

# 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>What are the steps for seller/vendor for PSI request with signature?.....</b>	<b>7</b>
<b>How do I track the status of PSI? .....</b>	<b>10</b>
<b>How to view the rejected reasons if a PSI document gets declined? .....</b>	<b>12</b>
<b>How to view/download the signed/acknowledged PSI document? .....</b>	<b>13</b>
<b>How does the Private Sale Invoice (PSI) with Acknowledgement only work? .....</b>	<b>13</b>
<b>Can I request both Buyer and Seller to e-sign the document? .....</b>	<b>13</b>
<b>Can I reopen a signed PSI and resend it?.....</b>	<b>14</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.

You can also opt to automatically send the PSI sign request as soon as the report is completed. Additionally, you can choose whether the Buyer's signature should be mandatory or optional on the invoice.

### Permissions for Private Sale Invoice:

Do you want your brokers to generate Private Sale Invoice for the 'No Lender' Inspections?

- Do not allow
- Receive Acknowledgement + E-Signature - (\$4.50 - Excluding Tax) ⓘ  
(The monthly invoice will include the PSI request charges at a rate of \$4.50 per request.)
- Receive Acknowledgement only - (\$3.20 - Excluding Tax) ⓘ  
(The monthly invoice will include the PSI request charges at a rate of \$3.20 per request.)
- Allow user to choose  
(The monthly invoice will include the PSI request charges at a rate of either \$4.50 or \$3.20 per request, based on the option selected at runtime.)

Do you want to automate Private Sale Invoice for the 'No Lender' Inspections?

- Do not automate
- All requested inspections

Would you like to include the purchaser's signature in the Private Sale Invoice?  
NOTE: Purchaser's signature is applicable only for the Acknowledgement + ESignature.

- Not required
- Optional (Initiator may include or exclude the buyer's signature)
- Mandatory (Buyer's signature is required)

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

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

1. When creating a new inspection, the "More Information" section allows you to enter optional details about the seller:

"Does the seller have an ABN?" If answered Yes, the provided ABN will be populated in the PSI.

"Is the seller registered for GST?" If answered Yes, the "Cost Details" section of the PSI will display inclusive GST. In "Generate PSI" flow, system will generate a Tax Invoice (instead of private sale invoice).

### More Information

Does this seller have ABN?

No  Yes

Seller's ABN

68687878007


Is seller registered for GST?

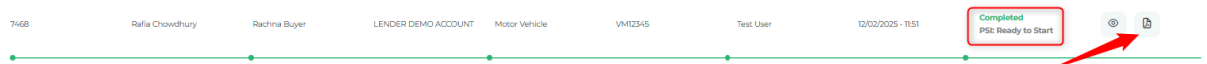
No  Yes

- You will also have 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.

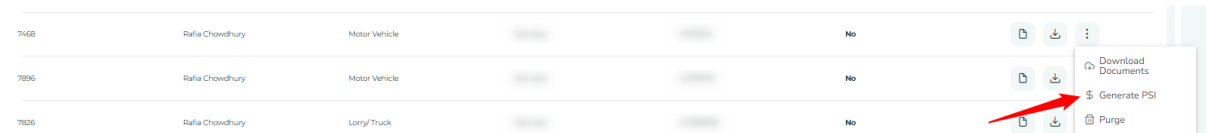
**Cost Details**  
For Private Sale Invoice Generation

Assets Cost Price (\$)	Less Deposit (\$)	Total (\$)
<input type="text"/>	<input type="text"/>	<input type="text"/>

- 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.

