

# Lexis Convey v18.0.0

## Release Notes

2021/03/02

# TABLE OF CONTENTS

Albaraka – Authority to Pay .....	2
Matter Milestone Pane Improvements .....	3
New Mortgage Originator and Consultants for Correspondence .....	4
Quick Access to Fill Points.....	7
New Criteria Builder for Accounts and Print List Documents.....	7
New Data Management Tools .....	8
New Smart Dropdown Lists .....	9
Sequence Account Items According to Setup Sequence .....	11
New Transfers Final Accounts Status Report.....	11
Affordable Housing and Subsidy Housing Transfer Improvements.....	13
Additional Township Planning Acts .....	13
Reports.....	14
Batch Printing for Transfers .....	15
Consent Module Improvements .....	15
New Lodging Attorney Details .....	15
New Financial Tab .....	17
Reports.....	19
Technical .....	20
Out of Memory Improvements.....	20
Templates Migration to the Data Base Phase 3.....	20
Maintenance .....	20

# Albaraka – Authority to Pay

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

**[New Pay Authority]**

New Delete Move up Move down

Totals

Capital Amount:	834234.34	Payments on Registration:	0.00
Payable on Registration:	0.00	Total Retained:	0.00
Proforma Costs:	835708.04	Total Guaranteed:	0.00
		Balance Available:	0.00

Payment Type: Amount to be paid on registration

Credit Account:

Payee Name: \*

Payee Credit Account Name:

Bank Name:

Payee Bank Address:

Credit Account Number: \*

ACB Code: \*

Payee Credit Account Domicile:

Payable at (Town or Branch):

Amount:

Interest variation?

Guarantee Required?

Conditions for Payment:

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.

Authority to Pay

Action

**Authority to Pay**

Authority to Pay Sent: 2021/01/27

Reason: Authority to Pay

Action Cancel

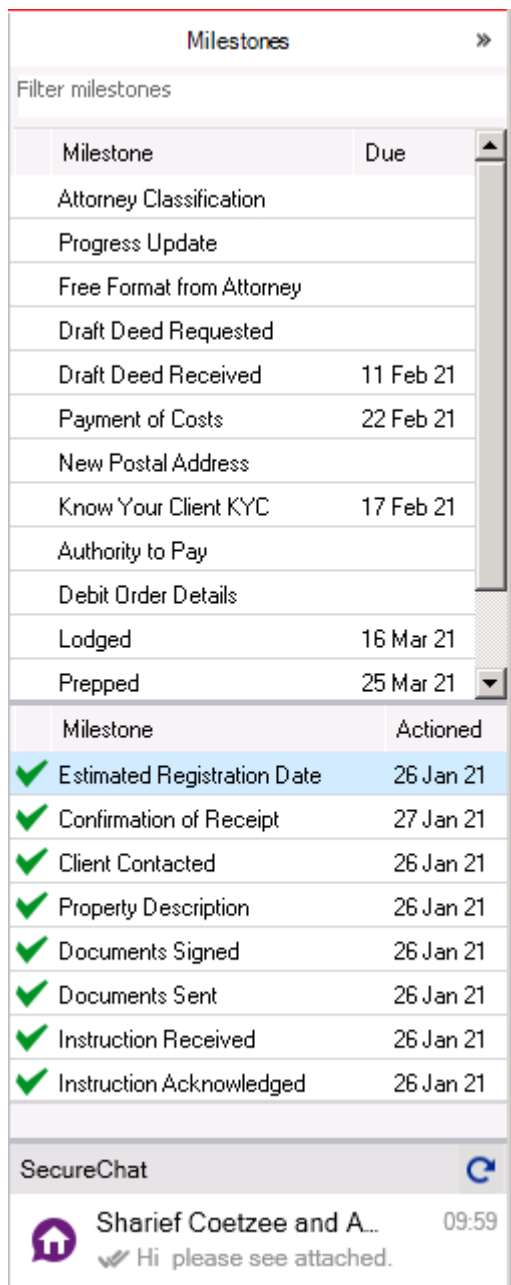
Description
guarantee
Covering Letter with Guarantees
Guarantee: Zethu Test Firm

