

# Lexis Convey v17.2.4

## Release Notes

2020/02/28

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## Accounts

Accounts: In matter Accounts tab

Lexis Convey has improved the usability and functionality of the Accounts offering across the product. Setting up Accounts has become more intuitive and efficient. A uniform approach was applied to all Accounts inside the various matter types to ensure simplicity and a more intuitive user experience.

The user interface for the Accounts will have a Tool bar with various button options, an account summary section, an account line items grid and the details of the account line item selected.

The Accounts will be populated by the appropriate account line items by evaluating the matter data criteria from the account's setup.

Below is an example of the Bonds > Accounts tab:

The screenshot shows the 'Accounts' interface. At the top, there is a toolbar with buttons: New, Delete, Move up, Move down, Update Account, Reset to Default, Hide, and Discount. Below the toolbar, there is a 'Trust account:' dropdown menu and a 'BEE discount applies:' checkbox. To the right, there are two input fields: 'Total Amount (Excl. VAT):' with the value 9712.10 and 'Total VAT:' with the value 1213.50.

Narration	Amount	VAT	Total	Balance
To Deeds Office Search Fee	150.00	22.50	172.50	172.50
To Initiation fee	199.50	0.00	199.50	372.00
To Valuation fee	615.60	0.00	615.60	987.60
To Deeds Office Fee	507.00	0.00	507.00	1 494.60
To postages, petties and telephone	200.00	30.00	230.00	1 724.60
To our fees for taking instruction, drawing Power of Attorney t...	7 740.00	1 161.00	8 901.00	10 625.60
Electronic Document Generation Fee	300.00	0.00	300.00	10 925.60

Below the table is a 'Details' panel for the selected item 'To postages, petties and telephone'. It includes fields for 'Narration', 'Nature' (set to 'Fee'), 'Narrative for VAT-only entry (if required)', 'Amount (excl. VAT):' (200.00), 'Vatable:' (checked), 'VAT Amount:' (30.00), and 'Amount (Incl. VAT):' (230.00).

### Tool bar buttons:

- *New:*

Clicking on the new button will add an additional or ad hoc item to the account.

This close-up shows the 'Accounts' toolbar. The 'New' button is highlighted in blue. Below the toolbar, there is a dropdown menu with the text 'Add an additional or ad hoc item to the account.' and a 'Total Amount (Excl. VAT):' input field.

The user will have the option to add and create a completely new custom account item "on the fly" OR add from the selection of account items that are populated from Setup that were marked as "Ad hoc account item?".

A [New account item] line item will be added to the bottom of the account.

New additional custom account item:

**Accounts**

New | Delete | Move up | Move down | Update Account | Reset to Default | Hide | Discount

Trust account:  Total Amount (Excl. VAT):

BEE discount applies:  Total VAT:

Narration	Amount	VAT	Total	Balance
Sectional property	10.00	0.00	10.00	10.00
To postages, petties and telephone	200.00	30.00	230.00	240.00
To Deeds Office Fee	889.00	0.00	889.00	1 129.00
To Deeds Office Search Fee	120.00	18.00	138.00	1 267.00
To Electronic Document Generation Fee	55.00	8.25	63.25	1 330.25
[New account item]	0.00	0.00	0.00	1 330.25

**Details**

Description:

Amount (excl. VAT):

Narration:

Vatable:

Nature:

VAT Amount:

Narrative for VAT-only entry (if required):

Amount (Incl. VAT):

Complete the necessary data for the new account item:

**Accounts**

New | Delete | Move up | Move down | Update Account | Reset to Default | Hide | Discount

Trust account:  Total Amount (Excl. VAT):

BEE discount applies:  Total VAT:

Narration	Amount	VAT	Total	Balance
Sectional property	10.00	0.00	10.00	10.00
To postages, petties and telephone	200.00	30.00	230.00	240.00
To Deeds Office Fee	889.00	0.00	889.00	1 129.00
To Deeds Office Search Fee	120.00	18.00	138.00	1 267.00
To Electronic Document Generation Fee	55.00	8.25	63.25	1 330.25
[Custom Account Item]	0.00	0.00	0.00	1 330.25

**Details**

Description:

Amount (excl. VAT):

Narration:

Vatable:

Nature:

VAT Amount:

Narrative for VAT-only entry (if required):

Amount (Incl. VAT):

The predefined Ad hoc account items created in Setup can be selected by clicking on the Description dropdown. The information icon will indicate that more items can be added to the list by marking them as “ad hoc” in Setup.

Select Ad hoc account item in Setup:

The Insurance Certificate Fee will now be available in the list of new account items to add. All relevant data will be pulled to the account item from Setup.

- *Delete:*

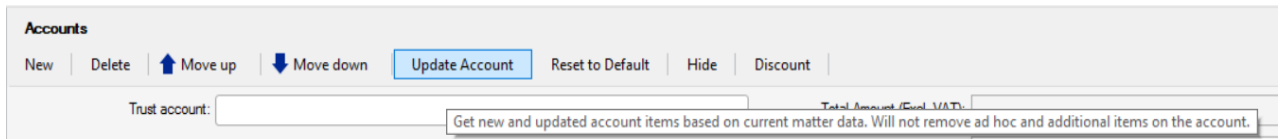
Clicking the Delete will remove one or more selected account items.

- *Move up/Move down:*

The account is initially generated with account line items in the order they were captured in Setup. Clicking on Move up or Move down will reorder the sequence of accounting items.

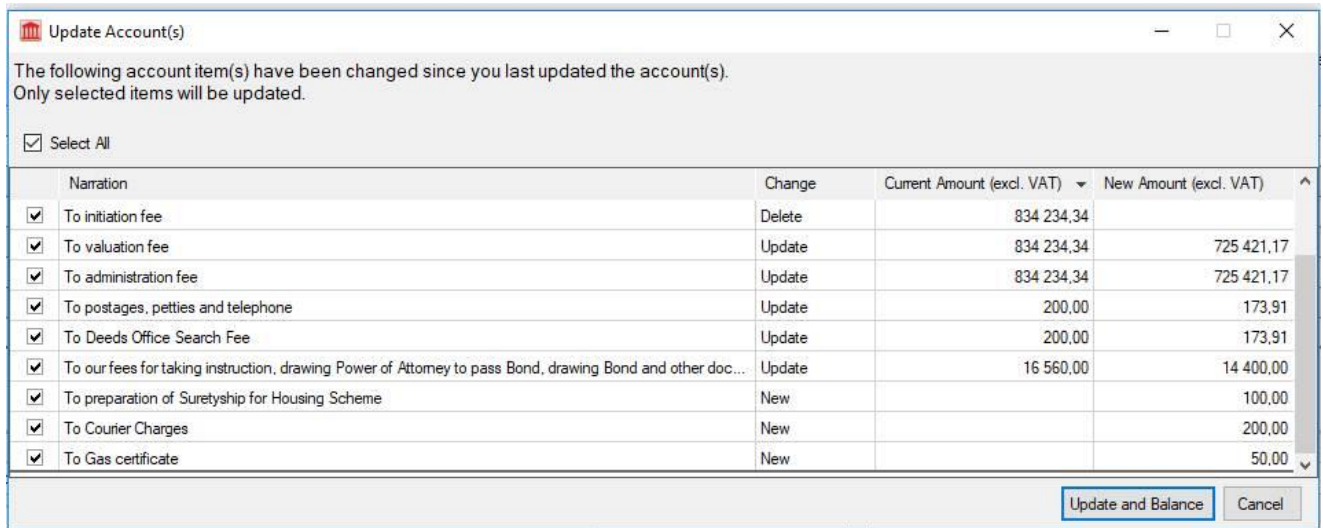
- *Update Account:*

Clicking on Update Account will get new and updated account items based on current matter data. It will not remove ad hoc and additional items on the account.

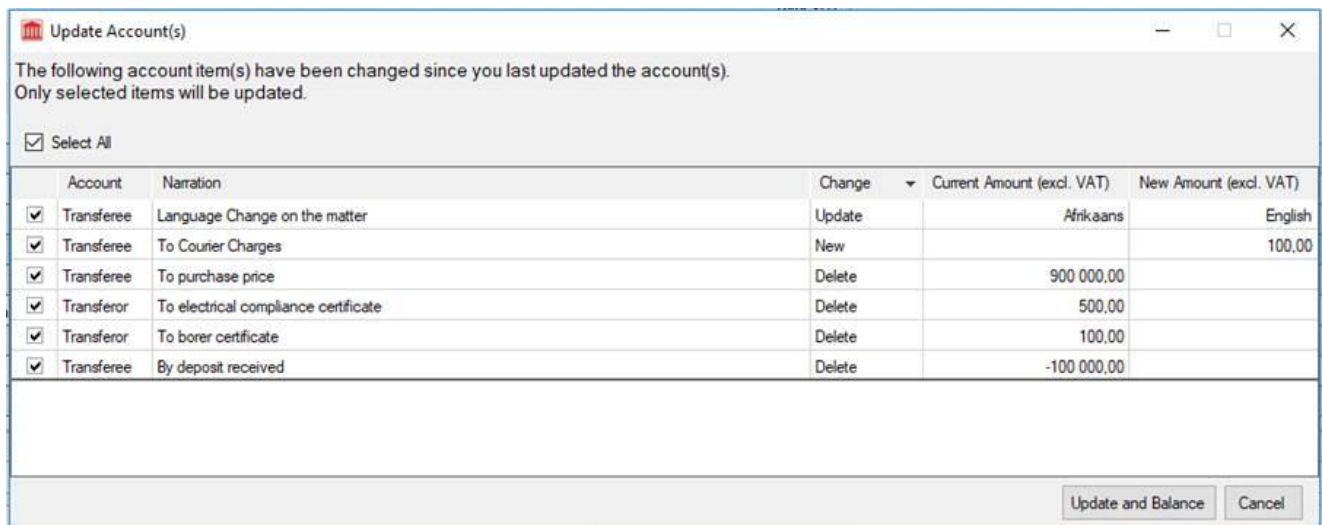


Lexis Convey will perform this function when the Accounts tab is opened to ensure the account is always up to date with the latest data. Updating the account will check if any new items can be added to the account from setup, update any amounts and narrations based on the current matter data and delete accounting items if criteria is no longer met. Any ad hoc or additional accounting items added to the account will not be removed when updating the account.

**Update Account dialog for Bonds:**



**Update Account dialog for Transfers:**

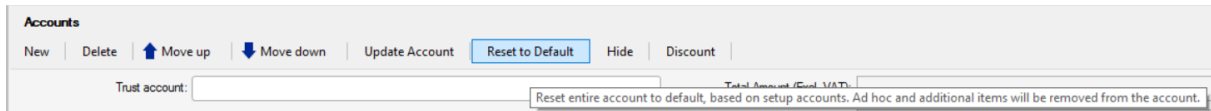


The Change column indicates the type of change will be applied to the account once updated.

- Update – Indicates an existing account line item’s Amount will be updated.
- New – Indicates a new line item is being added to the account.
- Delete – Indicates a line item will be deleted from the account.

- *Reset to Default:*

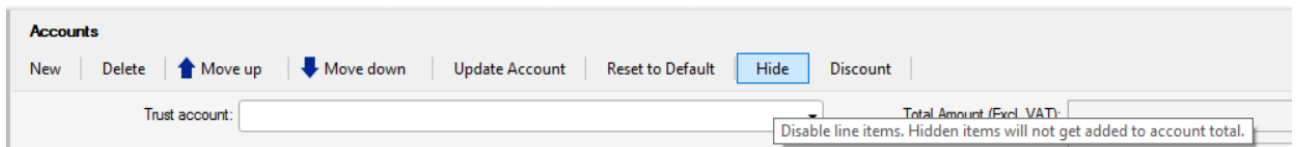
Clicking on **Reset to Default** will reset the entire account to default, based on setup accounts and any ad hoc and additional account items will be removed from the account.



This basically creates a brand-new account based on setup and the current matter data evaluated against the criteria.

- *Hide/Unhide:*

This functionality was previously only available on Transfer accounts. Clicking **Hide** will disable the selected account line items, these items will not be added to the total or rolling balance of the account and will not be displayed on the statement of account. Clicking Unhide will enable the account items.



**Accounts**

New | Delete | Move up | Move down | Update Account | Reset to Default | Unhide | Discount

Trust account: [dropdown] Total Amount (Excl. VAT): 8896.50

BEE discount applies:  Total VAT: 1183.50

Narration	Amount	VAT	Total	Balance
To Deeds Office Search Fee	150.00	22.50	172.50	172.50
To Initiation fee	199.50	0.00	199.50	372.00
To Valuation fee	615.60	0.00	615.60	372.00
To Deeds Office Fee	507.00	0.00	507.00	879.00
To postages, petties and telephone	200.00	30.00	230.00	879.00
To our fees for taking instruction, drawing Power of Attorney ...	7 740.00	1 161.00	8 901.00	9 780.00
Electronic Document Generation Fee	300.00	0.00	300.00	10 080.00

**Details**

Narration: To Valuation fee [refresh icon]

Nature: Disbursement [dropdown]

Narrative for VAT-only entry (if required): [text area]

Amount (excl. VAT): 615.60 [refresh icon]

Vatable:

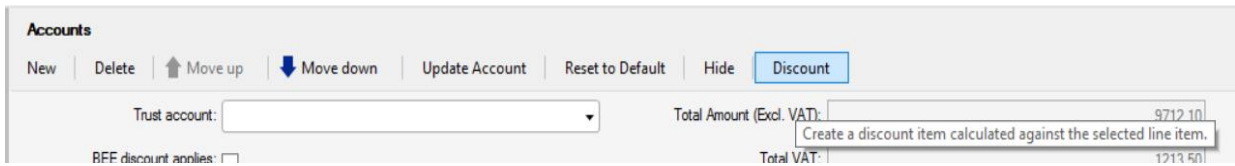
VAT Amount: 0.00

Amount (Incl. VAT): 615.60

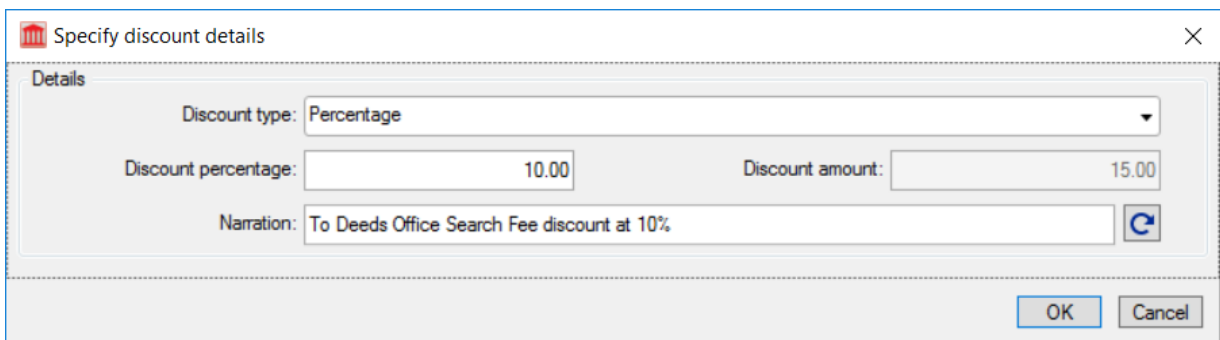
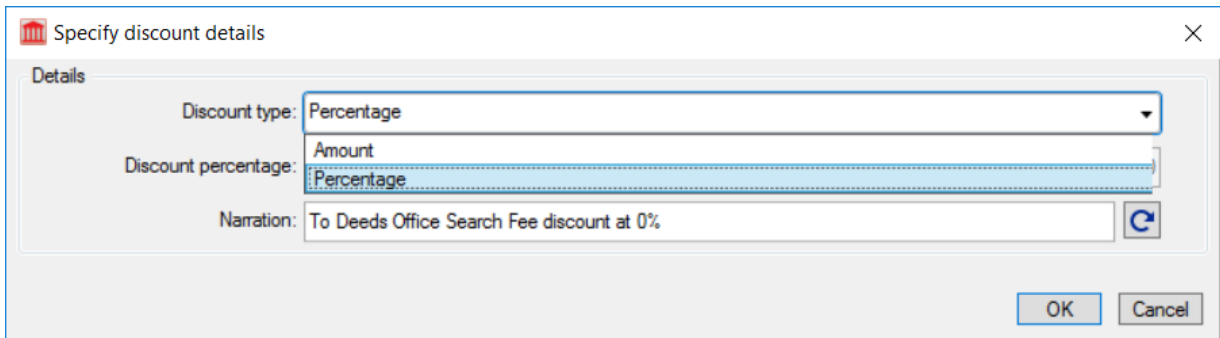
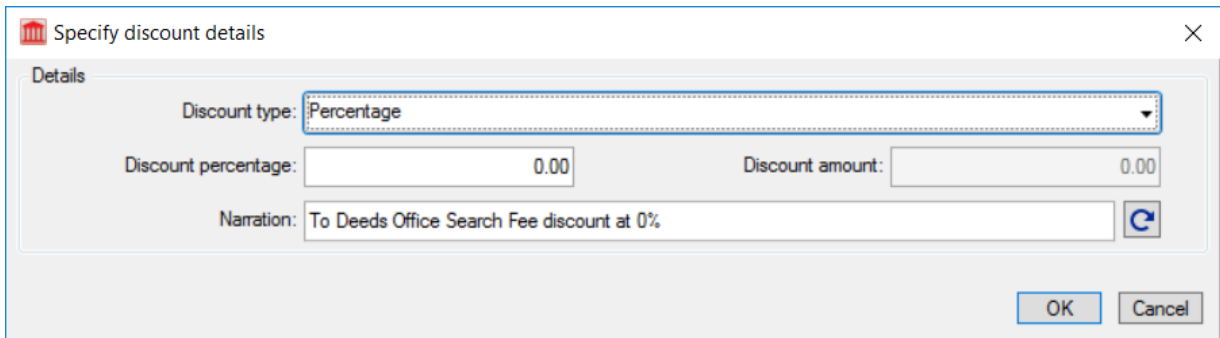


- *Discount:*

Clicking on the discount button will create a discount account item calculated against the selected line item. This functionality was previously only available on Consents and Correspondent matters.



A discount type of Percentage or Amount can be selected. A Discount percentage can be captured if *Percentage* was selected as Discount type or vice versa for Discount amount if *Amount* is selected as Discount type.



Clicking OK will add a new discount account item to the account.

**Accounts**

New | Delete | Move up | Move down | Update Account | Reset to Default | Hide | Discount

Trust account:  Total Amount (Excl. VAT):

BEE discount applies:  Total VAT:

Narration	Amount	VAT	Total	Balance
To Deeds Office Search Fee	150.00		22.50	172.50
To Deeds Office Search Fee discount at 10%	-15.00		-2.25	-17.25
To Initiation fee	199.50		0.00	199.50
To Valuation fee	615.60		0.00	615.60
To Deeds Office Fee	507.00		0.00	507.00
To postages, petties and telephone	200.00		30.00	230.00
To our fees for taking instruction, drawing Power of Attorney t...	7 740.00		1 161.00	8 901.00
Electronic Document Generation Fee	300.00		0.00	300.00

**Details**

Discount type:

Discount percentage:  Discount amount:

Narration:

- *Balance:*

The Balance button is only available on Transfer Accounts for Transferee, Transferor and Firm Accounts. Clicking the Balance button will add the balancing line items to each account with narrative 'To Amount Due by you' or 'By amount due by you' for the Transferor, Transferee and Firm account.

**Transferee**

New | Delete | Move up | Move down | Update Account | Reset to Default | Hide | Discount | **Balance**

Pro forma printed:

Trust account:  Total Amount (Excl. VAT):

BEE discount applies:  Total VAT:

*Balance the transfer accounts by adding the amount due line item.*

**Transferee**

New | Delete | Move up | Move down | Update Account | Reset to Default | Hide | Discount | **Balance**

Pro forma printed:

Trust account:  Total Amount (Excl. VAT):

BEE discount applies:  Total VAT:

Narration	Amount	VAT	Total	Balance
To transfer fees	11 600.00		1 740.00	13 340.00
To transfer duty	53 000.00		0.00	53 000.00
To Deeds Office fee	500.00		0.00	500.00
To Deeds Office search	250.00		37.50	287.50
To postages and petties	350.00		52.50	402.50
To Document Generation Charge	389.00		58.35	447.35
To FICA identification and verification fee	300.00		45.00	345.00
To purchase price	1 350 000.00		0.00	1 350 000.00
By deposit received	-100 000.00		0.00	-100 000.00
By balance of purchase price	-1 250 000.00		0.00	-1 250 000.00
To lodging agent's fee as 0.97% of Tariff Fee	114.00		17.10	131.10
By amount owed by you	-66 503.00		-1 950.45	-68 453.45

## Account Summary:

The Account Summary provides some basic information. It can include the following fields based on matter type:

Pro forma printed:

Trust account:

BEE discount applies:

Total Amount (Excl. VAT):

Total VAT:

- *Trust account:* This is a dropdown list of all the firm's trust accounts.

Trust account:

BEE discount applies:

Total Amount (Excl. VAT):

Total VAT:

Narration	VAT	Total	Balance
To Deeds Office Search Fee	18.00	138.00	138.00
To Deeds Office Fee	0.00	632.00	770.00
To postages, petty and telephone	30.00	230.00	1 000.00

- *Total Amount (Excl. VAT):* This is the sum of the Amount (Excl. VAT) of all the account line items.
- *Total VAT:* This is the sum of all the VAT amounts.
- *BEE discount applies:* This field applies to all matter types except for Correspondent matters. A discount line item will be created and the BEE documents will schedule in the print list.
- *Name for Account to be credited:* This field is only available for Consents and is used on the Request for Guarantees Letter.

## Account item grid view:

The account item grid view has the following columns:

- Narration
- Amount - Debit amounts will be indicated as positive and Credit amounts will be indicated as negative.
- VAT
- Total (Calculated) – the line item total = Amount + VAT
- Balance (Calculated) – the total of all the line items above including the current line item.

