

Lexis Convey v17.0

Release Notes

2018/07/02

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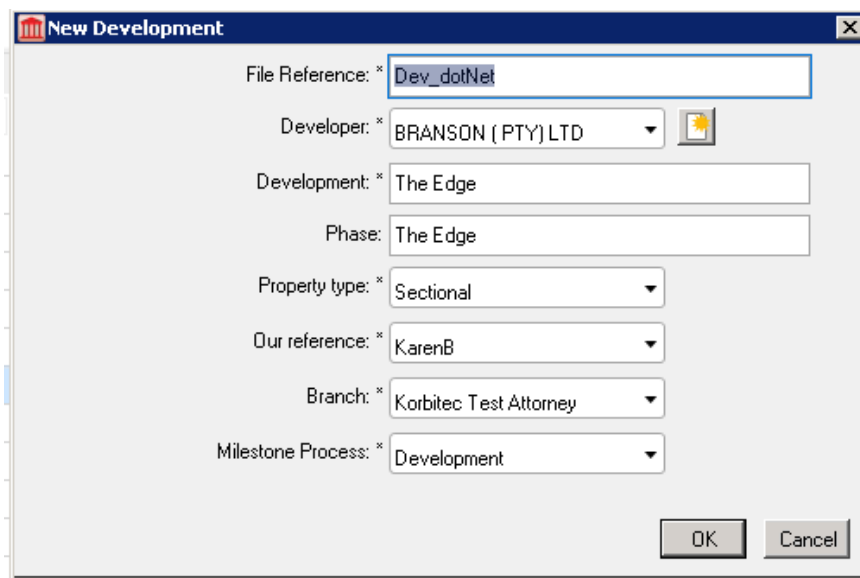
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Developments

The Developments module has been rewritten in line with the other matter types in Lexis Convey, providing access to features such as configurable milestone processes, milestone view, attached documents, matter history, etc. which were not previously available on a Development matter.

Milestone processes can now be configured for development matters. The applicable Milestone Process is then selected when the matter is created.

