Lexis Convey v17.2.4

Release Notes

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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.

Trust account:			 Total Amount (Excl. VAT) 	c .	9712.10
BEE discount applies:]		Total VAT		1213.50
larration		Amount	VAT	Total	Balance
Deeds Office Search Fee		150.00	22.50	172.50	172
Initiation fee		199.50	0.00	199.50	372
Valuation fee		615.60	0.00	615.60	987
Deeds Office Fee		507.00	0.00	507.00	1 494
postages, petties and telephone		200.00	30.00	230.00	1 724
our fees for taking instruction, drawi	ing Power of Attorney t	7 740.00	1 161.00	8 901.00	10 625
ectronic Document Generation Fee		300.00	0.00	300.00	10 925
Details Narration: T Nature: Fr	o postages, petties and to	, <u> </u>	Amount (excl. VAT)	- L	200.00
Narrative for VAT-only entry (if T required):	o VAT on postages, petti	es and telephone	VAT Amount		30.00
			Amount (Incl. VAT)		230.00

Below is an example of the Bonds > Accounts tab:

Tool bar buttons:

• New:

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

Accounts	
New Delete 🛧 Move up 🐥 Move down	Update Account Reset to Default Hide Discount
Add an additional or ad hoc item to the account.	Total Amount (Excl. VAT):

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 a	dditiona	l c	ustom		account	item:
Accounts						
New 🛛 Delete 🛛 🛖 Move u	p 🛛 🐺 Mor	ve down Update Accour	nt Reset to	Default Hide	Discount	-
Trust account:		•	- Te	otal Amount (Excl. VAT):	1274.00
BEE discount applies:				Total VAT	r.	56.25
				Total VAI		50.25
Narration		Amount	VAT	Total	l	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	J	0.00	0.00	1 330.25
Details Description: Narration: Nature: Narrative for VAT-only entry (if required):	Custom [New account	item]		Amount (excl. VAT Vatable VAT Amoun Amount (Incl. VAT	e: 🔽	0.00 D
Accounts New Delete 1 1 Move u	p 🖡 Mor	ve down Update Accour) Default Hide	Discount	1071.00
Trust account:		· · · · · · · · · · · · · · · · · · ·		otal Amount (Excl. VAT		1274.00
BEE discount applies:				Total VA1	Г:	56.25
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:	Custom		· (i)	Amount (excl. VAT):	0.00
Narration:	Charity Donatio	on C		Vatable	e: 🔽	
Nature:				VAT Amoun	it:	0.00
Narrative for VAT-only entry (if				Amount (Incl. VAT	n:	0.00
required):				and the second sec		0.00



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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.

Details		
Description: Custom	Amount (excl. VAT):	0 🔡
Narration: [New accou	em] C Information:	
Nature:	List of line items marked as 'ad hoc' in setup	0.00
Narrative for VAT-only entry (if required):	Amount (Incl. VAT):	0.00

Select Ad hoc account item in Setup:

User Modified	Insurance Cert	ificate Fee		
User	Electronic Doc	sument Generation Fee		
General				
	Description: *	Insurance Certificate Fee	Amount	Bond.InsuranceCertfee
	Code: *	INSURANCECERTFEE	Vatable:	
	Nature:	Disbursement 🔹		
Ad ho	oc account item?	ঘ		
	Criteria:	IfTrue(Bond.InsuranceCettfee=0,False,True)		
Narrations				
Narra	ition Debit (Eng):	To provision for Sectional Title Insurance Certificate		
Narr	ration Debit (Afr):	Aan voorsiening van Deeltitel Versekerings Sertifikaat		

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.

– Details –		
Description:	Insurance Certificate Fee	i
Narration:	Custom Insurance Certificate Fee	
Nature:	Disbursement	
Narrative for VAT-only entry (if required):		

Delete:

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

Accounts	
New Delete 🕈 Move up 🛛 🖡 Move down 🔹 Update Account 🔹 Reset to Default	Hid
Trust account: Delete one or more selected line items.	Total Ar

• 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.

Accounts New Delete 1 Move up 4 Move down Up	date Account Reset to Default Hide Discount
· · · · · · · · · · · · · · · · · · ·	
Trust account:	Total Amount (Evol V/AT)
	🔄 Get new and updated account items based on current matter data. 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 checks 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:

nly	ollowing account item(s) have been changed since you last updated the account(s). selected items will be updated.			
$\overline{\nabla}$	Select All Narration	Change	Current Amount (excl. VAT) 👻	New Amount (excl. VAT)
~	To initiation fee	Delete	834 234,34	
~	To valuation fee	Update	834 234,34	725 421.1
•	To administration fee	Update	83 <mark>4</mark> 234,34	725 421,1
~	To postages, petties and telephone	Update	200,00	173,9
~	To Deeds Office Search Fee	Update	200,00	173,9
~	To our fees for taking instruction, drawing Power of Attorney to pass Bond, drawing Bond and other doc	Update	16 560,00	14 400,0
•	To preparation of Suretyship for Housing Scheme	New		100,0
~	To Courier Charges	New		200,0
~	To Gas certificate	New		50,0

Update Account dialog for Transfers:

	Jpdate Acco	un(s)				- 0	×
only s		count item(s) have been changed since you last updated the account(s). ems will be updated.					
	Account	Narration	Change	•	Current Amount (excl. VAT)	New Amount (ex	cl. VAT)
•	Transferee	Language Change on the matter	Update		Afrikaans		Englist
•	Transferee	To Courier Charges	New				100,0
•	Transferee	To purchase price	Delete		900 000.00		
•	Transferor	To electrical compliance certificate	Delete		500,00		
•	Transferor	To borer certificate	Delete		100,00		
~	Transferee	By deposit received	Delete		-100 000,00		

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.

I	Accounts	
	New Delete 🕇 Move up	Move down Update Account Reset to Default Hide Discount
	Trust account:	Tatal Amount (Kew) VATC Reset entire account to default, based on setup accounts. Ad hoc and additional 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	e up 🔰 🦊 Move do	own Update Account F	leset to Default Hide Di	iscount	
Trust account:			 Disable li	Total Amount (Excl. VAT): ne items. Hidden items will not ge	added to account total.
Accounts New Delete Move	up 🛛 🖶 Move dowr	n Update Account Reset	to Default Unhide Disco	punt	
Trust account:		•	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, draw	ing 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:	o Valuation fee	C	Amount (excl. VA1	Ŋ:	615.60
Nature: D	Disbursement	,	 Vatabl 	e: 🔄	
Narrative for VAT-only entry (if required):			VAT Amour	nt:	0.00
			Amount (Incl. VAT	Ŋ:	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.

Accounts New Delete Move up Move down	Update Account Reset to De	fault Hide Dis	icount
Trust account:	•	Total Amount (Excl.)	
BEE discount applies:		Total	Create a discount item calculated against the selected line item.

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.

Specify discount details			×
Details			
Discount type:	Percentage		•
Discount percentage:	0.00	Discount amount:	0.00
Narration	To Deeds Office Search Fee disco	ount at 0%	C
			OK Cancel
Specify discount details			×
Details			
Discount type:	Percentage		-
Discount percentage:	Amount Percentage]
Narration	To Deeds Office Search Fee disco	ount at 0%	C
			OK Cancel
m Specify discount details			×
Details			
Discount type:	Percentage		-
Discount percentage:	10.00	Discount amount:	15.00
Narration:	To Deeds Office Search Fee disco	ount at 10%	C
			OK Cancel

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 Discoun	t	
Trust account:					9697.10
BEE discount applies:			Total VAT:		1211.25
Narration		Amount	VAT	Total	Balance
To Deeds Office Search Fee		150.00	22.50	172.50	172.50
To Deeds Office Search Fee discount at 10%		-15.00	-2.25	-17.25	155.25
To Initiation fee		199.50	0.00	199.50	354.75
To Valuation fee		615.60	0.00	615.60	970.35
To Deeds Office Fee		507.00	0.00	507.00	1 477.35
To postages, petties and telephone		200.00	30.00	230.00	1 707.35
To our fees for taking instruction, drawing Power	of Attorney t	7 740.00	1 161.00	8 901.00	10 608.35
Electronic Document Generation Fee		300.00	0.00	300.00	10 908.35
Details					
Discount type: Percentage	•				•
Discount percentage:		10.0	0 Discount amoun	:	15.00
Narration: To Deeds 0	Office Search Fee	e discount at 10%			C

• 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 Upd	date Account Rese	t to Default Hide Disco	ount Balance		
Pro forma printed: 🔽						
To this part of the transfer accounts by adding the amount due To the transfer accounts by adding the amount due To the Amount (Eval VAT)						
Transferee						
New Delete 1 Move up V	Nove down Update	e Account Reset to I	Default Hide Discount	Balance		
Pro forma printed: 🔽						
-			 Total Amount (Excl. VA 	ים: ביים	0.00	
Trust account:			Iotal Amount (Excl. VA	0.		
BEE discount applies:			Total Amount (Excl. VA Total VA		0.00	
	Amount					
BEE discount applies:	Amount 7 filter text	Ţ	Total V	Total	0.00	
BEE discount applies:		₹ 11 600.00	Total V	Total filter text 7	0.00 Balance filter text	
BEE discount applies:			Total V VAT filter text	Total fiter text 7 13 340.00	0.00 Balance <i>hter text</i> 7 13 340,00	
BEE discount applies:		11 600,00 53 000,00 500,00	VAT filer text 7 1 740,00	Total fiter text 7 13 340,00 53 000,00 500,00	0.00 Balance <i>fiter text</i> 7 13 340,00 66 340,00 66 840,00 66 840,00	
BEE discount applies:		11 600,00 53 000,00	VAT 77 <i>Rev text</i> 77 1 740.00 0,00	Total fiter text 7 13 340.00 53 000,00 500,00	0.00 Balance Inter text 77 13 340.00 66 340.00 66 840.00 66 840.00 67 127.50	
BEE discount applies:		11 600,00 53 000,00 500,00	VAT Trotal V/ VAT 77 1 740.00 0.00 0.00	Total filter text 77 13 340.00 53 000.00 500.00 287,50	0.00 Balance <i>filter text</i> 77 13 340.00 66 340.00 66 840.00 66 840.00 67 127,50	
BEE discount applies:		11 600.00 53 000.00 500.00 250.00	VAT <i>Rev text</i> 77 1 740.00 0,00 0,00 0,00 37,50	Total <i>Ater text</i> 77 13 340.00 53 000.00 500.00 287,50 402,50	0.00 Balance Intertext 77 13 340,00 66 340,00 66 840,00 66 840,00 67 127,50 67 530,00	
BEE discount applies:		11 600.00 53 000.00 500.00 250.00 350.00	VAT Rev text 77 1 740,00 0,00 0,00 37,50 52,50	Total <i>Ater text</i> 7 13 340.00 53 000.00 287,50 402,50 402,50 447,35	0.00 Balance Ater text 77 13 340,00 66 340,00 66 840,00 66 840,00 67 127,50 67 530,00 67 977,35	
BEE discount applies:		11 600,00 53 000,00 500,00 250,00 350,00 389,00	VAT Mer test 7 1 740,00 0,000 0,	Total Total <i>Ater text</i> 77 13 340.00 53 000.00 287,50 402,50 402,50 447,35 345,00	0.00 Balance Ater text 7 13 340,00 66 340,00 66 540,00 66 540,00 67 127,50 67 530,00 67 977,35 68 322,35	
BEE discount applies:		11 600.00 53 000.00 500.00 250.00 350.00 389.00 300.00	VAT Siler test 7 1 740.00 0.00 0.00 37,50 52,50 58,35 45,00	Total Total New text 77 13 340.00 53 000.00 287,50 402,50 402,50 447,35 345,00 1 350 000.00 1 350 000.00	0.00 Balance Alter test 7 13 340,00 66 340,00 66 540,00 67 127,50 67 730,00 67 977,35 68 322,35 1 418 322,35	
BEE discount applies:		11 600,00 53 000,00 500,00 250,00 350,00 389,00 300,00 1 350 000,00	VAT <i>Otal VA</i> <i>Otal </i>	Total Total Rev text 77 13 340,00 53 000,00 287,50 402,50 402,50 402,50 1350 000,00 1 350 000,00 -100 000,00	0.00 Balance Alter test 7 13 340,00 66 340,00 66 340,00 67 127,50 67 530,00 67 7977,35 68 322,35 1 418 322,35 1 318 322,35	
BEE discount applies:		11 600,00 53 000,00 500,00 250,00 350,00 389,00 300,00 1 350 000,00 -100 000,00	VAT Cher text 77 Cher text 77 1 740,00 0,00 0,00 37,50 52,50 58,35 45,00 0	Total Rev text 77 13 340,00 53 000,00 500,00 287,50 402,50 447,35 345,00 1 350 000,00 -100 000,00 -10 250 000,00	0.00 Balance Alter test 7 13 340.00 66 340.00 66 340.00 67 127,50 67 530.00 67 977,35 68 322,35 1 418 322,35 1 318 322,35 68 322,35 68 322,35	



Account Summary:

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

Pro forma printed:			
Trust account:	•	Total Amount (Excl. VAT):	268.70
BEE discount applies:		Total VAT:	46.35

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

Trust account:	•	Total Amount (Excl.	VAT):	13952.00
BEE discount applies:	ABSA BANK LIMITED Eskom First	Tota	I VAT:	1953.00
Narration	FNB BANK LIMITED Ithala	VAT	Total	Balance
To Deeds Office Search Fee	Legal Associates Inc.	18.00	138.00	138.00
To Deeds Office Fee	Mercantile Limited	0.00	632.00	770.00
To postages, petties and telephone	NedBank Standard Bank	30.00	230.00	1 000.00
T	Standard Dank	1.005.00	14 005 00	15 005 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, petties 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 Nature: Fee			Z	120.00
Narrative for VAT-only entry (if To VAT on Deeds Office search required):	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:

- o Fee
- o Disbursement,
- o Journal
- o Payment
- o Receipt

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

- o Fee
- o Disbursement
- Narrative for VAT-only entry (if required):
 - $\circ\;$ 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.
 - \circ 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:

Details

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

Narration:	To transfer fees	Amount (excl. VAT):	15780.00
Nature:	Fee 🗸	Vat Type:	Vatable: Exclusive
			Non-Vatable
Narrative for VAT-only entry (if required):		VAT Amount	Vatable: Exclusive
			Vatable: Inclusive
			Vatable: Zero-rated
Party:	Transferee	Amount (Incl. VAT):	18147.00
Balancing Entry			
Narration:	By transfer fees	Amount (excl. VAT):	-15780.00
Nature:	Fee •	Vat Type:	Vatable: Exclusive
Narrative for VAT-only entry (if required):		VAT Amount	-2367.00
Party:	(Firm •	Amount (Incl. VAT):	-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).

