


Create a new Workspace


Click  and add the following details:

- > Select your Jurisdiction
- > Select Transaction Type = **Purchase**

Note: This step is not applicable for ACT Workspaces. Proceed to select 'Role'.

You can click the tick box to 'Make this my default Transaction Type'. This is **optional**.


- > Role = **Incoming Proprietor**

> Land Title(s) and 


- > Subscriber Workspace Reference

- > Financial Settlement Date and Time

The question defaults to 'Yes' based on whether the Transaction Type would most likely include Financial Settlement.

- > Mark all land title references in workspace as parent = **Yes/No**
- > Transfer = **Yes**
- > Request Land Title Data = **Now**
- > Workgroup
- > Click .



Or accept an Invitation

- > Review the Invitation
- > Select **Accept**
- > Enter your Subscriber Workspace Reference
- > Transfer? = **Yes**
- > Workgroup
- > Click .

Review Land Titles


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

Create Party

- > Navigate to the **Participants** screen
- > Select 
- > Complete the outstanding details including date of birth and relevant addresses.
- > Click .

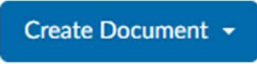

Invite other Participants

(if not already in the Workspace)

- > Select 
- > If required, invite Vendor's Representative as **Proprietor on Title**
- > If a Mortgage is to be lodged, invite the **Incoming Mortgagee**.
- > Complete the details and **Send Invitation**.

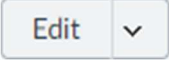
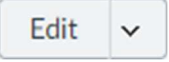
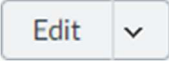

Create Transfer

If NSW, VIC or QLD, create, sign and lodge **Priority Notice** (if applicable).

- > Navigate to the **Documents** screen
- > Click  > **Transfer**
- > Complete outstanding details
- > **Note:** Information may vary between jurisdictions
- > Click .

Important! The document will specify what address is required. Ensure you read and complete all mandatory fields.

Supporting Documents

- > If **VIC**,  > edit the **Notice of Acquisition** and complete the document.
- > If **NSW**,  > edit the **Notice of Sale** and complete document.
- > If **QLD**,  > edit **Form 24 Part A** and complete document.
- > If **WA**, navigate to **Property Information** and  to complete outstanding details.

Enter Duty Information

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

- > If **VIC**, Navigate to the **Stamp Duty** Screen and obtain reference numbers
- > If **QLD**, navigate to the **Transfer Duty** Screen click **Enter Duty Information**
- > **NSW, SA, WA**, after completing your duty assessment in the relevant online duties system jurisdiction, navigate to the **Stamp/Transfer Duty** Screen click **Enter Duty Information**
- > If **ACT**, as per the Barrier free model, you will not pay Stamp Duty via PEXA. Please skip the *Enter Duty Information* steps in this Help Card.
- > If **VIC/QLD**, after completing your duty assessment in the relevant online duties system jurisdiction,

navigate to the **Stamp/Transfer Duty** Screen click

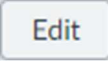



> **Verify Duty.**

Edit Lodgement Instructions

(if Responsible Subscriber)

Only once all documents have been created:

- > Click  > **Lodgement Instructions**
- > Review order of lodgement
- > If applicable, complete issuing instructions
- > Click .

Sign Documents

- > Click down arrow  > **View**
- > Click  > **Sign Documents.**

Complete Financial Settlement Schedule

- > Navigate to **Financial Settlement Screen**
- > If there is an Incoming Mortgagee, complete the **Total Funds Required to Settle** in the Settlement Summary tab





The Incoming Mortgagee will confirm if they hold Client Authorisation to provide shortfall in the **Settlement Summary.**

Destinations

- > Select **Destinations/Payments & Adjustments tab**
- > Add **Adjustments** if applicable
- > Add **Destinations** as applicable (e.g. water rates, professional fees etc)

If the Incoming Mortgagee is not providing for any shortfall, complete Source funds.

Sources

- > Select the **Source Funds** tab
- > Click **Add a Source** >
 - **Category = Purchaser's Equity**
- > Complete details and select 
- > Click  > **Verify Funds**
- > Click  > **Authorise Funds**
- > Select  > **Sign** to digitally sign the settlement schedule.

Ensure the Workspace is at Ready status on the day of settlement