Select Milestone Process



New Development

File Reference: * Dev_dotNet

Developer: * BRANSON (PTY) LTD

Development: * The Edge

Phase: The Edge

Property type: * Sectional

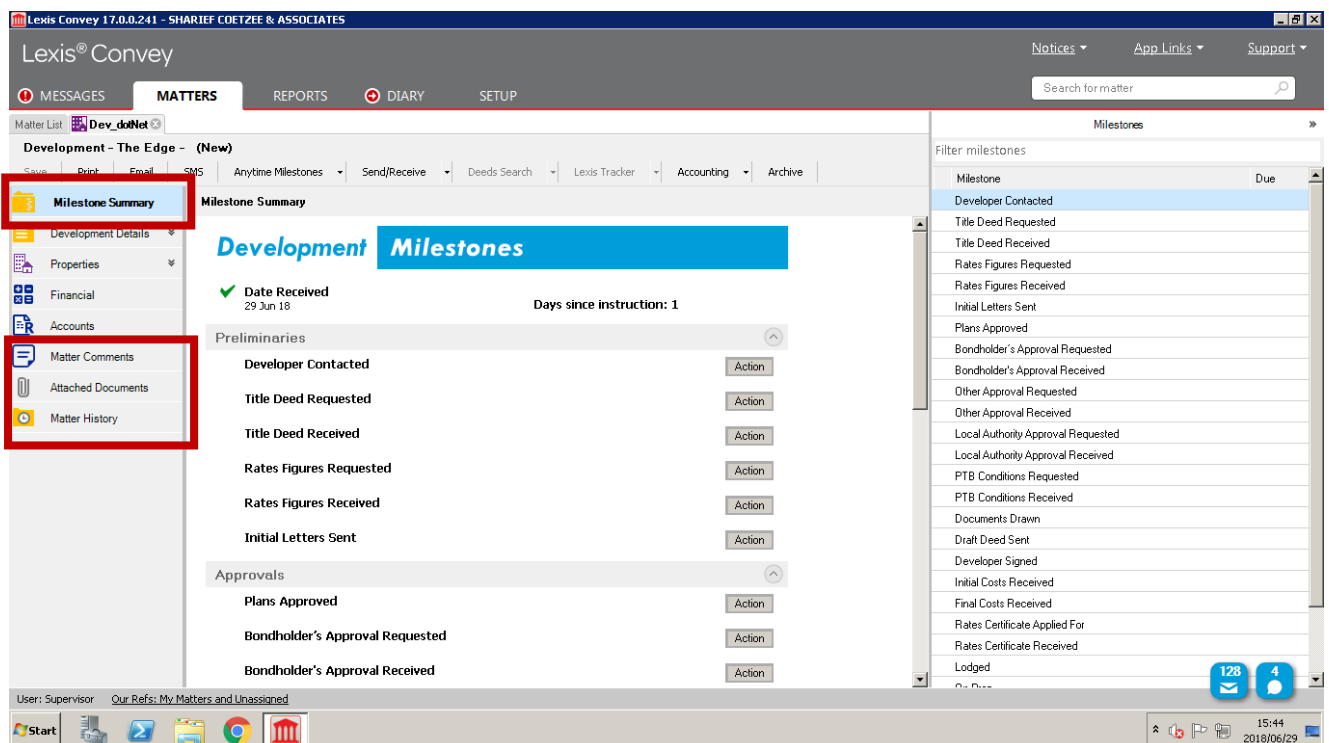
Our reference: * KarenB

Branch: * Korbitec Test Attorney

Milestone Process: * Development

OK Cancel

Milestone Summary



Lexis Convey 17.0.0.241 - SHARIEF COETZEE & ASSOCIATES

Lexis® Convey

MESSAGES MATTERS REPORTS DIARY SETUP

Search for matter

Matter List: Dev_dotNet

Development - The Edge - (New)

Save Print Email SMS Anytime Milestones Send/Receive Deeds Search Lexis Tracker Accounting Archive

Milestone Summary

Development Details Properties Financial Accounts

Matter Comments Attached Documents Matter History

Development Milestones

✓ Date Received 29 Jun 18 Days since instruction: 1

Preliminaries

- Developer Contacted Action
- Title Deed Requested Action
- Title Deed Received Action
- Rates Figures Requested Action
- Rates Figures Received Action
- Initial Letters Sent Action

Approvals

- Plans Approved Action
- Bondholder's Approval Requested Action
- Bondholder's Approval Received Action

Milestones

Filter milestones

Milestone	Due
Developer Contacted	
Title Deed Requested	
Title Deed Received	
Rates Figures Requested	
Rates Figures Received	
Initial Letters Sent	
Plans Approved	
Bondholder's Approval Requested	
Bondholder's Approval Received	
Other Approval Requested	
Other Approval Received	
Local Authority Approval Requested	
Local Authority Approval Received	
PTB Conditions Requested	
PTB Conditions Received	
Documents Drawn	
Draft Deed Sent	
Developer Signed	
Initial Costs Received	
Final Costs Received	
Rates Certificate Applied For	
Rates Certificate Received	
Lodged	
On-Plan	

User: Supervisor Our Refs: My Matters and Unassigned

128 4

15:44 2018/06/29

Development Details

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Lexis® Convey

MESSAGES MATTERS REPORTS DIARY SETUP

Search for matter

Matter List Dev_doNet KB_Transfer2

Development - The Edge - (New)

Save Print Email SMS Anytime Milestones Send/Receive Deeds Search Lexis Tracker Accounting Archive

Milestone Summary

Development Details

Correspondence

Applicant (1)
BRANSON (PTY) LTD

Properties

Sections
EUAs

Financial

Accounts

Matter Comments

Attached Documents

Matter History

Development Details

General

File reference: Dev_doNet

Development: The Edge

Phase: The Edge

Accounting reference:

Our reference: KarenB

Developer: BRANSON (PTY) LTD

Milestone process: Development

Our branch: Korbalec Test Attorney

Date received: 2018/06/29

Estimated registration date: 2018/07/01

Language: English

Property type: Sectional

Open register in Deeds Office?