## Account item details:

The details of the account line item are now displayed for the selected account item. The following fields based on matter type are available to complete in the Account item Details group box:

## Bonds:

To Deeds Office Search Fee	120.00	18.00	138.00	1 748.00
To Deeds Office Fee	632.00	0.00	632.00	2 380.00
To postages, petty and telephone	200.00	30.00	230.00	2 610.00
To our fees for taking instruction, drawing Power of Attorney to ...	12 700.00	1 905.00	14 605.00	17 215.00

Details	
Narration: To Deeds Office Search Fee <input type="button" value="C"/>	Amount (excl. VAT): 120.00 <input type="button" value="CE"/>
Nature: Fee	Variable: <input checked="" type="checkbox"/>
Narrative for VAT-only entry (if required): To VAT on Deeds Office search fee	VAT Amount: 18.00
	Amount (Incl. VAT): 138.00

- **Narration:**
  - The narration of the account item as captured in Setup. The narration can be edited. Clicking on the Refresh button next to the Narration field will reset the value to the default value captured in Setup for the specific account line item.
- **Nature:**

The following list of Nature's are available for Transfers, Consents and Correspondent Matters:

- Fee
- Disbursement,
- Journal
- Payment
- Receipt

The following list of Nature's are available for Bonds and Developments:

- Fee
- Disbursement

- **Narrative for VAT-only entry (if required):**
  - Completed specifically for VAT-only account items displayed in the statement of account.
- **Amount (Excl. VAT):**
  - The Amount (excl. VAT) is populated from the value captured in Setup.
  - For Transfer Accounts: This field will become disabled if VAT Type of *Vatable:Inclusive* is selected.
  - The Amount (excl. VAT) is calculated as (Amount (incl. VAT) – VAT Amount).
  - Calculator: Clicking this button recalculates the amount based on what is captured in setup as well as what is currently captured on the matter.
- **Vatable:**
  - Selected on the Account line item for Bonds, Consents, Correspondent Matters and Developments.
  - Changing the VAT details will recalculate the VAT amounts.

- **VAT Type:**
  - Only available on Transfer Accounts.
  - Values include:
    - Non-Vatable
    - Vatable: Exclusive
    - Vatable: Inclusive
    - Vatable: Zero-rated

<b>Details</b> Narration: <input type="text" value="To transfer fees"/> Nature: <input type="text" value="Fee"/> Narrative for VAT-only entry (if required): <input type="text"/> Party: <input type="text" value="Transferee"/>		Amount (excl. VAT): <input type="text" value="15780.00"/> Vat Type: <input type="text" value="Vatable: Exclusive"/> VAT Amount: <input type="text" value="2367.00"/> Amount (Incl. VAT): <input type="text" value="18147.00"/>
<b>Balancing Entry</b> Narration: <input type="text" value="By transfer fees"/> Nature: <input type="text" value="Fee"/> Narrative for VAT-only entry (if required): <input type="text"/> Party: <input type="text" value="Firm"/>		Amount (excl. VAT): <input type="text" value="-15780.00"/> Vat Type: <input type="text" value="Vatable: Exclusive"/> VAT Amount: <input type="text" value="-2367.00"/> Amount (Incl. VAT): <input type="text" value="-18147.00"/>

- **VAT Amount:**
  - The VAT Amount is a disabled field displaying the calculated VAT Amount based on VAT type.
- **Amount (Incl. VAT):**
  - The Amount (Incl. VAT) field is only enabled when the VAT Type is Inclusive of VAT and will be calculated as (Amount (excl. VAT) + VAT Amount).

<b>Details</b> Narration: <input type="text" value="To postages and petties"/> Nature: <input type="text" value="Fee"/> Narrative for VAT-only entry (if required): <input type="text"/> Party: <input type="text" value="Transferee"/>		Amount (excl. VAT): <input type="text" value="100.00"/> Vat Type: <input type="text" value="Vatable: Exclusive"/> VAT Amount: <input type="text" value="15.00"/> Amount (Incl. VAT): <input type="text" value="115.00"/>
<b>Balancing Entry</b> Narration: <input type="text" value="By postages and petties"/> Nature: <input type="text" value="Fee"/> Narrative for VAT-only entry (if required): <input type="text"/> Party: <input type="text" value="Firm"/>		Amount (excl. VAT): <input type="text" value="-100.00"/> Vat Type: <input type="text" value="Vatable: Exclusive"/> VAT Amount: <input type="text" value="-15.00"/> Amount (Incl. VAT): <input type="text" value="-115.00"/>

<b>Details</b> Narration: <input type="text" value="To postages and petties"/> Nature: <input type="text" value="Fee"/> Narrative for VAT-only entry (if required): <input type="text"/> Party: <input type="text" value="Transferee"/>		Amount (excl. VAT): <input type="text" value="86.96"/> Vat Type: <input type="text" value="Vatable: Inclusive"/> VAT Amount: <input type="text" value="13.04"/> Amount (Incl. VAT): <input type="text" value="100.00"/>
<b>Balancing Entry</b> Narration: <input type="text" value="By postages and petties"/> Nature: <input type="text" value="Fee"/> Narrative for VAT-only entry (if required): <input type="text"/> Party: <input type="text" value="Firm"/>		Amount (excl. VAT): <input type="text" value="-86.96"/> Vat Type: <input type="text" value="Vatable: Inclusive"/> VAT Amount: <input type="text" value="-13.04"/> Amount (Incl. VAT): <input type="text" value="-100.00"/>

- **Party:**
  - This field is only available on Transfer Accounts and indicates the Party associated to the account item. E.g. Transferee, Transferor or Firm.
- **Balancing Entry:**
  - The Balancing Entry details group box is only available on Transfer Accounts.

Transfers:

To Deeds Office fee	889.00	0.00	889.00	31 236.32
To FICA identification and verification fee	250.00	35.00	285.00	31 521.32
To purchase price	750 000.00	0.00	750 000.00	781 521.32
By proceeds of bond	-500 000.00	0.00	-500 000.00	281 521.32
By amount due by you	-280 026.55	-2 240.77	-282 267.32	-746.00

**Details**

Narration:

Amount (excl. VAT):

Nature:

Vat Type:

Narrative for VAT-only entry (if required):

VAT Amount:

Party:

Amount (incl. VAT):

---

**Balancing Entry**

Narration:

Amount (excl. VAT):

Nature:

Vat Type:

Narrative for VAT-only entry (if required):

VAT Amount:

Party:

Amount (incl. VAT):

Consents:

**Details**

Narration:

Amount (excl. VAT):

Nature:

Vatable:

Narrative for VAT-only entry (if required):

VAT Amount:

Amount (incl. VAT):

The Firm’s Trust Account is now available for selection on the Consent Account.

Correspondent matters:

**Details**

Narration:

Amount (excl. VAT):

Nature:

Vatable:

Narrative for VAT-only entry (if required):

VAT Amount:

Amount (incl. VAT):

Developments:

Details

Narration:

Nature:

Narrative for VAT-only entry (if required):

Amount (excl. VAT):

Vatable:

VAT Amount:

Amount (Incl. VAT):

## Setup: Account Items

A new Accounting Items tab has been added in Setup. This provides a new centralised location to set up and configure accounts per matter type.

**Account Items**

- Bonds
- Consent
- Correspondent
- Development
- ▶ Transfer (56)

The Account Items setup view is similar for all matter types.

For Setup > Accounting Items > Bonds:

**Bonds**

New Delete Move up Move down Revert  Include inactive items?

Source	Description
System	Fee
User Modified	Lodging agent's fee
User Modified	HomeOwners Association consent fee
User Modified	Fee Reduction
System	FICA identification and verification fee
User Modified	To Postage, petties and telephone
User Modified	Lodging agent's posts and petties
User Modified	Fee for preparing Surety
User Modified	Fee for preparing Surety and Pledge
User	Fee for preparing surety for housing scheme
User Modified	Fee for preparing cert of right of leasehold
User Modified	To Stamp Duty on Bond
User Modified	Deeds Office Fee
System	To Deeds Office Search Fee

**General**

Description:  Amount:

Code:  Vatable:

Nature:

Ad hoc account item?

Criteria:

**Narrations**

Narration Debit (Eng):

Narration Debit (Afr):

There are 3 types of Account Items, which can be identified by their Source:

- System:
  - o These are the default account items available in Lexis Convey.
- User Modified:

- These are the System account items that are modified by changing data on the item.
- User:
  - These are newly added account items.

The Tool Bar at the top of the Account Items grid allows the user to do the following:

- Buttons:
  - *New* – clicking on New will add a new blank/empty account item at the bottom of the list and allow the user to capture the necessary data.
  - *Delete* – clicking on Delete will remove the account item from the grid, making the account item inactive.
    - All customised data will be retained on a User Modified accounting item even if it was deleted.
    - Multi-selecting account item rows are available with this option.
  - *Revert* – clicking on Revert will revert a User Modified account item back to the default System account item entry.
    - Multi-selecting account item rows are available with this option for all matter types except Transfers.
  - *Move up/ Move down* – clicking Move up and Move down will change the sequence of the account items in the grid. This allows the user to decide where an accounting item should be displayed on the account.
- Checkbox:
  - *Include inactive items?* – clicking on Include inactive items will display the deleted System, User Modified and User added account items and allows the user to reactivate them.

The details of the account line item are displayed for the selected account item. The following fields, based on matter type, are available to complete for each account item:



**Bonds**

New | Delete | Move up | Move down | Revert |  Include inactive items?

Source	Description
System	Fee
User Modified	Lodging agent's fee
User Modified	HomeOwners Association consent fee
User Modified	Fee Reduction
System	FICA identification and verification fee
User Modified	To Postage, petties and telephone
User Modified	Lodging agent's posts and petties
User Modified	Fee for preparing Surety
User Modified	Fee for preparing Surety and Pledge
User	Fee for preparing surety for housing scheme
User Modified	Fee for preparing cert of right of leasehold
User Modified	To Stamp Duty on Bond
User Modified	Deeds Office Fee
System	To Deeds Office Search Fee
User	Stamp Duty on Guarantees

**General**

Description: \* FICA identification and verification fee      Amount: `!True(Bond.FICAFee=0,!True(Bond.Mortgagor.Type<2,!True(Bond.Grou`

Code: \* FICAFEE      Vatable:

Nature: Fee

Ad hoc account item?

Criteria: `!True(Bond.GroupCode="STD") OR NOT(Bond.FICAFeePayable),False,True`

**Narrations**

Narration Debit (Eng): To FICA identification and verification fee

Narration Debit (Afr): Aan FICA identifikasie en verifikasiefooi

**Bonds**

New | Delete | Move up | Move down | Revert |  Include inactive items?

Source	Description
System	Fee
User Modified	Lodging agent's fee
User Modified	HomeOwners Association consent fee
User Modified	Fee Reduction
System	FICA identification and verification fee
User Modified	To Postage, petties and telephone
User Modified	Lodging agent's posts and petties
User Modified	Fee for preparing Surety
User Modified	Fee for preparing Surety and Pledge
User	Fee for preparing surety for housing scheme
User Modified	Fee for preparing cert of right of leasehold
User Modified	To Stamp Duty on Bond
User Modified	Deeds Office Fee
System	To Deeds Office Search Fee
User	Stamp Duty on Guarantees

**General**

Description: \* Fee for preparing surety for housing scheme      Amount: `FirmDetails.SuretyFee`

Code: \* HOUSINGFEE      Vatable:

Nature: Fee

Ad hoc account item?

Criteria: `!True(Bond.SpecialSurety1Ind AND Not(FirmDetails.SuretyFee=0),True,False)`

**Narrations**

Narration Debit (Eng): To preparation of Suretyship for Housing Scheme

Narration Debit (Afr): Aan voorbereiding van behuisingkema borgstelling


## General group box:

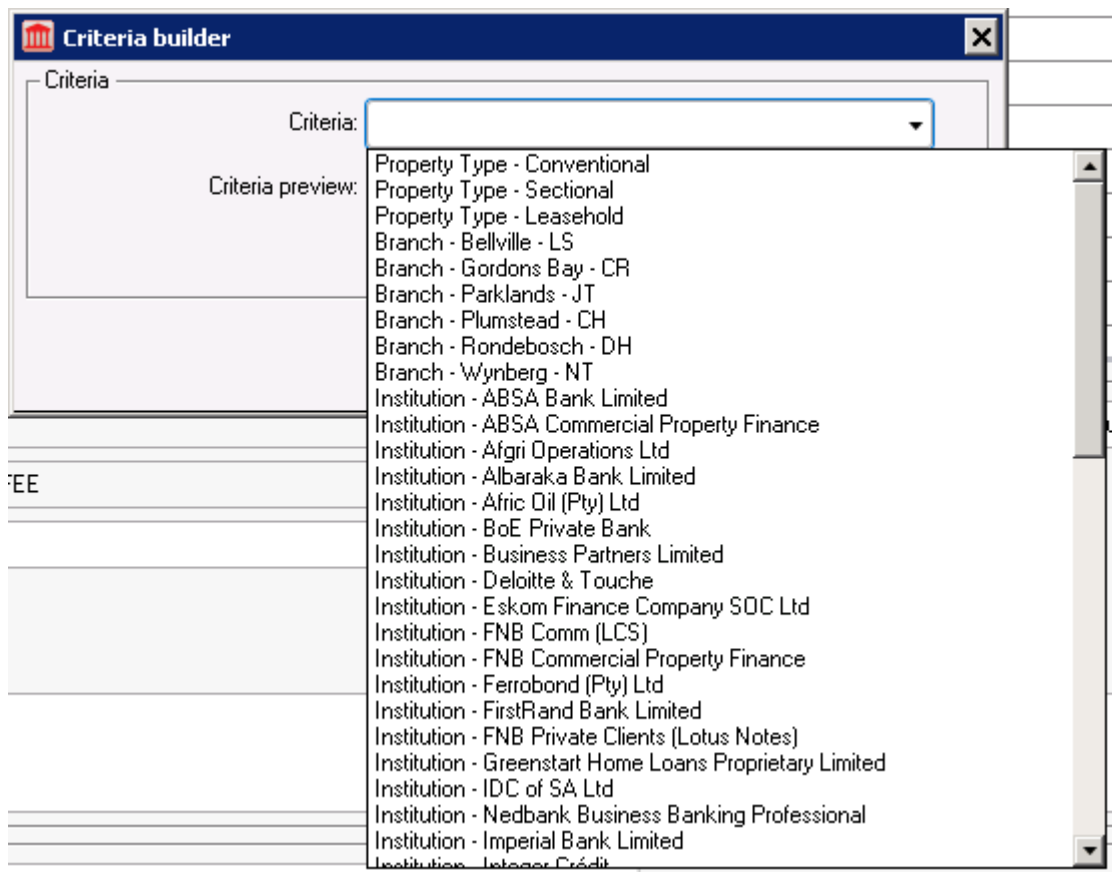
- *Description:*
  - The description of the account item. The description field will be disabled for System and User Modified account items and editable for User added account items.
- *Code:*
  - This is the unique transaction code. The Code is unique per matter type.
  - The Transaction code will now be available on all Matter types including Consents and Correspondent Matters.
- *Nature:*
  - This is the type of account item.
    - Bonds and Developments:
      - Fee
      - Disbursement
    - Transfers, Consents and Correspondent Matter
      - Fee
      - Disbursement,
      - Journal
      - Payment
      - Receipt
- *Ad hoc account item:*
  - Checking this field will enable this account item to be added to the matter on an ad hoc basis. This account item will be added to the account when clicking New inside the matter account.

Ad hoc account item?

Criteria: Ad hoc account items will not display on the matter until it is manually added to the matter

- *Criteria:*
  - This field indicates that the account item has certain criteria that needs to be met for it to be applicable to the matter's account.
  - When no criteria exist, the account item will apply to the matter account by default.
  - A Criteria Builder is available to assist in completing criteria for the account item.
- *Criteria Builder:*
  - The Criteria builder will now be available on all matter types, including Consents and Correspondent Matters and additional fields have been made available for Bonds, Transfers and Development.
  - The Criteria builder is accessed by clicking on the [...] button next to the Criteria field.

Criteria: `IFTTrue(Bond.SpecialSurety1Ind.AND Not(FirmDetails.SuretyFee=0),True,False)` 



o The following additional fields have been included:

- Consent Matters:
  - Property Type
  - Consent type
  - Branch
  - Party Types
  - Number of Existing Bonds
  - Institution/Bondholder (FSP)
  - Registered Bond amount
  - Consenter
  - Deeds Office
  - Discharge Amount
  - Count of Parties on matter
  - Firms Trust Account
- Correspondent Matters
  - Matter (sub)Type
  - Cause of action
  - Property Type
  - Branch
  - Registered Bond Amount
  - Deeds office
  - Tariff
  - Lodging Agent Fee

- Number of Documents Enclosed
- Count of Parties on matter
- Firms Trust Account
- Bonds
  - Institution
  - Firms Trust Account
- Transfers
  - Party Type
  - Count of Parties on matter
  - Firms Trust Account
- Developments
  - Party Type
  - Count of Parties on matter
  - Firms Trust Account

• **Amount:**

- This is the base amount of the account item.
- The Amount field allows for Calculations or Criteria to be added based on fill points available for the matter. Examples below.

Description: *	Consent fee	Amount:	1800*1.1
Code:	TARIFFEE	Vatable:	<input checked="" type="checkbox"/>
Nature:	Fee		

Description: *	Fee Reduction	Amount:	$[(\text{Bond.ActualFee} + \text{Bond.LodgingAgentFee}) * \text{Bond.FeeReduction}/100]^*1$
Code: *	FEERED	Vatable:	<input checked="" type="checkbox"/>
Nature:	Fee		

Amount:	Transfer.PurchasePrice
---------	------------------------

• **Vatable:**

- This field is selected when VAT should be added to the account item. This will default the account item as exclusive of VAT on the matter account.

• **Post to this account:**

- This field is only available for Transfer Account Items and indicates which account the account item should be posted to by selecting the paying and receiving party types i.e. Transferee, Transferor or Firm account.

General			
Description: *	To purchase price	Amount:	Transfer.PurchasePrice
Code:	PURCHPRICE	Vatable:	<input checked="" type="checkbox"/>
Nature:	Journal		
Post to this account: *	Transferee		
Ad hoc account item?	<input type="checkbox"/>		
Criteria:	Transfer.ProformaPrintedInd AND Not((Transfer.CauseOfActionCode=5) OR (Transfer.CauseOfActionCode=6) OR (Transfer.CauseOfActionCode=7))		

## Narrations group box:

Narrations			
Narration Debit (Eng):	To purchase price	Narration Credit (Eng):	
Narration Debit (Afr):	Aan kooppys	Narration Credit (Afr):	
Narration for VAT - only entries (Eng):		Narration for VAT - only entries (Afr):	

- **Narration Debit (Eng):**
  - This is the English narrative of the debit account item entry based on the matter language and will display on the Statement of Account accordingly.
- **Narration Debit (Afr):**
  - This is the Afrikaans narrative of the debit account item based on the matter language and will display on the Statement of Account accordingly.
- **Narration Credit (Eng):**
  - This is the English narrative of the credit account item entry based on the matter language and will display on the Statement of Account accordingly.
- **Narration Credit (Afr):**
  - This is the Afrikaans narrative of the credit account item based on the matter language and will display on the Statement of Account accordingly.
- **Narration for VAT-only Entries (Eng.):**
  - This is the English narrative used for when there is a separate VAT account item entry based on the matter language.
- **Narration for VAT-only Entries (Afr.):**
  - This is the Afrikaans narrative used for when there is a separate VAT account item entry based on the matter language.

## Correspondent Matter types group box:

This group box is only available for Correspondent Matter Account Items.

- **Sub Types:**
  - The selection of the Correspondent Matter sub type indicates the applicable account for the account item selected.
- **Other Matter types:**
  - The selection of Other Correspondent Matter types become available once Other is selected as a Sub Type on User added account items.

Correspondent Matter types

Sub Types:  Bond  
 Consent  
 Transfer  
 Other

Select All:

Other Matter types:  Antenuptial Contract  
 Consent to Section 57 application  
 Consent by HomeOwners Association  
 Notarial Deed of Servitude  
 Notarial Deed of Cession  
 Notarial Deed of Usufruct  
 Notarial Deed of Habitatio  
 General Power of Attorney  
 Section 4(1)(b) application

Correspondent Matter types

Sub Types:  Bond  
 Consent  
 Transfer  
 Other

Select All:

Other Matter types:  Antenuptial Contract  
 Consent to Section 57 application  
 Consent by HomeOwners Association  
 Notarial Deed of Servitude  
 Notarial Deed of Cession  
 Notarial Deed of Usufruct  
 Notarial Deed of Habitatio  
 General Power of Attorney  
 Section 4(1)(b) application

### Transfer Account Items Transaction Code View

The Transfers Accounting Item view presents the user with the list of the transaction codes for each accounting item as it consists of the account item(s) and the balancing entry. The account items associated to the transaction code can be viewed or edited by selecting a specific transaction code or by double clicking on the grid entry.

The order of the Transaction code can be changed by using the “Move up” and “Move down” buttons. The order of the account items on the matter account is based on the order in Setup.

The entire Transaction code, including all it’s associated account item entries can be deleted from this view by clicking on the “Delete” button.

A User Modified Transaction Code can be reverted to its original default state by clicking on the “Revert” button.

