

# Private Sale Invoice | Broker User Guide



## Contents

<b>How to activate Private Sale Invoice (PSI) service? .....</b>	<b>3</b>
<b>How does Private Sale Invoice (PSI) with Acknowledgement + E-Signature work for broker? .....</b>	<b>3</b>
<b>Can I upload my PSI document/template for seller's acknowledgement and signature? .....</b>	<b>8</b>
<b>What are the steps for seller/vendor for PSI request with signature?.....</b>	<b>10</b>
<b>How do I track the status of PSI? .....</b>	<b>13</b>
<b>Can seller/vendor reject the PSI requested for signature? .....</b>	<b>15</b>
<b>How to view/download the signed/acknowledged PSI document? .....</b>	<b>16</b>
<b>How to view the rejected reasons if a PSI document gets declined? .....</b>	<b>16</b>
<b>How does the Private Sale Invoice (PSI) with Acknowledgement only work? .....</b>	<b>18</b>
<b>What does the seller see in case of Private Sale Invoice (PSI) with Acknowledgement only? .....</b>	<b>21</b>
<b>Can I enable both options for PSI with and without signature to allow the users to choose it on the go as required? .....</b>	<b>22</b>

## How to activate Private Sale Invoice (PSI) service?

If the selected Lender for the New Inspection request, has activated PSI- you will have options to generate Private Sale Invoice according to their preferred method.

As a Broker admin, you can generate Private Sale Invoice for your "No Lender" inspections. To enable the PSI preference go to **Settings->Company Details->Permissions-> Do you want your brokers to generate Private Sale Invoice for the seller?** to allow your brokers to generate PSI for your inspections. You can opt for one of the below options to enable PSI.

1. **Get Acknowledgement +E-Signature:** Seller will acknowledge and provide digital signature in the document.
2. **Get Acknowledgement only:** Seller will just share acknowledgement of the document.
3. **Allow user to choose:** Brokers will be prompted to select one of the above 2 options at run time.

Do not forget to click "Save & Update" to reflect the changes.

The screenshot shows the 'Company details' section of the Dox Asset Verification portal. The 'Portal customisation (optional)' section is expanded, showing the question: "Do you want your brokers to generate Private Sale Invoice for the seller?". Below this question are four radio button options:

- Do not allow
- Get Acknowledgement + E-Signature - (\$4.50) ⓘ
- Get Acknowledgement only - (\$3.20) ⓘ
- Allow user to choose

A red arrow points to the "Save & Update" button at the bottom right of the settings section.


## How does Private Sale Invoice (PSI) with Acknowledgement + E-Signature work for broker?

When PSI with **Get Acknowledgement + E-Signature** is enabled -

1. While creating a new inspection, you will see an optional "Cost Details" section, which will be an input for PSI. If the cost details are not available while creating the inspection, you can provide these details when you initiate the PSI after Asset verification report is

granted/completed.















The screenshot shows the 'Create new inspection' form. The 'Inspection detail' section includes fields for Seller first name, Seller last name, Seller e-mail (Optional), Seller Mobile, Buyer first name (Optional), Buyer last name (Optional), Buyer e-mail (Optional), Buyer Mobile (Optional), Lender, Asset (Motor Vehicle), State (NSW), Inspection type (New Landing), and Lender reference. The 'Cost Details' section includes fields for Assets Cost Price (\$), Less Deposit (\$), and Total (\$). The 'Payment method' section is for selecting a payment method.

2. Once the report is “Completed”, the status will show “**PSI: Ready to Start**”. By clicking on the “” icon, you can start the PSI generation process.

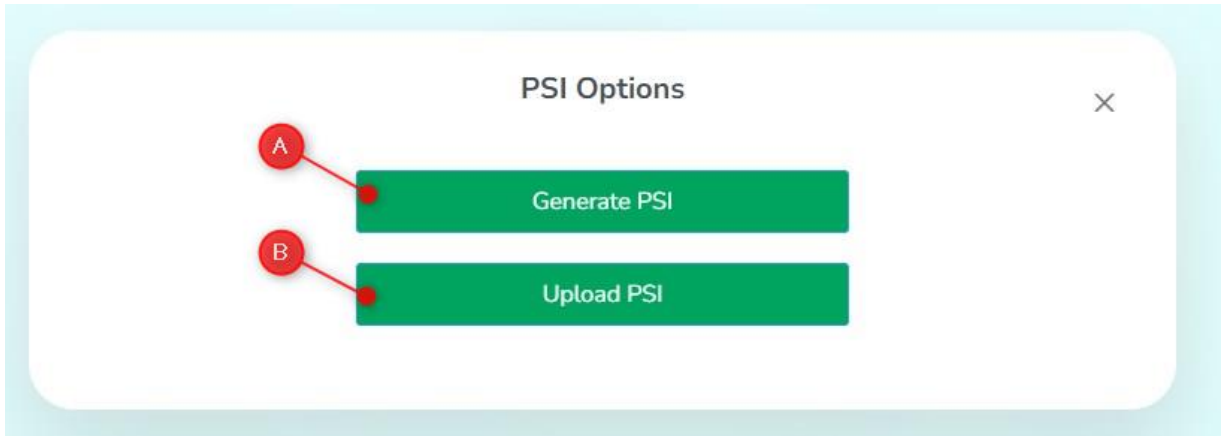
The screenshot shows the 'Inspections' table. The table has columns for Inspection ID, Company Name, Initiator Name, Asset Type, Buyer Name, Seller Name, Last Modified Date, and Status. A row is highlighted with a green bar and the status 'Completed' and 'PSI: Ready to Start'. A green arrow points to a document icon in the actions column, which opens a 'Private Sale Invoice' modal.

You can also start the process from Completed tab by clicking Three dots and then “**Generate PSI**”.

The screenshot shows the 'Completed Inspections' table. The table has columns for Seller Name, Asset Type, Initiator Name, Lender Ref, Inspection ID, System?, and Actions. The table contains four rows of data. A green arrow points to the 'Generate PSI' option in the actions column of the second row.

Seller Name	Asset Type	Initiator Name	Lender Ref	Inspection ID	System?	Actions
Sayem Shakir	Boat No Trailer	Sayem Shakir	VM	5454	Yes	  
Lara Hillington	Motor Vehicle	Rafia Info	VM	4097	No	    
Rachna Test Upload	Motor Vehicle	Rachna Test	VM2345	355	No	  
Stephen Vuong	Motor Vehicle	Rafia Info	VM	420	No	  

3. Next, you can proceed to select one of the below options, as applicable.
  - A. **Generate PSI**- Select this option when you want to use the predefined template, which will pre-populate the data collected from Asset report and PPSR.
  - B. **Upload PSI**- Upload your company’s PSI template and add the signature box on it to specify where you want the seller to submit their e-sign.



