

GhostConvey

Version 16

May 11, 2017

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Purpose

The purpose of this guide is to illustrate the changes to GhostConvey contained in the version 16 release. These notes supplement the existing training offered at our branches and the material available on the Online Training website.

Scope of the Changes

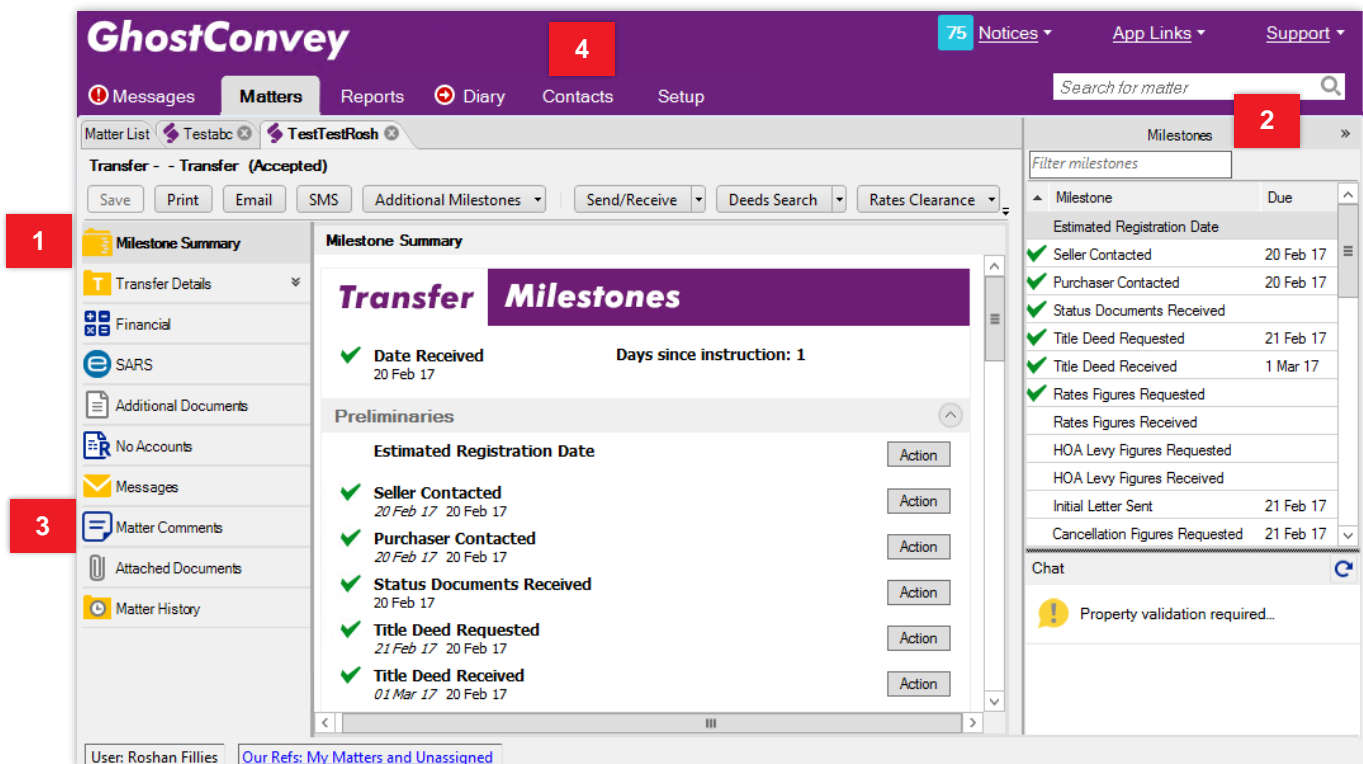
The following new features and/or adjustments are included in the GhostConvey version 16 release:

- Milestone Changes
 - Milestone Summary menu for all matter types
 - Milestone panel
 - Additional (user configured) milestones
- Global Contacts tab
- Matter Comments menu
- Classic Setup migration to .Net
- Workflow customisation
 - Milestone Process Configuration in Setup

Visual Changes

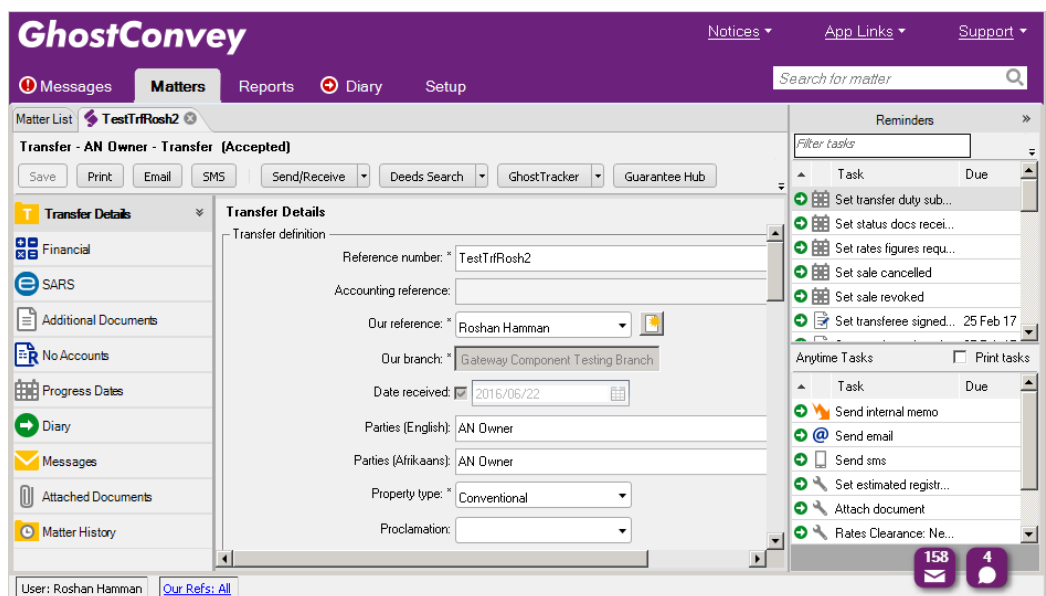
Areas where visible changes have been made to the main matter screen:

1. New **Milestone Summary** menu for all matter types
2. *Reminders* and *Anytime tasks* panel has been replaced with a **Milestones** panel which works hand-in-hand with the **Milestone Summary** menu.
3. New **Matter Comments** menu
4. New global **Contacts** tab



Changes 1 and 2 will only be visible on matters created in GhostConvey version 16.

Existing matters remain unimpacted.

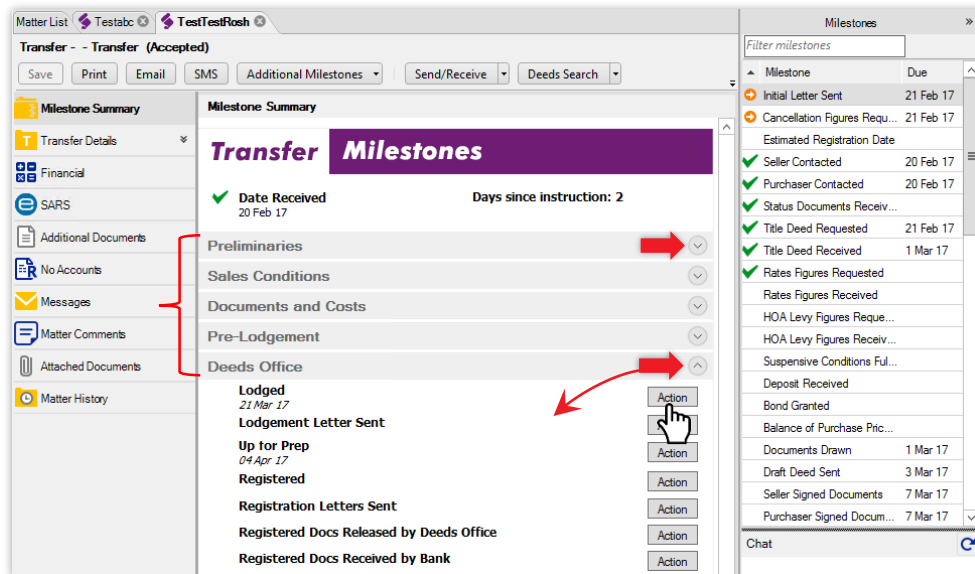


GhostConvey V16 view of a matter created in GhostConvey V15

Milestone Summary Menu

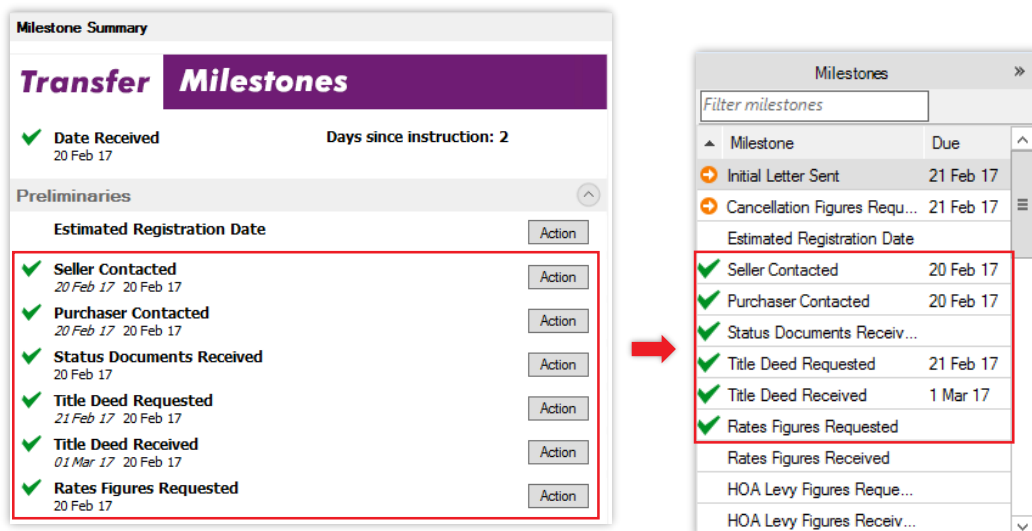
All new matters created in version 16, regardless of matter *type* will have a **Milestone Summary** menu. The **Milestone Summary** menu and **Milestones** panel work hand-in-hand and replace the *Matter Diary* and *Progress Dates* menus.

- The **Milestone Summary** groups are modelled on the basic workflow of a matter from date of instruction until date of registration. These groups can be *expanded* or *collapsed* as needed by clicking on the drop-down arrows at the end of each group heading. The milestones relevant to each group are thus revealed.
- Milestones are processed or completed by clicking on the **Action** buttons.



The screenshot shows the 'Milestone Summary' panel on the left and the 'Milestones' panel on the right. The 'Milestone Summary' panel has a sidebar with navigation options: Milestone Summary, Transfer Details, Financial, SARS, Additional Documents, No Accounts, Messages, Matter Comments, Attached Documents, and Matter History. The main area of the 'Milestone Summary' panel is titled 'Transfer Milestones' and shows a 'Date Received' of 20 Feb 17 with 'Days since instruction: 2'. It lists several milestone groups: Preliminaries, Sales Conditions, Documents and Costs, Pre-Lodgement, and Deeds Office. Each group has a drop-down arrow. The 'Deeds Office' group is expanded, showing a list of milestones with 'Action' buttons next to them. A red arrow points to the 'Action' button for 'Registered Docs Released by Deeds Office'. The 'Milestones' panel on the right is a table with columns 'Milestone' and 'Due'. It lists various milestones with their due dates, some with green checkmarks indicating they have been actioned. A red arrow points from the 'Action' button in the 'Milestone Summary' panel to the 'Milestones' panel.

- Once a milestone is actioned the **Milestone** panel is automatically updated.
 - A green tick next to a milestone indicates that it has been actioned.
 - The date in the **Due** column refers to the date on which the milestone was actioned.

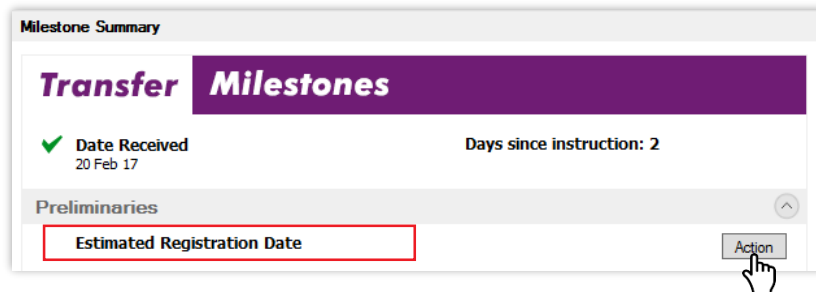


This block shows two side-by-side screenshots of the 'Milestone Summary' and 'Milestones' panels, illustrating the state after a milestone is actioned. The left screenshot shows the 'Milestone Summary' panel with the 'Deeds Office' group expanded. The right screenshot shows the 'Milestones' panel with the same milestones listed. A red box highlights the milestones that have been actioned, showing a green checkmark and the date they were actioned. A red arrow points from the 'Milestone Summary' panel to the 'Milestones' panel, indicating the update.

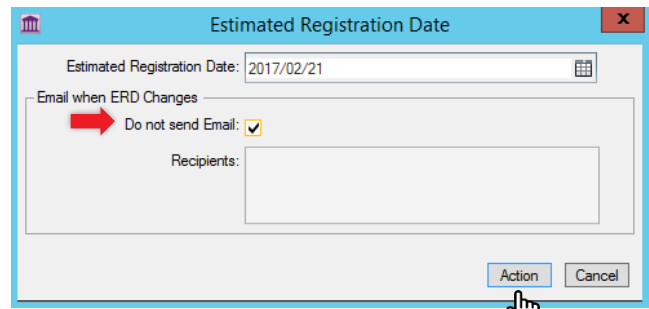
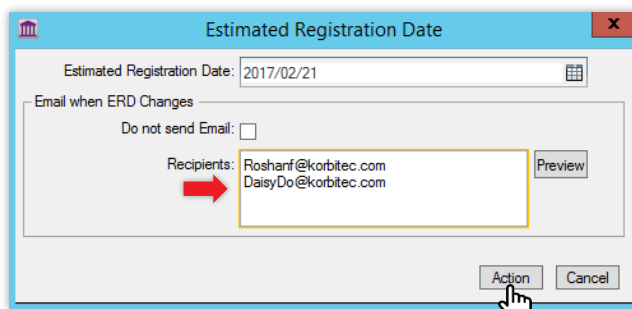
Milestone	Due
Initial Letter Sent	21 Feb 17
Cancellation Figures Requ...	21 Feb 17
Estimated Registration Date	
Seller Contacted	20 Feb 17
Purchaser Contacted	20 Feb 17
Status Documents Receiv...	
Title Deed Requested	21 Feb 17
Title Deed Received	1 Mar 17
Rates Figures Requested	
Rates Figures Received	
HOA Levy Figures Reque...	
HOA Levy Figures Receiv...	

Actioning Milestones

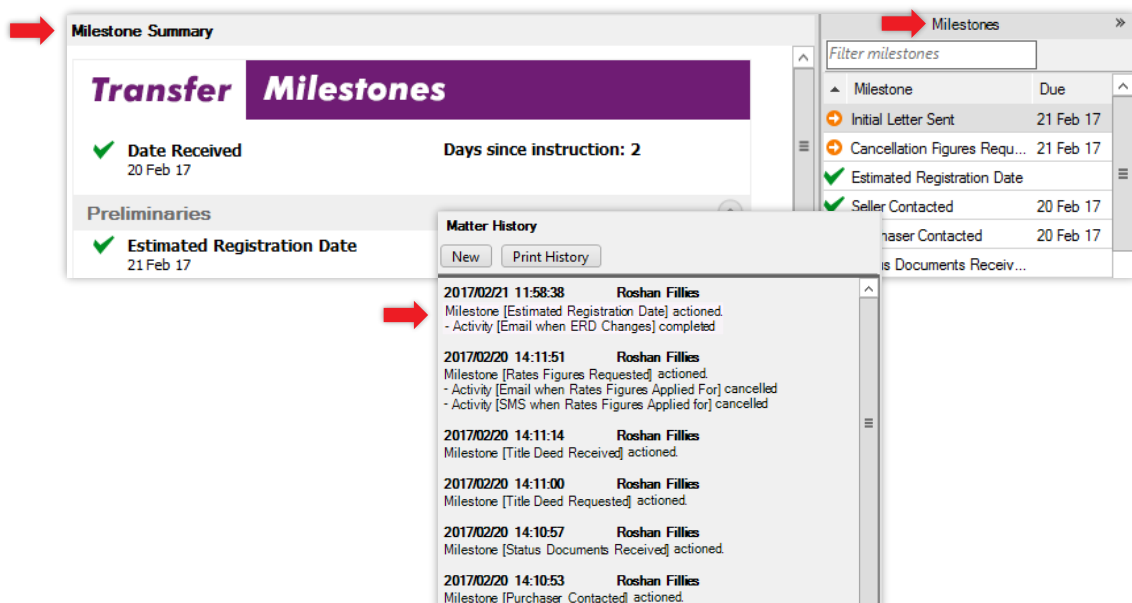
- On the **Milestone Summary** menu, select the milestone, for example, *Estimated Registration Date*, and click **Action**.



- When actioning a milestone, the dialog box will display the action date, **Recipients** field (select or capture recipients for email or SMS messages) and a reason field, if applicable. Any user-configured activities associated with the milestone such as notifications, will also be triggered.
 - You can choose to send or not send emails and SMSs. To send the email/SMS, add the recipients and click **Action** or, select the **Do not send Email/SMS** checkbox and then click **Action**.



