

# Lexis Convey v17.2.17

## Release Notes

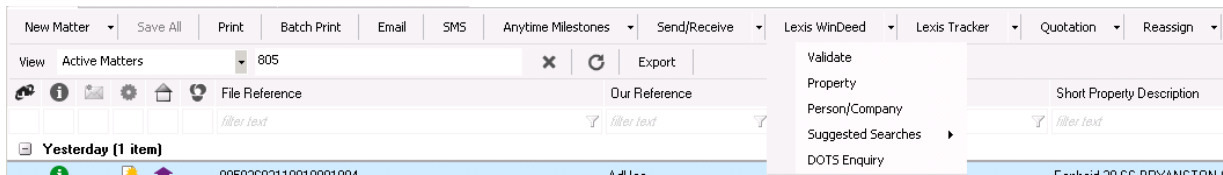
2020/12/01

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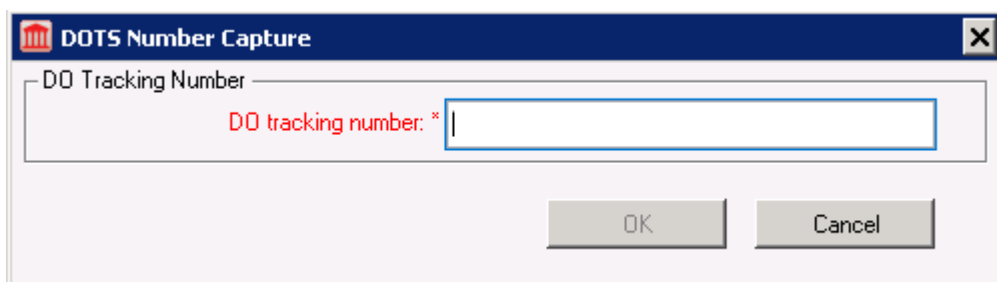
## Matter List Improvements: Lexis WinDeed

The Lexis WinDeed button is now also available on the Matter List for your convenience.



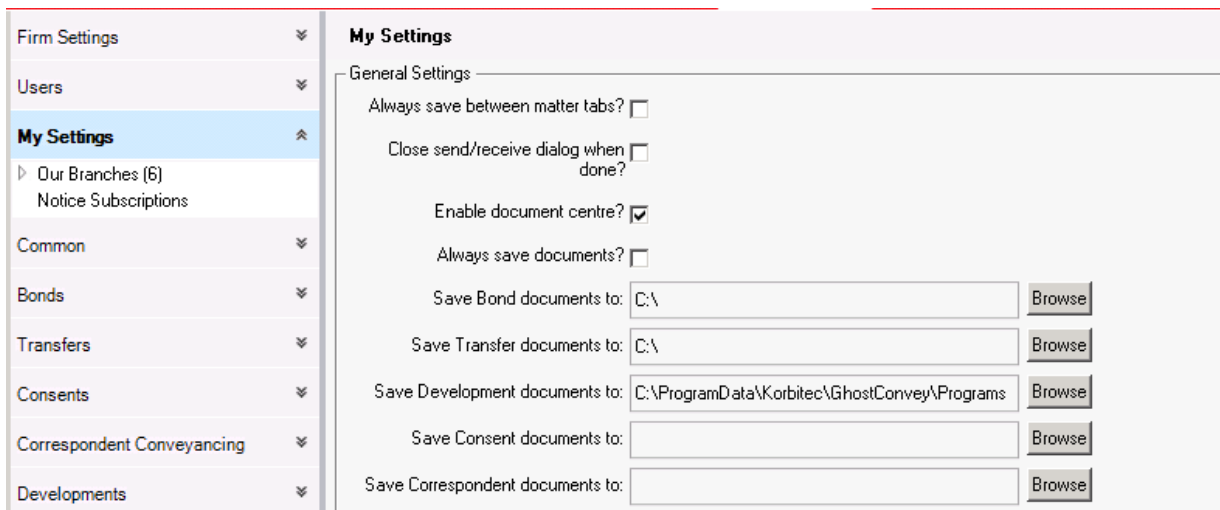
A new **DOTS Enquiry** Search option has been added to the Lexis WinDeed button.