When you chose “**Generate PSI**”,

- Goods Description will be pre-populated with data from PPSR and Asset report.
- Cost details will be pre-populated based on the initial input you provided while creating the inspection. You can edit it at this stage, if required.
- If cost details were not provided while creating the inspection, you can provide it at this stage.
- Authority to distribute funds will be pre-populated from the “Funds destination” provided by the seller. You can also add multiple account details, if needed.
- All the pre-populated details (except goods description) can be edited.

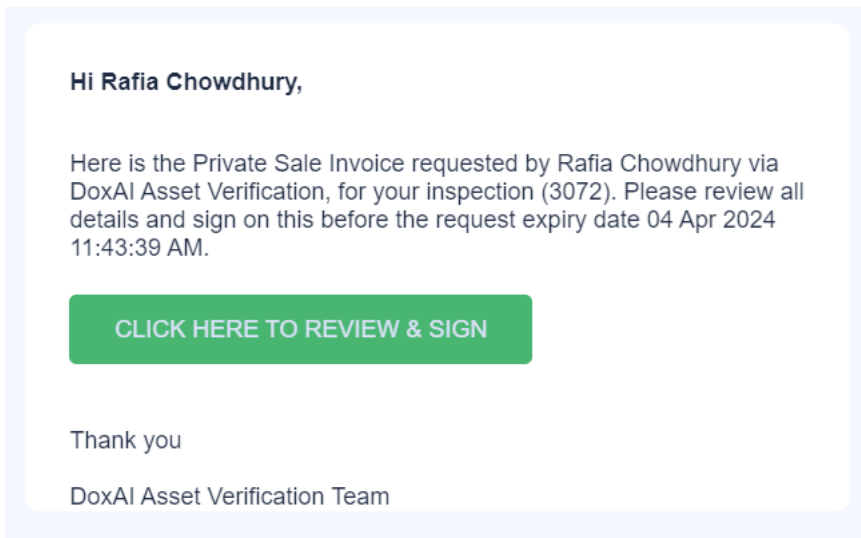
4. Once you have reviewed/edited and finalized the document, click on “**Initiate Signature**”.

 A screenshot of a "Private Sale Invoice" form for inspection ID 2657. The form includes fields for Date (01/05/2023), Vendor Name (Rafia C), and Address (cornelia st). It has sections for "INVOICE TO" and "DELIVERY TO" with fields for Customer Name and Address. The "GOODS DESCRIPTION" section is highlighted with a red box and contains fields for Year, Make (TOYOTA), Model (HILUX RNBSR PRMDSQ), Plate (4107644), Odometer (4555555), VIN (JT733RN8509031115), and Engine (4107644). The "AUTHORITY TO DISBURSE FUNDS" section is also highlighted with a red box and includes fields for Cost Price (\$100000), Less Deposit (\$90000), and Total (\$20000). Below this are two "Authority to Disburse Funds" sections with fields for Account Name, Account Number, and Amount. At the bottom, there are fields for Vendor Signature and Print Name (Rafia C). A red arrow points from the "Initiate Signature" button to the right.

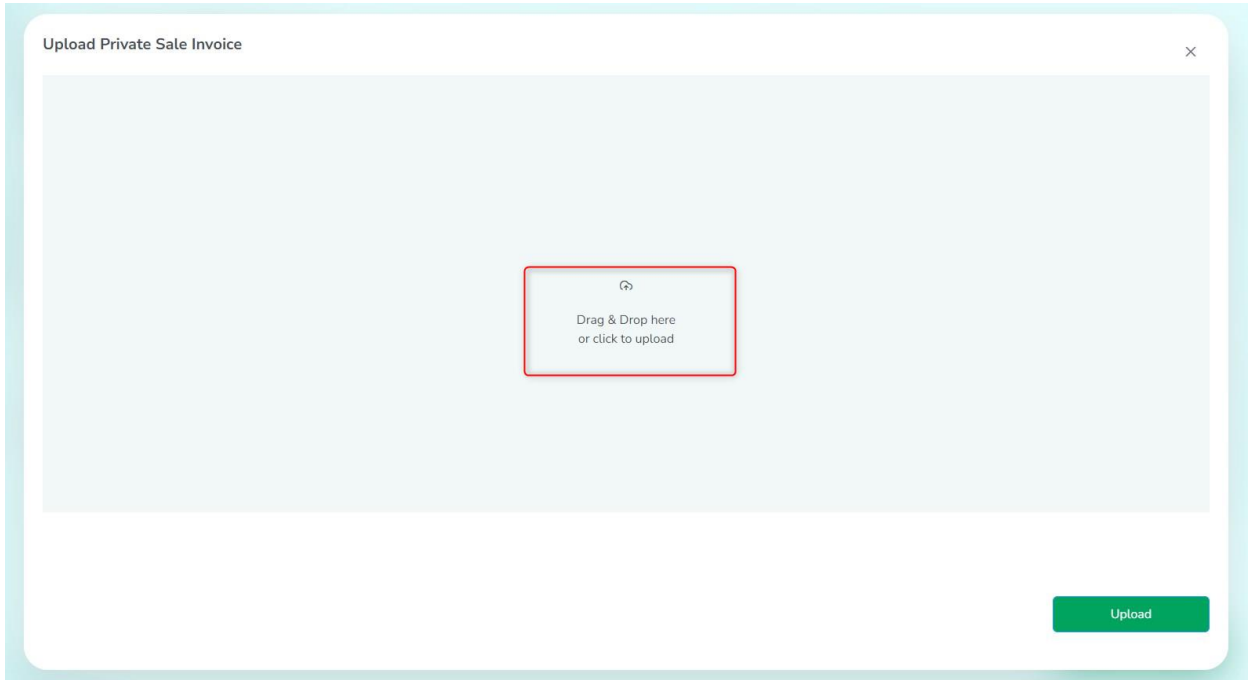
5. On click, “**Initiate Signature**”, the status of the inspection will get updated in your dashboard with “PSI: Requested”.

All Inspections								Filter by asset	Filter by broker	Filter by Status	Search
Inspection ID	Company Name	Initiator Name	Asset Type	Buyer Name	Seller Name	Last Modified Date	Status				
2660	Verimoto PSI	Verimoto PSI Admin	Motor Vehicle		Rafia C	01/05/2023 - 13:41	Completed PSI: Requested				

- In parallel, the seller of the asset will receive an email request as below to sign the PSI document.



