

Lexis Convey v17.2.18

Release Notes

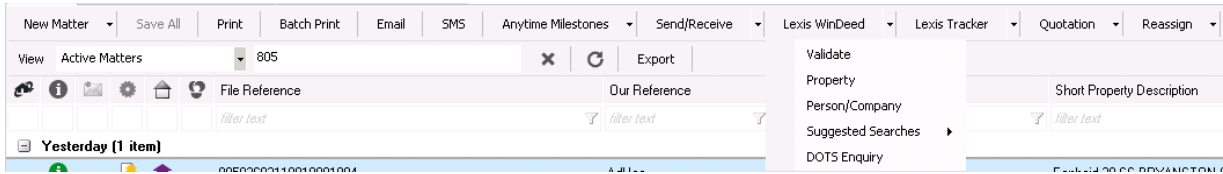
2020/12/04

TABLE OF CONTENTS

Matter List Improvements: Lexis WinDeed	2
Setup: My Settings – Save Documents To	2
New Accounting Reference fill point.....	3
Lexis Tracker: Secure Chat	3
New Bond Institutions	4
Grindrod Bank Limited.....	4
Bidvest Bank Limited	4
Senwes Limited	5
FNB Complex Lending Bonds	5
Document Maintenance	6
Maintenance	7

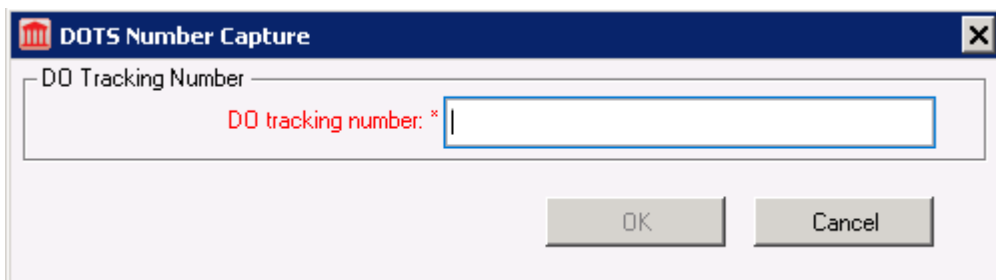
Matter List Improvements: Lexis WinDeed

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



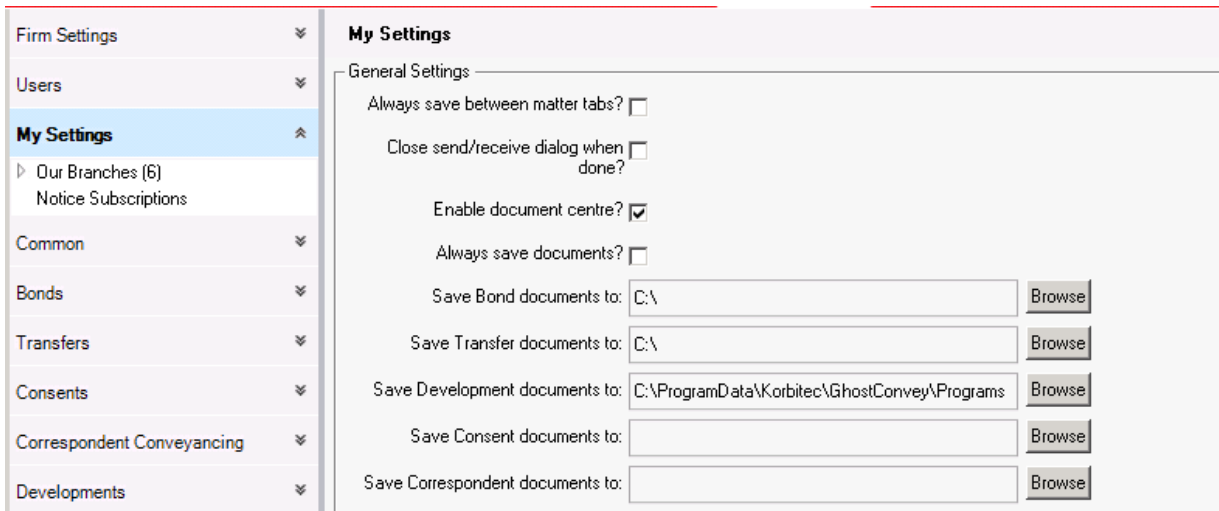
A new **DOTS Enquiry** Search option has been added to the Lexis WinDeed button.

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.

Firm Settings	Grindrod Bank Limited
Users	Institution Details
My Settings	Is this institution active? <input type="checkbox"/>
▷ Our Branches (6)	Name: Grindrod Bank Limited
Notice Subscriptions	Group code: * GRD
Common	Must guarantees be numbered? <input type="checkbox"/>
Bonds	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	
▷ Grindrod Bank Limited (1)	
▷ Habib Overseas Bank Limite	
▷ HBZ Bank Limited (1)	
▷ HHP Housing Investment Partner	
▷ IDC of SA Ltd (1)	
Transfers	

Bidvest Bank Limited

Activate Bidvest Bank Limited under Setup > Bonds > Institutions.

