

Private Sale Invoice | User Guide



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How to activate Private Sale Invoice (PSI) service?

Write to support@doxai.co and mention about your interest to activate this service. Indicate whether you want to activate this service with or without digital signature. Service usage & activation fee applies.

Private Sale Invoice (PSI) can be sent to the seller to e-sign/acknowledge only when,

1. PSI is enabled for your lender company by Asset Verification admin AND
2. The Asset verification report is completed.

How to update Private Sale Invoice (PSI) preferences?

As a lender admin, you can update the PSI preference from **Settings->Company Details-> Do you want your brokers to generate Private Sale Invoice for the seller?** to allow lenders and brokers to generate PSI for your inspections. You can opt for one of the below options to enable PSI.

1. **Receive Acknowledgement +E-Signature:** Seller will acknowledge and provide digital signature in the document.
2. **Receive Acknowledgement only:** Seller will just share acknowledgement of the document.
3. **Allow user to choose:** Lender/Broker 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 Doxai Admin Panel interface. The left sidebar contains navigation links: Dashboard, Asset Verification, Usage, Inspections, Completed, New Inspection, Income & Employment Verification, Inspections Type, Brokers, Developers, Notifications, Audit, Settings, and Help. The main content area is titled 'Company details' and includes tabs for User profile, Company details, Payment details, User roles, Notification Settings, and Integration. The 'Lender information' section contains fields for Lender name, Lender company name, ACN/ABN, Lender address, Zip code, State, City, Website, Email, Lender ID, and Lender references. Below this is the 'Report customisation (optional)' section, which asks 'Do you want your brokers to generate Private Sale Invoice for the seller?'. The options are: 'Do not allow', 'Receive Acknowledgement + E-Signature - (\$4.50)', 'Receive Acknowledgement only - (\$3.20)', and 'Allow user to choose'. A red arrow points to the 'Save & Update' button at the bottom right.

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

When PSI with **Receive Acknowledgement + E-Signature** is enabled for your lender company, all lenders and brokers having visibility to your lender company will see PSI option on the completed inspections. Refer to the below detailed 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.

Create new inspection

Inspection detail

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 *
State *
Inspection type *

Lender reference *
VM

More Information


Is the Rogp already transferred on Buyer's name?
No Yes


Cost Details
For Private Sale Invoice Generation

Assets Cost Price (\$)
\$













Loro Deposit (\$)
\$

Total (\$)
\$

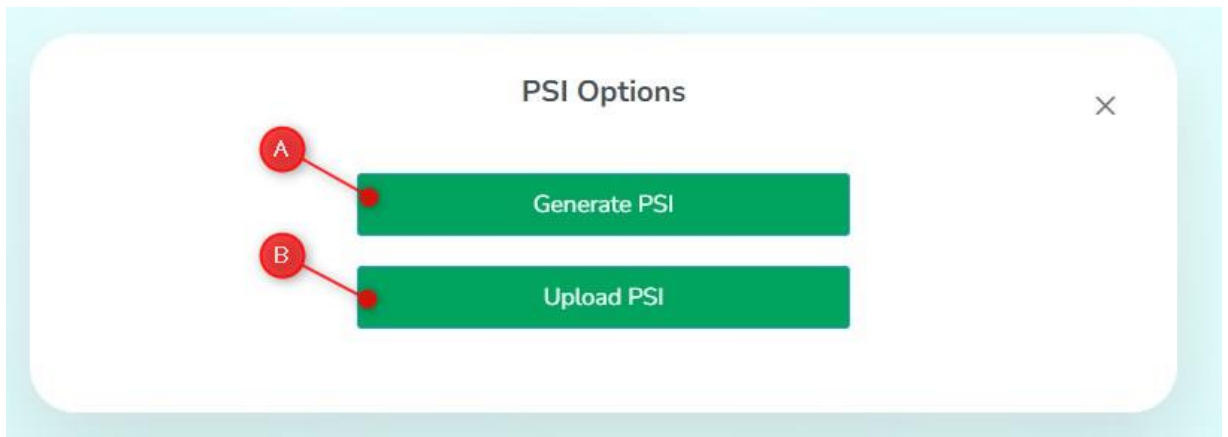
2. Once the report is “Completed”, the status will show “**PSI: Ready to Start**”. By clicking on the “” icon, you can start the PSI generation process.