Source	Transaction Code
System	TARIFFFEE
System	TARIFFFEERED
System	TRANSFERDUTY
System	AGENTSCommission
System	DEEDSFEE
System	DEEDSEARCH
System	P&P
User	TBS
System	FICAFEE
System	PURCHPRICE
System	DEPOSIT
System	PROCEEDSOFBOND
System	TRANSFERELECFFEE
System	BALOPURCHPRICE
System	TRANSFERDUTYSUBMISSIONFEE
System	DISCHARGEBONDAMOUNT
System	VATONPURCHPRICE
System	VATONPURCHPRICEPAID
System	TRANSFERDUTYPENALTY
System	RATESCLEARANCE
System	LEVYCLEARANCE
System	ARREARRATES
System	LEGALCOSTS

Selecting the Transaction Code line item:

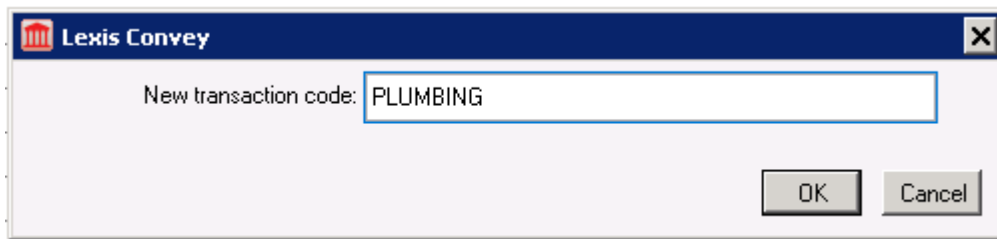
Source	Description
User Modified	To purchase price
User Modified	By purchase price

<b>General</b> Description: * <input type="text" value="To purchase price"/> Amount: <input type="text" value="Transfer.PurchasePrice"/> Code: <input type="text" value="PURCHPRICE"/> Vatable: <input type="checkbox"/> Nature: <input type="text" value="Journal"/> Post to this account: * <input type="text" value="Transferee"/> Ad hoc account item? <input type="checkbox"/> Criteria: <input type="text" value="Transfer.ProformaPrintedInd AND Not(Transfer.CauseOfActionCode=5) OR (Transfer.CauseOfActionCode=6) OR (Transfer.CauseOfActionCode=7)"/>	
<b>Narrations</b> Narration Debit (Eng): <input type="text" value="To purchase price"/> Narration Credit (Eng): <input type="text"/> Narration Debit (Afr): <input type="text" value="Aan koopprys"/> Narration Credit (Afr): <input type="text"/> Narration for VAT - only entries (Eng): <input type="text"/> Narration for VAT - only entries (Afr): <input type="text"/>	

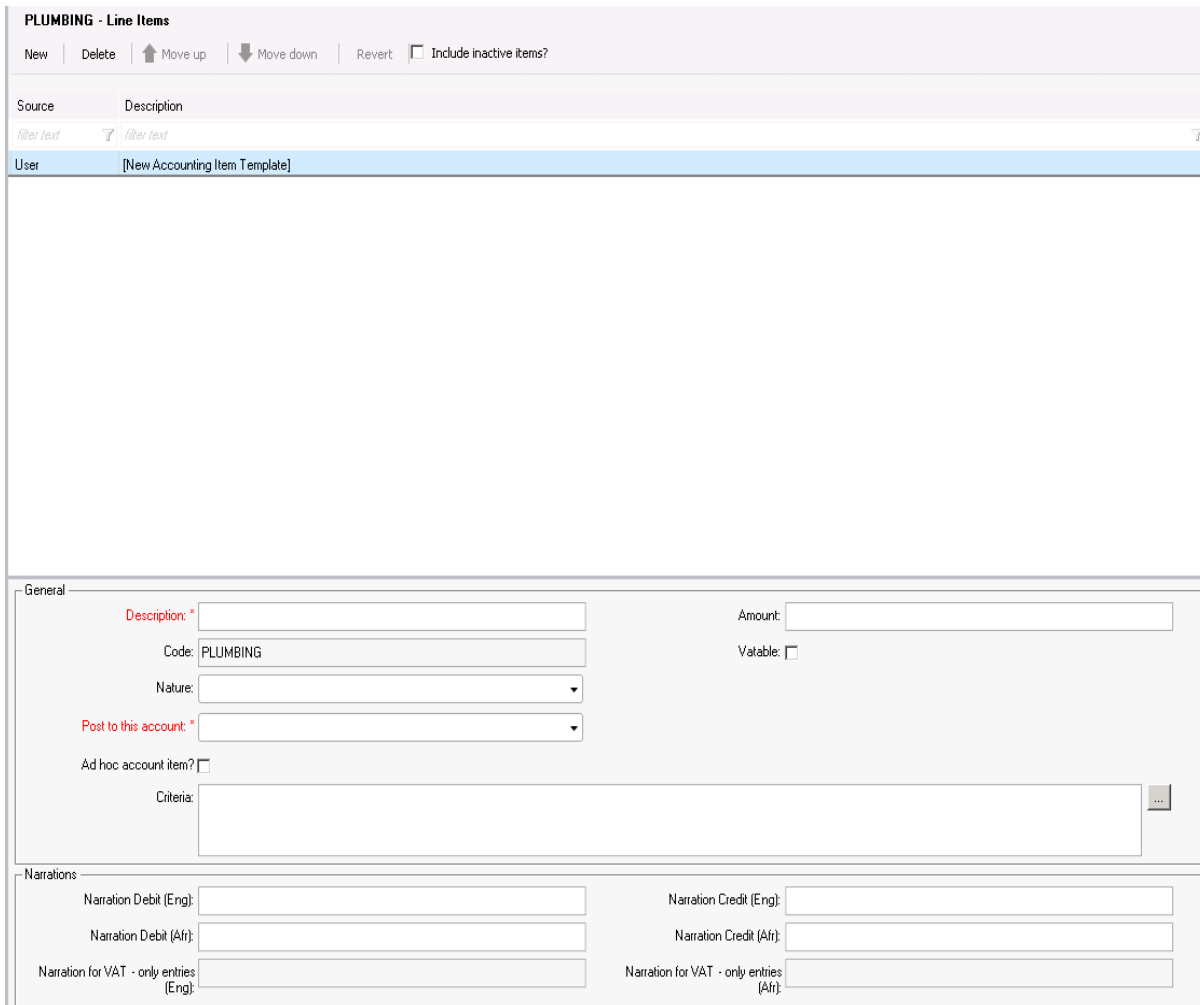
A new Transaction code can be added by clicking on the “New” button:

The system will prompt for a new Transaction code to be completed.



A screenshot of a Lexis Convey dialog box. The title bar reads "Lexis Convey" with a close button (X) on the right. The main area contains the text "New transaction code:" followed by a text input field containing the word "PLUMBING". At the bottom right of the dialog are two buttons: "OK" and "Cancel".

The line items for the new “PLUMBING” Transaction code can now be completed:



A screenshot of the "PLUMBING - Line Items" form. At the top, there are buttons for "New", "Delete", "Move up", "Move down", "Revert", and a checkbox for "Include inactive items?". Below this is a table with columns "Source" and "Description". The first row shows "User" and "[New Accounting Item Template]". Below the table is a "General" section with fields for "Description:" (empty), "Code:" (PLUMBING), "Nature:" (dropdown), "Post to this account:" (dropdown), "Amount:" (empty), "Vatable:" (checkbox), and "Criteria:" (empty with a search icon). Below the "General" section is a "Narrations" section with fields for "Narration Debit (Eng)", "Narration Debit (Afr)", "Narration for VAT - only entries (Eng)", "Narration Credit (Eng)", "Narration Credit (Afr)", and "Narration for VAT - only entries (Afr)".

The system will automatically generate the Balancing entry for the first line item created when all required information is completed.

The values for the Balancing entry will be copied from the first entry, the Amount will be set to “Balance” and the Post to this account field will default for the Firm’s account.

The Balancing entry should be reviewed, and the values for the Description and Narration fields should be updated accordingly.

The completed line item view, including the generated Balancing entry with copied values:



**PLUMBING - Line Items**

New | Delete | Move up | Move down | Revert |  Include inactive items?

Source	Description
User	To Plumbing Evaluation Completed Fee
User	To Plumbing Evaluation Completed Fee

---

**General**

Description: \*  Amount:

Code:  Valable:

Nature:

Post to this account: \*

Ad hoc account item?

Criteria:

---

**Narrations**

Narration Debit (Eng):  Narration Credit (Eng):

Narration Debit (Afr):  Narration Credit (Afr):

Narration for VAT - only entries (Eng):  Narration for VAT - only entries (Afr):

The Balancing entry with copied values before updating the Description and Narration fields:

**PLUMBING - Line Items**

New | Delete | Move up | Move down | Revert |  Include inactive items?

Source	Description
User	To Plumbing Evaluation Completed Fee
User	To Plumbing Evaluation Completed Fee

---

**General**

Description: \*  Amount:

Code:  Valable:

Nature:

Post to this account: \*

Ad hoc account item?

Criteria:

---

**Narrations**

Narration Debit (Eng):  Narration Credit (Eng):

Narration Debit (Afr):  Narration Credit (Afr):

Narration for VAT - only entries (Eng):  Narration for VAT - only entries (Afr):

The completed Balancing entry once reviewed, and the Description and Narration fields are updated accordingly:

**PLUMBING - Line Items**

New | Delete | Move up | Move down | Revert |  Include inactive items?

Source	Description
<i>filter text</i>	<i>filter text</i>
User	To Plumbing Evaluation Completed Fee
User	By Plumbing Evaluation Completed Fee

---

**General**

Description: \* By Plumbing Evaluation Completed Fee      Amount: Balance

Code: PLUMBING      Variable:

Nature: Fee

Post to this account: \* Firm

Ad hoc account item?

Criteria:

---

**Narrations**

Narration Debit (Eng):       Narration Credit (Eng): By Plumbing Evaluation Completed Fee

Narration Debit (Afr):       Narration Credit (Afr): Per Loodgieter Evaluasie Voltooi Fooi

Narration for VAT - only entries (Eng):       Narration for VAT - only entries (Afr):

Updating the main account line item entry will affect the Balancing entry. New values will be copied to the existing Balancing entry.

### Discount Account Item Template Improvement

The Account Discount Narration template is now available in Setup > Common > Templates and available for all matter types.

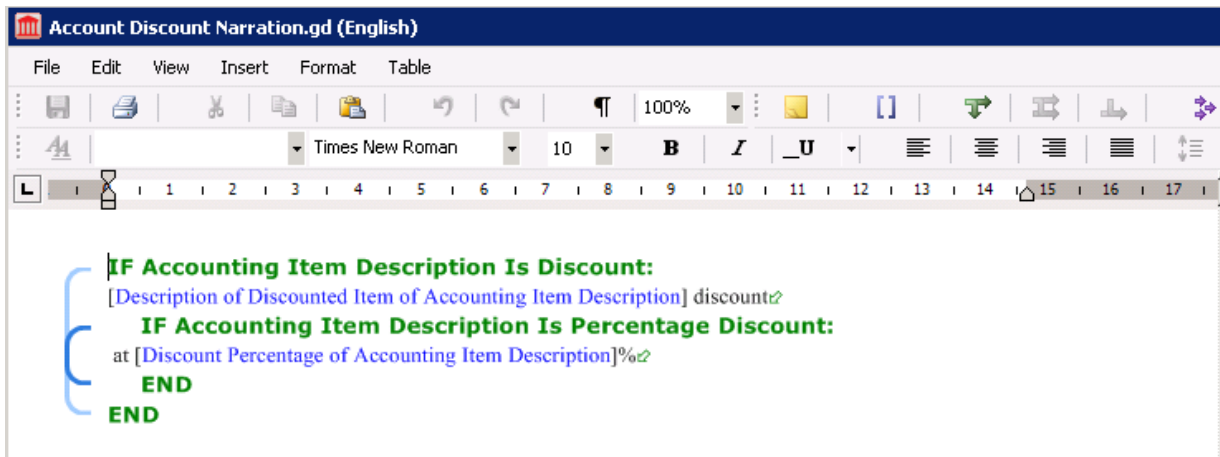
**Firm Settings**

- Our Branches (6)
- Trust Accounts (10)
- Users
- My Settings
- Common**
  - Attorney Firms (26)
  - Comments
  - Conveyancers
  - Conveyancing Areas
  - Deeds Offices
  - Developers
  - Estate Agencies (27)
  - Homeowners Associations
  - Our References
  - Recipient Roles
  - Templates**
  - Township Descriptions

**Templates**

New | Export | Edit | Revert | Delete | Import

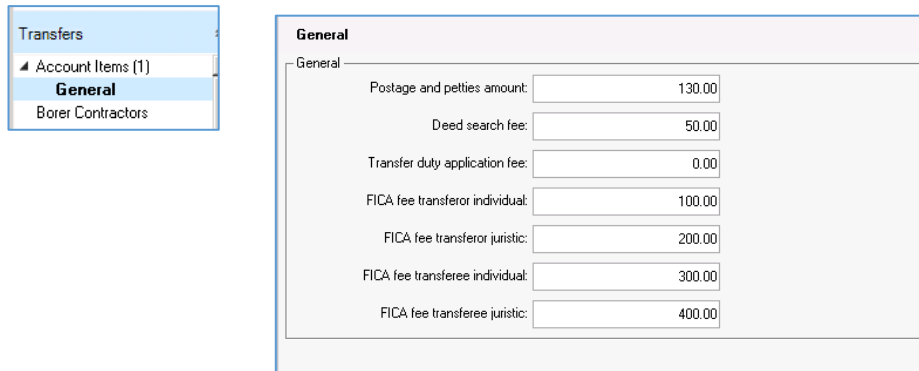
Filename	Type	Link Folder
<i>filter text</i>	<i>filter text</i>	<i>filter text</i>
Source: System [55 items]		
Source: User modified [2 items]		
Account Discount Narration.gd (Afrikaans)	Other	English
Account Discount Narration.gd (English)	Other	Afrikaans



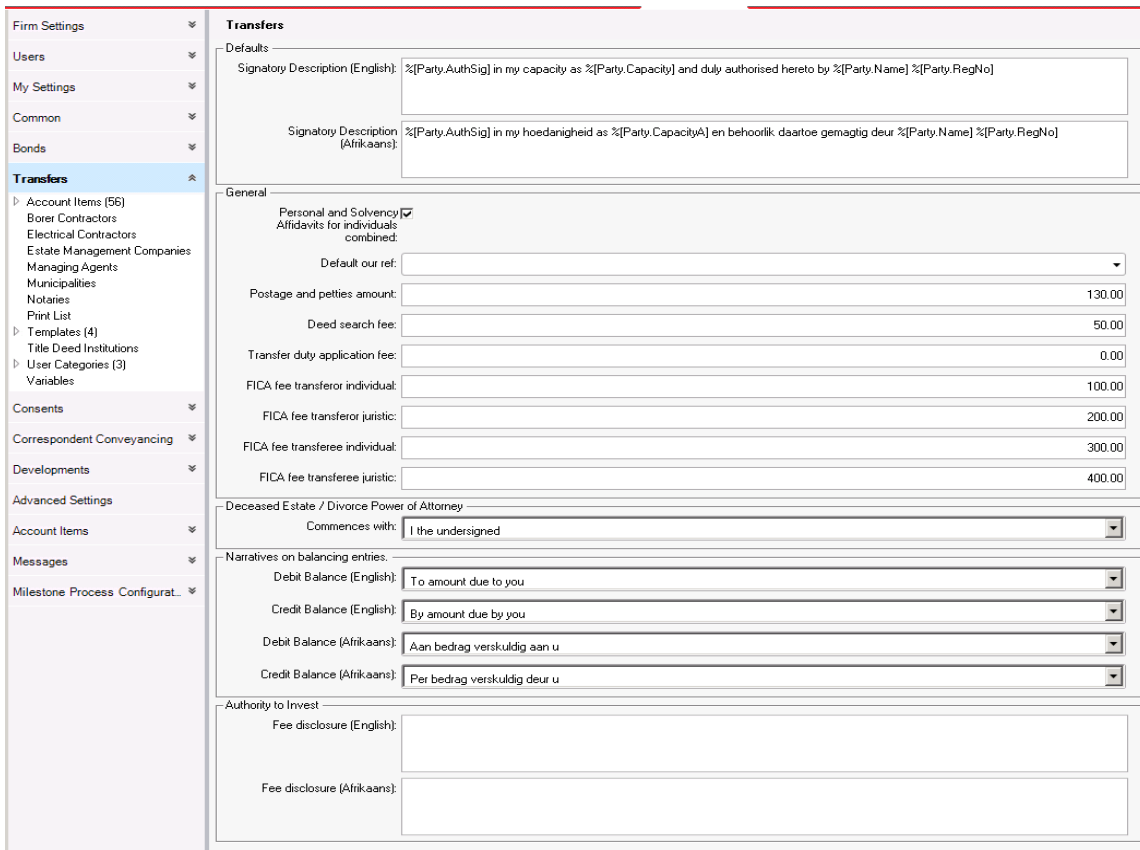
## Transfer Default Fees

The default fees for Transfers that were located at the Transfers > Account Items > General subtab has been moved to the Setup > Transfers tab to be like Bonds.

Before:



After:



## Quotation Calculator

Lexis Convey has improved the usability and functionality of the Quotation Calculator for Bonds and Transfers.

The Firm's Trust Account has been added to both the Bond and Transfer Quotations.

Trust account:

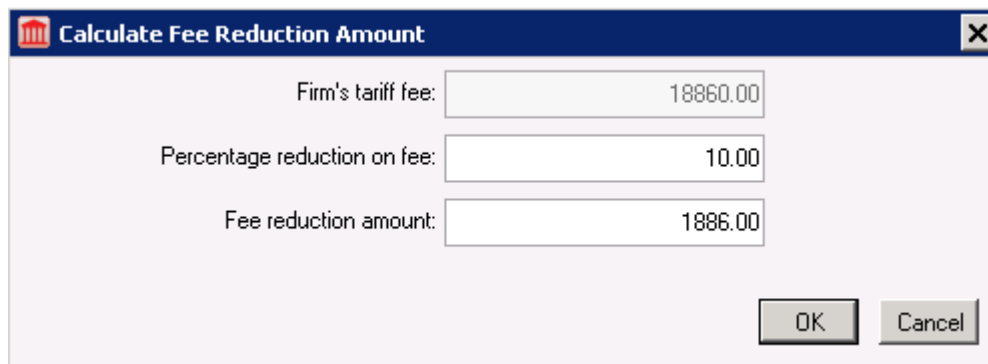
The calculation for the Fee reduction amount calculation for the Bond Quotation Calculator has been updated to be like the Transfers Quotation Calculator.

The Fee reduction amount and its calculator will become enabled once the Purchase price or the Valuation is captured for Transfer Quotation or once the Capital amount is captured for the Bond Quotation.

Capital Amount:

Fee reduction amount:  

The Fee reduction amount can be captured or calculated based on a specific percentage of the Firm's tariff fee.



**Calculate Fee Reduction Amount**

Firm's tariff fee:

Percentage reduction on fee:

Fee reduction amount:

The Bond Quotation Calculator:

**Bond Quotation Calculator** [X]

Institution: ABSA Bank Limited

Date received:  2019/10/15

Mortgagor type: Individual

Property type: Conventional

Language: English

Trust account: ABSA BANK LIMITED

Proclamation: N/A

Debt Type: Home Loan

Number of Properties: 1

Capital Amount: 100000.00

Fee reduction amount: 750.00

Rank of bond: 1

Required when printing the quotation:

Mortgagor Name: Sally Williams

Short Property Description: 15 Sunny Close

Complete for SMS quotations only:

Contact Name at your firm:

Calculate Close

The Transfer Quotation Calculator:

**Transfer Quotation Calculator**
✕

Date of sale:  2019/10/12

Property type: \* Conventional ▼

Transferee type: \* Individual ▼

Trust account: ▼

Number of Properties: 1 ▲▼

Cause of action: Transfer ▼

Reason for action: ▼

Property status: \* improved by a dwelling - with outbuildings ▼

Purchase price: 0.00

VAT on purchase price? \* None ▼

Lodging agents fee: 0.00

Lodging agents post and petties: 0.00

Fee reduction amount: 0.00

FICA fee Transferee: 0.00

Required when printing the quotation: ▼

Transferee language: English ▼

Transferee name: ▼

Short property description: ▼

Complete for SMS quotations only: ▼

Contact Name at your firm: ▼

The Bond and Transfer Quotation will generate the account based the data captured on the Quotation and evaluated against the account items in Setup for the Bond and Transfer Accounts.

Quotation Calculator				
Additional items   Preview   Send ▾   Delete    Move up    Move down				
Description	Amount	VAT	Subtotal	
<i>filter text</i>	<i>filter text</i>	<i>filter text</i>	<i>filter text</i>	<i>filter text</i>
To our fees for taking instruction, drawing Power of Attorney...	18860.00	2829.00	21689.00	
By reduction in fees by 10.00%	-1886.00	-282.90	-2168.90	
To postages, petties and telephone	200.00	30.00	230.00	
To Deeds Office Fee	1020.00	0.00	1020.00	
To Deeds Office Search Fee	200.00	30.00	230.00	
To Electronic Document Generation Fee	55.00	8.25	63.25	
TOTAL (incl VAT)			R 21063.35	

The order of the account items can now be changed by clicking the “Move up” and “Move down” buttons.

A new once-off account item can be added to the Quotation by clicking on the Additional Items button.

**Create additional account item** ✕

Details

Description: <input type="text" value="Custom"/> ⓘ	Amount (excl. VAT): <input type="text" value="0.00"/>
Narration: <input type="text" value="[New account item]"/>	Vatable: <input checked="" type="checkbox"/>
Nature: <input type="text"/>	VAT Amount: <input type="text" value="0.00"/>
Narrative for VAT-only entry (if required): <input type="text"/>	Amount (Incl. VAT): <input type="text" value="0.00"/>

All account items marked as ‘Ad hoc account item’ will be available to add onto the Quotation and will be available for selection from the “Additional items” button and can be selected from the Description drop-down list.

**Create additional account item** ✕

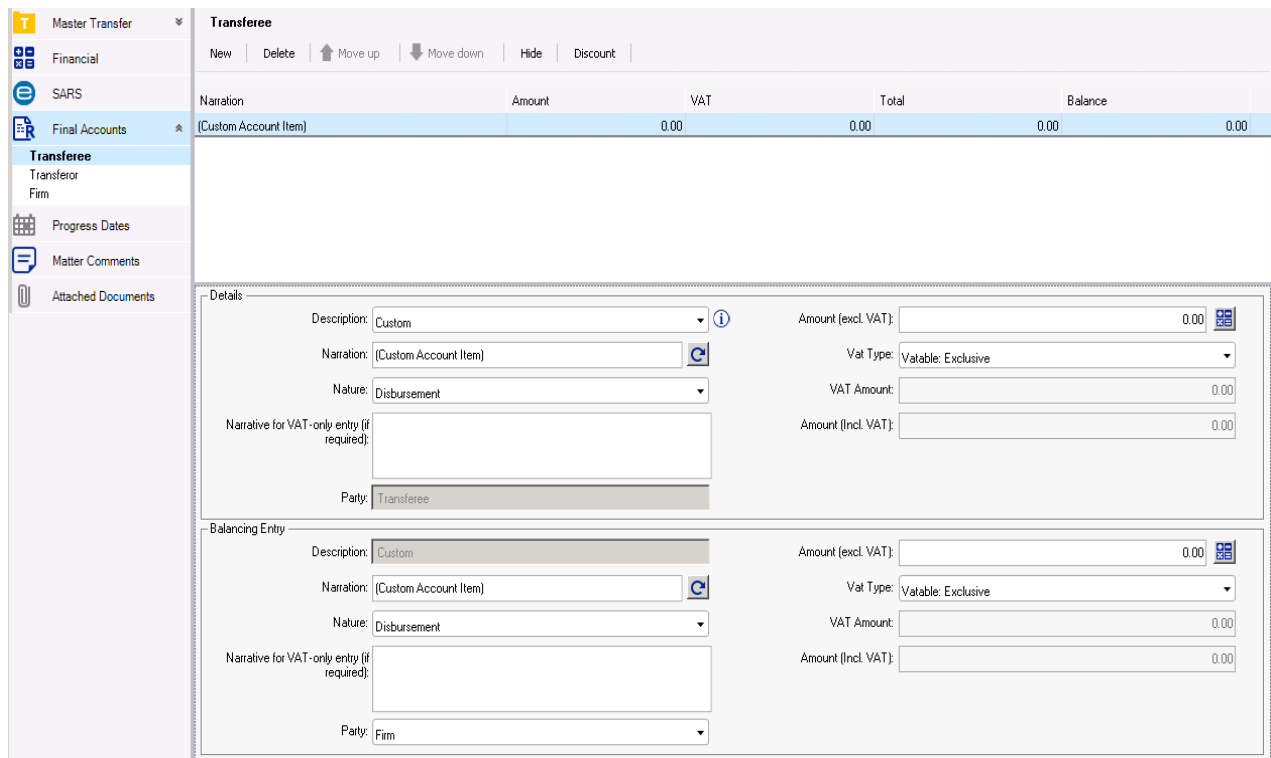
Details

Description: <input type="text" value="Custom"/> ⓘ	Amount (excl. VAT): <input type="text" value="0.00"/>
Narration: <input type="text" value="Insurance Certificate Fee"/>	Information: <input type="text" value="List of line items marked as 'ad hoc' in setup"/>
Nature: <input type="text"/>	Amount (Incl. VAT): <input type="text" value="0.00"/>

The Quotation can be previewed and sent to a recipient via email or SMS.