## 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.



The screenshot shows a 'Milestones' panel with a 'Filter milestones' section. Below this is a table of milestones with columns for 'Milestone' and 'Due'. The milestones listed are: Attorney Classification, Progress Update, Free Format from Attorney, Draft Deed Requested, Draft Deed Received (11 Feb 21), Payment of Costs (22 Feb 21), New Postal Address, Know Your Client KYC (17 Feb 21), Authority to Pay, Debit Order Details, Lodged (16 Mar 21), and Prepped (25 Mar 21). Below this table is another table with columns for 'Milestone' and 'Actioned', showing a list of completed milestones with green checkmarks: Estimated Registration Date (26 Jan 21), Confirmation of Receipt (27 Jan 21), Client Contacted (26 Jan 21), Property Description (26 Jan 21), Documents Signed (26 Jan 21), Documents Sent (26 Jan 21), Instruction Received (26 Jan 21), and Instruction Acknowledged (26 Jan 21). At the bottom of the panel is a 'SecureChat' section with a refresh icon and a message from 'Sharief Coetzee and A...' at 09:59: 'Hi please see attached.'

## 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.

The screenshot shows a software interface for managing Mortgage Originators. On the left is a navigation menu with categories like 'Firm Settings', 'Users', 'My Settings', and 'Common'. Under 'Common', 'Mortgage Originators (10)' is expanded, showing a list of originators including 'Harold Green'. The main content area is titled 'Harold Green' and contains a table of consultants. The table has columns for Name, Address, Cell Number, and Email Address. One consultant, 'Peter Blake', is listed. Below the table is a 'Mortgage Originator Consultant Details' form with fields for Name (Peter Blake), Cell Number (0025551414), Address, Afrikaans Address, and Email Address.

Name	Address	Cell Number	Email Address
<i>filter text</i>	<i>filter text</i>	<i>filter text</i>	<i>filter text</i>
Peter Blake			

Mortgage Originator Consultant Details

Name:  Cell Number:

Address:

Afrikaans Address:

Email Address:

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

**Add new Send email activity**

Description: \* Confirmation of Payment

Prescribed:  Not Applicable:

Activity type: SendEmail Hidden milestone action: \*

Email subject: Bond Payment of Costs

Email template: \* Email Template Mandatory: \*

Correspondence recipient roles:

- Bank Contact
- Cancellation Attorney
- Estate Agency
- Estate Agent
- Institution holding Title Deed
- Lodging Attorney
- Manager
- Matter Owner
- Mortgage Originator
- Mortgage Originator Consultant
- Mortgagor
- Transferring Attorney

OK Cancel

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.

Mortgage Originator

Mortgage Originator: Harold Green

Mortgage Originator Consultants: New Edit Delete

Name	MD Reference	Cell Number	Email Address

**Add Mortgage Originator Consultant**

Mortgage Originator Consultant: \* Peter Blake

MD Reference:

Cell Number:

Email Address:

OK Cancel

Mortgage Originator

Mortgage Originator: Harold Green

Mortgage Originator Consultants:

Name	MO Reference	Cell Number	Email Address
Peter Blake	ESSDP/KADIR	0825551414	peterb@hg.com

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

**Customising "Status Report (All Bonds)"**

Columns Parameters Custom Layout

Excluded Columns:

- Lodgement Pro Forma
- Lodgement Registered Documents Sent
- Lodgement Registration Documents Receive
- Lodgement Undo Registration
- Lodgement Withdrawn Acknowledged
- Lodging Agent Fee
- Lodging Agent Fee Percentage
- Lodging Attorney Email Address
- Lodging Attorney Full Name
- Lodging Attorney Name
- Mandate Status
- Manual Registration
- Matter instructed through Korbitec Gateway
- Matter Reopened
- Matter State
- MO Consultant Cell
- MO Consultant Email
- MO Consultant Name
- Mortgage Originator
- Mortgagor Appointment Date
- Mortgagor Contacted
- Mortgagor Type

Included Columns:

- Bond Code
- Sort Name
- Loan Account Number
- Short Property Description
- Institution Code
- Date Received
- Date Lodged
- Date Registered
- Remarks

Blank Column

Configure Column

Hide on Printout? Column Name:

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

**Report List** Status Report (All Bonds) Bonds Lodged Report - Selected Institution Bonds per Mortgage Originator Consultant Report