Inspection ID	Company Name	Initiator Name	Asset Type	Buyer Name	Seller Name	Last Modified Date	Status	Actions
...	Completed PSI: Ready to Start	

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

Seller Name	Asset Type	Broker Name	Lender Ref	Inspection ID	Reported	Actions
Sayem Shakir	Boat No Trailer	Sayem Shakir	VM	5104	Yes	  
Lara Millington	Motor Vehicle	Rafie Info	VM	4007	No	  
Rachna Test Upload	Motor Vehicle	Rachna Test	VM2345	3001	No	  
Stephen Young	Motor Vehicle	Rafie Info	VM	4201	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**”,

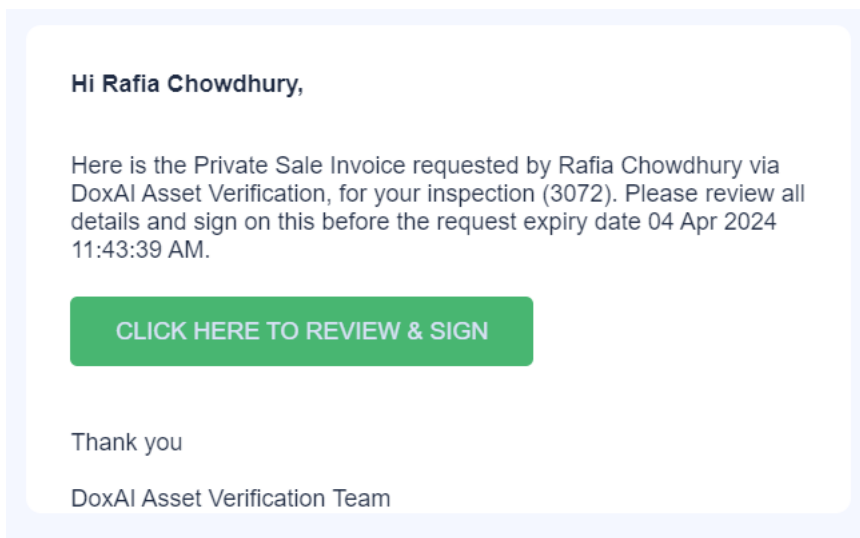
- Goods Description will be pre-populated with data from PPSR and Asset report.
 - Cost details will be pre-populated based on the initial input you provided while creating the inspection. You can edit it at this stage, if required.
 - If cost details were not provided while creating the inspection, 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**”.

The image shows a "Private Sale Invoice" form for inspection ID 2657. The form includes fields for Date (01/05/2023), Vendor Name (Rafia C), Address (cornelia st), and Invoice TO (Customer Name, Address). It also has a DELIVERY TO section. The GOODS DESCRIPTION section is highlighted with a red box and contains fields for Year, Make (TOYOTA), Model (HILUX RNBSR PRMDSQ), Other Asset Description/Serial Number (JT733RN8509031115), Engine (4107644), and Mileage (4555555). The COST section shows Cost Price (\$100000) and Less Deposit (\$90000), resulting in a Total of \$20000. The AUTHORITY TO DISBURSE FUNDS section includes fields for Account Name, Account Number, Amount, and Bank. At the bottom, there is a section for EXECUTED BY (Vendor Signature, Print Name) and a red arrow pointing to the "Initiate Signature" button.