Details				
Narration:	To postages and petties	C	Amount (excl. VAT):	100.00
Nature:	Fee	•	Vat Type:	Vatable: Exclusive
Narrative for VAT-only entry (if required):			VAT Amount	15.00
Party:	Transferee		Amount (Incl. VAT):	115.00
Balancing Entry				
	By postages and petties	C	Amount (excl. VAT):	-100.00
Nature:	Fee	•	Vat Type:	Vatable: Exclusive
Narrative for VAT-only entry (if required):			VAT Amount	-15.00
Party:	Firm	•	Amount (Incl. VAT):	-115.00
Details				
	To postages and petties	C	Amount (excl. VAT):	86.96
Nature:	Fee	•	Vat Type:	Vatable: Inclusive
Narrative for VAT-only entry (if required):			VAT Amount	13.04
	Transferee		Amount (Incl. VAT):	100.00
Balancing Entry				
Narration:	By postages and petties	G	Amount (excl. VAT):	-86.96
Nature:	Fee	•	Vat Type:	Vatable: Inclusive
Narrative for VAT-only entry (if required):			VAT Amount	-13.04
Party:	Firm	•	Amount (Incl. VAT):	-100.00



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- 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 –						
	To FICA identi	fication and verification fee	Amount (ex	cl. VAT):		250.00
Nature:	Fee	`	•	/at Type:	Vatable: Exclusive	•
Narrative for VAT-only entry (il required):			VAT	Amount:		35.00
	Transferee		– Amount (ir	ncl. VAT):		285.00
Balancing Entry			1		[
Narration:	By To FICA ide	entification and verification fee	Amount (e>	(cl. VAT):		-250.00
Nature:	Fee	•	•	/at Type:	Vatable: Exclusive	•
Narrative for VAT-only entry (il required):			VAT	Amount:		-35.00
Party:	Firm	•	 Amount (ir 	ici. VAT):		-285.00

Consents:

Details			
Narration:	Consent fee C	Amount (excl. VAT):	2500.00
Nature:	Fee -	Vatable:	
Narrative for VAT -only entry (if required):		VAT Amount	375.00
		Amount (Incl. VAT):	2875.00

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

Correspondent matters:

Details Narration:	KZN Lodging Agent fee	Amount (excl. VAT):	375.00
Nature:	Fee	Vatable:	\checkmark
Narrative for VAT-only entry (if required):		VAT Amount	56.25
		Amount (Incl. VAT):	431.25

Developments:



Details			
Narration:	To Tariff fee for drawing Form W	Amount (excl. VAT):	230.00
Nature:	Fee 🗸	Vatable:	
Narrative for VAT-only entry (if required):	To VAT on fee for drawing Form W	VAT Amount	34.50
		Amount (Incl. VAT):	264.50

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:

Firm Settings	*	Bonds			
 Our Branches (6) Trust Accounts (10) 		New Delete	👚 Move up 🛛 🖶 Move down Revert 🔲 Include inactive items?		
		Source	Source Description		
Users	≽	filter text 🛛 🍸	filter lext		
My Settings	¥	System	Fee		
Common	¥	User Modified	Lodging agent's fee		
		User Modified	HomeOwners Association consent fee		
Bonds	×	User Modified	Fee Reduction		
Transfers	¥	System	FICA identification and verification fee		
	¥	User Modified	To Postage, petties and telephone		
Consents	*	User Modified	Lodging agent's posts and petities		
Correspondent Conveyancing	×	User Modified	Fee for preparing Surety		
Developments	¥	User Modified	Fee for preparing Surety and Pledge		
bereiopinento		User	Fee for preparing surety for housing scheme		
Advanced Settings		User Modified	Fee for preparing cert of right of leasehold		
Account Items	*	User Modified	To Stamp Duty on Bond		
Bonds		User Modified	Deeds Office Fee		
Consent Correspondent		General	To Dearde Nifine Search Fee		
Development			Description: * Fee Amount: Bond.ActualFee		
▷: Transfer (56)			Code: * TARIFFFEE Vatable: 🔽		
Messages	¥		Nature: Fee		
Milestone Process Configurat.	×		Lefe		
whestone Process Conligurat.	Ť				
		Ad hoc	account item?		
		Criteria:			
		Narrations			
		Narrati	on Debit (Eng): To our fees for taking instruction, drawing Power o		
		Narra	tion Debit (Afr): Aan ons gelde vii neem van opdrag en opstel van		
		-			

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

- System:
 - \circ $\;$ These are the default account items available in Lexis Convey.
- User Modified:



 \circ $\;$ These are the System account items that are modified by changing data on the item.

- User:

 \circ $\;$ 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 gird. 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	💧 懀 Move up	p 🖡 Move down Revert 🗖 Include inactive items?			
Source	Description			<u> </u>	
filter text 🌱				7	
System	Fee				
User Modified	Lodging agent's	s fee			
User Modified	HomeOwners A	ssociation consent fee			
User Modified	Fee Reduction				
System	FICA identificati	on and verification fee			
User Modified	To Postage, pe	tties and telephone			
User Modified	Lodging agent's	s posts and petties			
User Modified	Fee for preparin	ig Surety			
User Modified	Fee for preparin	ig Surety and Pledge			
User	Fee for preparin	g surety for housing scheme			
User Modified	Fee for preparin	ig cert of right of leasehold			
User Modified	To Stamp Duty				
User Modified	Deeds Office Fe	ee			
System	To Deeds Offic				
User	Stamp Duty on	Guarantees			
- General	o. 1.				
	Description: *	FICA identification and verification fee	Amount:	IfTrue(Bond.FICAFee=0,IfTrue(Bond.MortgagorType<2,IfTrue(Bond.Grou	
	Code: *	FICAFEE	Vatable:		
	Nature:	r •			
	(Talato)	ree			
Ad hoo	c account item?∏				
	Criteria: IITrue([Bond.GroupCode="STD") OR NOT(Bond.FICAFeePayable),False,True)				
Narrations					
Narrati	ion Debit (Eng):	To FICA identification and verification fee			
Narra	ation Debit (Afr):	Aan FICA identifikasie en verifikasiefooi			

Bonds New Delete	1 Move	up 🛛 🖊 Move down 🔹 Revert 🗖 Include inactive items?			
Source	Description				•
filter text 🌱				7	
System	Fee				
User Modified	Lodging agen	's fee			
User Modified	HomeOwners	Association consent fee			
User Modified	Fee Reduction	1			
System	FICA identifica	tion and verification fee			
User Modified	To Postage, p	etties and telephone			
User Modified	Lodging agen	's posts and petties			
User Modified	Fee for prepar				
User Modified		ing Surety and Pledge			
User		ing surety for housing scheme			-
User Modified		ing cert of right of leasehold			
User Modified	To Stamp Dut				
User Modified	Deeds Office				
System		ce Search Fee			
User	Stamp Duty or	n Guarantees			•
General					1
	Description: *	Fee for preparing surety for housing scheme	Amount:	FirmDetails.SuretyFee	
	Code: *	HOUSINGFEE	Vatable:		
	Nature:	Fee			
Ad hoc	Ad hoc account item?				
- Narrations					۲ ۲
Narrat	ion Debit (Eng):	To preparation of Suretyship for Housing Scheme			
Narra	ation Debit (Afr):	Aan voorbereiding van behuisingskema 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:
 - \circ 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.
 - \circ 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: IfTrue(Bond.SpecialSurety1Ind AND Not(FirmDetails.SuretyFee=0),True,False)



🏛 Criteria builder	×	
Criteria		
Criteria:	•	
Criteria preview:	Property Type - Conventional Property Type - Sectional Property Type - Leasehold Branch - Bellville - LS	
	Branch - Gordons Bay - CR Branch - Parklands - JT Branch - Plumstead - CH Branch - Rondebosch - DH	ŀ
	Branch - Wynberg - NT Institution - ABSA Bank Limited Institution - ABSA Commercial Property Finance	
ΈΕ	Institution - Afgri Operations Ltd Institution - Albaraka Bank Limited Institution - Afric Oil (Pty) Ltd Institution - BoE Private Bank	
	Institution - Business Partners Limited Institution - Deloitte & Touche Institution - Eskom Finance Company SOC Ltd	
	Institution - FNB Comm (LCS) Institution - FNB Commercial Property Finance Institution - Ferrobond (Pty) Ltd	
	Institution - FirstRand Bank Limited Institution - FNB Private Clients (Lotus Notes) Institution - Greenstart Home Loans Proprietary Limited	
	Institution - IDC of SA Ltd Institution - Nedbank Business Banking Professional	
	Institution - Imperial Bank Limited	•

- 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



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- 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:	TARIFFFEE	Vatable: 🔽	
Nature:	Fee		
Description:	* Fee Reduction	Amount: ((Bond.ActualFee + Bond.LodgingAgentFee) * Bond.FeeReduction/100	I)*-1
Code: *	FEERED	Vatable: 🔽	
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.

Г	General				
	Description: *	To purchase price	Amount:	Transfer.PurchasePrice	
	Code:	PURCHPRICE	Vatable:		
	Nature:	Journal			
	Post to this account: *	Transferee			
	Ad hoc account item?				
	Criteria:	Transfer.ProformaPrintedInd AND Not((Transfer.CauseOfActionCode=5) OR	(Transfer.CauseOfActionCode=6) OR	(Transfer.CauseOfActionCode=7))	
L					



Narrations group box:

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

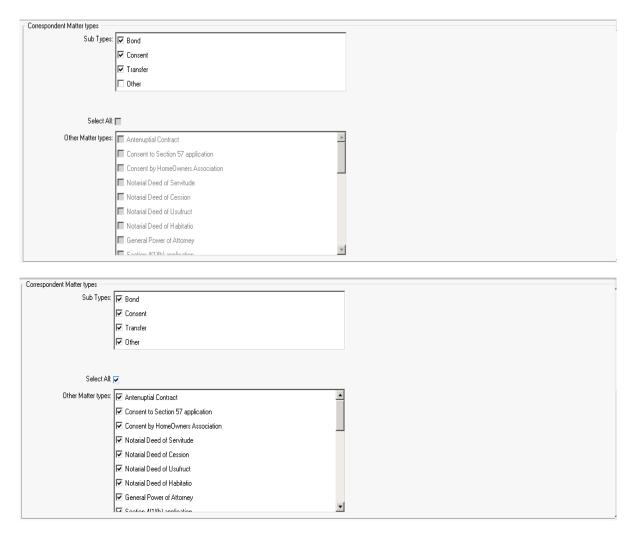
- Narration Debit (Eng):
 - This is the English narrative of the debit account item entry based on the matter language and will display on the Statement of Account accordingly.
- Narration Debit (Afr):
 - This is the Afrikaans narrative of the debit account item based on the matter language and will 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.





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.



My Settings	¥	^ Transfer	Transfer		
Common	¥	New Dele	te 🛛 👚 Move up 🔹 🗸 Move down 🔹 Revert 🔲 Include inactive items?		
Bonds	¥	Source	Transaction Code		
Transfers	¥	filter text	r filter text		
Consents	¥	System	TARIFFEE		
Correspondent Conveyan	×	System	TARIFFFEERED		
Correspondent Conveyan	*	System	TRANSFERDUTY		
Developments	≽	System	AGENTSCOMMISSION		
Advanced Settings		System	DEEDSFEE		
Advanced Settings		System	DEEDSEARCH		
Account Items	*	System	P&P		
▲ Transfer (54)	^	User	TBS		
TARIFFFEE		System	FICAFEE		
TARIFFFEERED TRANSFERDUTY	10	System	PURCHPRICE		
AGENTSCOMMISSION		System	DEPOSIT		
DEEDSFEE		System	PROCEEDSOFBOND		
DEEDSEARCH		System	TRANSFERELECFEE		
P&P TBS		System	BALOFPURCHPRICE		
FICAFEE		System	TRANSFERDUTYSUBMISSIONFEE		
PURCHPRICE		System	DISCHARGEBONDAMOUNT		
DEPOSIT		System	VATONPURCHPRICE		
TRANSFERELECFEE System VATONPURCHPRICEPAID BALOFPURCHPRICE System TRANSFERDUTYPENALTY		VATONPURCHPRICEPAID			
		System	TRANSFERDUTYPENALTY		
TRANSFERDUTYSUB		System	RATESCLEARANCE		
DISCHARGEBONDAMC VATONPURCHPRICE VATONPURCHPRICEP.		System	LEVYCLEARANCE		
		System	ARREARBATES		
TRANSFERDUTYPEN		System	LEGALCOSTS		

Selecting the Transaction Code line item:

Firm Settings	*	PURCHPRICE - Line Items			
Users	¥	New Delete 🛉 Move u	p 📕 Move down 🛛 Revert 🗖 Inclus	le inactive items?	
My Settings	¥	Source Description			
Common	×	filter text 🌱 filter text			7
Bonds	×	User Modified To purchase pri	ice		
		User Modified By purchase pri	ice		
Transfers	×				
Consents	×				
Correspondent Conveyan	¥				
Developments	¥				
Advanced Settings					
Account Items	*				
 Transfer (53) PURCHPRICE 	•	- General			
DEPOSIT			To purchase price	Amount	Transfer.PurchasePrice
PROCEEDSOFBOND			PURCHPRICE	V-1-11-	
TRANSFERELECFEE BALOFPURCHPRICE				Vatable:	
TRANSFERDUTYSUE		Nature:	Journal 🔻		
DISCHARGEBONDAM VATONPUBCHPBICE		Post to this account: *	Transferee •		
VATONPURCHPRICE		Ad hoc account item?			
TRANSFERDUTYPEN	lα				
TRANSFERDUTY AGENTSCOMMISSIO	d.		Transfer.ProformaPrintedInd AND Not((Transfer.Ca (Transfer.CauseOfActionCode=7))	useOfActionCode=5) OR (Transfer.Cau	useOfActionCode=6) OR
RATESCLEARANCE					
LEVYCLEARANCE		- Narrations			
ARREARRATES LEGALCOSTS		Narration Debit (Eng):	To purchase price	Narration Credit (Eng):	
ADVERTCOSTS					
OTHERCOSTS		Narration Debit (Afr):	Aan koopprys	Narration Credit (Afr):	
TARIFFFEE	• *	Narration for VAT - only entries (Eng)		Narration for VAT - only entries (Afr):	



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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.