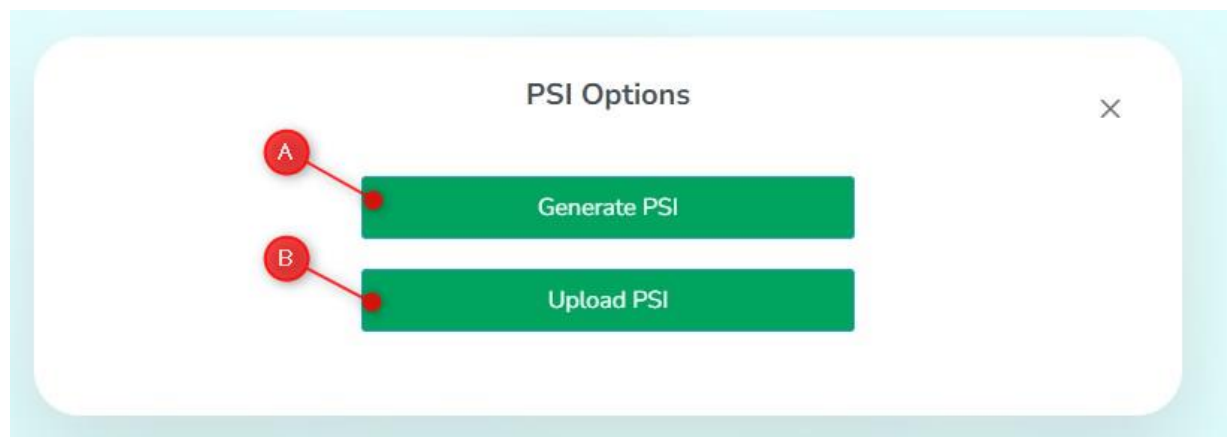


You can also start the process from Completed tab by clicking Three dots and then “**Generate PSI**”.



- 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 verification report and PPSR.
- 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.



**Generate PSI process-**

When you chose “**Generate PSI**”,

- Asset Description will be pre-populated with data from PPSR and Asset verification 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.
- If payout letter was submitted, the Financier and payee amount will get populated from the inspection report.
- All the pre-populated details (except asset description) can be edited.
- If seller is registered for GST, a Tax Invoice will get generated.

1. Once you have reviewed/edited and finalised the document, click on “Initiate”.

**Private Sale Invoice**

Vendor Name	Rafia Chowdhury	Issue Date	06/09/2024
Address	B comelia st		
Contact Details	+61 492 598 256	rafiac2.24@gmail.com	
<b>INVOICE TO (Purchaser's Details)</b>			
Customer Name	Rachna Dubey		
Address	B comelia st		
<b>DELIVERY TO</b>			
Customer Name	Rachna Dubey		
Address	B comelia st		
<b>ASSET DESCRIPTION</b>			
Year of Manufacture		Year/Month of compliance	2016-02
Range	CH604T	Odometer	78000
Make	FSR	VIN	SFPAAA455WGR07605
Model	FALCORN	Engine	200WGR07605
Asset Description / Serial Number	SFPAAA455WGR07605	State	NSW
	Cost Price: \$ 90000	Lease Deposit: \$ 8000	Total: \$ 90000
<b>AUTHORITY TO DISBURSE FUNDS</b>			
Account Name	Rafia Chowdhury	BIS	789347
Account Number	66792209832	Amount	\$ 81000
Account Name	Welpac	BIS	907766
Account Number	09876567890	Amount	\$ 9000
<b>TERMS AND CONDITIONS</b>			
Your personal information is collected, used and disclosed only for the purpose of processing this private sale transaction, in accordance with Dox AI Australia Limited Privacy Policy. Dox AI Asset Verification is a product and business of Dox AI Australia. Read the Dox AI Privacy Policy which is available at <a href="https://dox.ai/privacy-policy">https://dox.ai/privacy-policy</a>			
Vendor Name	Rafia Chowdhury		

Save Draft Initiate

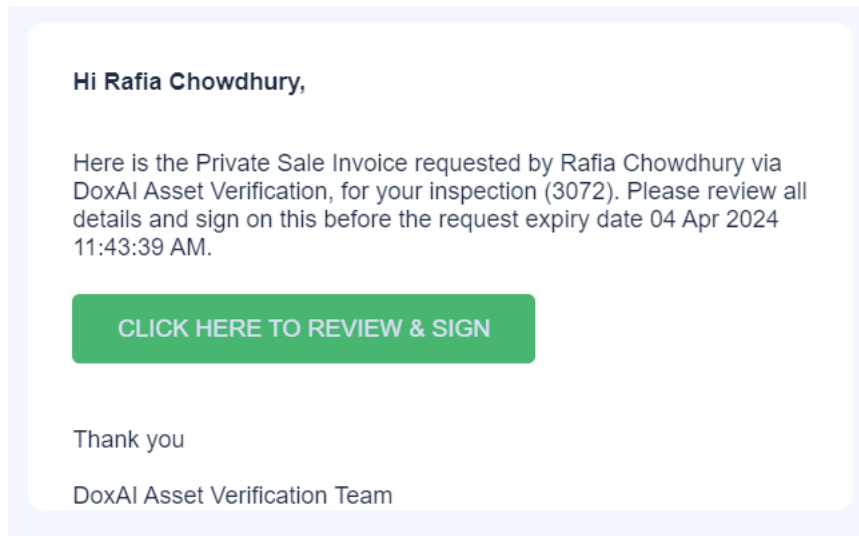
2. When you click "Initiate," the inspection status in your dashboard will update to "PSI: Requested."