## Master Transfers: Accounts

A new Final Accounts tab has been added for Master Transfers.



Narration	Amount	VAT	Total	Balance
(Custom Account Item)		0.00	0.00	0.00

**Details**

Description: Custom  
Narration: (Custom Account Item)  
Nature: Disbursement  
Narrative for VAT-only entry (if required):  
Party: Transferee

Amount (excl. VAT): 0.00  
Vat Type: Vatable: Exclusive  
VAT Amount: 0.00  
Amount (Incl. VAT): 0.00

**Balancing Entry**

Description: Custom  
Narration: (Custom Account Item)  
Nature: Disbursement  
Narrative for VAT-only entry (if required):  
Party: Firm

Amount (excl. VAT): 0.00  
Vat Type: Vatable: Exclusive  
VAT Amount: 0.00  
Amount (Incl. VAT): 0.00

Any new additional custom account items OR account items marked as “Ad hoc account item?” in Setup can be added to the Final Accounts and will be applied to all child Transfers created from the Master.

## Integration for Accounting Plug-in Improvements

The following changes has been made to the Integration for Accounting plug-in.

For version 1.0.0:

The Hidden property on the account line item will now be indicated on the “Post Account” functionality. The AccountItemId will now be appended with \_HIDDEN when an account line item is marked as hidden on the account.

The transaction code has been appended to the account line item ID for Consents and Correspondent matters like currently available for Bonds, Transfers and Developments.

For version 2.0.0:

A new version of the Integration for Accounting plug-in has been created for simplified, improved integration. Both versions are compatible with Lexis Convey.

A new Transaction Code column as well as a Hidden column is now available on the “Post Account” function for all matter types.

The Transaction Code will be mapped from the account line item in Setup. Custom, additionally added (Ad hoc) account items within the matter will be mapped with and empty or “user” Transaction Code.

The Hidden column will indicate if an account line item was marked as Hidden on the Account.



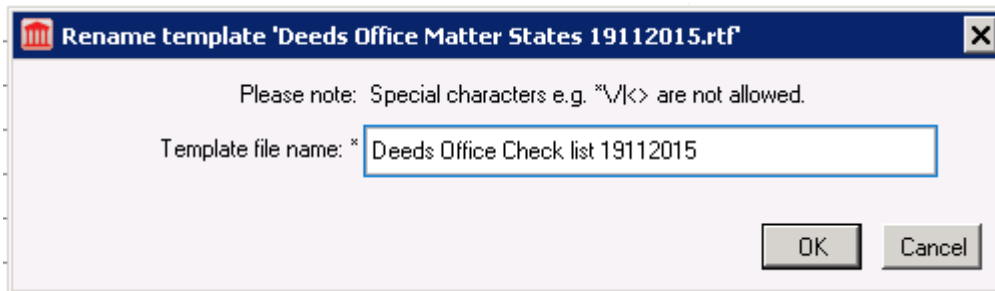
## Templates and Conditions

The usability, stability and the foundation of the Templates and Conditions features in Setup and across all matter types have been improved.

### Template Files

Improved usability around the renaming of template files.

Special characters are not allowed when renaming a template.



Extra spaces in front and at the end of the template file name will be trimmed when saved.

All template file names are now displayed with the file extension i.e. .rtf, .txt, etc.

Templates with the same template file name in the English and Afrikaans Language folders are now linked.

A new Linked Folder column has been added to indicate where the linked template is located.

English (BNDE)	
Filename	Link Folder
filter text	
Source: System (284 items)	
Account(1 Col Vat Separate).rtf	Afrikaans
Account(1 Col Vat Total only).rtf	Afrikaans
Account(2 Col Vat Amount and VAT).rtf	Afrikaans
Account(3 Col Vat Separate).rtf	Afrikaans
Account(Fees and Disbs).rtf	Afrikaans
Account.rtf	Afrikaans
AccountQuote.rtf	Afrikaans
AllEnd.rtf	Afrikaans
AllEndCor.rtf	Afrikaans
AlfidavitEnding.rtf	Afrikaans
AlfidavitEndingSpouse.rtf	Afrikaans
Agreement.rtf	
Application Form.rtf	
ApplicationVersion.rtf	Afrikaans
AppltoReg4(1)(b).rtf	Afrikaans
Appoint.rtf	Afrikaans
AuthorityComplInterestClause.txt	Afrikaans
AuthorityInterestClause.txt	Afrikaans
BEEDiscountConfirmationLetter.rtf	Afrikaans

A Right-click menu item “Go to linked template” has been added.

LetterToMortBondConnv.rtf	
LetterToMortgag	Go to linked template
LetterToMortLod	Copy template
LetterToMortReg	Filter
ListOfMortgagors	Copy text
ListOfMortnansrWithAuthPersonID.txt	

Deleting a template will prompt the user if any linked templates should be deleted as well.

The screenshot shows the LexisConvey interface with a menu bar (Import, Export, Edit, Revert, Delete) and a table of files. The table has columns for Filename, Link Folder, and Suite. Below the table, there are sections for 'Source: System (461 items)' and 'Source: User (3 items)'. The 'User' section lists three files: 'Agreement Conditions.rtf', 'Deed Conditions - Western Cape.rtf', and 'Deed Conditions.rtf', all with 'Transfers' as the suite. An error dialog box is overlaid on the interface, titled 'Lexis Convey', with a yellow warning icon. The message reads: 'Unable to rename 'Deed Conditions.rtf' to 'Deed Conditions - Western Cape.rtf'. A template with the filename 'Deed Conditions - Western Cape.rtf' already exists in this folder.' An 'OK' button is at the bottom right of the dialog.

Lastly, the usability around the Import functionality and importing of duplicate templates into the same folder has been improved.

## Templates: Copy from Existing

In Setup > Templates, the Copy from Existing functionality has been improved. The system now allows for multiple Templates to be copied from a folder location and imported by clicking Import > Copy from existing.

The screenshot shows the 'Import' menu in the LexisConvey interface. The menu is open, showing three options: 'Import new', 'Import over existing', and 'Copy from existing'.

The system will prompt to select the folder location of the templates to be copied from:

English

Import Export Edit Revert Delete

Filename	Link Folder	Suite
<i>filter text</i>	<i>filter text</i>	<i>filter text</i>
Source: System (461 items)		
15B(3)C AFFIDAVIT.RTF	Afrikaans	Transfers
42(2) Cert.RTF	Afrikaans	Transfers
Account (Fees Disb VAT).rtf	Afrikaans	Transfers
Account(AmountAndVAT).rtf	Afrikaans	Transfers
Account(VAT Debit Credit).rtf	Afrikaans	Transfers
Account(VATandAmount).rtf	Afrikaans	Transfers
Account.rtf		
AccountingOfficer's - Auditor'sAffidavit.rtf		
AccountQuote.rtf		
AffidavittoSection9(20).rtf		
AffidavittoSection9(20)Spouse.rtf		
Agreement - Agency.rtf	Afrikaans	
Agreement - Agent.rtf	Afrikaans	
Agreement.rtf	Afrikaans	
All Buyer Resolutions.RTF	Afrikaans	
All Resolutions.RTF	Afrikaans	
All seller affidavits.RTF	Afrikaans	
All seller Resolutions.RTF	Afrikaans	Transfers

Copy template

Select folder: \*

- Afrikaans
- Afrikaans\FastFill
- Afrikaans\Lookups
- Conditions
- Conditions\Divorces
- Conditions\Donations
- Conditions\New
- Conditions\Will
- English\FastFill
- English\Lookups
- Preambles
- Preambles\EUA

Once the folder is selected the system will prompt to select the templates to copy.

English

Import Export Edit Revert Delete

Filename	Link Folder	Suite
<i>filter text</i>	<i>filter text</i>	<i>filter text</i>
Source: System (461 items)		
15B(3)C AFFIDAVIT.RTF	Afrikaans	Transfers
42(2) Cert.RTF	Afrikaans	Transfers
Account (Fees Disb VAT).rtf	Afrikaans	Transfers
Account(AmountAndVAT).rtf	Afrikaans	Transfers
Account(VAT Debit Credit).rtf	Afrikaans	Transfers
Account(VATandAmount).rtf	Afrikaans	Transfers
Account.rtf		
AccountingOfficer's - Auditor'sAffidavit.rtf		
AccountQuote.rtf		
AffidavittoSection9(20).rtf		
AffidavittoSection9(20)Spouse.rtf		
Agreement - Agency.rtf		
Agreement - Agent.rtf		
Agreement.rtf		
All Buyer Resolutions.RTF		
All Resolutions.RTF		
All seller affidavits.RTF		
All seller Resolutions.RTF		
Allaffidavits.RTF		
App 4(1)(b) - Proclamation.rtf		
App 51(2) Insolvent Estate.rtf		
App 51(2) Lost Deed.rtf		
App 68(1) Lost Deed.rtf		
AppforTfImmovableProperty.RTF		

Copy template

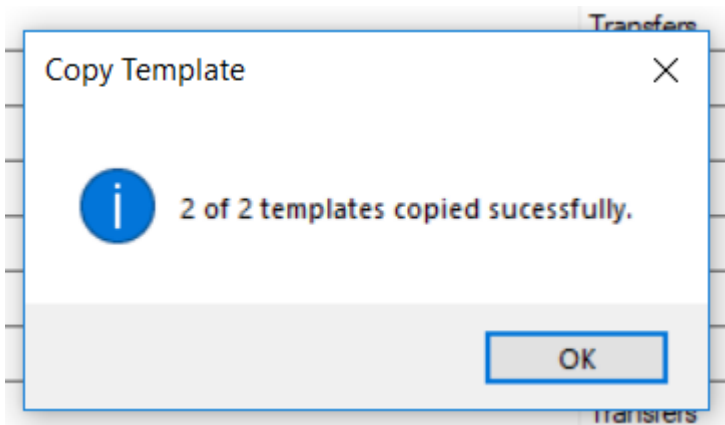
Select folder: \* Conditions

Select template: \*

- Agreement Conditions.rtf (English)
- SAMPLE HomeOwner's Condition.rtf (English)
- SAMPLE Usufruct Deed Condition - AFR.rtf (Afrikaans)
- SAMPLE Usufruct Deed Condition - ENG.rtf (English)
- SAMPLE Usufruct PA Condition - AFR.rtf (Afrikaans)
- SAMPLE Usufruct PA Condition - ENG.rtf (English)

OK Cancel

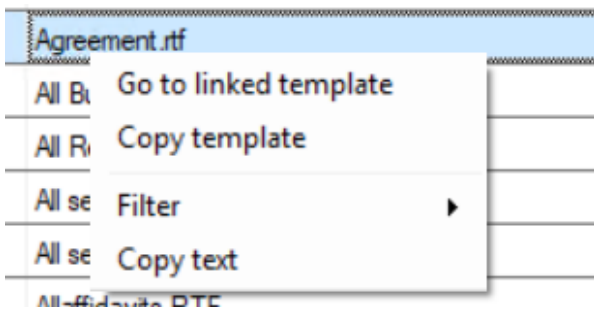
In this example both the *Agreement Conditions.rtf* and the *Sample Usufruct Deed Conditions – ENG.rtf* templates will be copied to the Transfers > Templates > English folder and added as User templates.



Source: User (2 items)	
Agreement Conditions.rtf	
SAMPLE Usufruct Deed Condition - ENG.rtf	

## Templates: Copy Template

A “Copy Template” right-click menu option is now available to copy a template into its the current location.



English				
Import	Export	Edit	Revert	Delete
Filename	Link Folder	Suite		
<i>filter text</i>	<i>filter text</i>	<i>filter text</i>		
Source: System (461 items)				
15B(3)C AFFIDAVIT.RTF	Afrikaans	Transfers		
42(2) Cert.RTF	Afrikaans	Transfers		
Account (Fees Disb VAT).rtf	Afrikaans	Transfers		
Account(AmountAndVAT).rtf	Afrikaans	Transfers		
Account(VAT Debit Credit).rtf				
Account(VATandAmount).rtf				
Account.rtf				
AccountingOfficer's - Auditor'sAffidavit.rtf				
AccountQuote.rtf				
AffidavittoSection9(20).rtf				
AffidavittoSection9(20)Spouse.rtf				
Agreement - Agency.rtf	Afrikaans	Transfers		
Agreement - Agent.rtf	Afrikaans	Transfers		
Agreement.rtf	Afrikaans	Transfers		
All Buyer Resolutions.RTF	Afrikaans	Transfers		
All Resolutions.RTF	Afrikaans	Transfers		
All seller affidavits.RTF	Afrikaans	Transfers		

**Copy Template** X

Please note: Special characters e.g. ~\|<> are not allowed.

Template file name:

“Copy Template” will create a copy of the selected template in the current folder location and will be added as a User template.

The new file name will default to ‘Copy -’, appended to the selected file name. No special characters will be allowed in the new file name.

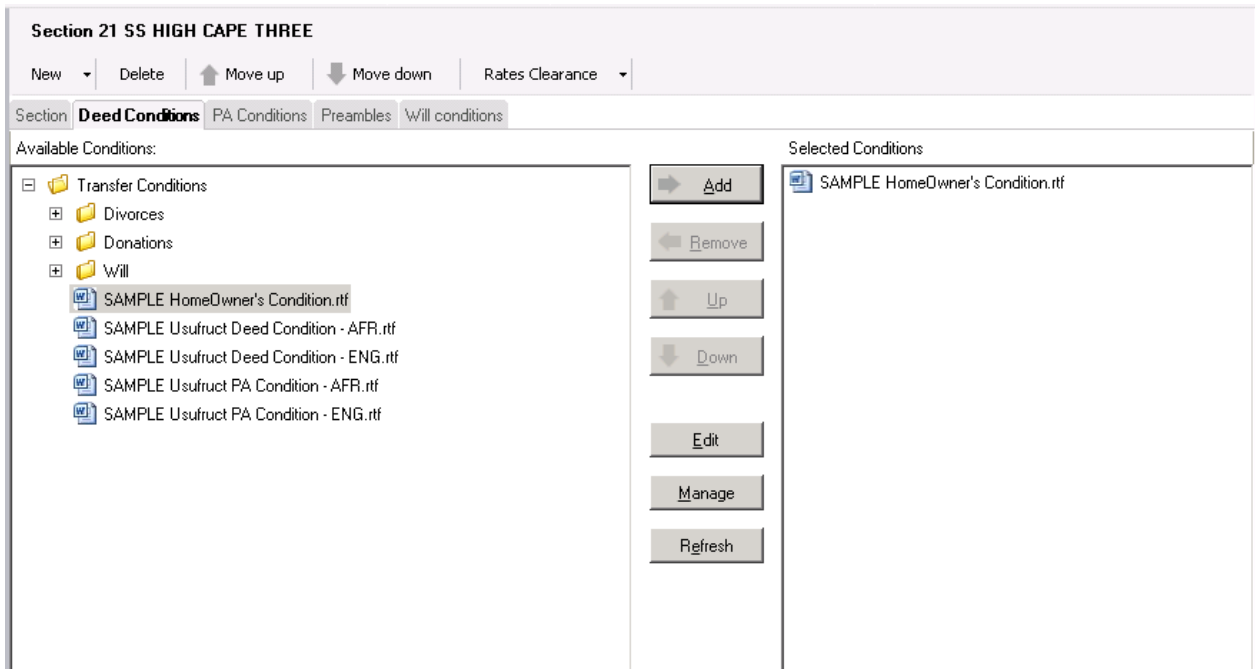
Transferor Resolution Section 112 and 115.rtf	Afrikaans	Transfers		
Transferor Sale in Execution Affidavit.RTF	Afrikaans	Transfers		
Transferor Special Power of Attorney - Notarial Deed.RTF	Afrikaans	Transfers		
Transferor Spouse FICA Affidavit.rtf	Afrikaans	Transfers		
Transferor Spouse Personal Affidavit.RTF	Afrikaans	Transfers		
Transferor Surviving Spouse Personal Affidavit.RTF	Afrikaans	Transfers		
Transferor Trustee Affidavit.RTF	Afrikaans	Transfers		
TransferorResolution.RTF	Afrikaans	Transfers		
TransferPaths.rtf	Afrikaans	Transfers		
TranslationPairs.txt				
TrustCertTransferee.RTF	Afrikaans	Transfers		
TrustCertTransferor.RTF	Afrikaans	Transfers		
VAT CLEARANCE.RTF	Afrikaans	Transfers		
VAT249NEWAttorneyUndertaking.RTF	Afrikaans	Transfers		
WaiverOfExtension.rtf	Afrikaans	Transfers		
YoursFaithfully.rtf	Afrikaans	Transfers		
Source: User (3 items)				
Agreement Conditions.rtf				
Agreement Phase 2.rtf				

**Copy Template** X

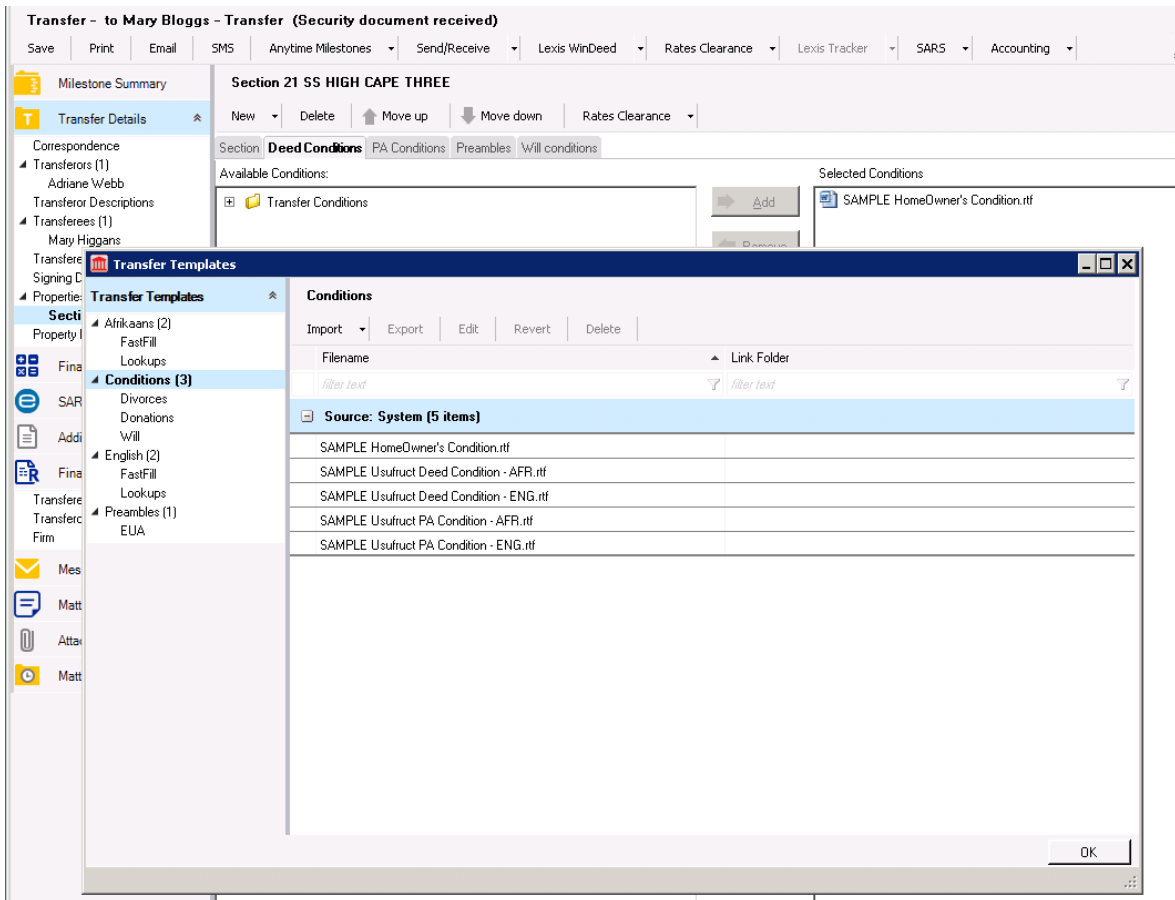
Successfully copied 'Agreement.rtf' to 'Agreement Phase 2.rtf'.

# In matter Conditions View functionality: Transfers and Developments

The Conditions View functionality for Transfers and Developments has been improved.



A new “Manage” button was added to directly manage the templates in Setup from within the matter.



## Setup: Matter > Print List

The 'Documents' tab have been renamed to '**Print List**' for Setup > Bonds, Setup > Transfers and Setup > Developments.

On the Print List tab, click on the 'New' button to add a document. Complete the Document details and select the Template file name as the Document Code.

Print List			
New	Delete	Revert	
Source	Group	Sequence	Description
<i>filter text</i>	<i>filter text</i>	<i>filter text</i>	<i>filter text</i>
USR	REPORTS		Fee Report 01
USR	REPORTS		Monthly Report - Selected Reference 1
USR	REPORTS		Monthly Report - Selected Reference01
USR	REPORTS		Sectional Scheme Report1
USR	REPORTS		Seifontein Vijoen Progress report
USR	LODGEMENT		Agreement Phase 3
USR			

Document Details	
Group: *	<input type="text"/>
Sequence:	<input type="text"/>
Description: *	<input type="text"/>
Criteria:	<input type="text"/>
Setup command:	<input type="text"/>
Language:	<input type="text"/>
Number of copies:	<input type="text" value="1"/>
Item name:	<input type="text"/>
Collection name:	<input type="text"/>
Document code (excluding .rtf):	<input type="text"/>

Start typing in the 'Document Code' field to bring up a list to select from Template files or complete a new document code to associate to a template at a later stage.