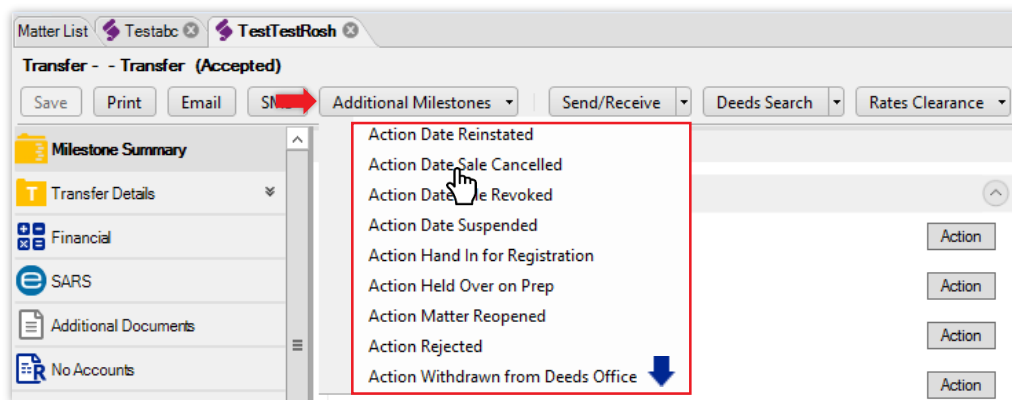
- The **Milestone Summary**, **Milestones** panel and **Matter History** will be updated simultaneously.



Additional Milestones

Milestones that do not form part of the core workflow, can be actioned from the **Additional Milestones** drop-down list. These milestones can also be *inserted* into the **Milestone Summary** menu, provided they have been set up to do so. The **Milestone Process Configuration** menu in **Setup** is discussed on page 30.

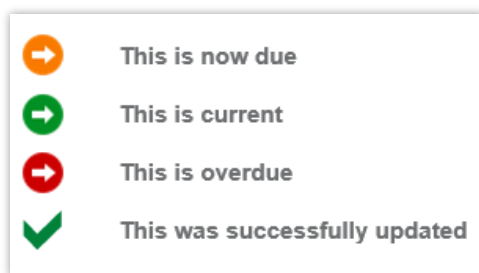
- Additional milestones are actioned by selecting them from the drop-down list and completing any details you are prompted for.
- A blue arrow [↓] indicates that the additional milestone may be inserted into the main workflow.



Milestones Panel

The **Milestones** panel replaces the **Reminders** and **Tasks** panel. All the milestones for the matter are listed here and, if applicable, a due date will be displayed.

- The icons next to each milestone indicates its current state in the workflow.

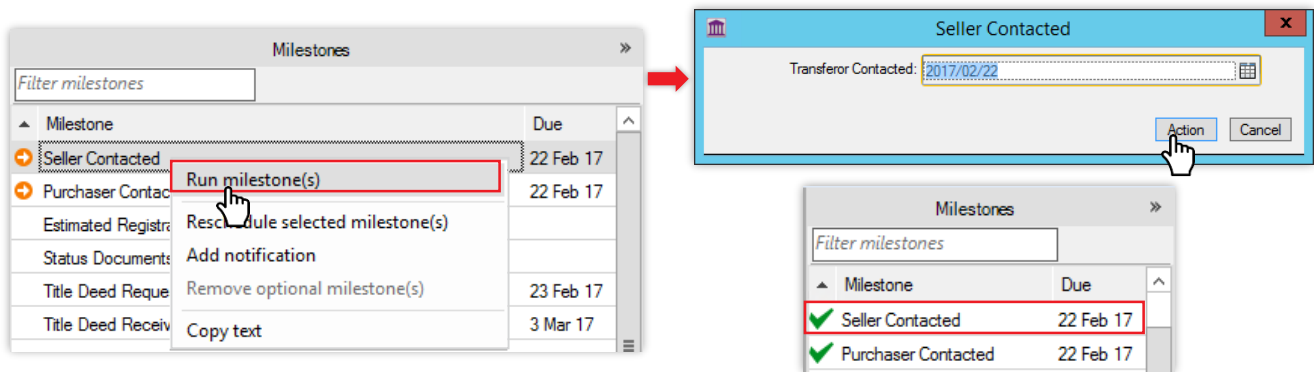


Milestones	
Filter milestones	
Milestone	Due
Initial Letter Sent	21 Feb 17
Cancellation Figures Requested	21 Feb 17
Pay Rates o/s	21 Feb 17
Estimated Registration Date	
Seller Contacted	20 Feb 17
Purchaser Contacted	20 Feb 17
Status Documents Received	
Title Deed Requested	21 Feb 17
Title Deed Received	1 Mar 17
Rates Figures Requested	
Rates Figures Received	
HOA Levy Figures Requested	
HOA Levy Figures Received	
Suspensive Conditions Fulfilled	
Deposit Received	
Bond Granted	
Balance of Purchase Price Received	
Documents Drawn	1 Mar 17
Draft Deed Sent	3 Mar 17
Seller Signed Documents	7 Mar 17
Purchaser Signed Documents	7 Mar 17
Pro forma Costs Received	14 Mar 17
Transfer Duty Submitted	

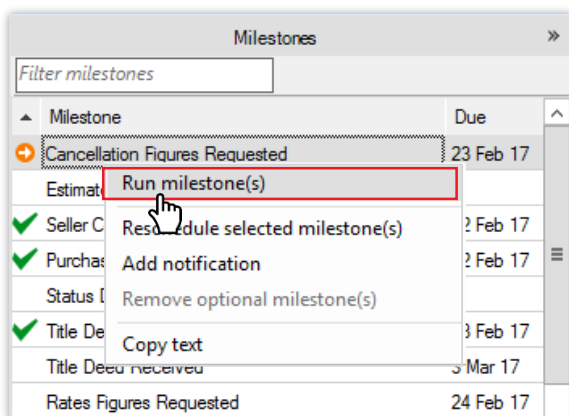
Running a Milestone

All the milestones that appear on the **Milestone Summary** menu, are displayed on the Milestones panel. Any other milestones must be actioned from the **Additional Milestones** drop-down. Milestones are displayed according to their workflow order.

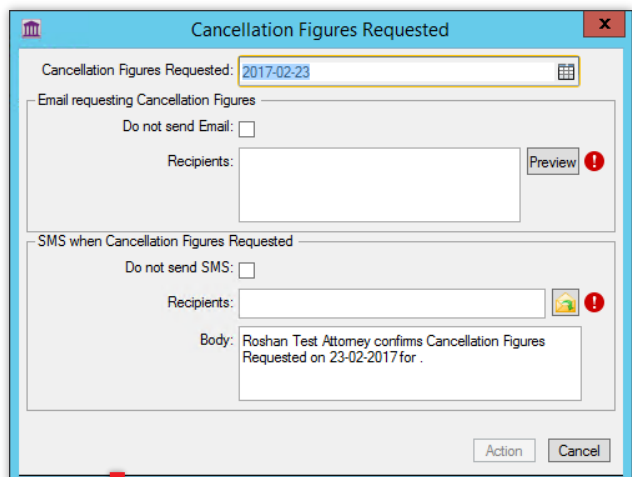
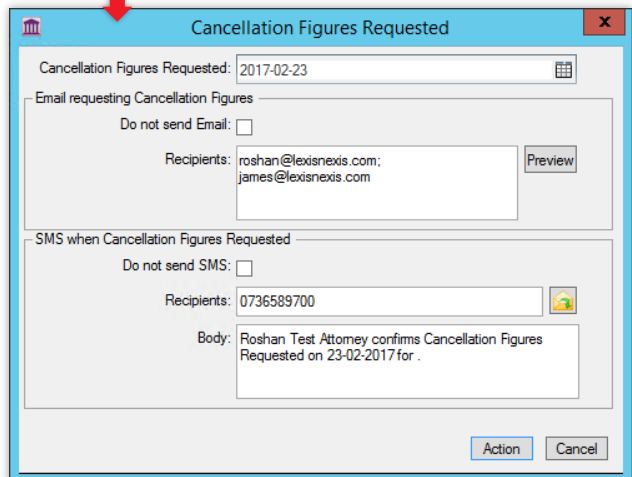
1. Milestones can be updated by double-clicking or right-clicking and selecting *Run Milestone(s)*.



Note: Some milestones have triggered actions that will occur at the same time the milestone is actioned, such as Email or SMS messages you can send to the relevant stakeholders.

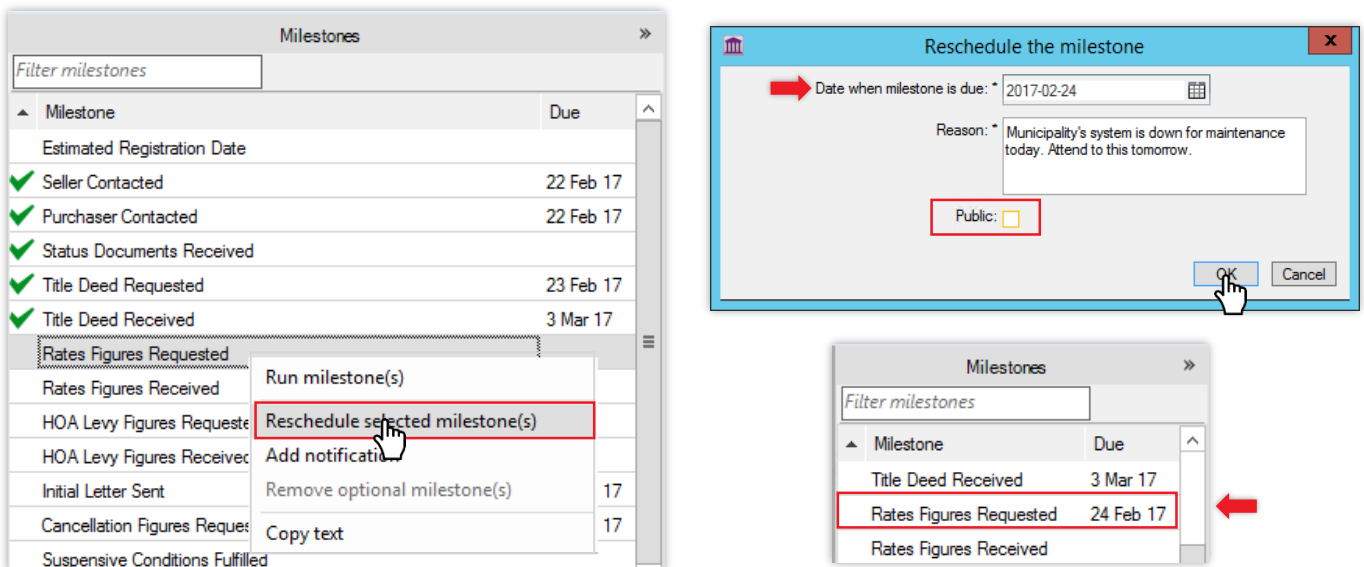


- The **Recipients** requirement remains mandatory until the **Do not send Email / SMS** checkboxes are selected. The warning icons [!] are reminders that you need to enter at least one email address to send an email and one cell phone number to send an SMS.
- Clicking the **Action** button will update the milestone and send the notifications.

Rescheduling a Milestone

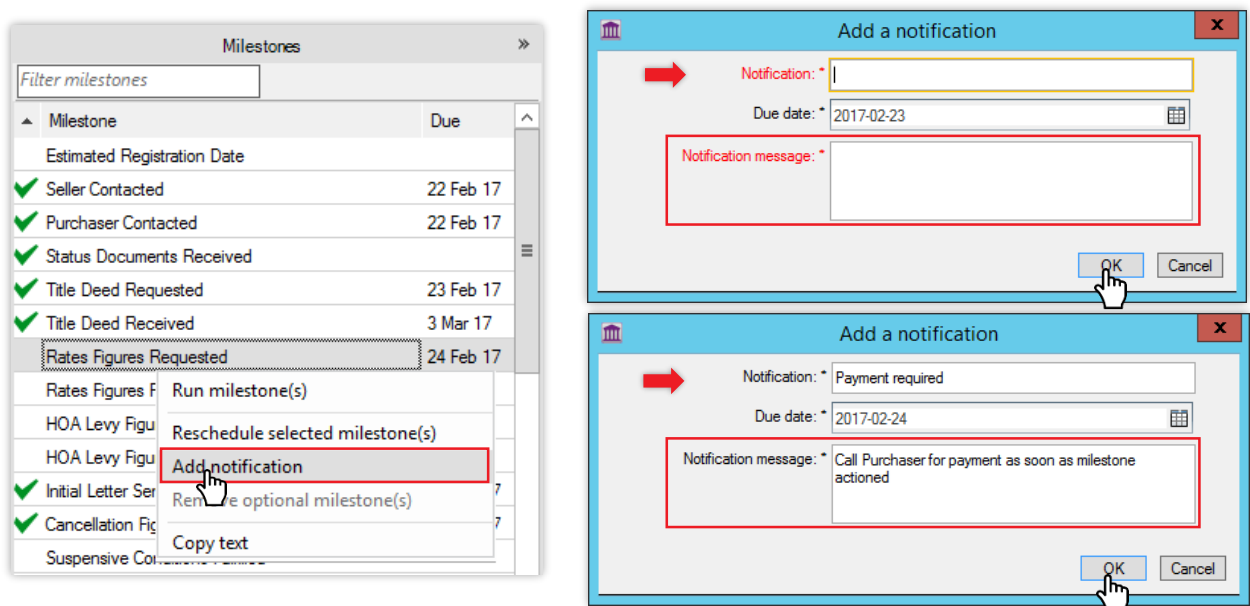
2. Milestones can be **rescheduled**, if necessary and you will be prompted to provide a due date and a reason for rescheduling. The due date on the Milestones panel is updated automatically as soon as you have completed the rescheduling activity.
 - You also have the option of sharing this information by selecting the **Public** checkbox. If the checkbox is selected, the **Reason** comment will be shared on GhostTracker and will appear in the reports generated in GhostConvey.



The first screenshot shows the 'Milestones' panel with a list of milestones. The 'Rates Figures Requested' milestone is selected, and a context menu is open with the option 'Reschedule selected milestone(s)' highlighted. The second screenshot shows the 'Reschedule the milestone' dialog box. It contains a date field set to 2017-02-24, a reason field with the text 'Municipality's system is down for maintenance today. Attend to this tomorrow.', and a 'Public' checkbox which is checked. The third screenshot shows the 'Milestones' panel again, with the 'Rates Figures Requested' milestone now showing a due date of 24 Feb 17.

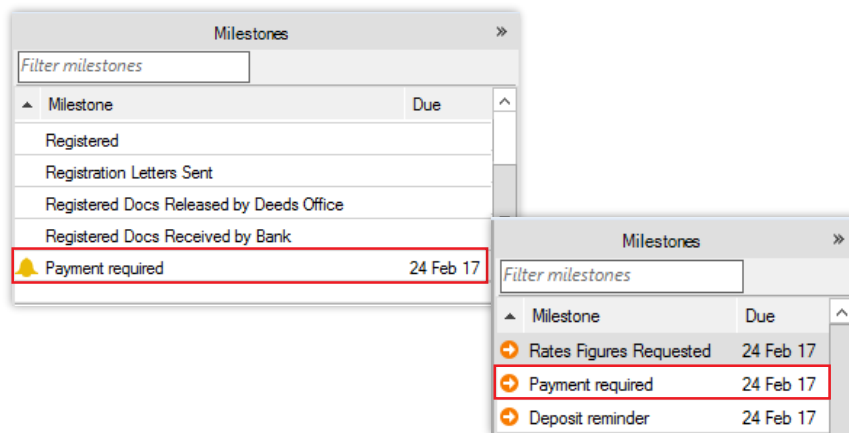
Adding a Notification

3. A **Notification** can be added to a milestone. The notification will pop up on the scheduled **due date**.



The first screenshot shows the 'Milestones' panel with the 'Rates Figures Requested' milestone selected. A context menu is open, and the 'Add notification' option is highlighted. The second screenshot shows the 'Add a notification' dialog box. It contains a 'Notification' field with the text 'Payment required', a 'Due date' field set to 2017-02-24, and a 'Notification message' field with the text 'Call Purchaser for payment as soon as milestone actioned'.

Note: Notifications act as reminders and are added at the bottom of the **Milestones** list when created. They are moved to the top of the list on the scheduled due date:



Milestone	Due
Registered	
Registration Letters Sent	
Registered Docs Released by Deeds Office	
Registered Docs Received by Bank	
Payment required	24 Feb 17

Milestone	Due
Rates Figures Requested	24 Feb 17
Payment required	24 Feb 17
Deposit reminder	24 Feb 17

Matter Comments

The **Matter Comments** menu allows you to post remarks to your matter and also decide which remarks are for your attention only, such as file notes and which remarks you wish to share (by selecting the **Public** checkbox).

Note:

- Comments are added to the **Matter History** regardless of whether they are shared
- The reasons given for *rescheduled* milestones are displayed in the **Matter Comments**.