- If you chose **“Upload PSI”**, you can drag & drop the PSI document or browse to select the file.



- Select the document and click **“Upload”**.

**Upload Private Sale Invoice** ✕

---

Phone Number

### Car (Vehicle) Information

VIN <input type="text" value="JT733RN8509031115"/>	Registration # <input type="text"/>
Make <input type="text" value="TOYOTA"/>	Model <input type="text" value="HILUX RN85R PRMDSQ"/>
Year <input type="text" value="2005"/>	Mileage <input type="text" value="4555555"/>
Color <input type="text"/>	Add-ons <input type="text"/>

**This receipt acknowledges the buyer's payment of (check one):**

A deposit being made in the amount of  Dollars

[Click here to replace](#)

Upload

- Once uploaded, drag and drop the signature field from right menu to the place where you want the seller to add the digital signature and click **“Save”**. You can add any other available field from the right menu to the document, as required, and click **“Save”**.

**Document**

DoxAI Asset Verification  
Inspection (d:3073)-Private  
Sale Invoice .pdf  
1 Pages - 133 KB

🔍 🔍 🔍 📄 🔍

### Car Sale Receipt

Date: [DATE OF SALE]

I, the undersigned seller, [SELLER NAME] set to the undersigned the following vehicle for the sum of [CAR SALE PRICE]

**Vehicle Information**

Make: [CAR MAKE]  
Model: [CAR MODEL]  
Year: [CAR YEAR]  
Vehicle Identification Number (VIN): [CAR VIN]  
Odometer Reading (Mileage): [CAR MILEAGE]

The undersigned seller affirms that the above information about this vehicle is accurate to the best of their knowledge.

The undersigned buyer acknowledges receipt of the above vehicle in exchange for the sum of [CAR SALE PRICE], being the price agreed by the buyer with the seller for the above-named vehicle, receipt of which the seller hereby acknowledges.

If it understood the vehicle is sold as seen, inspected, and approved by the buyer without any representations, warranties, or conditions expressed or implied whatsoever.

**[SELLER NAME] (Seller)**

Signature: \_\_\_\_\_  
Telephone No: \_\_\_\_\_  
Address: \_\_\_\_\_

**[BUYER NAME] (Buyer)**

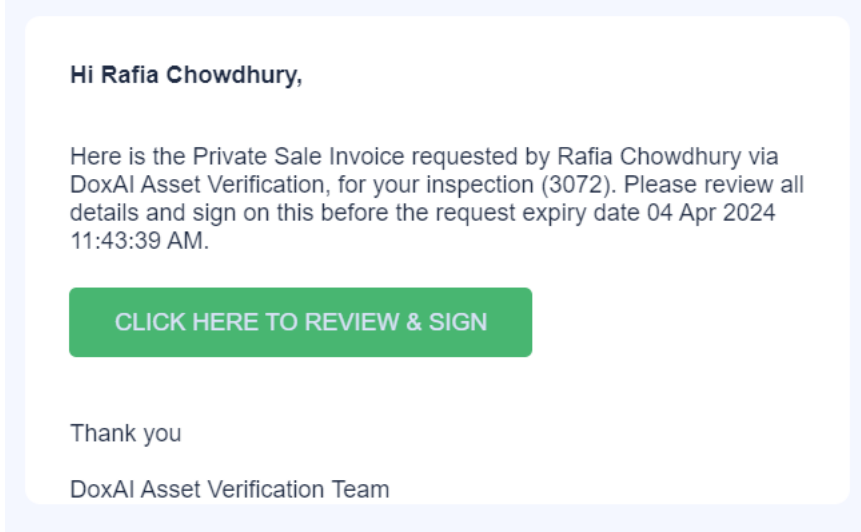
Signature: \_\_\_\_\_  
Telephone No: \_\_\_\_\_

**Choose the fields by roles**

Rafia Chowdhury

- Signature
- Email
- Full name
- Date
- Date and Time
- Initial
- Stamp
- Company
- Title
- Text
- Checkbox

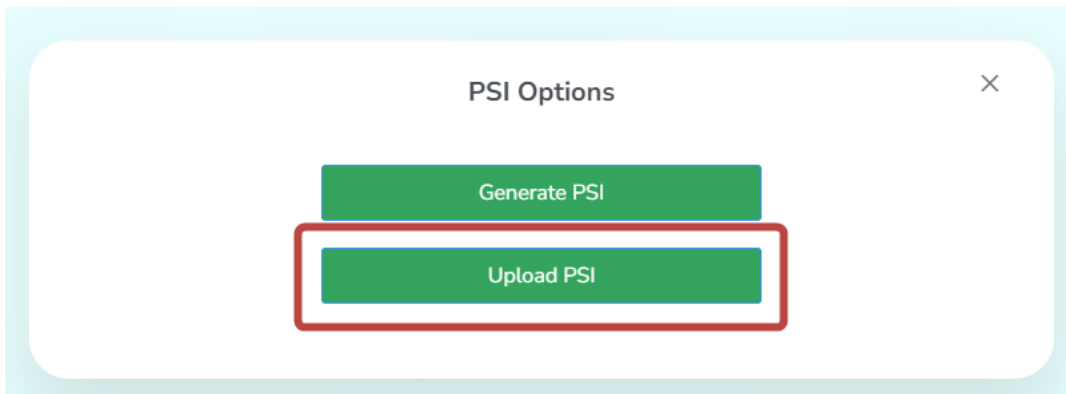
10. Seller will receive an email with a link to sign the PSI document, as shown in step 6 above.



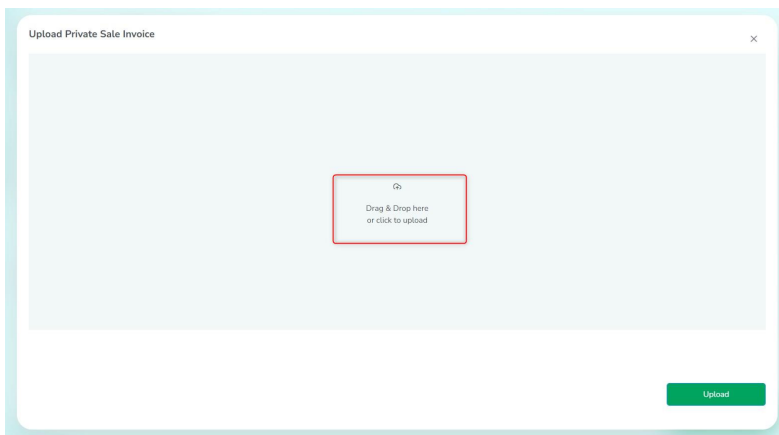
### Can I upload my PSI document/template for seller's acknowledgement and signature?