When selecting the **DOTS Enquiry** Search option, the system will prompt you to capture a DO tracking number if none was captured for the matter.



## Setup: My Settings – Save Documents To

You can now specify the folder where Consent and Correspondent Matter documents should be saved to under Setup > My Settings > General Settings.



## New Accounting Reference fill point

The Accounting Reference is now available as a fill point for all matter types.

Bonds: %[Bond.AccountingReference]

Transfers: %[Transfer.AccountingReference]

Consents: %[Consent.AccountingReference] for GhostFill or [Accounting Reference of Consent] GhostDraft.

## Lexis Tracker: Secure Chat

Green ticks now indicate when a Secure Chat message was delivered and read by the consumer or customer.



# New Bond Institutions

## Grindrod Bank Limited

Activate Grindrod Bank Limited under Setup > Bonds > Institutions.

<b>Firm Settings</b>	<b>Grindrod Bank Limited</b>
<b>Users</b>	Institution Details
<b>My Settings</b>	Is this institution active? <input type="checkbox"/>
▷ Our Branches (6)	Name: Grindrod Bank Limited
Notice Subscriptions	Group code: * GRD
<b>Common</b>	Must guarantees be numbered? <input type="checkbox"/>
<b>Bonds</b>	Next guarantee number: <input type="text"/>
▷ ABSA Commercial Property	Prefix to guarantee number: <input type="text"/>
▷ ABSA Private Bank (1)	Suffix to guarantee number: <input type="text"/>
▷ Afgri Operations Ltd (2)	Status affidavit with sureties? <input type="checkbox"/>
▷ Albaraka Bank Limited (1)	Number of copies of guarantees: <input type="text"/>
▷ Beech Finance Limited (1)	Default our ref: *
▷ Bidvest Bank Limited (1)	Postage and petties amount: <input type="text"/>
▷ Blue Strata Trading (Pty) Lim	Deeds search fee amount: <input type="text"/>
▷ BoE Private Bank (1)	FICA fee payable for first bonds? <input type="checkbox"/>
▷ Business Partners Limited (1)	FICA fee payable for further bonds? <input type="checkbox"/>
▷ Cullinan Holdings Limited (1)	FICA fee for individuals: <input type="text"/>
▷ Eskom Finance Company St	FICA fee for juristic parties: <input type="text"/>
▷ FirstRand Bank Limited (8)	Firm trust account exists? <input type="checkbox"/>
▷ FNB Comm (LCS) (1)	
▷ FNB Commercial Property Fi	
▷ FNB Private Clients (Lotus N	
▷ <b>Grindrod Bank Limited (1)</b>	
▷ Habib Overseas Bank Limite	
▷ HBZ Bank Limited (1)	
▷ HHP Housing Investment Partner	
▷ IDC of SA Ltd (1)	
<b>Transfers</b>	

## Bidvest Bank Limited

Activate Bidvest Bank Limited under Setup > Bonds > Institutions.