Run report Delete Import Export Schedule Classic Reports Exception Reports

Description

bond

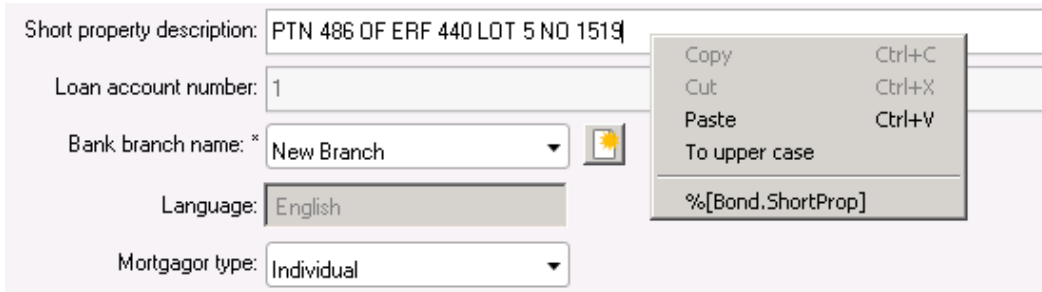
**Bond (14 items)**

- Bonds Lodged Report - Selected Institution
- Bonds On Prep Report - Selected Institution
- Bonds Outstanding for 120 days
- Bonds per Mortgage Originator Consultant Report**
- Bonds Registered Report - Selected Institution
- Correspondence Bonds

## Quick Access to Fill Points

Your fill points are now at your fingertips.

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

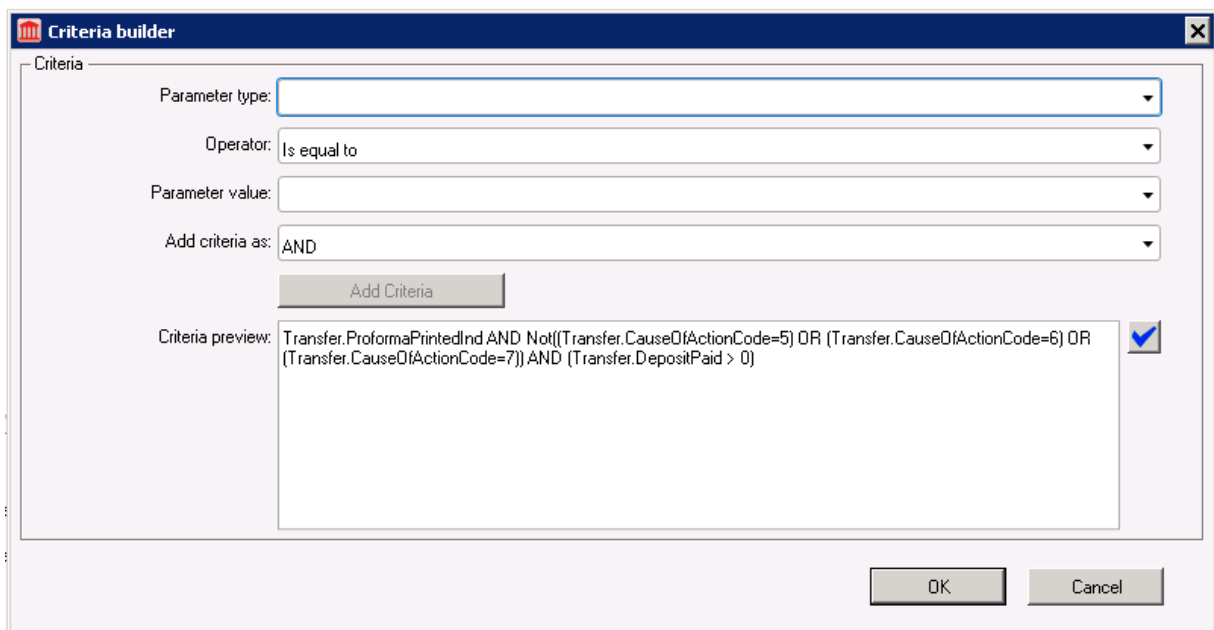


A screenshot of a web form with several input fields. A right-click context menu is open over the 'Short property description' field. The form fields are: 'Short property description' (text input with 'PTN 486 OF ERF 440 LOT 5 NO 1519'), 'Loan account number' (text input with '1'), 'Bank branch name' (dropdown menu with 'New Branch'), 'Language' (dropdown menu with 'English'), and 'Mortgagor type' (dropdown menu with 'Individual'). The context menu contains the following options: 'Copy' (Ctrl+C), 'Cut' (Ctrl+X), 'Paste' (Ctrl+V), 'To upper case', and '%[Bond.ShortProp]'.