🛅 Lexis Convey	×
New transaction code:	PLUMBING
	OK Cancel

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

PLUMBING - Line Items			
New Delete 1 Move	up 📕 Move down Revert 🗖 Include inactive items?		
Source Description			
filter text 🌱 filter text			Y
User [New Account	ing Item Template]		
General			
Description: *		Amount	
Code:	PLUMBING	Vatable:	
Nature:	•		
Post to this account: *			
Ad hoc account item?			
Criteria:			
			_
Narrations		Narration Credit (Eng):	
Narration Debit (Afr):		Narration Credit (Afr):	
Narration for VAT - only entries (Eng):		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 I Include inactive items?		
Source De	escription		
Iller lext 7 file			7
	Plumbing Evaluation Completed Fee		د
	Plumbing Evaluation Completed Fee		
General			
De	escription: * To Plumbing Evaluation Completed Fee	Amount	1000
	Code: PLUMBING	Vatable:	-
	Nature: Fee		
Post to this	s account: * Transferee		
	count item?		
Ad hoc acc	Criteria:		
	Circena:		
Narrations			
Narration E	Debit (Eng): To Plumbing Evaluation Completed Fee	Narration Credit (Eng):	
Narration	Debit (Afr): Aan Loodgieter Evaluasie Voltooi Fooi	Narration Credit (Afr):	
Narration for VAT	only entries	Narration for VAT - only entries	
	(Eng):	(Afr):	

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

PLUMBING - Line Items			
New Delete 🕇 N	love up 🛛 🐺 Move down 🔹 Revert 🗖 Include inactive items?		
Source Descript			
filter text Y filter text			7
	ing Evaluation Completed Fee		1
	ing Evaluation Completed Fee		
- General	orr. * To Plumbing Evaluation Completed Fee	Amount	Balance
(Code: PLUMBING	Vatable:	
N	ature: Fee 🔹		
Post to this acco			
Ad hoc account Cr	teria:		<u></u>
- Narrations			
Narration Debit (Eng): To Plumbing Evaluation Completed Fee	Narration Credit (Eng):	
Narration Debit	(Afr): Aan Loodgieter Evaluasie Voltooi Fooi	Narration Credit (Afr):	
Narration for VAT - only e	ntries Eng)	Narration for VAT - only entries (Afr):	



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

PLUMBING - Line Items			
New Delete 🕇 Mov	ze up 🛛 🐺 Move down Revert 🗖 Include inactive items?		
Source Description	ı		
filter text 🛛 🍸 filter text			Y
	g Evaluation Completed Fee		
User By Plumbin	g Evaluation Completed Fee		
_ General			
Description	π * By Plumbing Evaluation Completed Fee	Amount	Balance
Co	de: PLUMBING	Vatable:	
Natu	re: Fee		
Post to this accoun	t * Fim		
Ad hoc account ite			
Crite			
Cinc			
Narrations			
Narration Debit (En	g):	Narration Credit (Eng):	By Plumbing Evaluation Completed Fee
Narration Debit (A	fr):	Narration Credit (Afr):	Per Loodgieter Evaluasie Voltooi Fooi
Narration for VAT - only entr (Er	ies Igj:	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	*	Templates			
 Our Branches (6) Trust Accounts (10) 		New Export Edit Revert Delete Import			
		Filename	🔺 Туре	Link Folder	
Users	×		🍸 filter text	T liller lext	
My Settings	×	∃ Source: System (55 items)			
Common	*	Source: User modified (2 items)			
Attorney Firms (26) Comments	- 1	Account Discount Narration.gd (Afrikaans)	Other	English	
Conveyancers	- [Account Discount Narration.gd (English)	Other	Afrikaans	
Conveyancers Conveyancing Areas Deeds Offices Developers Estate Agencies (27) Homeowners Associations Our References Recipient Roles					
Templates					
Township Descriptions	- 1				



	unt Dis	scoun	t Narrat	ion.ge	d (Eng	lish)																
File E	Edit	View	Insert	For	rmat	Table	e															
	3		¥ 1	b	<u></u>		9	C		¶	100%		· E			1		Ŧ	===			*
<u>A</u>				- T	imes N	ew Ro	man	-	10	-	в	.	Z	_U	•	≣	-	≣	1			‡≡
	8 .	1 1	2 1	3	i 4	ı 5	1	6 I	7	8	ı 9	1 1	0 1	11 1	12	1 13	1	14	l∆ 15	ı 16	1 1	7
F	[Deso I at [D	criptio F AC	unting n of Dis count nt Perce	ing :	ted Ite Item	m of . Des	Accou scrip	nting tion	ltem Is F	Desc Perc	ription] entag											

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:		Transfers	General
			- General
		Account Items (1)	
		General	Postage and petties amount: 130.00
		Borer Contractors	Deed search fee: 50.00
			Transfer duty application fee: 0.00
			FICA fee transferor individual: 100.00
			FICA fee transferor juristic: 200.00
			FICA fee transferee individual: 300.00
			FICA fee transferee juristic: 400.00
After:			
Firm Settings	×	Transfers	
Users	¥	Defaults	
My Settings	×	Signatory Description (English):	%[Party.AuthSig] in my capacity as %[Party.Capacity] and duly authorised hereto by %[Party.Name] %[Party.RegNo]
Common	¥		
Bonds	×	Signatory Description (Afrikaans):	%[Party.AuthSig] in my hoedanigheid as %[Party.CapacityA] en behoorlik daartoe gemagtig deur %[Party.Name] %[Party.RegNo]
Transfers	*		
 Account Items (56) Borer Contractors Electrical Contractors Estate Management Compani 		General Personal and Solvency Affidavits for individuals combined:	v
Managing Agents	ies	Default our ref:	•
Municipalities Notaries		Postage and petties amount:	130.00

Firm Settings	×	Transfers	
Users	¥	- Defaults	
Users	*	Signatory Description (English):	%[Party.AuthSig] in my capacity as %[Party.Capacity] and duly authorised hereto by %[Party.Name] %[Party.RegNo]
My Settings	×		το προσποτισμόν και τη στη τη στη τη στη στη στη στη τη
Common	×	Signatory Description	%[Party.AuthSig] in my hoedanigheid as %[Party.CapacityA] en behoorlik daartoe gemagtig deur %[Party.Name] %[Party.RegNo]
Bonds	×	(Afrikaans):	
Transfers	*	General	
 Account Items (56) Borer Contractors Electrical Contractors Estate Management Compani 	ies	Personal and Solvency Affidavits for individuals combined:	
Managing Agents		Default our ref:	
Municipalities Notaries		Postage and petties amount:	130.00
Print List Templates (4)		Deed search fee:	50.00
Title Deed Institutions ▷ User Categories (3) Variables		Transfer duty application fee:	0.00
		FICA fee transferor individual:	100.00
Consents	*	FICA fee transferor juristic:	200.00
Correspondent Conveyancing	*	FICA fee transferee individual:	300.00
Developments	Ť	FICA fee transferee juristic:	400.00
Advanced Settings		Deceased Estate / Divorce Powe	r of Attorney
Account Items	×	Commences with:	I the undersigned
Messages	×	Narratives on balancing entries	
Milestone Process Configurat.	×	Debit Balance (English):	To amount due to you
_		Credit Balance (English):	By amount due by you
		Debit Balance (Afrikaans):	Aan bedrag verskuldig aan u
		Credit Balance (Afrikaans):	Per bedrag verskuldig deur u
		- Authority to Invest	
		Fee disclosure (English):	
		Fee disclosure (Afrikaans):	



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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:	ABSA BANK LIMITED 🔹	
----------------	---------------------	--

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:	1000000.00
Fee reduction amount:	0.00

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:	18860.00	
Percentage reduction on fee:	10.00	
Fee reduction amount:	1886.00	
	[OK Cancel

The Bond Quotation Calculator:



Bond Quotation Calculator		×
Institution:	ABSA Bank Limited	·
Date received:	2019/10/15	3
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:	100000.0	D
Fee reduction amount:	750.00	
Rank of bond:	1 🗘	
Required when printing the quotat	ion:	
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 Calcula	tor	×
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:		
Lodging agents post and petties:		
Fee reduction amount:	0.00	
FICA fee Transferee:		
Required when printing the quotat		
Transferee language:		
	English *	
Transferee name:		
Short property description:		
Complete for SMS quotations only	:	
Contact Name at your firm:		
	Calculate	

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.



Description	Amount	VAT	Subtotal
filter text 🌱	filter text 🌱	filter text 🌱	filter text 🦷
To our fees for taking instruction, drawing Power of Attorney	18860.00	2829.00	21689.0
By reduction in fees by 10.00%	-1886.00	-282.90	-2168.9
To postages, petties and telephone	200.00	30.00	230.0
To Deeds Office Fee	1020.00	0.00	1020.0
To Deeds Office Search Fee	200.00	30.00	230.0
To Electronic Document Generation Fee	55.00	8.25	63.2
TOTAL (incl VAT)			R 21063.3

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 i	tem				×
Details					
Description:	Custom	• (i)	Amount (excl. VAT):	0.00	
Narration:	[New account item]	C	Vatable: 🖟		
Nature:		•	VAT Amount:		0.00
Narrative for VAT-only entry (if required):			Amount (Incl. VAT):		0.00
				OK	Cancel

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 i	tem		×
_ Details			
Description:	Custom 🔹	Amount (excl. VAT):	0.00
Narration:	Custom Insurance Certificate Fee	Information:	
Nature:		List of line items marked as 'ad hoc' in setup	0.00
Narrative for VAT-only entry (if required):		Amount (Incl. VAT):	0.00
			OK Cancel

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.

Т	Master Transfer	¥	Transferee						
	Financial		New Delete 1 1 Move u	ip 🛛 🖶 Move down 👘 Hid	e Discount				
⊜	SARS		Narration	Amou	unt V/	л	Total	Balance	
R	Final Accounts	*	(Custom Account Item)		0.00	0.00	0.00		0.00
Tra Tra Firr									
	Progress Dates								
Ð	Matter Comments								
0	Attached Documents		Details Description:	Custom		Amount (excl. VA1	T):	0.00	
				(Custom Account Item)	C		e: Vatable: Exclusive		-
									0.00
				Disbursement	· · · · · · · · · · · · · · · · · · ·	_			
			Narrative for VAT-only entry (if required):			Amount (Incl. VAT	T):		0.00
			Party:	Transferee		Í.			
			Balancing Entry			-			1
			Description:	Custom		Amount (excl. VAT	T):	0.00	
			Narration:	(Custom Account Item)	<u>C</u>	Vat Typ	e: Vatable: Exclusive		•
			Nature:	Disbursement	•	VAT Amour	nt:		0.00
			Narrative for VAT-only entry (if required):			Amount (Incl. VAT	T):		0.00
			Party:	Firm	•	•			

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.

	📶 Rename template 'Deeds Office Matter States 19112015.rtf'	<
•	Please note: Special characters e.g. *\/k> are not allowed.	
1	Template file name: * Deeds Office Check list 19112015	
	OK Cancel	

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)		
Import - Export Edit Revert Delete		
Filename	Link Folder	
	7 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	
AffEnd.rtf	Afrikaans	
AffEndCor.rtf	Afrikaans	
AffidavitEnding.rtf	Afrikaans	
AffidavitEndingSpouse.rtf	Afrikaans	
Agreement.rtf		
Application Form.rtf		
Application/Version.rtf	Afrikaans	
ApplItoReg4(1)(b).rtf	Afrikaans	
Appoint.rtf	Afrikaans	
AuthorityCompInterestClause.txt	Afrikaans	
AuthorityInterestClause.txt	Afrikaans	
BEEDiscountConfirmationLetter.rtf	Afrikaans	

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



LetterToMortBon	Convirt	
LetterToMortgag	Go to linked template	*********
LetterToMortLod	Copy template	
LetterToMortReg	Filter	
ListOfMortgagors	Copy text	
ListOfMortnanors	WithAuthPersonID txt	

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

Agreement Conditions.rtf Transfers	Transfers		Inter text	
Source: User (3 items)		C C (101)		Y filter text
		Source: System (461 items)		
Agreement Conditions.tf Transfers		Source: User (3 items)		
	Transfers	Agreement Conditions.rtf		Transfers
Deed Conditions - Western Cape.rtf Transfers	Transfere	Deed Conditions - Western Cape.rtf		Transfers
Deed Conditions.rtf Transfers	Transfers	Deed Conditions.tf		Transfers
Lexis Convey	×		Unable to rename 'De Western Cape.rtf'. A t	eed Conditions.rtf' to 'Deed Conditions - template with the filename 'Deed n Cape.rtf' already exists in this folder.

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.