Yes, you can upload your company defined PSI document and send it to seller for acknowledgement and digital signature. While creating the request for PSI,

1. Choose the "Upload PSI" option in the below screen.



2. Next, you can drag & drop your document or browse to select the file.





3. Select the document and click **“Upload”**.

Upload Private Sale Invoice

Phone Number \_\_\_\_\_

### Car (Vehicle) Information

VIN JT733RN8509031115 Registration # \_\_\_\_\_  
 Make TOYOTA Model HILUX RN85R PRMDSQ  
 Year 2005 Mileage 45555555  
 Color \_\_\_\_\_ Add-ons \_\_\_\_\_

This receipt acknowledges the buyer's payment of (check one):

A deposit being made in the amount of 900000 Dollars

[Click here to replace](#)

**Upload**

4. Once uploaded, drag and drop the signature field from right menu to the place where you want the seller to add the digital signature and click **“Save”**. You can add any other available field from the right menu to the document, as required, and click **“Save”**.

Document

DoxAI Asset Verification Inspection (Id:3073)-Private Sale Invoice.pdf  
3 Pages - 133 kB

### Car Sale Receipt

Date: [DATE OF SALE]  
 I, the undersigned seller, [SELLER NAME] sell to the undersigned the following vehicle for the sum of [CAR SALE PRICE].

Vehicle Information

Make: [CAR MAKE]  
 Model: [CAR MODEL]  
 Year: [CAR YEAR]  
 Vehicle Identification Number (VIN): [CAR VIN]  
 Odometer Reading (Mileage): [CAR MILEAGE]

The undersigned seller affirms that the above information about this vehicle is accurate to the best of their knowledge.

The undersigned buyer acknowledges receipt of the above vehicle in exchange for the sum of [CAR SALE PRICE], being the price agreed by the buyer with the seller for the above-named vehicle, except of which the seller hereby acknowledges.

It is understood that the vehicle is sold as seen, tested, and accepted by the buyer without any representations, warranties, or conditions expressed or implied whatsoever.

[SELLER NAME] (Seller)  
 Signature: \_\_\_\_\_  
 Telephone No: \_\_\_\_\_  
 Address: \_\_\_\_\_

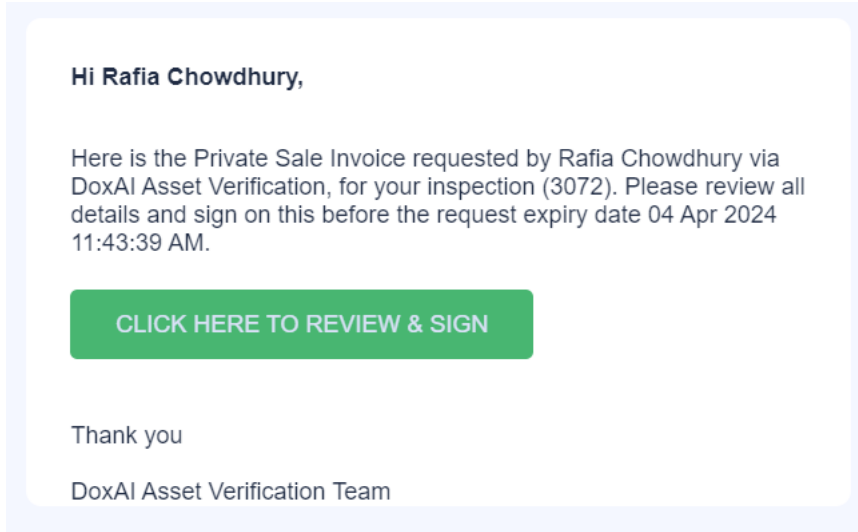
[BUYER NAME] (Buyer)  
 Signature: \_\_\_\_\_  
 Telephone No: \_\_\_\_\_

Choose the fields by roles

Rafia Chowdhury

- Signature
- Email
- Full name
- Date
- Date and Time
- Initial
- Stamp
- Company
- Title
- Text
- Checkbox

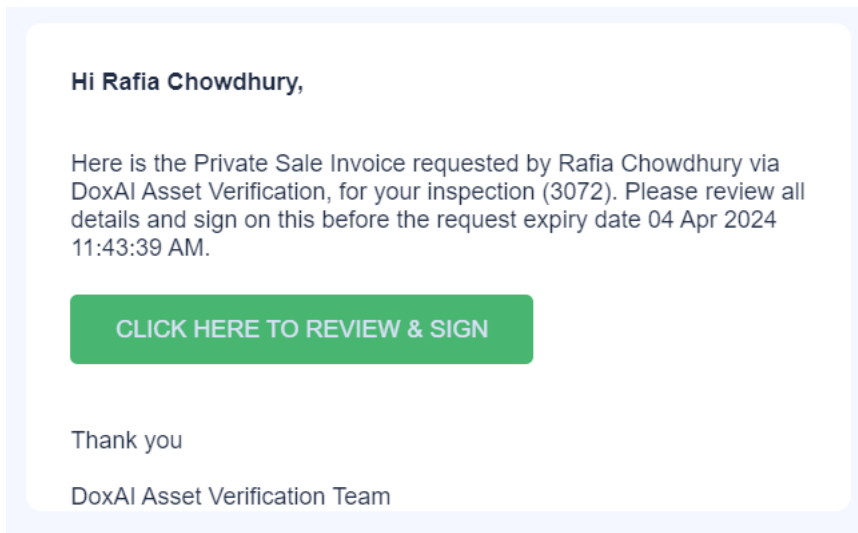
5. Seller will receive an email with a link to sign the PSI document.



6. You can reupload the document after submitting it, however, on reupload, you will need to resubmit the request so that seller receives an updated link. The seller will receive a new email with the updated link in this case.

### What are the steps for seller/vendor for PSI request with signature?

1. Once the PSI request is created, the seller of the asset will receive an email, as below, to sign the PSI document.



2. On click "**CLICK HERE TO REVIEW & SIGN**", seller will be re-directed to the login screen. On click "Login", Seller will receive a 6-digit One Time Pin in their email address.

### Login

Inspection ID

Email \*

**Login**

If you are facing issue to login, please click Ctrl + F5. If you are still unable to login, please contact our support team via the Chat icon at the bottom right corner OR via [support@verimoto.com](mailto:support@verimoto.com)

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### Insert the code we had sent to your Email

Don't receive the code after 30 seconds?  
Click here to re-send

One Time Pin


**Login**

- After providing the OTP, seller will be redirected to below page to agree to use electronic records and signature to review the document. Seller will tick the checkbox to agree and proceed to review the PSI document by clicking the **Review Document** button.