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.



A screenshot of the 'Criteria builder' dialog box. The dialog has a title bar with a close button. The main area is titled 'Criteria' and contains the following fields: 'Parameter type' (empty dropdown), 'Operator' (dropdown with 'Is equal to'), 'Parameter value' (empty dropdown), and 'Add criteria as' (dropdown with 'AND'). Below these fields is an 'Add Criteria' button. At the bottom, there is a 'Criteria preview' section with a text area containing the following criteria: 'Transfer.ProformaPrintedInd AND Not((Transfer.CauseOfActionCode=5) OR (Transfer.CauseOfActionCode=6) OR (Transfer.CauseOfActionCode=7)) AND (Transfer.DepositPaid > 0)'. A blue checkmark is visible to the right of the preview text. At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

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.

Criteria builder

Criteria

Parameter type: Party Type

Operator: Is equal to

Parameter value: Natural

Add criteria as: AND

Add Criteria

Criteria preview: Transfer.ProformaPrintedInd AND Not((Transfer.CauseOfActionCode=5) OR (Transfer.CauseOfActionCode=6) OR (Transfer.CauseOfActionCode=7)) AND (Transfer.DepositPaid > 0) AND IfTrue (Transfer.ContainsNaturalParty,True,False)

OK Cancel

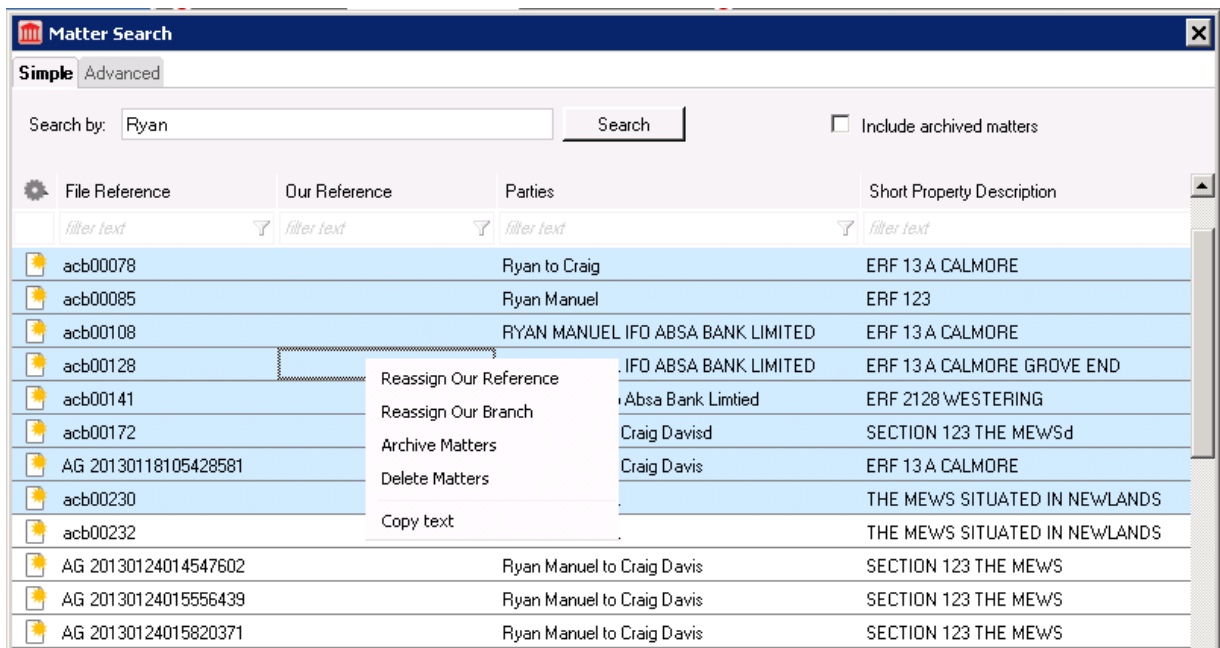
Using the Criteria Builder gives you more control and customisation of your matters.

## 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

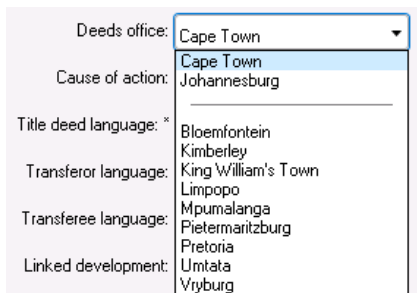


You are now able to multi-select matters from within the Matter Search dialog and perform bulk actions to Reassign Our References, Reassign Our Branches, Archive and Delete matters.