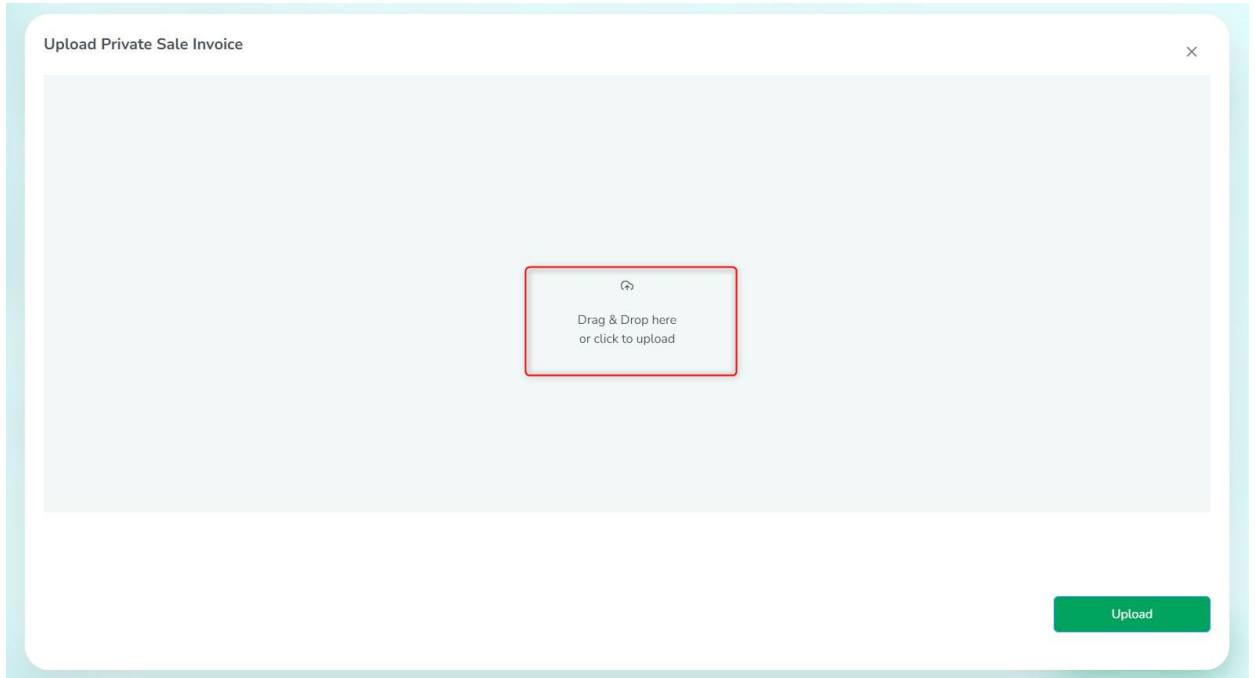
5. On click, “**Initiate Signature**”, the status of the inspection will get updated in your dashboard with “PSI: Requested”.

All Inspections									
Filter by asset		Filter by broker		Filter by Status					
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

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

- 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

1 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], using the price agreed by the buyer with the seller for the above-named vehicle, receipt of which the seller hereby acknowledges.