**All Inspections**

Filter by asset | Filter by broker | Filter by Status

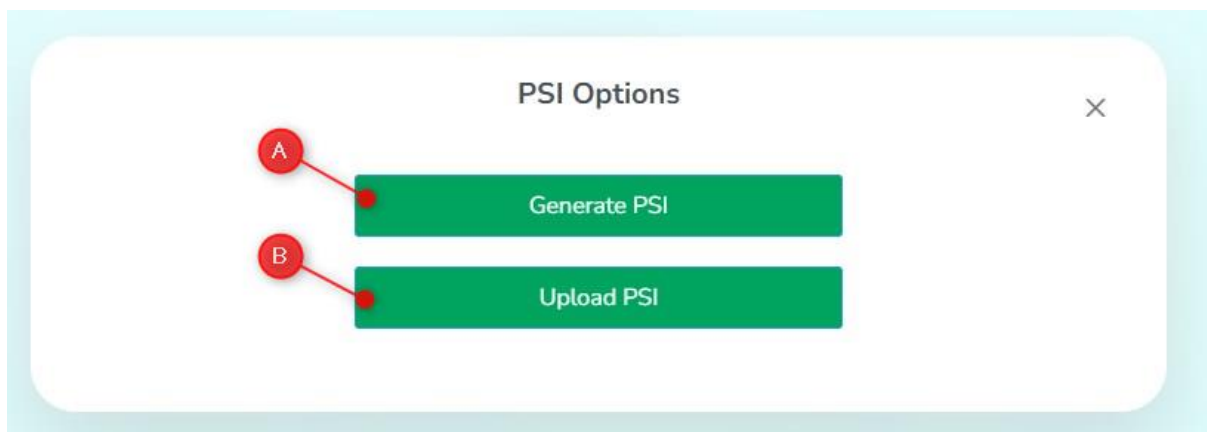
Inspection ID	Company Name	Initiator Name	Asset Type	Buyer Name	Seller Name	Last Modified Date	Status
2660	Verimoto PSI	Verimoto PSI Admin	Motor Vehicle		Rafia C	01/05/2023 - 13:41	Completed PSI: Requested

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

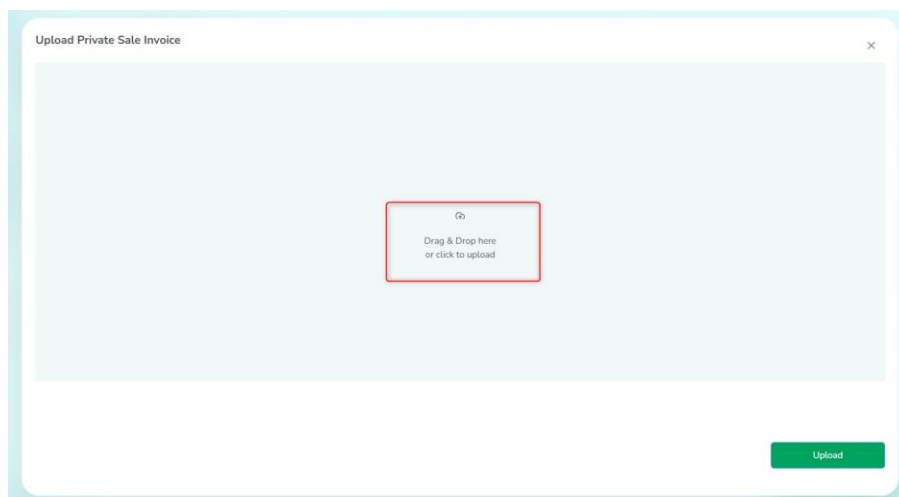


### Upload PSI process-

If you want to use your own template to get the e-sign, you can chose “**Upload PSI**”, from this popup-



