Lexis Convey v18.0.0

Release Notes

2021/03/02

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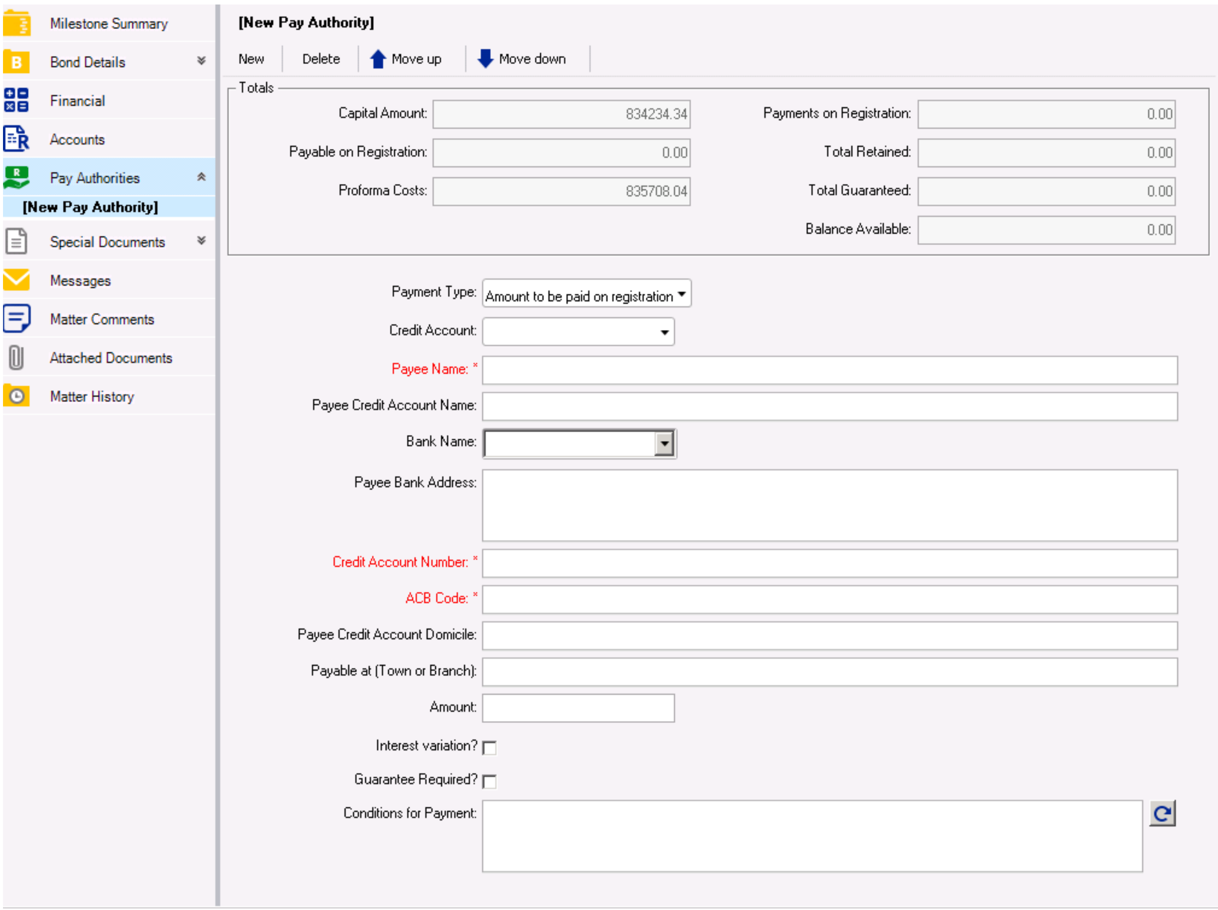
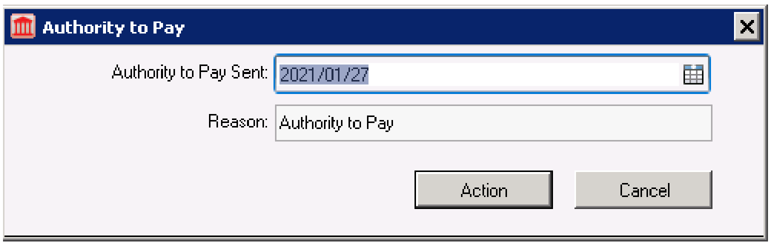
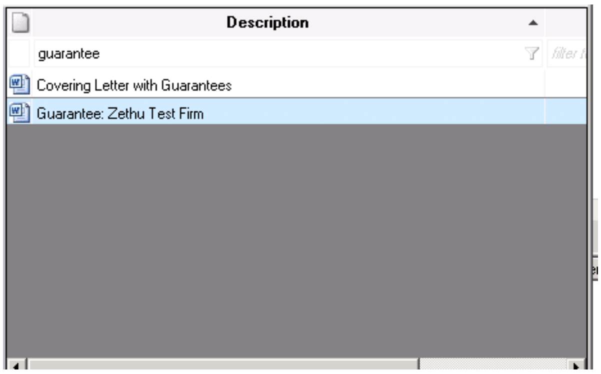
Albaraka – Authority to Pay

The Authority to Pay tab has now been made available for Albaraka Bonds.



The Authority to Pay Milestone will now be available on the Milestone View to action and the new Albaraka Guarantee document will be available in the print list.



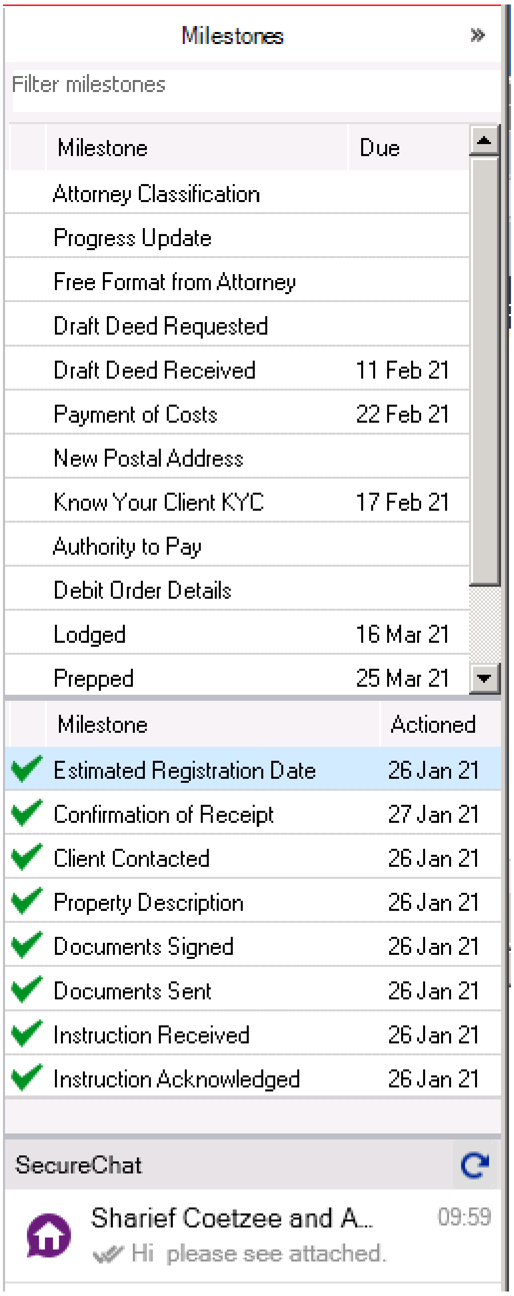


Matter Milestone Pane Improvements

The Milestones panel on the right displays all the Milestones that are available and due on the matter.

A new view has been added to the Milestones panel to display Milestones that have already been completed.

Now your Milestones will be visually separated into due or upcoming and actioned or completed.