[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

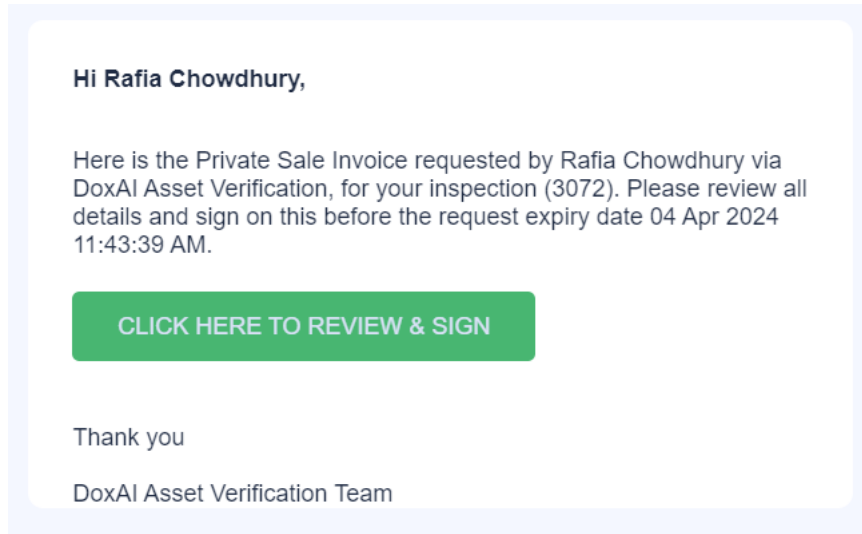
Title

Text

Checkbox

7

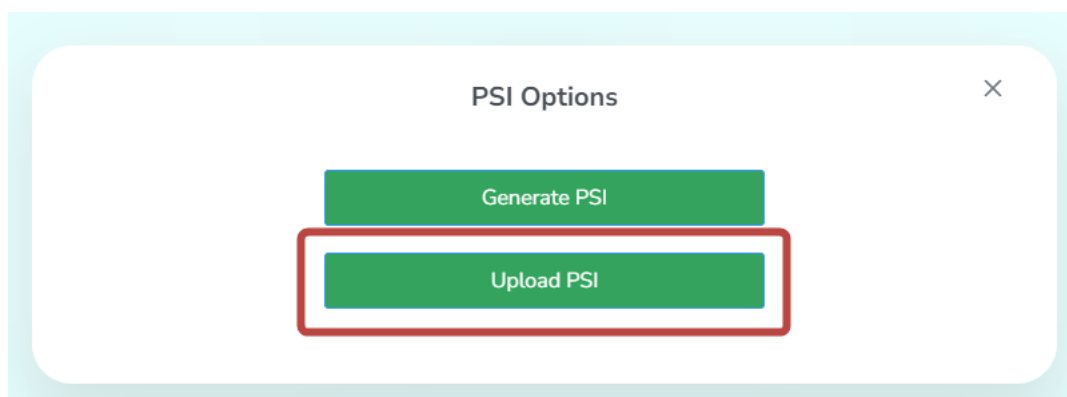
10. Seller will receive an email with a link to sign the PSI document, as shown in step 6 above.



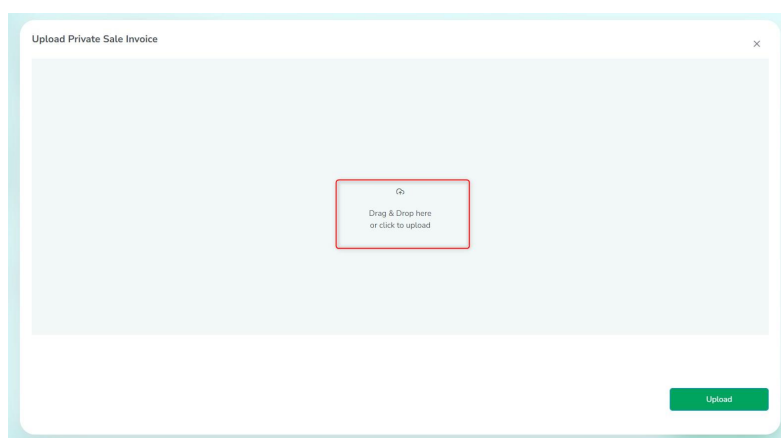
Can I upload my PSI document/template for seller's acknowledgement and signature?

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

1 Pages - 123 kB

Car Sale Receipt

Date [DATE OF SALE]

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 known 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.

It is understood that the vehicle is sold 'as seen, heard, and smelled' 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