**Print List**

New | Delete | Revert

Source	Group	Sequence	Description
<i>filter text</i>	<i>filter text</i>	<i>filter text</i>	<i>filter text</i>
USR	REPORTS		Fee Report 01
USR	REPORTS		Monthly Report - Selected Reference 1
USR	REPORTS		Monthly Report - Selected Reference01
USR	REPORTS		Sectional Scheme Report1
USR	REPORTS		Serfontein Vijoen Progress report
USR	LODGEMENT		Agreement Phase 3
USR	LODGEMENT		Agreement Phase 2

---

Group: \* Lodgement 1200

Sequence:

Description: \* Agreement Phase 2

Criteria:

Setup command:

Language: Transfer.TransferorLanguage

Number of copies: 1

Item name:

Collection name:

Document code (excluding .rtf):  ⓘ

Start typing to find templates located in the 'English' and 'Afrikaans' tabs

**Print List**

New | Delete | Revert

Source	Group	Sequence	Description
<i>filter text</i>	<i>filter text</i>	<i>filter text</i>	<i>filter text</i>
USR	REPORTS		Fee Report 01
USR	REPORTS		Monthly Report - Selected Reference 1
USR	REPORTS		Monthly Report - Selected Reference01
USR	REPORTS		Sectional Scheme Report1
USR	REPORTS		Serfontein Vijoen Progress report
USR	LODGEMENT		Agreement Phase 3
USR	LODGEMENT		Agreement Phase 2

---

Group: \* Lodgement 1200

Sequence:

Description: \* Agreement Phase 2

Criteria:

Setup command:

Language: Transfer.TransferorLanguage

Number of copies: Agreement - Agency  
Agreement - Agent

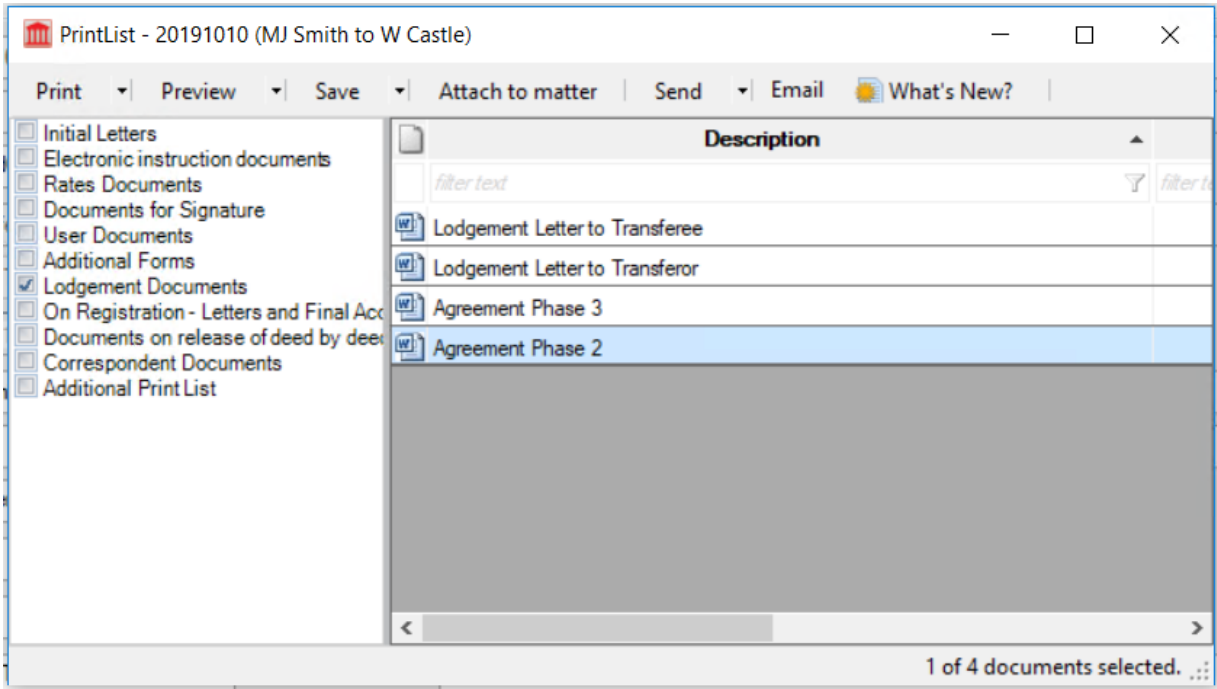
Item name: Agreement Conditions - Phase 2  
Agreement Conditions

Collection name: Agreement  
Agreement Conditions - Phase 3

Document code (excluding .rtf): Agree ⓘ



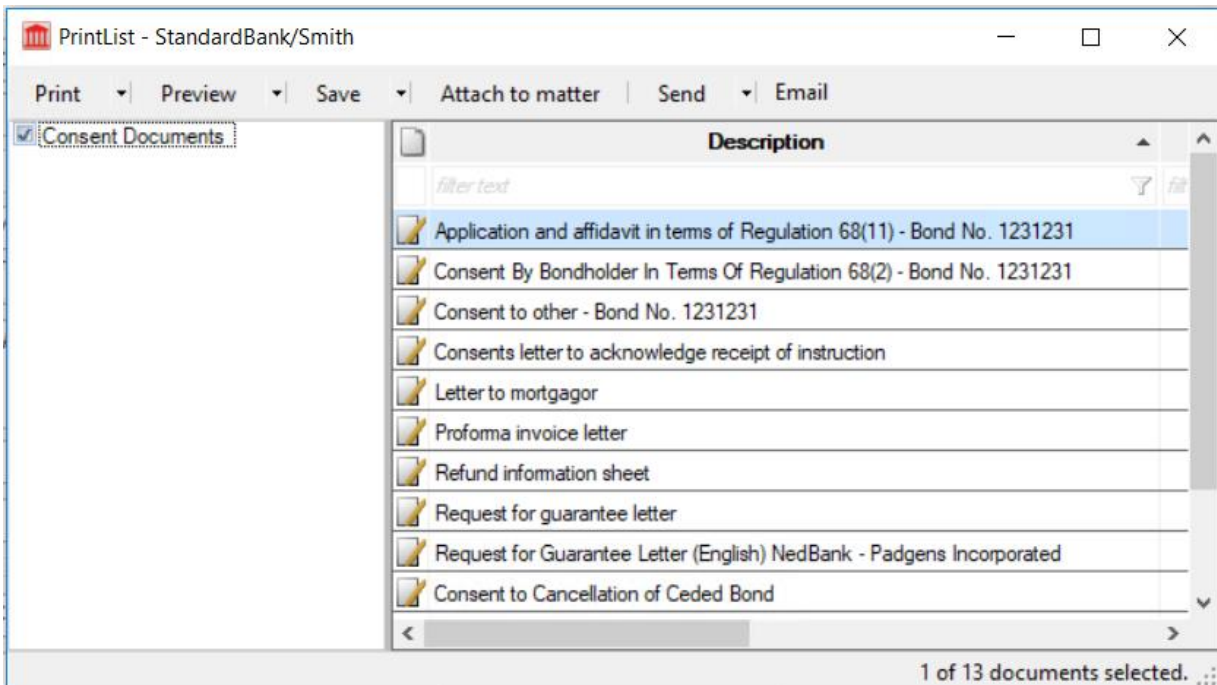
The newly added document will now be available in the print list:



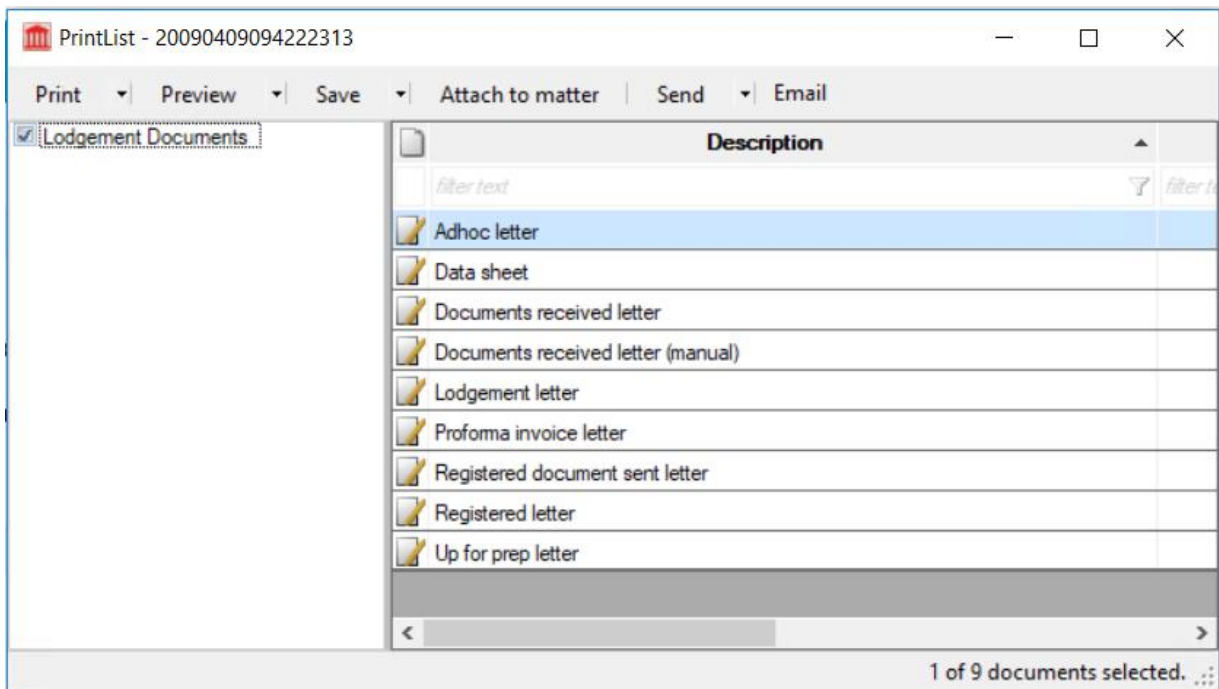
## Consents and Correspondent Matters: New Print List

A **new print list** has been created for Consents and Correspondent Matters and can be accessed by clicking on the 'Print' button on the matter.

Consents:



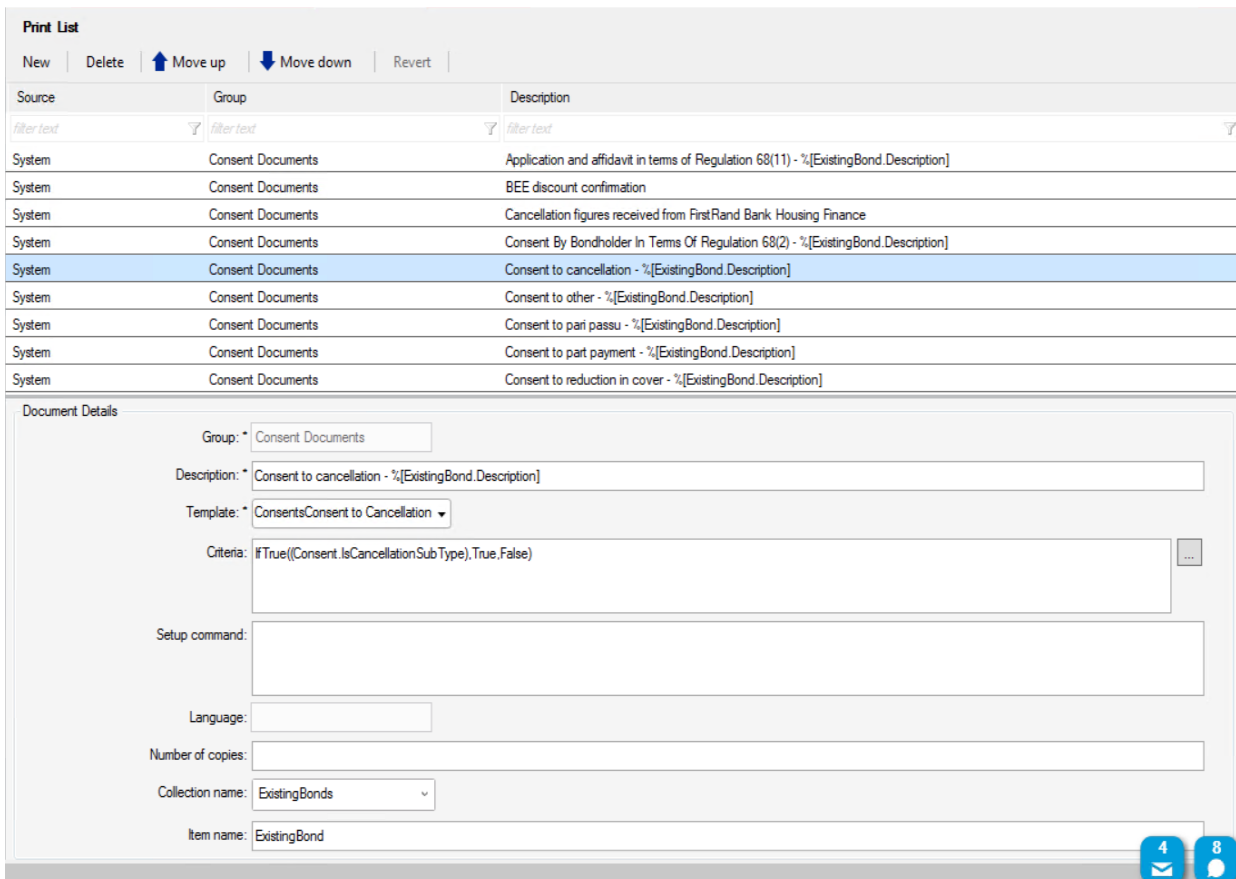
Correspondent Matters:



In Setup: A new 'Print List' tab has been added to Setup > Consents and Setup > Correspondent Conveyancing in order to configure the print list for the matter type.

Setup > Consents:

All documents will now belong to the newly added group called 'Consent Documents'. The Document details can be completed for each document, including any specific criteria for when the document should schedule in the print list.



Setup > Correspondent Conveyancing:

All documents will now belong to the newly added group called 'Lodgement Documents'. The Document details can be completed for each document, including any specific criteria for when the document should schedule in the print list.

**Print List**

New | Delete | Move up | Move down | Revert

Source	Group	Description
<i>filter text</i>	<i>filter text</i>	<i>filter text</i>
System	Lodgement Documents	Adhoc letter
System	Lodgement Documents	Data sheet
System	Lodgement Documents	Documents received letter
System	Lodgement Documents	Documents received letter (manual)
System	Lodgement Documents	Held over on prep letter
System	Lodgement Documents	Lodgement letter
System	Lodgement Documents	Profoma invoice letter
System	Lodgement Documents	Registered document sent letter
System	Lodgement Documents	Registered letter

**Document Details**

Group: Lodgement Documents

Description: Documents received letter

Template: CorrespondentConveyancingDocuments Received Letter

Criteria: Correspondent.IsElectronicCorrespondentMatter AND Correspondent.LodgementDocumentsReceived

Setup command:

Language:

Number of copies:

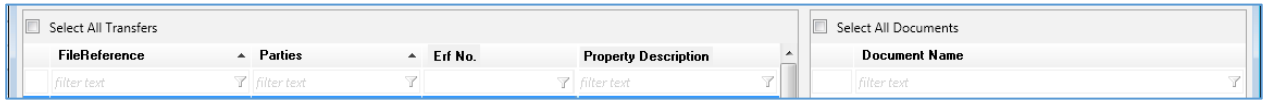
Collection name:

Item name:

4 8

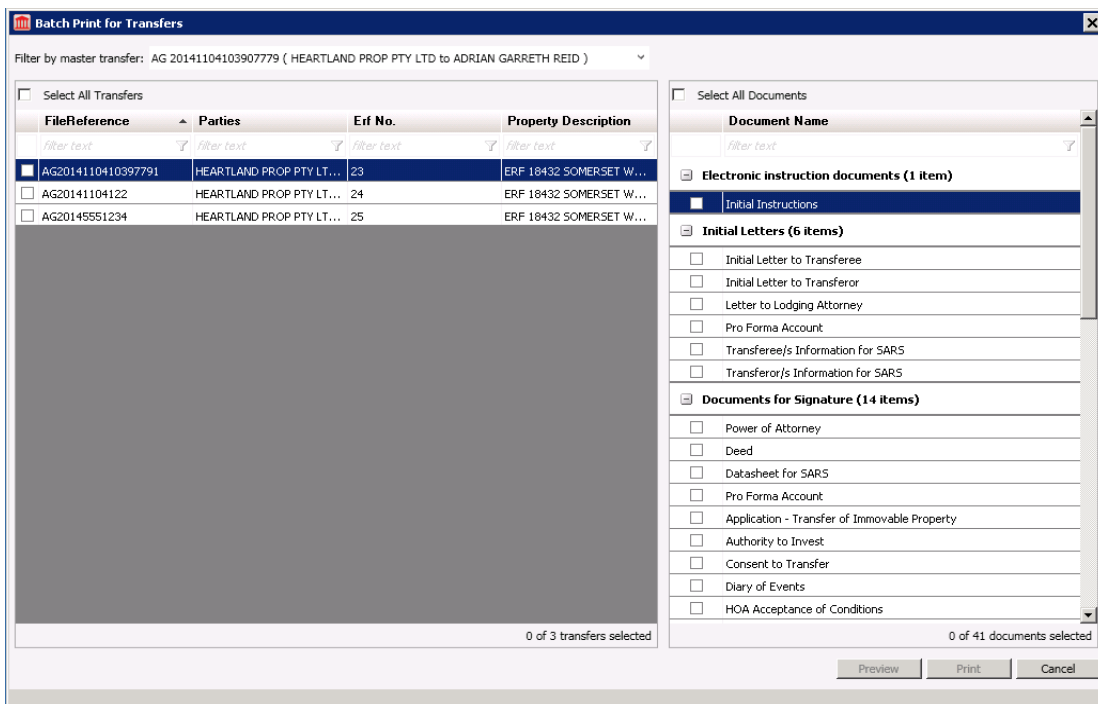
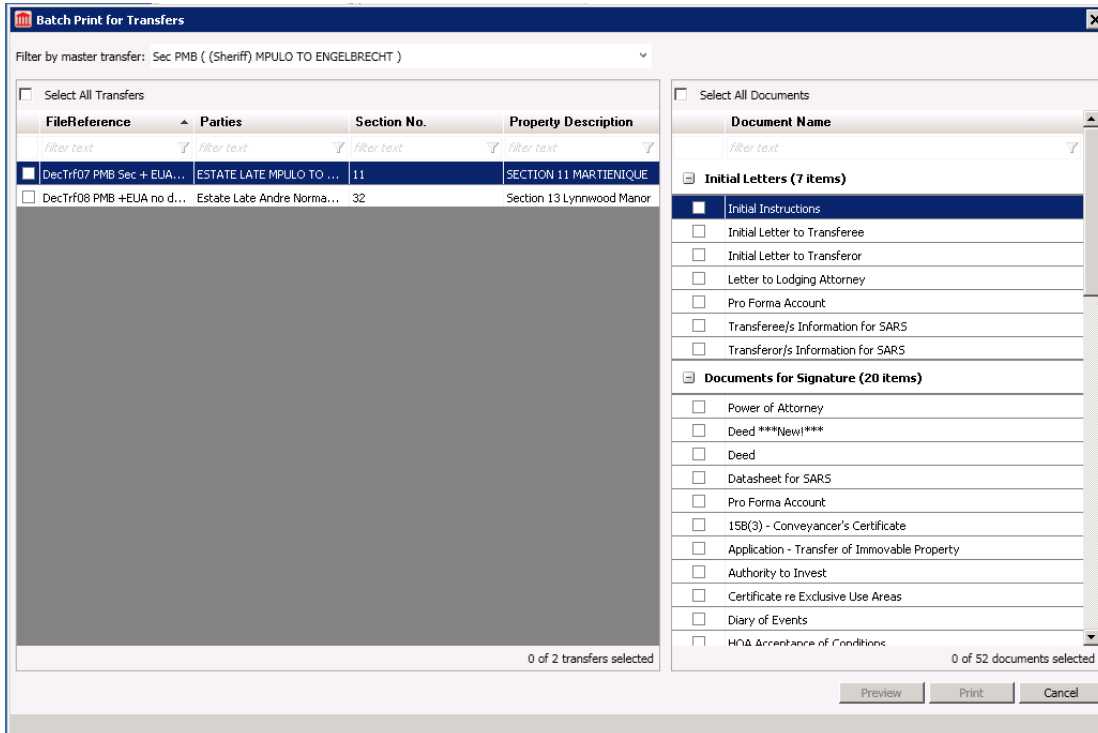
## Batch Print Improvements

The Batch Print functionality on Transfers and Affordable Housing Transfers has been improved.



A new column has been added for Erf No. and Section No. depending on the Property type of the Transfer.

The Transfers can now be sorted on any column available in the grid.



## Correspondent Conveyancing Module Improvements

The usability of the Correspondent Matters has been improved by logically grouping the relevant fields for each Correspondent Matter Sub type.

The following grouping of fields are now available:

- Instructing firm details
- Matter details
- Institution details
- Financial details \*NEW


### Bonds Matter Details View:

Matter Details	
Instructing firm details	
Firm name: BJ VAN DER WALT & SCHOEMAN	Instructing file reference: LW/R287585203500100010004
Contact person: Supervisor	Cell number:
Tel number: 0216589700	Email address: no-reply@lexisnexis.co.za
Fax number: 0216589701	
Name and address: Chandre Test Firm	
Language of matter: English	
Matter details	
Matter type: Correspondent matter	Our reference: * AdHoc
Milestone process: Electronic Lodgement Matter	Our branch: * Parklands - JT
File reference: * 20190603191908997	Accounting reference:
Date received: 2019/06/03	Expected registration date: <input type="checkbox"/> 2019/10/08
Parties: MR. A AZARITA AND MR. A AAMPELIO / Standard Bank Limited	Short property description: ERF 958 ESHOWE
Cause of action: New	Property type:
Deeds Office: Cape Town	DO tracking number: <input type="text"/> DOTS
Comments:	
Institution details	
Financial institution name: Standard Bank Limited	Institution branch name: Heerengracht
Loan account number: 530006243	
Debt type: Home Loan	Rank of bond: <input type="text"/> 1
Financial details	
Registered bond amount: 5800000.00	Additional sum: 30000.00
Tariff: 53510.00	Lodging agent fee percentage: 15.00%
	Lodging agent fee: 8026.50

## Consent Matter Details View:

Matter Details	
Instructing firm details	
Firm name: BJ VAN DER WALT & SCHOEMAN	Instructing file reference: acb00564
Contact person: Supervisor	Cell number:
Tel number: 0216589700	Email address: no-reply@lexisnexis.co.za
Fax number: 0216589701	
Name and address: Chandre Test Firm	
Language of matter: English	
Matter details	
Matter type: Correspondent matter	Our reference: * AdHoc
Milestone process: Electronic Lodgement Matter	Our branch: * Parklands - JT
File reference: * 20190604131928284	Accounting reference:
Date received: 2019/06/04	Expected registration date: <input type="checkbox"/> 2019/10/08
Parties: MR HF JOHNSTONE AND MRS RK JOHNSTONE	Short property description: ERF 6548 NEWLANDS
Cause of action: Release of property	Property type: Conventional
Deeds Office: Johannesburg	DO tracking number: <input type="text"/> DOTS
Comments:	
Institution details	
Institution holding title deed:	Institution branch name:
Branch correspondence reference:	Loan account number:
Financial details	
Tariff: 2810.00	Lodging agent fee percentage: 15.00%
	Lodging agent fee: 421.50

## Transfer Matter Details View:

Matter Details	
Instructing firm details	
Firm name: BJ VAN DER WALT & SCHOEMAN	Instructing file reference: Fees-1
Contact person: Supervisor	Cell number:
Tel number: 0216589700	Email address: no-reply@lexisnexis.co.za
Fax number: 0216589701	
Name and address: Chandre Test Firm	
Language of matter: English	
Matter details	
Matter type: Correspondent matter	Our reference: * AdHoc
Milestone process: Electronic Lodgement Matter	Our branch: * Parklands - JT
File reference: * 20190604113250015	Accounting reference:
Date received: 2019/06/04	Expected registration date: <input type="checkbox"/> 2019/10/08
Parties: 	Short property description: ERF 1 CAPE TOWN
Cause of action: Transfer	Property type: Conventional
Deeds Office: Cape Town	DO tracking number: <input type="text"/> DOTS
Comments:	Reason for action:
Financial details	
Purchase price: 50000.00	Lodging agent fee percentage: 15.00%
Tariff: 5000.00	Lodging agent fee: 750.00

## Other Lodgement Matter Details View:

Matter Details	
Instructing firm details	
Firm name: BJ VAN DER WALT & SCHOEMAN	Instructing file reference:
Contact person:	Cell number:
Tel number:	Email address: no-reply@lexisnexis.co.za
Fax number:	
Name and address:	
Language of matter: Afrikaans	
Matter details	
Matter type: Antenuptial Contract	Our reference: * RiteshR
Milestone process: Other Lodgement Matter	Our branch: * Parklands - JT
File reference: * acb00137	
Date received: 2010/09/10	Expected registration date: <input type="checkbox"/> 2019/10/08
Parties: RYAN MANUEL	Short property description: ERF 13 A CALMORE
Deeds Office: Cape Town	DO tracking number: <input type="text"/> DOTS
Comments:	
Financial details	
Tariff: 0.00	Lodging agent fee percentage: 15.00%
	Lodging agent fee: 0.00

A further improvement to the Instructing Firm details has been implemented by allowing a Contact Person to be captured for the Instructing Firm.

