


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.

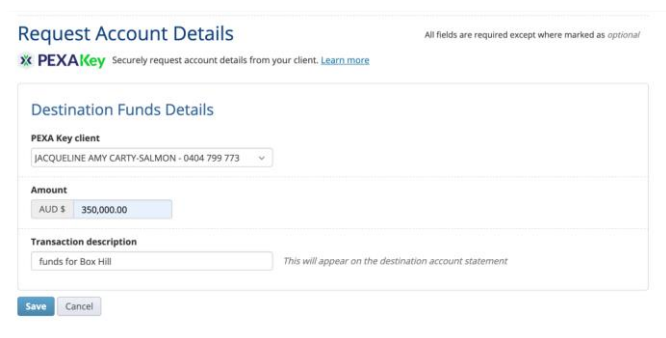
- Click **Save**.

Navigate to the Financial Settlement screen

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

Request Account Details

- Complete the details in the form



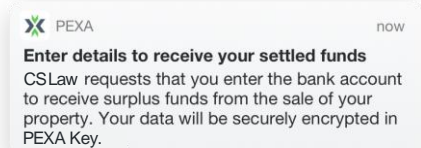
The screenshot shows a web form titled "Request Account Details" with the PEXA Key logo and a note: "Securely request account details from your client. [Learn more](#)". Below the title is a section for "Destination Funds Details". It includes a dropdown menu for "PEXA Key client" with the selected value "JACQUELINE AMY CARTY-SALMON - 0404 799 773". There is an "Amount" field with "AUD \$" and "350,000.00". A "Transaction description" field contains "funds for Box Hill" with a note: "This will appear on the destination account statement". At the bottom are "Save" and "Cancel" buttons.

- **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.

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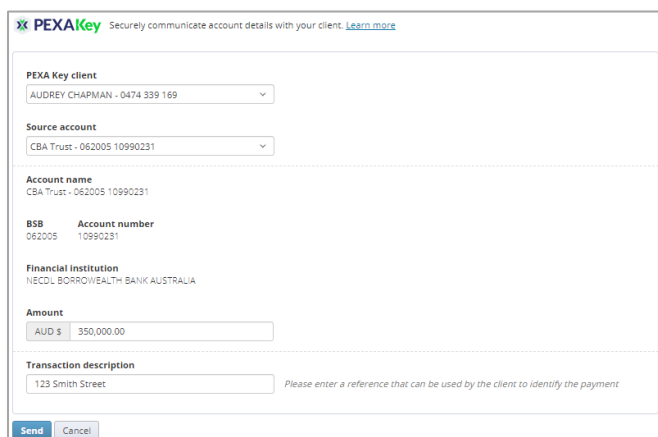
- Click **Save**.

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



The screenshot shows a web form titled 'PEXA Key' with the subtitle 'Securely communicate account details with your client. [Learn more](#)'. The form contains the following fields:

- PEXA Key client:** A dropdown menu with 'AUDREY CHAPMAN - 0474 339 169' selected.
- Source account:** A dropdown menu with 'CBA Trust - 062005 10990231' selected.
- Account name:** A text field with 'CBA Trust - 062005 10990231' entered.
- BSB:** A text field with '062005' entered.
- Account number:** A text field with '10990231' entered.
- Financial institution:** A text field with 'NEDOL BORROW/WEALTH BANK AUSTRALIA' entered.
- Amount:** A text field with 'AUD \$ 350,000.00' entered.
- Transaction description:** A text field with '123 Smith Street' entered. Below the field is the instruction: 'Please enter a reference that can be used by the client to identify the payment'.

At the bottom of the form are two buttons: 'Send' and 'Cancel'.

- **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.

