

GhostConvey v16.3.2

Release Notes

2017/11/07

TABLE OF CONTENTS

GENERAL	2
Reschedule All Milestones	2
Clear Milestones	3
Estimated Registration Date	4
BCC Email Addresses	4
Matter Comments.....	5
Show / Hide System Comments.....	5
Correspondent Module.....	5
Email Subject lines on Correspondent Milestone Process	5
LexisNexis Branding	6
Logon Screen.....	6
Splash Screen	6
Banner	6
BONDS.....	7
Reports.....	7
Standard Bank Progress Report	7
Absa Free Format Report.....	8
Absa Customer Contact Details (MT71).....	8
FNB LCS KODA Documents	8
FNB Home Loans Disclosure Document	9
Leasehold Bond over a Sectional Title Property	9
Nedbank: FATCA Reference	10
Mercantile Documents	10
Attorney Lists changes.....	10
New KODA document - FNB HF: Credit Life Insurance Waiver.....	10
General Maintenance	10

GENERAL

Reschedule All Milestones

All milestones for a specific matter can be rescheduled.

On the “Milestone Panel”, right-click and select “Reschedule all milestones for this matter”.

Milestone	Due
Confirmation of Receipt	14 Jul 17
Seller Contacted	14 Jul 17
Purchaser Contacted	14 Jul 17
Run milestone(s)	
Title	17 Jul 17
Initial	Reschedule selected milestone(s)
Cancel	Reschedule all milestones for this matter
Title	Add notification
Docu	Remove optional milestone(s)
Draft	Clear milestone

Specify the new due date of the earliest milestone and provide a reason for rescheduling.

The new due date can be set to any future date including weekends and public holidays.

Reschedule all milestones

Date when earliest milestone is due: * 2017/10/06

Reason: * Purchaser out of the country

Public: ☐

All milestones will become due 84 days later, except if it falls on a weekend.

OK Cancel

The due dates for the subsequent milestones are moved a certain number of days forward, which is calculated by the difference in days between the earliest due date and the new due date, including weekends and public holidays.

Confirmation of Receipt	6 Oct 17
✓ Estimated Registration Date	
Seller Contacted	6 Oct 17
Purchaser Contacted	6 Oct 17
Status Documents Received	
Title Deed Requested	9 Oct 17
Title Deed Received	17 Oct 17
Rates Figures Requested	

Clear Milestones

Milestones that have been actioned in error can be cleared (“unticked”).

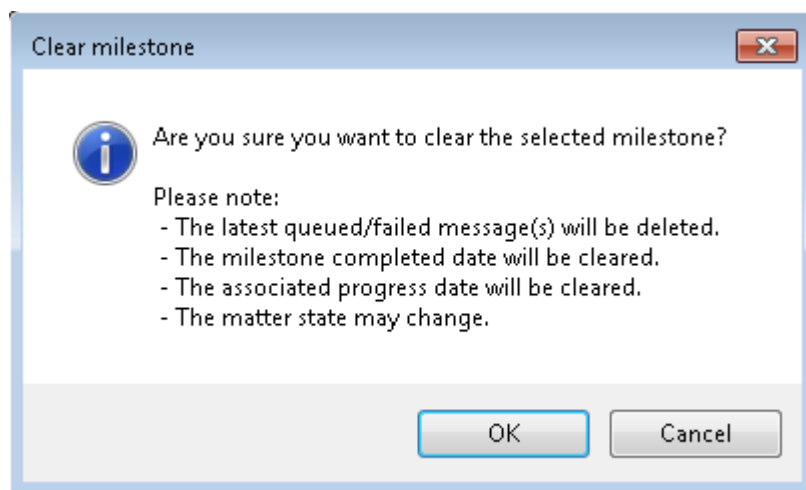
On the “Milestones Pane” right-click on the Milestone and select to “Clear milestone”.

If an electronic message was successfully sent, the milestone cannot be cleared.

When a milestone is cleared:

- The milestone completed date is cleared
- Any queued / unsent messages are deleted
- The “green ticks” are removed
- Any associated progress dates are cleared
- Matter history is updated
- If the milestone being cleared changes the state of the matter, the matter state will be reverted to the previous matter state.