Firm Settings	Bidvest Bank Limited
Users	Institution Details
My Settings	Is this institution active? <input type="checkbox"/>
▷ Our Branches (6)	Name: Bidvest Bank Limited
Notice Subscriptions	Group code: * BDV
Common	Must guarantees be numbered? <input type="checkbox"/>
Bonds	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	
▷ Grindrod Bank Limited (1)	
▷ Habib Overseas Bank Limite	
▷ HBZ Bank Limited (1)	
▷ HHP Housing Investment Partner	
▷ IDC of SA Ltd (1)	
Transfers	

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 box]

Suffix to guarantee number: [text box]

Status affidavit with sureties?

Number of copies of guarantees: [dropdown]

Default our ref: * DawnM

Postage and petties amount: [text box]

Deeds search fee amount: [text box]

FICA fee payable for first bonds?

FICA fee payable for further bonds?

FICA fee for individuals: [text box]

FICA fee for juristic parties: [text box]

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**

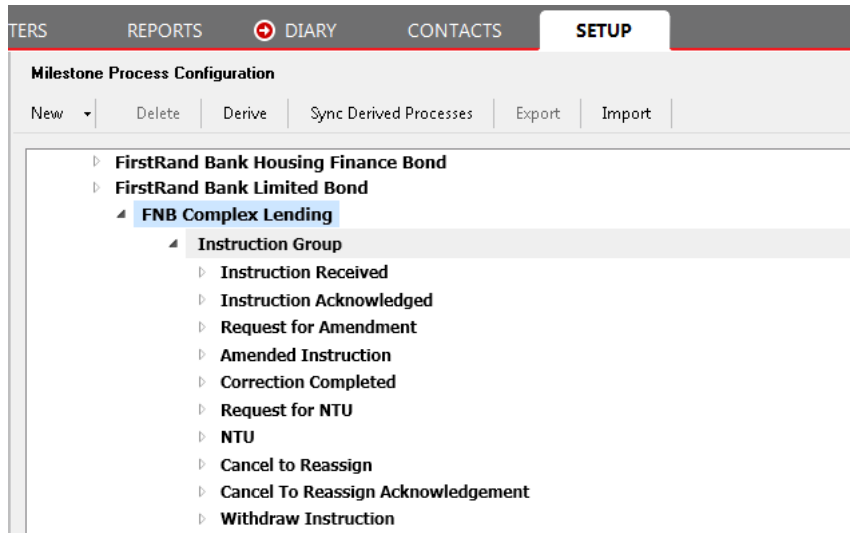
✓ **Instruction Acknowledged** 03 Sep 20 **Estimated Registration Date** 02 Oct 20

Summary [dropdown]

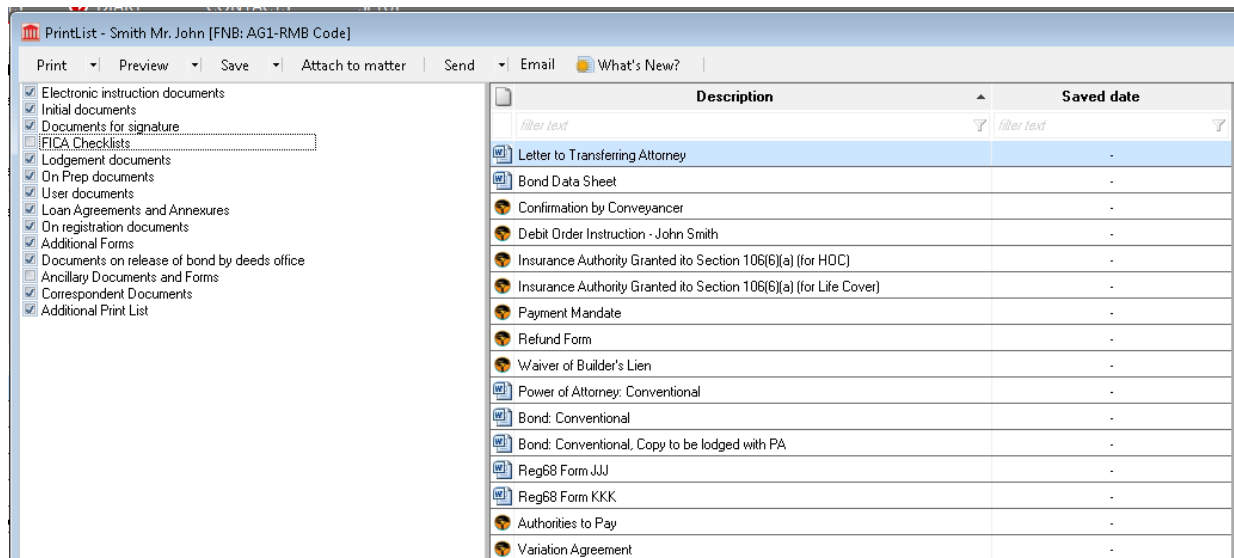
Pre-Lodgement [dropdown]

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 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