A contact person can be added in Setup for each Attorney firm.

**Firm Settings** **De Lange Inc**

New | Delete  Include inactive items?

Name	Telephone Number	Cell Number	Fax Number	Email Address
[New Contact]				
Carol Zayne	0825554789	0825554789		CarolZ@DeLange.com
Jenny De Villiers	0823336985	0823336985		JennyD@DeLange.com

**Attorney Contact Details**

Name: \*

Tel Number:

Cell Number:

Fax Number:

Email Address:

Address:

For manually created Correspondent Matters the Contact Person will be available for selection on the matter.

The details of the selected Contact Person will populate from the data captured in Setup.

**Matter Details**

Instructing firm details

Firm name: De Lange Inc

Instructing file reference:

Contact person:

Cell number:

Tel number: Jenny De Villiers

Email address: no-reply@lexisnexis.co.za

Fax number:

Name and address:

Language of matter: English

**Matter Details**

Instructing firm details

Firm name: De Lange Inc

Instructing file reference:

Contact person: Jenny De Villiers

Cell number: 0823336985

Tel number: 0823336985

Email address: JennyD@DeLange.com

Fax number:

Name and address:

Language of matter: English



The Contact person can be manually captured on the matter if the required Contact person is not available in the list or not required to be added in setup.

**Matter Details**

Instructing firm details

Firm name: De Lange Inc

Contact person: Alice Walker

Tel number: Carol Zayne  
Jenny De Villiers

Fax number:

Name and address:

Language of matter: English

Instructing file reference:

Cell number: 0823336985

Email address: JennyD@DeLange.com

The Contact person and Firm name will automatically populate for electronically instructed Correspondent matters.

**Matter Details**

Instructing firm details

Firm name: Justin Attorneys

Contact person: Tania May

Tel number: 0216589700

Fax number:

Name and address: Korbitec  
P O Box 243  
Newlands  
7725

Language of matter: English

Instructing file reference: A000224

Cell number:

Email address: no-reply@lexisnexis.co.za

Matter details

Matter type: Correspondent matter

Milestone process: Electronic Lodgement Matter

File reference: \* 612277722800100010004

Date received: 2019/10/17

Parties: JOINT VAN DER MERWE MR EA & FERREIRA  
MISS ME / ABSA

Cause of action: New

Deeds Office: Bloemfontein

Comments:

Our reference: \* AdHoc

Our branch: \* Belville - LS

Accounting reference:

Expected registration date:  2019/10/19

Short property description: Unit 11, SS WENDY GARDENS

Property type:

DD tracking number: DOTS

Institution details

Financial institution name: ABSA

Loan account number: 0000008059352030001

Debt type: Home Loan

Institution branch name: Hout Bay

Rank of bond: 1

Financial details

Registered bond amount: 160000.00

Tariff fee: 6540.00

Additional sum: 32000.00

Lodging agent fee percentage: 5.00%

Lodging agent fee: 327.00

The Instructing firm and Contact person details will be sent through to Lexis DeedTracker upon Send/Received.

## Multiple DOTS numbers per matter type

### Lexis DeedTracker/Lexis Convey Integration: Multiple DOTS Numbers per Matter

Lexis Convey now allows for **multiple** Deeds Office Tracking Numbers to be captured for a single matter to facilitate improved integration with Lexis DeedTracker.

Each additional DOTS number will be processed as a separate matter in Lexis DeedTracker, inheriting the necessary information from the parent matter in Lexis Convey. Each additional DOTS number matter has its own DeedTracker status which will be returned to Lexis Convey and displayed accordingly. All related matters are displayed on the Matter Details page in Lexis DeedTracker.

#### Deeds Office Matter Details

Additional DOTS Numbers Add batch matters Notification History Scanner History

Matter Details		Additional DOTS Numbers		
Matter Type	Bond	Matter Type	DOTS Number	Deed Tracker Status
Correspondent matter	<input type="checkbox"/>	<b>This Matter</b>		
Date Received	08/08/2019	B	080000000000	Lodged
		<b>Related Matters</b>		
		T	080000000001	To Lodge On
		T	080002000001	Held Over

### Transfers: Additional Forms

Each Additional Form captured on the Transfer Details tab needs to be registered in the Deeds Office. A DOTS number and a DeedTracker Status field has been added for each Additional Form.

Additional Form	DOTS Number	DeedTracker Status	Notes
Application ito 51(2) (Lost Title Deed)	080012345690		Awaiting confirmation.

Clicking on the New button:

**Add Additional Form**

Additional Form:

DOTS Number:

DeedTracker Status:

Notes:

The required Additional Form can be selected from the list and the necessary DOTS Number and Notes can be completed.

The additional DOTS numbers are sent to Lexis DeedTracker upon Send/Receive. The DeedTracker Status will be returned from Lexis DeedTracker once scanned in the Deeds Office. Lexis Convey will check every 3 minutes if an updated DeedTracker Status is available to download.

Additional Forms

Additional Forms:

Additional Form	DOTS Number	DeedTracker Status	Notes
Application ito 51(2) (Insolvent Estate Deed)	080012345678	To lodge on	this is a note
Application ito 51(2) (Lost Title Deed)	080012345677	Lodged	
Section 62(3) - Public Auction	080012345777	Lodged	
Application ito 43(1) Certificate of Registered Title (Subdivision)	080012345888	Lodged	

## Bonds: Additional Forms

The DOTS number and DeedTracker Status implementation per Additional Form for Bonds is similar to Transfers.

Add an Additional Form on the Bond Details tab.

The DeedTracker Status will be displayed once scanned in the Deeds Office.

Additional Forms			
Additional Forms: <input type="button" value="New"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>			
Additional Form	DOTS Number	DeedTracker Status	Notes
Application ito Section 4(1)(b)	070012345678	To lodge on	This is a note
Regulation 68(1) - Bond G20170419141827676	070012345655	Lodged	Another note
Regulation 68(8) - Bond G20170419141827676	070014325678	Prep (with notes)	A note

## Developments: Additional Forms

The Deeds Registry field has been moved to the General group box on the Development Details tab and a DO Tracking number has been added. The fields are available when 'Open Township in Deeds Office' is selected.

**Development Details**

General

File reference: \*

Development: \*

Phase:

Accounting reference:

Our reference: \*

Developer: \*

Milestone process:

Our branch: \*

Date received:

Estimated registration date:

Language:

Property type:

Open register in Deeds Office?

Deeds registry:  DO tracking number:

The DO tracking number will be available on each property for the Development, including Erven, Sections and EUAs.

Section number:

Flat number:

Extent:

Tenant name:

Tenant address:

Conditions:

DO tracking number:

The DO tracking number has been added to the grid view of the property.

**Erven**

New Delete Move up Move down

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

Erf No	Extent	Units	DO Tracking Number
1	11	Square metres	070012345678
2	200	Square metres	070012345678

**Sections**

New Delete Move up Move down

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

Section No	Rat No	Extent	Tenant Name	DO Tracking Number
1	1	100	Angle	070012345678
2	2	300	Brad	070012345699

**EUAs**

New Delete Move up Move down

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

EUA No	Extent	Related Section	Description	DO Tracking Number
1	10	1	Garage	070012345678
2	40	1	Garden	070012345655

The DOTS number and DeedTracker Status implementation per Additional Form for Developments is similar to Bonds and Transfers.

On the Development Details tab; Add an Additional Form:

**Additional Forms**

Additional Forms: New Edit Delete

Additional Form	DOTS Number	DeedTracker Status	Notes
Application ito Section 4(1)(b)	070012345678		
Regulation 68(1)	070012345679		This is a note

Development matters are not supported on Lexis DeedTracker as yet but will be available in future. The DeedTracker Status column will remain empty until such time.

## Consents: Existing Bonds

The Deeds Office Tracking number on the Consent Details tab has been removed to allow for multiple DOTS numbers per bond to be cancelled.

Each Existing Bond on a Consent matter will now have a DO tracking number and a DeedTracker Status field.

The additional DOTS numbers are sent to Lexis DeedTracker upon Send/Receive. The DeedTracker Status will be returned from Lexis DeedTracker once scanned in the Deeds Office. Lexis Convey will check every 3 minutes if an updated DeedTracker Status is available to download.

The screenshot shows a web interface for bond management. At the top, it displays the bond number: **(Bond No: 123/2009 )**. Below this are two buttons: **New** and **Delete**. The main section is titled **Bond Details** and contains several input fields: **Bond holder:** a dropdown menu showing **ABSA BANK - NEULANDS**; **Bond number:** a text box containing **123/2009**; **Registered bond amount:** a text box containing **1000000.00**; **Additional sum:** a text box containing **50000.00**; **Passed by:** a large empty text area with a vertical scrollbar and a refresh icon; **DO tracking number:** a text box with a **DOTS** button next to it; and **DeedTracker Status:** an empty text box.

## Lodgement Batch

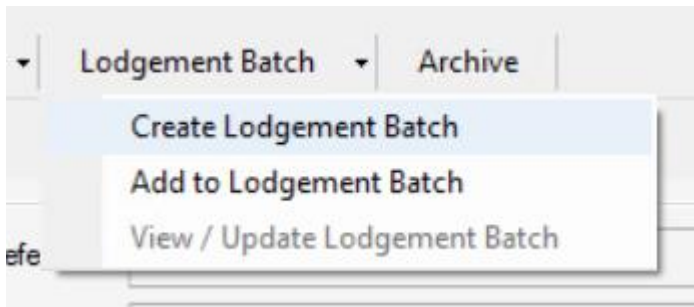
New functionality has been added for Correspondent Conveyancing to create and manage a batch of lodgement matters to be registered in the Deeds Office.

### Creating a Lodgement Batch

A Lodgement Batch can be created from a Correspondent Matter by clicking on the Lodgement Batch button inside the matter or from the Correspondent Matter view on the Matter List.

Alternatively, a Lodgement Batch can be created by selecting all the applicable Correspondent Matters from the Correspondent Matter view on the matter list, not currently in a batch, and selecting the 'Create Lodgement Batch' option on the Lodgement Batch button dropdown.

In the same way Correspondent Matters can be added to a batch by selecting the 'Add to Lodgement Batch' option.



**Create Lodgement Batch**

Batch Summary

Batch reference: 531685758000100010004      No. of items in batch: 3

Number of matters to add: 2      Add      Deeds Office: Bloemfontein

Remove

File Reference	Matter Subtype	Parties	DO Tracking No
531685758000100010004	Bond	JOINT VAN DER MERWE MR EA & FERREI...	
531685758000100010004		JOINT VAN DER MERWE MR EA & FERREI...	
531685758000100010004		JOINT VAN DER MERWE MR EA & FERREI...	

File reference: \* 531685758000100010004

Matter subtype: \*

Parties: \* JOINT VAN DER MERWE MR EA & FERREIRA MISS ME / ABSA

DO tracking no:

Create Lodgement Batch      Cancel

The Lodgement Batch View consists of the following elements:

**Batch Summary:**

Batch Summary

Batch reference: 317623752400100010004      No. of items in batch: 4

Number of matters to add: 0      Add      Deeds Office: Cape Town

- *Batch reference:*
  - The Lodgement Batch reference will default to the File Reference of the first matter in the batch and can be edited.
  - All matters with same Batch reference and File reference will be identified as a batch in Lexis DeedTracker.

Batch Reference: Smith and Strauss 191002      No. of items in batch: 1

Number of matters to add:      All matters with same batch reference and file reference will be identified as a batch in DeedTracker

- *No. of items in batch:*

- Indicates the number of items in the Lodgement Batch.
- *Number of matters to add:*
  - Indicates the number of matters to create for the Lodgement Batch in addition to the first Correspondent Matter item.
- *Add:*
  - The specified number of items will be added to the Lodgement Batch grid and any additional information can be completed.
- *Deeds Office:*
  - The Deeds Office where the Correspondent Matters will be registered. The Deeds Office will default from the first item and the batch and will be applied to all matters in the batch when created.

### **Lodgement Batch Items Grid:**

The first item in the grid, is the Correspondent matter the Lodgement Batch is being created from and will be added to the grid by default.

The File reference, Matter subtype, Parties and DO tracking number will be displayed for each item in the Lodgement Batch.

Buttons:

- *Remove:*
  - Removes the selected item from the Lodgement Batch grid.

Lodgement Batch Item Details:

The following fields are available to complete:

- File reference
  - The File reference for all items will be defaulted to the first Correspondent Matter's File reference.
- Matter subtype
  - Bond
  - Consent
  - Other
  - Transfer
- Other matter type
  - Only available when Matter subtype of 'Other' is selected.



number of matters to add:	
e	Application and Consent to Section 40(5)(a)
	Application for Endorsement to Recordal Section 20 of the Alienation of Land Act
	Application for Endorsement to Section 16 of 1947
	Application for Endorsement to Section 45 (2)
	Application for Endorsement to Section 45(1)
	Application for Endorsement to Section 45(bis)
	Application for Endorsement to Section 57
420223	Application to Open STR
	Certificate of Consolidated Title (Section 40)
	Certificate of Real Right
	Certificate of Registered Title (Section 43)
	Certificate of Sectional Registered Title
	Consent by HomeOwners Association
	Consent to Section 57 application
	Form W
	General Plan
	General Power of Attorney
File Reference: *	Newly added fee
Matter Subtype: *	Notarial Deed of Cession
	Notarial Deed of Habitatio
Other Matter Type: *	Notarial Deed of Cession

- Parties
  - The Parties field will be defaulted from the Parties field of the first Correspondent Matter and can be changed to apply to the specific item.
- DO tracking no.
  - Available to complete for each item in the Lodgement Batch.

**Create Lodgement Batch Button:**

Clicking on the Create Lodgement Batch button will create one matter per grid line item as per the data provided.

The newly created Correspondent Matters are now part of a batch and can be located and accessed from the Correspondent Matters View on the Matter List.

**Create Lodgement Batch**

Batch Summary

Batch reference: 317623752400100010004      No. of items in batch: 4

Number of matters to add: 0      Add      Deeds Office: Cape Town

Remove

File Reference	Matter Subtype	Parties	DD Tracking No
317623752400100010004	Bond	JOINT VAN DER MERWE MR EA & FERREI...	
612277722800100010004	Transfer	JOINT VAN DER MERWE MR EA & FERREI...	
840804651600100010004	Consent	JOINT VAN DER MERWE MR EA & FERREI...	
236327845200100010004	Other - Section 4(1)(b) application	JOINT VAN DER MERWE MR EA & FERREI...	

File reference: \* 236327845200100010004

Matter subtype: \* Other

Other matter type: \* Section 4(1)(b) application

Parties: \* JOINT VAN DER MERWE MR EA & FERREIRA MISS ME / ABSA

DD tracking no:

Create Lodgement Batch      Cancel

**Lodgement Batch created**

4 Lodgement Matter(s) created for batch 317623752400100010004. These matters can be accessed from the Correspondence matter list view.

OK

The Lodgement Batch reference will now be displayed on the Correspondent Matter's Matter details.

**Matter details**

Matter type: Notarial Deed of Cession

Milestone process: Other Lodgement Matter

File reference: \* 20190920094853934

Lodgement Batch Reference: Smith and Strauss 191002

Date received: 2019/09/23

Parties: to Mary Bloggs

Deeds Office: Cape Town

The Lodgement Batch will be seeded to Lexis DeedTracker and updated upon Send/Receive.

## View/Update Lodgement Batch

Select 'View/Update Lodgement Batch' option on Lodgement Batch button dropdown to view or update any items in the current batch.

The screenshot shows a software window titled "Update Lodgement Batch". At the top, there is a "Batch Summary" section with the following fields:

- Batch reference: 317623752400100010004
- No. of items in batch: 4
- Number of matters to add: 0 (with an up/down arrow and an "Add" button)
- Deeds Office: Cape Town (dropdown menu)

Below the summary is a "Remove" button and a table with the following columns: File Reference, Matter Subtype, Parties, and DO Tracking No.

File Reference	Matter Subtype	Parties	DO Tracking No
236327845200100010004	Other - Section 4(1)(b) application	JOINT VAN DER MERWE MR EA & FERREI...	800123456778
840804651600100010004	Consent	JOINT VAN DER MERWE MR EA & FERREI...	
612277722800100010004	Transfer	JOINT VAN DER MERWE MR EA & FERREI...	
317623752400100010004	Bond	JOINT VAN DER MERWE MR EA & FERREI...	

Below the table is a detailed view of a selected item with the following fields:

- File reference: \* 236327845200100010004
- Matter subtype: \* Other (dropdown menu)
- Other matter type: \* Section 4(1)(b) application (dropdown menu)
- Parties: \* JOINT VAN DER MERWE MR EA & FERREIRA MISS ME / ABSA
- DO tracking no: 800123456778 (with a yellow warning icon)

At the bottom right, there are two buttons: "Update Lodgement Batch" and "Cancel".

Additional items can be added to the batch by increasing the 'No. of matters to add' and clicking 'Add'.

**Update Lodgement Batch**

Batch Summary

Batch reference: 317623752400100010004 No. of items in batch: 4

Number of matters to add: 2 Add Deeds Office: Cape Town

Remove

File Reference	Matter Subtype	Parties	DO Tracking No
236327845200100010004	Other - Section 4(1)(b) application	JOINT VAN DER MERWE MR EA & FERREI...	
840804651600100010004	Consent	JOINT VAN DER MERWE MR EA & FERREI...	
612277722800100010004	Transfer	JOINT VAN DER MERWE MR EA & FERREI...	
317623752400100010004	Bond	JOINT VAN DER MERWE MR EA & FERREI...	

File reference: \* 236327845200100010004

Matter subtype: \* Other

Other matter type: \* Section 4(1)(b) application

Parties: \* JOINT VAN DER MERWE MR EA & FERREIRA MISS ME / ABSA

DO tracking no:

Update Lodgement Batch Cancel

Existing Lodgement Batch items, including the Batch reference can be edited and the DO tracking number can be completed.

Existing Lodgement Batch items can be removed from the batch. Please note: This will only remove the matter from the batch and will not delete the matter.

## Managing the batch of Lodgement matters

### Matter List:

The Lodgement Batch reference has been made available for customisation on the 'Correspondent Matter' matter list view. The matter list can be grouped by this column as well.

**Matter List Settings**

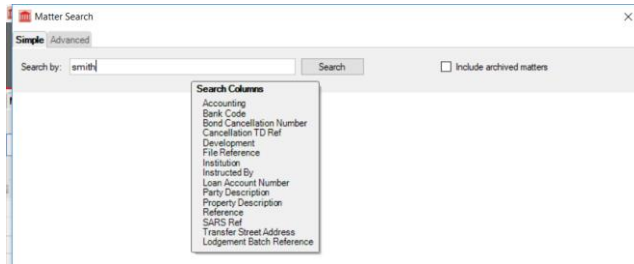
Customise matter list: Correspondent Matters Customise

Select Columns

Excluded Columns:	Included Columns:
Account Number	Property Hub alert
Archive Reference	Pending Messages
Batch	Info
Cause of Action	State
Contact Person	Type
Date Archived	Sub Type
DeedTracker Status	File Reference
Development	Our Reference
DOT Number	Parties
Electronic Reference	Short Property Description
Expected Registration Date	Instructed By
Last Action Date	Date Received
Last Comment	Deeds Office
Last Movement Date	Lodgement Batch Reference
Linked	
Listing Agency	

## Matter Search:

The Lodgement Batch reference has been added as a search option for the Simple and Advance Matter Search functionality.



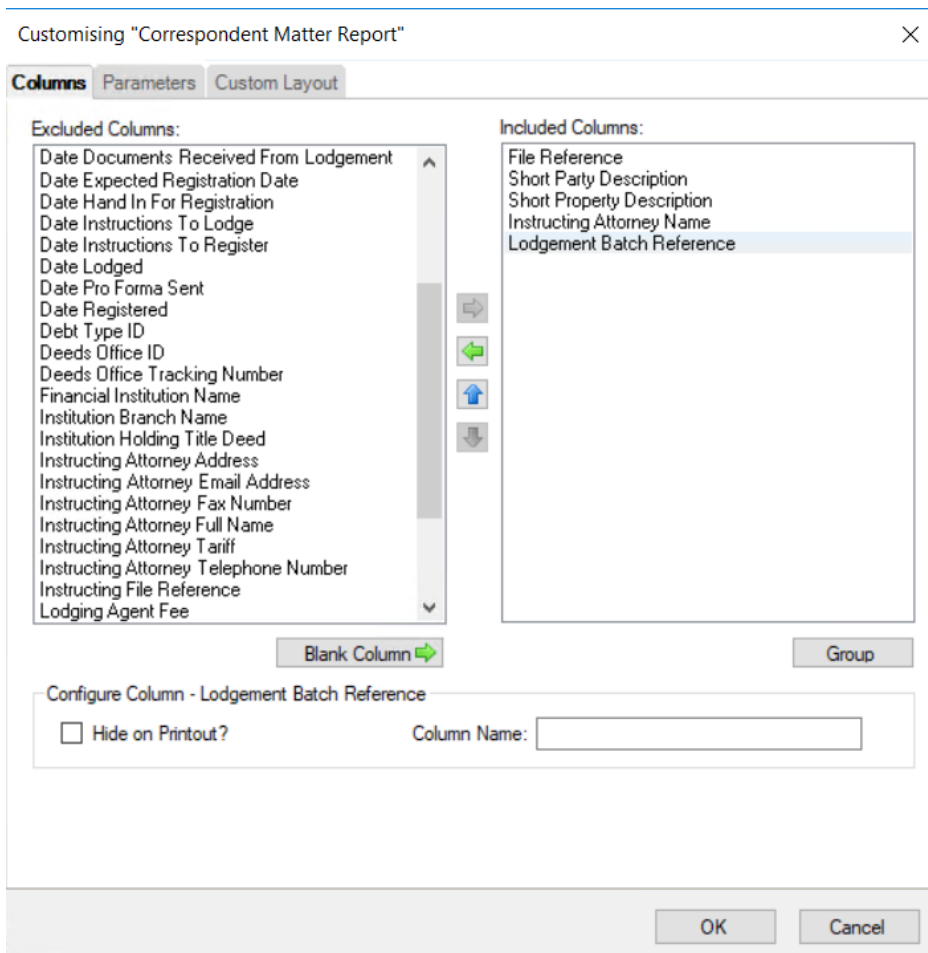
## Correspondent Matter Report:

A new 'Correspondent Matter Report' has been added to the Lexis Convey Reports offering. The Lodgement Batch reference has been made available as a column and parameter for customisation on this new report.

