

Entering the 'other solicitor' details

When adding the details of the 'other solicitor' to a SalesDirect sale notice, *always* attempt to find that solicitor's details using the automated method first.

Entering the 'other solicitor' using automation

With the sale notice on screen and in add/update mode, click on the link 'Select a registered SalesDirect solicitor' at the bottom of the screen.

The 'User search' window will now open. Click on the region of the country the other solicitor operates from. A list of all companies that have registered with SalesDirect from that region of the country will now appear on screen.

Click on the name of the company that the other solicitor represents. A list of all SalesDirect registered solicitors from that company will now be displayed.

Click on the name of the other solicitor. The registered details of that solicitor will now automatically populate the 'other solicitor' fields in your sale notice.

Entering the 'other solicitor' manually

If the other solicitor has not yet registered with SalesDirect, enter their details in the fields provided.

Searching for proof of delivery

Viewing delivery details*

*only recorded for sales completed after 1st July 2008.

1. Search for your completed sale
2. Click in the 'Council advice' column
3. View recipient/sending information

The 'Sale notice notification' screen will display certain core details of the transaction plus the delivery details of that sale notice.

Registering for SalesDirect

It is necessary to register to use SalesDirect so that the system can be kept secure to validated users only. Simply complete the online registration form provided on the SalesDirect website.

As part of the registration process, you will be required to download a digital certificate.

More information

More detailed information is available from the full SalesDirect User Guide which can be downloaded from the SalesDirect website or alternatively, contact the Helpdesk at assistance@qv.co.nz on telephone 0800 639 686.



www.salesdirect.co.nz



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SalesDirect Mini Guide ▶▶▶

Entering a sale notice

Entering a sale notice using automation

Click the “Search for a property” link under the heading **Registered Users** and search for your property.

Once you select a property, your new sale notice will be displayed on screen. Now complete the remaining details.

1. Search for a property
2. Complete the remaining details
3. Choose whether to submit your sale as a ‘draft’, ‘pending’ or ‘completed’ sale.

Entering a sale notice manually

Click the “Create and submit a sales notice” link under the heading **Registered Users**.

A completely blank sale notice will be displayed to you on screen – complete the required details.

1. Open the manual sale notice form
2. Complete the required details
3. Choose whether to submit your sale as a ‘draft’, ‘pending’ or ‘completed’ sale

Updating a sale notice

1. Search for your sale and open it for editing
2. Complete the required changes
3. Choose whether to re-submit your sale as a ‘draft’, ‘pending’ or ‘completed’ sale

Whether creating, updating or deleting, SalesDirect automatically sends both you and the other solicitor an email with a revised PDF sale notice attached. This PDF file contains your updated information—*excludes draft sale notices*.

Deleting a sale notice

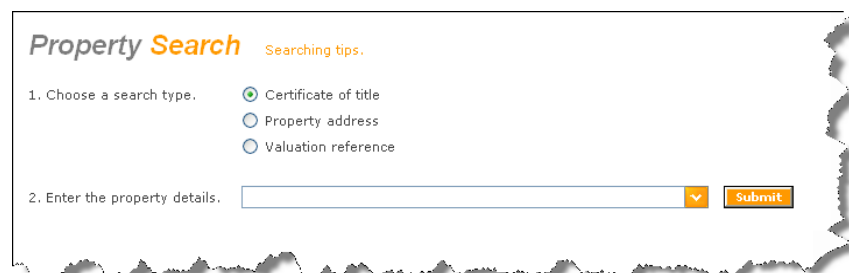
‘Completed’ sale notices that are more than 2 days older than the settlement confirmation date cannot be deleted.

1. Search for your sale and open it for editing
2. Scroll to the bottom of the sale notice
3. Click the **[Delete]** button
(enter a reason for the deletion if requested)

SalesDirect will **automatically delete** any pending or draft sale notice where the settlement date is more than two months old.

Searching for a property

Click the “Search for a property” link under the heading **Registered Users**.