**DOXAI ASSET VERIFICATION has requested you to review and sign "DoxAI Asset Verification Inspection (Id:3074)- Private Sale Invoice .pdf"**

You will be asked for the data below:

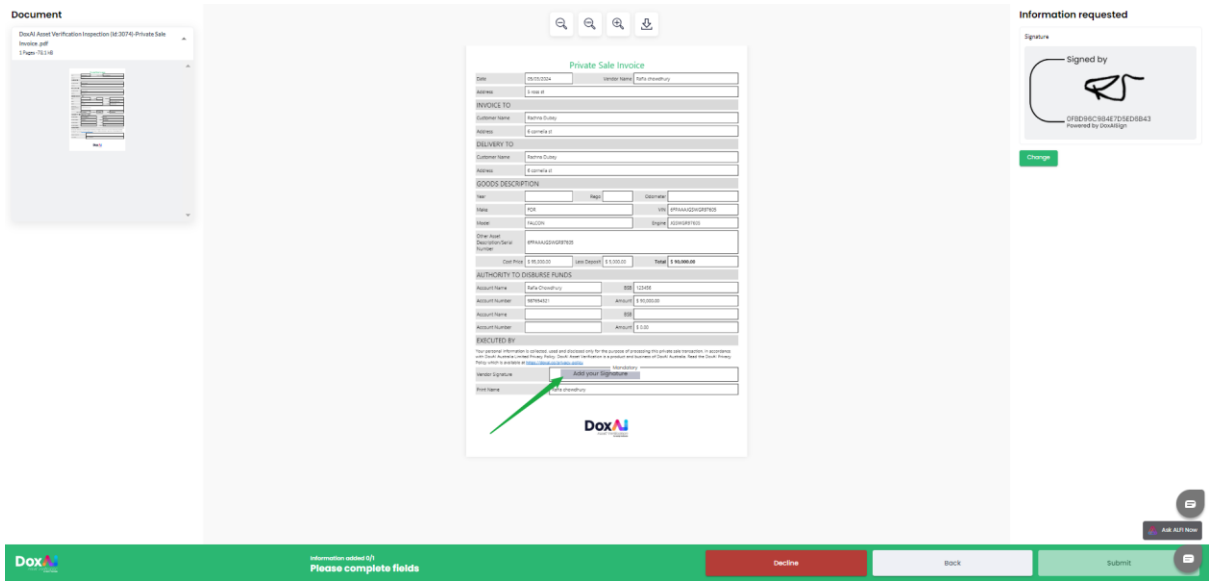
 **Signature**

Please read the [Electronic Record and Signature Disclosure](#)

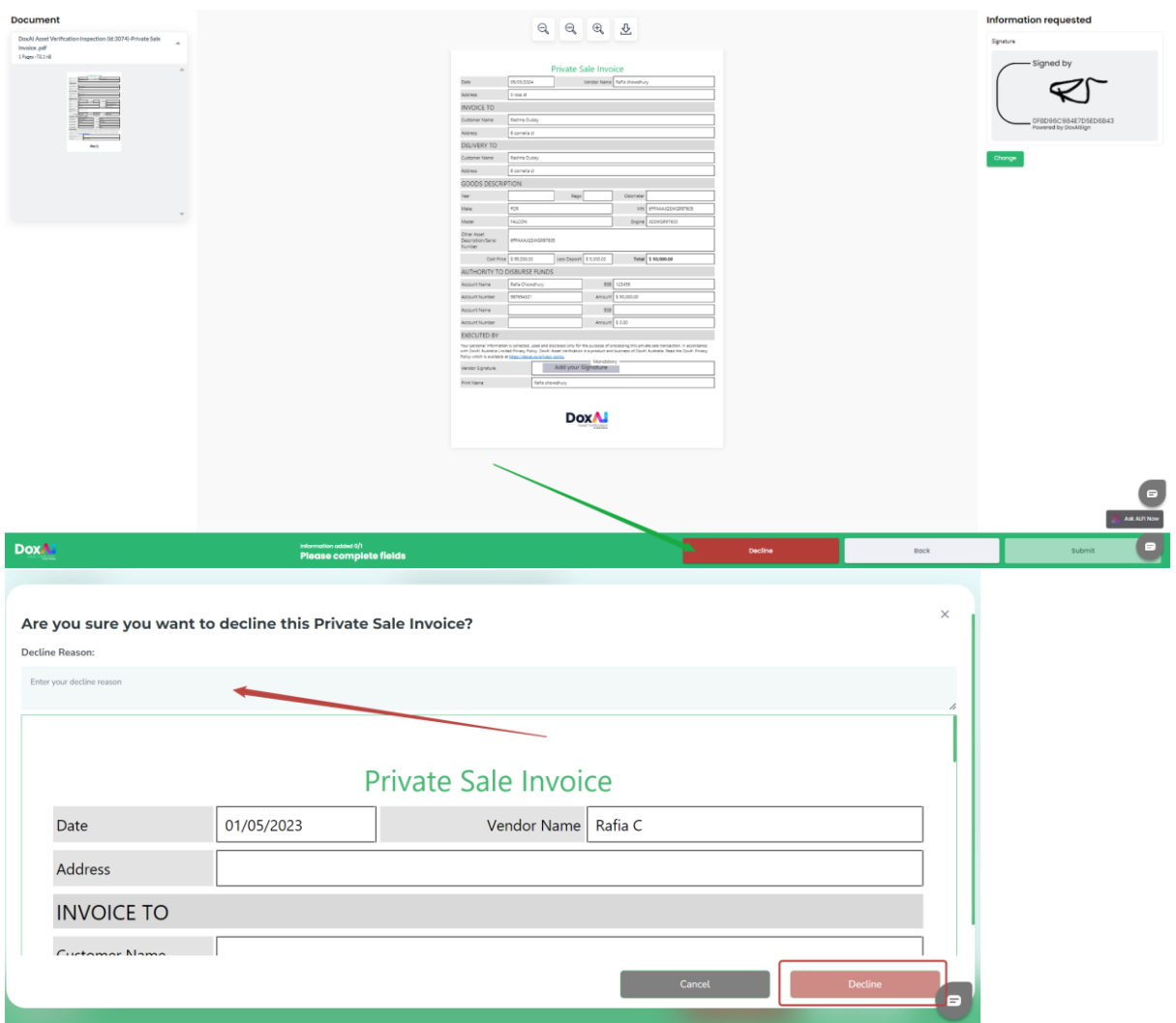
I agree to use electronic records and signatures.