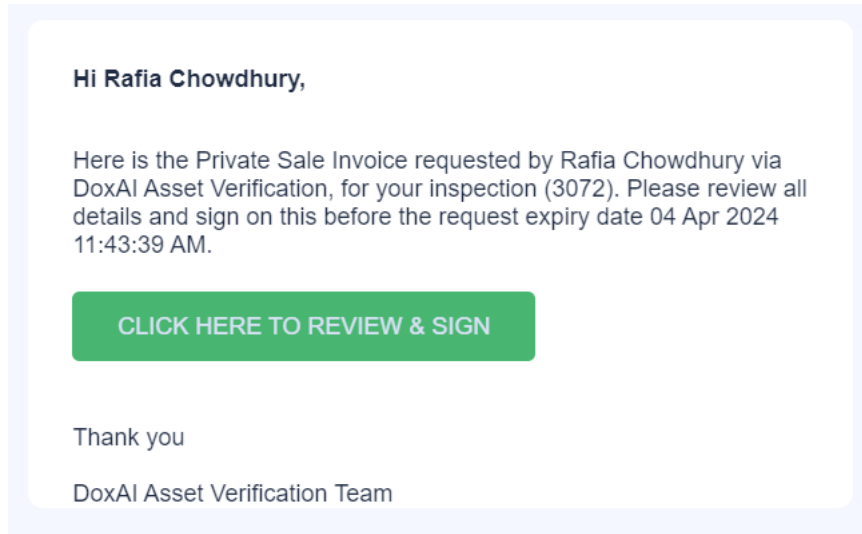
Company

Title

Text

Checkbox

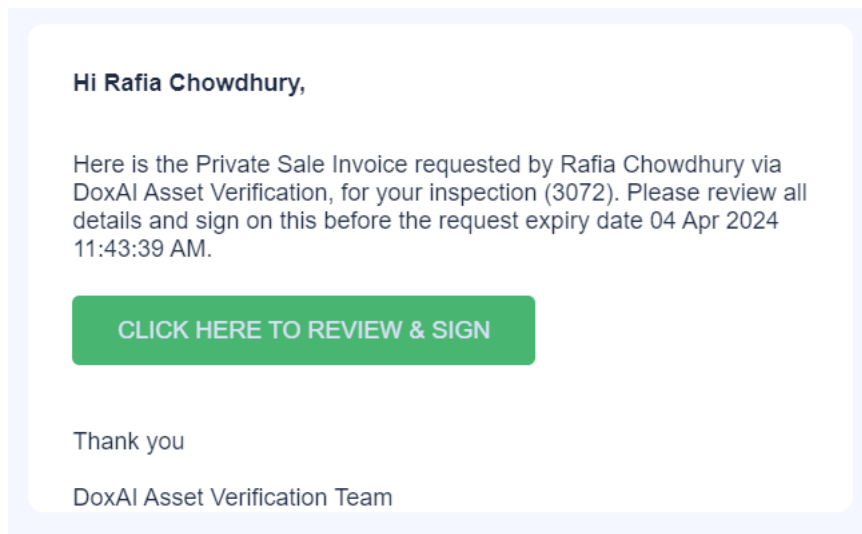
5. Seller will receive an email with a link to sign the PSI document.



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

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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.

Private Sale Invoice Sign Request

Note: To reject the data, please click on "X" button and add the reject reason

Date	05/03/2024	X	Vendor Name	Rafia Chowdhury	X
Address	1055 St	X			X
INVOICE TO					
Customer Name	Rafia Chowdhury	X			X
Address	6 Cornelia St	X			X
DELIVERY TO					
Customer Name	Rafia Chowdhury	X			X
Address	6 Cornelia St	X			X
GOODS DESCRIPTION					
Year		X	Reg		X
Make	FORD	X	Color		X
Model	FALCON	X	VIN	6PFAAJGDWGR7625	X
Other Asset Description		X	Engine	JDWGR7625	X
Serial Number	6PFAAJGDWGR7625	X			X
Cost Price	\$9000	X	Less Deposit	\$9000	X
			Total	\$9000	
AUTHORITY TO DISBURSE FUNDS					
Account Name	Rafia Chowdhury		Amount	\$9000	
Account Number	987654		Amount	\$9000	
Account Name			Amount	\$0	
Account Number			Amount	\$0	
EXECUTED BY					
Print Name	Rafia Chowdhury				

Submit

-For acknowledgement only, seller can reject the document and mention the reject reason in the text input box-

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:

INVOICE TO

Customer Name:

Cancel Decline

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.