Report List **Correspondent Matter Report**

Refresh | Customise... | Save As... | Export | Preview ▾ | Save Current Report Config | Save As Base Report |

File Reference	Short Party Description	Short Property Description	Instructing Attorney Name
<i>filter text</i>	<i>filter text</i>	<i>filter text</i>	<i>filter text</i>
058005677500100010004	Sanger / Collins	Erf 765 Overview	
120373434300100010004	JOINT VAN DER MERWE ...	Unit 11, SS WENDY GARDENS	
126548	James Dean / NedBank	ERF 123 CLAMONT	AN Other
160385530000100010004	Charlie Mellow	361 Main Road Newlands 7700	
161128370700100010004	Sanger / Collins	Erf 765 Overview	
20090408134833038	JOINT VAN DER MERWE ...	Unit 11, SS WENDY GARDENS	Korbitec Inc.
20090409092243446	ESKOM FINANCE COMPA...		Korbitec Inc.
20090409094222313	LOTRIET MNR JE & MEV L...	Erf 33101 PLATTEKLOOF GLEN	Korbitec Inc.
20090424143249730	MS. C DAVIDS / First Natio...	ERF NUM 33 PORTION 3333 ...	Korbitec INC.
20090424144420223	MRS. I S DAVIDSON / First...	UNIT 1 GREENFIELDS	Korbitec Inc.
20090424144420223	MRS. I S DAVIDSON / First...		Goldberg Jackson Kottler and Asso...
20090424144420223	MRS. I S DAVIDSON / First...		Goldberg Jackson Kottler and Asso...
20090424144420223	MRS. I S DAVIDSON / First...		Goldberg Jackson Kottler and Asso...
20090511113900620	Estate Late Taylor to Park S...	Eenheid 10, SS PARADYSKLO...	AN Other



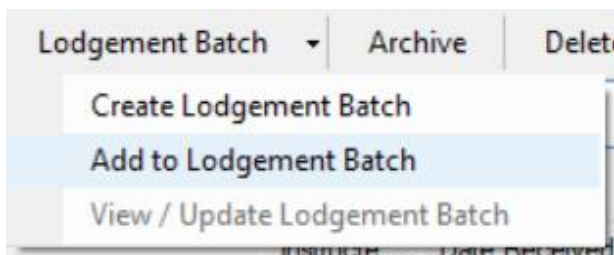
Report List **Correspondent Matter Report**

Refresh **Customise...** Save As... Export Preview Save Current Report Config Save As Base Report

File Reference	Short Party Description	Short Property Descri...	Instructing Attorney N...	Lodgement Batc...
<i>filter text</i>	<i>filter text</i>	<i>filter text</i>	<i>filter text</i>	st
20090424144420223	MRS. I S DAVIDSON / First...	UNIT 1 GREENFIELDS	Korbitec Inc.	Smith and Straus 19...
20090424144420223	MRS. I S DAVIDSON / First...		Goldberg Jackson Kottler an...	Smith and Straus 19...
20090424144420223	MRS. I S DAVIDSON / First...		Goldberg Jackson Kottler an...	Smith and Straus 19...
20090424144420223	MRS. I S DAVIDSON / First...		Goldberg Jackson Kottler an...	Smith and Straus 19...

### Add to Lodgement Batch:

Add an existing Correspondent Matter to an existing Lodgement Batch by selecting 'Add to Lodgement Batch' in the Lodgement Batch button dropdown.



Search for the applicable Lodgement Batch in order to add the selected Correspondent Matter. Select any matter with the applicable Lodgement Batch reference:

Matter Search

Simple | Advanced

Search by:  Search  Include archived matters

Lodgement Batch Reference	File Reference	Our Reference	Parties	Short Property Description
Smith and Strauss 191002	20090424144420223	JIG	MRS. I S DAVIDSON / First National Bank	UNIT 1 GREENFIELDS
Smith and Strauss 191002	20090424144420223	HaroldG	MRS. I S DAVIDSON / First National Bank	
Smith and Strauss 191002	20090424144420223	HaroldG	MRS. I S DAVIDSON / First National Bank	
Smith and Strauss 191002	20090424144420223	HaroldG	MRS. I S DAVIDSON / First National Bank	

Add to lodgement batch

Are you sure you want to add matter "20190920094853934" to batch "Smith and Strauss 191002" ?

Yes No

The Correspondent matter will be added to the existing Lodgement Batch.

File Reference	Matter Subtype	Parties	DOTS Number
20090424144420223	Other - Form W	MRS. I S DAVIDSON / First National Bank	
20090424144420223	Transfer	MRS. I S DAVIDSON / First National Bank	
20090424144420223	Consent	MRS. I S DAVIDSON / First National Bank	
20090424144420223	Bond	MRS. I S DAVIDSON / First National Bank	
20190920094853934	Other - Notarial Deed of Cession	to Mary Bloggs	

File Reference: \* 20190920094853934

Matter Subtype: \* Other

Other Matter Type: \* Notarial Deed of Cession

Parties: \* to Mary Bloggs

DOTS Number:

Update any necessary information and click on 'Update Lodgement Batch' for the changes to be applied.

Update Lodgement Batch

Batch Summary

Batch reference: 317623752400100010004 No. of items in batch: 5

Number of matters to add:  Add Deeds Office: Cape Town

Remove

File Reference	Matter Subtype	Parties	DO Tracking No
531685758000100010004	Bond	JOINT VAN DER MERWE MR EA & FERR...	
236327845200100010004	Other - Section 4(1)(b) application	JOINT VAN DER MERWE MR EA & FERR...	
840804651600100010004	Consent	JOINT VAN DER MERWE MR EA & FERR...	
61227722800100010004	Transfer	JOINT VAN DER MERWE MR EA & FERR...	
317623752400100010004	Bond	JOINT VAN DER MERWE MR EA & FERR...	

File reference: \* 531685758000100010004

Matter subtype: \* Bond

Parties: \* JOINT VAN DER MERWE MR EA & FERREIRA MISS ME / ABSA

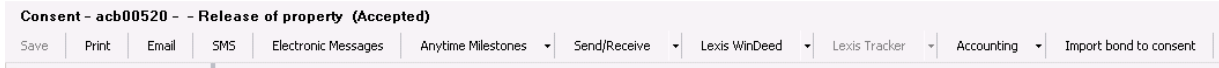
DO tracking no:

Update Lodgement Batch Cancel

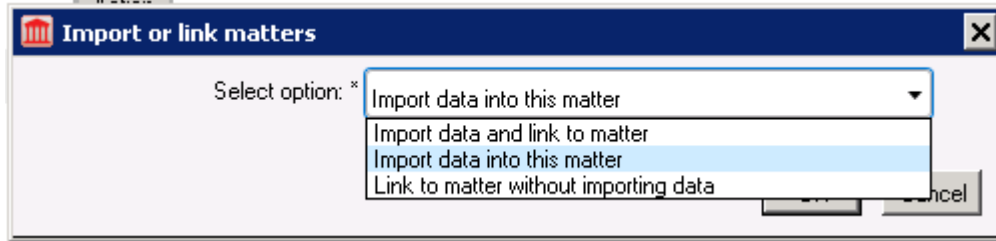
## Change Requests

### Import a Bond to a Consent

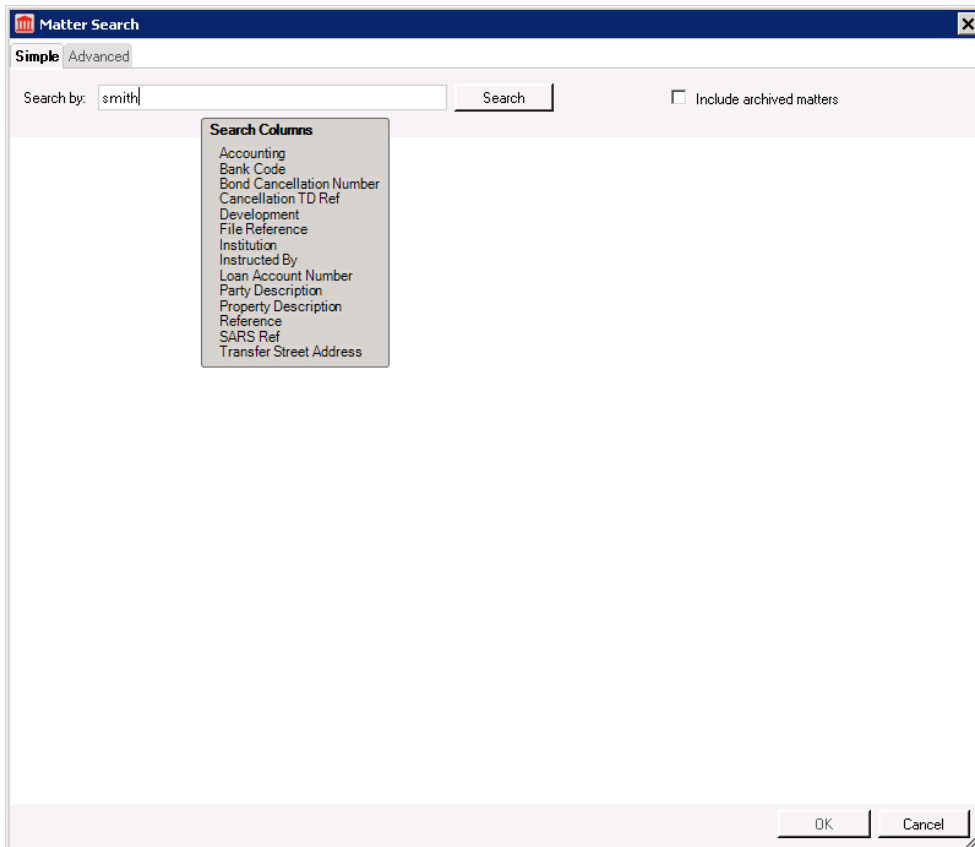
New importing functionality has been added for Consents. A new 'Import bond to consent' button available on the Consent menu.



The following options are available when importing a bond to a consent:



Search for the applicable Bond matter to be imported once an import option has been selected.



The appropriate data will be added to the matter once the import is complete.



Maintain completed milestones when linking an ETI to an existing matter

New functionality has been added to maintain the completed milestones of the manually captured Transfer when linking to an electronically instructed Transfer received for the same transaction.

For example, on the manually captured Transfer, milestones are completed up until Purchaser Signed Documents and the matter is in a Document signed state:

**Transfer - Ashby / COLt - Transfer (Documents signed)**

Save | Print | Email | SMS | Anytime Milestones | Send/Receive | Lexis WinDeed | Rates Clearance | Lexis Track

Milestone Summary	Milestone Summary
Transfer Details	07 Oct 19 07 Oct 19
Correspondence	✓ <b>Purchaser Contacted</b> 07 Oct 19 07 Oct 19 <span>Action</span>
Transfers (1) Gordon Ahsby	✓ <b>Status Documents Received</b> 07 Oct 19 <span>Action</span>
Transferor Descriptions	✓ <b>Title Deed Requested</b> 08 Oct 19 07 Oct 19 <span>Action</span>
Transferees (1) Colby	✓ <b>Title Deed Received</b> 16 Oct 19 07 Oct 19 <span>Action</span>
Transferee Descriptions	✓ <b>Rates Figures Requested</b> 07 Oct 19 <span>Action</span>
Signing Details	✓ <b>Rates Figures Received</b> 07 Oct 19 <span>Action</span>
Properties (1) ERF 100 LORRAINE	✓ <b>HOA Levy Figures Requested</b> 07 Oct 19 <span>Action</span>
Property Descriptions	✓ <b>HOA Levy Figures Received</b> 07 Oct 19 <span>Action</span>
Financial	✓ <b>Initial Letter Sent</b> 08 Oct 19 07 Oct 19 <span>Action</span>
SARS	✓ <b>Cancellation Figures Requested</b> 08 Oct 19 07 Oct 19 <span>Action</span>
Additional Documents	<b>Sales Conditions</b>
Pro Forma Account	✓ <b>Suspensive Conditions Fulfilled</b> 07 Oct 19 <span>Action</span>
Messages	✓ <b>Deposit Received</b> 07 Oct 19 <span>Action</span>
Matter Comments	✓ <b>Bond Granted</b> 07 Oct 19 <span>Action</span>
Attached Documents	✓ <b>Balance of Purchase Price Received</b> 07 Oct 19 <span>Action</span>
Matter History	<b>Documents and Costs</b>
	✓ <b>Documents Drawn</b> 16 Oct 19 07 Oct 19 <span>Action</span>
	✓ <b>Draft Deed Sent</b> 18 Oct 19 07 Oct 19 <span>Action</span>
	✓ <b>Seller Signed Documents</b> 22 Oct 19 07 Oct 19 <span>Action</span>
	✓ <b>Purchaser Signed Documents</b> 22 Oct 19 07 Oct 19 <span>Action</span>
	<b>Pro forma Costs Received</b> 29 Oct 19 <span>Action</span>

Now when accepting the electronic Transfer instruction in the Message Centre, the system will prompt the user to connect to the manual matter that already exists.

Inbox (284)

Reply | Accept | Re-process | Lexis Tracker | Delete | Print | Export

State	Type	To	From	Subject
		<i>filter text</i>	<i>filter text</i>	esta
State: Inbox (2 items)				
		[Unassigned]	Transfer Instructions	Estate Agent Transfer: Initial instruction
		[Unassigned]	Transfer Instructions	Estate Agent Transfer: Initial instruction

**Create New Matter**

File reference: \* AG 20191007102747809

Our reference: \* JillG

Branch: Justin Thomas Attorneys

Milestone Process: \* Estate Agent Transfer (ETI)

Instruction Details:

Property Description:

Party Description: WATERFALL COUNTRY ESTATE

Buttons: Create and Open, Create, Connect to matter, Cancel

The matters are connected once the existing matter is located and selected.

**Connect to Existing Matter**

New milestone process applied to this matter. Some milestones may be lost.

File reference: \* ETI Connect

Our reference: \* JillG

Branch: Justin Thomas Attorneys

Milestone Process: \* Estate Agent Transfer (ETI)

Buttons: Connect and Open, Connect, Cancel

The completed milestones and matter state will now be maintained when clicking 'Connect and Open'.

**Transfer - Ashby / COLt - Transfer (Documents signed)**

Save | Print | Email | SMS | Anytime Milestones | Send/Receive | Lexis WinDeed | Rates Clearance | Lexis Track

**Milestone Summary**

Transfer Details

Financial

SARS

Additional Documents

Pro Forma Account

Messages

Matter Comments

Attached Documents

Matter History

**Milestone Summary**

07 Oct 19

---

**Summary**

**Attorney Classification** Action

**Free Format from Attorney** Action

**Document to Share** Action

---

**Preliminaries**

✓ **Confirmation of Receipt** Action  
07 Oct 19 07 Oct 19

✓ **Estimated Registration Date** Action  
07 Oct 19

✓ **Seller Contacted** Action  
07 Oct 19 07 Oct 19

✓ **Purchaser Contacted** Action  
07 Oct 19 07 Oct 19

✓ **Rates Figures Received** Action  
07 Oct 19

---

**Sales Conditions**

✓ **Suspensive Conditions Fulfilled** Action  
07 Oct 19

✓ **Deposit Received** Action  
07 Oct 19

✓ **Bond Granted** Action  
07 Oct 19

---

**Pre-Lodgement**

✓ **Seller Signed Documents** Action  
22 Oct 19 07 Oct 19

✓ **Purchaser Signed Documents** Action  
22 Oct 19 07 Oct 19

## Filter text applied to all Setup grids

All Setup lists grid view functionality has been improved and will now have a filter text function for each column.

Attorney Firms	
New	Delete <input type="checkbox"/> Include inactive items?
Attorney Name	Address
<input type="text" value="V"/>	<input type="text" value="filter text"/>
BJ VAN DER WALT & SCHOEMAN	B J VAN DER WALT & SCHOEMAN, P O Box 112, PRETORIA, 0001
CK Friedlander Shandling Volks	CK Friedlander Shandling Volks, 8th Floor Greenmarket Place, 54 Shortmarket Street, Cape Town, ...
Gavin Gower & Co	Gavin Gower & Company, Docex 16, Port Shepstone
Goldbauers, Bellville	Goldbauers, DOCEX 23, Bellville
Koos van Jaarsveld	Iewers

Estate Agencies					
New	Delete	<input type="checkbox"/> Include inactive items?			
Estate Agency	Email address	VAT Number	Fax Number	Address (English)	Address (Afrikaans)
<input type="text" value="P"/>	<input type="text" value="filter text"/>	<input type="text" value="filter text"/>	<input type="text" value="filter text"/>	<input type="text" value="filter text"/>	<input type="text" value="filter text"/>
_PRIVATE SALE	no-reply@lexisnexis.co.za				
Costa Plenty Estates Plettenbu...	no-reply@lexisnexis.co.za			Name and address - Costa Ple...	Name and address - Costa Ple...
Garyn Peters LTD	no-reply@lexisnexis.co.za				
Leap Frog	no-reply@lexisnexis.co.za	1234567897		240 Main Road	240 Main Road
Pam Golding	no-reply@lexisnexis.co.za		0214454569		
Paul Gruttenburg Realtors tradi...	no-reply@lexisnexis.co.za			Pears Estates78 Oak AveWY...	Pears AgenteOaklaan 78WYN...
Pears Estates	no-reply@lexisnexis.co.za			Pears Estates78 Oak AveWY...	Pears AgenteOaklaan 78WYN...
Pears Estates	no-reply@lexisnexis.co.za			Pears Estates78 Oak AveWY...	Pears AgenteOaklaan 78WYN...

## User Categories for Consents and Consent Reporting

The User Categories feature has been extended to be available Consent Matters.

A new User Categories tab is now available in Setup > Consents > User Categories.

Consents
Account Items
▶ Financial Services Providers (2)
▶ Firm Signatories (11)
Print List
Templates
▲ <b>User Categories (3)</b>
UserCategory1
UserCategory2
UserCategory3

Each User Category can now be configured as required.

**User Categories**

↑ Move up | ↓ Move down

Categories

*filter text*

UserCategory1
UserCategory2
UserCategory3

Category Details

Category Name:

Selecting the specific User Category to complete the necessary values.

**Firm Settings**

- Our Branches (4)
  - Betty
  - Cape Town
  - Danielle Hartnick
  - Parow
- Trust Accounts (10)
- Users
- My Settings
- Common
- Bonds
- Transfers
- Consents**
- Account Items
- Financial Services Providers (2)
- Firm Signatories (11)
  - Print List
  - Templates
- User Categories (3)
  - UserCategory1**
  - UserCategory2
  - UserCategory3

**UserCategory 1**

New | Delete | ↑ Move up | ↓ Move down |  Include inactive items?

Category value

*filter text*

UserCategory1Value1
UserCategory1Value2
UserCategory1Value3

Category Details

Category Value:

For example: Configure User Category 1 as Project Phase; with Category Values of Phase 1, Phase 2, Phase 3.

**Firm Settings**

- Our Branches (4)
  - Betty
  - Cape Town
  - Danielle Hartnick
  - Parow
- Trust Accounts (10)
- Users
- My Settings
- Common
- Bonds
- Transfers
- Consents
- User Categories (3)
  - Project Phase**
  - UserCategory2
  - UserCategory3

**Project Phase**

New | Delete | Move up | Move down |  Include inactive items?

Category value

filter text

Phase 1

Phase 2

Phase 3

Category Details

Category Value:

Ensure the 'Enable user categories for reporting' Advance Setting is set to Value = Yes. This will enable the User Categories feature for Bonds, Transfers and Consents.

Set the 'Enable alphabetic sorting of user categories' if the values should display alphabetically in the matter.

Advanced Settings		
Revert		
Description	Value	Default Value
user cat	filter text	filter text
Enable alphabetic sorting of user categories	No	No
Enable user categories for reporting	Yes	No

The User Categories will now be available on the Consent Details tab for selection.

User categories

Project Phase:

UserCategory2:

UserCategory3:

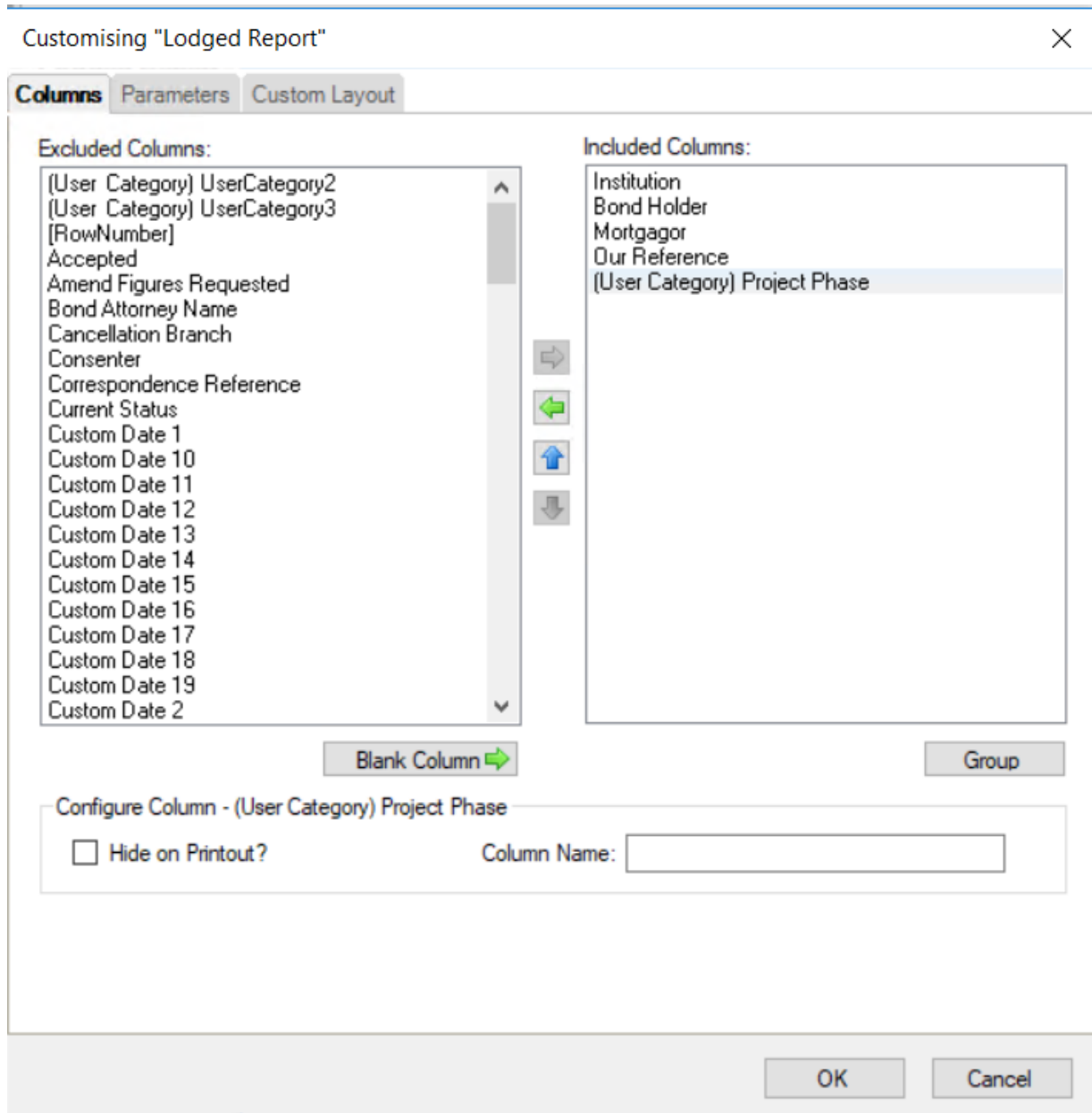
User categories

Project Phase:

UserCategory2:

UserCategory3:

The User Categories for Consents will now be available on Consent Reports as Columns or Parameters to customise.