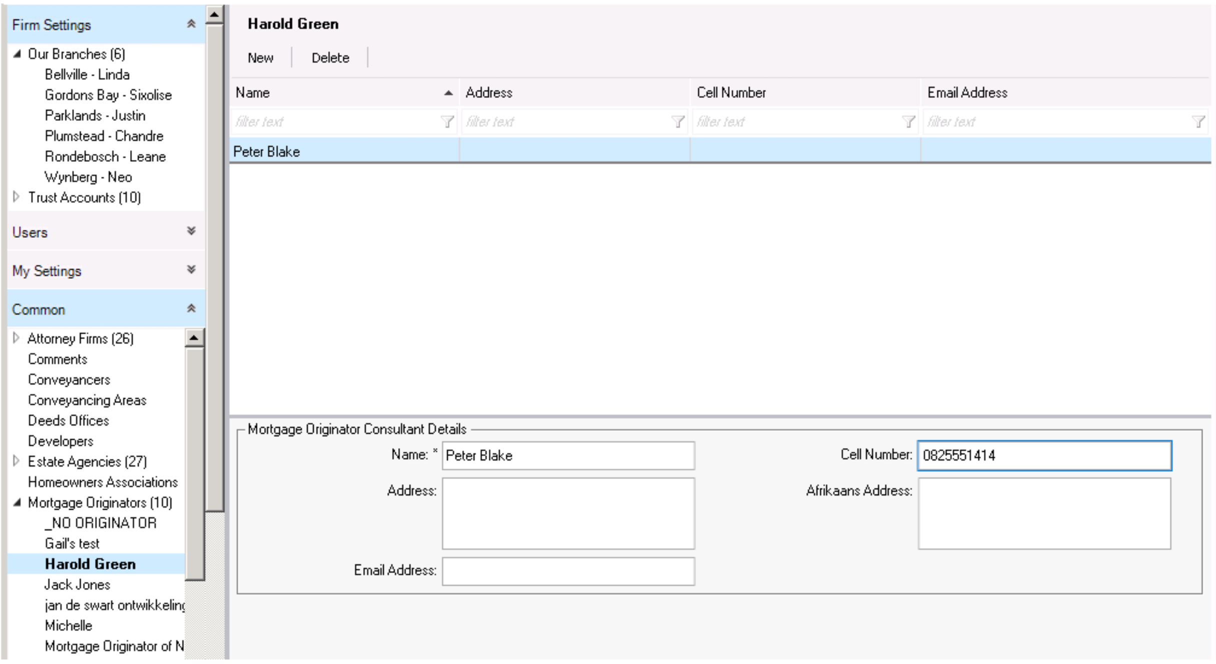


New Mortgage Originator and Consultants for Correspondence

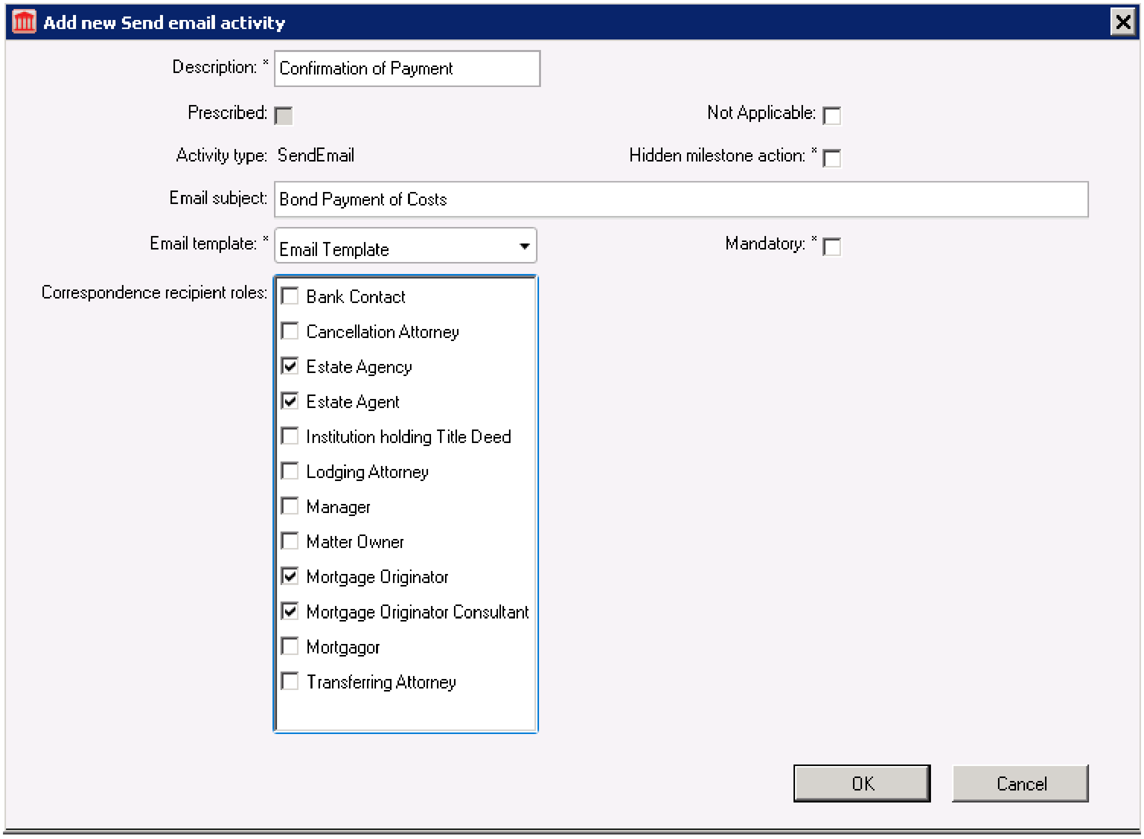
You can now add Mortgage Originator Consultants to a Mortgage Originator Company for all your correspondence needs.

In Setup > Common > Mortgage Originators, select and open the Mortgage Originator, click on the ‘New’ button to add Mortgage Originator Consultants to the Mortgage Originator Company.

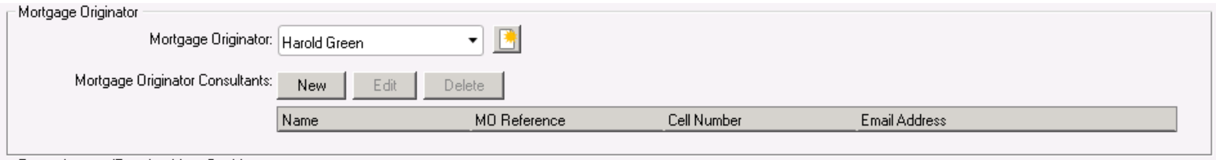
You will now be able to view all the Mortgage Originator Consultants captured for the Mortgage Originator.

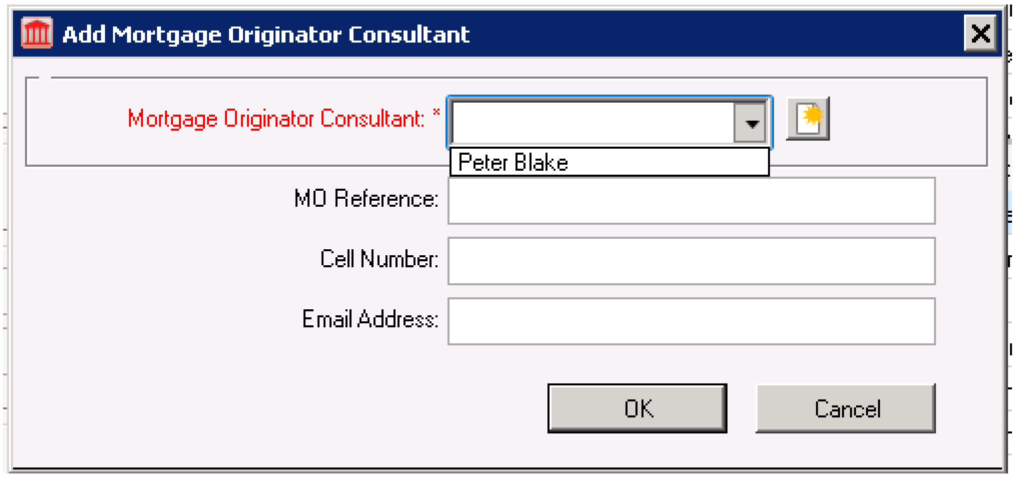


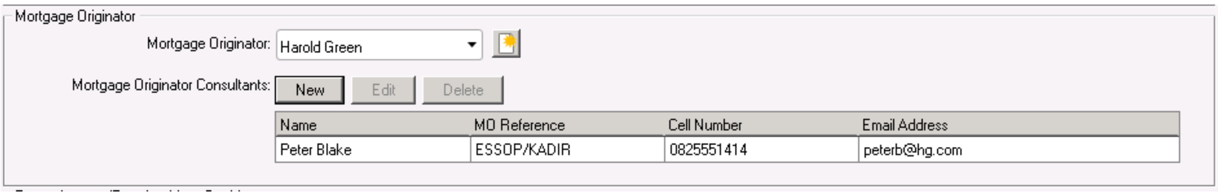
In your Milestone Configuration, you can now include the Mortgage Originator Consultant as a recipient for emails and SMS Milestone Activities.



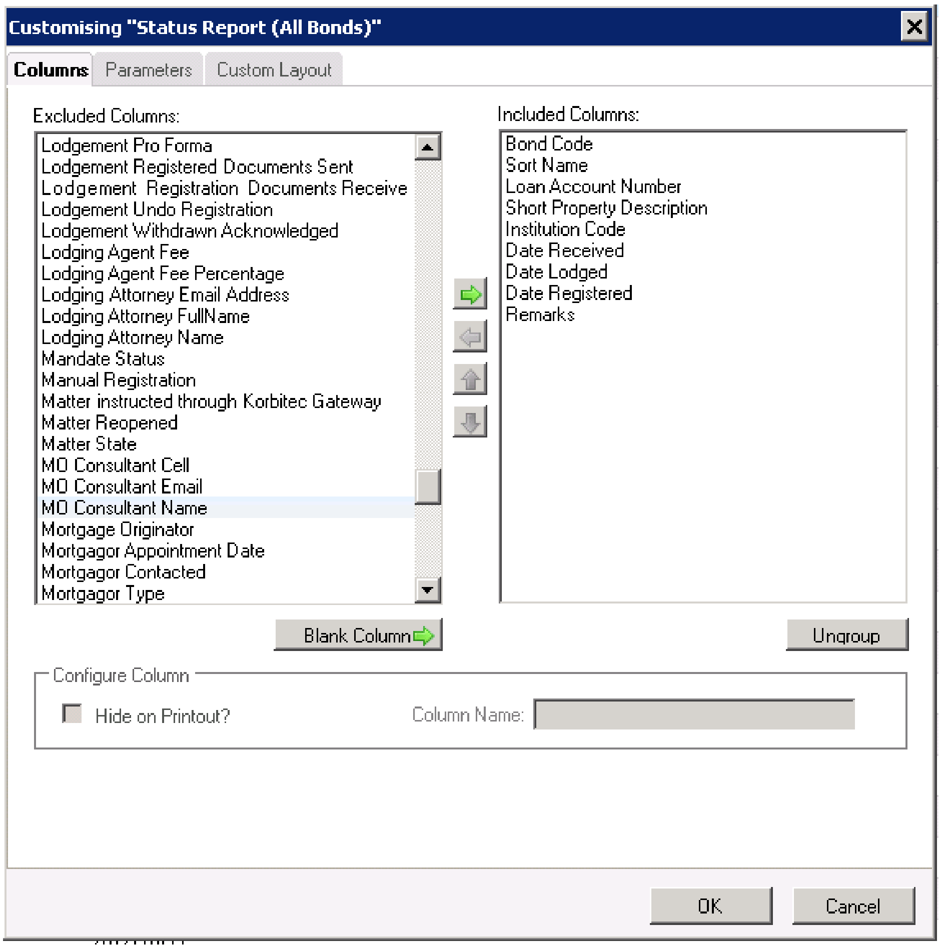
In your matter, on the Correspondence tab, you will now be able to select the Mortgage Originator and add the specific Mortgage Originator Consultant(s) relevant to the matter and correspondence.