**Review Document**

- Seller can now review all the details and can either agree and sign or decline if any of the details need modification before they sign the document.
- Case 1 | Seller agrees with all details and provides digital signature:** In this case, seller will proceed to add/draw/upload their digital signature and submit the signed document document.




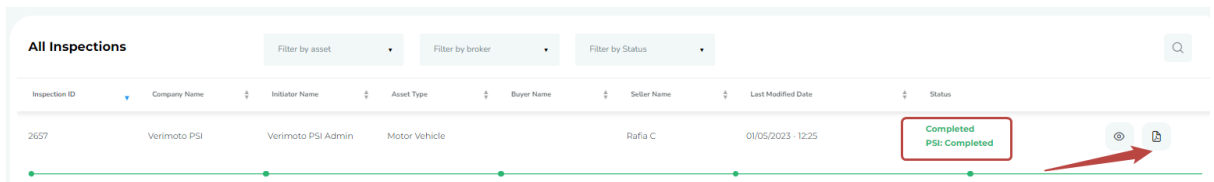
6. **Case 2 | Seller disagrees with some or all details and Decline:** In this case, the seller can click “Decline” and mention the reason.



## How do I track the status of PSI?


1. If PSI is signed and submitted by the seller, the status of the inspection will get updated in your

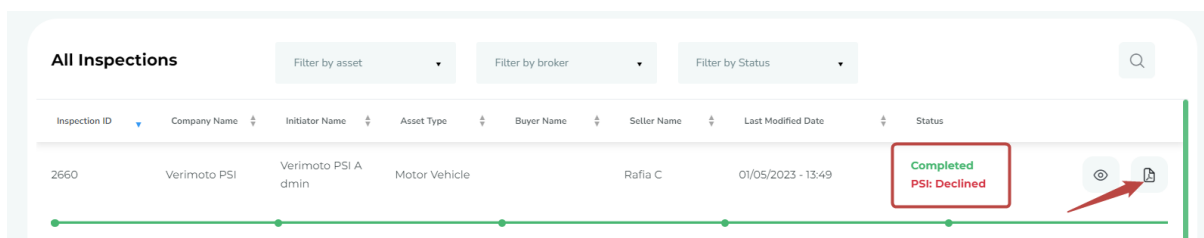
dashboard with **“PSI: Completed”**. Click on the “” icon to view & download the signed PSI document.



The screenshot shows a table with the following data:


Inspection ID	Company Name	Initiator Name	Asset Type	Buyer Name	Seller Name	Last Modified Date	Status
2657	Verimoto PSI	Verimoto PSI Admin	Motor Vehicle		Rafia C	01/05/2023 - 12:25	Completed PSI: Completed

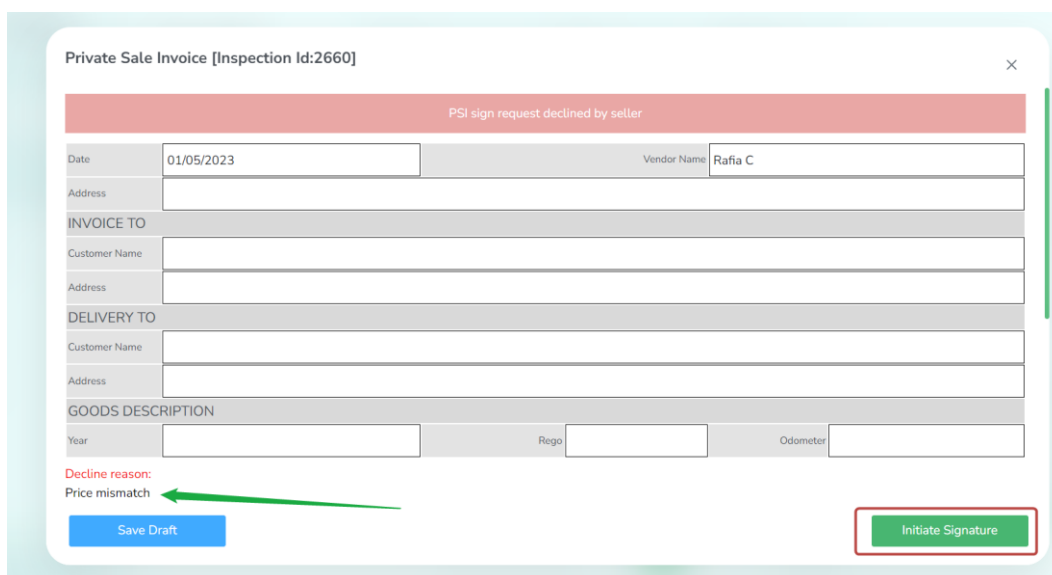
2. If PSI is declined by the seller, the status of the inspection will also get updated as **“PSI: Declined”** in your dashboard. By clicking on the “” icon, you can view the reasons for decline.



The screenshot shows a table with the following data:

Inspection ID	Company Name	Initiator Name	Asset Type	Buyer Name	Seller Name	Last Modified Date	Status
2660	Verimoto PSI	Verimoto PSI Admin	Motor Vehicle		Rafia C	01/05/2023 - 13:49	Completed PSI: Declined

3. By clicking on the “” icon, you can view the reasons for decline. You can review and update the details based on declined reason and click on **“Initiate Signature”** to re-initiate the process and send email to the seller with the updated document link.



The form displays the following information:

- Header:** Private Sale Invoice [Inspection Id:2660]
- Status:** PSI sign request declined by seller
- Fields:** Date (01/05/2023), Vendor Name (Rafia C), Address, INVOICE TO (Customer Name, Address), DELIVERY TO (Customer Name, Address), GOODS DESCRIPTION (Year, Rego, Odometer).
- Decline reason:** Price mismatch
- Buttons:** Save Draft, Initiate Signature

4. If the PSI was generated via portal (not uploaded), you can view the rejected reasons for specific fields and update the data in the portal to resend the request.

-Click on the “X” to view the rejected reason of that field.

Private Sale Invoice [Inspection Id:2824]

PSI sign request declined by seller

Note: Please click on "X" button to view the rejected reasons and update the data.

Date	26/05/2023	X	Vendor Name	Rachna PSIDemo
Address				
INVOICE TO				
Customer Name	BuyerName			
Address	Abc			
DELIVERY TO				

- Add the updated data in the “New data” field and click “Apply”.

Date

Declined Reasons:

- Change date needed

Current Data

26/05/2023

New Data

1

2

Apply

Cancel

- Once the data has been updated, click on "Initiate the Signature", and Seller will receive new request to sign the document.

Private Sale Invoice [Inspection Id:2824]



PSI sign request declined by seller

Note: Please click on "X" button to view the rejected reasons and update the data.