B	nglish		
In	nport 👻	Export	Edit
	Import n	ew	
	Import o	ver existing	
	Copy fro	m existing	

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



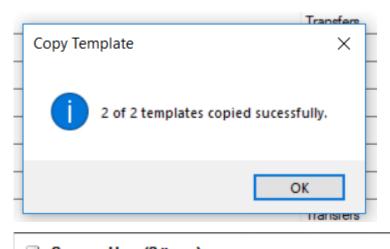
English						
Import - Export Edit Revert [Delete					
Filename		Link Folder	Suite			
filter text	Y	r filter text		' filter text		
Source: System (461 items)						
15B(3)C AFFIDAVIT.RTF		Afrikaans	Transfers			
42(2) Cert.RTF		Afrikaans Afrikaans Afrikaans		Transfers Transfers		
Account (Fees Disb VAT).rtf						
Account(AmountAndVAT).tf				Transfers		
Account(VAT Debit Credit).rtf		Afrikaans		Transfere		
Account(VATandAmount).rtf		🏛 Copy template		×		
Account.rtf		Select folder:	•	•		
AccountingOfficer's - Auditor'sAffidavit.rtf AccountQuote.rtf			Afrikaans			
Affidavitito Section 9(20).rtf			icel			
Affidavitito Section 9(20) Spouse .tf Agreement - Agency .tf Agreement - Agent .tf Agreement .tf All Buyer Resolutions .RTF All Resolutions .RTF			Conditions Conditions\Divorces			
		Afrikaans	- Conditions Divorces Conditions Donations			
		Afrikaans	Conditions\New			
		Afrikaans	Conditions\Will			
		Afrikaans	 English\FastFill English\Lookups 			
		Afrikaans	Preambles			
All seller affidavits.RTF		Afrikaans	Preambles\EUA			
All seller Resolutions.RTF		Afrikaans		Transfers		

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

English Import - Export Edit Revert Delete							
Filename	▲ Link Folder	 Link Folder 		Suite			
	🝸 filter text	Y filter text		Y filter lext			
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).ttf	Afrikaane			Transfere			
Account(VATandAmount).rtf	Copy temp	ate			×		
Account.rtf		Select folder: *	Conditions				
AccountingOfficer's - Auditor'sAffidavit.rtf		Select template: * Agreement Conditions.rtf (SAMPLE HomeOwner's C SAMPLE Usufruct Deed C					
AccountQuote.ttf				nglish)			
Affidavitito Section 9(20).rtf				eOwner's Condition.rtf (English)			
Affidavitito Section 9(20) Spouse.rtf							
Agreement - Agency.rtf				Condition - ENG.ttf (English)			
Agreement - Agent.rtf							
Agreement.rtf		SAMPLE Usufruct PA Condition - AFR.rtf (Afrikaans)					
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.tf		l					
App 68(1) Lost Deed.rtf							
AppforTrfImmovableProperty.RTF				OK Ca	ancel		

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.

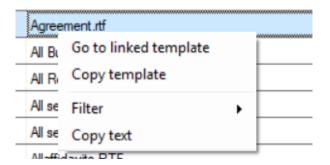




Source: User (2 items)					
	Agreement Conditions.rtf				
	SAMPLE Usufruct Deed Condition - ENG.rtf				

Templates: Copy Template

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





Import - Export Edit Revert I	Delete		
Filename		Link Folder	Suite
filter text	Y	filter text	filter text
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		m Copy Template	×
Account(VATandAmount).rtf			
Account.rtf		Please note: Special characters e.g. *//<> an	e not allowed.
AccountingOfficer's - Auditor'sAffidavit.rtf		Template file name: * Copy - Agreement	
AccountQuote.rtf			
Affidavitito Section 9(20).rtf			OK Cancel
Affidavitito Section 9(20) Spouse .rtf			Iransiers
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			Transfers

"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.

Hansierur Feisunai Aniuavit.n FF	Milkad	
Transferor Resolution Section 112 and 115.tf	Afrikaa Copy Template	×
Transferor Sale in Execution Affidavit.RTF	Afrikaa	[
Transferor Special Power of Attorney - Notarial Deed.RTF	Afrikaa Successfully copied 'Agreement.	rtf' to 'Agreement Phase 2.rtf'.
Transferor Spouse FICA Affidavit.ttf	Afrikaa	
Transferor Spouse Personal Affidavit.RTF	Afrikaa	
Transferor Surviving Spouse Personal Affidavit.RTF	Afrikaa	ОК
Transferor Trustee Affidavit.RTF	Afrikaans	Itansiers
TransferorResolution.RTF	Afrikaans	Transfers
TransferPaths.tf	Afrikaans	Transfers
Translation Pairs.txt		Transfers
TrustCertTransferee.RTF	Afrikaans	Transfers
TrustCert Transferor.RTF	Afrikaans	Transfers
VAT CLEARANCE.RTF	Afrikaans	Transfers
VAT249NEWAttomeyUndertaking.RTF	Afrikaans	Transfers
WaiverOfExtension.rtf	Afrikaans	Transfers
YoursFaithfully.tf	Afrikaans	Transfers
Source: User (3 items)		
Agreement Conditions.ttf		Transfers
Agreement Phase 2.rtf		Transfers



In matter Conditions View functionality: Transfers and Developments

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

Section 21 SS HIGH CAPE THREE									
New 🔹 Delete 🏻 🏠 Move up 🛛 🖶 Move down 🦳 Rates Clearance 🗣	•								
Section Deed Conditions PA Conditions Preambles Will conditions									
Available Conditions:	Selected Conditions								
 □ ↓ Transfer Conditions ● ↓ Divorces ● ↓ Donations ● ↓ Will ■ SAMPLE HomeOwner's Condition.rtf ■ SAMPLE Usufruct Deed Condition - AFR.rtf ■ SAMPLE Usufruct PA Condition - ENG.rtf ■ SAMPLE Usufruct PA Condition - ENG.rtf ■ SAMPLE Usufruct PA Condition - ENG.rtf 	Add Add Bemove Up Down Edit Manage Refresh								

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

			(Security document received) ytime Milestones + Send/Receive + Lexis WinDeed + Rates	s Clearan	ice 🗸 Li	exis Tracker - SARS - Accounting -
💼 Miles	stone Summary	Section	21 SS HIGH CAPE THREE			
		New +	Delete 🔺 Move up 👢 Move down Rates Clearance 👻			
	sfer Details *					
Correspon Transferor			ed Conditions PA Conditions Preambles Will conditions			
	e Webb	Available Co				Selected Conditions
Transferor Transferee	r Descriptions	🗄 📁 Trai	nsfer Conditions		Add	SAMPLE HomeOwner's Condition.rtf
Mary H				1	Bamaua	
Transfere	🋅 Transfer Templ	ates				_ 🗆 🗙
Signing D Propertie:	Transfer Templates	*	Conditions			
Secti Property I			Import - Export Edit Revert Delete			
Fina	Lookups		Filename	– ≜ Li	ink Folder	
-	Conditions (3) Divorces		filter text	7 h		7
SAR	Donations		😑 Source: System (5 items)			
_	 English (2) 		SAMPLE HomeOwner's Condition.rtf			
🖹 R Fina			SAMPLE Usufruct Deed Condition - AFR.rtf			
Transfere			SAMPLE Usufruct Deed Condition - ENG.rtf			
Transferc Firm	EUA		SAMPLE Usufruct PA Condition - AFR.rtf			
_			SAMPLE Usufruct PA Condition - ENG.rtf			
Mes						
= Matt						
Atta						
_						
Matt						
						ок
		_				



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 De Source	elete Revert	Group		C		Desidellar
				Sequence		Description
	Y		Y	filter text	Y	
SR		REPORTS				Fee Report 01
SR		REPORTS				Monthly Report - Selected Reference 1
SR		REPORTS				Monthly Report - Selected Reference01
SR		REPORTS				Sectional Scheme Report1
SR		REPORTS				Serfontein Viljoen Progress report
SR		LODGEMENT				Agreement Phase 3
SR						
Document Det						
	Group: *				▼	
	Sequence	:				
	Description: *	•				
	Description.					
	Criteria					
	Setup command	:				
	Language	:			•	
	Number of copies	1				
	Item name	:				
	Collection name					
	Collection name				~	

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	Rever	t				
Source		Group	Sequen	~		Description
				ue -		
	Y	filter text	I filter text			1 filter text
USR		REPORTS				Fee Report 01
JSR		REPORTS				Monthly Report - Selected Reference 1
USR		REPORTS				Monthly Report - Selected Reference01
USR		REPORTS				Sectional Scheme Report1
USR		REPORTS				Serfontein Viljoen Progress report
USR		LODGEMENT				Agreement Phase 3
USR		LODGEMENT				Agreement Phase 2
	Group	Lodgement 1200		•		
	Group.	Lougement 1200		•		
	Sequence					
	Description	* Agreement Phase 2			_	
	Description.	Agreement Phase 2			_	
	Criteria	80				
Se	etup command	i:				
	Language	: Transfer. TransferorLanguage			_	
	canguage	nanarer, nanarerer zanguage			•	
Nur	mber of copies	e 1				
	Item name				_	
	item name					
C	ollection name				~	
Ci Document code Print List				Start typing to find tem	- D	ed in the 'English' and 'Afrikaans' tabs
Document code	(excluding .rtf			Start typing to find tem	- D	ed in the 'English' and 'Afrikaans' tabs
Document code Print List	(excluding .tf		Sequence	Start typing to find tem	v D	ed in the 'English' and 'Afrikaans' tabs
Document code Print List New Delete Source	(excluding .ttf		Sequence 7 litter test	Start typing to find tem	v D	
Document code Print List New Delete Source filter text	(excluding .ttf	Group filter text		Start typing to find tem	olates locat	Description
Document code Print List New Delete Source filter text USR	(excluding .ttf	Group filter text REPORTS		Start typing to find tem	v D olates locat	Description filter text Fee Report 01
Document code Print List New Delete Source filter fext USR USR USR	(excluding .ttf	Group Atter text REPORTS REPORTS		Start typing to find tem	v D plates locat	Description filter text Fee Report 01 Monthly Report - Selected Reference 1
Document code Print List New Delete Source filter text USR USR USR USR USR	(excluding .ttf	Group fiter text REPORTS REPORTS REPORTS REPORTS		Start typing to find tem	v D plates locat	Description filter text Fee Report 01 Monthly Report - Selected Reference 1 Monthly Report - Selected Reference01
Document code Print List New Delete Source filter text USR USR USR USR USR USR	(excluding .ttf	Group fiter text REPORTS REPORTS REPORTS REPORTS REPORTS REPORTS		Start typing to find tem	v D olates locat	Description <i>ifter text</i> Fee Report 01 Monthly Report - Selected Reference 1 Monthly Report - Selected Reference01 Sectional Scheme Report 1
Document code Print List New Delete Source filter text USR	(excluding .ttf	Group fiter text REPORTS REPORTS REPORTS REPORTS REPORTS REPORTS REPORTS		Start typing to find tem		Description filer text Fee Report 01 Monthly Report - Selected Reference 1 Monthly Report - Selected Reference01 Sectional Scheme Report 1 Sectional Scheme Report 1
Document code Print List New Delete Source filter text USR	(excluding .ttf	Group fiter text REPORTS REPORTS REPORTS REPORTS REPORTS REPORTS LODGEMENT		Start typing to find tem		Description filer text Fee Report 01 Monthly Report - Selected Reference 1 Monthly Report - Selected Reference01 Sectional Scheme Report 1 Sectional Scheme Report 1 Serfontein Viljoen Progress report Agreement Phase 3
Document code Print List New Delete Source filter text USR	(excluding .ttf	Group fiter text REPORTS REPORTS REPORTS REPORTS REPORTS REPORTS REPORTS		Start typing to find tem		Description filer text Fee Report 01 Monthly Report - Selected Reference 1 Monthly Report - Selected Reference01 Sectional Scheme Report 1 Serfontein Viljoen Progress report
Document code Print List New Delete Source filter text USR USR USR USR USR USR	(excluding rtf	Group Alter text REPORTS REPORTS REPORTS REPORTS REPORTS LODGEMENT LODGEMENT				Description filer text Fee Report 01 Monthly Report - Selected Reference 1 Monthly Report - Selected Reference01 Sectional Scheme Report 1 Sectional Scheme Report 1 Serfontein Viljoen Progress report Agreement Phase 3
Document code Print List New Delete Source filter text USR	(excluding rtf	Group fiter text REPORTS REPORTS REPORTS REPORTS REPORTS REPORTS LODGEMENT		Start typing to find tem		Description filer text Fee Report 01 Monthly Report - Selected Reference 1 Monthly Report - Selected Reference01 Sectional Scheme Report 1 Sectional Scheme Report 1 Serfontein Viljoen Progress report Agreement Phase 3
Document code Print List New Delete Source filter text USR	(excluding .tf	Group filter text REPORTS REPORTS REPORTS REPORTS REPORTS LODGEMENT LODGEMENT LODGEMENT LODGEMENT				Description filer text Fee Report 01 Monthly Report - Selected Reference 1 Monthly Report - Selected Reference01 Sectional Scheme Report 1 Sectional Scheme Report 1 Serfontein Viljoen Progress report Agreement Phase 3
Document code Print List New Delete Source filter text USR	(excluding rtf	Group Group Group Giter text REPORTS REPORTS REPORTS REPORTS LODGEMENT LODGEMENT LODGEMENT LODGEMENT				Description filer text Fee Report 01 Monthly Report - Selected Reference 1 Monthly Report - Selected Reference01 Sectional Scheme Report 1 Sectional Scheme Report 1 Serfontein Viljoen Progress report Agreement Phase 3
Document code Print List New Delete Source filter text USR	(excluding rtf	Group filter text REPORTS REPORTS REPORTS REPORTS REPORTS LODGEMENT LODGEMENT LODGEMENT LODGEMENT				Description filer text Fee Report 01 Monthly Report - Selected Reference 1 Monthly Report - Selected Reference01 Sectional Scheme Report 1 Sectional Scheme Report 1 Serfontein Viljoen Progress report Agreement Phase 3
Document code Print List New Delete Source filter text USR	(excluding rtf	Group Ater text REPORTS REPORTS REPORTS REPORTS REPORTS LODGEMENT LODGEMENT LODGEMENT Lodgement 1200 Agreement Phase 2				Description filer text Fee Report 01 Monthly Report - Selected Reference 1 Monthly Report - Selected Reference01 Sectional Scheme Report 1 Sectional Scheme Report 1 Serfontein Viljoen Progress report Agreement Phase 3
Document code Print List New Delete Source filter text USR	(excluding rtf	Group Ater text REPORTS REPORTS REPORTS REPORTS REPORTS LODGEMENT LODGEMENT LODGEMENT Lodgement 1200 Agreement Phase 2				Description filer text Fee Report 01 Monthly Report - Selected Reference 1 Monthly Report - Selected Reference01 Sectional Scheme Report 1 Sectional Scheme Report 1 Serfontein Viljoen Progress report Agreement Phase 3
Document code Print List New Delete Source filter text USR	(excluding rtf	Group Ater text REPORTS REPORTS REPORTS REPORTS REPORTS LODGEMENT LODGEMENT LODGEMENT Lodgement 1200 Agreement Phase 2				Description filer text Fee Report 01 Monthly Report - Selected Reference 1 Monthly Report - Selected Reference01 Sectional Scheme Report 1 Sectional Scheme Report 1 Serfontein Viljoen Progress report Agreement Phase 3
Document code Print List New Delete Source iiter text USR	(excluding rtf	Group Ater text REPORTS REPORTS REPORTS REPORTS LODGEMENT LODGEMENT LODGEMENT Lodgement 1200 Agreement Phase 2				Description filer text Fee Report 01 Monthly Report - Selected Reference 1 Monthly Report - Selected Reference01 Sectional Scheme Report 1 Sectional Scheme Report 1 Serfontein Viljoen Progress report Agreement Phase 3
Document code Print List New Delete Source filter text USR	(excluding rtf	Group Ater text REPORTS REPORTS REPORTS REPORTS LODGEMENT LODGEMENT LODGEMENT Lodgement 1200 Agreement Phase 2				Description filer text Fee Report 01 Monthly Report - Selected Reference 1 Monthly Report - Selected Reference01 Sectional Scheme Report 1 Sectional Scheme Report 1 Serfontein Viljoen Progress report Agreement Phase 3
Document code Print List New Delete Source iiter text USR	(excluding rtf	Group Ater text REPORTS REPORTS REPORTS REPORTS LODGEMENT LODGEMENT LODGEMENT Lodgement 1200 Agreement Phase 2				Description filer text Fee Report 01 Monthly Report - Selected Reference 1 Monthly Report - Selected Reference01 Sectional Scheme Report 1 Sectional Scheme Report 1 Serfontein Viljoen Progress report Agreement Phase 3
Document code Print List New Delete Source filter text USR	(excluding .tf	Group Atter text REPORTS REPORTS REPORTS REPORTS LODGEMENT LODGEMENT LODGEMENT LODGEMENT LODGEMENT				Description filer text Fee Report 01 Monthly Report - Selected Reference 1 Monthly Report - Selected Reference01 Sectional Scheme Report 1 Sectional Scheme Report 1 Serfontein Viljoen Progress report Agreement Phase 3
Document code Print List New Delete Source filter text USR	(excluding rtf	Group Atter text REPORTS REPORTS REPORTS REPORTS REPORTS LODGEMENT LODGEMENT LODGEMENT LODGEMENT LODGEMENT ICODGEMENT ICO				Description filer text Fee Report 01 Monthly Report - Selected Reference 1 Monthly Report - Selected Reference01 Sectional Scheme Report 1 Sectional Scheme Report 1 Serfontein Viljoen Progress report Agreement Phase 3
Document code Print List New Delete Source filer text USR	(excluding .tf	Group Ater text REPORTS REPORTS REPORTS REPORTS REPORTS LODGEMENT LODGEMENT LODGEMENT LODGEMENT ICUDGEMENT ICU				Description filer text Fee Report 01 Monthly Report - Selected Reference 1 Monthly Report - Selected Reference01 Sectional Scheme Report 1 Sectional Scheme Report 1 Serfontein Viljoen Progress report Agreement Phase 3
Document code Print List New Delete Source ifter text USR	(excluding rtf	Group Atter text REPORTS REPORTS REPORTS REPORTS LODGEMENT LODGEMENT LODGEMENT Lodgement 1200 Transfer.TransferorLanguage Agreement - Agency Agreement - Agent Agent Dent 20				Description filer text Fee Report 01 Monthly Report - Selected Reference 1 Monthly Report - Selected Reference01 Sectional Scheme Report 1 Sectional Scheme Report 1 Serfontein Viljoen Progress report Agreement Phase 3
Document code Print List New Delete Source filer text USR	(excluding .rtf	Group Atter text REPORTS REPORTS REPORTS REPORTS LODGEMENT LODGEMENT LODGEMENT Lodgement 1200 Transfer.TransferorLanguage Agreement - Agency Agreement - Agent Agent Dent 20				Description filer text Fee Report 01 Monthly Report - Selected Reference 1 Monthly Report - Selected Reference01 Sectional Scheme Report 1 Sectional Scheme Report 1 Serfontein Viljoen Progress report Agreement Phase 3
Document code Print List New Delete Source filter text USR USR USR USR USR USR USR Se	(excluding rtf	Group Group Ater text REPORTS REPORTS REPORTS REPORTS LODGEMENT LODGEMENT LODGEMENT LODGEMENT Transfer.TransferorLanguage Agreement - Agent Agreement Conditions - Phase 2 Agreement Conditions - Phase 2 Agreement				Description filer text Fee Report 01 Monthly Report - Selected Reference 1 Monthly Report - Selected Reference01 Sectional Scheme Report 1 Sectional Scheme Report 1 Serfontein Viljoen Progress report Agreement Phase 3
Document code Print List New Delete Source filter text USR USR USR USR USR USR USR Se	(excluding rtf	Group Ater text REPORTS REPORTS REPORTS REPORTS REPORTS LODGEMENT LODGEMENT LODGEMENT LODGEMENT Transfer.TransferorLanguage Agreement - Agent Agreement Conditions - Phase 2 Agreement Conditions - Phase 3				Description filer text Fee Report 01 Monthly Report - Selected Reference 1 Monthly Report - Selected Reference01 Sectional Scheme Report 1 Sectional Scheme Report 1 Serfontein Viljoen Progress report Agreement Phase 3