## 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

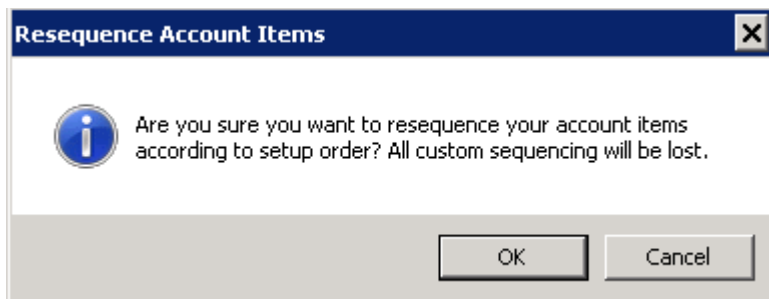
## Create New Matter:

- 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.

Transferee										
New	Edit	Delete	Update Account	Reset to Default	Resequence Account	Hide	Discount	Balance	↑ Move up	↓ Move down
Pro forma printed: <input checked="" type="checkbox"/>										
Trust account: ABSA BANK LIMITED										
BEE discount applies: <input type="checkbox"/>										
Narration	Debit	Credit	VAT	Total	Balance					
<i>filter text</i>	<i>filter text</i>	<i>filter text</i>	<i>filter text</i>	<i>filter text</i>	<i>filter text</i>	<i>filter text</i>				
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'.

Report List						
Run report	Delete	Import	Export	Schedule	Classic Reports	Exception Reports
Description	Type	Matter Type				
transfers	<i>filter text</i>	<i>filter text</i>				
[-] Transfer (3 items)						
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.

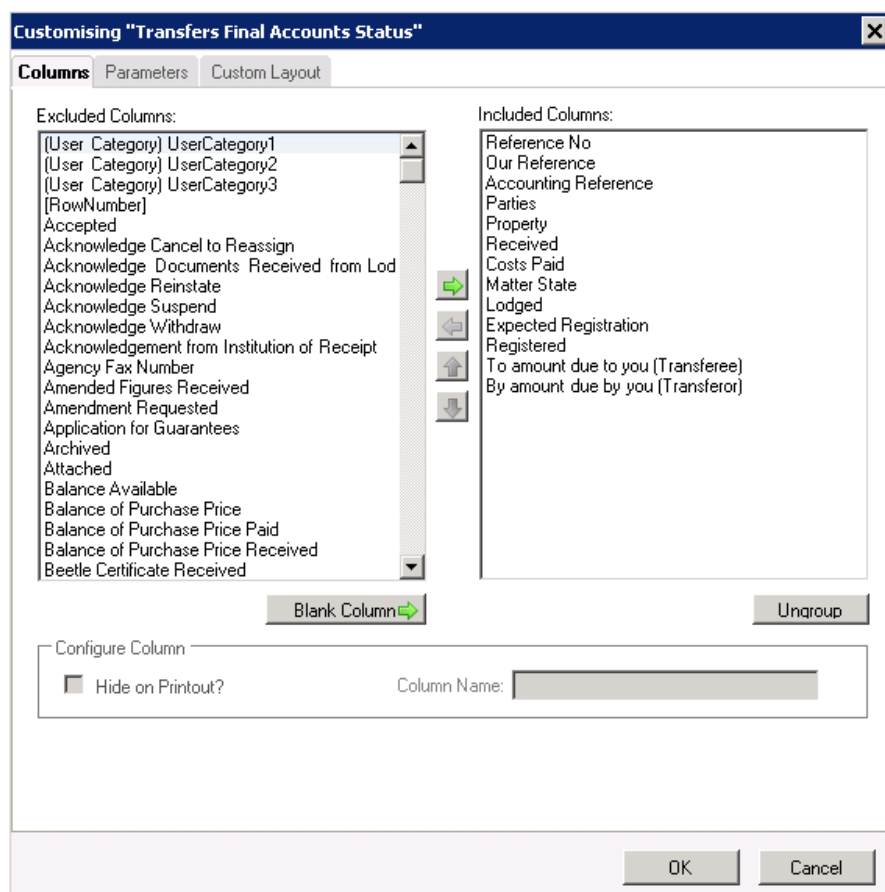
Running this report will give you a clear indication on the status of your final account and indicate any shortfalls that needs to be recovered.