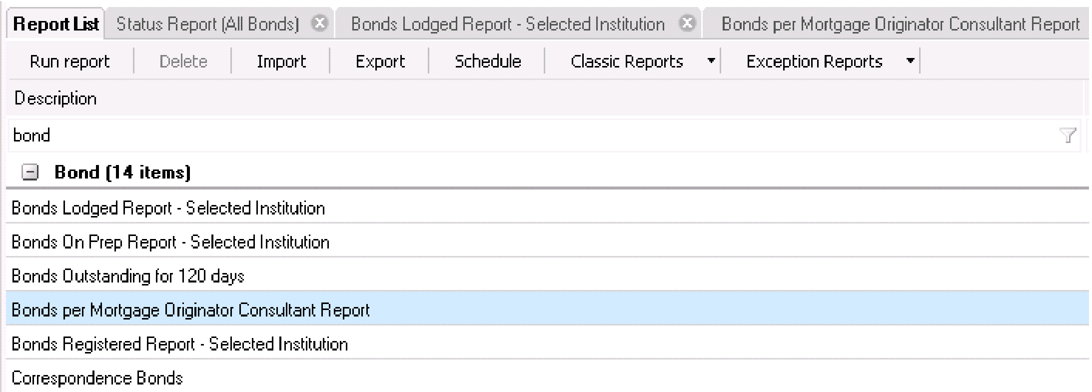




The new Mortgagor Originator Consultants are now available for reporting as well.



A new ‘Bonds per Mortgage Originator Consultant’ report has been added to Reports.



Quick Access to Fill Points

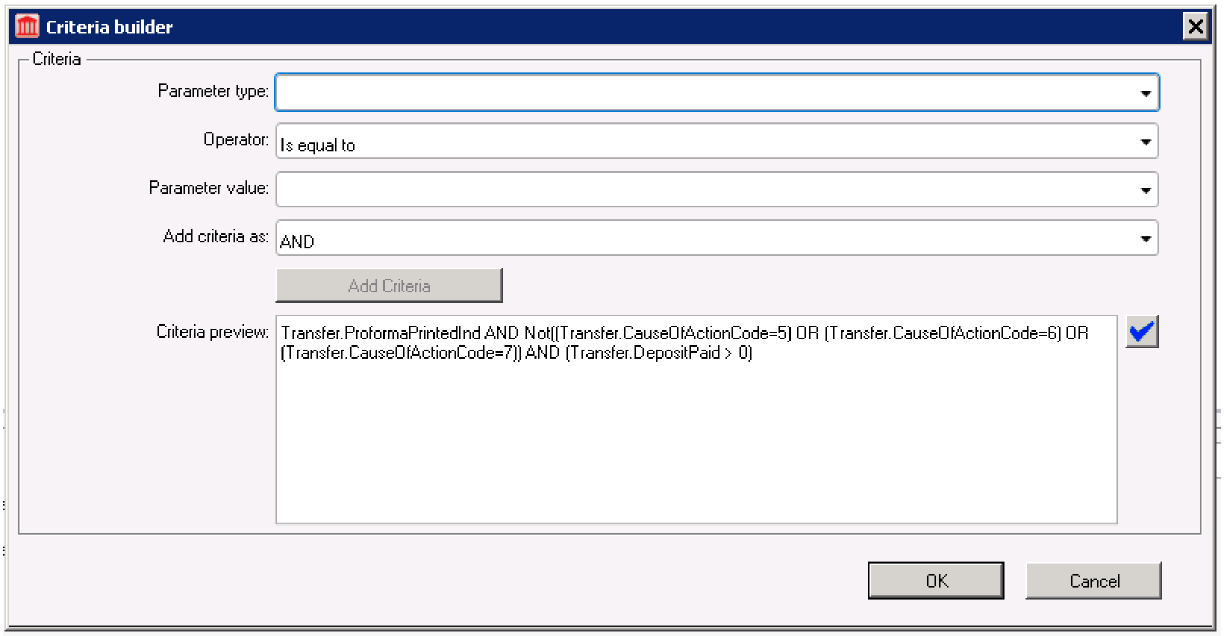
Your fill points are now at your fingertips.

Right click on any field to view its corresponding fill point.

By having easy access to your fill points, template customisation becomes a breeze.

New Criteria Builder for Accounts and Print List Documents

We have improved the functionality and the look and feel of the Criteria builder for Account Items and Print List Documents to offer a better user experience.

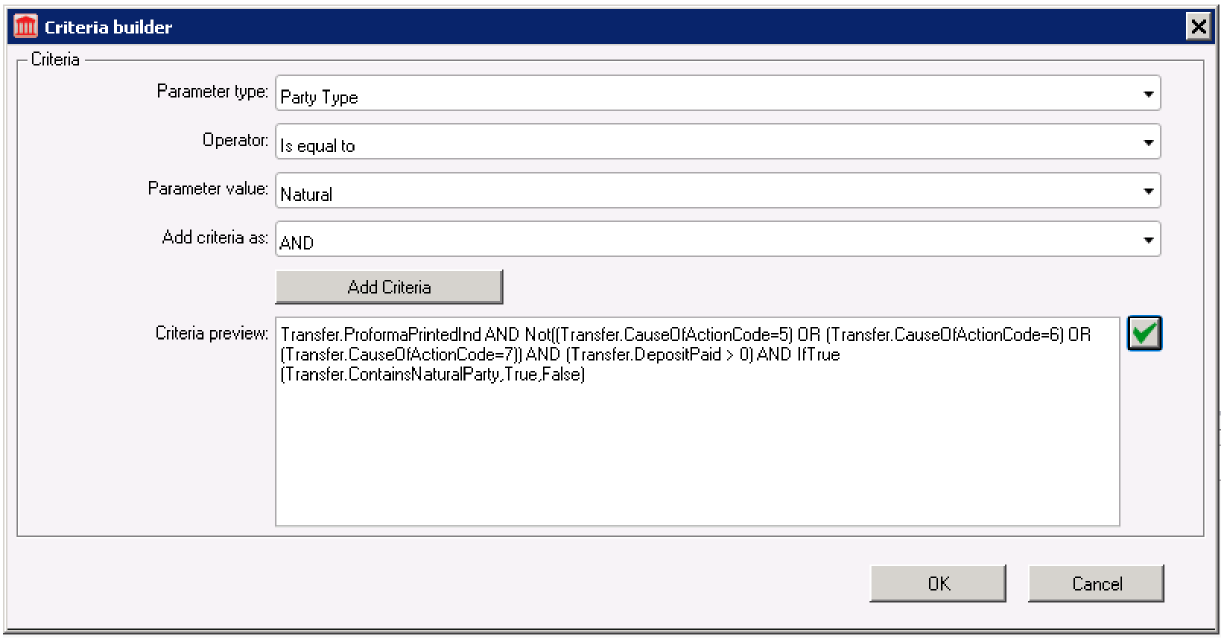


You can now specify more conditions to be evaluated.

The criteria is built up using simple language which makes it much easier to understand.

The criteria is added by simply selecting a Parameter type, the operator, the Parameter value and whether the criteria should be added as "AND" or "OR".

The criteria is evaluated and validated by clicking on the blue tick. A green tick indicates that there are no errors.



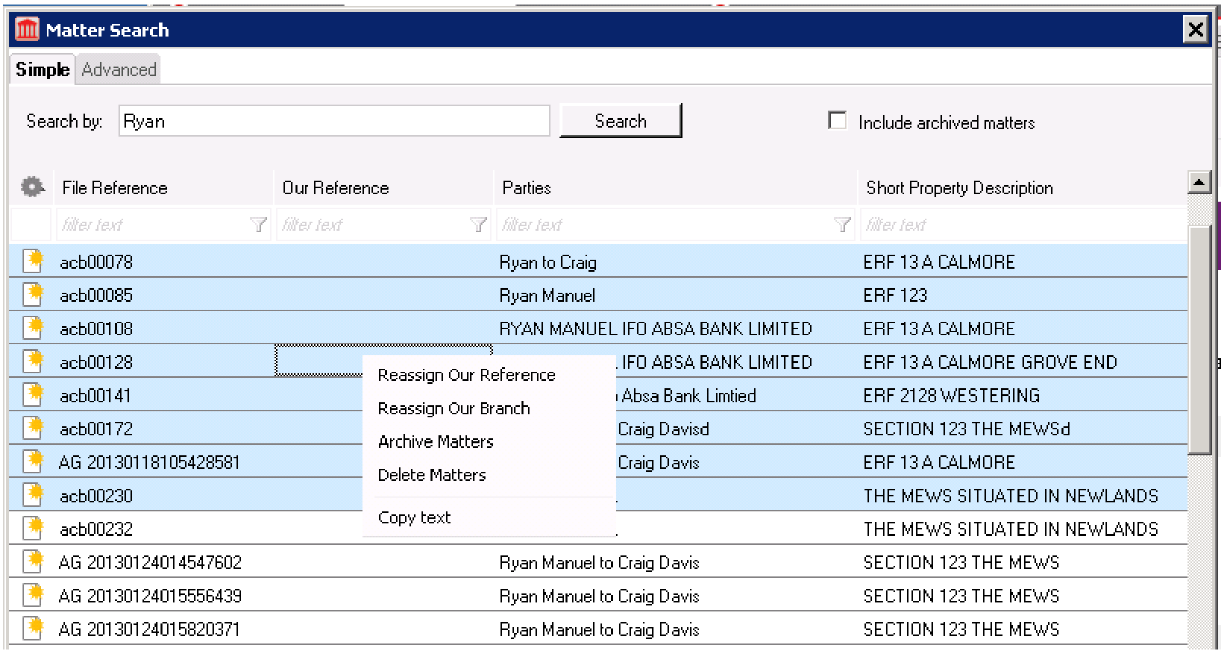
Using the Criteria Builder gives you more control and customisation of your matters.

