PEXA Key
Request Account Details

Invite your client to PEXA Key

- Open a new Workspace or navigate to an existing Workspace
- Navigate to the **Participants** screen
- Edit or create the party record for your client
- Select the PEXA Key checkbox
- Enter your client's mobile number and email address

  Double check the details entered.
  Incorrect details will require you to un-represent and re-enter your party details.

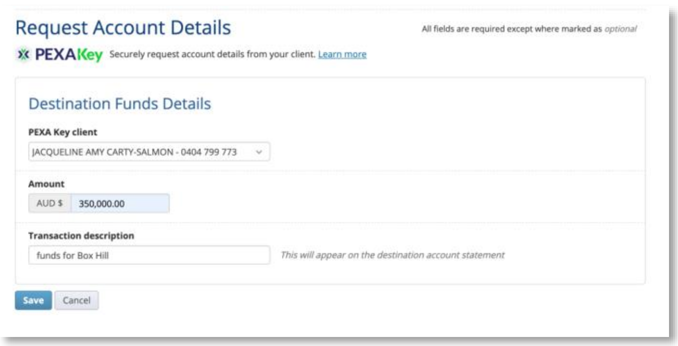
- Click **Save**.

Navigate to the Financial Settlement screen

- Select the Adjustments & Payments tab
- Click **Request Account Details**.

Request Account Details

- Complete the details in the form


Request Account Details
All fields are required except where marked as *optional*
PEXA Key Securely request account details from your client. Learn more

Destination Funds Details
PEXA Key client
JACQUELINE AMY CARTY-SALMON - 0404 799 773
Amount
AUD $ 350,000.00
Transaction description
funds for Box Hill
This will appear on the destination account statement
Save Cancel

- **PEXA Key Client**: Select the name of your PEXA Key client from the list
- **Amount**: Enter the amount to be deposited to your clients account at settlement. The amount can be edited later if required
- **Transaction Description**: This is the reference which will appear on your client's account statement
- Click **Save**.

Notification in PEXA Key

PEXA automatically sends your client a notification via the PEXA Key app, asking them to complete their bank account details.

The request will remain open until your client completes their Bank Account details.

Bank Details Submitted

- Once you client has entered their bank account details via the app, the Workspace is automatically updated.
- Click **action cog** > **Create** to populate the details as a Destination Line Item.

The line item can be edited at any time leading up to your settlement.

PEXA Key
Send Trust Account Details

Invite your client to PEXA Key

- Open a new Workspace or navigate to an existing Workspace
- Navigate to the **Participants** screen
- Edit or create a party record for your client
- Select the PEXA Key checkbox
- Enter your client's mobile number and email address

> Double check the details entered. Incorrect details will require you to un-represent and re-enter your party details.

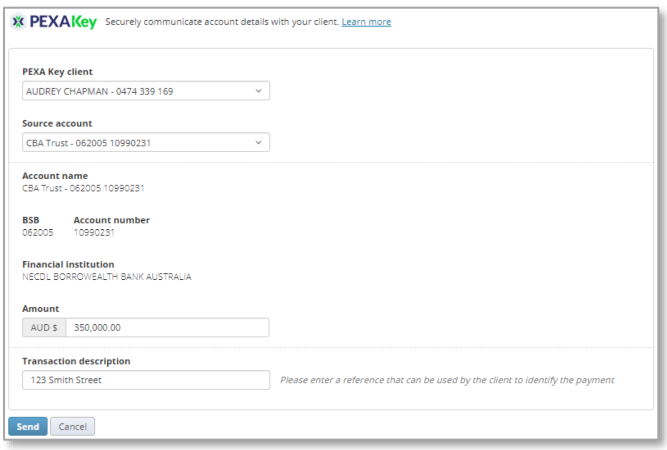
- Click **Save**.

Navigate to the Financial Settlement screen

- Select the **Sources** tab
- Click **Send Trust Account Details**.

Send Trust Account Details

- Complete the details in the form



- **PEXA Key Client**: Select the client you wish to send your trust account information using PEXA Key
- **Source Account**: Select the trust account details you wish to send
- **Amount**: Enter the exact amount you require your client to deposit into your trust account
- **Transaction Description**: This is the reference that is displayed in PEXA Key and should be entered by your client when transferring funds
- Click **Send**.

> If you are using the **PEXA Source Account** > create the source line item and select '*Send my client account details through PEXA Key*.'

Notification in PEXA Key

PEXA automatically sends your client a notification via the PEXA Key app, asking them to review the bank account details.