Milestone Summary

Transfer Details

Financial

SARS

Additional Documents

No Accounts

Messages

Matter Comments

Attached Document

Matter History

New

Public	Comment	Date Added	User	Milestone
	<div>filter text</div>	<div>filter text</div>	<div>filter text</div>	<div>filter text</div>
<input type="checkbox"/>	This is just for my records	2017-02-23 13:57:55	Roshan Fillies	
<input checked="" type="checkbox"/>	I am having difficulty with the TD payment - I may need to ...	2017-02-23 13:56:55	Roshan Fillies	
<input type="checkbox"/>	This is me typing yet another fantastic comment but I only ...	2017-02-23 13:56:18	Roshan Fillies	
<input checked="" type="checkbox"/>	i am typing another comment	2017-02-23 13:56:01	Roshan Fillies	
<input type="checkbox"/>	Milestone Rates Figures Requested rescheduled to 24 Feb...	2017-02-23 10:07:20	Roshan Fillies	Rates Figures Requested

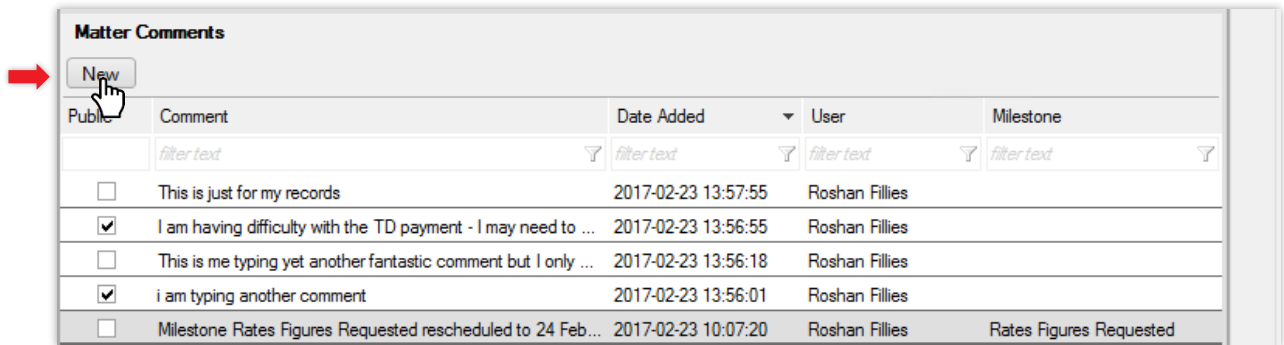
The checkboxes in the **Public** column indicate which comments

Milestones

The checkboxes in the **Public** column indicate which comments are shared and which are not. A tick next to a comment indicates that the comment is shared.

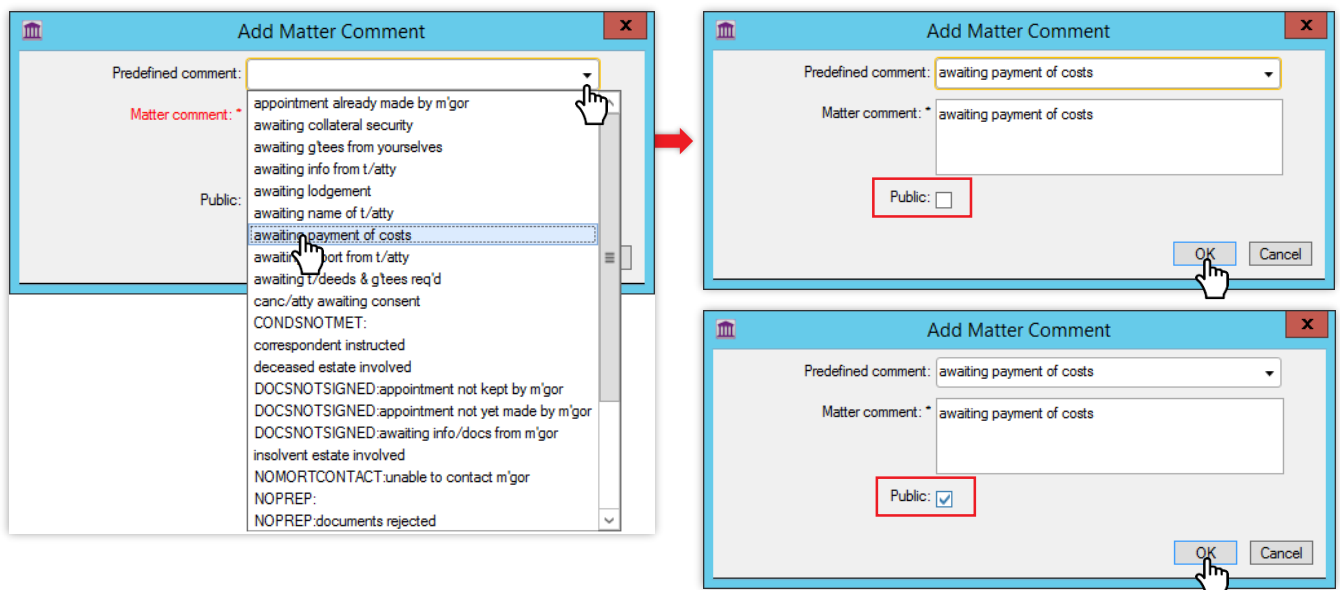
Creating Matter Comments

- Under **Matter Comments** click the **New** button.



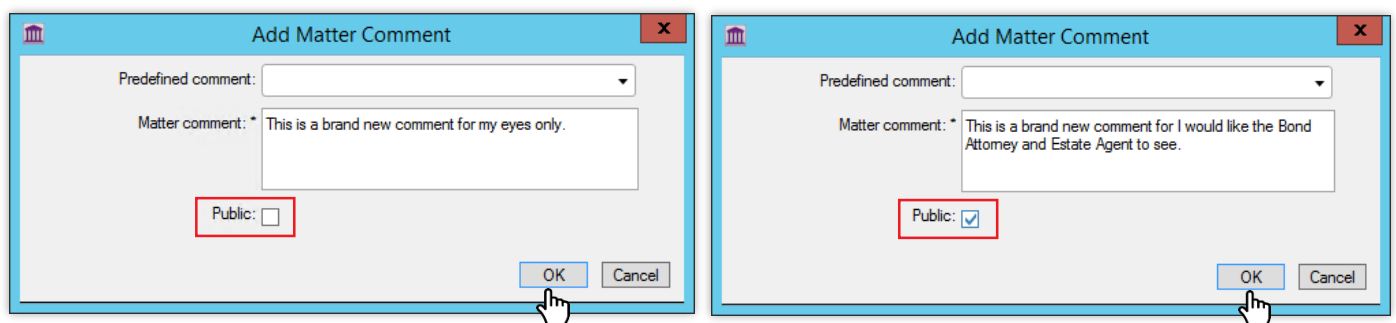
Matter Comments					
Public	Comment	Date Added	User	Milestone	
	<i>filter text</i>	<i>filter text</i>	<i>filter text</i>	<i>filter text</i>	<i>filter text</i>
<input type="checkbox"/>	This is just for my records	2017-02-23 13:57:55	Roshan Fillies		
<input checked="" type="checkbox"/>	I am having difficulty with the TD payment - I may need to ...	2017-02-23 13:56:55	Roshan Fillies		
<input type="checkbox"/>	This is me typing yet another fantastic comment but I only ...	2017-02-23 13:56:18	Roshan Fillies		
<input checked="" type="checkbox"/>	i am typing another comment	2017-02-23 13:56:01	Roshan Fillies		
<input type="checkbox"/>	Milestone Rates Figures Requested rescheduled to 24 Feb...	2017-02-23 10:07:20	Roshan Fillies	Rates Figures Requested	

- Select a **Predefined comment** from the drop-down list or type an ad hoc comment in the **Matter comment** block. Select the **Public** checkbox, if applicable and click OK.
 - To add a predefined comment, click the drop-down list, select the comment, select/deselect the **Public** checkbox on the **Add Matter Comment** dialog box and click OK.



The first screenshot shows the 'Add Matter Comment' dialog box with the 'Predefined comment' dropdown menu open. The 'Matter comment' field contains 'awaiting payment of costs'. The 'Public' checkbox is unchecked. The second screenshot shows the same dialog box with the 'Public' checkbox checked.

- To add an ad hoc comment, simply type your comment in the **Matter comment** block, select/deselect the **Public** checkbox and click OK.




The first screenshot shows the 'Add Matter Comment' dialog box with an ad hoc comment 'This is a brand new comment for my eyes only.' in the 'Matter comment' field. The 'Public' checkbox is unchecked. The second screenshot shows the same dialog box with the 'Public' checkbox checked.

Viewing Matter Comments

1. All the comments raised on a matter are displayed in the **Matter Comments** list. The following details are displayed:
 - 1.1 **Public** indicator. If the checkbox in this column is selected it means that the comment is shared on GhostTracker.
 - 1.2 **Comment** preview. Usually only the first line of a comment is displayed. Double click on a comment in the list to view the full details.
 - 1.3 **Date added** refers to the date and time the comment was added.
 - 1.4 **User** refers to the GhostConvey user who added the comment.
 - 1.5 If the comment was raised from a milestone the relevant milestone will be listed here.

Matter Comments				
New				
1.1	1.2	1.3	1.4	1.5
Public	Comment	Date Added	User	Milestone
	<i>filter text</i>	<i>filter text</i>	<i>filter text</i>	<i>filter text</i>
<input checked="" type="checkbox"/>	Milestone Bond Granted rescheduled to 27 Feb 17. Reason: As per a...	2017-02-23 15:36:38	Roshan Fillies	Bond Granted
<input checked="" type="checkbox"/>	This is a brand new comment for I would like the Bond Attorney and E...	2017-02-23 14:41:50	Roshan Fillies	
<input type="checkbox"/>	This is just for my records	2017-02-23 13:57:55	Roshan Fillies	
<input checked="" type="checkbox"/>	I am having difficulty with the TD payment - I may need to have the C...	2017-02-23 13:56:55	Roshan Fillies	
<input type="checkbox"/>	This is me typing yet another fantastic comment but I only want this to ...	2017-02-23 13:56:18	Roshan Fillies	
<input checked="" type="checkbox"/>	i am typing another comment	2017-02-23 13:56:01	Roshan Fillies	
<input type="checkbox"/>	Milestone Rates Figures Requested rescheduled to 24 Feb 17. Reaso...	2017-02-23 10:07:20	Roshan Fillies	Rates Figures Requested



Matter Comment

Matter comment: * Milestone Rates Figures Requested rescheduled to 24 Feb 17. Reason: Municipality's system is down for maintenance today. Attend to this tomorrow.

Public: ☐

OK

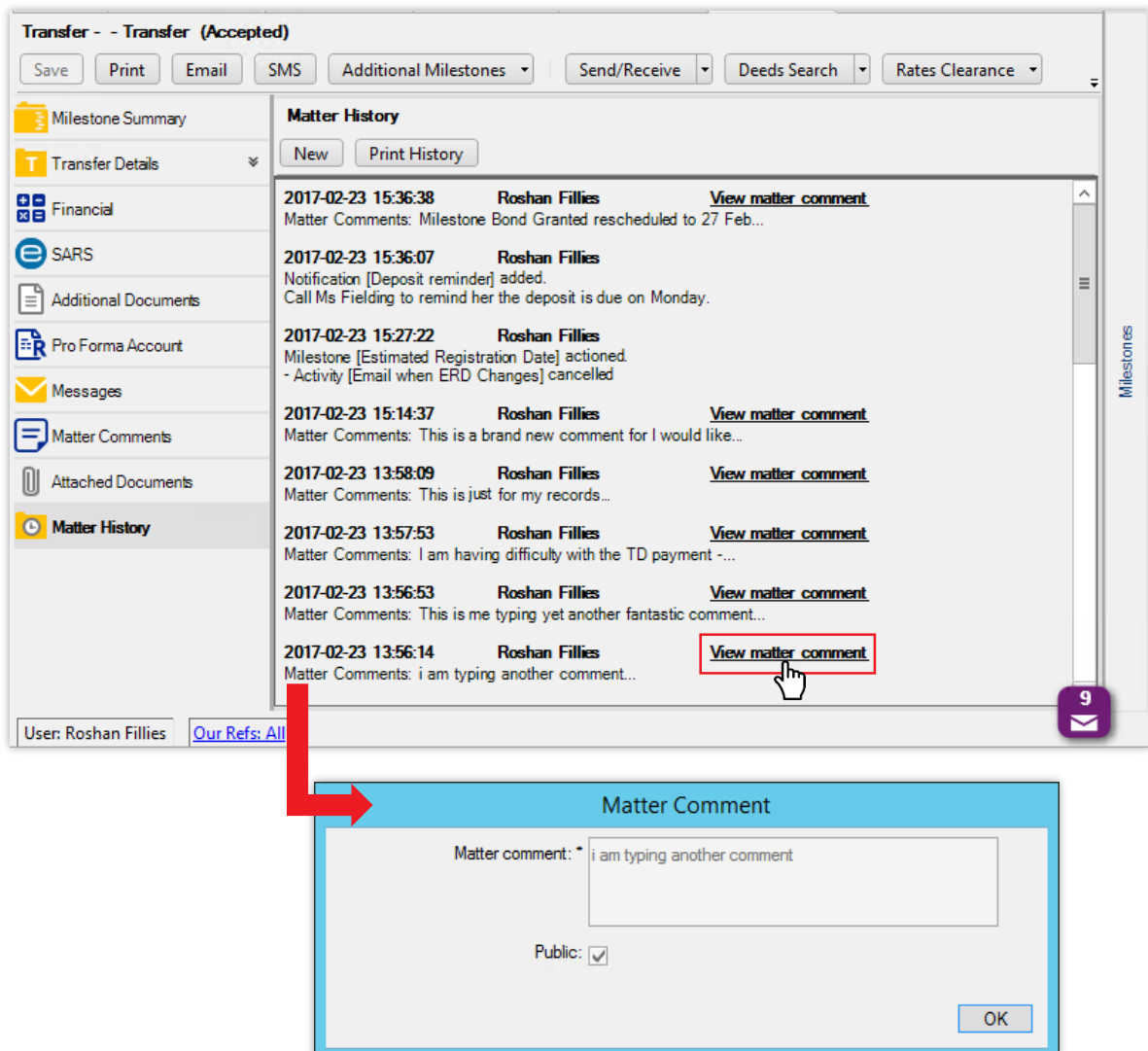
Double-click on an item in the **Comment** column to read the full comment.

Note: Comments can be exported as csv files. You can export the full list by clicking on **Export to CSV**, or export the **filtered** list by selecting one of the highlighted filtering options.

The highlighted menus appear when you right-click within the comments list.

Matter Comments				
New				
Public	Comment	Date Added	User	Milestone
	<i>filter text</i>	<i>filter text</i>	<i>filter text</i>	<i>filter text</i>
<input checked="" type="checkbox"/>	Milestone Bond Granted rescheduled to 27 Feb 17. Reason: As per a...	2017-02-23 15:36:38	Roshan Fillies	Bond Granted
<input checked="" type="checkbox"/>	This is a brand new comment for I would like the Bond Attorney and E...	2017-02-23 14:41:50	Roshan Fillies	
<input type="checkbox"/>	This is just for my records	2017-02-23 13:57:55	Roshan Fillies	
<input checked="" type="checkbox"/>	I am having difficulty with the TD payment - I may need to have the C...	2017-02-23 13:56:55	Roshan Fillies	
<input type="checkbox"/>	This is me typing yet another fantastic comment but I only want this to ...	2017-02-23 13:56:18	Roshan Fillies	
<input checked="" type="checkbox"/>	i am typing another comment	2017-02-23 13:56:01	Roshan Fillies	
<input type="checkbox"/>	Milestone Rates Figures Requested rescheduled to 24 Feb 17. Reaso...	2017-02-23 10:07:20	Roshan Fillies	Rates Figures Requested

- Comments can be viewed on the **Matter History**. The comment is recorded in the same manner as all other matter activities, with a brief preview of the comment appearing in the body text of the recorded entry. To view the full matter comment details, click the **View matter comment** link next to the recorded entry.



Transfer - - Transfer (Accepted)

Save Print Email SMS Additional Milestones Send/Receive Deeds Search Rates Clearance

Matter History

New Print History

2017-02-23 15:36:38	Roshan Fillies	View matter comment
Matter Comments: Milestone Bond Granted rescheduled to 27 Feb...		
2017-02-23 15:36:07	Roshan Fillies	
Notification [Deposit reminder] added. Call Ms Fielding to remind her the deposit is due on Monday.		
2017-02-23 15:27:22	Roshan Fillies	
Milestone [Estimated Registration Date] actioned. - Activity [Email when ERD Changes] cancelled		
2017-02-23 15:14:37	Roshan Fillies	View matter comment
Matter Comments: This is a brand new comment for I would like...		
2017-02-23 13:58:09	Roshan Fillies	View matter comment
Matter Comments: This is just for my records...		
2017-02-23 13:57:53	Roshan Fillies	View matter comment
Matter Comments: I am having difficulty with the TD payment -...		
2017-02-23 13:56:53	Roshan Fillies	View matter comment
Matter Comments: This is me typing yet another fantastic comment...		
2017-02-23 13:56:14	Roshan Fillies	View matter comment
Matter Comments: i am typing another comment...		