New Data Management Tools

We have developed new data management tools to help you to quickly and efficiently manage your matters.

The following options are now available on the right click menu in the Matter Search dialog:

- Reassign Our Reference
- Reassign Our Branch
- Archive Matters
- Delete Matters

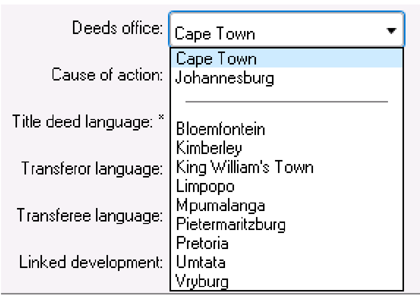


You are now able to multi-select matters from within the Matter Search dialog and perform bulk actions to Reassign Our References, Reassign Our Branches, Archive and Delete matters.

New Smart Dropdown Lists

Lexis Convey now has smart dropdown lists.

The options you select the most often will now appear at the top of the list, making it easier and faster for you to capture your data.



Below is the list of smart dropdown lists per matter type:

Bond:

- Bank branch name
- Deeds Registry
- Conveyancer
- Appearer
- Conveyancers for PA

Transfer:

- Transfer Details
  - Deeds Office

    - Township Planning Act
    - Conveyancer
    - Appearer
    - Conveyancers for PA
- Correspondence
    - Transferor Estate Management Co
    - Transferee Estate Management Co
    - Cancellation attorney
    - Institution holding title deeds
    - Bond attorney
    - Rates clearance agent
    - Managing agents
    - Home Owners Association
    - Estate agency / Instructing bank
    - Listing estate agency
- Financial
    - Electrical contractor
    - Borer contractor
- Sars
    - Conveyancer
- From spreadsheet/Import:
    - Township Planning Act

Consent:

- Deeds Office
- Consenter
- Preparer

Cancellation Requests:

- Institution

Development:

- Developer
- Deeds Registry
- Conveyancer
- Preparer
- Estate Agency
- Estate Agent Name
- Mortgage Originator

Correspondent matter:

- Cancellation Attorney
- Transferring Attorney
- Mortgage Originator
- Development
    - Home Owners Association
- Deeds Office
- Transfer
    - Reason for action

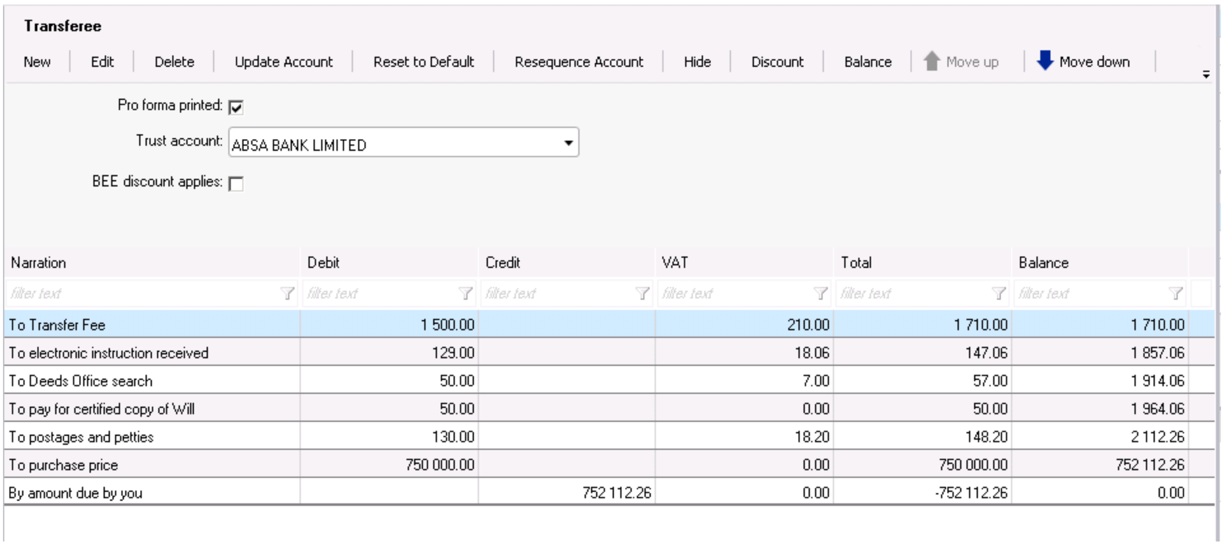
All matter types:
- User Category Values

Create New Matter:

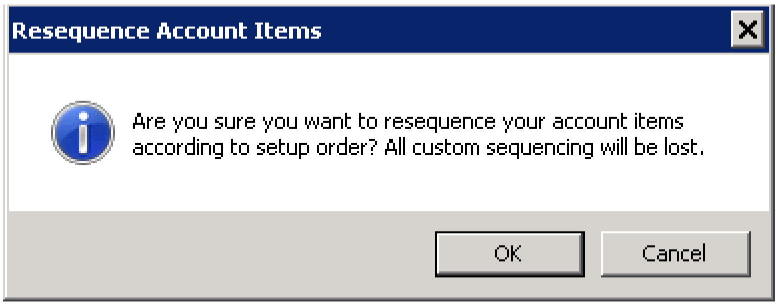
- Development
  - Developer
- Correspondent
  - Cause of action

Sequence Account Items According to Setup Sequence

You can now re-sequence your account items according to the Account Setup Sequence at any time during the lifetime of the matter by clicking on the new 'Resequence Account' button.

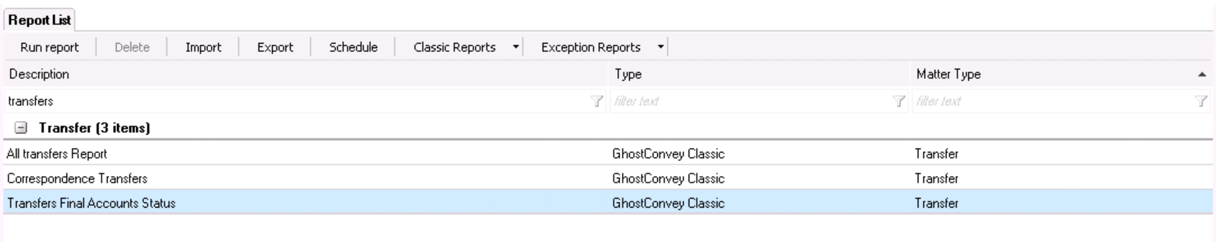


Narration	Debit	Credit	VAT	Total	Balance
To Transfer Fee	1 500.00		210.00	1 710.00	1 710.00
To electronic instruction received	129.00		18.06	147.06	1 857.06
To Deeds Office search	50.00		7.00	57.00	1 914.06
To pay for certified copy of Will	50.00		0.00	50.00	1 964.06
To postages and petties	130.00		18.20	148.20	2 112.26
To purchase price	750 000.00		0.00	750 000.00	752 112.26
By amount due by you		752 112.26	0.00	-752 112.26	0.00



New Transfers Final Accounts Status Report

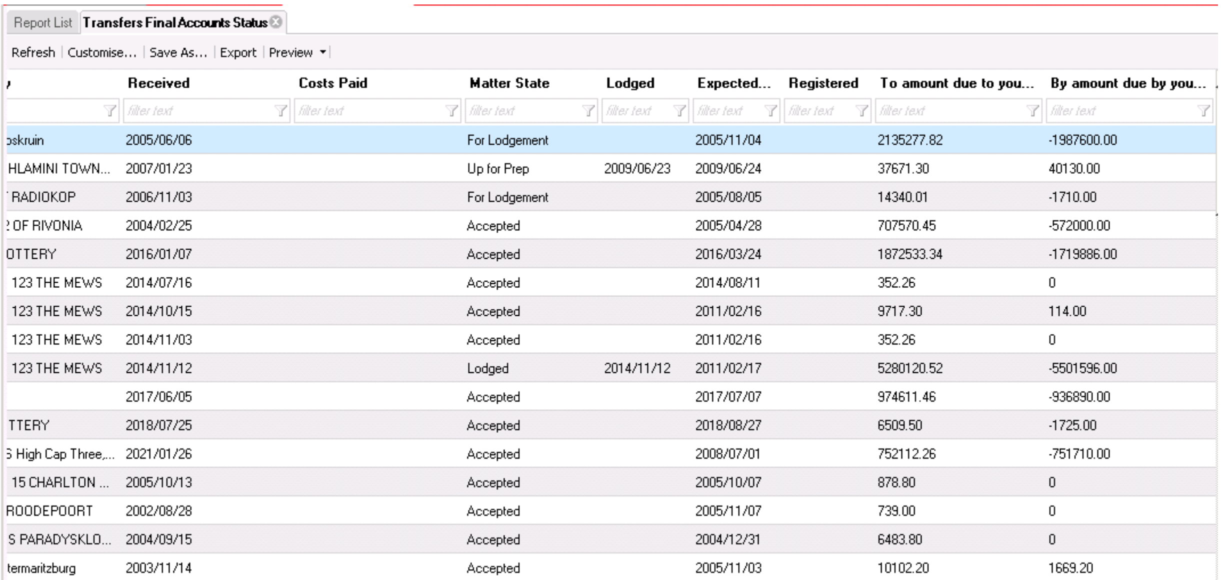
A new report has been made available for Transfers called the 'Transfers Final Accounts Status Report'.