Date	29/05/23	X	Vendor Name	Rachna PSIDemo
Address				
<b>INVOICE TO</b>				
Customer Name	BuyerName			
Address	Abc			
<b>DELIVERY TO</b>				
Customer Name				
Address				
<b>GOODS DESCRIPTION</b>				
Year		Rego		Odometer

Save Draft
Initiate Signature

### Can seller/vendor reject the PSI requested for signature?

Yes, in case of disagreement with any of the details mentioned in the PSI document, the seller can decline the request and mention the reasons.

The seller can click "Decline".

The screenshot shows the Dox AI interface. On the left is a document viewer showing a 'Private Sale Invoice' document. In the center is a form for 'Private Sale Invoice' with fields for Date, Vendor Name, Address, INVOICE TO (Customer Name, Address), DELIVERY TO (Customer Name, Address), and GOODS DESCRIPTION (Year, Rego, Odometer). Below the form are fields for AUTHORITY TO DISBURSE FUNDS and EXCLUDED BY. On the right is an 'Information requested' panel showing a signature. At the bottom, there is a green bar with a red 'Decline' button, a grey 'Back' button, and a green 'Submit' button. A green arrow points from the 'Decline' button to the 'Private Sale Invoice' form.

Next, on the decline screen mention the reason(s) and finally, click **Decline** to submit the reasons.

Are you sure you want to decline this Private Sale Invoice?

Decline Reason:


Enter your decline reason

**Private Sale Invoice**

Date	01/05/2023	Vendor Name	Rafia C
Address			
<b>INVOICE TO</b>			
Customer Name			

Cancel Decline


## How to view/download the signed/acknowledged PSI document?

1. When PSI is signed & submitted or acknowledged & submitted by the seller, the status of the inspection will get updated in your dashboard with **“PSI: Completed”**.
2. Click on the “” icon to view & download the signed PSI document.

All Inspections

Filter by asset Filter by broker Filter by Status

Inspection ID	Company Name	Initiator Name	Asset Type	Buyer Name	Seller Name	Last Modified Date	Status
2657	Verimoto PSI	Verimoto PSI Admin	Motor Vehicle		Rafia C	01/05/2023 - 12:25	Completed PSI: Completed




3. You can also view and download the signed PSI document from the Completed tab by clicking on three dots->**“View PSI”**.


All Inspections

Filter by asset Filter by broker Filter by Status

Inspection ID	Company Name	Initiator Name	Asset Type	Buyer Name	Seller Name	Last Modified Date	Status
2657	Verimoto PSI	Verimoto PSI Admin	Motor Vehicle		Rafia C	01/05/2023 - 12:25	Completed PSI: Completed



## How to view the rejected reasons if a PSI document gets declined?

If PSI is declined by the seller, the status of the inspection will also get updated as **“PSI: Declined”** in your dashboard. By clicking on the “” icon, you can view the reasons for decline.



All Inspections								Filter by asset	Filter by broker	Filter by Status	Search
Inspection ID	Company Name	Initiator Name	Asset Type	Buyer Name	Seller Name	Last Modified Date	Status				
2660	Verimoto PSI	Verimoto PSI Admin	Motor Vehicle		Rafia C	01/05/2023 - 13:49	Completed PSI: Declined				

You can review and update the details based on declined reason and click on **“Initiate Signature”** to re-initiate the process and send email to the seller with the updated document link.

**Private Sale Invoice [Inspection Id:2660]** ✕

PSI sign request declined by seller

Date	01/05/2023	Vendor Name	Rafia C
Address			
<b>INVOICE TO</b>			
Customer Name			
Address			
<b>DELIVERY TO</b>			
Customer Name			
Address			
<b>GOODS DESCRIPTION</b>			
Year		Rego	
		Odometer	

**Decline reason:**  
Price mismatch ←

If the PSI was generated via portal (not uploaded), you can view the rejected reasons for specific fields and update the data in the portal to resend the request:

-Click on the **“X”** to view the rejected reason of that field.

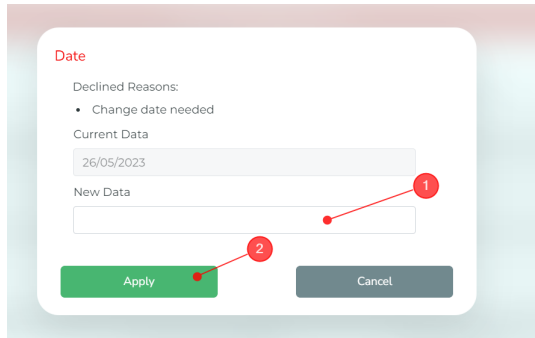
**Private Sale Invoice [Inspection Id:2824]** ✕

PSI sign request declined by seller

Note: Please click on **“X”** button to view the rejected reasons and update the data.

Date	26/05/2023	✕	Vendor Name	Rachna PSIDemo
Address				
<b>INVOICE TO</b>				
Customer Name	BuyerName			
Address	Abc			
<b>DELIVERY TO</b>				

-Add the updated data in the **“New data”** field and click **“Apply”**.



- Once the data has been updated, click on “Initiate the Signature”, and Seller will receive new request to sign the document.

Private Sale Invoice [Inspection Id:2824] ×

PSI sign request declined by seller

Note: Please click on "X" button to view the rejected reasons and update the data.

Date	29/05/23 <span style="float: right;">×</span>	Vendor Name	Rachna PSIDemo
Address			
<b>INVOICE TO</b>			
Customer Name	BuyerName		
Address	Abc		
<b>DELIVERY TO</b>			
Customer Name			
Address			
<b>GOODS DESCRIPTION</b>			
Year		Rego	Odometer

Save Draft
Initiate Signature


### How does the Private Sale Invoice (PSI) with Acknowledgement only work?

When PSI with **Get Acknowledgement only** is enabled for your company, follow the below steps.

1. While creating a new inspection, you will see an optional “Cost Details” section, which will be an input for PSI. If the cost details are not available while creating the inspection, you can provide these details when you initiate the PSI after Asset verification report is

granted/completed.













The screenshot shows the 'Create new inspection' form. The 'Inspection detail' section includes fields for Seller first name, Seller last name, Seller e-mail (Optional), Seller Mobile, Buyer first name (Optional), Buyer last name (Optional), Buyer e-mail (Optional), Buyer Mobile (Optional), Lender, Asset (Motor Vehicle), State (NSW), Inspection type (New Landing), and Lender reference. The 'Cost Details' section includes fields for Asset Cost Price (\$), Less Deposit (\$), and Total (\$). The 'Payment method' section is for selecting a payment method.