1. You can drag & drop the PSI document or browse to select the file.



2. 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	

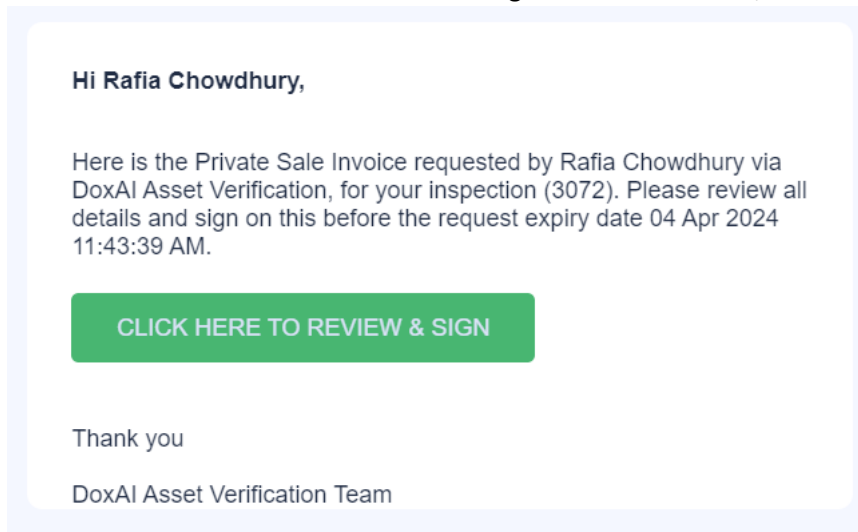
This receipt acknowledges the buyer's payment of (check one):

A deposit being made in the amount of 900000 Dollars

[Click here to replace](#)

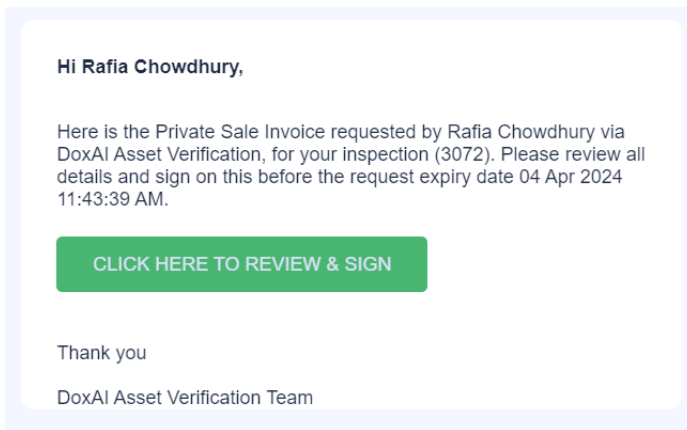
**Upload**

3. Once uploaded, drag and drop the signature field from the right menu to the desired location for the seller's digital signature, then click **"Save."** You can add any other required fields from the right menu and click **"Save."**
4. Seller will receive an email with a link to sign the PSI document, as shown in step 7 above.