Date register opened: 2018/07/01

Parent property

Short property description:

User: Supervisor Our Refs: Filtered

123

18:17
2018/07/01

Correspondence

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Lexis® Convey

MESSAGES MATTERS REPORTS DIARY SETUP

Search for matter

Matter List Dev_doNet KB_Transfer2

Development - The Edge - (New)

Save Print Email SMS Anytime Milestones Send/Receive Deeds Search Lexis Tracker Accounting Archive

Milestone Summary

Development Details

Correspondence

Applicant (2)
BRANSON (PTY) LTD
Dev Person

Properties

Sections
EUAs

Financial

Accounts

Matter Comments

Attached Documents

Matter History

Correspondence

Same as applicant? ☒

Correspondence reference:

Greeting:

Addressee: BRANSON (PTY) LTD

Address: 36 CHERRY AVENUE,
CLAREMONT,
7700

Phone (w): 021 685 5200

Phone (h): 021 685 2101

Fax: 0865191030

Cell: 0829781125

Email: no-reply@korbalec.com

Place signed by applicant: Cape Town

Date signed by applicant: 2018/07/01

Estate agent

Estate agency:

Estate agency reference:

Mortgage originator

User: Supervisor Our Refs: Filtered

123

18:49
2018/07/01

Applicants

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Lexis® Convey

MESSAGES MATTERS REPORTS DIARY SETUP

Matter List Dev_dotNet KB_Transfer2

Development - The Edge - (New)

Save Print Email SMS Anytime Milestones Send/Receive Deeds Search Lexis Tracker Accounting Archive

Milestone Summary

Development Details

Correspondence

Applicant (2)

BRANSON (PTY) LTD

Dev Person

Properties

Applicant

New Delete Move up Move down

Applicant Type	Name	Registration/ID
Company	BRANSON (PTY) LTD	2012/020587/25
Natural	Dev Person	

Properties

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Lexis® Convey

MESSAGES MATTERS REPORTS DIARY SETUP

Matter List Dev_dotNet KB_Transfer2

Development - The Edge - (New)

Save Print Email SMS Anytime Milestones Send/Receive Deeds Search Lexis Tracker Accounting Archive

Milestone Summary

Development Details

Properties

Sections

EUAs

Financial

Accounts

Matter Comments

Attached Documents

Matter History

Sections

New Delete Move up Move down

Number of Sections to add: 0 Starting at: 1 Add

Flat No	Extent	Tenant Name
1	68	
2	68	
3	68	
4	68	
5	68	
6	68	
7	68	

Extent: 68

Tenant name:

Tenant address: Flat 1 The Edge

Conditions: Add Edit Delete

Condition

Helen HomeOwner's Condition.tif

User: Supervisor Our Refs: Filtered

123

18:29 2018/07/01

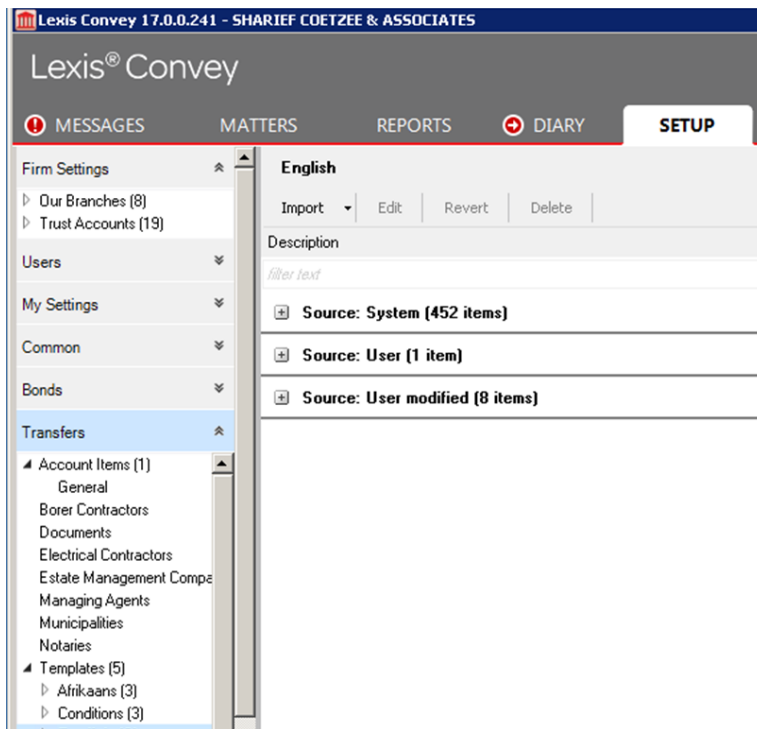
Templates in Database

Templates have been moved from the file system to the Lexis Convey database. These include all shipped system templates and user documents. The templates have been renamed in the current directory structure.

Setup

The templates are now accessed via Setup.

Each matter tab in setup has a “Templates” sub tab:



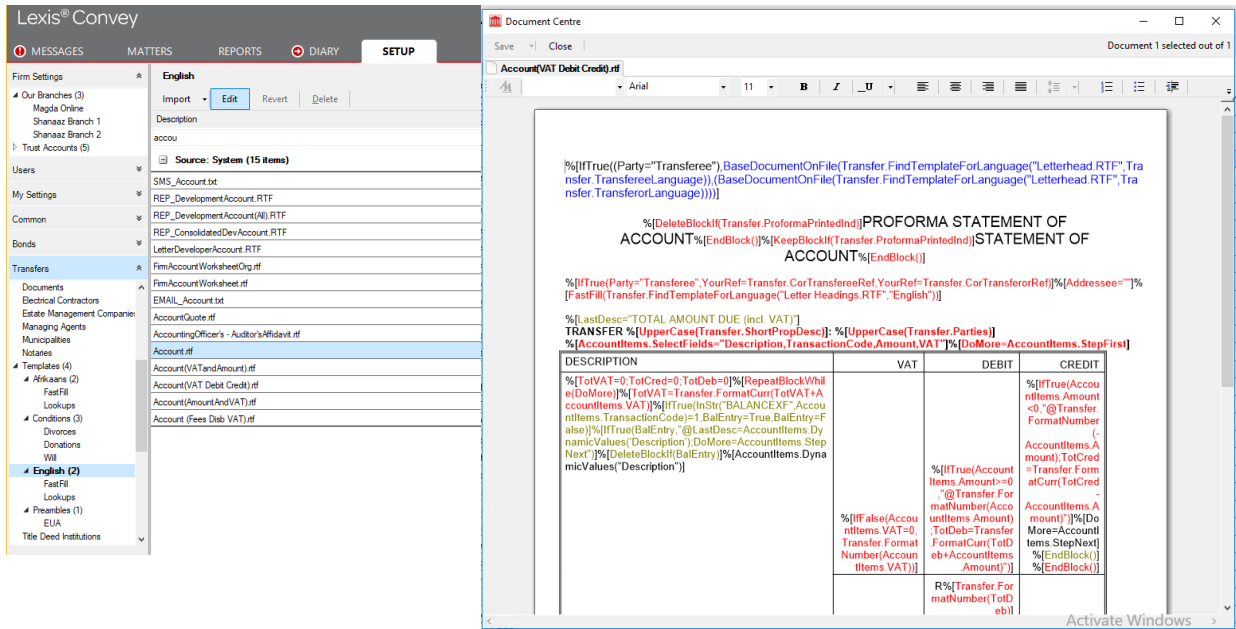
Source:

- System – Shipped documents
- User-modified – Edited shipped document
- User – User- created document