Milestone	Due
✓ Confirm (P...	28 Aug 17
✓ Estimate Run milestone(s)	
✓ Seller Co Reschedule selected milestone(s)	28 Aug 17
✓ Purchas Reschedule all milestones for this matter	28 Aug 17
✓ Status D Add notification	
✓ Title De Remove optional milestone(s)	29 Aug 17
✓ Title De Clear milestone	6 Sep 17
Rates Fi Copy text	



Milestone	Due
➔ Title Deed Received	6 Sep 17

2017/10/05 06:16:27 PM Supervisor
Milestone [Title Deed Received] cleared.

Estimated Registration Date

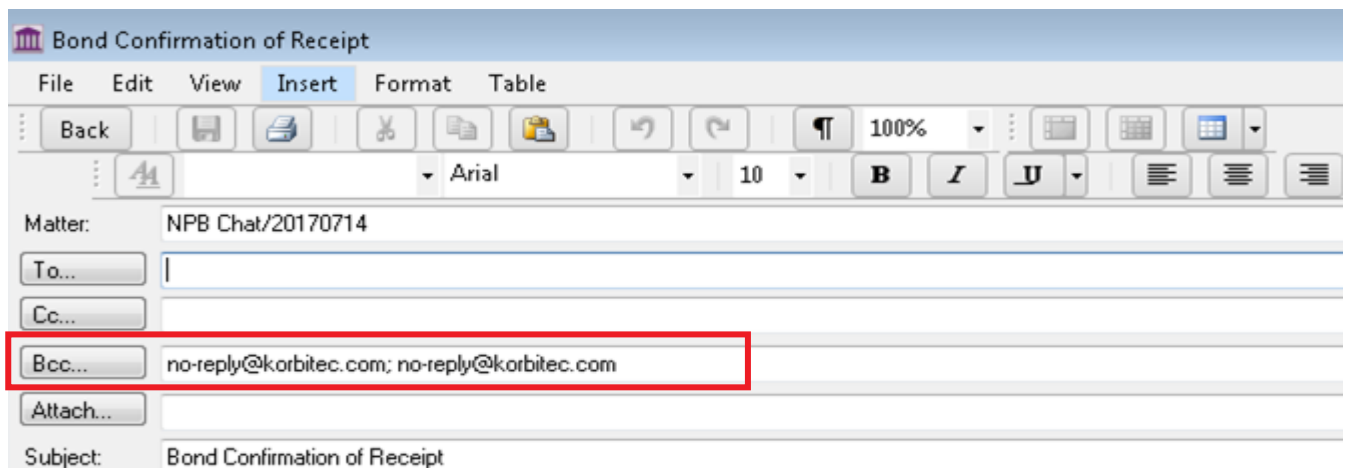
Estimated Registration Date displayed below “Days Since Instruction” on the Milestone Summary.

The ERD in the summary tab is read-only, for information purposes only. The ERD milestone can still be actioned from the Milestone pane or the preliminaries group.

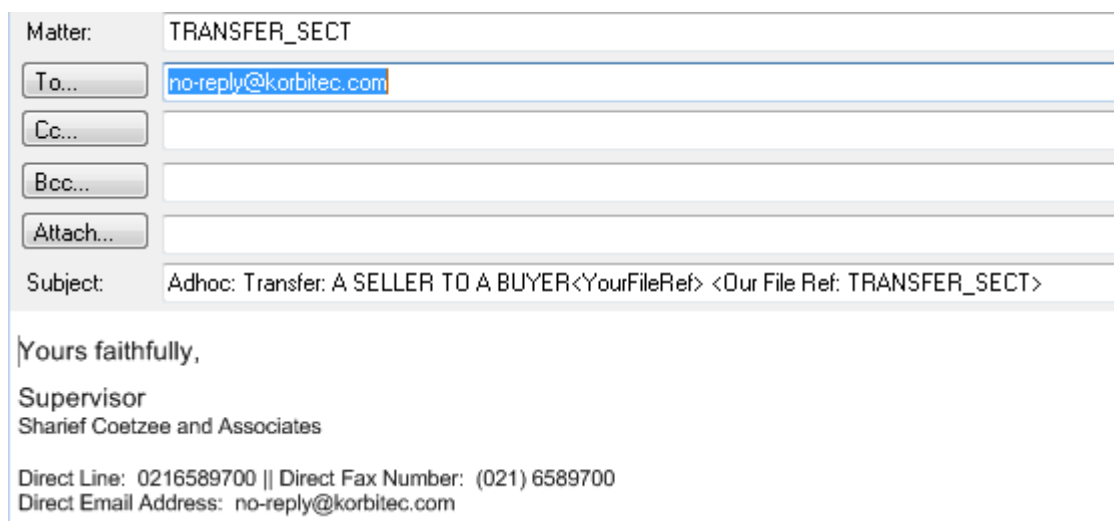


BCC Email Addresses

For all emails sent from GhostConvey, all the recipients are BCC'd by default. Email addresses will no longer appear in the To field by default:



The BCC field has been added to the adhoc email dialog:



Matter Comments

Show / Hide System Comments

Option to “Show system comments” available on the Matter Comments tab, which is unticked by default.

If “Show system comments” check box is not ticked, the “rescheduled” matter comments will be hidden and only the manually captured comments are displayed:

Matter Comments				
New	<input type="checkbox"/> Show system comments?			
Public	Comment	Date Added	User	Milestone
<input type="checkbox"/>	<i>filter text</i>	<i>filter text</i>	<i>filter text</i>	<i>filter text</i>
<input type="checkbox"/>	Requested clearance certificate.	2017/09/05 04:54:22 PM	Supervisor	
<input checked="" type="checkbox"/>	Client out of country	2017/08/28 01:55:19 PM	Supervisor	

If the “Show system comments” check box is ticked, all the comments, including rescheduled comments will be displayed:

Matter Comments				
New	<input checked="" type="checkbox"/> Show system comments?			
Public	Comment	Date Added	User	Milestone
<input type="checkbox"/>	<i>filter text</i>	<i>filter text</i>	<i>filter text</i>	<i>filter text</i>
<input type="checkbox"/>	All milestones rescheduled to 21 days later. Reason: Purch...	2017/10/05 06:02:11 PM	Supervisor	
<input type="checkbox"/>	Milestone Purchaser Signed Documents rescheduled from ...	2017/10/05 06:01:33 PM	Supervisor	Purchaser Signed Documents
<input type="checkbox"/>	Requested clearance certificate.	2017/09/05 04:54:22 PM	Supervisor	
<input type="checkbox"/>	Milestone Seller Signed Documents rescheduled from 12 S...	2017/09/05 04:53:01 PM	Supervisor	Seller Signed Documents
<input type="checkbox"/>	Milestone Seller Contacted rescheduled from 28 Aug 17 to ...	2017/08/31 01:55:27 PM	Supervisor	Seller Contacted
<input checked="" type="checkbox"/>	Client out of country	2017/08/28 01:55:19 PM	Supervisor	

Correspondent Module

Email Subject lines on Correspondent Milestone Process

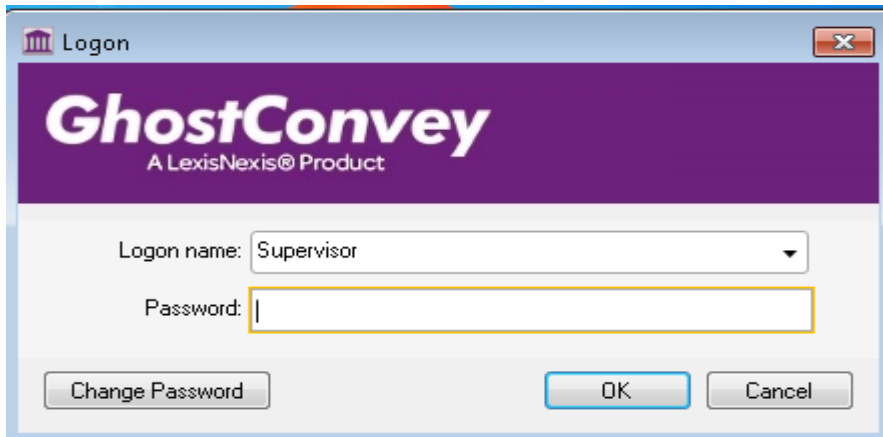
The email subject lines on the Correspondent Milestone Process to be built up as follows:

[Milestone Subject]: [Matter Sub Type]: [Parties] <Your File Ref: [Instructing File Reference]> <Our File Ref: [Our Reference]>

LexisNexis Branding

Korbitec references replaced by LexisNexis, and GhostConvey logo updated with LexisNexis endorsed logo.