1. Choose a search type by activating a radio button
2. Enter your property details
3. Select your property from the list, then **[Submit]**

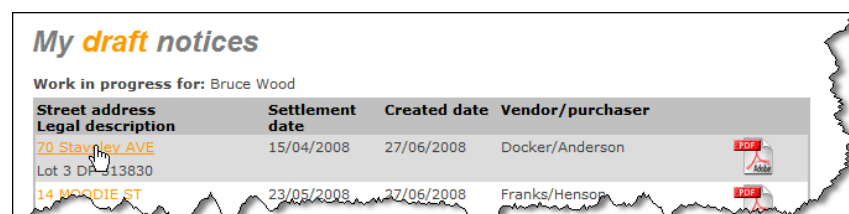
Matches: As you enter the details for Step 2, SalesDirect will begin listing records that match your property details - the more information you enter, the shorter the list of records will become. When your property details appear in the list, click on them to complete your search criteria and then click **[Submit]**.

Results: If there is only one property with those details, the ‘Sale Notice’ screen will now be displayed—populated with the details of your property.

If there is more than one property with the same details (e.g. a cross-lease property that shares the underlying land title with other units), a list of all matching properties will be displayed. Select your property from this list by clicking on the property address. The ‘Sale Notice’ screen will now be displayed—populated with the details of your property.

Searching for a sale

When searching for a sale, your search results will be displayed in a standard lineflow list similar to the sample below regardless of which search type is used. A summary for using the different search types is provided at right >>>



| Street address | Legal description | Settlement date | Created date | Vendor/purchaser |
|----------------|-------------------|-----------------|--------------|------------------|
| 70 Stavely AVE | Lot 3 DP 113830 | 15/04/2008 | 27/06/2008 | Docker/Anderson |
| 14 MOODIE ST | | 23/05/2008 | 27/06/2008 | Franks/Henson |

Edit: To open a sale notice for updating, click on the street address displayed in orange text. If the sale is ‘complete’ and the 2 day editing period has lapsed, the address text will change from orange to grey, indicating it has been locked and can no longer be updated.

PDF: To view the current PDF copy of the draft sale, click on the Adobe PDF icon at the far right of that sale record.

Searching for a draft sale notice

Searching for your draft sales

To find one of your ‘draft’ sale notices, click on the link ‘My draft notices’ under the menu heading **Registered Users**.

Searching for all draft sales in your office

To find a ‘draft’ sale notice submitted by anyone in your office, click on the link ‘My office draft notices’ under the menu heading **Registered Users**.

Searching for a pending sale notice

Searching for your pending sales

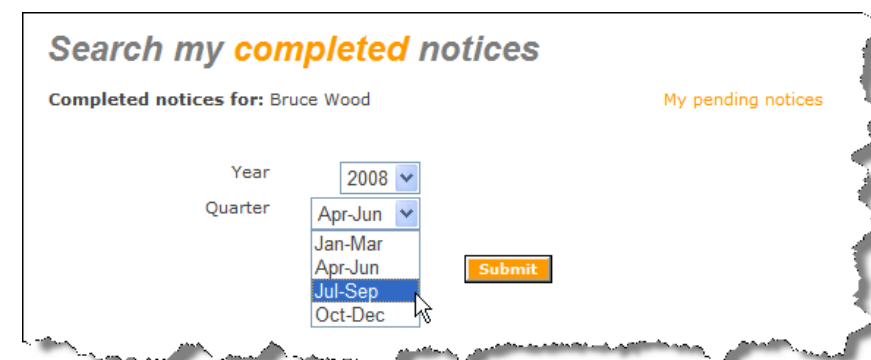
To find one of your ‘pending’ sale notices, click on the link ‘My sales notices’ under the menu heading **Registered Users**.

Searching for all pending sales in your office

To find a ‘pending’ sale notice submitted by anyone in your office, click on the link ‘My offices notices’ under the menu heading **Registered Users**.

Searching for a completed sale notice

Searching for your completed sales



To find one of your ‘completed’ sale notices, click on the ‘My sales notices’ link under the menu heading **Registered Users** and then click ‘My completed notices’ (upper right) on the ‘My pending notices’ screen.

Select the quarter when your sale was settled and then click **[Submit]**.

Searching for all completed sales in your office

To find a ‘completed’ sale notice submitted by anyone in your office, click on the link ‘My offices notices’ under the **Registered Users** menu heading and then click on the ‘My office completed notices’ link (upper right) on the ‘My office pending notices’ screen.

The remaining steps are the same as searching for your completed sales.