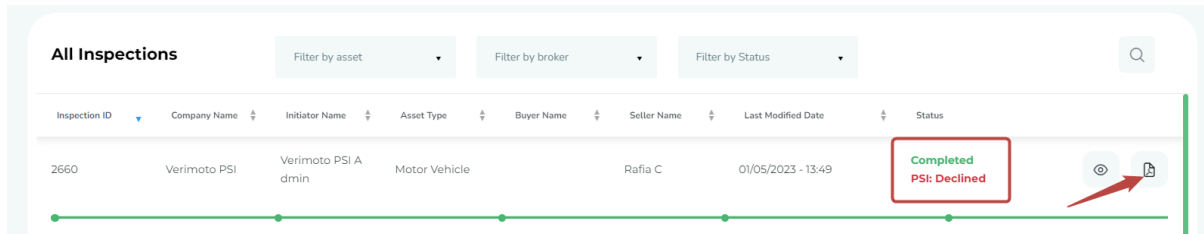
All Inspections


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

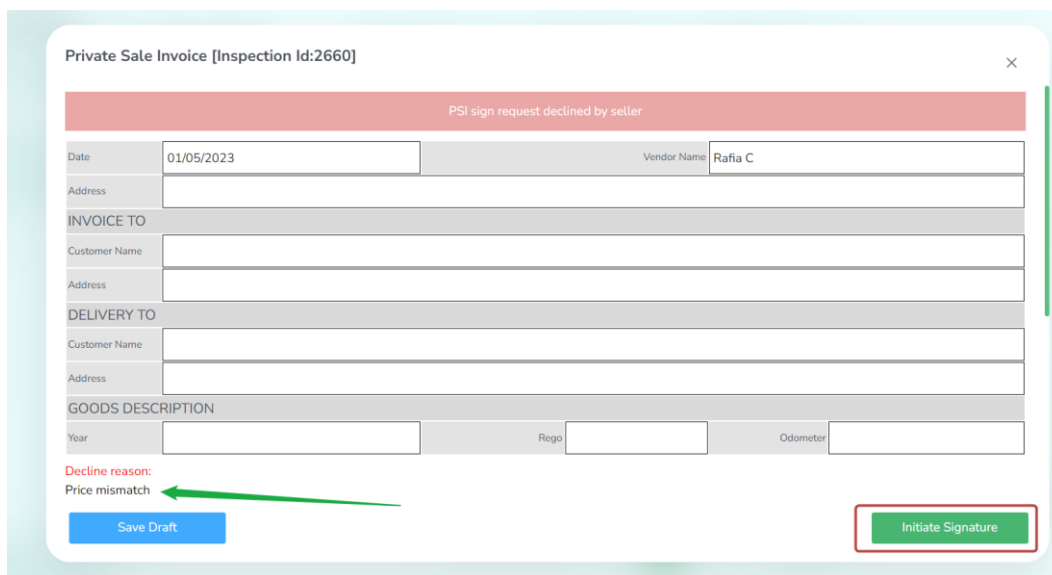
View Download

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.



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				

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.



Private Sale Invoice [Inspection Id:2660]

PSI sign request declined by seller

Date: 01/05/2023 Vendor Name: Rafia C

Address:

INVOICE TO

Customer Name:

Address:

DELIVERY TO

Customer Name:

Address:

GOODS DESCRIPTION

Year: Rego: Odometer:

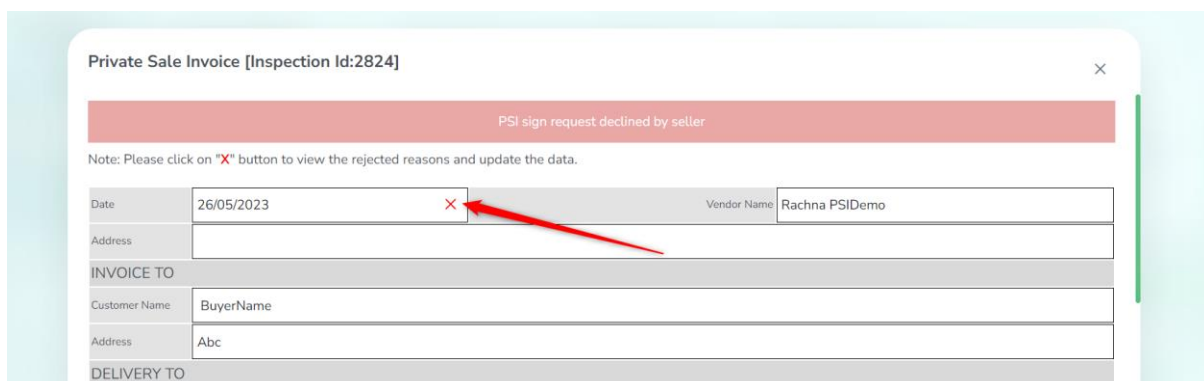
Decline reason:
Price mismatch

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

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	×	Vendor Name	Rachna PSIDemo
Address				
INVOICE TO				
Customer Name	BuyerName			
Address	Abc			
DELIVERY TO				
Customer Name				
Address				
GOODS DESCRIPTION				
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**”.