Logon Screen

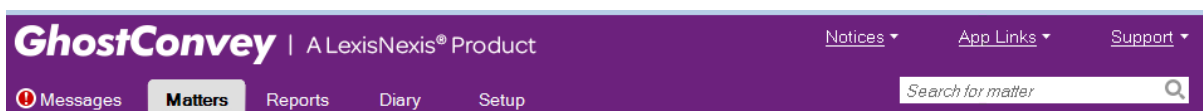


The logon screen is a window titled "Logon" with a close button in the top right corner. It features the "GhostConvey" logo and the text "A LexisNexis® Product" on a purple background. Below this, there is a "Logon name:" label with a dropdown menu showing "Supervisor" and a "Password:" label with an empty text field. At the bottom, there are three buttons: "Change Password", "OK", and "Cancel".

Splash Screen



Banner



BONDS

Reports

Standard Bank Progress report and Absa free format report was added specifically to assist with scorecard analysis.

Standard Bank Progress Report

A new bond report “Standard Bank Progress Report”:

The screenshot shows a 'Report List' window with a toolbar containing buttons: Run report, Delete, Import, Export, Schedule, Classic Reports (dropdown), and Except. Below the toolbar is a table with columns: Description, Type, and Matter Type. The table contains one entry: 'standard bank progress report' with a filter icon, 'filter text', and 'filter text'. Below the table is a section titled 'Bond (1 item)' with a minus icon. Under this section, there is a table with two rows: 'Standard Bank Progress Report' and 'Standard Bank Progress Report', both with 'GhostConvey' in the Type column and 'Bond' in the Matter Type column.

The following parameters apply:

- Date Received From (defaulted to first of the current month)
- Date Received To (defaulted to current date)

The screenshot shows a dialog box titled 'Standard Bank Progress Report Parameters'. It has two date input fields: 'Date Received From:' with the value '2017/10/01' and 'Date Received To:' with the value '2017/10/05'. Both fields have a calendar icon to their right. At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

Default columns:

- Loan Account Number
- Sort Name
- Short Property Description
- Classification
- Bond Value
- Date Received
- ERD
- Date Lodged
- Last Progress Report
- Last Progress Report Date

- Delay Reason
- Delay Reason Date
- Date Registered
- Matter State

The report is applicable to electronic Standard Bank Bonds only, and excludes archived, NTU'd and cancelled matters.

Loan Ac...	Sort Name	Short Property Description	Bond Classific...	Registered ...	Date Received	Esti...	Date Lo...	Last Progr...	Last Progres...	Delay Reason	Delay Reaso...	Date Registe...	Matter Sta
61447385001	MAKHANYA	Stand No 10584 UMHLATHUZI ...		323087.91	2014/05/13								Instruction Ak
61447385001	MAKHANYA	Stand No 10503 UMHLATHUZI ...		325902.16	2014/05/09								Accepted
61447385001	MAKHANYA	Stand No 10503 UMHLATHUZI ...		325902.16	2014/04/14								Documents si
61447385001	MAKHANYA	Stand No 10503 UMHLATHUZI ...		325902.16	2014/04/04								Amendment A
61447385001	MAKHANYA	Stand No 10503 UMHLATHUZI ...		325902.16	2014/04/04								Amendment A
61447385001	MAKHANYA	Stand No 10503 UMHLATHUZI ... DEVELOPMENT		325902.16	2014/04/02								Registered
366881119	NGWENYA	PORTION 87 OF ERF 1316 UNIL...		326000	2014/04/01								Instruction Ak

Absa Free Format Report

Absa Limited Free Format Report includes “**Matter State**” column.

Report List: ABSA Limited Free Format Report									
Refresh	Customise...	Save As...	Export to Excel	Preview	Save Current Report Config	Save As Base Report			
Date Received	Estimated D...	Loan Account N...	Bond Classification	File Reference	Our Reference	Sort Name	Short Property Description	Matter State	Free Format Message Text
2017/08/25	2017/09/25	7163324621		716332462100100010004	KarenB	BENKENSTEIN	Unit 1 SS UITZICHT, Unit 7 SS UITZICHT	Accepted	
2017/07/19	2017/08/17	7106188738		ABS_IND_CONV	KarenB	[LAST NAME]	Unit 1 SS UITZICHT, Unit 7 SS UITZICHT	Guarantees issued	

Absa Customer Contact Details (MT71)

Update to the Absa Limited **Customer Contact Details (MT71)**. Changes include:

- If “Home phone” captured, “Dialing code” is required
- If “Work phone” captured, “Dialing code” is required
- “Default delivery notice” is a new required field
- “Future residential address” new optional field
- “Future postal address” new optional field
- NB: Address line 4 is an optional field for all addresses. The “Postal Town” should be captured in this field.