## Matter List: Matter History

The functionality of the Matter History tab on the Matter Summary section on the Matter list has been improved.

The full Matter Comment on the Matter History entry can now be viewed on hover.

Date	User	Description	Description
2019/10/13 3:21:04 PM	Supervisor	Matter Comments: Knowing where to look and what to watch out for...	
2019/10/03 9:12:31 AM	Supervisor	Milestone [Balance of Purchase Price Received] actioned on 2019/10/03	
2019/10/03 9:12:05 AM	Supervisor	Milestone [Bond Granted] actioned on 2019/10/03	
2019/10/03 9:11:57 AM	Supervisor	Milestone [Deposit Received] actioned on 2019/10/03- Activity [Email when Depo	
2019/09/25 11:54:38 AM	Supervisor	New draft request created on Rates Clearance for each property on this matter	
2019/09/25 11:42:04 AM	Supervisor	Lexis Tracker: [Connect to Chat]	
2019/09/25 11:42:02 AM	Supervisor	Deeds Office search performed	
2019/09/25 11:42:02 AM	Supervisor	Milestone [Date Received] actioned on 2019/09/25	
2019/09/25 11:42:02 AM	Supervisor	Matter state changed to Accepted on 2019/09/25	
2019/09/25 11:42:02 AM	Supervisor	Matter state changed to New on 2019/09/25   Matter created.	

**Description**  
Knowing where to look and what to watch out for is half the battle. Download this report to understand the most pervasive types of email threats, how security professionals perceive them and what they're doing to combat them. Most importantly, you'll walk away with actionable steps to improve your organisation's email security and cyber resilience.

## Status Report (All Bonds): Working Days Since Receipt

A new field 'Working Days Since Receipt' has been made available for customisation on the Status Report (All Bonds) Report.

Customising "Status Report (All Bonds)"

Columns Parameters Custom Layout

**Excluded Columns:**

- (User Category) Township
- (User Category) UserCategory2
- (User Category) UserCategory3
- [RowNumber]
- Acknowledge Cancel to Reassign
- Acknowledge Reinstate
- Acknowledge Suspend
- Acknowledge Withdraw
- Action by
- Additional Data Sent
- Amended Figures Received
- Amendment Acknowledged
- Amendment Rejected
- Audit Approved
- Audit Requested
- Authority to Pay Sent
- Bank Branch Name
- Bank Reference
- Bond Active
- Bond Classification
- Bond Classification (Full)
- Bond Costs Sent

**Included Columns:**

- Bond Code
- Sort Name
- Loan Account Number
- Short Property Description
- Institution Code
- Date Received
- Date Lodged
- Date Registered
- Remarks
- Working Days Since Receipt

Blank Column Group

Configure Column - Working Days Since Receipt

Hide on Printout? Column Name:

OK Cancel



The Working Days Since Receipt is the number of days since date received, excluding weekends and public holidays.

Please note: No bank specific SLA calculations are applied to this field.

## Transfers: Listing Agency available on Matter List and Reports

A new column and parameter for the 'Listing Agency' has been made available for customisation on the Transfers Matter List View and Reports.

Setup > My Settings > Matter List Settings

Select Columns

Excluded Columns:

- Account Number
- Archive Reference
- Batch
- Cause of Action
- Contact Person
- Date Archived
- DeedTracker Status
- Development
- DOT Number
- Electronic Reference
- Expected Registration Date
- Instructed By
- Last Action Date
- Last Comment
- Last Movement Date
- Linked
- Lodgement Batch Reference
- Our Branch
- Pending Messages
- Pending Milestones
- Property Type
- Registration Date

Included Columns:

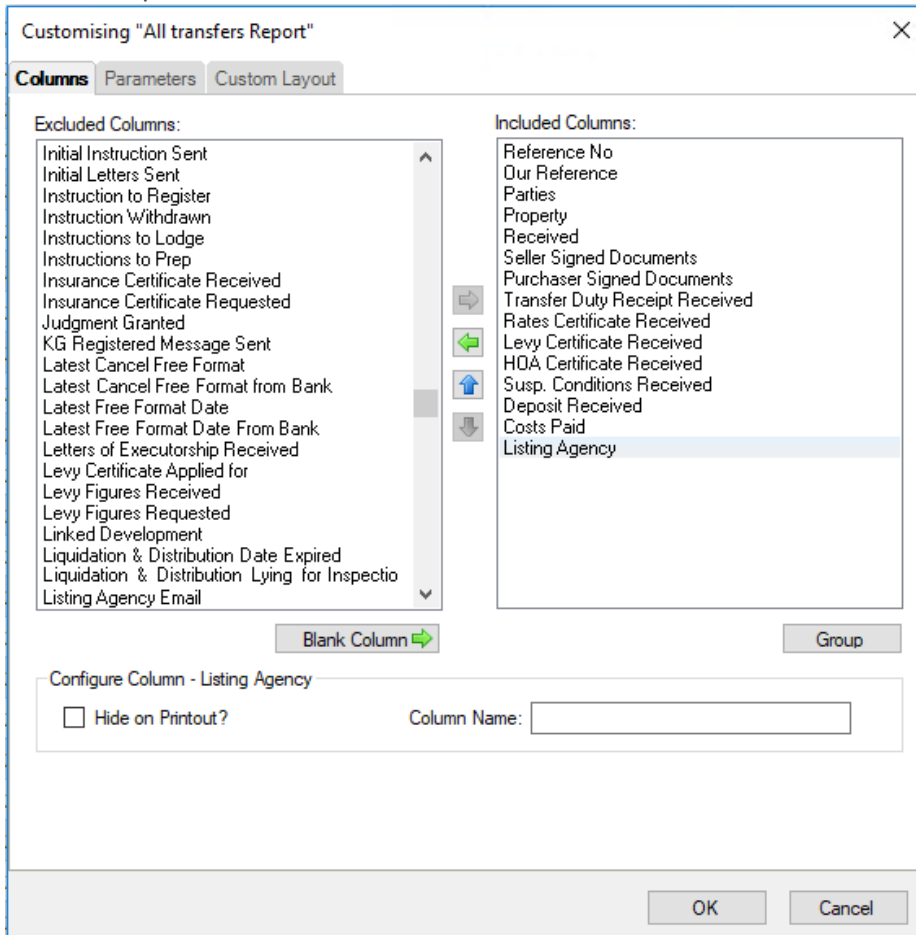
- Property Hub alert
- Info
- State
- File Reference
- Our Reference
- Parties
- Short Property Description
- Date Received
- Deeds Office
- Master Reference
- Listing Agency

Show in groups

Hide group column when grouping

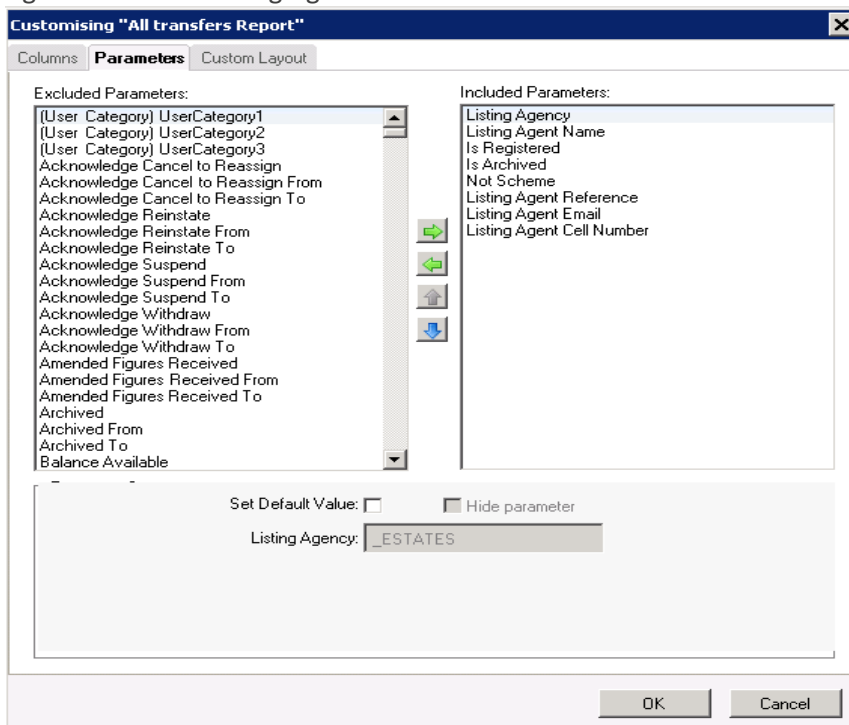
Revert to Default Set as Default OK Cancel

Transfer Reports:



Additional Parameters for the Listing Agency has been made available for customisation for the All transfers Report.

The new parameters include the Listing Agency, Listing Agent Name, Listing Agent Reference, Listing Agent Email and Listing Agent Cell Number.



## Technical: Create a new Bond Institution

Added new functionality to configure and create new Bond Institutions from the Lexis Convey UI in Debug mode. The newly created Institution can be exported and imported as automatically generated code into an integrated development environment (IDE) like Visual Studio. The code needed to create the new institution is generated, including data capture, milestones and a general BNDE/BNDA print list.

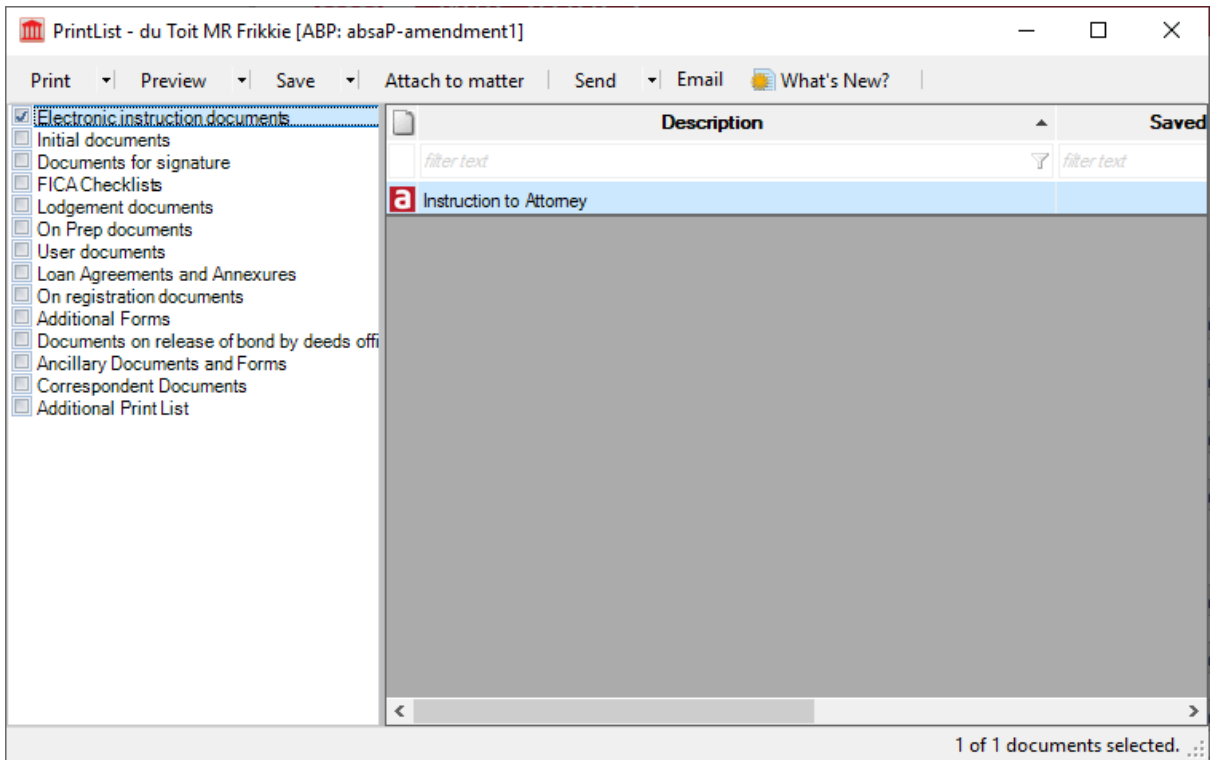
This new functionality makes Lexis Convey more efficient in adding new Bond institutions.

Once the institution is created and released the user can setup any additional templates it might need.

## Document Maintenance

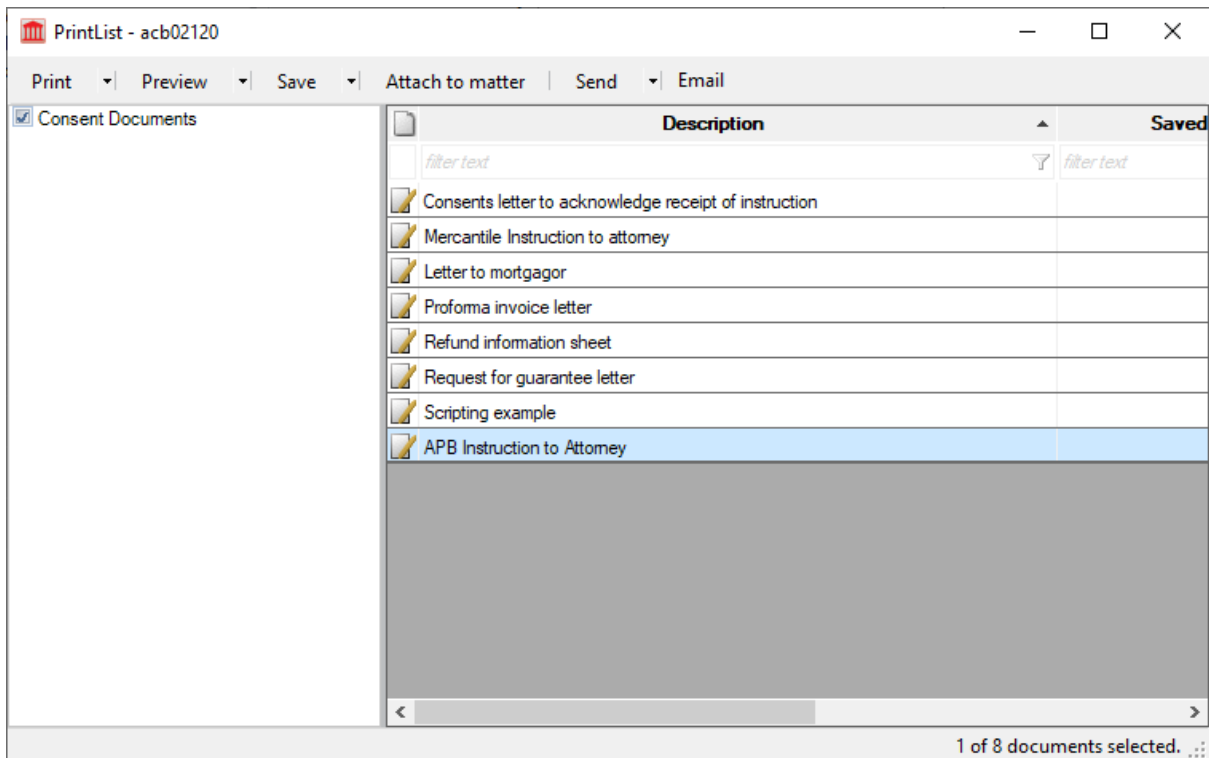
### ABSA Private Bank – Bonds

Added the new Instruction to Attorney document to Absa Private Bank Bonds print list.



## ABSA Private Bank – Consents

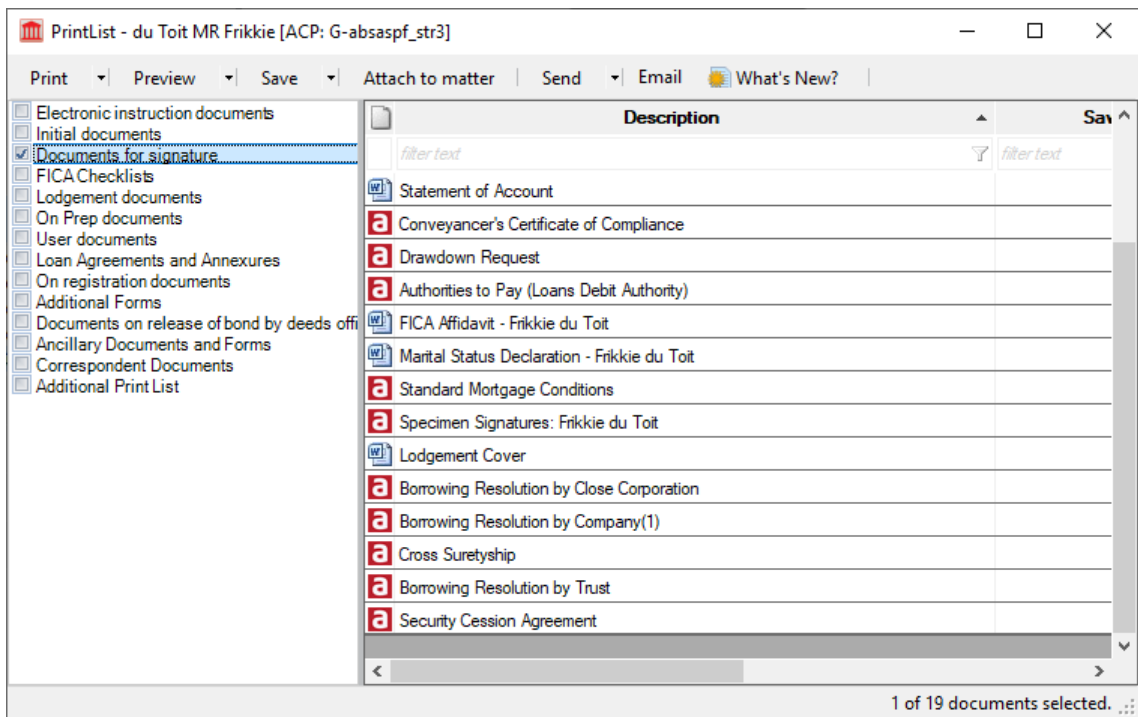
Added the new Instruction to Attorney document to Absa Private Bank Consents print list.



## ABSA CPF Bonds

The following special document requirements have changed:

- Borrowing Resolution by Company
- Borrowing Resolution by Close Corporation
- Borrowing Resolution by Trust
- Cross Suretyship
- Guarantee Agreement
- Security Cession Agreement



The Security Cession Agreement (when selected as a special document on the matter) adds the following grids available for capture to the Financial tab.

- Bank Accounts
- Insurance Policies
- Investments

**Financial**

(annual):

Amount of Insurance:

Collateral Security Required?

Total Tariff Fee:  (Firm's Tariff Fee + Lodging agent's fee.)

Firm's Tariff Fee:

Fee reduction amount:   BEE discount required

Lodging Agent's Fee:

Lodging Agent's Posts and Petties:

Assessment Fee:

Initiation Fee:

Loss of Rent (12 Months - min 20% of sum insured):

Bank Accounts:

Account Number	Account Type	Bank Name	Branch Name
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Insurance Policies:

Description	Insurance Registration Number	Name	Policy Number
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Investments:

Investment Number	Institution Name	Type
<input type="text"/>	<input type="text"/>	<input type="text"/>

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## Maintenance

Issue Code	Description
CAT-111092	The narrative for the STRDEEDCRST Development Account item has been replaced with Ghostfill scripting in order to pull through to the account dynamically based on the Deeds Office fee charged.
CAT-108936	Home Owners Association-related milestones will now apply to Sectional properties as well as Conventional properties.
CAT-89688	Bond Account: Fee for preparing surety not pulling through has now been fixed.
CAT-110973	New Bond Institution UMASTANDI PTY LTD has been added.
GCDev-111949	Transfer Duty Fee no longer defaults to 39.95. This has been changed to reflect the value captured in Setup (Setup/Transfer/Transfer Duty Application Fee). If value is captured as zero it will show as zero on the Financial tab on the matter.
GCDev-111905	Refresh issue: EUA not immediately reflecting on the Transfer Summary report has been fixed.
GCDev-111815	Conventional Developments description defaulting to Portion [X] now correctly defaults to Erf [X].
GCDev-111697	Bonds: Quotation Calculator with VAT Items Total off by 1c has been fixed.
GCDev-111589	Templates: Transfer Quotation Email and SMS templates - "No Template Found" error has been fixed.
GCDev-111459	Developments: Missing Certificate of Registered Sectional Title document has been fixed.
GCDev-111458	New Validation has been added to the Delay Reason Milestone to check if the ERD has been set.
GCDev-111450	Fixed the Cancellation figures requested not being queued after electronic cancellation is sent.
GCDev-111174	Improved performance on Management Reports for Transfers.
GCDev-111149	Accounting plug-in error causing messages in outbox to show Input string was not in a correct format has been fixed.
GCDev-110300	Fixed Document Path not found error when no Employee Clause applies on ABSA Power of Attorney and Bond documents.
GCDev-109010	Fixed inconsistencies with Pay Authorities from Guarantee Hub.
GCDev-108962	Master Transfers: Issues when copying updated fields to child transfers has been fixed.
	Fixed Non-Vatable account items which show a vat amount