<b>Firm Settings</b>	<b>Bidvest Bank Limited</b>
<b>Users</b>	Institution Details
<b>My Settings</b>	Is this institution active? <input type="checkbox"/>
▷ Our Branches (6)	Name: Bidvest Bank Limited
Notice Subscriptions	Group code: * BDV
<b>Common</b>	Must guarantees be numbered? <input type="checkbox"/>
<b>Bonds</b>	Next guarantee number: <input type="text"/>
▷ ABSA Commercial Property	Prefix to guarantee number: <input type="text"/>
▷ ABSA Private Bank (1)	Suffix to guarantee number: <input type="text"/>
▷ Afgri Operations Ltd (2)	Status affidavit with sureties? <input type="checkbox"/>
▷ Albaraka Bank Limited (1)	Number of copies of guarantees: <input type="text"/>
▷ Beech Finance Limited (1)	Default our ref: *
▷ <b>Bidvest Bank Limited (1)</b>	Postage and petties amount: <input type="text"/>
▷ Blue Strata Trading (Pty) Lim	Deeds search fee amount: <input type="text"/>
▷ BoE Private Bank (1)	FICA fee payable for first bonds? <input type="checkbox"/>
▷ Business Partners Limited (1)	FICA fee payable for further bonds? <input type="checkbox"/>
▷ Cullinan Holdings Limited (1)	FICA fee for individuals: <input type="text"/>
▷ Eskom Finance Company St	FICA fee for juristic parties: <input type="text"/>
▷ FirstRand Bank Limited (8)	Firm trust account exists? <input type="checkbox"/>
▷ FNB Comm (LCS) (1)	
▷ FNB Commercial Property Fi	
▷ FNB Private Clients (Lotus N	
▷ Grindrod Bank Limited (1)	
▷ Habib Overseas Bank Limite	
▷ HBZ Bank Limited (1)	
▷ HHP Housing Investment Partner	
▷ IDC of SA Ltd (1)	
<b>Transfers</b>	

# Senwes Limited

Activate Senwes Bank Limited under Setup > Bonds > Institutions.

**Senwes Limited**

Institution Details

Is this institution active?

Name: Senwes Limited

Group code: \* SWS

Must guarantees be numbered?

Next guarantee number: [dropdown]

Prefix to guarantee number: [text]

Suffix to guarantee number: [text]

Status affidavit with sureties?

Number of copies of guarantees: [dropdown]

Default our ref: \* DawnM

Postage and petties amount: [text]

Deeds search fee amount: [text]

FICA fee payable for first bonds?

FICA fee payable for further bonds?

FICA fee for individuals: [text]

FICA fee for juristic parties: [text]

Firm trust account exists?

## FNB Complex Lending Bonds

The new FNB Complex Lending Bond division and new its document suite is now available in Lexis Convey.

You are now able to Send/Receive for FNB Complex Lending Bonds.

- FNB Commercial Property Finance - Cancellation Request ▶
- FNB Commercial Property Finance - Consent ▶
- FNB Complex Lending - Bond ▶
- FNB Housing Finance Commercial Property Finance - Bond ▶
- FNB Private Client - Bond ▶
- FNB Private Wealth - Bond ▶

Open FNB Complex Lending matters.

Matter List **AG1-RMB Code**

**Bond - MR I ESSOP MRS A KADIR / FNB Complex Lending - New (Security document received)**

Save Print Email SMS Electronic Messages Anytime Milestones Send/Receive Lexis WinDeed Lexis Tracker

**Milestone Summary**

**FNB** Milestones

✓ **Instruction Received** 03 Sep 20 **Days since instruction: 58**

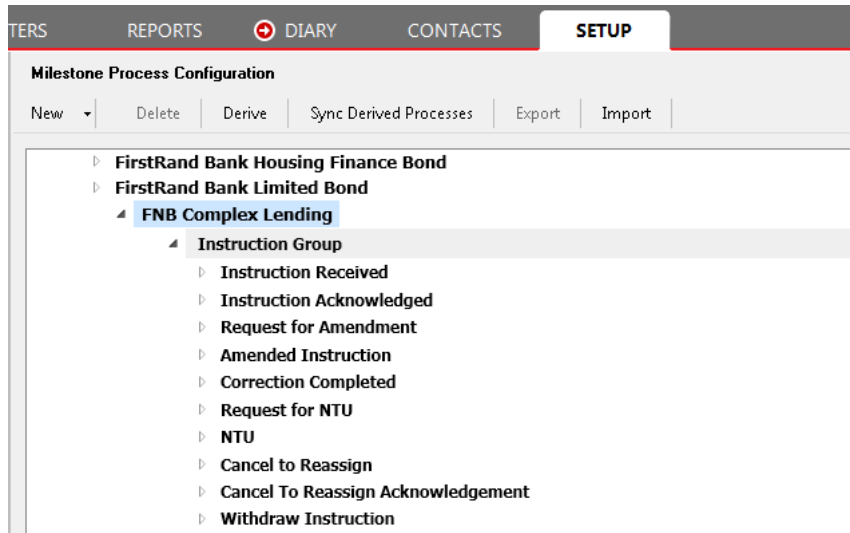
✓ **Instruction Acknowledged** 03 Sep 20 **Estimated Registration Date** 02 Oct 20