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

m PrintList - 20191010 (MJ Smith to	N Castle)	_		×
Print Preview Save	✓ Attach to matter Send ✓ Email	🌉 What's New?		
Initial Letters Electronic instruction documents Rates Documents Documents for Signature			▲ Ƴ	filter to
User Documents Additional Forms Codgement Documents On Registration - Letters and Final Acc	Lodgement Letter to Transferor			
Documents on release of deed by deed Correspondent Documents Additional Print List	Agreement Phase 2			
Additional Print List				
	<			>
		1 of 4 doc	uments selec	ted. 🚲

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:

PrintList - StandardBank/Smith			×
Print Preview Save	 Attach to matter Send Email 		
Consent Documents	Description		^
	filtertext	7	- filt
	Application and affidavit in terms of Regulation 68(11) - Bond No. 1231231		
	Consent By Bondholder In Terms Of Regulation 68(2) - Bond No. 1231231		
	Consent to other - Bond No. 1231231		
	Consents letter to acknowledge receipt of instruction		
	Letter to mortgagor		
	Proforma invoice letter		
	Refund information sheet		
	Request for guarantee letter		
	Request for Guarantee Letter (English) NedBank - Padgens Incorporated		
	Consent to Cancellation of Ceded Bond		~
	<		>

Correspondent Matters:



m PrintList - 20090409094222313		2 <u></u> 25		×
Print • Preview • Save	Attach to matter Send Email			
Lodgement Documents	Description			•
	filter text			7 filter l
	Adhoc letter			
	📝 Data sheet			
	Documents received letter			
	Documents received letter (manual)			
	Lodgement letter			_
	Proforma invoice letter			
	Registered document sent letter			
	Registered letter			_
	Up for prep letter			_
	<			>
		1 of 9 docum	ents sel	ected.

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.

Print List		
New Delete 🕇 Move up	Hove down Revert	
Source Grou	p	Description
filter text 🍸 filter t	iext 🍸	filertext
System Conse	ent Documents	Application and affidavit in terms of Regulation 68(11) - %[ExistingBond.Description]
System Conse	ent Documents	BEE discount confirmation
System Conse	ent Documents	Cancellation figures received from FirstRand Bank Housing Finance
System Conse	ent Documents	Consent By Bondholder In Terms Of Regulation 68(2) - %[ExistingBond.Description]
System Conse	ent Documents	Consent to cancellation - %[EvistingBond.Description]
System Conse	ent Documents	Consent to other - %[ExistingBond.Description]
System Conse	ent Documents	Consent to pari passu - %[ExistingBond.Description]
System Conse	ent Documents	Consent to part payment - %[ExistingBond.Description]
System Conse	ent Documents	Consent to reduction in cover - %[ExistingBond.Description]
Document Details		
Group:	Consent Documents	
Description:	* Consent to cancellation - %[ExistingBond.Des	cription]
Template	* ConsentsConsent to Cancellation 🗸	
remplate.		
Criteria	a: If True ((Consent . IsCancellation Sub Type), True	False)
Setup command	d:	
Language	e:	
Number of copies	8:	
Collection name	e: ExistingBonds v	
Item name	e: ExistingBond	
		🔬 🖄



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	Hove down Revert	
Source Group		Description
filter text 🍸 filter text	t	fiter lext Y
System Lodgem	ent Documents	Adhoc letter
System Lodgem	ent Documents	Data sheet
System Lodgem	ent Documents	Documents received letter
System Lodgem	ent Documents	Documents received letter (manual)
System Lodgem	ent Documents	Held over on prep letter
System Lodgem	ent Documents	Lodgement letter
System Lodgem	ent Documents	Proforma invoice letter
	ent Documents	Registered document sent letter
System Lodgem	ent Documents	Registered letter
	Lodgement Documents Documents received letter	
	CorrespondentConveyancingDocuments Rec	eived Letter 🗸
Criteria:	Correspondent.lsElectronicCorrespondentMat	ter AND Correspondent.LodgementDocumentsReceived
Setup command:		
Language:		
Number of copies:		
Collection name:	v	
ltem name:		



Batch Print Improvements

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

Select All Transfers Select All Documents						
FileReference	 Parties 	▲ Erf No.	Property Description	*	Document Name	
filter text	🝸 filter text	Y	🍸 filter text	Y	filter text	T

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.