User: Roshan Fillies [Our Refs: All](#)

Matter Comment

Matter comment: * i am typing another comment

Public: ☒

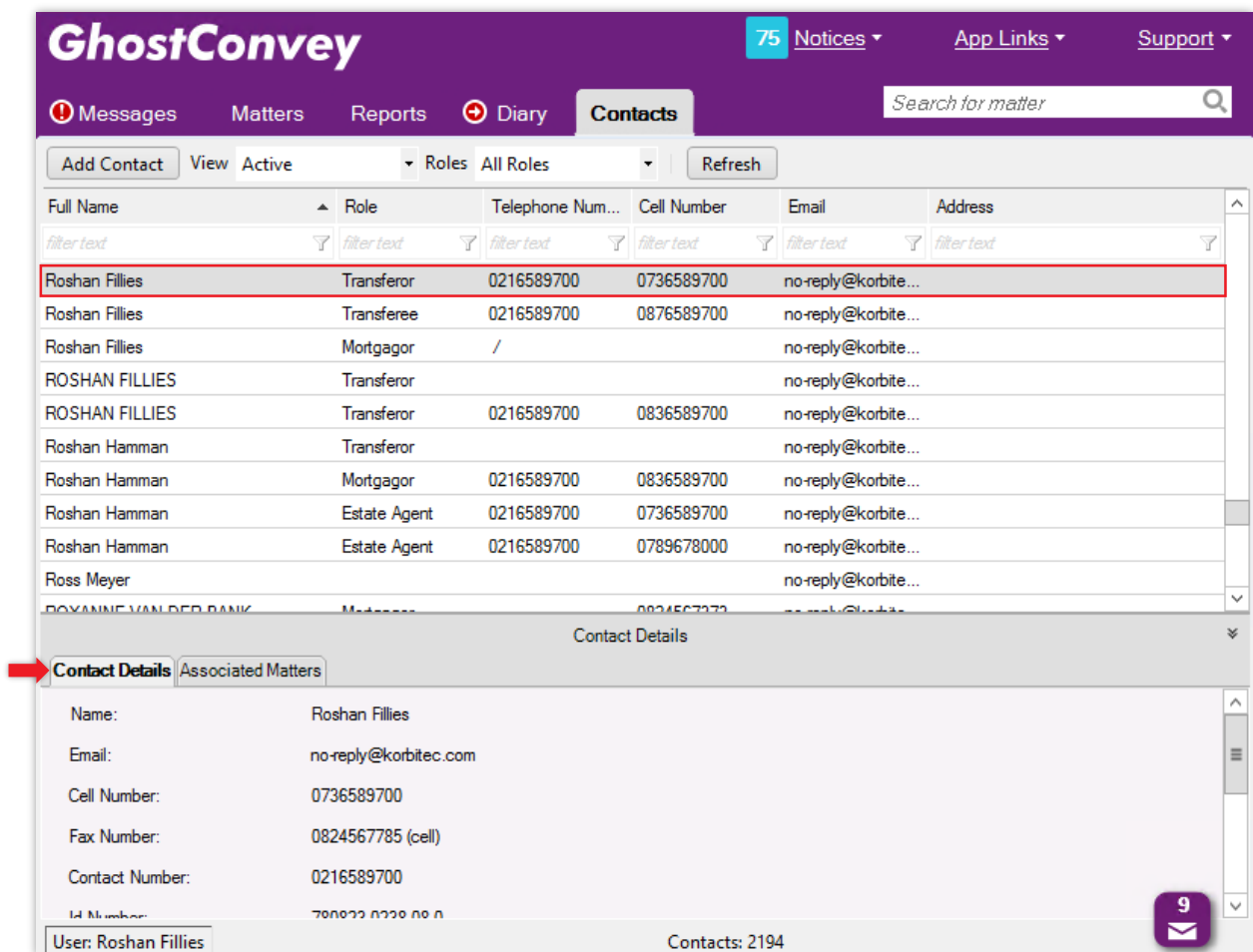
OK

Note: The last matter comment to be captured will feature in the Reports under the **Progress Comments** column. For a full audit trail it will be necessary consult the **Matter Comments** and/or **Matter History** menus.

Global Contacts Tab

The **Contacts** tab is a new GhostConvey feature that allows you to select and import contacts stored within your existing GhostConvey database, across matters. The global contacts list is *automatically updated* with every matter created. You can also manually add and edit contacts, as we will explain further on.

- The pane at the bottom of the window shows you the contact information for the highlighted party on the **Contact Details** tab.
- If you click on the **Associated Matters** tab, you will be able to see which matters the selected contact is linked to and in what capacity.



GhostConvey 75 Notices ▾ App Links ▾ Support ▾

Messages Matters Reports **Diary** **Contacts** Search for matter 🔍

Add Contact View Active Roles All Roles Refresh

Full Name	Role	Telephone Num...	Cell Number	Email	Address
<i>filter text</i>	<i>filter text</i>	<i>filter text</i>	<i>filter text</i>	<i>filter text</i>	<i>filter text</i>
Roshan Fillies	Transferor	0216589700	0736589700	no-reply@korbite...	
Roshan Fillies	Transferee	0216589700	0876589700	no-reply@korbite...	
Roshan Fillies	Mortgagor	/		no-reply@korbite...	
ROSHAN FILLIES	Transferor			no-reply@korbite...	
ROSHAN FILLIES	Transferor	0216589700	0836589700	no-reply@korbite...	
Roshan Hamman	Transferor			no-reply@korbite...	
Roshan Hamman	Mortgagor	0216589700	0836589700	no-reply@korbite...	
Roshan Hamman	Estate Agent	0216589700	0736589700	no-reply@korbite...	
Roshan Hamman	Estate Agent	0216589700	0789678000	no-reply@korbite...	
Ross Meyer				no-reply@korbite...	
ROXANNE VAN DER BANK	Mortgagor	0824567785	0824567785	no-reply@korbite...	

Contact Details

Contact Details Associated Matters

Name: Roshan Fillies

Email: no-reply@korbitec.com

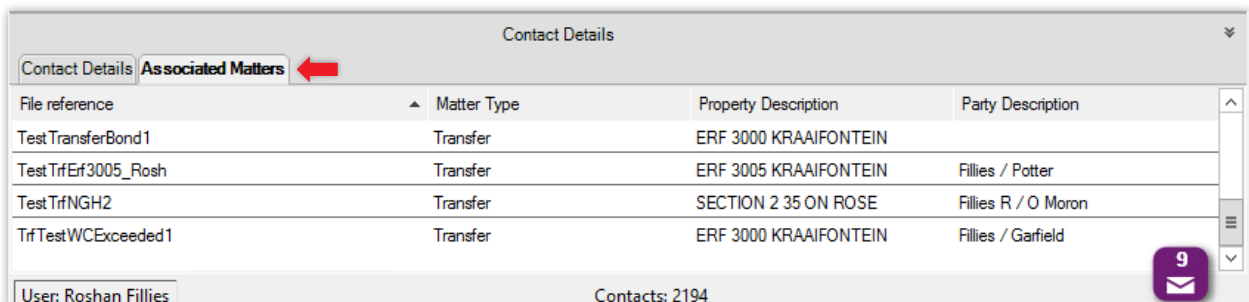
Cell Number: 0736589700

Fax Number: 0824567785 (cell)

Contact Number: 0216589700

Id Number: 780022 0228 00 0

User: Roshan Fillies Contacts: 2194



Contact Details

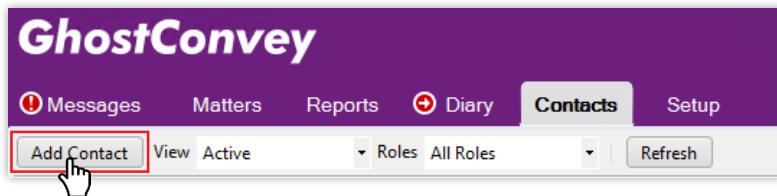
Contact Details **Associated Matters**

File reference	Matter Type	Property Description	Party Description
TestTransferBond1	Transfer	ERF 3000 KRAAIFONTEIN	
TestTrf3005_Rosh	Transfer	ERF 3005 KRAAIFONTEIN	Fillies / Potter
TestTrfNGH2	Transfer	SECTION 2 35 ON ROSE	Fillies R / O Moron
TrfTestWCExceeded1	Transfer	ERF 3000 KRAAIFONTEIN	Fillies / Garfield

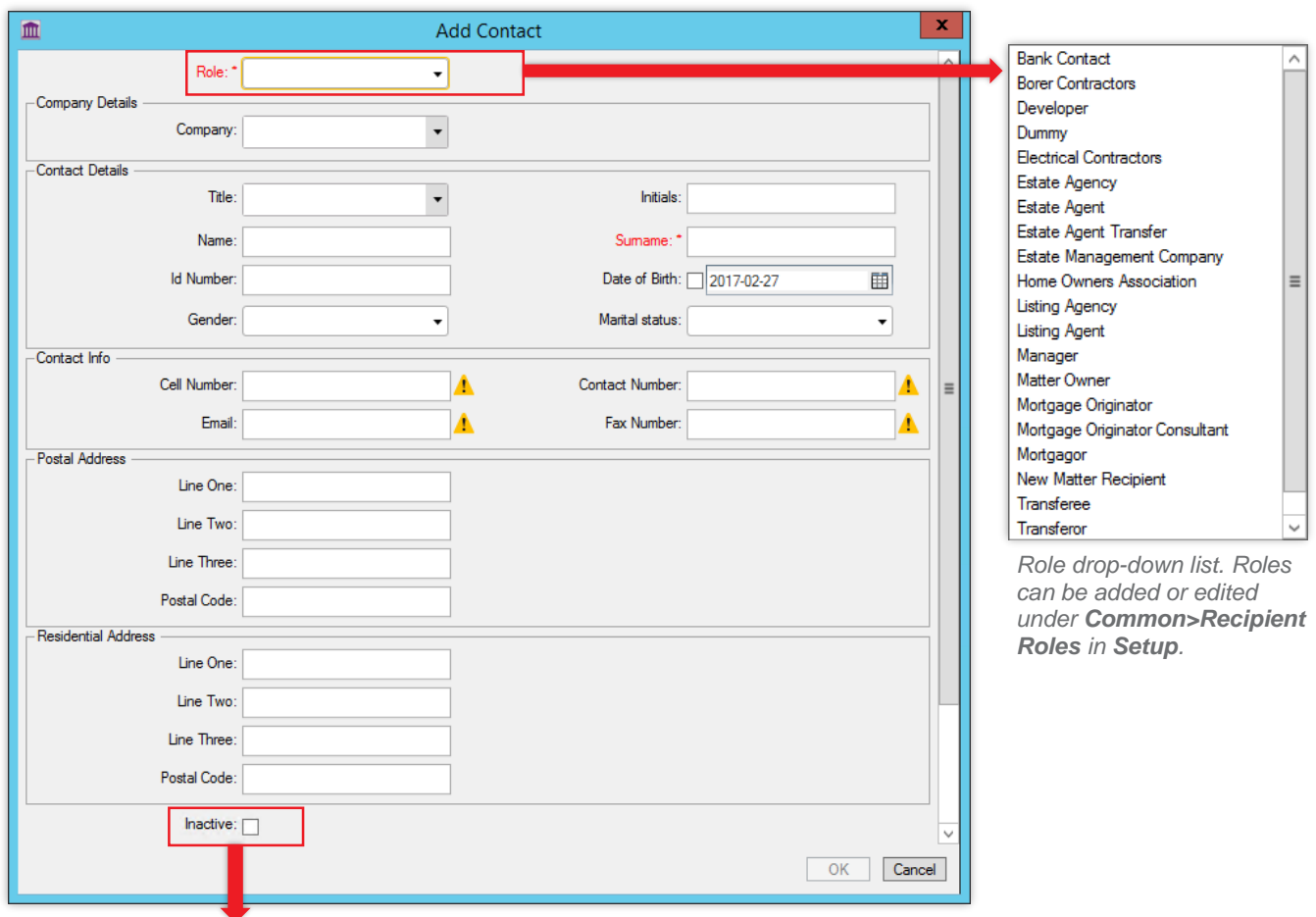
User: Roshan Fillies Contacts: 2194

Adding a contact to the global list

1. To manually add a new contact, click the **Add Contact** button on the toolbar.



2. Complete the **Add Contact** form, paying particular attention to the **Role** and other mandatory fields which are highlighted in red and / or indicated with a warning icon [!]. Click OK to save the new contact when you are done.



Add Contact

Role: * [Dropdown]

Company Details

Company: [Dropdown]

Contact Details

Title: [Dropdown] Initials: [Text]

Name: [Text] Surname: * [Text]

Id Number: [Text] Date of Birth: [Date Picker] 2017-02-27

Gender: [Dropdown] Marital status: [Dropdown]

Contact Info

Cell Number: [Text] [Warning Icon] Contact Number: [Text] [Warning Icon]

Email: [Text] [Warning Icon] Fax Number: [Text] [Warning Icon]

Postal Address

Line One: [Text]

Line Two: [Text]

Line Three: [Text]

Postal Code: [Text]

Residential Address

Line One: [Text]

Line Two: [Text]

Line Three: [Text]

Postal Code: [Text]

Inactive: ☐

OK Cancel

Role drop-down list. Roles can be added or edited under **Common>Recipient Roles in Setup.**

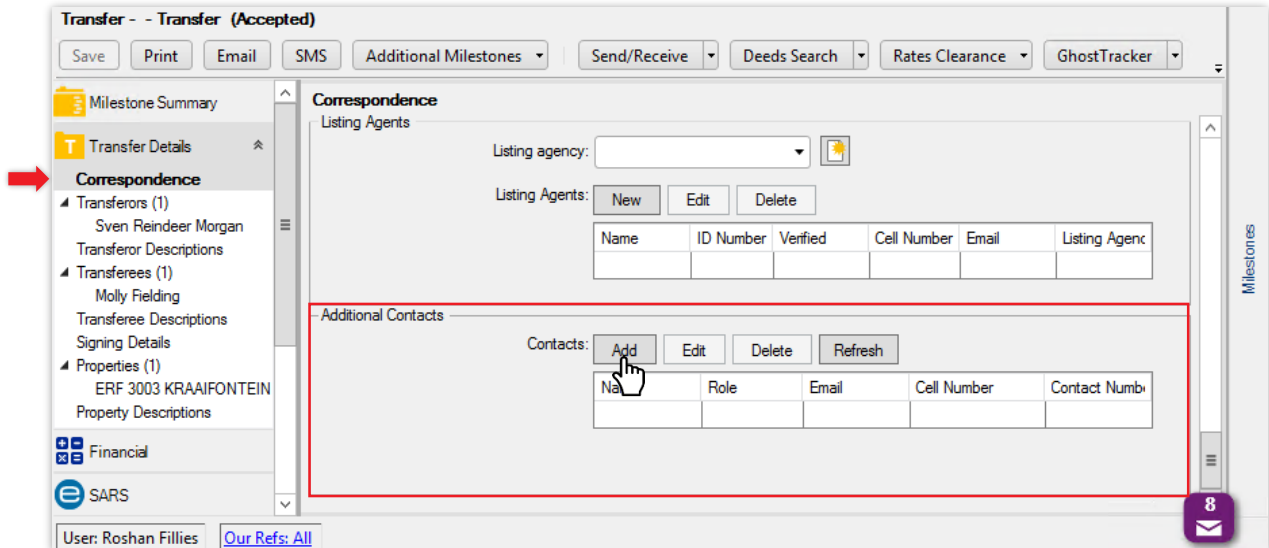
- Bank Contact
- Borer Contractors
- Developer
- Dummy
- Electrical Contractors
- Estate Agency
- Estate Agent
- Estate Agent Transfer
- Estate Management Company
- Home Owners Association
- Listing Agency
- Listing Agent
- Manager
- Matter Owner
- Mortgage Originator
- Mortgage Originator Consultant
- Mortgagor
- New Matter Recipient
- Transferee
- Transferor

Note: You have the option to indicate whether a contact is active or inactive. Inactive contacts are typically associated with archived matters.

Importing a contact to a matter

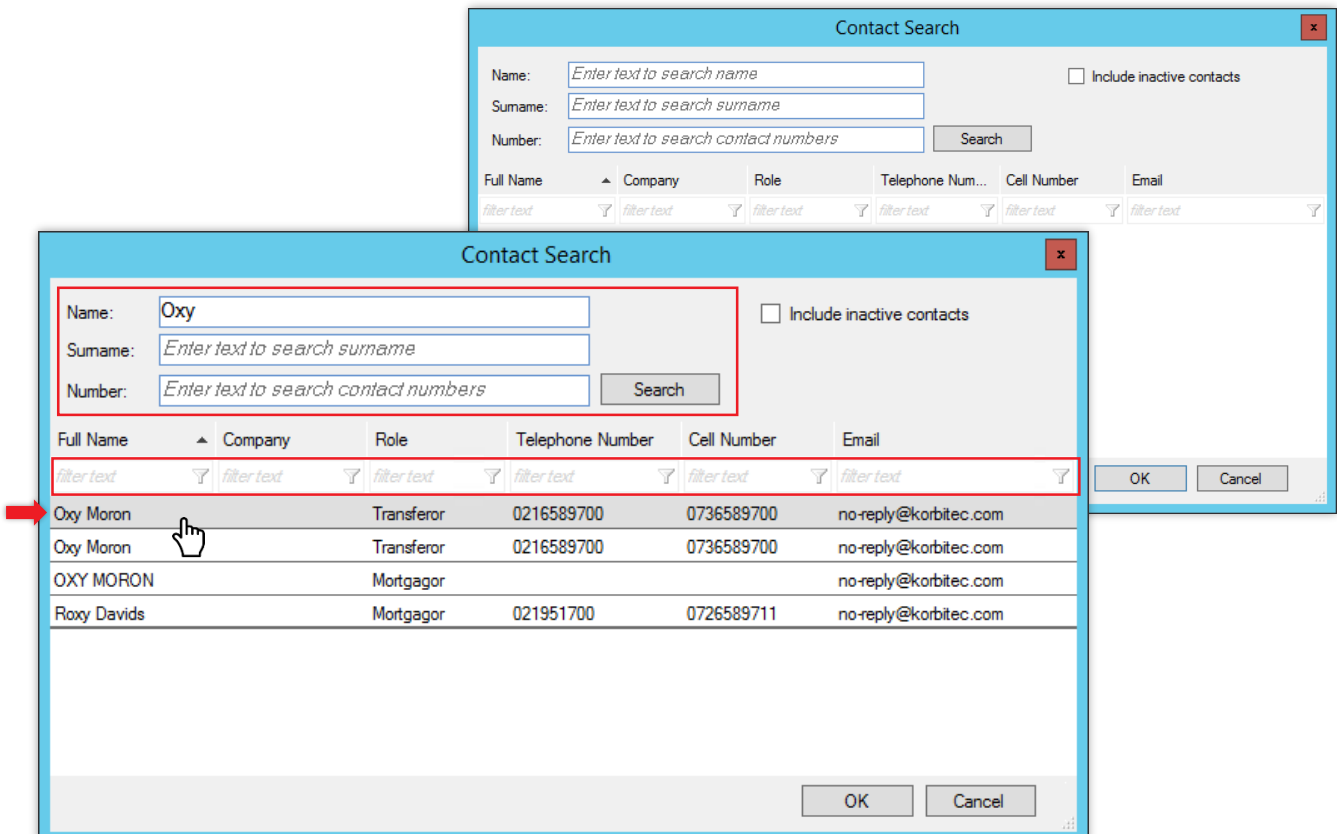
You can import a contact from the global list into your matter. This is done under **Additional Contacts** on the **Correspondence** sub-menu of your matter.