FNB LCS KODA Documents

The following FNB LCS documents are available as KODA documents:

- Bond Conventional
- General Notarial Covering Bond
- Special Notarial Covering Bond
- Power of Attorney Conventional

- Power of Attorney Sectional
- Power of Attorney General Notarial Bond
- Power of Attorney Notarial Bond
- Power of Attorney Special Notarial Bond

FNB Home Loans Disclosure Document

The FNB HL Insurance Disclosure to Section 106(5)(b) is available in the print list as per Attorney Circular 17/2017.

Leasehold Bond over a Sectional Title Property

Provision has been made for Leasehold Bonds over a Sectional Title Property. This was a request from First National Bank; the Waterfall Estate is a Leasehold property.

The following changes were implemented on the Bond Details tab for all bond institutions:

- “Bond Type” removed (Bond type included Conventional, Sectional and Leasehold)
- “Property Type” added
- “Leasehold certificate required” added

The “Property Type” field contains the following options:

- Conventional
- Sectional

The “Leasehold certificate required” field has the following options:

- Blank
- No Certificate required
- Certificate of Right of Leasehold
- Certificate of Ownership

Bond Details

Property type:

Leasehold certificate required:

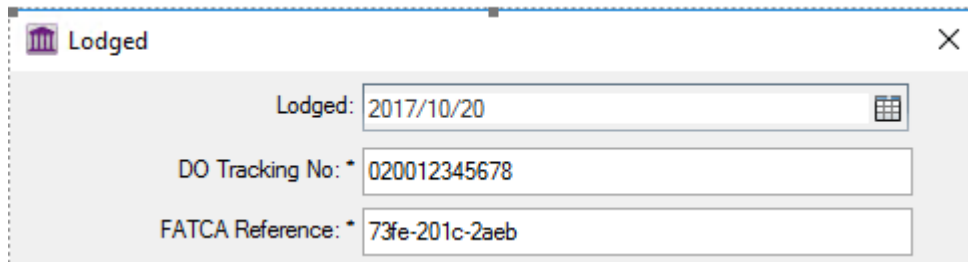
Debt type:

If “Leasehold certificate required” is blank (i.e. nothing has been selected), the bond is a freehold, not a Leasehold.

If any of the other options are selected, the bond is a leasehold.

Nedbank: FATCA Reference

FATCA reference is required on lodgement if “FATCA” is a document requirement in WebConvey.



Mercantile Documents

New Special Document Form 39b Resolution Passed By Entity As Shareholder added.

Attorney Lists changes

- Switch setup attorney list and estate agency control from a dropdown list to a filter control if more there are more than a 1000 items in the list.
- New list permissions in setup.

New KODA document

- FNB HF: Credit Life Insurance Waiver

General Maintenance

Issue Code	Description
GCDev-108460	Cancellation Request - Institution field not saving selected value
GCDev-108662	Attached Document duplicated in the Matter History is rectified
GCDev-108344	Quotation - Additional Account Items are populating correctly
GCDev-108875	Milestone Process : able to delete custom milestone from the Instruction group
GCDev-108614	Consents : “Obj Reference error” after importing endorsements - properties now import correctly
GCDev-107972	Bond MO report: the drop-down list shows MO's in alphabetical order
GCDev-108775	Estate Agent Email Address is now pulling through to Transfer Reports
GCDev-108617	Batch print summary: Feedback is now provided when documents are assembled

Issue Code	Description
GCDev-108231	Manual Correspondence matters: Instructing attorney correspondence recipient name defaults to "Instructing attorney"
GCDev-108780	Bond GhostFill Reports: Intermittent "Cannot create a row of size 8230 which is greater than the allowable maximum row size of 8060" error thrown
GCDev-108883	Matter cancelled report is now displaying any content
GCDev-108860	.NET reports: caters for linked matter comments (Bonds & Transfers)