Document
Dox AI Asset Verification Inspection (01/2024) - Private Sale
Invoice.pdf
1 Page - 12/1/24

Information requested
Signature
Signed by
OFFICIAL/SALE/TO/ED/01843
Created by Dox AI
Change

Private Sale Invoice

Date: 01/05/2024 Vendor Name: Rafia C

INVOICE TO
Customer Name: Rafia C
Address: 01/05/2024

DELIVERY TO
Customer Name: Rafia C
Address: 01/05/2024

GOODS DESCRIPTION
Item: 01/05/2024 Quantity: 01/05/2024
Type: PDR Size: 01/05/2024 Price: 01/05/2024
Color: 01/05/2024 Engine: 01/05/2024
Other Asset Description: 01/05/2024
Item Price: 01/05/2024 Item Weight: 01/05/2024 Total: 01/05/2024

AUTHORITY TO DISBURSE FUNDS
Account Name: Rafia C
Account Number: 01/05/2024
Account Name: 01/05/2024
Account Number: 01/05/2024
Account Name: 01/05/2024
Account Number: 01/05/2024

RECEIVED BY
Your personal information is shared, used and stored only for the purpose of processing the private sale transaction. It is requested that you do not share this information with any third party. Your signature is required to complete the transaction. Please see our Privacy Policy which is available at [https://www.dox.ai/privacy-policy](#)

Enter Signature: Add your Signature
Signature: Rafia C

Dox AI

Decline **Back** **Submit**

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:

INVOICE TO

Customer Name:

Cancel **Decline**

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

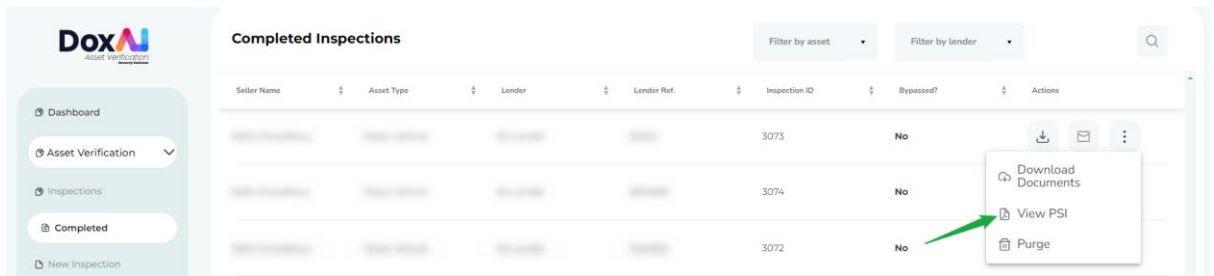
1. When PSI is signed & submitted or acknowledged & submitted by the seller, the status of the inspection will get updated in your dashboard with **"PSI: Completed"**.
2. Click on the " " icon to view & download the signed PSI document.

All Inspections


Filter by asset Filter by broker Filter by Status

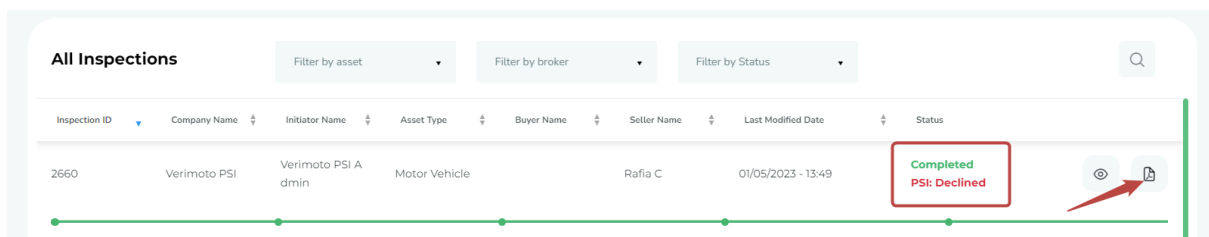
Inspection ID	Company Name	Initiator Name	Asset Type	Buyer Name	Seller Name	Last Modified Date	Status
2657	Verimoto PSI	Verimoto PSI Admin	Motor Vehicle		Rafia C	01/05/2023 - 12:25	Completed PSI: Completed

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



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.



