



LexisNexis®

Lexis® Convey Certified Transfers Course

This self-paced online course gives you a solid foundation of the Lexis Convey Transfers Module. As you work through the weekly modules, you will gain a working understanding of the property transfer process within Lexis Convey, which will include learning how to use the SARS and Lexis RatesClearance integrations with Lexis Convey, to your advantage.

On successfully completing the course, you will be awarded an Online Lexis Convey Transfers Certification attesting your achievement.

Course Summary

Course Details

Duration: 6 weeks

Course Format: Self-paced interactive tutorials and video

Contact email: elarning@lexisnexis.co.za

Certification

To qualify for your official Certificate, you are required to complete all course modules and score 70% or more in each of the course assessments. On successful completion, a print-ready version of your Certificate will be made available online or can be posted if you prefer.

Course Contents

Module 1: Opening a Transfer File

Module 2: Transfer Details

Unit 1: Transfer Details

Unit 2: Correspondence, Parties & Properties

Module 3: Financial and Accounts

Unit 1: Financial Menu

Unit 2: Accounts Menu

Module 4: SARS Integration

Module 5: Lexis RatesClearance



Module 1 Opening a Transfer File

In Module 1 you will learn about the different ways to create a new Transfer matter in Lexis Convey.

After working through Module 1 you will be able to:

- Distinguish between manual and electronic Transfer instructions
- Create a new manual Transfer
- Accept and open a new Electronic Transfer Instruction (ETI)
- Validate the property
- Perform a Deeds Office search and import the results

Module 2 Transfer Details Unit 1

After working through Unit 1 you will be able to:

- Capture short property and party details
- Capture sale details and understand the effect this has on the Financial and Accounts menus
- Complete information for an electronic investment and select an affiliated institution
- Action the relevant milestones

Module 2 Correspondence, Parties & Properties Unit 2

The contact information of the Transferor(s), Transferee(s) and related stakeholders are captured under the Correspondence menu.

After working through Unit 2 you will be able to:

- Capture contact information for the parties, Bond and/or Bond Cancellation Attorney and Listing and/or Estate Agents
- Select the applicable clearance agents
- Initiate an electronic cancellation and guarantee request
- Create a new Transferor
- Edit existing Transferor / Transferee details
- Import Transferee's details from an existing matter
- Work with the property information on a Transfer

Module 3 Unit 1

Financial Menu

The Financial menu records all the monetary entries in the transaction, including purchase price, deposit, bond proceeds, SARS duties and related fees and disbursements and is used to create the accounts that will be handed to the Transferor and Transferee.

After working through Unit 1 of Module 3 you will be able to:

- Complete general financial information relating to the Transfer
- Apply VAT to a transaction
- Capture dutiable options, tariff fee, transfer duty and clearance certificate fees, etc.

Module 3 Unit 2

Accounts Menu

The Accounts menu is where all the data captured on the Financial menu gets allocated to the respective accounts of the Seller and Purchaser.

After working through Unit 2 of Module 3 you will:

- Understand how the amounts and data captured on the Financial and Transfer Details menus are used to systematically build the Proforma and Final accounts for the Transferee and Transferor.
- Know how to work with all accounts including the Proforma, Final and Firm accounts.

Module 4

SARS Menu

This module assumes that your firm has already been activated for SARS.

After working through Module 4 you will:

- Be able to capture the information required to apply for your SARS TD receipt, within Lexis Convey
- Know where to submit the TD request to SARS
- Identify which functions become available once the request has been submitted (i.e. querying a TD status, amending / cancelling a submitted TD request)
- Know how to indicate that a transaction is vatable and where to assign the applicable exemption reasons
- Know where to go to submit supporting documents to SARS, should these be requested

Module 5 Applying for Rates Clearance

With Lexis Convey you can apply for rates clearance figures and certificates electronically from within your Transfer matters. The web platform used for this purpose is Lexis RatesClearance.

Module 5 aims to prepare you to perform the tasks associated with the rates clearance application process and demonstrates how to:

- Create new rates request
- Complete the required tabs and mandatory fields
- Edit Sellers/Credents, Buyers/Cessionaries and Property information
- Complete Refund information
- Submit the request
- Download the RCC



Step 1 Log In

Visit the Online Training website through the direct support link from within Lexis Convey.

Step 2 Register

In the Lexis Convey section, simply click on the Certified Transfers course. You will be given the option to enrol, which is all you need to do. At that point you are registered for the course. It's important to note that you will have 6 weeks from the moment you enrol to complete the course.

Step 3 Your Customer Login

As the registrations are done automatically, you will need to ensure that you access the course using the same Lexis Convey credentials every time, otherwise you will lose the progress you've made.

Step 4 Start Learning

You can start whenever you're ready to begin your learning journey. Each module will require that you pass the assessment with 70% in order to unlock and continue to the next. You will only have 2 attempts for each assessment, so please ensure you're ready when you begin each of them.

Step 5 Get Certified

After completing all modules and passing the assessments with the required 70%, you will be given an official certificate online. This is available for you to download for your records.

Certified Transfers Course

Register now at <http://training.lexisnexis.co.za/>

✉ elarning@lexisnexis.co.za