Description	Type	Matter Type
All transfers Report	GhostConvey Classic	Transfer
Correspondence Transfers	GhostConvey Classic	Transfer
Transfers Final Accounts Status	GhostConvey Classic	Transfer

This new Transfers report now has columns for the 'To amount due to you' for the Transferee and the 'By amount due by you' (Transferor) as per the final account.

Running this report will give you a clear indication on the status of your final account and indicate any shortfalls that needs to be recovered.

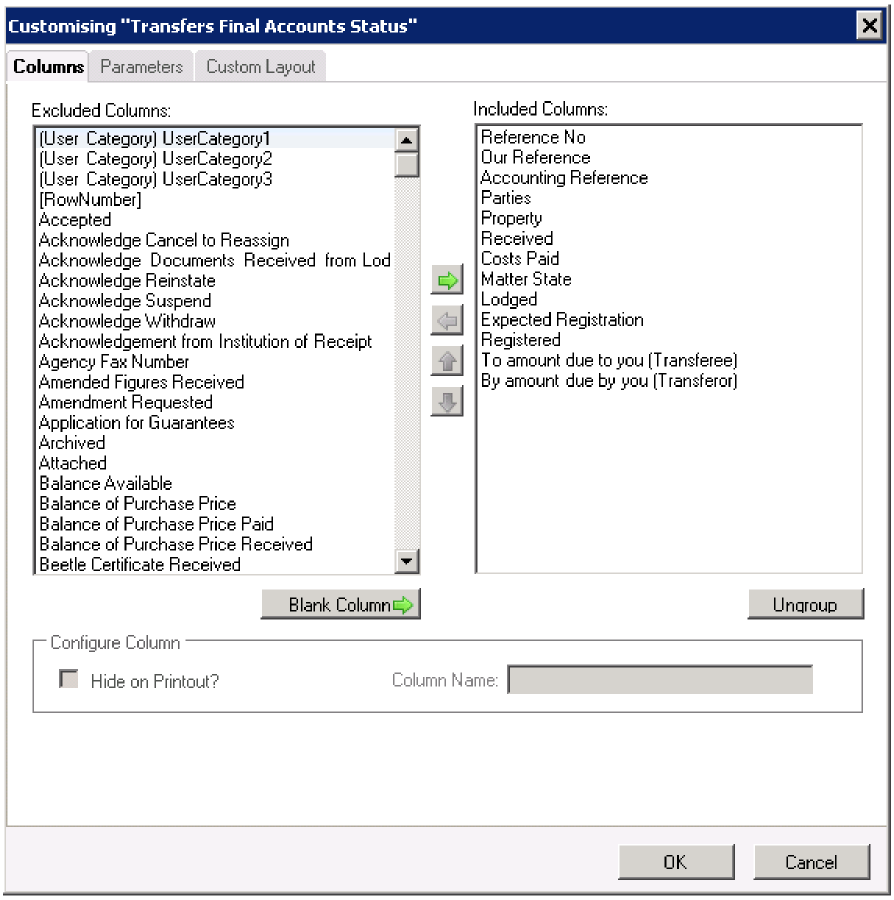


,	Received	Costs Paid	Matter State	Lodged	Expected...	Registered	To amount due to you...	By amount due by you...
oskruin	2005/06/06		For Lodgement		2005/11/04		2135277.82	-1987600.00
HLAMINI TOWN...	2007/01/23		Up for Prep	2009/06/23	2009/06/24		37671.30	40130.00
RADIOKOP	2006/11/03		For Lodgement		2005/08/05		14340.01	-1710.00
OF RIVONIA	2004/02/25		Accepted		2005/04/28		707570.45	-572000.00
OTTERY	2016/01/07		Accepted		2016/03/24		1872533.34	-1719886.00
123 THE MEWS	2014/07/16		Accepted		2014/08/11		352.26	0
123 THE MEWS	2014/10/15		Accepted		2011/02/16		9717.30	114.00
123 THE MEWS	2014/11/03		Accepted		2011/02/16		352.26	0
123 THE MEWS	2014/11/12		Lodged	2014/11/12	2011/02/17		5280120.52	-5501596.00
	2017/06/05		Accepted		2017/07/07		974611.46	-936890.00
TTERY	2018/07/25		Accepted		2018/08/27		6509.50	-1725.00
High Cap Three,...	2021/01/26		Accepted		2008/07/01		752112.26	-751710.00
15 CHARLTON ...	2005/10/13		Accepted		2005/10/07		878.80	0
ROODEPOORT	2002/08/28		Accepted		2005/11/07		739.00	0
S PARADYSKLO...	2004/09/15		Accepted		2004/12/31		6483.80	0
termaritzburg	2003/11/14		Accepted		2005/11/03		10102.20	1669.20

The 'Transfers Final Accounts Status' report displays the following columns:

- File Reference
- Our Reference
- Accounting Reference
- Parties
- Property
- Date Received
- Pro forma Costs Received
- Matter State
- Date Lodged
- Estimated Registration Date
- Date Registered
- To amount due to you (Transferee)
- By amount due by you (Transferor)

All other Transfer report fields are available for additional customisation.



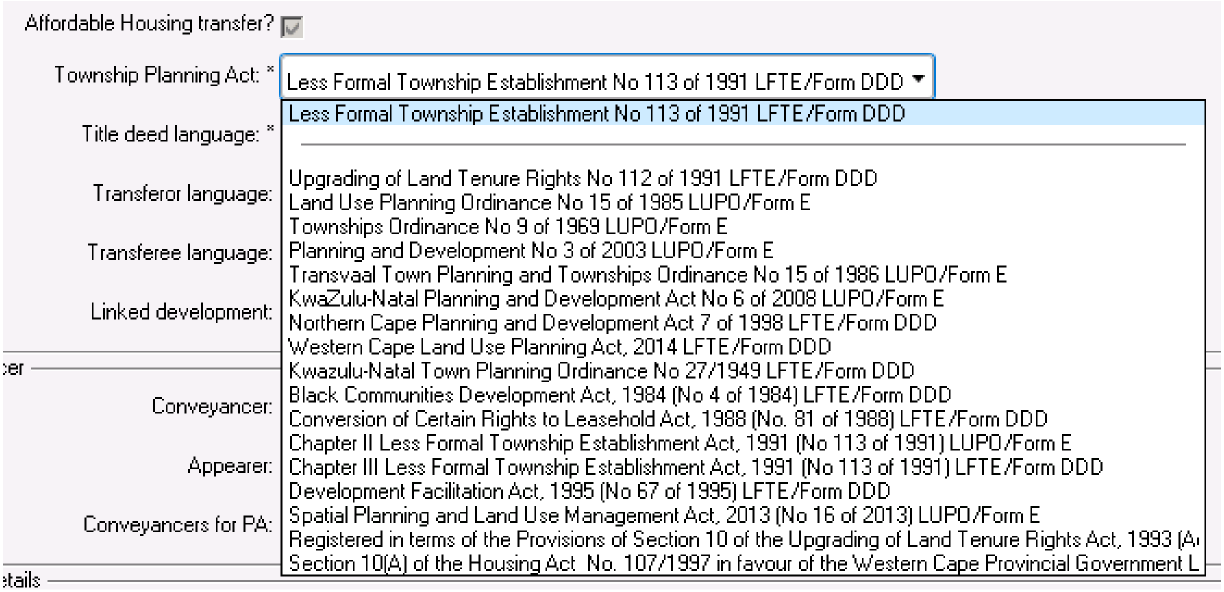
Affordable Housing and Subsidy Housing Transfer Improvements

Additional Township Planning Acts

The following Township Planning Acts have now been made available to Affordable Housing and Subsidy Housing Transfers.