1. To import a contact, click the **Add** button.



The screenshot shows the 'Transfer - Transfer (Accepted)' window. The left sidebar has a tree view with 'Correspondence' selected. The main area shows the 'Correspondence' sub-menu with 'Listing Agents' and 'Additional Contacts' sections. The 'Additional Contacts' section is highlighted with a red box, and the 'Add' button is being clicked by a mouse cursor.

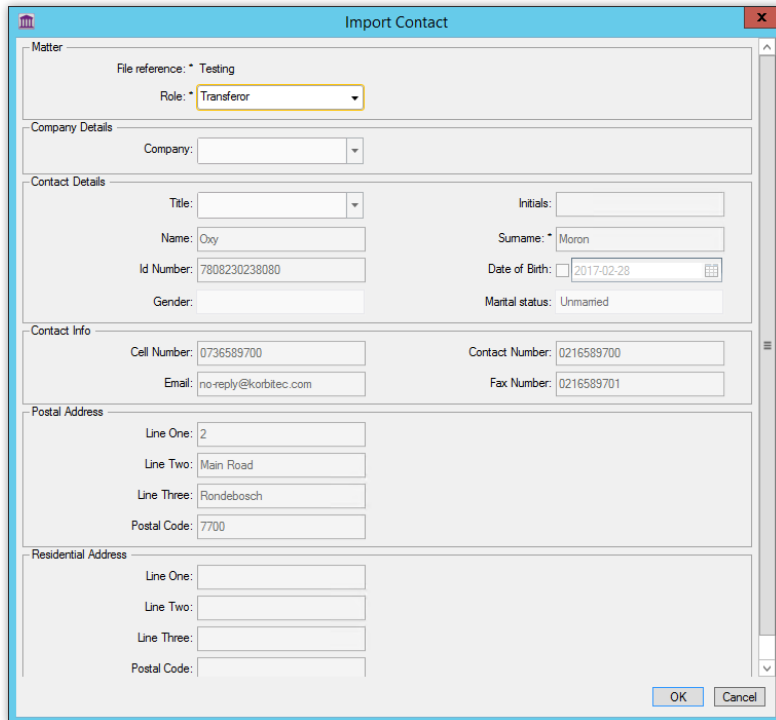
2. A **Contact Search** window will open. Here you can search on the *name*, *surname* or *contact number* of the person you want to add. If the list is lengthy you can *filter* the search results according to the column headings. Double-click on a contact to select it, or select the contact and click **OK**.



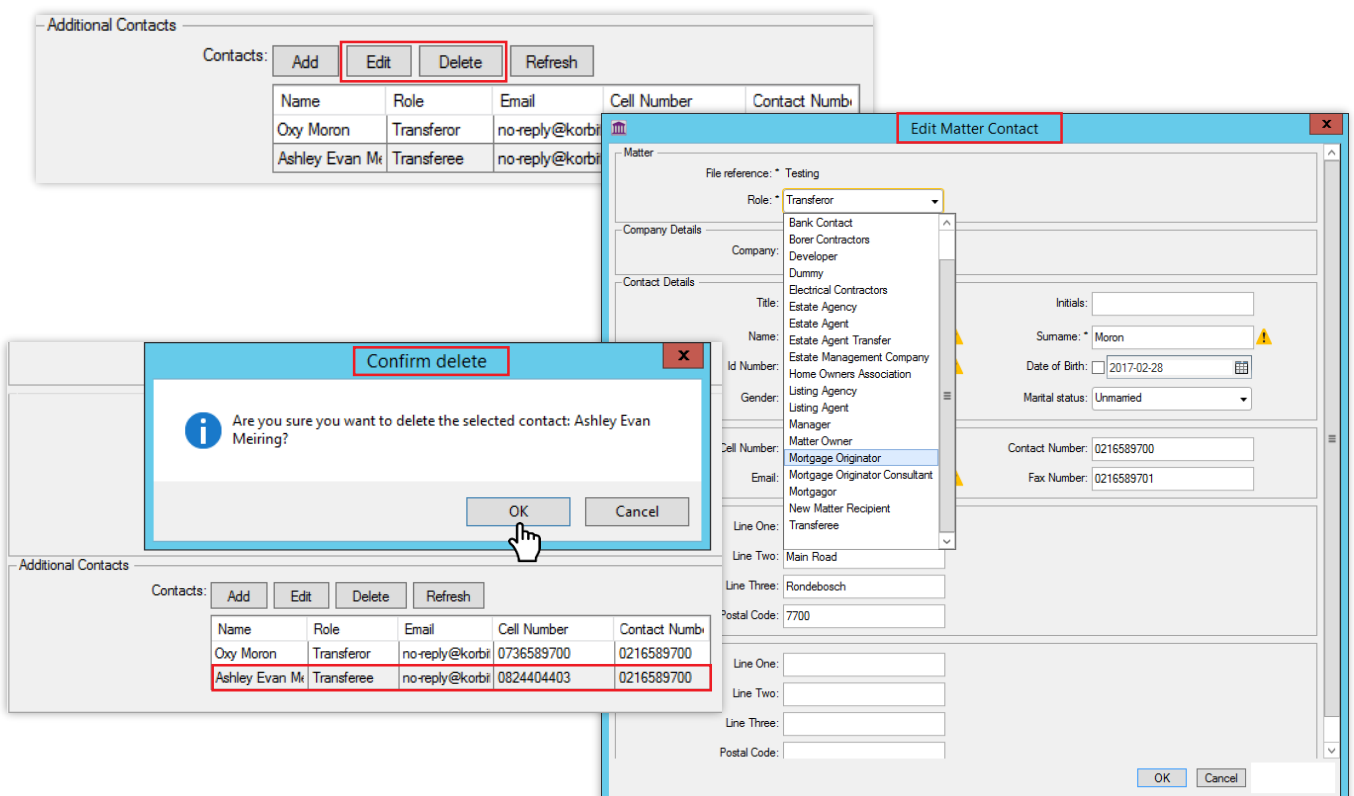
The screenshot shows the 'Contact Search' window. The search criteria fields (Name, Surname, Number) are highlighted with a red box. The search results table is shown below, with columns: Full Name, Company, Role, Telephone Number, Cell Number, and Email. The first row of results, 'Oxy Moron', is highlighted with a red box and a red arrow points to it.

Full Name	Company	Role	Telephone Number	Cell Number	Email
Oxy Moron		Transferor	0216589700	0736589700	no-reply@korbitec.com
Oxy Moron		Transferor	0216589700	0736589700	no-reply@korbitec.com
OXY MORON		Mortgagor			no-reply@korbitec.com
Roxy Davids		Mortgagor	021951700	0726589711	no-reply@korbitec.com

- The selected contact's information will appear on your screen. The only editable detail on this screen is the **Role**. Click the drop-down arrow and select the appropriate role for the contact then click OK.



- If necessary, you can **edit** or **delete** any contacts you have added. To edit contact information, simply select the contact and update the details on the **Edit Matter Contact** screen. When deleting a contact, you will be prompted for confirmation before the contact is deleted.



Additional Contacts

Name	Role	Email	Cell Number	Contact Number
Oxy Moron	Transferor	no-reply@korbi	0736589700	0216589700
Ashley Evan Meiring	Transferee	no-reply@korbi	0824404403	0216589700

Edit Matter Contact

File reference: * Testing

Role: * Transferor

Company: *

Company Details

Company: *

Contact Details

Title: *

Name: Oxy

Id Number: 7808230238080

Initials: *

Surname: * Moron

Date of Birth: 2017-02-28

Gender: *

Marital status: Unmarried

Contact Info

Cell Number: 0736589700

Contact Number: 0216589700

Email: no-reply@korbi

Fax Number: 0216589701

Postal Address

Line One: 2

Line Two: Main Road

Line Three: Rondebosch

Postal Code: 7700

Residential Address

Line One: *

Line Two: *

Line Three: *

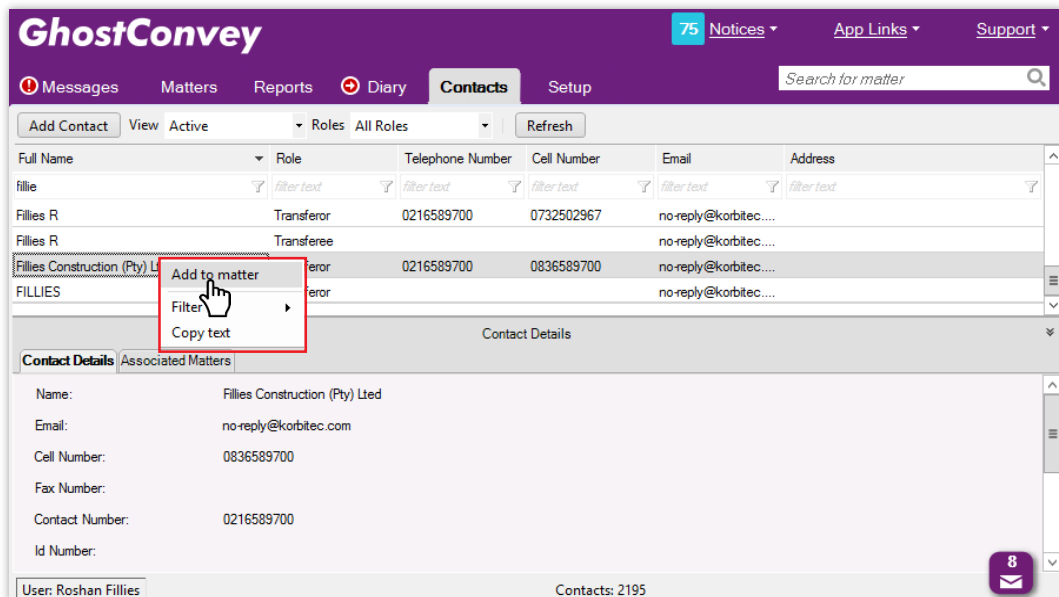
Postal Code: *

Confirm delete

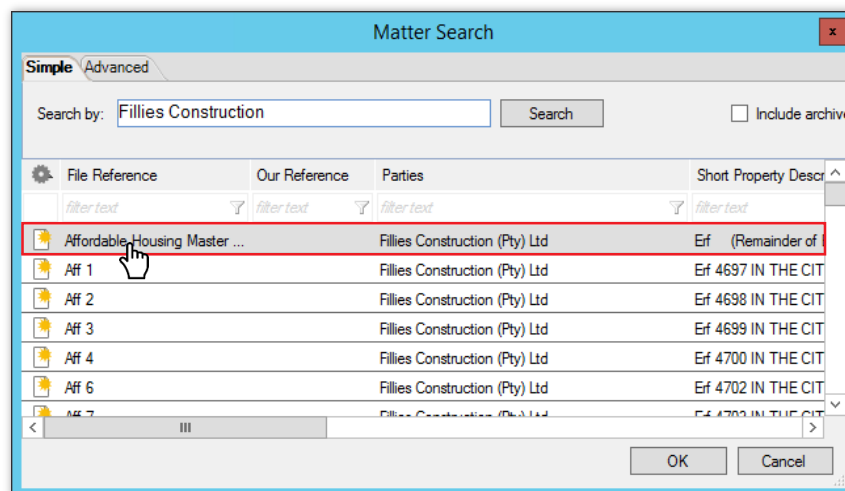
Are you sure you want to delete the selected contact: Ashley Evan Meiring?

OK Cancel

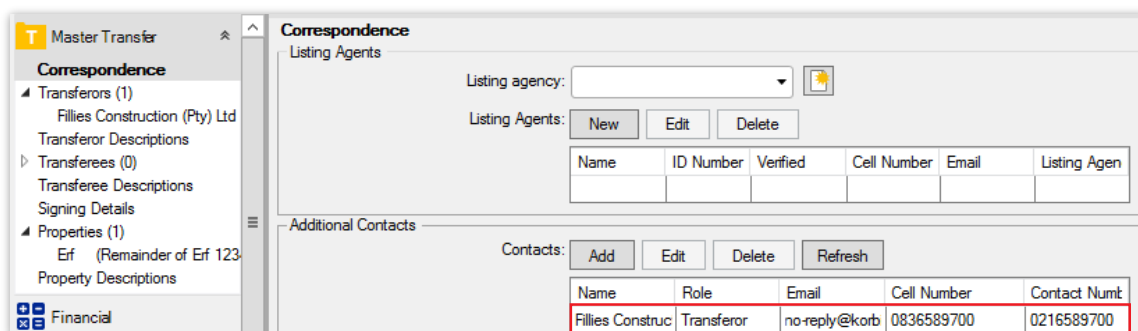
- You can add a contact to a matter directly from the global contacts list, by right-clicking on a contact and selecting the **Add to matter** option.



- A matter search window will open allowing you to search for and select the matter to add the contact to.

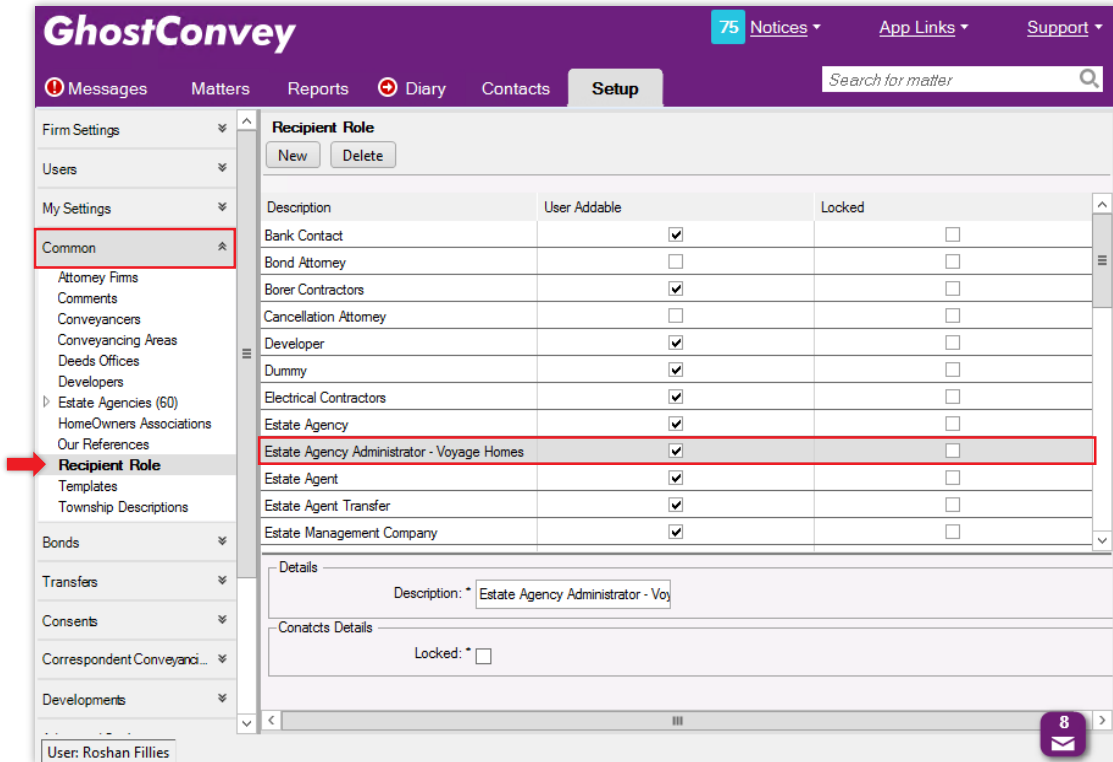


- The contact will be added to the **Additional Contacts** section of the selected matter.



Custom contact roles

Custom contact roles can be defined in **Setup** on the **Common** tab under the **Recipient Role** category. This is useful if your firm deals with specific stakeholders across different matters on a regular basis as it allows you to add specific roles for reporting purposes.



