

Creating a related transaction


1. All **Accounts** are displayed on the home screen as follows:
2. Click on the 'dropdown' icon after 'Select account'; and your account/s will be displayed as follows


Accounts


1234567 - Duty Transactions: TEST PTY LTD

7654321 - Payroll Tax: EXAMPLE PTY LTD


3. Click on your duty transactions account.
4. Click on **Duty transactions** from the menu as follows:

 Summary

 Manage users


 Manage user transactions


 Amend name


 Contact details

 Banking details

 Update Registration

 Financial Summary

 **Duty transactions**

 Search Duty transactions

5. The manage duty transactions screen will display as follows:

Manage duty transactions

New duty transaction ▾

Discarded Drafts

SRO No.	Client reference	Dealing No.	Type	Parties	Processor	Created date
	123456789	XXXXX	Property - Vesting of property - OPT	Fred Example to Mary Example	Nic	23/05/2017 11:10 AM

Drafts

SRO No.	Client reference	Dealing No.	Parties	Processor	Created date	Type	
			to	Nic	15/05/2017 2:35 PM	Other duty - Lease - OPT	Open
	Business 24	N23456	Bunnings to a a	Li	11/04/2017 9:00 AM	Business - Sale of business with lease - OPT	Open

Waiting for authorisation

SRO No.	Client reference	Dealing No.	Type	Parties	Processor	Status	Action date
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Submitted to SRO

SRO No.	Client reference	Dealing No.	Type	Parties	Processor	Status	Action date	
4951	LUETS		Other duty - Land use entitlement transfer	a a to f f	Nic	Awaiting SRO processing	14-Jun-2017	View/update Mail

6. Click on the **View/Update** link of the required transaction as follows.

Waiting for authorisation

SRO No.	Client reference	Dealing No.	Type	Parties	Processor	Status	Action date		
2004886	Very:Basic:Trust		Trust - Basic trust	The Very Basic Trust	LI	Pending authorisation	01-Sep-2017	View/update	Mail

7. Transaction details are displayed as follows:

[Review/Approve](#) [Create related transaction](#) [Cancel/withdraw transaction](#)

[Back to account](#)

Dealing information

Transaction category Trust transaction
Transaction type Basic trust
SRO transaction number 2004886
Client reference Very:Basic:Trust

Trust information

Declaration date 01-Jun-2017
Trust name The Very Basic Trust

8. Click on the **Create related transaction** button as follows:

[Create related transaction](#) [Cancel/withdraw transaction](#)

9. Complete all fields and click on the **Next** button until all screens are complete.

10. Once all fields are complete, click on one of the following buttons:

- Submit - Self endorse;
- Transferee Transaction certificate; or
- Save draft.