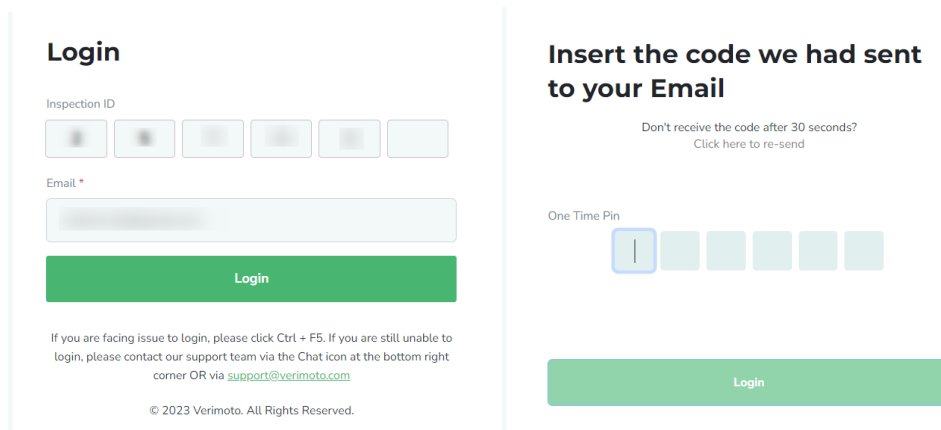


### What are the steps for seller/vendor for PSI request with signature?

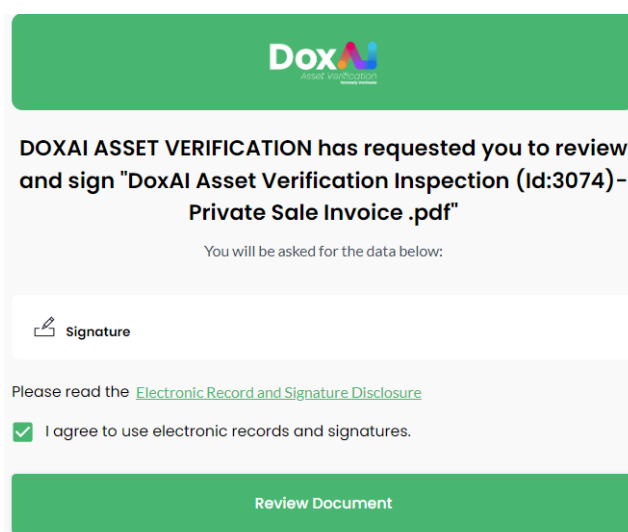
1. Once the PSI request is created, the seller of the asset will receive an email, as below, to sign the PSI document.



- By clicking "**CLICK HERE TO REVIEW & SIGN**," the seller will be redirected to the login screen. After clicking "**Login**," they will receive a 6-digit One Time Pin (OTP) via email.



- After entering the OTP, the seller will be redirected to a page to agree to use electronic records and signatures. They will tick the checkbox to agree and proceed by clicking the "**Review Document**" button.



- The seller can review all details and either agree and sign or decline if modifications are needed.



**Case 1:** If the seller agrees with all details, they will add/draw/upload their digital signature and submit the signed document.

The screenshot shows the 'Tax Invoice' form with various fields for seller and customer information, asset details, and authority to disburse funds. At the bottom, the 'Seller Signature' section has a red arrow pointing to the 'Add your signature' button. To the right, the 'Information requested' panel shows a signature field with a 'Change' button. At the bottom of the form, a green bar contains the text 'Information added 0/2 Please complete fields' and three buttons: 'Decline', 'Back', and 'Submit'.

**Case 2:** If the seller disagrees with some or all details, they can click "Decline" and provide the reason.

This screenshot is identical to the one above, showing the 'Tax Invoice' form and the 'Information requested' panel. However, a red arrow points to the 'Decline' button in the bottom green bar, indicating the action for a seller who disagrees with the details.

For PSI with e-signatures, the seller can reject each data point separately and mention the reason for rejection.

**Private Sale Invoice Sign Request**

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

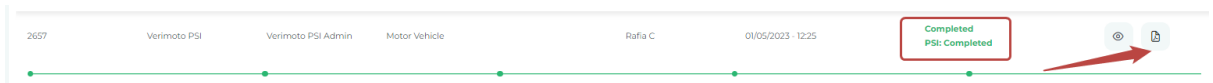
**Tax Invoice**

Vendor Name	Rafia Chowdhury	ABN	66796448095	Issue Date	12/02/2025
Address	4 Angl rd, Sydney 2000				
Contact Details	+61 452 566 256	rafia12.24@gmail.com			
<b>INVOICE TO (Purchaser's Details)</b>					
Customer Name	Rachna Dubey				
Address	49 king rd				
<b>DELIVERY TO</b>					
Customer Name	Rachna Dubey				
Address	49 king rd				
<b>ASSET DESCRIPTION</b>					
Year of Manufacture	No data recorded	Year/Month of compliance	2016-02		
Rego	CH68AT	Odometer	90878		
Make	FORD	VIN	6FPAAAJG5WGR97605		
Model	FALCON	Engine	JG5WGR97605		
Asset Description / Serial Number	6FPAAAJG5WGR97605	State	NSW	Variant Type	FORD G6
Cost Price (INC. GST)	\$ 44444	Less Deposit	\$ 9900	Total	\$ 35544
<b>AUTHORITY TO DISBURSE FUNDS</b>					
Account Name	Westpac Finance	BSB	899656		
Account Number	78766567	Amount	\$ 9000		
Account Name	Rafia Chowdhury	BSB	457754		
Account Number	5896536	Amount	\$ 26544		
<b>TERMS AND CONDITIONS</b>					
Your personal information is collected, used and disclosed only for the purpose of processing this private sale transaction, in accordance with DoxAI Australia Limited Privacy Policy. DoxAI Asset Verification is a product and business of DoxAI Australia. Read the DoxAI Privacy Policy which is available at <a href="https://doxai.co/privacy-policy">https://doxai.co/privacy-policy</a>					
Vendor Name	Rafia Chowdhury				