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.

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

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:

INVOICE TO

Customer Name: BuyerName

Address: Abc

DELIVERY TO

Customer Name:

Address:

GOODS DESCRIPTION

Year: Rego: Odometer:


Save Draft Initiate Signature

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

When PSI with **Receive Acknowledgement only** is enabled for your lender 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.

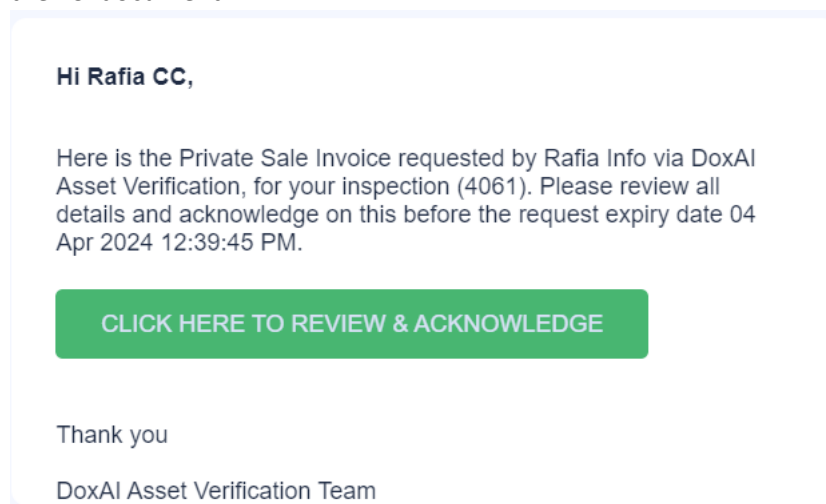
- Once the report is “Completed”, the status will show “**PSI: Ready to Start**”. By clicking on the “” icon, you can start the PSI generation process.

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

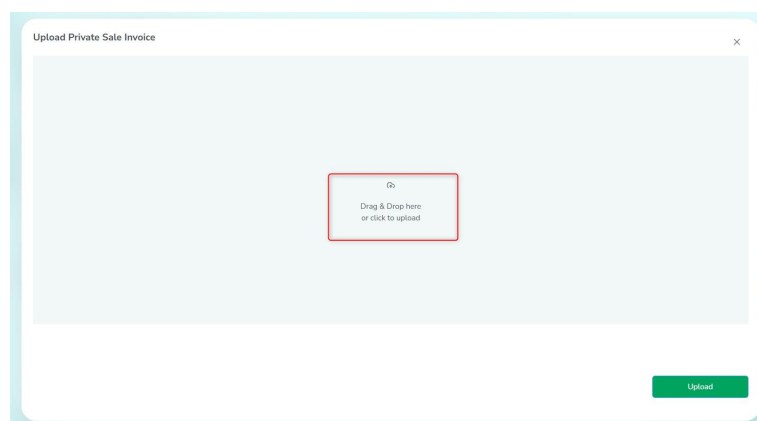
- Next, you can proceed to select one of the below options, as applicable.
 - Generate PSI**- Select this option when you want to use the predefined template, which will pre-populate the data collected from Asset report and PPSR.
 - Upload PSI**- Upload your company’s PSI template and submit it to seller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

Upload Private Sale Invoice

Phone Number

Car (Vehicle) Information

VIN JT733RN8509031115 Registration #

Make TOYOTA Model HILUX RN85R PRMDSQ

Year 2005 Mileage 4555555

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](#)

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.

Dox Private Sale Invoice

Private Sale Invoice

Date 05/03/2024 Vendor Name Rafia CC

Address

INVOICE TO

Customer Name

Address

DELIVERY TO

☐ I Agree [Decline](#) [Submit](#)

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 lenders/brokers 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.