Report List Transfers Final Accounts Status									
Refresh   Customise...   Save As...   Export   Preview									
	Received	Costs Paid	Matter State	Lodged	Expected...	Registered	To amount due to you...	By amount due by you...	
	<input type="text" value="filter text"/>	<input type="text" value="filter text"/>	<input type="text" value="filter text"/>	<input type="text" value="filter text"/>	<input type="text" value="filter text"/>	<input type="text" value="filter text"/>	<input type="text" value="filter text"/>	<input type="text" value="filter text"/>	<input type="text" value="filter text"/>
skruin	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	
5 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).

Affordable Housing transfer?

Township Planning Act: \* Less Formal Township Establishment No 113 of 1991 LFTE/Form DDD ▾

Title deed language: \* Less Formal Township Establishment No 113 of 1991 LFTE/Form DDD

Transferor language: Upgrading of Land Tenure Rights No 112 of 1991 LFTE/Form DDD  
Land Use Planning Ordinance No 15 of 1985 LUPO/Form E  
Townships Ordinance No 9 of 1969 LUPO/Form E

Transferee language: Planning and Development No 3 of 2003 LUPO/Form E  
Transvaal Town Planning and Townships Ordinance No 15 of 1986 LUPO/Form E

Linked development: KwaZulu-Natal Planning and Development Act No 6 of 2008 LUPO/Form E  
Northern Cape Planning and Development Act 7 of 1998 LFTE/Form DDD  
Western Cape Land Use Planning Act, 2014 LFTE/Form DDD  
Kwazulu-Natal Town Planning Ordinance No 27/1949 LFTE/Form DDD

Conveyancer: 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

Appearer: 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

Conveyancers for PA: 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 (A  
Section 10(A) of the Housing Act No. 107/1997 in favour of the Western Cape Provincial Government L

## 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)

Customising "All transfers Report"

Columns Parameters Custom Layout

Excluded Columns:

- Lodgement Matter Lodged
- Lodgement Matter Registered
- Lodgement Matter Reinstated
- Lodgement Matter Rejected
- Lodgement Matter Up for Prep
- Lodgement Matter Withdrawn from Deeds Of
- Lodgement Not Lodged
- Lodgement Pro Forma
- Lodgement Registered Documents Sent
- Lodgement Registration Documents Receive
- Lodgement Undo Registration
- Lodgement Withdrawn Acknowledged
- Lodging Agent's Fee
- Lodging Agent Fee Percentage
- Lodging Attorney
- Lodging Attorney Contact
- Lodging Attorney Email
- Manual Registration
- Matter instructed through Korbitec Gateway
- Matter Reopened
- Matter State
- Mortgagor Contacted

Included Columns:

- Reference No
- Our Reference
- Parties
- Property
- Received
- Seller Signed Documents
- Purchaser Signed Documents
- Transfer Duty Receipt Received
- Rates Certificate Received
- Levy Certificate Received
- HOA Certificate Received
- Susp. Conditions Received
- Deposit Received
- Costs Paid
- Township Planning Act
- Township Planning Act Grouping
- Milestone Process

Blank Column

Group

Configure Column - Milestone Process

Hide on Printout? Column Name:

OK Cancel

## 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.

Batch Print for Transfers

Filter by master transfer: Affordable Housing Master ( City of Cape Town )