Township planning act	Prescribed form
Black Communities Development Act, 1984 (No 4 of 1984)	LFTE /Form DDD
Conversion of Certain Rights to Leasehold Act, 1988 (No. 81 of 1988)	LFTE /Form DDD
Chapter II Less Formal Township Establishment Act, 1991 (No 113 of 1991)	LUPO /Form E
Chapter III Less Formal Township Establishment Act, 1991 (No 113 of 1991)	LFTE /Form DDD
Development Facilitation Act, 1995 (No 67 of 1995)	LFTE /Form DDD
Spatial Planning and Land Use Management Act, 2013 (No 16 of 2013)	LUPO /Form E
Registered in terms of the Provisions of Section 10 of the Upgrading of Land Tenure Rights Act, 1993 (Act No 126 of 1993)	LFTE /Form DDD
Section 10(A) of the Housing Act No. 107/1997 in favour of the Western Cape Provincial Government	LFTE /Form DDD

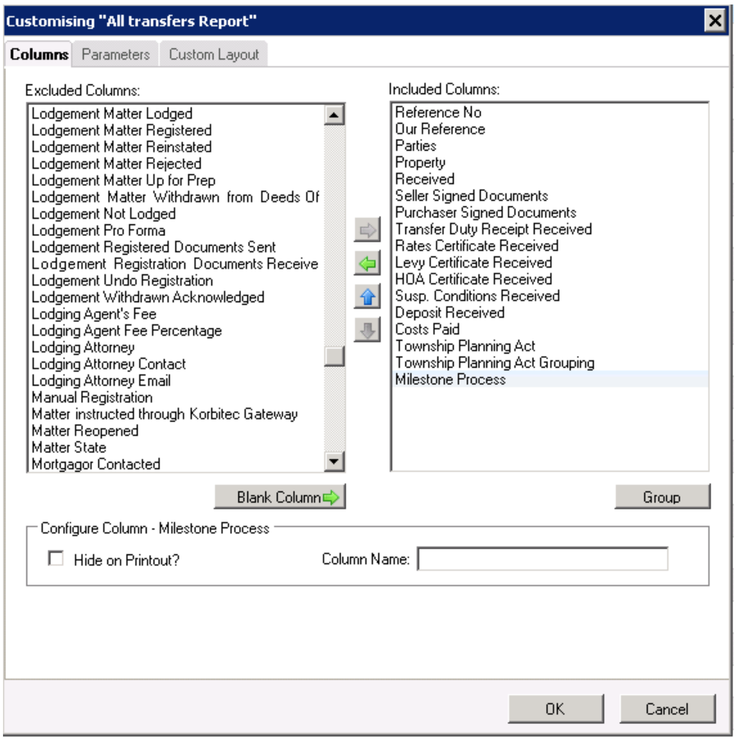
All Township Planning Acts will now indicate the Prescribed Form by appending the Township Planning Act description with either (LFTE/Form DDD) or (LUPO/Form E).



Reports

The following columns and parameters are now available on Transfer Reports to customise for Affordable Housing and Subsidy Housing Transfers:

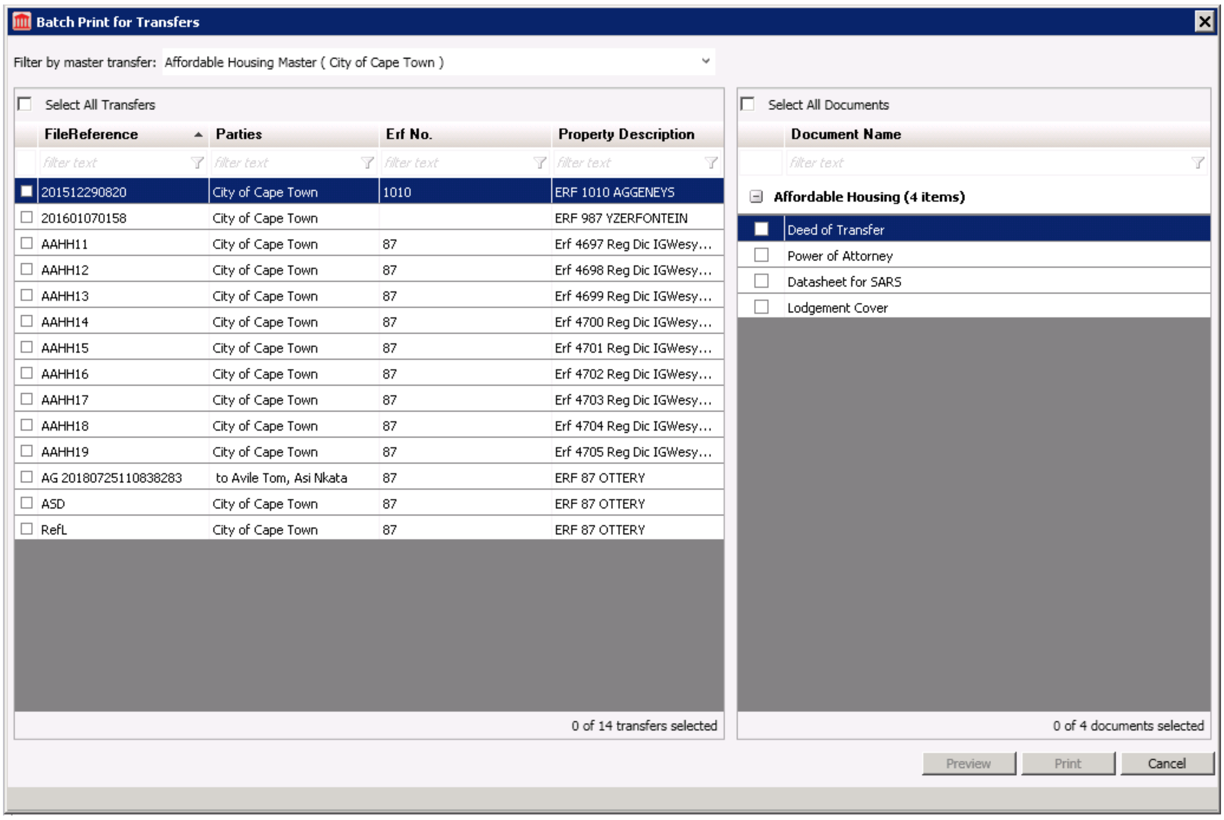
- Date Received From
- Date Received To
- Township Planning Act
- Milestone Process
- Township Planning Act Grouping (Form DDD or Form E)



Batch Printing for Transfers

We have made some improvements to the Batch Print for Transfers functionality.

A new ‘Erf No.’ or ‘Section No.’ column has been added next to the ‘Property Description’ column in the Transfers selection grid. You will now be able to filter or order on this column.

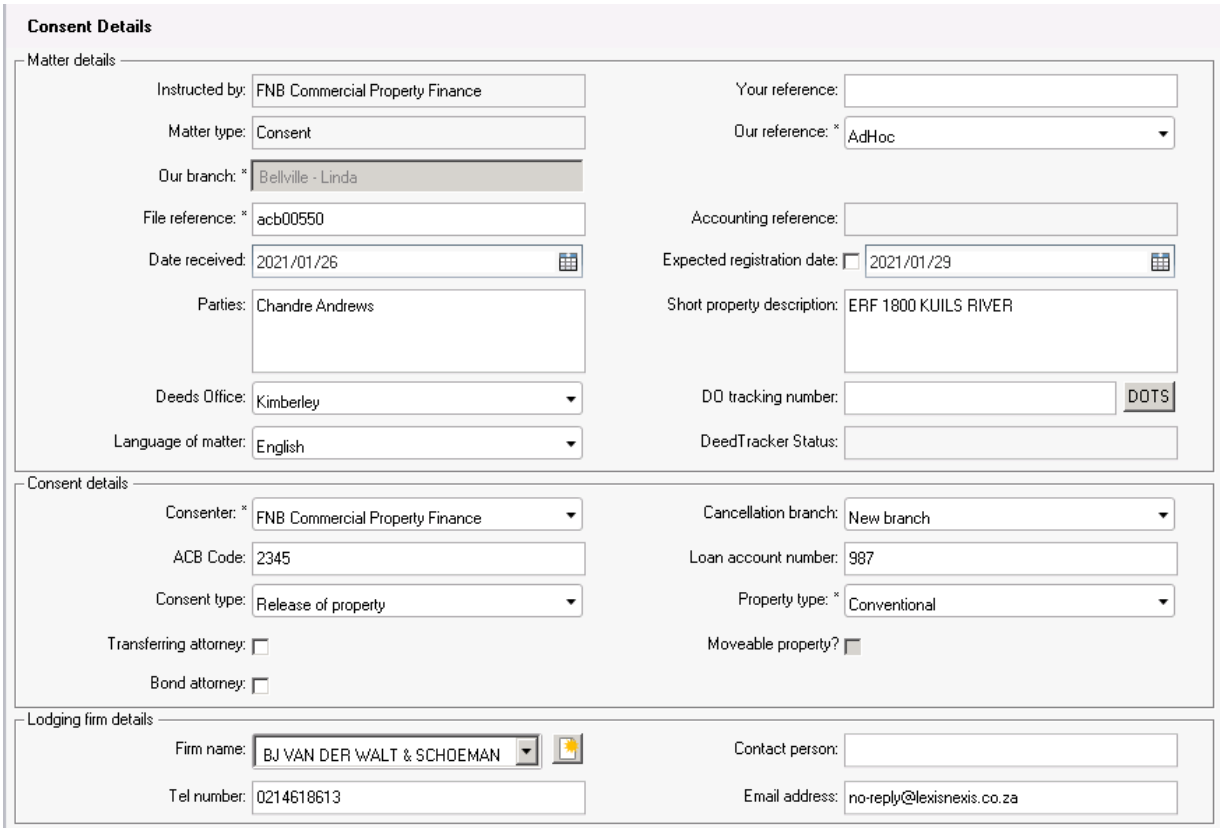


Consent Module Improvements

We have given Consents a bit of a user interface and functionality refresh to be more closely aligned with the Bond and Transfers matter types.