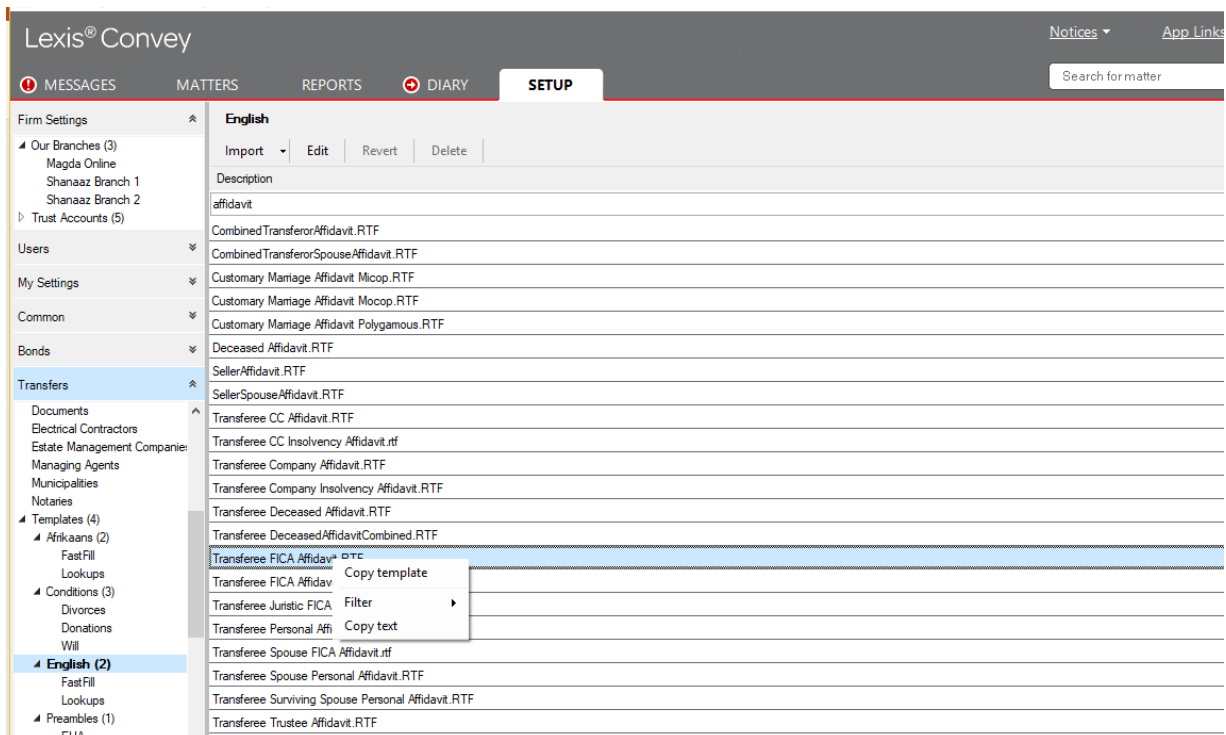
Customize

To edit a template, navigate to the template and select edit.

The document can be edited in MS Word, or Document Centre, if this is enabled (in the normal way):



Right click a template to copy:



Add new

To add a new template, select “Import” and choose one of the following options:

LexisConvey 17.0.0.274 - Padayas Attorney

Lexis® Convey

MESSAGES MATTERS REPORTS DIARY SETUP

Bonds

- Account Items
- Documents
- Institutions (51)
- Mortgage Originators
- Templates (37)
 - Bond (BND) (2)
 - English (BNDE)
 - Afrikaans (BND)
 - ABSA Bank Limited (2)
 - ABSA Commercial Prope
 - Afgri Operations Ltd (2)
 - Albaraka Bank Limited (
 - Beech Finance Limited (
 - Blue Strata Trading (Pty)
 - BoE Private Bank (1)
 - Business Partners Limite
 - Cullinan Holdings Limitec
 - Eskom Finance Compan
 - FirstRand Bank Limited (

English

Import Edit Revert Delete

- Import new
- Import over existing
- Copy from existing

15B(3)C AFFIDAVIT.RTF

42(2) Cert.RTF

Account(AmountAndVAT).rtf

Account(VAT Debit Credit).rtf

Account(VATandAmount).rtf

Account.rtf

AccountingOfficer's - Auditor'sAffidavit.rtf

AccountQuote.rtf

AffidavittoSection9(20).rtf

AffidavittoSection9(20)Spouse.rtf

Upload a new user document

Replace a template with a new

Copy a template from another

Add to Print list

Group	Item	Count
USR	USER	123
USR	REPORTS	
USR	ELEC	
USR	USER	
USR	Karen's User Group	
USR	REPORTS	
USR	REPORTS	
USR	Karen's User Group	
USR	LODGE	