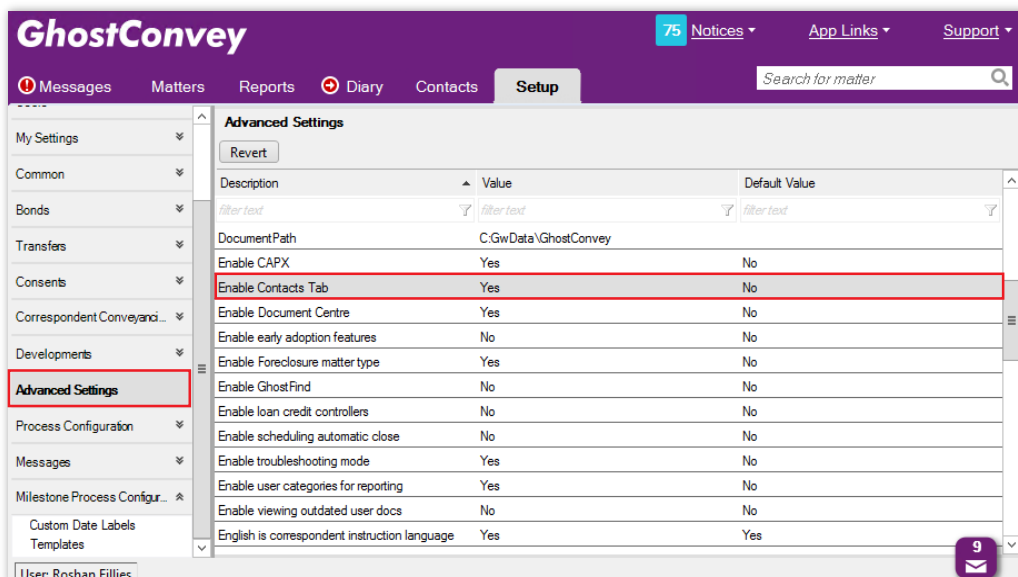
The screenshot shows the GhostConvey Setup page. The left sidebar has a red box around the 'Common' tab and a red arrow pointing to the 'Recipient Role' option. The main content area shows the 'Recipient Role' configuration table.

Description	User Addable	Locked
Bank Contact	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Bond Attorney	<input type="checkbox"/>	<input type="checkbox"/>
Borer Contractors	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cancellation Attorney	<input type="checkbox"/>	<input type="checkbox"/>
Developer	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Dummy	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Electrical Contractors	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Estate Agency	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Estate Agency Administrator - Voyage Homes	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Estate Agent	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Estate Agent Transfer	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Estate Management Company	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Below the table, the 'Details' section shows the description 'Estate Agency Administrator - Voj' and the 'Locked' checkbox is unchecked.

Activating Contacts

The **Contacts** tab is not switched on by default. The setting is located in **Setup** under the **Advanced Settings** menu and can only be activated by a GhostConvey System Administrator. Once activated it is always available from the tabs list on the banner.



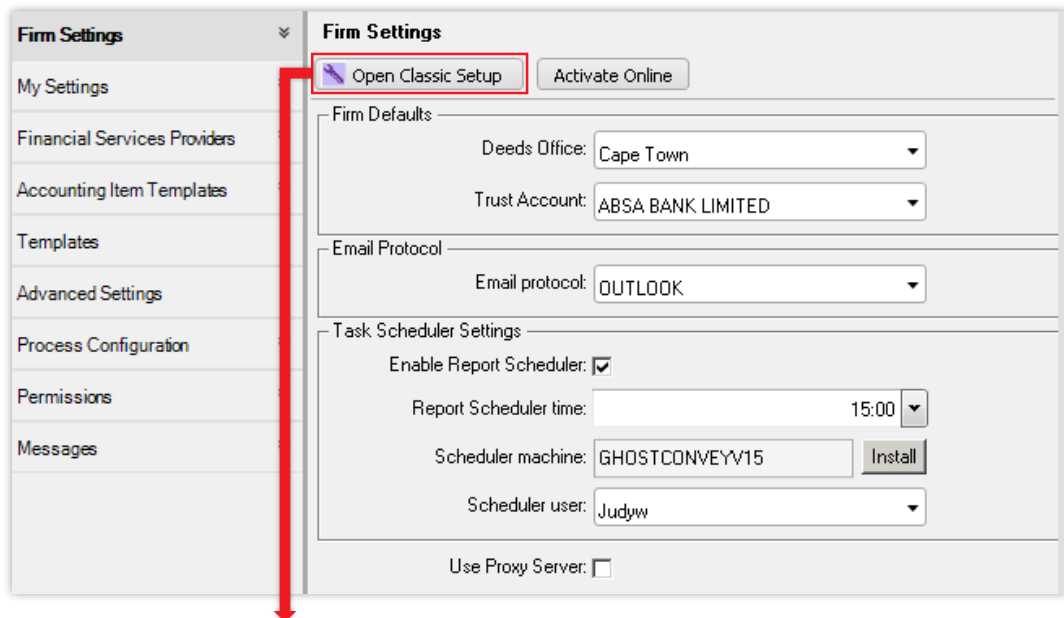
The screenshot shows the GhostConvey Setup page with the 'Advanced Settings' tab selected. The 'Enable Contacts Tab' setting is highlighted with a red box.

Description	Value	Default Value
DocumentPath	C:\GwData\GhostConvey	
Enable CAPX	Yes	No
Enable Contacts Tab	Yes	No
Enable Document Centre	Yes	No
Enable early adoption features	No	No
Enable Foreclosure matter type	Yes	No
Enable GhostFind	No	No
Enable loan credit controllers	No	No
Enable scheduling automatic close	No	No
Enable troubleshooting mode	Yes	No
Enable user categories for reporting	Yes	No
Enable viewing outdated user docs	No	No
English is correspondent instruction language	Yes	Yes

Setup

Classic Setup Migration

The **Open Classic Setup** button has been removed and all previously classic GhostConvey settings are now consolidated under the **Setup** tab.



Firm Settings

My Settings

Financial Services Providers

Accounting Item Templates

Templates

Advanced Settings

Process Configuration

Permissions

Messages

Open Classic Setup

Firm Defaults

Deeds Office: Cape Town

Trust Account: ABSA BANK LIMITED

Email Protocol

Email protocol: OUTLOOK

Task Scheduler Settings

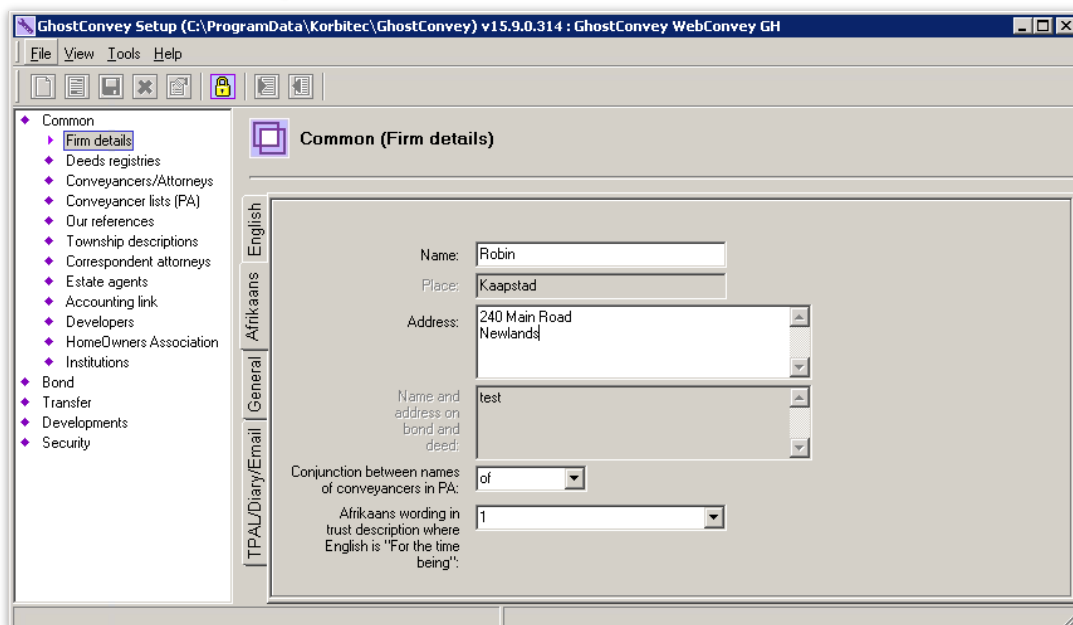
Enable Report Scheduler: ☒

Report Scheduler time: 15:00

Scheduler machine: GHOSTCONVEYV15

Scheduler user: Judyw

Use Proxy Server: ☐



GhostConvey Setup (C:\ProgramData\Korbitec\GhostConvey) v15.9.0.314 : GhostConvey WebConvey GH

File View Tools Help

Common

- Firm details
- Deeds registries
- Conveyancers/Attorneys
- Conveyancer lists (PA)
- Our references
- Township descriptions
- Correspondent attorneys
- Estate agents
- Accounting link
- Developers
- HomeOwners Association
- Institutions
- Bond
- Transfer
- Developments
- Security

English Afrikaans General TPAU/Diary/Email

Common (Firm details)

Name: Robin

Place: Kaapstad

Address: 240 Main Road Newlands

Name and address on bond and deed: test

Conjunction between names of conveyancers in PA: of

Afrikaans wording in trust description where English is "For the time being": 1

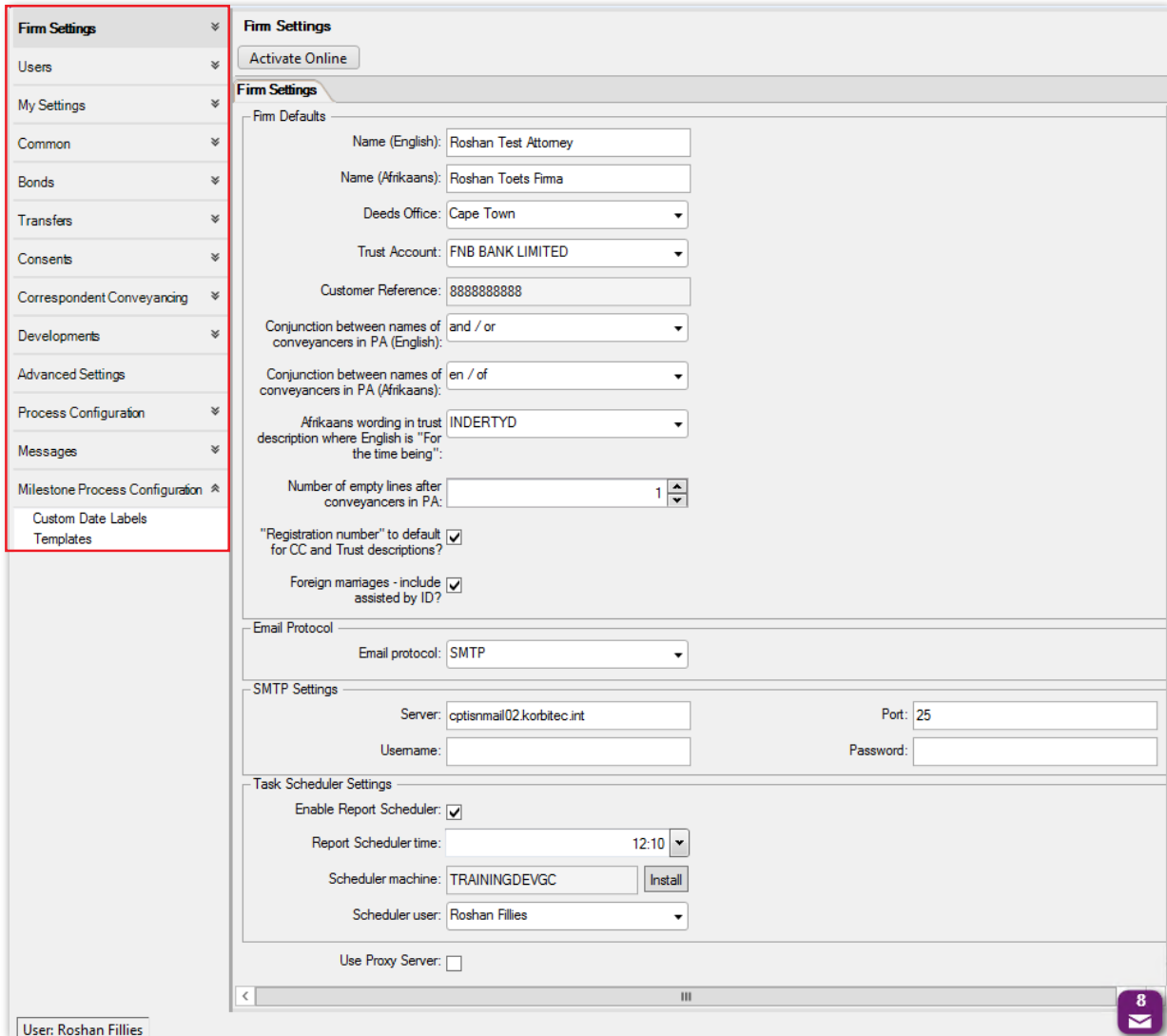
Note: It is recommended that **Setup** operations only be accessed by the designated system administrator(s) at the Firm as changes made here affect all GhostConvey users.

Menu panel

The menu panel gives you access to the various functional settings for GhostConvey. The arrows [▼] at the end of each menu button indicate that there are additional sub-categories grouped under the main menu.

With the version 16 update, changes have been made that affect the look and feel of the following **Setup** features:

- Users
- Common
- Bonds
- Transfers
- Consents
- Correspondent Conveyancing
- Developments
- Advanced Settings



Firm Settings ▼

Users ▼

My Settings ▼

Common ▼

Bonds ▼

Transfers ▼

Consents ▼

Correspondent Conveyancing ▼

Developments ▼

Advanced Settings ▼

Process Configuration ▼

Messages ▼

Milestone Process Configuration ▲

Custom Date Labels

Templates

Firm Settings

Activate Online

Firm Settings

Firm Defaults

Name (English): Roshan Test Attorney

Name (Afrikaans): Roshan Toets Firma

Deeds Office: Cape Town ▼

Trust Account: FNB BANK LIMITED ▼

Customer Reference: 888888888

Conjunction between names of conveyancers in PA (English): and / or ▼

Conjunction between names of conveyancers in PA (Afrikaans): en / of ▼

Afrikaans wording in trust description where English is "For the time being": INDERTYD ▼

Number of empty lines after conveyancers in PA: 1 ▲▼

"Registration number" to default for CC and Trust descriptions? ☒

Foreign marriages - include assisted by ID? ☒

Email Protocol

Email protocol: SMTP ▼

SMTP Settings

Server: cptisnmail02.korbitec.int

Port: 25

Username:

Password:

Task Scheduler Settings

Enable Report Scheduler: ☒

Report Scheduler time: 12:10 ▼

Scheduler machine: TRAININGDEVGC Install

Scheduler user: Roshan Fillies ▼

Use Proxy Server: ☐

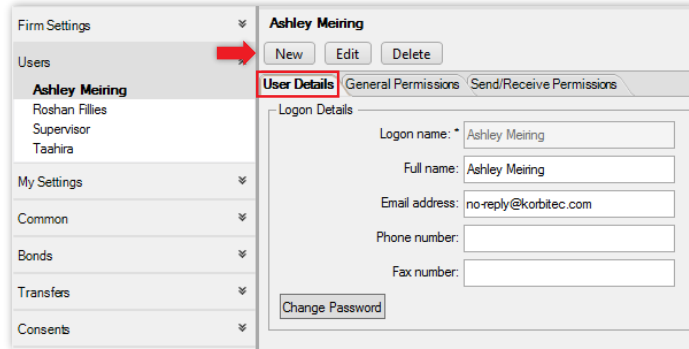
User: Roshan Fillies

8

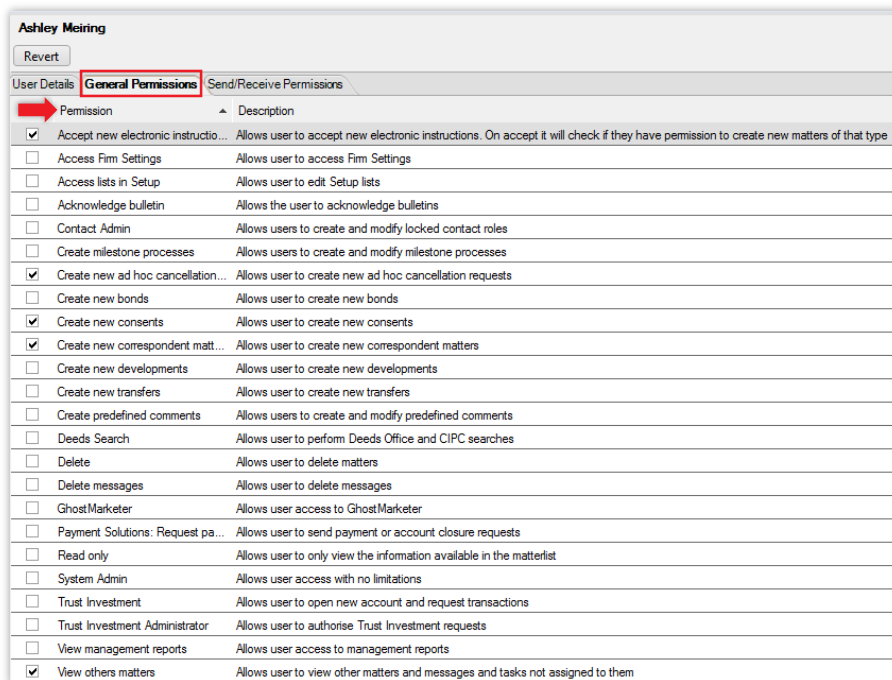
Users

The **Users** menu combines the previous **Permissions** menu and classic **Security** category. Here you can *add, edit or delete* users. The tabs at the top of the screen allow you to:

- Create new GhostConvey users under **User Details**

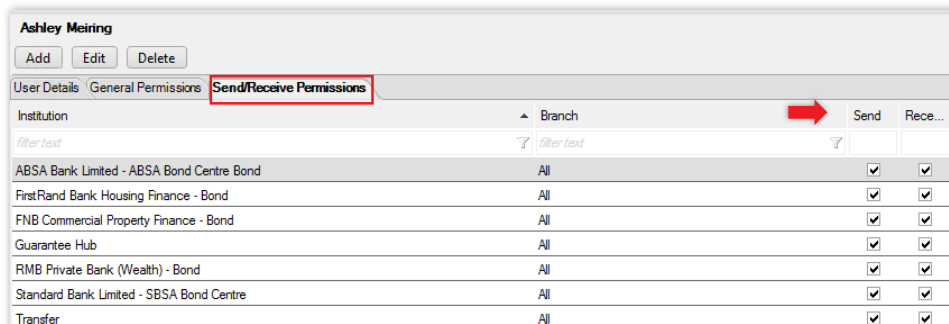


- Assign **General Permissions**



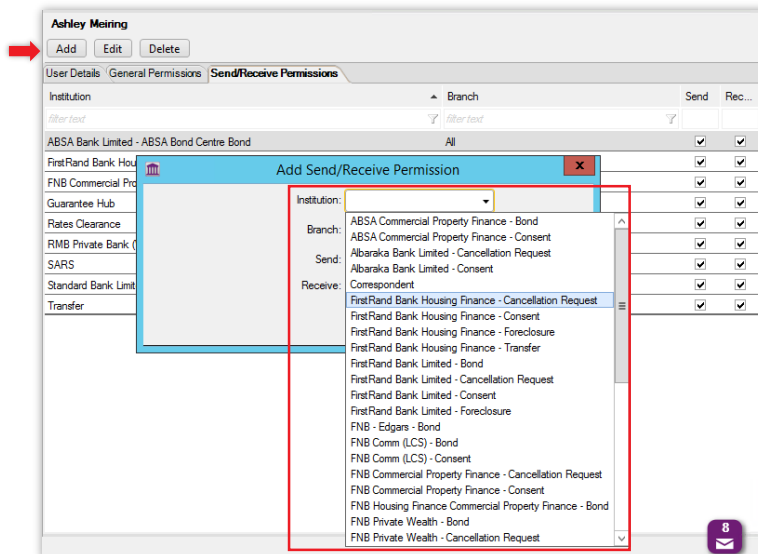
Permission	Description
<input checked="" type="checkbox"/> Accept new electronic instructions...	Allows user to accept new electronic instructions. On accept it will check if they have permission to create new matters of that type
<input type="checkbox"/> Access Firm Settings	Allows user to access Firm Settings
<input type="checkbox"/> Access lists in Setup	Allows user to edit Setup lists
<input type="checkbox"/> Acknowledge bulletin	Allows the user to acknowledge bulletins
<input type="checkbox"/> Contact Admin	Allows users to create and modify locked contact roles
<input type="checkbox"/> Create milestone processes	Allows users to create and modify milestone processes
<input checked="" type="checkbox"/> Create new ad hoc cancellation...	Allows user to create new ad hoc cancellation requests
<input type="checkbox"/> Create new bonds	Allows user to create new bonds
<input checked="" type="checkbox"/> Create new consents	Allows user to create new consents
<input checked="" type="checkbox"/> Create new correspondent matt...	Allows user to create new correspondent matters
<input type="checkbox"/> Create new developments	Allows user to create new developments
<input type="checkbox"/> Create new transfers	Allows user to create new transfers
<input type="checkbox"/> Create predefined comments	Allows users to create and modify predefined comments
<input type="checkbox"/> Deeds Search	Allows user to perform Deeds Office and CIPC searches
<input type="checkbox"/> Delete	Allows user to delete matters
<input type="checkbox"/> Delete messages	Allows user to delete messages
<input type="checkbox"/> GhostMarketer	Allows user access to GhostMarketer
<input type="checkbox"/> Payment Solutions: Request pa...	Allows user to send payment or account closure requests
<input type="checkbox"/> Read only	Allows user to only view the information available in the matterlist
<input type="checkbox"/> System Admin	Allows user access with no limitations
<input type="checkbox"/> Trust Investment	Allows user to open new account and request transactions
<input type="checkbox"/> Trust Investment Administrator	Allows user to authorise Trust Investment requests
<input type="checkbox"/> View management reports	Allows user access to management reports
<input checked="" type="checkbox"/> View others matters	Allows user to view other matters and messages and tasks not assigned to them

- Assign specific **Send/Receive Permissions**



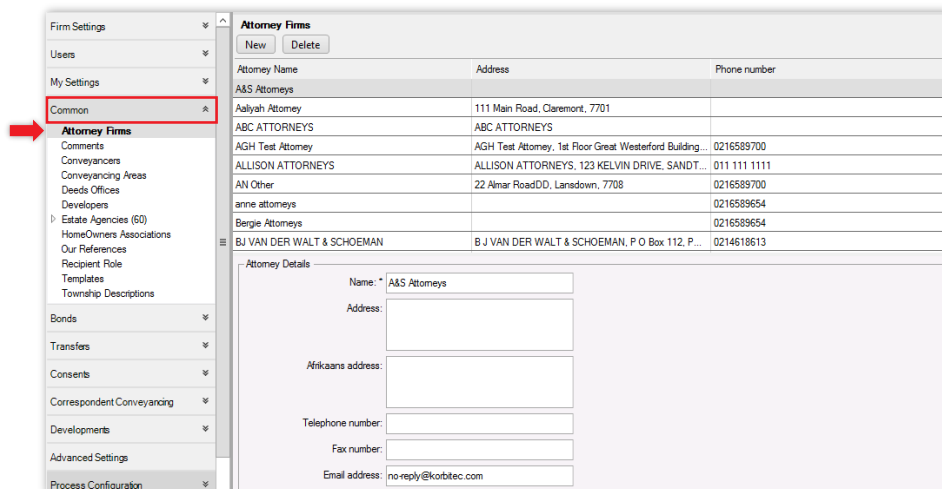
Institution	Branch	Send	Rece...
ABSA Bank Limited - ABSA Bond Centre Bond	All	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FirstRand Bank Housing Finance - Bond	All	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FNB Commercial Property Finance - Bond	All	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Guarantee Hub	All	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
RMB Private Bank (Wealth) - Bond	All	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Standard Bank Limited - SBSA Bond Centre	All	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Transfer	All	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- Add institutions to a GhostConvey user's Send/Receive list and set the appropriate permissions per institution.



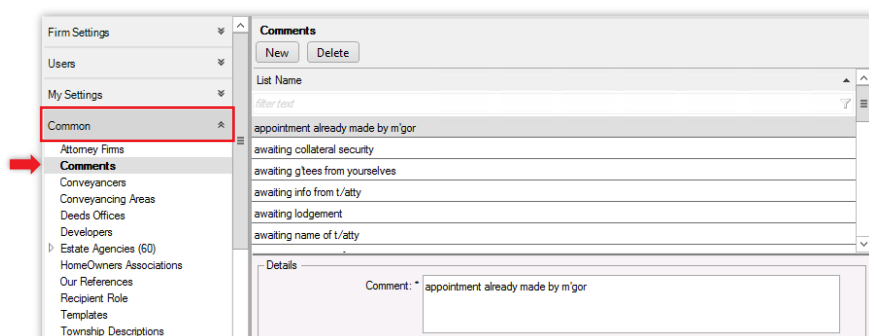
Common

- Previously *Correspondent Attorneys*, the new **Attorney Firms** category is where you can create and save the details of attorneys frequently used as lodging agents.

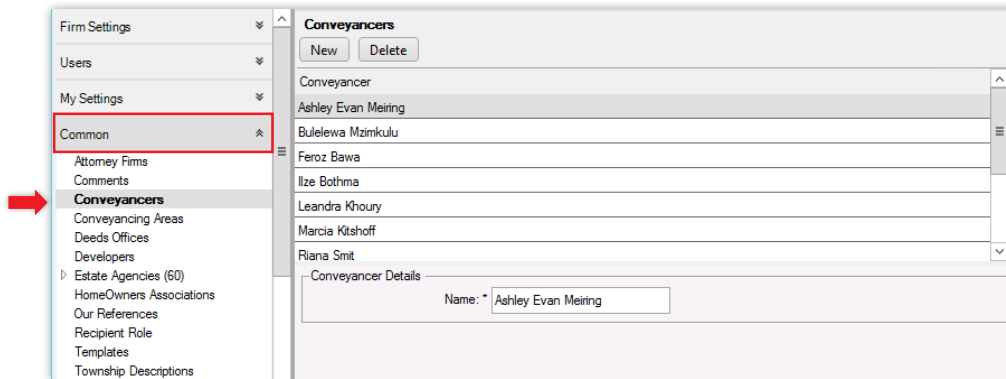


- The new **Comments** section houses a list of predefined comments and allows you to add additional customised comments. These user comments will appear in the predefined comments list when posting a matter comment.

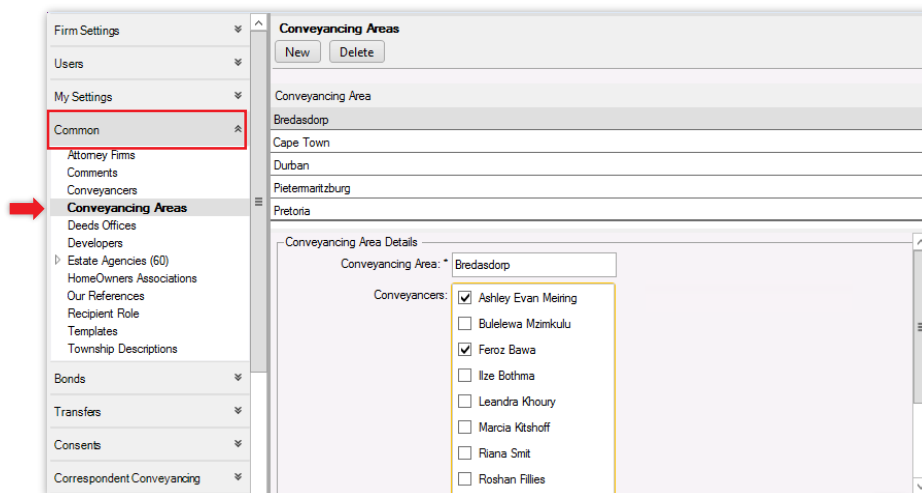
- Simply click on **New** to add a custom predefined comment.



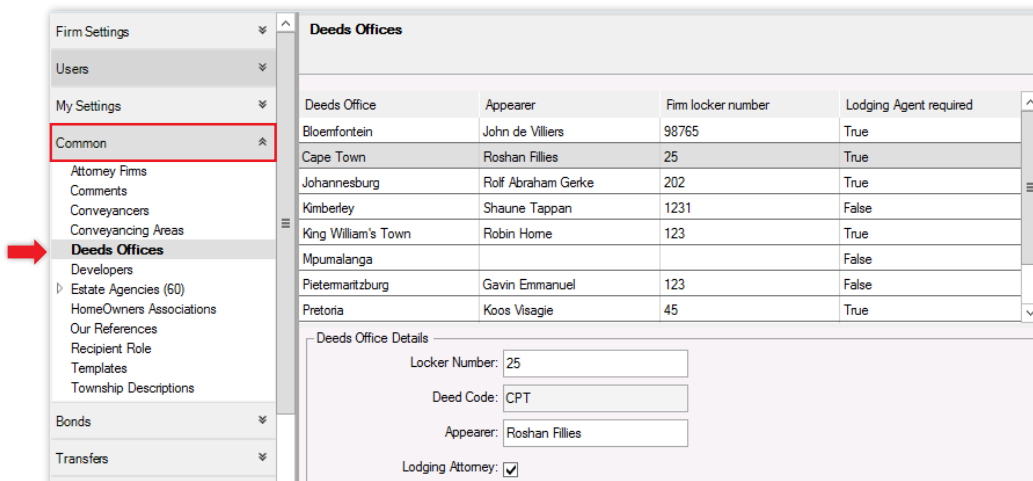
- The **Conveyancers** section (previously *Conveyancers / Attorneys*), contains the list of appearers and preparers and is where the conveyancers' list for the firm is managed.



- The **Conveyancing Areas** section (previously *Conveyancer lists (PA)*), is where the regional conveyancer lists are managed.
 - Simply click on an area and select / deselect the checkboxes next to the conveyancer's you wish to add to / remove from a particular region. Your progress is auto-saved.

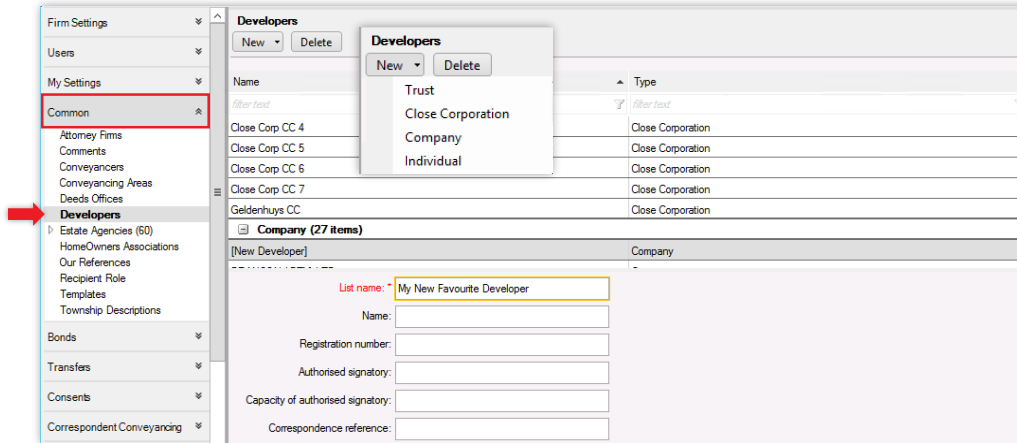


- Deeds Office** (previously *Deeds Registries*) is unchanged.
 - Simply click on a Deeds Office in the list and complete / update the **Deeds Office Details** section that relates to it.

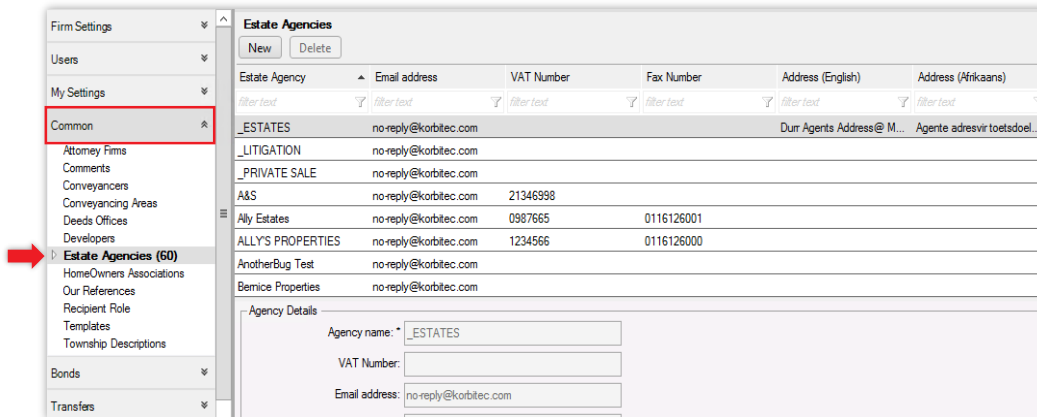


Deeds Office	Appearer	Firm locker number	Lodging Agent required
Bloemfontein	John de Villiers	98765	True
Cape Town	Roshan Filles	25	True
Johannesburg	Rolf Abraham Gerke	202	True
Kimberley	Shaune Tappan	1231	False
King William's Town	Robin Home	123	True
Mpumalanga			False
Pietermaritzburg	Gavin Emmanuel	123	False
Pretoria	Koos Visagie	45	True

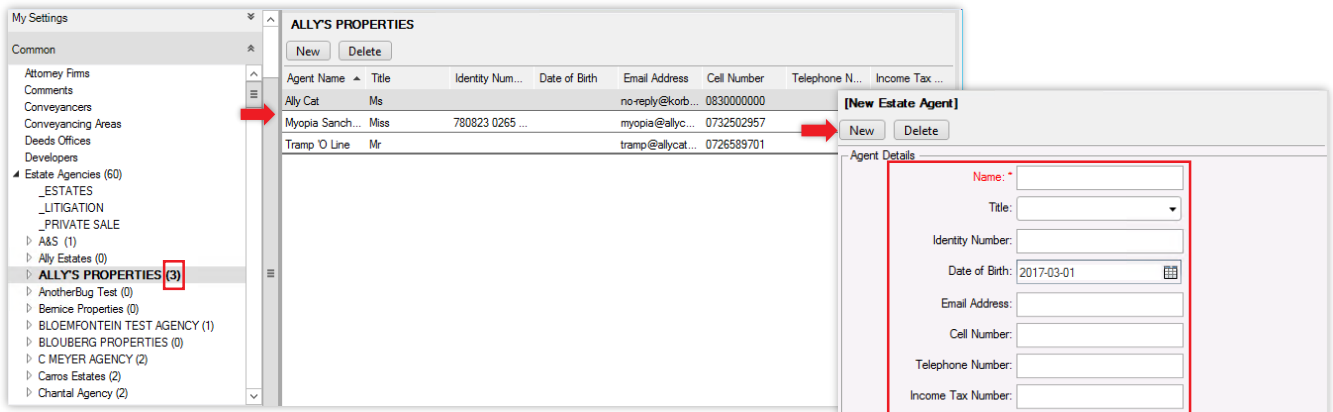
- The **Developers** category is new and is where you can now save details of developers the Firm frequently works with.
 - Add a new developer by clicking the **New** button, specifying the type of business entity and completing the relevant information.



