# 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.

New Matter	MS Anytime Milestones 👻 Send/Receive 👻 L	Lexis WinDeed 👻 Lexis Track	ker 🔹 Quotation 👻 Reassign 👻
View Active Matters - 805	× C Export	Validate	
🧬 🚯 🕍 🌣 🚖 😲 File Reference	Our Reference	Property Person/Company	Short Property Description
filter text	Tilles lext	Suggested Searches	🍸 filter text
Yesterday (1 item)		DOTS Enguiry -	
	A - 11	DOTOEnquiry	E-sheid 20 CC DEVANCTORU

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.

📶 DOTS Number Capture		×
D0 Tracking Number		
D0 tracking number: *		
	OK Cancel	

#### 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.

Firm Settings	×	My Settings
Users	×	General Settings
My Settings	*	Close send/receive dialog when
<ul> <li>Our Branches (6)</li> <li>Notice Subscriptions</li> </ul>		done? Enable document centre? 🔽
Common	×	Always save documents?
Bonds	¥	Save Bond documents to: C:\ Browse
Transfers	×	Save Transfer documents to: C:\ Browse
Consents	×	Save Development documents to: C:\ProgramData\Korbitec\GhostConvey\Programs Browse
Correspondent Conveyancing	¥	Save Consent documents to: Browse
Developments	×	Save Correspondent documents to: Browse



## 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.

	Petrus du Toit Transfer - Unit 21 SS High Cap Three, Situated at Vredehoek
	Hello Supervisor , 08-10-2020 🖋
<	Morning Petrus du Toit , 08-10-2020
	Enter message
	Go to matter Print Attach Send



# New Bond Institutions

#### Grindrod Bank Limited

Activate Grindrod Bank Limited under Setup > Bonds > Institutions.

Firm Settings ¥	Grindrod Bank Limited	
Users ¥	Institution Details	
	Is this institution active? 🗖	
My Settings *	Name: Grindrod Bank Limited	
Dur Branches (6) Notice Subscriptions	Group code: * GRD	
Common ¥	Must guarantees be numbered?	
Bonds *	Next guarantee number:	*
ABSA Commercial Property     ABSA Private Bank (1)	Prefix to guarantee number:	
Afgri Operations Ltd (2)	Suffix to guarantee number:	
<ul> <li>% Albaraka Bank Limited (1)</li> <li>m Beech Finance Limited (1)</li> </ul>	Status affidavit with sureties?	
<ul> <li>1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1</li></ul>	Number of copies of guarantees:	A V
Description of the second s	Default our ref: *	•
<ul> <li>Evaluation Control Control</li> <li>Cullinan Holdings Limited (1)</li> <li>Cullinan Holdings Limited (1)</li> </ul>	Postage and petities amount:	
<ul> <li>Statistics in transce company of</li> <li>FirstRand Bank Limited (8)</li> <li>Statistics (1)</li> </ul>	Deeds search fee amount:	
FNB Commercial Property Fi Sector Sector	FICA fee payable for first bonds?	
Grindrod Bank Limited (     Minimum Habib Overseas Bank Limite	FICA fee payable for further bonds?	
🕨 🏛 HBZ Bank Limited (1)	FICA fee for individuals:	
<ul> <li>HIP Housing Investment Partner</li> <li>IDC of SA Ltd (1)</li> </ul>	FICA fee for juristic parties:	
Transfers ¥	Firm trust account exists?	

#### Bidvest Bank Limited

Firm Settings	¥	Bidvest Bank Limited	
Users	×	Institution Details	
00010		Is this institution active?	
My Settings	*	Name:	Bidvest Bank Limited
Dur Branches (6)			
Notice Subscriptions		Group code: *	BDV
Common	≽	Must guarantees be numbered?	
Bonds	*	Next guarantee number:	×
<ul> <li>ABSA Commercial Propert</li> <li>ABSA Private Bank (1)</li> </ul>	y 📥	Prefix to guarantee number:	
Afgri Operations Ltd (2)		Suffix to guarantee number:	
<ul> <li>Non-Albaraka Bank Limited (1)</li> <li>1 Beech Finance Limited (1)</li> </ul>		Status affidavit with sureties?	
<ul> <li>Image: Bidvest Bank Limited</li> <li>Image: Blue Strata Trading (Pty) L</li> </ul>		Number of copies of guarantees:	A
<ul> <li>BoE Private Bank (1)</li> <li>m Business Partners Limited</li> </ul>		Default our ref: *	•
<ul> <li></li></ul>		Postage and petties amount:	
<ul> <li>FirstRand Bank Limited (8)</li> <li>FNB Comm (LCS) (1)</li> </ul>		Deeds search fee amount:	
FNB Commercial Property		FICA fee payable for first bonds?	
<ul> <li>Solution Field Clients (Lotus</li> <li>Image Grindrod Bank Limited (1)</li> <li>Image Grindrod Clients Clients</li> </ul>		FICA fee payable for further bonds?	
<ul> <li>Image: Barry Strategy Stra</li></ul>		FICA fee for individuals:	
<ul> <li>Fill Housing Investment Partn</li> <li>IDC of SA Ltd (1)</li> </ul>	er I	FICA fee for juristic parties:	
Transfers	×	Firm trust account exists?	