Select All Transfers

FileReference	Parties	Erf No.	Property Description
<input type="checkbox"/> 201512290820	City of Cape Town	1010	ERF 1010.AGGENEYS
<input type="checkbox"/> 201601070158	City of Cape Town		ERF 967 YZERFONTEIN
<input type="checkbox"/> AAHH11	City of Cape Town	87	Erf 4697 Reg Dic IGWesy...
<input type="checkbox"/> AAHH12	City of Cape Town	87	Erf 4698 Reg Dic IGWesy...
<input type="checkbox"/> AAHH13	City of Cape Town	87	Erf 4699 Reg Dic IGWesy...
<input type="checkbox"/> AAHH14	City of Cape Town	87	Erf 4700 Reg Dic IGWesy...
<input type="checkbox"/> AAHH15	City of Cape Town	87	Erf 4701 Reg Dic IGWesy...
<input type="checkbox"/> AAHH16	City of Cape Town	87	Erf 4702 Reg Dic IGWesy...
<input type="checkbox"/> AAHH17	City of Cape Town	87	Erf 4703 Reg Dic IGWesy...
<input type="checkbox"/> AAHH18	City of Cape Town	87	Erf 4704 Reg Dic IGWesy...
<input type="checkbox"/> AAHH19	City of Cape Town	87	Erf 4705 Reg Dic IGWesy...
<input type="checkbox"/> AG 20180725110838283	to Avile Tom, Asi Nkata	87	ERF 87 OTTERY
<input type="checkbox"/> ASD	City of Cape Town	87	ERF 87 OTTERY
<input type="checkbox"/> RefL	City of Cape Town	87	ERF 87 OTTERY

0 of 14 transfers selected

Select All Documents

Document Name

Affordable Housing (4 items)

- Deed of Transfer
- Power of Attorney
- Datasheet for SARS
- Lodgement Cover

0 of 4 documents selected

Preview Print Cancel

## 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.



**Consent Details**

**Matter details**

Instructed by: FNB Commercial Property Finance

Matter type: Consent

Our branch: \* Bellville - Linda

File reference: \* acb00550

Date received: 2021/01/26

Parties: Chandre Andrews

Deeds Office: Kimberley

Language of matter: English

Your reference:

Our reference: \* AdHoc

Accounting reference:

Expected registration date:  2021/01/29

Short property description: ERF 1800 KUILS RIVER

DO tracking number:  DOTS

DeedTracker Status:

**Consent details**

Consenter: \* FNB Commercial Property Finance

ACB Code: 2345

Consent type: Release of property

Transferring attorney:

Bond attorney:

Cancellation branch: New branch

Loan account number: 987

Property type: \* Conventional

Moveable property?

**Lodging firm details**

Firm name: BJ VAN DER WALT & SCHOEMAN

Tel number: 0214618613

Contact person:

Email address: no-reply@lexisnexis.co.za

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.

Simuls				
Edit simuls		Print simuls		
No in Batch	Linked Matter Type	Parties	Lodging Attorney	Locker Number
0		Chandre Andrews	BJ VAN DER WALT & SCHOEMAN	

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

Deed Office	
Lodged	Action
On Prep	Action
Hand in for Registration	Action
Registered	Action
Lodging Attorney Milestone	
<input checked="" type="checkbox"/> <b>Lodgement Initial Instruction</b> <small>28 Jan 21</small>	Action
Lodgement Amendment Instruction	Action
Lodgement Instruction Withdrawn	Action
Lodgement Matter Reinstated	Action
Lodgement Free Format from Instructing Attorney	Action
Lodgement Document from Instructing Attorney	Action
Lodgement Matter Lodged	
Lodgement DOTS Number Received	
Lodgement Matter Up for Prep	
Lodgement Instruction to Register	Action
Lodgement Matter Registered	
Lodgement Registration Documents Received	Action

## 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.

**Consent - acb00550 - Release of property (Accepted)**

Save | Print | **Email** | SMS | Anytime Milestones | Send/Receive | Lexis WinDeed | Lexis Tracker | Accounting | Import bond to consent

- Milestone Summary
- Consent Details
  - Correspondence
  - Mortgagors (1)
    - Julian Hovenger
  - Properties (1)
    - ERF 1800 KUILS RIVER
  - Existing Bonds (1)
    - (Bond No: )
- Financial**
- Accounts
- Simuls
- Messages
- Matter Comments
- Attached Documents
- Matter History

**Financial**

Fees

Total Tariff Fee:	2600.00	<input type="button" value="⊕"/>
Lodging agent's fee (15.00%):	0.00	<input type="button" value="⊕"/>
Firm's Tariff Fee:	2600.00	<input type="button" value="⊕"/>
Fee reduction amount:		<input type="button" value="⊕"/>
Firm's fee earned:	2600.00	

Discharge Figures

Discharge Figures: 0.00  Penalty interest applies

Preview:

Interest Details

Interest Details:

Type	Plus/Minus	Rate	Amount	Start Date	End Date

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.