## 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

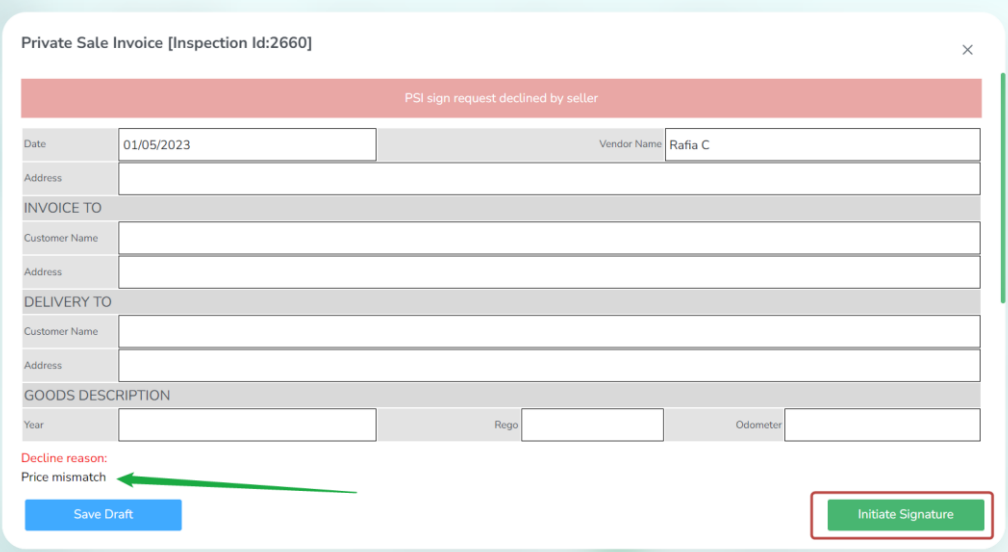
dashboard with **"PSI: Completed"**. Click on the "📄" icon to view & download the signed PSI document.



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.

Inspection ID	Seller Name	Buyer Name	Asset Type	Lender	Lender Ref.	Status
59943	[REDACTED]	simlief	Motor Vehicle	Banking/Robbie TEST	TEST	Completed PSI: Declined

- 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:

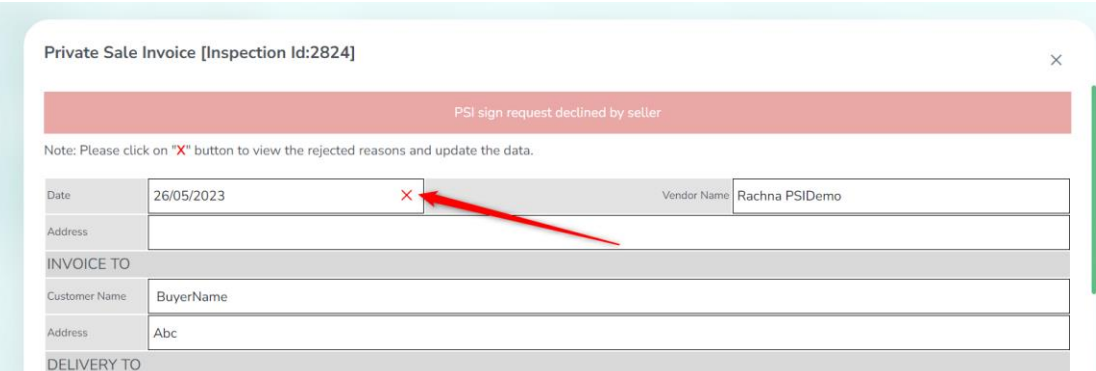
Decline reason:  
Price mismatch

Save Draft

Initiate Signature

- 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:

INVOICE TO

Customer Name: BuyerName

Address: Abc

DELIVERY TO

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

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

### 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.

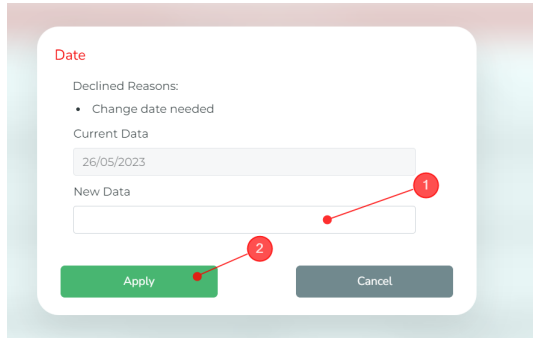
Inspection ID	Seller Name	Buyer Name	Asset Type	Lender	Lender Ref.	Status	
59943	...	...	Motor Vehicle	...	...	Completed PSI: Declined	

You can review and update the details based on declined reason and click on “**Initiate**” to re-initiate the process and send email to the seller/buyer 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.