Activate Bidvest Bank Limited under Setup > Bonds > Institutions.



#### Senwes Limited

Firm Settings	×	Senwes Limited	
Users	¥	Institution Details	
		Is this institution active? 🔽	
My Settings	*	Name: Servives Limited	
<ul> <li>Our Branches (6)</li> <li>Notice Subscriptions</li> </ul>		Group code: * SWS	
Common	¥	Must guarantees be numbered? 🗖	
Bonds	*	Next guarantee number:	
<ul> <li>Image: HBZ Bank Limited (1)</li> <li>Image: Hip Housing Investment Partner</li> </ul>		Prefix to guarantee number:	
<ul> <li>IDC of SA Ltd (1)</li> <li>Investec Bank Limited (1)</li> </ul>		Suffix to guarantee number:	
🗁 🏄 Ithala Limited (1)		Status affidavit with sureties? 🗖	
<ul> <li>Mercantile Bank Limited (1)</li> <li>Metcash Trading Africa (Pt</li> </ul>	y I	Number of copies of guarantees:	
<ul> <li>Redbank Business Banking</li> <li>Redbank Limited (7)</li> </ul>	9	Default our ref: * DawnM	
<ul> <li>Redbank Property Finance</li> <li>Reoples Bank Limited (1)</li> </ul>	I	Postage and petties amount:	
<ul> <li>m Protea Diamonds (Pty) Limi</li> <li>M RMB Private Bank (Lotus N</li> </ul>		Deeds search fee amount:	
<ul> <li>Sanlam Home Loans (1)</li> <li>Senwes Limited (1)</li> </ul>		FICA fee payable for first bonds?	
Genwes Limited [1]     Genwes Limited [1]     Standard Bank Limited [1]     Genwes Standard Bank Property Fil		FICA fee payable for further □ bonds?	
🕨 💐 Standard Chartered Bank (	1	FICA fee for individuals:	
▷ m The Trustees For The Time ▷ m Transnet Limited (1)	-	FICA fee for juristic parties:	
Transfers	×	Firm trust account exists?	

#### Activate Senwes Bank Limited under Setup > Bonds > Institutions.

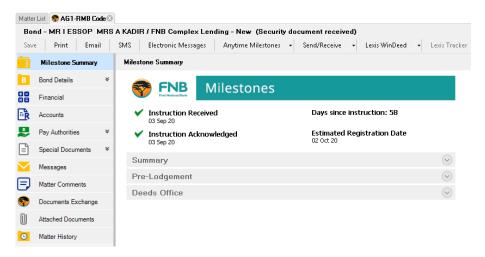
#### FNB Complex Lending Bonds

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	d ►
FNB Private Client - Bond	•
FNB Private Wealth - Bond	+

Open FNB Complex Lending matters.

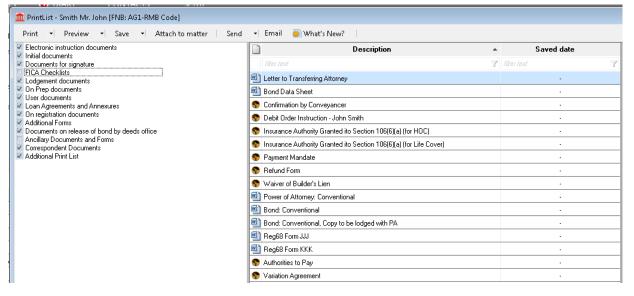




Customise the FNB Complex Lending Bonds Milestone Configuration.

ERS	REPORTS	DIARY	CONTACTS	SETUP	
Milestone I	Process Confi	guration			
New 👻	Delete	Derive Sync Der	rived Processes Expo	rt Import	
		ank Housing Fina			
₽		ank Limited Bond			
	FNB Con	plex Lending			
	⊿ In	struction Group			
	⊳	Instruction Receiv	ed		
	Þ	Instruction Acknow	wledged		
	⊳	Request for Amend	dment		
	Þ	Amended Instructi	ion		
	⊳	Correction Comple	ted		
	⊳	Request for NTU			
	Þ	NTU			
	Þ	Cancel to Reassign	1		
	⊳	2	n Acknowledgement		
	Þ	Withdraw Instruct	-		

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<sup>\*</sup>
- Absa Private Bank new Loans Debit Authority.gd<sup>\*</sup>
- Nedbank Limited new DebiCheck Awareness Letter.gd<sup>\*</sup>
- Nedbank Limited new Life Cover Waiver Form.gd
- FNB Complex Lending new document suite<sup>\*\*</sup>

\* 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

WebConvey - Institution Branding - Nedbank Private Wealth

Lexis Tracker performance improvements

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

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

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

