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 Always save between matter tabs? □
My Settings	*	Close send/receive dialog when
Our Branches (6) Notice Subscriptions		
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:	
 % Albaraka Bank Limited (1) m Beech Finance Limited (1) 	Status affidavit with sureties?	
 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Number of copies of guarantees:	A V
D BoE Private Bank (1) 1 10 10 10 10 10 10 10 10 10 10 10 10 10	Default our ref: *	•
 Evaluation Control Control Cullinan Holdings Limited (1) Cullinan Holdings Limited (1) 	Postage and petities amount:	
 Statistics in transce company of FirstRand Bank Limited (8) Statistics (1) 	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:	
 HIP Housing Investment Partner IDC of SA Ltd (1) 	FICA fee for juristic parties:	
Transfers ¥	Firm trust account exists?	

Bidvest Bank Limited

Firm Settings	*	Bidvest Bank Limited	
	*	- Institution Details	
Users	*	Is this institution active?	
		To this institution detire :	
My Settings	*	Name:	Bidvest Bank Limited
Dur Branches (6)			
Notice Subscriptions		Group code: *	BDV
Common	¥	Must guarantees be numbered?	
		Next guarantee number:	
Bonds	*	Next guarantee humber.	×
ABSA Commercial	Property •	Prefix to guarantee number:	
ABSA Private Bani	km 🗌	r form to guarantee number.	
🕨 蘍 Afgri Operations Lt		Suffix to guarantee number:	
🕨 🕺 Albaraka Bank Lim		-	
D m Beech Finance Lin		Status affidavit with sureties?	
Bidvest Bank Li			
Blue Strata Trading		Number of copies of guarantees:	
D BoE Private Bank		Default our ref: *	
Image: Business Partners		Derault our rer:	•
👂 🏛 Cullinan Holdings L		Postage and petties amount:	
Eskom Finance Co		Postage and petites amount.	
FirstRand Bank Lir		Deeds search fee amount:	
FNB Comm (LCS) (Deeds sediciffee anount.	
FNB Commercial P		FICA fee payable for first bonds?	E
FNB Private Client			
Find Find Bank Lim		FICA fee payable for further	
Image: A state of the state		bonds?	
Habib Overseas B B III HBZ Bank Limited		FICA fee for individuals:	
HP Housing Investment		FICA FEE TOF INDIVIDUAIS.	
P INP Housing Investment DC of SA Ltd (1)		FICA fee for juristic parties:	
V 💷 IDC of SA Ltd (1)	-	incented for junate parties.	
Transfers	*	Firm trust account exists?	E
(and to to to		r inn diast decourte 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	
 Our Branches (6) Notice Subscriptions 		Group code: * SWS	
Common	¥	Must guarantees be numbered? 🗖	
Bonds	*	Next guarantee number:	
 Image: HBZ Bank Limited (1) Image: Hip Housing Investment Partner 		Prefix to guarantee number:	
 IDC of SA Ltd (1) Investec Bank Limited (1) 		Suffix to guarantee number:	
🗁 🏄 Ithala Limited (1)		Status affidavit with sureties? 🗖	
 Mercantile Bank Limited (1) Metcash Trading Africa (Pt 	y I	Number of copies of guarantees:	
 Redbank Business Banking Redbank Limited (7) 	9	Default our ref: * DawnM	
 Redbank Property Finance Reoples Bank Limited (1) 	I	Postage and petties amount:	
 m Protea Diamonds (Pty) Limi M RMB Private Bank (Lotus N 		Deeds search fee amount:	
 Sanlam Home Loans (1) Senwes Limited (1) 		FICA fee payable for first bonds?	
Genwes Limited [1] Genwes Limited [1] Genwes Limited [1] Genwes Limited [1] Genwes Limited [1]		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.

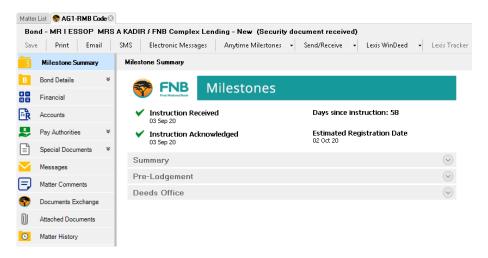
FNB Complex Lending Bonds

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	•
FNB Private Client - Bond	•
FNB Private Wealth - Bond	•

Open FNB Complex Lending matters.

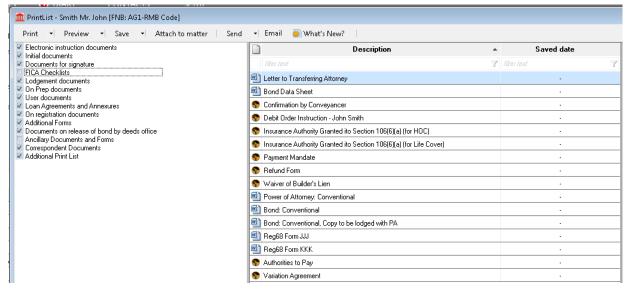




Customise the FNB Complex Lending Bonds Milestone Configuration.

_	_				
ERS	REPORTS	DIARY	CONTACTS	SETUP	
Milestone	Process Confi	guration			
New 👻	Delete	Derive Sync Der	ived Processes Expo	rt Import	
⊳		ank Housing Finar	nce Bond		
₽	i institutita B	ank Limited Bond			
	FNB Con	plex Lending			
	⊿ In	struction Group			
	\triangleright	Instruction Receive	ed		
	Þ	Instruction Acknow	vledged		
	⊳	Request for Amend	lment		
	⊳	Amended Instructi	on		
	⊳	Correction Comple	ted		
	Þ	Request for NTU			
	⊳	NTU			
	Þ	Cancel to Reassign			
	⊳	-	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*
- 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 3rd 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