2. Once the report is “Completed”, the status will show “**PSI: Ready to Start**”. By clicking on the “” icon, you can start the PSI generation process.

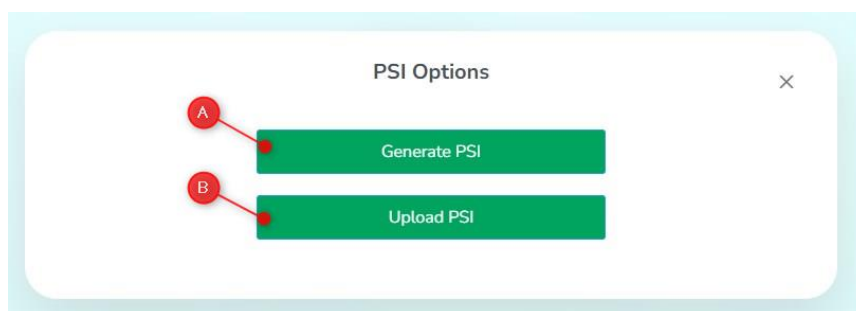
The screenshot shows the 'Inspections' table. The table has columns for Inspection ID, Company Name, Initiator Name, Asset Type, Buyer Name, Seller Name, Last Modified Date, and Status. A row is highlighted with a green bar and the status 'Completed' and 'PSI: Ready to Start'. A green arrow points to a document icon in the actions column, which has a tooltip that says 'Private Sale Invoice'.

You can also start the process from Completed tab by clicking Three dots and then “**Generate PSI**”.

The screenshot shows the 'Completed Inspections' table. The table has columns for Seller Name, Asset Type, Initiator Name, Lender Ref, Inspection ID, Reported?, and Actions. The second row is highlighted with a green bar. A green arrow points to the 'Generate PSI' option in the actions column of the second row.

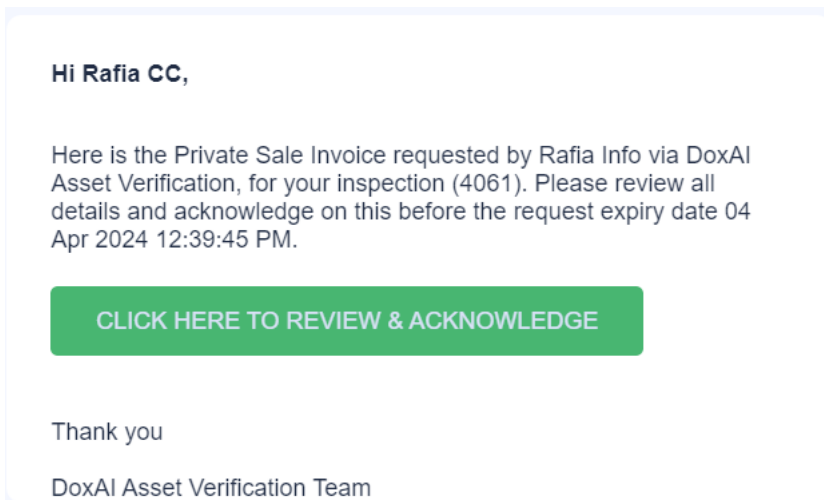
Seller Name	Asset Type	Initiator Name	Lender Ref	Inspection ID	Reported?	Actions
Sayem Shakir	Boat No Trailer	Sayem Shakir	VM	5454	Yes	  
Lara Hillington	Motor Vehicle	Rafia Info	VM	4097	No	  
Rachna Test Upload	Motor Vehicle	Rachna Test	VM2345	355	No	  
Stephan Vuong	Motor Vehicle	Rafia Info	VM	420	No	  

3. Next, you can proceed to select one of the below options, as applicable.
  - A. **Generate PSI**- Select this option when you want to use the predefined template, which will pre-populate the data collected from Asset report and PPSR.
  - B. **Upload PSI**- Upload your company’s PSI template and submit it to seller for acknowledgement.

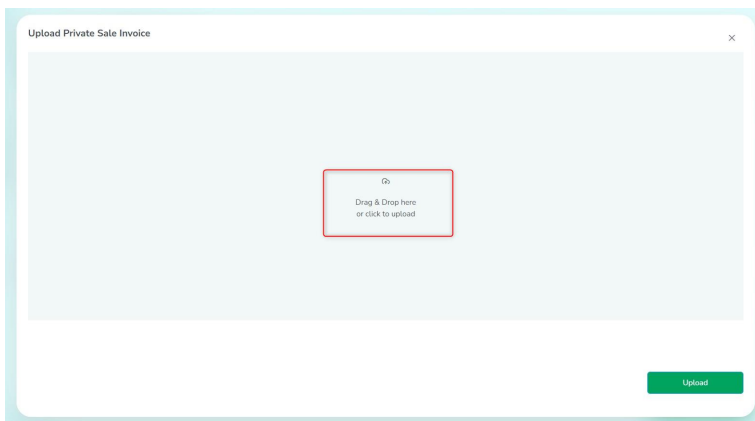


When you choose **“Generate PSI”**,

- Goods Description will be pre-populated with data from PPSR and Asset report.
  - Cost details will be pre-populated based on the initial input you provided while creating the inspection. You can edit it at this stage, if required.
  - If cost details were not provided while creating the inspection, you can provide it at this stage.
  - Authority to distribute funds will be pre-populated from the “Funds destination” provided by the seller. You can also add multiple account details, if needed.
  - All the pre-populated details (except goods description) can be edited.
4. Finally, you can review and edit the details and submit the PSI to the seller for acknowledgement.
  5. Once PSI is submitted, the seller of the asset will receive an email request as below to sign the PSI document.



6. If you chose **“Upload PSI”**, you can drag & drop the PSI document or browse to select the file.



7. Select the document and click **“Upload”**.

8. The seller of the asset will receive an email to review and acknowledge the PSI document.

### What does the seller see in case of Private Sale Invoice (PSI) with Acknowledgement only?

1. In case of PSI with acknowledgement only from seller, the seller will have a tick-box labelled with **"I Agree"** to provide acknowledgement on the document and submit the same. They will not be asked to provide their signature on the document.

2. The seller can choose to click **"Decline"** if they do not agree with the submitted details.
3. Based on seller's selection, the status will get updated for the request initiator.

## Can I enable both options for PSI with and without signature to allow the users to choose it on the go as required?

Yes, in the PSI settings you can select “Allow user to choose”. This will allow the initiator to opt for any the below options when you initiate the PSI for any completed inspection. The cost is per request and excluding GST.

The “**Generate PSI**” will give you two options as shown below.