Select All Transfers				Select All Documents
FileReference	 Parties 	Section No.	Property Description	Document Name
filter text	🝸 filter text	Tilter text	🍸 filter text 🌱	filter text
DecTrf07 PMB Sec + E	UA ESTATE LATE M	PULO TO 11	SECTION 11 MARTIENIQUE	Initial Letters (7 items)
DecTrf08 PMB +EUA n	o d Estate Late And	re Norma 32	Section 13 Lynnwood Manor	Initial Instructions
				Initial Letter to Transferee
				Initial Letter to Transferor
				Letter to Lodging Attorney
				Pro Forma Account
				Transferee/s Information for SARS
				Transferor/s Information for SAR5
				Documents for Signature (20 items)
				Power of Attorney
				Deed ***New!***
				Datasheet for SARS
				Pro Forma Account
				15B(3) - Conveyancer's Certificate
				Application - Transfer of Immovable Property
				Authority to Invest
				Certificate re Exclusive Use Areas
				Diary of Events
				_
atch Print for Trans	fers		0 of 2 transfers selected	HOA Accentance of Conditions 0 of 52 documents or Proview Print Car
by master transfer: A) (HEARTLAND PROP PTY LTD to A		0 of 52 documents s Preview Print Ca
by master transfer: A Select All Transfers	G 20141104103907779		DRIAN GARRETH REID) 🗸	0 of 52 documents s Preview Print Ca
by master transfer: A Select All Transfers FileReference	G 20141104103907779	Erf No.	DRIAN GARRETH REID) ~	0 of 52 documents s Preview Print Ca Select All Documents Document Name
by master transfer: A Select All Transfers FileReference	G 20141104103907779 Parties filter text	Erf No.	DRIAN GARRETH REID) Property Description T Rev text T	0 of 52 documents s Preview Print Ca
by master transfer: A Select All Transfers FileReference Wer text VG2014110410397791	G 20141104103907779 Parties Kiter text HEARTLAND PR	Erf No. 7 After text DP PTY LT 23	DRIAN GARRETH REID) > Property Description ? ?? //ker text ?? ERF 18432 SOMERSET W	0 of 52 documents s Preview Print Ca Select All Documents Document Name
by master transfer: A Select All Transfers FileReference (Rer Lext) VG2014110410397791 VG20141104102	G 20141104103907779 Parties Parties Fact text HEARTLAND PR HEARTLAND PR	CP PTYLT 23 CP PTYLT 24	DRIAN GARRETH REID) Property Description Property Description	O of 52 documents s Preview Print Ca Select All Documents Document Name //Rev text
ay master transfer: A Select All Transfers FileReference (<i>ifer text</i> (S2014110410397791 (S20141104122	G 20141104103907779 Parties Parties Fact text HEARTLAND PR HEARTLAND PR	Erf No. 7 After text DP PTY LT 23	DRIAN GARRETH REID) > Property Description ? ?? //ker text ?? ERF 18432 SOMERSET W	O of 52 documents Preview Print Ca Select All Documents Document Name All rest text Electronic instruction documents (1 item)
ny master transfer: A ielect All Transfers FileReference iker text G2014110410397791 G20141104122	G 20141104103907779 Parties Parties Fact text HEARTLAND PR HEARTLAND PR	CP PTYLT 23 CP PTYLT 24	DRIAN GARRETH REID) Property Description Property Description	O of 52 documents s Preview Print Ca Select All Documents Document Name All results Decument Name All results Electronic instruction documents (1 item) Initial Instructions
ny master transfer: A ielect All Transfers FileReference iker text G2014110410397791 G20141104122	G 20141104103907779 Parties Parties Fact text HEARTLAND PR HEARTLAND PR	CP PTYLT 23 CP PTYLT 24	DRIAN GARRETH REID) Property Description Property Description	O of 52 documents s Preview Print Ca Select All Documents Document Name All Document Name All Document Name Tribial Instruction documents (1 item) Initial Letters (6 items)
ny master transfer: A ielect All Transfers FileReference iker text G2014110410397791 G20141104122	G 20141104103907779 Parties Parties Fact text HEARTLAND PR HEARTLAND PR	CP PTYLT 23 CP PTYLT 24	DRIAN GARRETH REID) Property Description Property Description	O of 52 documents s Preview Print Ca Select All Documents Document Name After text Electronic instruction documents (1 item) Initial Letters (6 items) Initial Letters to Transferee
ay master transfer: A Select All Transfers FileReference (<i>ifer text</i> (S2014110410397791 (S20141104122	G 20141104103907779 Parties Parties Fact text HEARTLAND PR HEARTLAND PR	CP PTYLT 23 CP PTYLT 24	DRIAN GARRETH REID) Property Description Property Description	O of 52 documents s Preview Print Ca Select All Documents Document Name After text Electronic instruction documents (1 item) Initial Instructions Initial Letters (6 items) Initial Letter to Transferee Initial Letter to Transferoe
ay master transfer: A Select All Transfers FileReference (<i>ifer text</i> (S2014110410397791 (S20141104122	G 20141104103907779 Parties Parties Fact text HEARTLAND PR HEARTLAND PR	CP PTYLT 23 CP PTYLT 24	DRIAN GARRETH REID) Property Description Property Description	O of 52 documents s Preview Print Ca Select All Documents Document Name //ker text Electronic instruction documents (1 item) Initial Letters (6 items) Initial Letter to Transferee Initial Letter to Transferor Letter to Lodging Attorney
ay master transfer: A Select All Transfers FileReference (<i>ifer text</i> (S2014110410397791 (S20141104122	G 20141104103907779 Parties Parties Fact text HEARTLAND PR HEARTLAND PR	CP PTYLT 23 CP PTYLT 24	DRIAN GARRETH REID) Property Description Property Description	O of 52 documents s Preview Print Ca Select All Documents Document Name //ker text Electronic instruction documents (1 item) Initial Letters (6 items) Initial Letters (6 items) Initial Letter to Transfere
ay master transfer: A Select All Transfers FileReference (<i>ifer text</i> (S2014110410397791 (S20141104122	G 20141104103907779 Parties Parties Fact text HEARTLAND PR HEARTLAND PR	CP PTYLT 23 CP PTYLT 24	DRIAN GARRETH REID) Property Description Property Description	O of 52 documents s Preview Print Ca Select All Documents Document Name Preview Print Ca Initial Letters (6 items) Initial Letters (6 items) Initial Letters (6 items) Initial Letters to Transferee Initial Letter to Transferee Initial Letter to Transferee Initial Letter to Lodging Attorney Preview Preview Print Transferee/s Information for SARS
by master transfer: A Select All Transfers FileReference (Rer Lext) VG2014110410397791 VG20141104102	G 20141104103907779 Parties Parties Fact text HEARTLAND PR HEARTLAND PR	CP PTYLT 23 CP PTYLT 24	DRIAN GARRETH REID) Property Description Property Description	O of 52 documents s Preview Print Ca Select All Documents Document Name After text Initial Instruction documents (1 item) Initial Letters (6 items) Initial Letter to Transferee Initial Letter to Transferee Initial Letter to Transferee Initial Letter to Transferee Initial Letter to Indiging Attorney Pro Forma Account Transferee/s Information for SARS Transferer/s Information for SARS
by master transfer: A Select All Transfers FileReference (Rer Lext) VG2014110410397791 VG20141104102	G 20141104103907779 Parties Parties Fact text HEARTLAND PR HEARTLAND PR	CP PTYLT 23 CP PTYLT 24	DRIAN GARRETH REID) Property Description Property Description	O of 52 documents s Preview Print Ca Select All Documents Document Name After text Initial Instruction documents (1 item) Initial Letters (6 items) Initial Letters (6 items) Initial Letter to Transferee Transferer/s Information for SARS Transferer/s Information for SARS Documents for Signature (14 items)
by master transfer: A Select All Transfers FileReference (Rer Lext) VG2014110410397791 VG20141104102	G 20141104103907779 Parties Parties Fact text HEARTLAND PR HEARTLAND PR	CP PTYLT 23 CP PTYLT 24	DRIAN GARRETH REID) Property Description Property Description	O of 52 documents s Preview Print Ca Select All Documents Document Name Ator text Decument Name Ator text Initial Letter to Iransfero Initial Letter to Transferor Downafts for Signature (14 items) Power of Attorney
by master transfer: A Select All Transfers FileReference (Rer Lext) VG2014110410397791 VG20141104102	G 20141104103907779 Parties Parties Fact text HEARTLAND PR HEARTLAND PR	CP PTYLT 23 CP PTYLT 24	DRIAN GARRETH REID) Property Description Property Description	O of 52 documents s Proview Print Ca Select All Documents Document Name After text Electronic instruction documents (1 item) Initial Letter to Transferee Initial Letter to Transferer Pro Forma Account Transferer/s Information for SARS Transferor/s Information for SARS Power of Attorney Deed
by master transfer: A Select All Transfers FileReference filer text AG2014110410397791 AG20141104122	G 20141104103907779 Parties Parties Fact text HEARTLAND PR HEARTLAND PR	CP PTYLT 23 CP PTYLT 24	DRIAN GARRETH REID) Property Description Property Description	O of 52 documents as Preview Print Car Select All Documents Document Name After text Teters (6 items) Initial Letters (6 items) Initial Letters (6 items) Initial Letter to Transferee Initial Letter for Signature (14 items) Power of Attorney Poed Datasheet for SARS Pro Forma Account Application - Transfer of Immovable Property
by master transfer: A Select All Transfers FileReference filer text AG2014110410397791 AG20141104122	G 20141104103907779 Parties Parties Fact text HEARTLAND PR HEARTLAND PR	CP PTYLT 23 CP PTYLT 24	DRIAN GARRETH REID) Property Description Property Description	O of 52 documents as Preview Print Car Preview Print Car Select All Documents Document Name After text Initial Instruction documents (1 item) Initial Letters (6 items) Initial Letters (6 items) Initial Letter to Transferee Initial Letter to Transferee Initial Letter to Transferee Initial Letter to Transferee Initial Letter to Information for SARS Transferer/s Information for SARS Transferer/s Information for SARS Power of Attorney Deed Datasheet for SAR5 Pro Forma Account Application - Transfer of Immovable Property Authority to Invest
	G 20141104103907779 Parties Parties Fact text HEARTLAND PR HEARTLAND PR	CP PTYLT 23 CP PTYLT 24	DRIAN GARRETH REID) Property Description Property Description	O of 52 documents as Preview Print Car Select All Documents Document Name After text Distriction documents (1 item) Initial Letters (6 items) Initial Letters (6 items) Initial Letter to Transferee Initial Letter to Transferor Letter to Lodging Attorney Pro Forma Account Transferor/s Information for SARS Transferor/s Information for SARS Transferor/s Information for SARS Documents for Signature (14 items) Deed Datasheet for SARS Pro Forma Account Application - Transfer of Immovable Property Authority to Invest Consent to Transfer
by master transfer: A Select All Transfers FileReference Account 10410397791 Account 10410397791	G 20141104103907779 Parties Parties Fact text HEARTLAND PR HEARTLAND PR	CP PTYLT 23 CP PTYLT 24	DRIAN GARRETH REID) Property Description Property Description	O of 52 documents as Preview Print Car Preview Print Car Select All Documents Document Name After text Initial Instruction documents (1 item) Initial Letters (6 items) Initial Letters (6 items) Initial Letter to Transferee Initial Letter to Transferee Initial Letter to Transferee Initial Letter to Transferee Initial Letter to Information for SARS Transferer/s Information for SARS Transferer/s Information for SARS Power of Attorney Deed Datasheet for SAR5 Pro Forma Account Application - Transfer of Immovable Property Authority to Invest



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:	LWR287585203500100010004
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	<u> </u>	5	
	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:	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	D0 tracking number:	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:	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:

latter Details			
nstructing 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 🔹		
latter 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:	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	D0 tracking number:	DOTS
Comments:			
nstitution details			
Institution holding title deed:		Institution branch name:	
Branch correspondence reference:		Loan account number:	
inancial details			
Tariff:	2810.00	Lodging agent fee percentage:	15.00%

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:	E waliah		
	English		
Matter details Matter type:	Correspondent matter	Our reference: *	AdHoc
Milestone process:	Electronic Lodgement Matter	Our branch: *	Parklands - JT
	_		Tarkianus - 01
File reference: *	20190604113250015	Accounting reference:	
Date received:	2019/06/04	Expected registration date:	2019/10/08
Parties:		1 Short property description:	ERF 1 CAPE TOWN
Cause of action:	Transfer	Property type:	Conventional
Deeds Office:		D0 tracking number:	DOTS
Comments:		Reason for action:	
Commonks.		neasonnoi actori.	
- 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:	2019/10/08
Parties:	RYAN MANUEL	Short property description:	ERF 13 A CALMORE
Deeds Office:	Cape Town 🔹	D0 tracking number:	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									
 Our Branches (6) Trust Accounts (10) 		New Delete 🗖 Ir	nclude inactive ite	ms?							
	¥	Name	*	Telephone Number		Cell Number		Fax Number		Email Address	
Users	*		Y		Y		7		Y		Y
My Settings	×	[New Contact]									
Common	*	Carol Zayne		0825554789		0825554789				CaroZ@DeLange.com	
Attorney Firms [27] [New Correspondent Attorn AN Other BJ VAN DER WALT & SCH CK Friedlander Shanding V De Lange Inc Gavin Gower & Co Goldbauers, Bellville Goodrickes Green Att Hendicks and Associates Inkpen, Claremont (Dawes Inkpen, Claremont (Dawes Inkpen, Claremont (Dawes Inkpen, Town Branch ian de swart attorneyq JB Hugo & Cronje Klasas Roux Koos van Jaarseld Kothite Inc Legal Chatter (Claremont) Malfinick Inc	+ /(Jenny De Villiers		0023336985		0823336985				JennyD@DeLange.com	
	•	N	ame: *								
Bonds	*	Tel N	umber:								
Transfers	×	Cell N	umber:								
Consents	×	Fax N	umber:								
Correspondent Conveyancing	×	Email Ac	dress:								
Developments	×	Ac	dress:								
Advanced Settings											
A	~										

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			
Г	Instructing firm details			
	Firm name:	De Lange Inc 🔹 📑	Instructing file reference:	
	Contact person:	•	Cell number:	
	Tel number:	Carol Zayne Jenny De Villiers	Email address:	no-reply@lexisnexis.co.za
	Fax number:			
	Name and address:			
	Language of matter:	English 🔹		
	Matter Details			
	Instructing firm details			
		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 🔹 💽	Instructing file reference:	
Contact person:		Cell number:	0823336985
Tel number:	Carol Zayne Jenny De Villiers	Email address:	JennyD@DeLange.com
Fax number:			
Name and address:			
Language of matter:	English 🔹		

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

Matter Details			
Instructing firm details			
Firm name:	Justin Attorneys	Instructing file reference:	A000224
Contact person:	Tania May	Cell number:	
Tel number:	0216589700	Email address:	no-reply@lexisnexis.co.za
Fax number:			
Name and address:	Korbitec P 0 Box 243 Newlands 7725		
Language of matter:	English		
Matter details			
Matter type:	Correspondent matter	Our reference: *	AdHoc 🔹
Milestone process:	Electronic Lodgement Matter	Our branch: *	Bellville - LS
File reference: *	612277722800100010004	Accounting reference:	
Date received:	2019/10/17	Expected registration date:	2019/10/19
Parties:	JOINT VAN DER MERWE MR EA & FERREIRA MISS ME 7 ABSA	Short property description:	Unit 11, SS WENDY GARDENS
Cause of action:	New	Property type:	
Deeds Office:	Bloemfontein	D0 tracking number:	DOTS
Comments:			
Institution details			
Financial institution name:	ABSA	Institution branch name:	Hout Bay
Loan account number:	0000008059352030001		
Debt type:	Home Loan	Rank of bond:	1
Financial details			
Registered bond amount:	160000.00	Additional sum:	32000.00
Tariff fee:	6540.00	Lodging agent fee percentage:	5.00%
		Lodging agent fee:	327.00
L			

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	Additional DOTS Numbers				
Matter Type	Bond	Matter Type	DOTS Number	Deed Tracker Status			
		This Matter					
Correspondent matter		в	08000000000	Lodged			
Date Received	08/08/2019	Related Matters					
		т	08000000001	To Lodge On			
		т	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 Forms: New Edit Delete Additional Form DOTS Number DeedTracker Status Notes Application ito 51(2) (Lost Title Deed) 080012345690 Awaiting confirmation.	Additional Forms				
	Additional Form	x New Edit Delete			
Application ito 51(2) (Lost Title Deed) 080012345690 Awaiting confirmation.		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:	DOTS
DeedTracker Status:	
Notes:	
	OK Cancel



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

🏛 Add Additional Form	
Additional Form:	▼
DOTS Number: DeedTracker Status: Notes:	Application ito 51(2) (Insolvent Estate Deed) Application ito 51(2) (Lost Title Deed) Application ito 43(1) Certificate of Registered Title (Subdivision) Application ito Section 4(1)(b) Application ito 68(1) (Lost Title Deed) Application and Certificate of Consolidated Title Certificate of Registered Title ito Section 43 (Subdivision) Regulation 68(8) Section 62(3) - Public Auction
	OK Cancel

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:	New Edit Delete			
		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.

🏛 Add Additional Form		×
Additional Form:		
DOTS Number:	Application ito Section 4(1)(b) Regulation 68(1) - Bond G20170419141827676 Regulation 68(8) - Bond G20170419141827676	
DeedTracker Status:		
Notes:		
]
	OK Car	ncel



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

Additional Forms						
	Additional Forms: New Edit 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: *	TWD-Dev
Development: *	Openwood Phase II
Phase:	Openwood Phase II
Accounting reference:	
Our reference: *	HaroldG
Developer: *	Danielle Company Developer 👻 📑
Milestone process:	Development
Our branch: *	Cape Town
Date received:	2019/06/06
Estimated registration date:	2019/10/13
Language:	English
Property type:	Sectional
Open register in Deeds Office?	
Deeds registry:	Cape Town DO tracking number: DOTS

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

Section number:	101 👻	
Flat number:	101	
Extent:	80	
Tenant name:		
Tenant address:	Flat 101 Openwood Phase II	
Conditions:	Add/Remove	
	Condition	
DO tracking number:		DO



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

Number of Erven to add:	0 🗳 Starting at:	1 🗘 Add		
if No	Extent		Units	DO Tracking Number
	11	S	quare metres	070012345678
6	200	S	quare metres	070012345678
Number of Sections to add:	0 Starting at:	1 Add	Tenart Name	DO Tracking Number
ection No	Hat No			DO Tracking Number 070012345678
	2	100	Angie Brad	070012345699
New Delete 1 Move up				
New Delete 1 Move up 4 Mov	0 🔀 Starting at:	1 💌 Add		
	0 🐥 Starting at:	1 💌 Add Related Section	Description	DO Tracking Numb
New Delete Move up Work	0 Starting at:		Description Garage Garden	DO Tracking Num 070012345678 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:

🏛 Add Additional Form	
Additional Form:	
DOTS Number:	Application ito Section 4(1)(b) Regulation 68(1) Regulation 68(8)
DeedTracker Status:	
Notes:	
	OK Cancel

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.