Summary [dropdown]

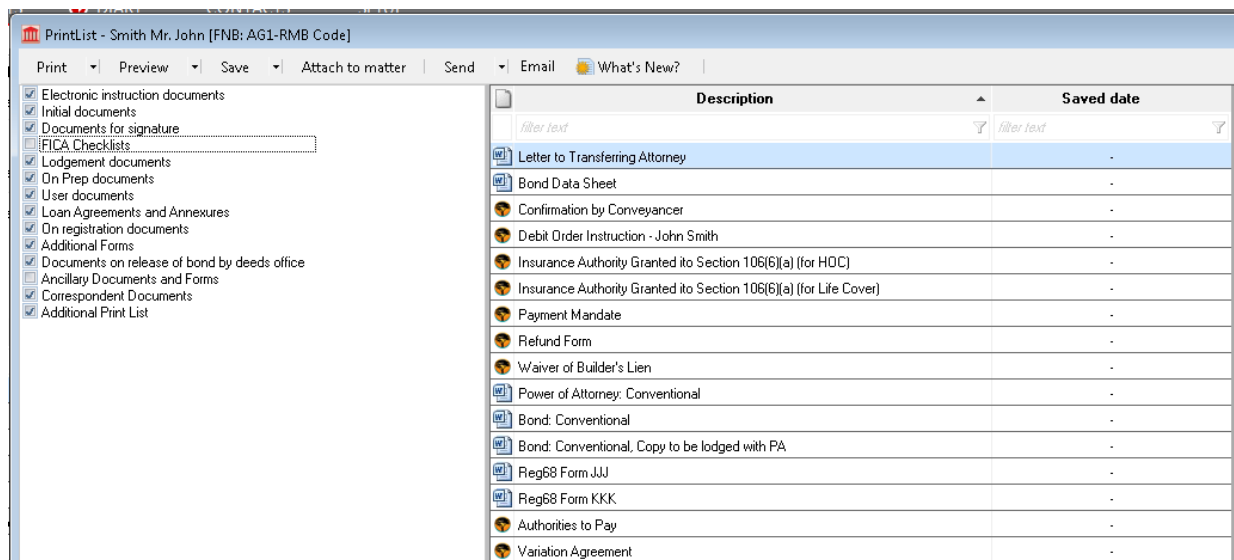
Pre-Lodgement [dropdown]

Deeds Office [dropdown]

Customise the FNB Complex Lending Bonds Milestone Configuration.



Print FNB Complex Lending Bond documents:



## Document Maintenance

Please refer to **What's new** on the Print List.

The following document suites have been updated:

- Bond Reg68 Form JJJ.rtf
- Consents Reg68 Form JJJ.rtf
- Bond Reg68 Form KKK.rtf
- LPCM Number changes
- Absa Private Bank - new Guarantee.gd\*
- Absa Private Bank - new Loans Debit Authority.gd\*
- Nedbank Limited - new DebiCheck Awareness Letter.gd\*
- Nedbank Limited - new Life Cover Waiver Form.gd
- FNB Complex Lending new document suite\*\*

\* Only available from the 3<sup>rd</sup> of December (TBC) next week. \*\* Only available to the pilot attorneys.

## Maintenance

### Description

WebConvey – Updated the unique matter identifier to use the Account Number + Grant Date + Instruction Type

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WebConvey – Institution Branding – Nedbank Private Wealth

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Lexis Tracker performance improvements

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GCDev-112215 – Milestone Process Configuration Improvements – Fixed Milestones displaying as due when no Due Date is set or cleared from the milestone configuration.

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CAT-112343 – Attached Documents Improvements - Added the time stamp to the Date Saved column for Attached Documents.

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GCDev-112316 – Fixed Error occurring when an email activity is actioned with an email address captured in the CC field

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