimated Settlement Date
- Parent land title (only 1 required)
- Enter Proprietor on Title details
- Mortgage details (if applicable)
- Do you intend to restrict account details?
- Jurisdictional questions (if applicable)
- Click SAVE TO CREATE PROJECT.

Prepare Excel File

- Your Excel file may include both new Workspaces for creation AND existing Workspaces for updating.
- The file MUST include a tab called **Workspaces** with the following columns:
    - Subscriber Reference
    - Lot number
    - Child Title (if plan of subdivision has been registered)
    - Incoming Proprietor representative (if known)

  Optional fields include purchaser and gross consideration
- PEXA Projects provides a sample template to download.

Upload your file

- **Step 1 – Upload your file**

  Select an Excel file that contains Workspaces data and click **Next** to upload it into PEXA Projects
- **Step 2 – Map your data**

  After your file is uploaded, map your fields (right column) to PEXA line item fields (left column)
- **Step 3 – Confirm your Workspaces**

  Review and confirm your Workspaces. Any errors that cannot be match will be highlighted on the screen and must be rectified.
- **Once the file as been uploaded, your Workspaces have been created.**

  Note: Invitations to MOT are automatically sent when Workspaces are created.

Send Batch Invitations

You can send batch Invitations to the Incoming Proprietors

- Select **Manage Participants**
- Select **IP Invitations** to send invitations
- A tick will appear to show the action as successful

Upload Child Title data

Important! – Ensure your registered proprietor is set up as a [Frequently Represented Party]() in PEXA prior to uploading Child title data.

- Ensure your spreadsheet is correct and current;
- Follow the steps to upload and map a file to PEXA Projects

Propose Settlement Date

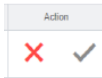
The Proprietor on Title will set the Settlement Date. This is usually done after the child titles have been issued

- Select **Propose Settlement Date**
- Fill in the **proposed date and time**
- Insert a reason (mandatory field)
- Select Workspaces to set the proposed date
- Select **Propose Settlement Date.**

  Note: You can select multiple together or send them individually.

Manage Financial Accounts

- Navigate to **Financials** and select **Manage Financial Accounts**
- Do you intend to restrict accounts this project can disburse to? = **Yes/No**
- If Yes, select **Add Account(s)** for this project
- Select **Account Type**: Bank Account/BPAY
- Select **Category** (e.g. Vendor Funds)
- Complete account description, account name and account details
- Click **Add Account**
- A Trust Authoriser must Approve or Delete the account



Important note! The user who adds the account cannot be the same user who approves the account

- Complete the above steps for all accounts you wish to add.

Prepare Financial Excel File

- Download the template from PEXA Projects
- Click Enable Editing
- Your template contains 4 worksheet TABS at the bottom with sample data for both Destinations and Sources.

  On the Destinations tab, highlight the sample data and **delete** it.
- Complete fields as required.

Financial data upload

- Navigate to **Manage Workspaces > Bulk Upload Financials**
- Step through the **Bulk Upload Financials Wizard**
- Once you have successfully mapped all source and destination line items select **Update Workspaces.**

Tips and Tricks in PEXA Projects

- After the above has been completed, you will monitor the Workspaces. The Incoming Proprietor, Mortgagee on Title (if applicable) and Incoming Mortgagee (if applicable) will prepare their documents and financials
- The Project Dashboard displays all of the current Workspaces and their status
- Clicking on any of these Workspaces will take you to that Workspace in core PEXA
- You will see when documents are ready to be signed in PEXA Projects. You can then filter these workspaces and click through to the relevant workspace for signing

There are additional tabs in PEXA Projects to monitor your Workspaces including Document Data, Settlement Date and Financials.

For more information visit:

[Community - PEXA Projects]