(Bond No: 123/2009)			
<u>N</u> ew <u>D</u> elete			
Bond Details Bond holder	ABSA BANK - NEWLANDS	Bond number:	122/2009
Registered bond amount:	100000.00	Additional sum:	50000.00
Passed by:			∠ C
D0 tracking number:	DOTS		
DeedTracker Status:			

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.



•	Lodgement Batch + Archive	
	Create Lodgement Batch	1
	Add to Lodgement Batch	
fe _	View / Update Lodgement Batch	

🇰 Create Lodgement Batch			_ 🗆 ×
Batch Summary	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: * 5316857	58000100010004		
Matter subtype: *			
Parties: * JOINT V	AN DER MERWE MR EA & FERREIRA MISS ME	/ ABSA	
D0 tracking no:			
			Create Lodgement Batch Cancel
			.:

The Lodgement Batch View consists of the following elements:

Batch Summary:

ł	Batch Summary —	
ł	Batch reference: 317623752400100010004	No. of items in batch: 4
l	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:	rence: Smith and Strauss 191002		No. of items in batch: 1	
Number of matters to add:	dd: All matters with same batch		h reference and file reference will be identified as a batch in DeedTracker	

• No. of items in batch:



- \circ $\;$ 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
 - o Bond
 - o Consent
 - o Other
 - Transfer
- Other matter type
 - \circ $\;$ Only available when Matter subtype of 'Other' is selected.



	Application and Consent ito Section 40(5)(a)	^
	Application for Endorsement ito Recordal Section 20 of the Alienation of Land Act	
	Application for Endorsement ito Section 16 of 1947	
	Application for Endorsement ito Section 45 (2)	
	Application for Endorsement ito Section 45(1)	
	Application for Endorsement ito Section 45(bis)	
	Application for Endorsement ito Section 57	
20223	Application to Open STR	
20223	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 Attomey	
File Reference: *	Newly added fee	
	Notarial Deed of Cession	1
Matter Subtype: *	Notarial Deed of Habitatio	
	Alstanded Daniel of Canadanda	
Other Matter Type: *		-

- 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	DO Tracking No
17623752400100010004	Bond	JOINT VAN DER MERWE MR EA & FERREI	
12277722800100010004	Transfer	JOINT VAN DER MERWE MR EA & FERREI	
40804651600100010004	Consent	JOINT VAN DER MERWE MR EA & FERREI	
36327845200100010004	Other - Section 4(1)(b) application	JOINT VAN DER MERWE MR EA & FERREI	
	4(1)(b) application /AN DER MERWE MR EA & FERREIRA MISS ME	: / ABSA	•
			Create Lodgement Batch Cancel
odgement Batch creat	ed	×	
317623752400:	atter(s) created for batch 100010004. These matters can t ence matter list view.	be accessed from	
		ОК	

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.

🔟 Update Lodgement Batch				_ 🗆 🗙
- Batch Summary				
Batch reference	: 317623752400100010004	No. of items in batch: 4		
Number of matters to add	t: 0 🔺 Add	Deeds Office: Cape Town	•	
Remove				
ile Reference	Matter Subtype	Parties	DO Tracking No	
36327845200100010004	Other - Section 4(1)(b) application	JOINT VAN DER MERWE MR EA & FERREI	800123456778	
40804651600100010004	Consent	JOINT VAN DER MERWE MR EA & FERREI		
12277722800100010004	Transfer	JOINT VAN DER MERWE MR EA & FERREI		
7623752400100010004	Bond	JOINT VAN DER MERWE MR EA & FERREI		
File reference: * 23632	27845200100010004			
Matter subtype: * Other				•
Other matter type: * Section	n 4(1)(b) application			•
Parties: * JOINT	VAN DER MERWE MR EA & FERREIRA MISS ME	ABSA		
D0 tracking no: 80012	23456778			1
			Update Lodgement Batch	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	T	
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: * 2363278	345200100010004			
Matter subtype: * Other				•
Other matter type: * Section	4(1)(b) application			•
Parties: * JOINT V	AN DER MERWE MR EA & FERREIRA MISS ME /	ABSA		
D0 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.

Customise matter list: Corres	pondent Matters	- Customise
elect Columns		×
Excluded Columns:	Included Columns:	
Account Number Archive Reference Batch Cause of Action Contact Person Date Archived Development DOT Number Electronic Reference Expected Registration Date Last Action Date Last Movement Date Linked Listing Agency	 Property Hub alert Pending Messages Info State Type Sub Type File Reference Our Reference Parties Short Property Descriptio Instructed By Date Received Deeds Office Lodgement Batch Refere 	



Matter Search:

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

matter Search				×
Simple Advanced				
Search by: smith		Search	Include archived matters	
	Search Columns Accounting Bank Code Bank Code Bank Code Camediation TD Met File Reference Institution Institution Institution Property Description Reference SARS free Back Address Transfer State Address Lodgemet Bach Reference			

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 Corresponde	ent Matter Report 😳		
Refresh Customise S	Save As Export Preview +	Save Current Report Config	Save As Base Report
File Reference	▲ Short Party Description	Short Property Description	Instructing Attorney Name
filter text	7 filter text	l filter text	filter text
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.	Eff 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	2	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



umns Parameters Custom Layout			
xcluded Columns:		Included Columns:	
Date Documents Received From Lodgemen Date Expected Registration Date Date Hand In For Registration Date Instructions To Lodge Date Instructions To Register Date Lodged Date Pro Forma Sent Date Registered Debt Type ID Deeds Office Tracking Number Financial Institution Name Institution Branch Name Institution Branch Name Institution Branch Name Institution Branch Name Institution Branch Name Institution Altorney Address Instructing Attorney Famil Address Instructing Attorney Famil Address Instructing Attorney Famil Instructing Attorney Famil Instructing Attorney Tariff Instructing File Reference Lodging Agent Fee Blank Coli			Group
Hide on Printout?	Column N	ame:	
		OK	Cancel
		UK	Cancel

File Reference	•	Short Party Description	Short Property Descri	Instructing Attorney N	Lodgement Batc
filter text	7	filter text 🌱	filter text 🛛 🍸	filter text 🛛 🍸	st 7
20090424144420223		MRS. I S DAVIDSON / First	UNIT 1 GREENFIELDS	Korbitec Inc.	Smith and Strauss 19
20090424144420223		MRS. I S DAVIDSON / First		Goldberg Jackson Kottler an	Smith and Strauss 19
20090424144420223		MRS. I S DAVIDSON / First		Goldberg Jackson Kottler an	Smith and Strauss 19
20090424144420223		MRS. I S DAVIDSON / First		Goldberg Jackson Kottler an	Smith and Strauss 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.

Lodgement Batch	•	Archive	Delet
Create Lodgem	ent	Batch	Ĩ
Add to Lodger	nent	Batch	
View / Update l	odg	jement Batc	h
	nstru	cle Dale	neceived

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



Search by: smith					Search		Include archived	matters	
Lodgement Batch Reference		•	File Reference	0	ur Reference		Parties		Short Property Description
	T			7 fil		Y		7	
Smith and Strauss 191002		Ó	20090424144420223	Jill	G		MRS. I S DAVIDSON / First N	lational Bank	UNIT 1 GREENFIELDS
Smith and Strauss 191002		•	20090424144420223	Ha	roldG		MRS. I S DAVIDSON / First N	lational Bank	
Smith and Strauss 191002		•	20090424144420223	Ha	aroldG		MRS. I S DAVIDSON / First N	lational Bank	
Smith and Strauss 191002		•	20090424144420223	Ha	roldG		MRS. I S DAVIDSON / First N	lational Bank	
- Dutch	2.111		and Strauss 19100						
				[Yes		No		
			natter will be	ad	ded to th	ie ex	sting Lodgeme	nt Batch	
The Correspond	den	tr				IC CA		nit Dutten.	
•	den	tr	Matter Subtype		Pa	inties	Stille Lougerile	DOTS Number	
File Reference	den	tr				arties	IDSON / First National Bank		
The Correspond File Reference 0090424144420223 0090424144420223	der	tr	Matter Subtype		MF	arties NS. ISDAN			_
File Reference 0090424144420223	der	tr	Matter Subtype Other - Form W		MF	arties RS. IS DAV RS. IS DAV	1DSON / First National Bank		_
ile Reference 0090424144420223 0090424144420223	der	tr	Matter Subtype Other - Form W Transfer		MF	arties RS. IS DAV RS. IS DAV RS. IS DAV	IDSON / First National Bank IDSON / First National Bank		

20190920094853934	Other - Notanal 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.

Batch reference	317623752400100010004	No. of items in batch: 5	
Number of matters to add	Add	Deeds Office: Cape Town	•
Remove			
ïle Reference	Matter Subtype	Parties	DO Tracking No
31685758000100010004	Bond	JOINT VAN DER MERWE MR EA & FERR	
36327845200100010004	Other - Section 4(1)(b) application	JOINT VAN DER MERWE MR EA & FERR	
40804651600100010004	Consent	JOINT VAN DER MERWE MR EA & FERR	
12277722800100010004	Transfer	JOINT VAN DER MERWE MR EA & FERR	
17623752400100010004	Bond	JOINT VAN DER MERWE MR EA & FERR	
File reference: * 53168 Matter subtype: * Bond	5758000100010004		
Dona			
Parties: ^ JOINT	VAN DER MERWE MR EA & FERREIRA MIS	S ME / ABSA	
D0 tracking no:			
			Update Lodgement Batch Car



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.

	Consent - acb00520 - - Release of property (Accepted)													
Save	Print	Email	SMS	Electronic Messages	Anytime Milestones	-	Send/Receive	•	Lexis WinDeed	•	Lexis Tracker	Ŧ	Accounting 👻	Import bond to consent

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

Import or link matters		×
Select option: *	Import data into this matter	•
	Import data and link to matter Import data into this matter	
	Link to matter without importing data	

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

Singhe Advanced Search by: mith Search Columns Accounting Bank Code Bond Cancellation Number Development Tile Reference Instructed By Dardy Description Reference SARS Ref Transfer Street Address	📶 Matter Search				×
Search Columns Accounting Bank Code Bond Cancellation Number Cancellation TO Ref Development File Reference Instructed By Loan Account Number Party Description Reference SARS Ref Transfer Street Address	Simple Advanced				
Accounting Bank Code Bond Cancellation Number Cancellation TOH File Reference Institution Instructed By Loan Account Number Party Description Reference SARS Ref Transfer Street Address	Search by: smith	Search Columns	Search	Include archived matters	
OK Cancel		Accounting Bank Code Bond Cancellation Number Cancellation TD Ref Development File Reference Instructed By Loan Account Number Party Description Property Description Reference SARS Ref			
				ок С	ancel

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:

Tra	nsfer - Ashby / COlt - Ti	ransfer (Documents signed)			
Sav	e Print Email	SMS	Anytime Milestones - Send/Receive	Lexis WinDeed	 Rates Clearance 	Lexis Track
3	Milestone Summary	Milesto				
Т	Transfer Details 🛛 🖈	 ✓ 	Purchaser Contacted			Action
4 Tra	respondence nsferors (1) Conden Albebra	 ✓ 	Status Documents Received			Action
Tra	Gordon Ahsby nsferor Descriptions nsferees (1)	 ✓ 	Title Deed Requested 08 Oct 19 07 Oct 19			Action
	Colby nsferee Descriptions	 ✓ 	Title Deed Received 16 Oct 19 07 Oct 19			Action
-	ning Details perties (1)	 ✓ 	Rates Figures Requested 07 Oct 19			Action
	ERF 100 LORRAINE perty Descriptions	 ✓ 	Rates Figures Received 07 Oct 19			Action
	Financial	 ✓ 	HOA Levy Figures Requested 07 Oct 19			Action
9	SARS	 ✓ 	HOA Levy Figures Received 07 Oct 19			Action
	Additional Documents	 ✓ 	Initial Letter Sent 08 Oct 19 07 Oct 19			Action
R	Pro Forma Account Messages	 ✓ 	Cancellation Figures Requested 08 Oct 19 07 Oct 19			Action
_	-	Sal	es Conditions			\frown
_ /	Matter Comments Attached Documents	×	Suspensive Conditions Fulfilled 07 Oct 19			Action
U	Matter History	 ✓ 	Deposit Received 07 Oct 19			Action
		 ✓ 	Bond Granted 07 Oct 19			Action
		 ✓ 	Balance of Purchase Price Received 07 Oct 19			Action
		Do	cuments and Costs			\frown
		 ✓ 	Documents Drawn 16 Oct 19 07 Oct 19			Action
		 ✓ 	Draft Deed Sent 18 Oct 19 07 Oct 19			Action
		 ✓ 	Seller Signed Documents 22 Oct 19 07 Oct 19			Action
		 ✓ 	Purchaser Signed Documents 22 Oct 19 07 Oct 19			Action
			Pro forma Costs Received 29 Oct 19			Action



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.

nbox (284)													
Reply	Accept	Re-process	Lexis Tracker	Delete	Print	Export							
State	Туре	То					From		Subject				
	filter text			Y		7	esta						
State	: Inbox (2	? items)											
¥	<u> </u>	[Unassigned]					Transfer Instructions		Estate Agent Transfer: Initial instruction				
¥	W	[Unassigned]					Transfer Instructions		Estate Agent Transfer: Initial instruction				

m 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						
Create and Open Create Connect to matter Cancel						