- **Estate Agencies**, (previously *Estate Agents*) is unchanged.
 - Add a new agency by clicking the **New** button in the **Estate Agencies** list.

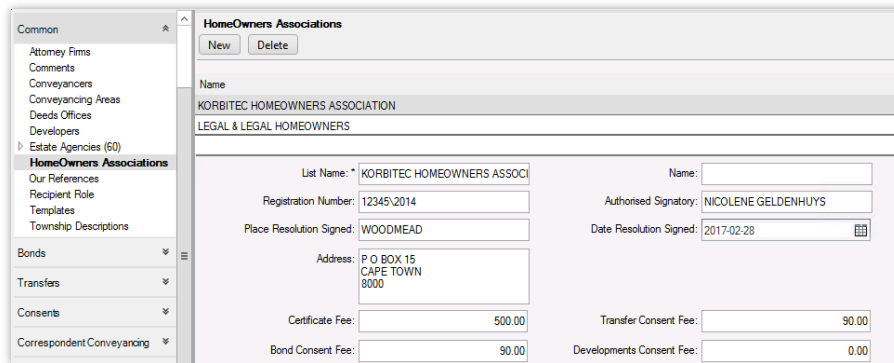


- The number in brackets next to the agency indicates the number of estate agents associated with it. Clicking on an agency will reveal the details of the associated estate agents.

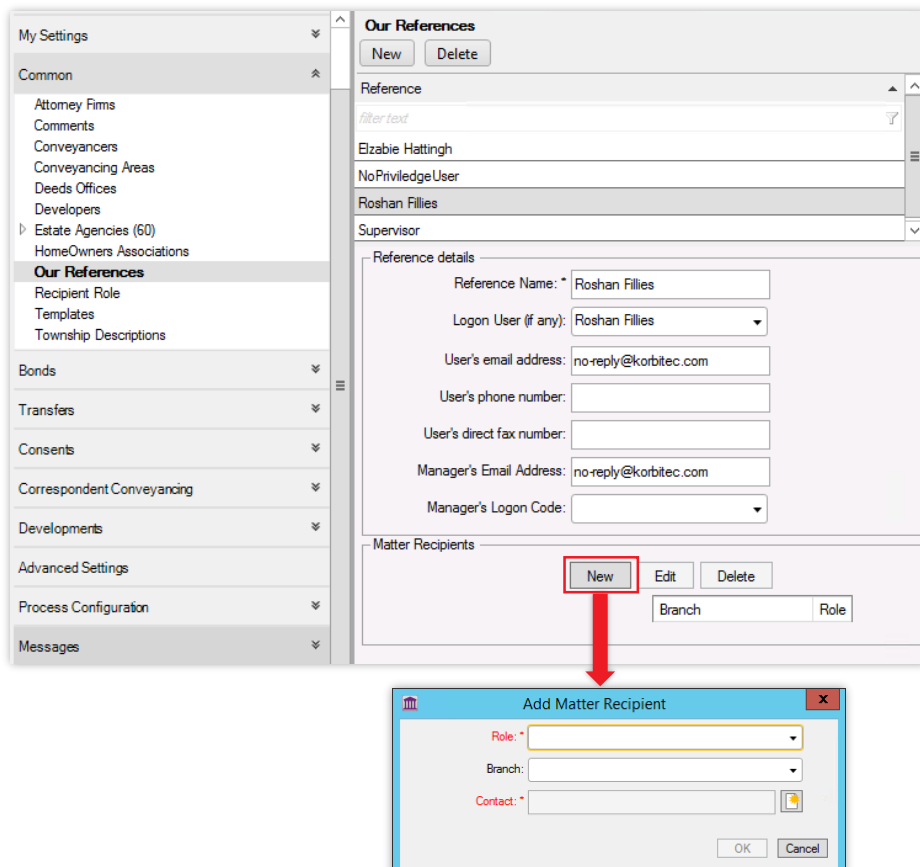


- To add new or additional agents, select the Estate Agency, click the **New** button and complete the required information in the **New Estate Agent** dialog box.

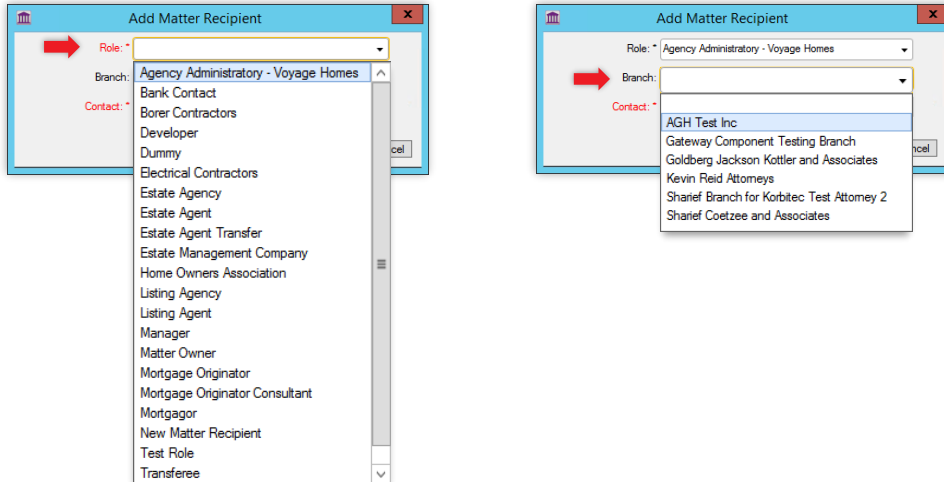
- The **Home Owners Associations** category is unchanged.



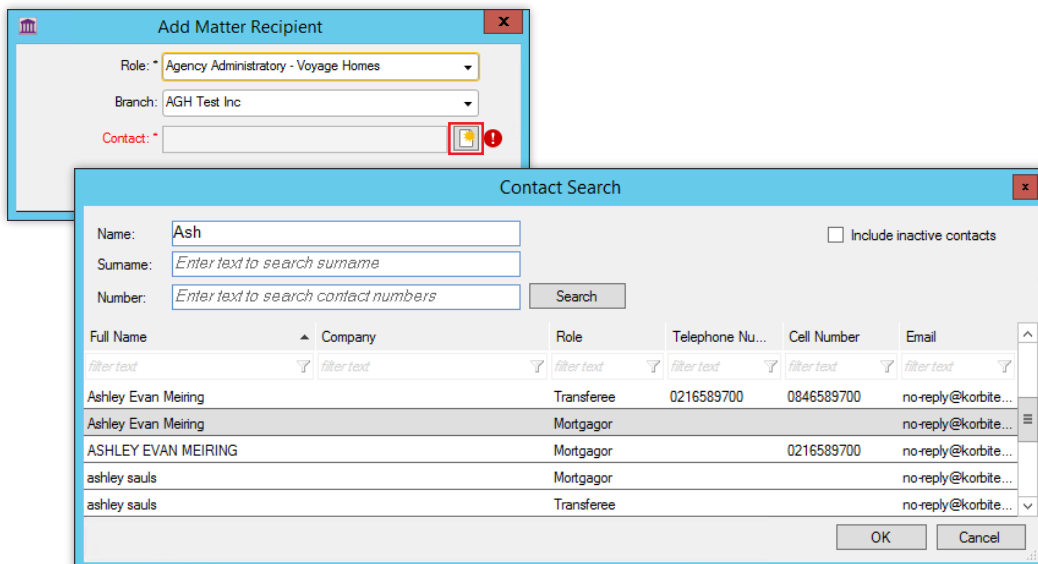
- The **Our References** category has a new **Matter Recipients** feature that enables you to assign a recipient / contact, such as a manager, marketing contact, etc. to a matter automatically when the matter is created. The roles list is made up of system shipped roles and custom roles created under **Common>Recipient Roles**.
 - To assign a **Matter Recipient** to an **Our Ref.**, click the **New** button



- Select the **Role** and **Branch** (if applicable) from the respective drop-down lists.

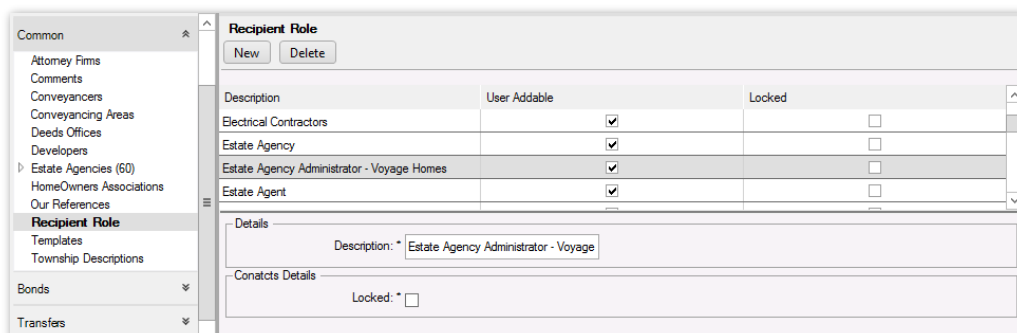


- Click the **New** icon at the end of the **Contact** field. This will open the **Contact Search** window. Search for and select the required contact and then click **OK**.



Full Name	Company	Role	Telephone Nu...	Cell Number	Email
Ashley Evan Meiring		Transferee	0216589700	0846589700	no-reply@korbite...
Ashley Evan Meiring		Mortgagor			no-reply@korbite...
ASHLEY EVAN MEIRING		Mortgagor		0216589700	no-reply@korbite...
ashley sauls		Mortgagor			no-reply@korbite...
ashley sauls		Transferee			no-reply@korbite...

- **Recipient Roles** is a new category that allows you to create custom contact roles for common stakeholders across different matters, such as the recipients of GhostConvey pipeline reports generated by the firm.
 - Add additional recipient roles by clicking the **New** button.



Description	User Addable	Locked
Electrical Contractors	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Estate Agency	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Estate Agency Administrator - Voyage Homes	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Estate Agent	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Details

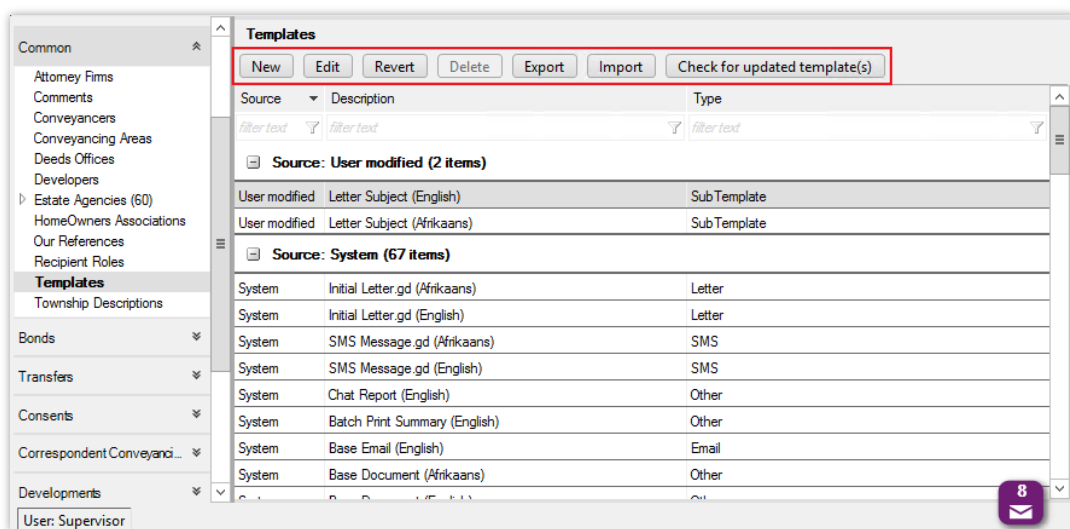
Description: * Estate Agency Administrator - Voyage

Contacts Details

Locked: * ☐

Templates

- The **Templates** section is where the system templates used for reports, email and letters are stored. System templates can be *modified*. Modified system templates are automatically saved as *user templates*.
 - If a user template is created, you can switch to the system template by clicking the **Revert** button on the toolbar.
 - The **Import / Export** buttons allow you to save templates to your local PC for customisation and thereafter import the modified templates into the **Setup>Templates** section.
 - The system templates are maintained by our document assembly team (KODA). When the templates are updated, GhostConvey will automatically check for updates. To manually check you can click the **Check for updated template(s)** button.

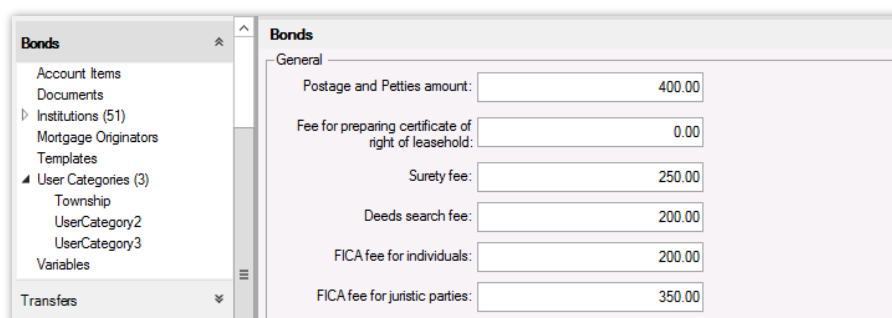


Note: It is strongly recommended that only users with the required permission and training attempt to modify the templates. If you are unsure of how to make the desired changes, please contact our Support Team for assistance.

Bonds

The following frequently used functions relating to Bonds are managed under this menu:

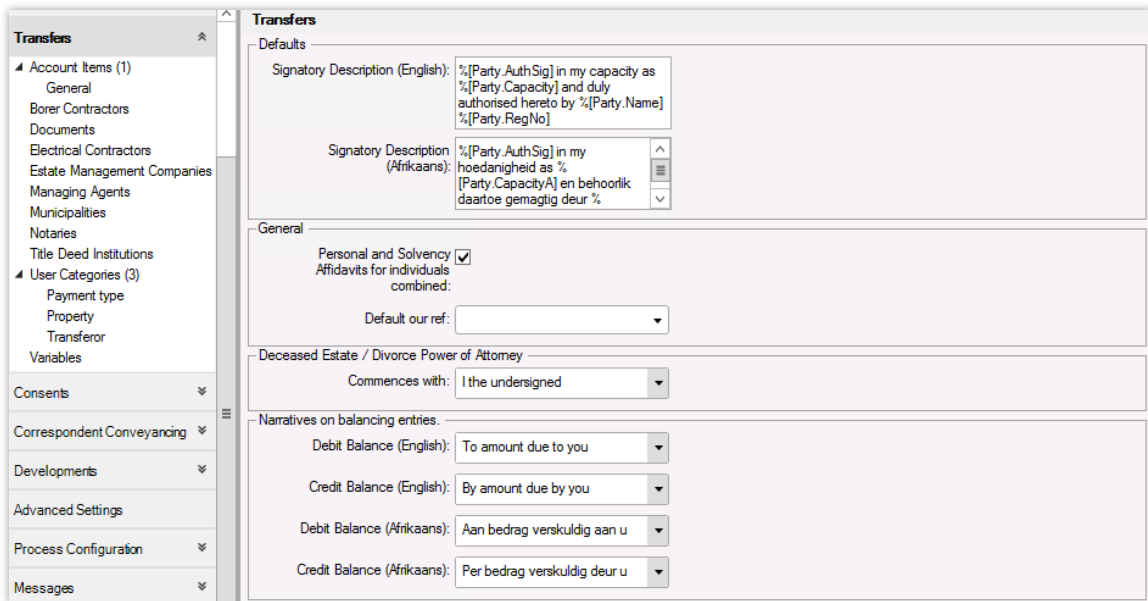
- Generic account items such as postage and petties, FICA fees, Deeds Search fees etc.
- Account items and relevant narratives on the accounts for fees and disbursements. Includes both system and user account items.
- Documents
- Enabling / adding of institutions and branches of institutions
- Management of bond originators



Transfers

The following frequently used functions relating to Transfers are managed under this menu:

- Generic account items such as postage and petties, FICA fees, Deeds Search fees etc.
- Account items and relevant narratives on the accounts for fees and disbursements. Includes both system and user account items.
- Service providers such as borer contractors and electricians
- Estate management companies, managing agents and municipalities
- Notaries
- Title deed institutions for cancellation requests



The screenshot shows the LexisNexis interface for the 'Transfers' menu. On the left is a sidebar with the 'Transfers' menu expanded, showing sub-items like 'Account Items (1)', 'User Categories (3)', 'Consents', 'Correspondent Conveyancing', 'Developments', 'Advanced Settings', 'Process Configuration', and 'Messages'. The main area displays the 'Transfers' configuration page with several sections:

- Defaults:** Contains 'Signatory Description (English):' and 'Signatory Description (Afrikaans):' fields with dropdown menus for selecting templates.
- General:** Includes a 'Personal and Solvency Affidavits for individuals combined:' checkbox (checked), a 'Default our ref:' dropdown, and a 'Deceased Estate / Divorce Power of Attorney' section with a 'Commences with:' dropdown.
- Narratives on balancing entries:** Contains four dropdown menus for 'Debit Balance (English)', 'Credit Balance (English)', 'Debit Balance (Afrikaans)', and 'Credit Balance (Afrikaans)'.