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

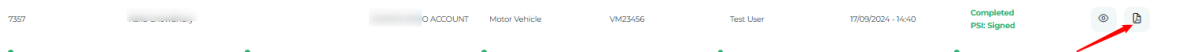


Once the data has been updated, click on “**Initiate**”, and Seller will receive new request to sign the document.

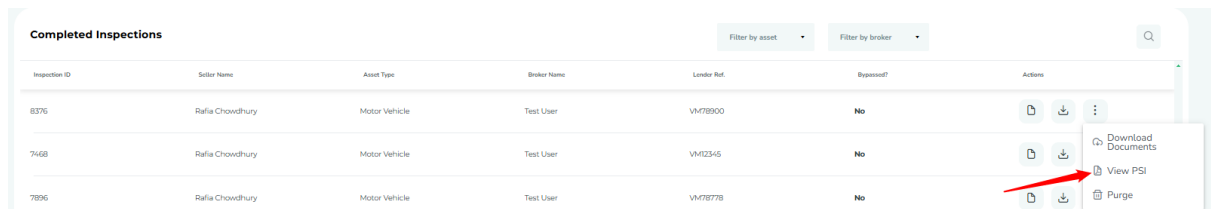
### How to view/download the signed/acknowledged PSI document?










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: Signed**”.

2. Click on the “” icon to view & download the signed PSI document.



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



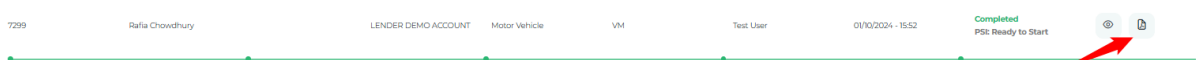
Inspection ID	Seller Name	Asset Type	Broker Name	Lender Ref	Disposed?	Actions
8376	Rafia Chowdhury	Motor Vehicle	Test User	VM23900	No	   <ul style="list-style-type: none"> <li>Download Documents</li> <li>View PSI</li> <li>Purge</li> </ul>
7468	Rafia Chowdhury	Motor Vehicle	Test User	VM2346	No	  
7896	Rafia Chowdhury	Motor Vehicle	Test User	VM78778	No	  

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

When **PSI with Receive Acknowledgement Only** is enabled for your lender company, users can either generate a system-automated PSI or UPLOAD a PDF copy of their PSI and send it to the seller for acknowledgement. This process follows the same flow as obtaining **E-sign + Acknowledgement**, but with one key difference: the seller will only provide acknowledgement of the document—no e-signature will be collected.

### Can I request both Buyer and Seller to e-sign the document?

Yes, when proceeding to generate the PSI, you can specify whether the buyer’s signature is required. If the buyer’s details were not provided during inspection creation, they can be added at this stage.



If buyer details are entered and the user toggles "Yes" for "Would you like to include the purchaser's signature in the Private Sale Invoice / Tax Invoice?", the buyer will receive a signature request via the provided email, along with the seller. The buyer can then choose to sign or decline the request, following the same process as the seller.

**Please confirm seller/buyer details** ×

This Private Sale Invoice / Tax Invoice request will go to below email.

Seller First Name*	Seller Last Name*	Seller Email*
Rafia	Chowdhury	[Redacted]
Buyer First Name	Buyer Last Name	Buyer Email
Rachna	Buyer	[Redacted]

Would you like to include the purchaser's signature in the Private Sale Invoice / Tax Invoice?

NOTE: Purchaser's signature is applicable only for the Acknowledgement + ESignature.

**Continue**

### Can I reopen a signed PSI and resend it?

Yes, you can reopen a PSI in **Requested** or **Signed** status, update the necessary details, and resend the signature request. However, this feature is not available for uploaded Private Sale Invoices. It will not incur additional fee.