New Lodging Attorney Details

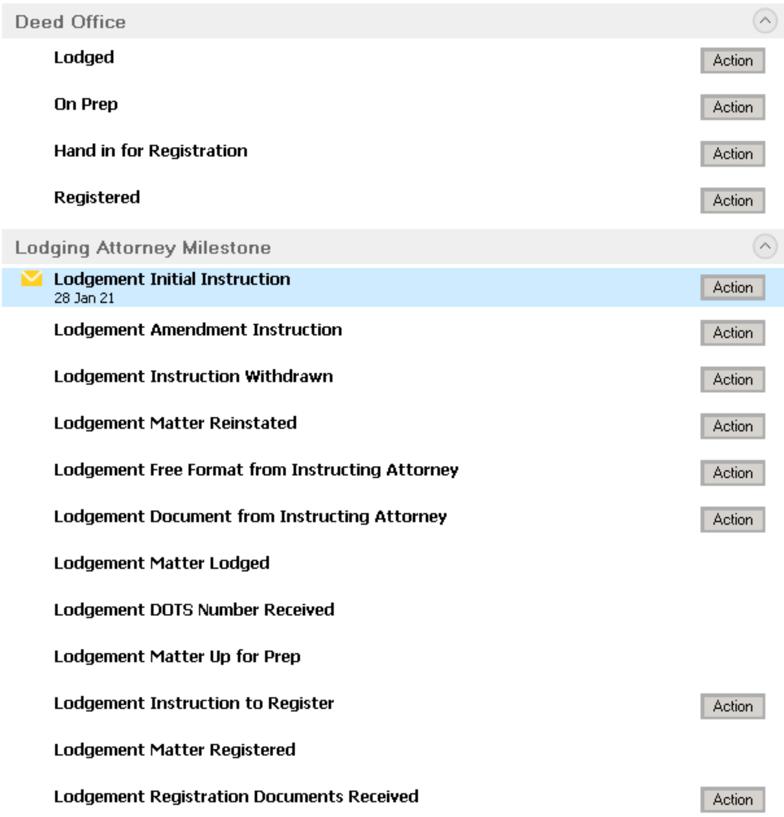
You will now be able to capture your Lodging Attorney firm details on the Consent Details tab.



A new 'Lodging firm details' section is now available on the Consent Details tab and will be displayed when there is a Lodging Attorney applicable to the matter.

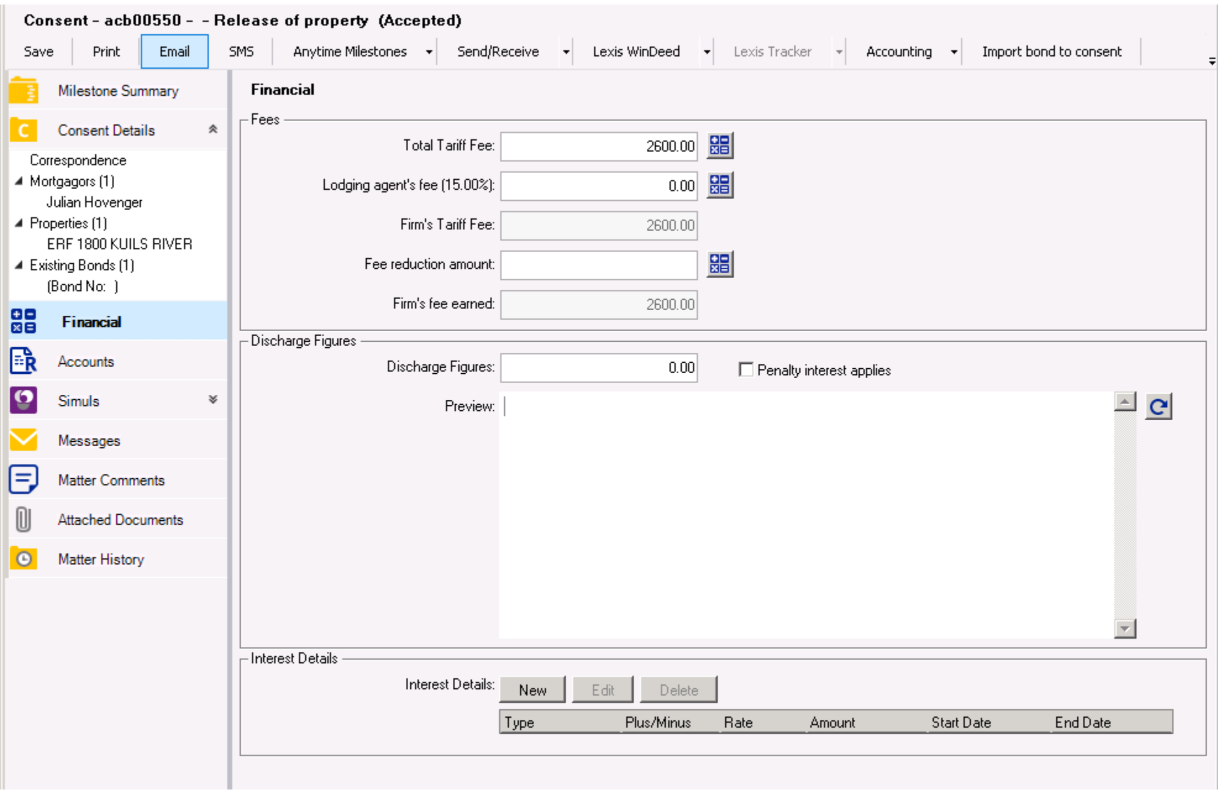
The Lodging Attorney details will reflect on the Simuls tab as well.

The Lodging Attorney is now saved as a correspondence recipient and the Lodging Attorney Milestones will now become available on the Milestone View.



New Financial Tab

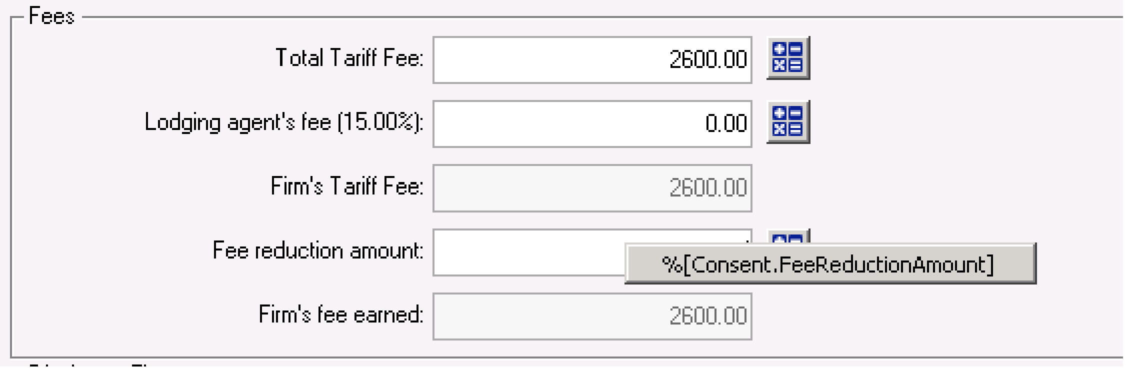
Consents will now have a new Financial tab where you can capture all the financial information including new fee financial fields, the Discharge Figures and Interest details.



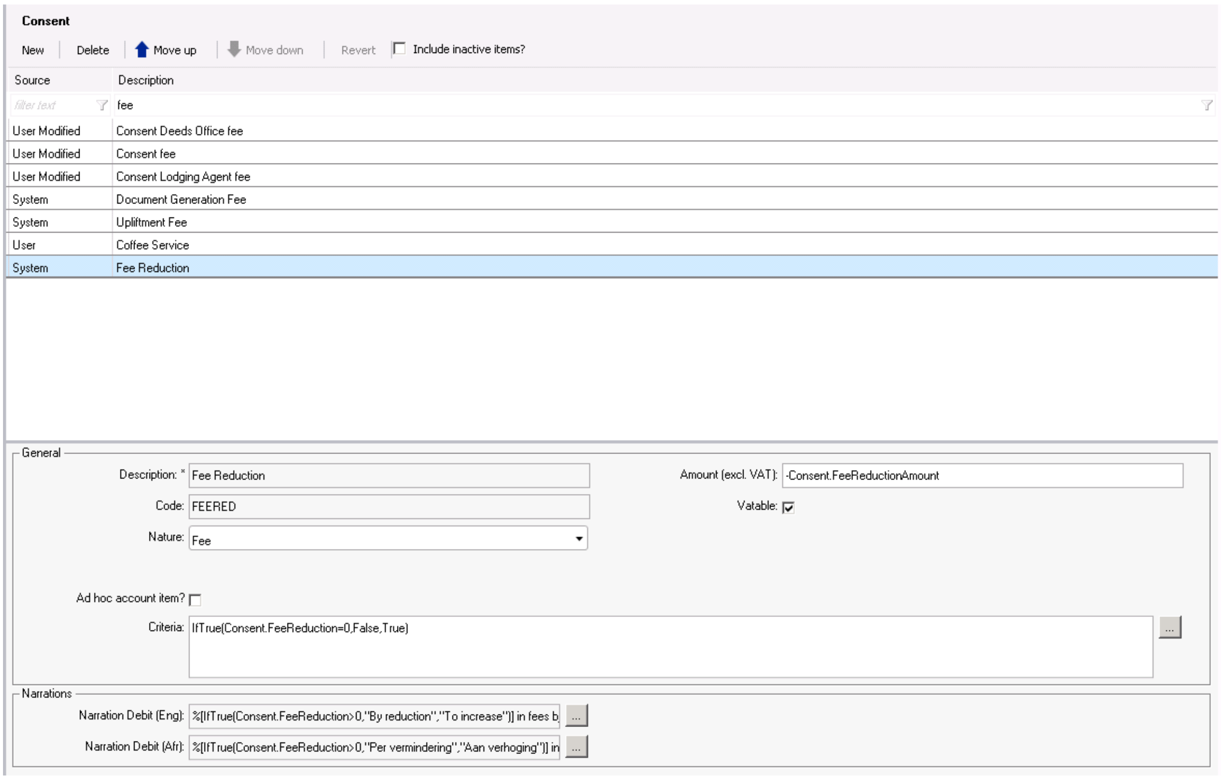
The following new Fees financial fields are now available:

- Total Tariff Fee
- Lodging Agent Fee (if applicable)
- Firm's Tariff Fee
- Fee Reduction Amount
- Firm's Fee Earned

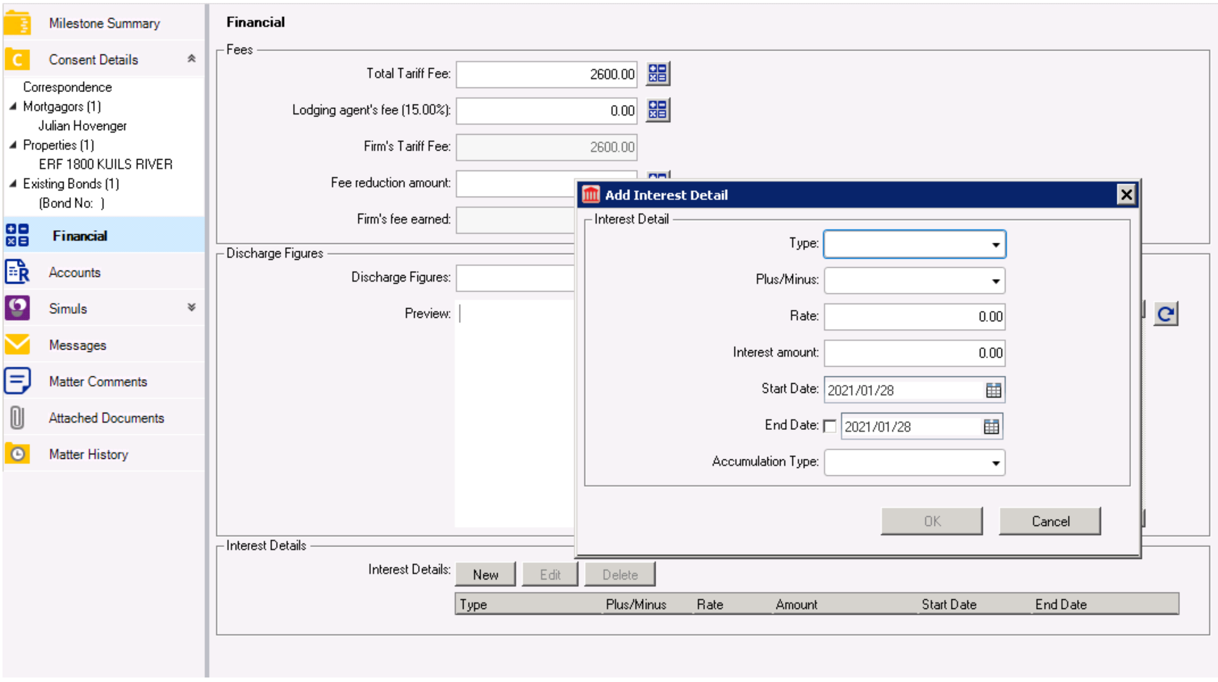
A new Fee Reduction fill point and Setup Accounting Item has been added to Consents.

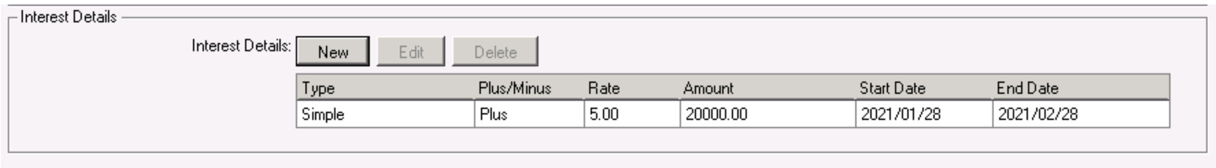


Setup > Account Items > Consents



The Interest Details are now displayed in a functional grid view.



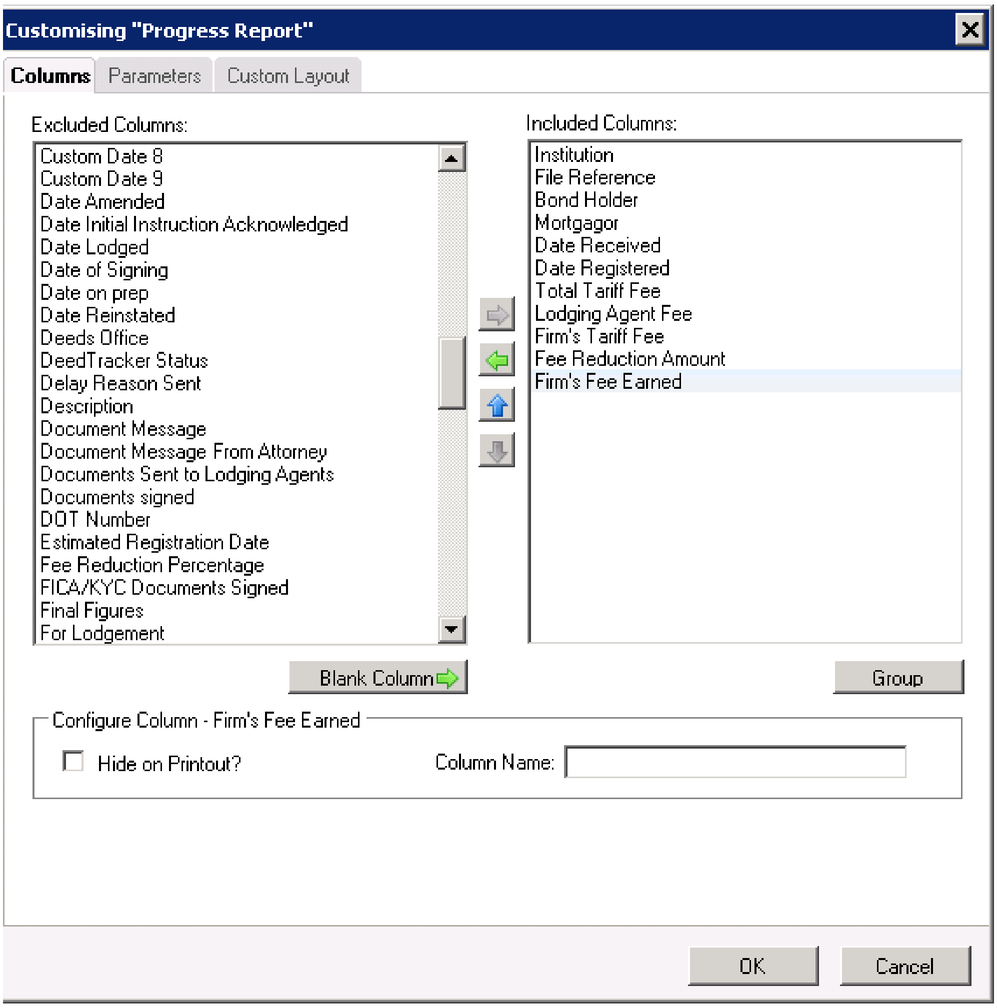


Reports

The following Financial fields have been made available to all Bonds, Transfers, Consent and Developments reports.

- Total Tariff Fee
- Lodging Agent Fee (All except Developments)
- Firm's Tariff Fee
  - Calculated: Total Tariff – Lodging Agent Fee
- Fee Reduction
- Firm's Fee Earned (All except Developments Reports)
  - Calculated: Firms Tariff Fee – Fee reduction

Now you can easily view your financials for all your matters.



Technical

Out of Memory Improvements

Fixed various Out of Memory issues specifically to the use of documents in the system.

Templates Migration to the Data Base Phase 3

Addressed the major vulnerabilities with the Templates Migration to the database.

Maintenance

Issue Code	Description
GCDev-112285	Adding/Editing simuls gives operation timeout
GCDev-112407	Fixed Milestone email activity email BCC copied to recipient/To
GCDev-112398	Fixed ERD failing when the ERD is set to auto-send and when an instruction is accepted.
GCDev-112410	Fix for issue causing duplicate matters to be created when duplicate MT27s are received

GCDev-112115	Fixed the object reference error when accepting an ABSA electronic instruction.
GCDev-112376	Fixed issue where the user is unable to validate and save a sectional transfer with Scheme name longer than 50 characters
GCDev-112375	Fixed Incorrect party type mapped from ABSA instruction
GCDev-112373	Fixed issue not being able to change Absa MT71 address line 4
GCDev-112347	Fixed Bond: Sectional Title Held Under Clause
GCDev-112330	Fixed issue when Eskom Initial bond instruction (27) does not process after Cost inquiry (63)
GCDev-112306	Fixed Object reference error when assembling documents with no conveyancers selected
GCDev-112305	Fixed Date of Registration of Transfer missing from concept library for Shared Correspondence Templates
GCDev-112290	Fixed Appearer not displaying on Bond Document
GCDev-112272	Deleted Conveyancers are no longer added to print list documents when they are inactive
GCDev-112271	Fixed Estate Agency saving without a name
GCDev-112270	Fixed ‘No default deeds office was found’ error when creating a Correspondent matter
GCDev-112261	Fixed Rodel Password column length resulting in the error "String or binary data truncated"
GCDev-112260	Fixed toolstrip buttons on transfers created from a Master that are not enabled correctly
GCDev-112251	Fixed Our ref filters on out of matter chats and chat notifications
GCDev-112232	Fixed Deeds office fee not calculating correctly when Purchase price VAT excluded is selected
GCDev-112215	Fixed clearing of Due Dates in the Milestone Configuration
GCDev-112155	Fixed not being able to send attached documents to a recipient the attached documents tab
GCDev-112147	Fixed deleted Our References being displayed in the Our Reference filter on the matter list