The screenshot shows a 'Fees' configuration window with the following fields and values:

- Total Tariff Fee: 2600.00
- Lodging agent's fee (15.00%): 0.00
- Firm's Tariff Fee: 2600.00
- Fee reduction amount: % [Consent.FeeReductionAmount]
- Firm's fee earned: 2600.00

Setup > Account Items > Consents

The screenshot shows the 'Consent' setup window. The top section is a list of items with columns for Source and Description. The 'Fee Reduction' item is selected. The bottom section shows the configuration for this item:

- General:**
  - Description: Fee Reduction
  - Code: FEERED
  - Nature: Fee
  - Amount (excl. VAT): -Consent.FeeReductionAmount
  - Vatable:
  - Ad hoc account item?:
  - Criteria: IfTrue(Consent.FeeReduction=0,False,True)
- Narrations:**
  - Narration Debit (Eng): %IfTrue(Consent.FeeReduction>0,"By reduction";"To increase") in fees b
  - Narration Debit (Afr): %IfTrue(Consent.FeeReduction>0,"Per verminderling";"Aan verhoging") in

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

Interest Details:

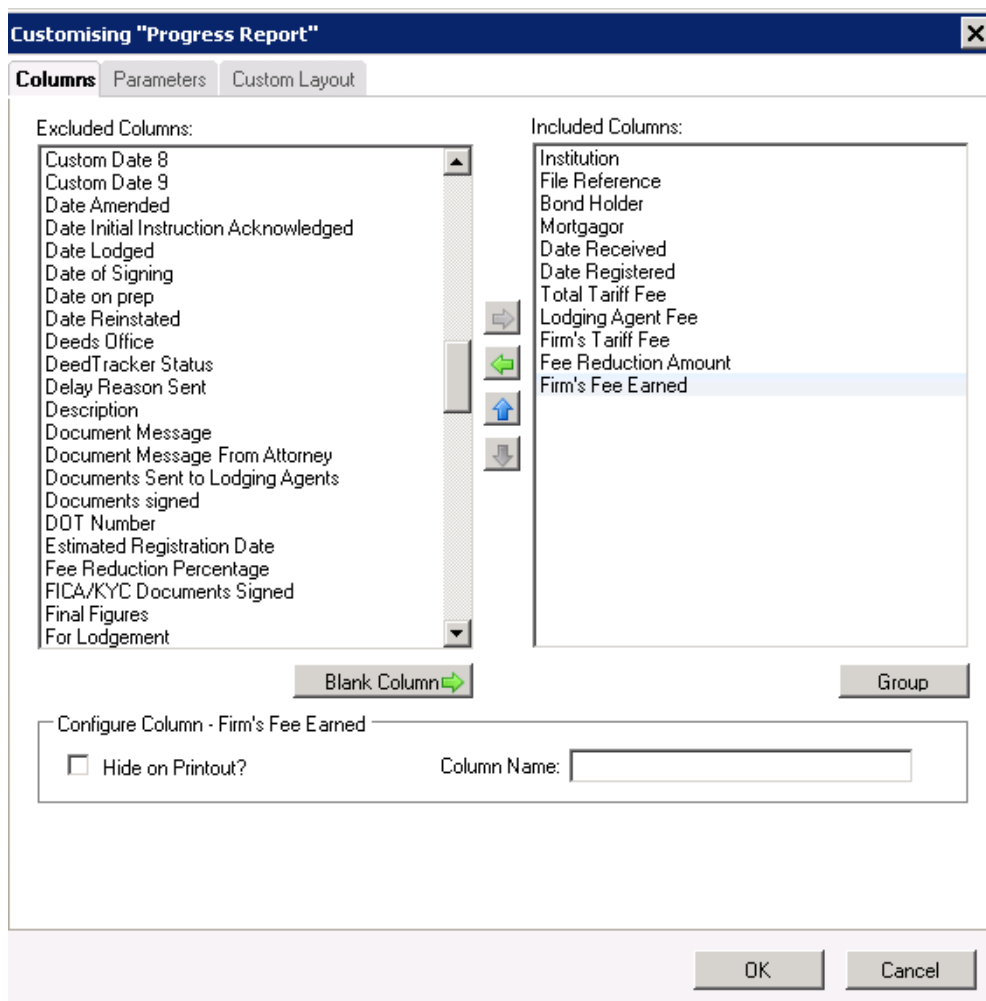
Type	Plus/Minus	Rate	Amount	Start Date	End Date
Simple	Plus	5.00	20000.00	2021/01/28	2021/02/28

## 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 toolbar 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