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

	Connect to Existing Matter	×
	A New milestone process applied to this matter. Some milestones may be lost.	
	File reference: * ETI Connect	
	Our reference: * JillG 🗸	
1	Branch: Justin Thomas Attorneys	
	Milestone Process: * Estate Agent Transfer (ETI) 🗸	
	Connect and Open Connect Cancel	

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



Tra	nsfer - Ashby / COlt - Ti	ransfer (Documents signed)	
Save	Print Email	SMS Anytime Milestones - Send/Receive - Lexis WinDeed - Rates Clearance -	Lexis Track
3	Milestone Summary	Milestone Summary	
т	Transfer Details ≫	0, 0(1)	
38	Financial	Summary	(
38		Attorney Classification	Action
9	SARS	Free Format from Attorney	Action
Ĩ	Additional Documents	Document to Share	
R	Pro Forma Account		Action
	Messages	Preliminaries	\frown
Ð	Matter Comments	Confirmation of Receipt 07 Oct 19 07 Oct 19	Action
Ū	Attached Documents	Estimated Registration Date 07 Oct 19	Action
G	Matter History	Seller Contacted 07 Oct 19 07 Oct 19	Action
		Purchaser Contacted 07 Oct 19 07 Oct 19	Action
		Rates Figures Received 07 Oct 19	Action
		Sales Conditions	\frown
		 Suspensive Conditions Fulfilled 07 Oct 19 	Action
		V Deposit Received 07 Oct 19	Action
		V Bond Granted 07 Oct 19	Action
		Pre-Lodgement	\frown
		Seller Signed Documents 22 Oct 19 07 Oct 19	Action
		✓ Purchaser Signed Documents 22 Oct 19 07 Oct 19	Action



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	Include inactive items?						
Attorney Name			Address				
M			🝸 filter text				
BJ VAN DER WALT & S	SCHOEMAN		B J VAN DER WALT	& SCHOEMAN, P O Box 112, PF	RETORIA, 00	001	
CK Friedlander Shandlin	ig Volks		CK Friedlander Shand	ling Volks, 8th Floor Greenmarket	t Place, 54 S	hortmarket Street, Cap	e Town,
Gavin Gower & Co			Gavin Gower & Comp	any, Docex 16, Port Shepstone			
Goldbauers, Bellville			Goldbauers, DOCEX	23, Bellville			
Koos van Jaarsveld			lewers				
Estate Agencies New Delete	Include inactive items?						
	 Include inactive items? Email address 	VAT Number	Fax Number	Address (English)		Address (Afrikaans)	
New Delete Estate Agency		VAT Number	Fax Number	Address (English)	Y	Address (Afrikaans) filter text	
New Delete Estate Agency P	Email address				Ą		
New Delete Estate Agency P PRIVATE SALE	Email address filter text			Y litter text	_		
New Delete Estate Agency PI _PRIVATE SALE Costa Plenty Estates Ple	Email address idter text noreply@lexisnexis.co.za			Y litter text	_	filter text	
New Delete Estate Agency P _P _PRIVATE SALE Costa Plenty Estates Ple Garryn Peters LTD	Email address Email address Inter text no-reply@lexisnexis.co.za ettenbu no-reply@lexisnexis.co.za			Y litter text	_	filter text	
New Delete Estate Agency P P P P P P P P P P P P P P P P P P P	Email address Email address Inter text no-reply@lexisnexis.co.za ettenbu no-reply@lexisnexis.co.za no-reply@lexisnexis.co.za	Tiller text		filter text Name and address -	_	filter text	
New Delete Estate Agency PPRIVATE SALECosta Plenty Estates Ple Gamyn Peters LTD Leap Frog Pam Golding	Email address Email address inter text no reply@lexisnexis.co.za no reply@lexisnexis.co.za no reply@lexisnexis.co.za no reply@lexisnexis.co.za	Tiller text	7 filtertext	Iter text Name and address - 240 Main Road	Costa Ple	filter text	Costa Ple.
New Delete Estate Agency PI _PRIVATE SALE Costa Plenty Estates Ple Ganyn Peters LTD Leap Frog Pam Golding	Email address Email address inter text no reply@lexisnexis.co.za no reply@lexisnexis.co.za no reply@lexisnexis.co.za no reply@lexisnexis.co.za no reply@lexisnexis.co.za no reply@lexisnexis.co.za	Tiller text	7 filtertext	Name and address - 240 Main Road Pears Estates 78 Oak	Costa Ple k AveWY	<i>filter text</i> Name and address - (240 Main Road	1 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.



Each User Category can now be configured as required.



User Categories	
The Move up Hove down	
Categories	
filter text	7
UserCategory1	
UserCategory2	
UserCategory3	
Category Details	
Category Name: UserCategory1	

Selecting the specific User Category to complete the necessary values.

Firm Settings	*	UserCategory 1
 Our Branches (4) Betty 		New Delete A Move up A Move down Include inactive items?
Cape Town		Category value
Danielle Hartnick		filter text
Parow ▷ Trust Accounts (10)		UserCategory1Value1
Users	¥	UserCategory1Value2
03013		UserCategory1Value3
My Settings	¥	
Common	¥	
Bonds	×	
Transfers	¥	
Consents	*	
Account Items Financial Services Providers Firm Signatories (11) Print List	(2)	
Templates		Category Details
▲ User Categories (3)		Category Value: UserCategory1Value1
UserCategory1		
UserCategory2		
UserCategory3		

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



irm Settings	*	Project Phase	e		
Our Branches (4) Betty		New Del	ete 💧 懀 Mov	re up 🔰 📕 Move dowr	Include ina
Cape Town		Category value			
Danielle Hartnick Parow		filter text			
Trust Accounts (10)		Phase 1			
ers	¥	Phase 2			
		Phase 3			
y Settings	¥				
Common	¥				
Bonds	¥				
Jonus	Ť				
ransfers	¥				
onsents	*				
Account Items Financial Services Providers (Firm Signatories (11) Print List	2)				
Templates		Category Details	s		
 User Categories (3) Project Phase 			Category Value:	Phase 3	
UserCategory2 UserCategory3					

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.	Titter 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:		-
	UserCategory 2:	Phase 1	
	UserCategory2:	Phase 2	
	UserCategory3:	Phase 3	
		·	



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

Customising "Lodged Report"		×
Columns Parameters Custom Layout		
Excluded Columns:	Included Columns:	
(User Category) UserCategory2 (User Category) UserCategory3 [RowNumber] Accepted Amend Figures Requested Bond Attorney Name Cancellation Branch Consenter Correspondence Reference Current Status Custom Date 1 Custom Date 1 Custom Date 10 Custom Date 10 Custom Date 11 Custom Date 12 Custom Date 13 Custom Date 13 Custom Date 15 Custom Date 15 Custom Date 16 Custom Date 17 Custom Date 18 Custom Date 19 Custom Date 2 Blank Column		
Hide on Printout?	Column Name:	
	OK Cano	el



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.

View	Trans	ers	•	Filter matter	list	×	C	Export					
eP	0 0	File Reference		Our Referen	ce Parties		Short Pro	operty Descrip	ion 🔺	Date	Received	Deeds	Office
			7	filter text	🝸 filter text	7			Y		text 🍸		t.
8 1	wo Wee	eks Ago (2 items)											
		20190419 Sunnyva	ale	HaroldG			ERF 1 RI	USTDAL		2019	/09/25	CPT	
	0 🖪	20191010		HaroldG	MJ Smith to W Castle		ERF 2 W	ORCESTER		2019	/09/25	CPT	
ΞL	ast Mon	th (1 item)											
ζ													
								Matter	Summary				
Matter	summary	Contact informatio	n Mat	ter history									
Date			User		Description								
2019/1	0/13 3:21	:04 PM	Super	visor	Matter Comments: Knowing v	vhere to lo	ok and wh	nat to watch ou	t for				
2019/1	0/03 9:12	2:31 AM	Super	visor	Milestone [Balance of Purcha	ase Price F	Received]	actioned on 2)19/10/03	ſ	Description		
2019/1	0/03 9:12	2:05 AM	Super	visor	Milestone [Bond Granted] act	tioned on 2	2019/10/0	13			Knowing where to loc		
2019/1	0/03 9:11	:57 AM	Super	visor	Milestone [Deposit Received] actioned	on 2019/1	10/03- Activity	[Email when	n Dep	what to watch out for the battle. Download	this	when Deposit is Received] cancele
2019/0	9/25 11:5	54:38 AM	Super	visor	New draft request created or	Rates Cle	earance for	r each propert	on this mat	ter	report to understand to pervasive types of en		
2019/0	9/25 11:4	12:04 AM	Super	visor	Lexis Tracker: [Connect to C	hat]					threats, how security professionals perceiv	e them	
2019/0	9/25 11:4	12:02 AM	Super	visor	Deeds Office search perform	ed					and what they're doin combat them. Most		
2019/0	9/25 11:4	12:02 AM	Super	visor	Milestone [Date Received] a	ctioned on	2019/09/	/25			importantly, you'll wal		
	9/25 11:4	2:02 AM	Super	visor	Matter state changed to Acc	epted on 2	2019/09/2	5			with actionable steps improve your organis	ation's	
2019/0											email security and cy		

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.

Excluded Columns: [User Category] Township [User Category] UserCategory2 [RowNumber] Acknowledge Cancel to Reassign Acknowledge Reinstate Acknowledge Withdraw Acknowledge Withdraw Action by Additional Data Sent Amendment Acknowledged Amendment Rejected Audit Approved Authority to Pay Sent Bank Reference Bond Active Bond Classification Bond Classification (Full) Bond Costs Sent Blar	Included Columns: Bond Code Sott Name Loan Account Number Shott Property Description Institution Code Date Received Date Lodged Date Registered Remarks Working Days Since Receipt Working Days Since Receipt	t
Hide on Printout?	Column Name:	



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	Deeds Office Master Reference Listing Agency
Revert to Default	Set as Default OK Cancel

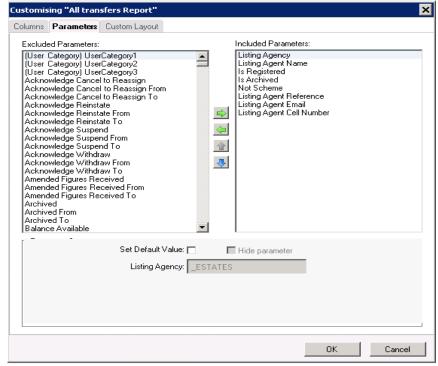


Transfer Reports:

Customising "All transfers Report"	×
Columns Parameters Custom Layout	
	Included Columns: Reference No Our Reference Parties Property Received Seller Signed Documents Purchaser Signed Documents Transfer Duty Receipt Received Rates Certificate Received Levy Certificate Received Susp. Conditions Received Susp. Conditions Received Deposit Received Costs Paid Listing Agency
Hide on Printout?	Column Name:
	OK Cancel

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.

m PrintList - du Toit MR Frikkie [ABP: abs	P-amendment1]	-	
Print	Attach to matter 🕴 Send 👻 Email 🌉 Wh	at's New?	
Electronic instruction documents	Description	*	Saved
Documents for signature	filter text	7	filter text
FICA Checklists Lodgement documents	Instruction to Attorney		
On Prep documents			
Loan Agreements and Annexures			
On registration documents Additional Forms			
Documents on release of bond by deeds offi			
Ancillary Documents and Forms Correspondent Documents			
Additional Print List			
	<		>
		1 of 1 docum	nents selected. 💥



ABSA Private Bank – Consents

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

PrintList - acb02120 -		×
Print 🔹 Preview 💌 Save 💌 Attach to matter 🛛 Send 💌 Email		
Consent Documents Description		Saved
filter text T	filter text	
Consents letter to acknowledge receipt of instruction		
Mercantile Instruction to attorney		
Letter to mortgagor		
Proforma invoice letter		
Refund information sheet		
Request for guarantee letter		
Cripting example		
APB Instruction to Attorney		
<		>
1 of 8 docu	iments sele	ected:

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



m PrintList - du Toit MR Frikkie [ACP: G-absaspf_str3]				×
Print 🔹 Preview 🔹 Save 🔹	Attach to matter 🔰 Send 👻 Email 💮 What's New?			
Electronic instruction documents	Description			Sav ^
Documents for signature	filter text	T	filter text	
FICA Checklists	Statement of Account			
On Prep documents	Conveyancer's Certificate of Compliance			
Loan Agreements and Annexures	Drawdown Request			
On registration documents Additional Forms	a Authorities to Pay (Loans Debit Authority)			
Documents on release of bond by deeds offi	🗐 FICA Affidavit - Frikkie du Toit			
Ancillary Documents and Forms Correspondent Documents Additional Print List	Marital Status Declaration - Frikkie du Toit			
	3 Standard Mortgage Conditions			
	3 Specimen Signatures: Frikkie du Toit			
	Lodgement Cover			
	Borrowing Resolution by Close Corporation			
	Borrowing Resolution by Company(1)			
	Cross Suretyship			
	Borrowing Resolution by Trust			
	3 Security Cession Agreement			
				×
	<	10.1		>
	1 of	19 docur	ments sele	cted.

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):	L		
Amount of Insurance:			
Collateral Security Required?			
Total Tariff Fee:	17320.0	.00 (Firm's Tariff Fee + Lodging agent's fee.)	
Firm's Tariff Fee:	17320.0	.00	
Fee reduction amount:	0.0	.00 BEE discount required	
Lodging Agent's Fee:	0.0		
Lodging Agent's Posts and Petties:			
Assessment Fee:			
Initiation Fee:	834234.3	34	
Loss of Rent (12 Months - min 20% of sum insured):		•	
Bank Accounts:	New Edit Delete	e	
	Account Number	Acccount Type Bank Name Branch Name]
Insurance Policies:	New Edit Delete	e	
	Description	Insurance Registration Number Name Policy Number	1
Investments:	New Cate		
in counter and	New Edit Delete		1
	Investment Number	Institution Name Type	
		22	



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