Group: Lodgement 1200

Sequence:

Description: *

Criteria:

Setup command:

Language:

Number of copies:

Item name:

Collection name:

Document code (excluding .rtf):

15B(3)C AFFIDAVIT
AffidavitEndingTransferee
AffidavitEndingTransferor
AffidavittoSection9(20)
AffidavittoSection9(20)Spouse
affidavits
All seller affidavits
buyer specific affidavit
Customary Marriage Affidavit Micop
Customary Marriage Affidavit Mocop
Customary Marriage Affidavit Polygamous
Deceased Affidavit
Seller specific affidavit
Transferee CC Affidavit
Transferee CC Insolvency Affidavit
Transferee Company Affidavit
Transferee Company Insolvency Affidavit
Transferee Customary Marriage Affidavit
Transferee Deceased Affidavit
Transferee FICA Affidavit

aff

Navigate to the “Documents” sub-tab to configure the print list details for a template.

Title Deed Conditions

Functionality has been added to copy a condition, as well as to import a new condition, and import over an existing template.

The screenshot displays the LexisConvey web application interface. At the top, there is a navigation bar with tabs for MESSAGES, MATTERS, REPORTS, DIARY, and SETUP. Below this, a header bar shows the current matter: "AG 20110729064549976". The main content area is titled "Transfer - SOUTHERN STORM PROP 223 C C i.f.o. A B S A BANK LTD - Transfer (Accepted)". A sidebar on the left contains a tree view with categories like Milestone Summary, Transfer Details, Correspondence, Transferees, Signing Details, Properties, SAC'S CENTRE, Sections, Exclusive Use Areas, Property Descriptions, Financial, SARS, and Additional Documents. The main panel shows the "Deed Conditions" section, with a list of available conditions. A modal dialog box is open, titled "Copy template to: Conditions folder", with a text input field containing "Copy: SAMPLE HomeOwner's Condition" and an "OK" button. Below the dialog, there are buttons for "Add", "Remove", and "Up".

Absa Branding

Absa Logo

Interface updated to reflect the new Absa logo where applicable.

Document Maintenance

FNB CPF

Resolutions & Cessions - Fields for Authorised Signatories and Directors/Members/Trustees added

Technical Maintenance

Installer Updates

Applied the Lexis Convey branding changes to the installer.

TLS 1.2

Support for TLS 1.2 to prevent security risks associated with TLS 1.1 and lower.

Accounting Link

Post Activities: Fixed an issue where not all the milestone dates were being sent through to the accounting software.

FNB Home Loans Consents and Cancellation Requests

Use Gateway List Service to retrieve Document Names for documentFromAttorney messages for a FNB HL Cancellation request and Consent.

Maintenance

Issue Code	Description
GCDDev-110680	Bond View duplicates Bond matters in list when executed – fixed
GCDDev-110566	Matter Party Report does not display Cell Number – updated
GCDDev-110548	Transfers: Listing Agent does not appear in list when sending Adhoc SMS – done
GCDDev-110476	Transfers: Correspondence Tab – “Institution holding title deeds” included Consents list of Financial Institutions – fixed
GCDDev-110469	Matters Cancelled Chart includes Bonds where "Withdrawn from Deeds Office" has been ticked - fixed
GCDDev-110579	Transfers: Clause 3 is not pulling though correctly on the Conveyancer certificates 15B(3) when a Limpopo Deeds office is selected - fixed
GCDDev-105109	Deceased Sale transfers: where spouses were MICOP, "Estate Late" is pre-pended to surviving spouse name on SARS tab - amended
CAT-99804	Section 45(1) Application display incorrect Transferor/Surviving Spouse description - amended
CAT-110446	Matters Registered Report - Add Estate Agent column - fixed