

# Lexis Convey v18.0.9

## Release Notes

2021/08/05

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## Uplifting the Retention Amount for FNB HL and FNB Wealth



Lexis Convey has increased the visibility of the Retention Amount field on the Financial Tab for FNB HL and FNB Wealth bonds.

An '(Uplift Retention Amount)' reminder note as well as a new warning validation icon has been added to the 'Retention Amount' field when the 'Principal Amount' equals the 'Guarantees Limited To' amount, where the Retention amount needs to be uplifted on the bond before documents are signed.


**Bond - MR I ESSOP MRS A KADIR / FirstRand Bank Limited - New (Accepted)**

Save | Print | Email | SMS | Anytime Milestones | Send/Receive | Lexis WinDeed | Lexis Tracker | Accounting

**Financial**

Registered Bond Amount:	289870.00
Additional Sum:	72467.50
Total Loan Amount:	289870.00
Principal Amount:	289870.00
Future Use Amount:	12500.00
Guarantees Limited To:	289870.00
Retention:	14470.00  (Uplift Retention Amount)
Amount Payable on Registration:	
Interest Rate:	11.5

On mouse over/hover over a warning validation message will display: 'The Principal Amount equals the Guarantees Limited To Amount. Please uplift the Retention Amount for Documents Signed.'

Principal Amount:	289870.00
Future Use Amount:	12500.00
Guarantees Limited To:	289870.00
Retention:	14470.00  (Uplift Retention Amount)
Amount Payable on Registration:	
Interest Rate:	11.5
Fixed Interest?	<input type="checkbox"/>
Instalment:	3182.61


**Warning:**

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The Principal Amount equals the Guarantees Limited To Amount. Please uplift the Retention Amount before Documents Signed.

The user can now uplift the Retention by capturing 0.00 in the Retention amount field. Once uplifted the warning icon should disappear. The user will be able to capture the ATPs accordingly.

**Financial**

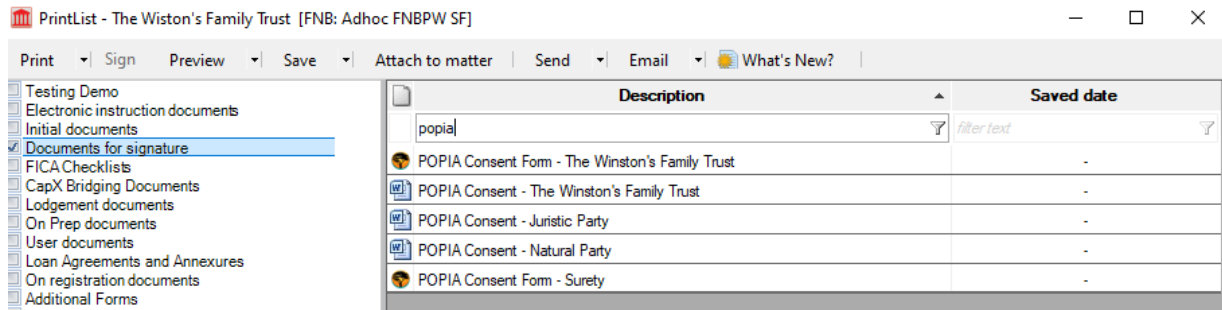
Registered Bond Amount:	289870.00
Additional Sum:	72467.50
Total Loan Amount:	289870.00
Principal Amount:	23.32
Future Use Amount:	12500.00
Guarantees Limited To:	289870.00
Retention:	0.00
Amount Payable on Registration:	289870.00 
Interest Rate:	11.5

## New POPIA Consent Form Documents

New POPIA Consent Form documents are now even available in the Print List for all matter types.

New POPIA Consent Documents for FNB Home Loans and FNB Wealth Bonds are now available.

Please refer to 'What's New?' in the Print List for more information.



## Improvements for POPIA

### Additional Auditing on a Matter

A new Matter History event will be added to the matter when the matter is viewed by the logged in user and the logged in user is not associated with the Our Reference of the matter.

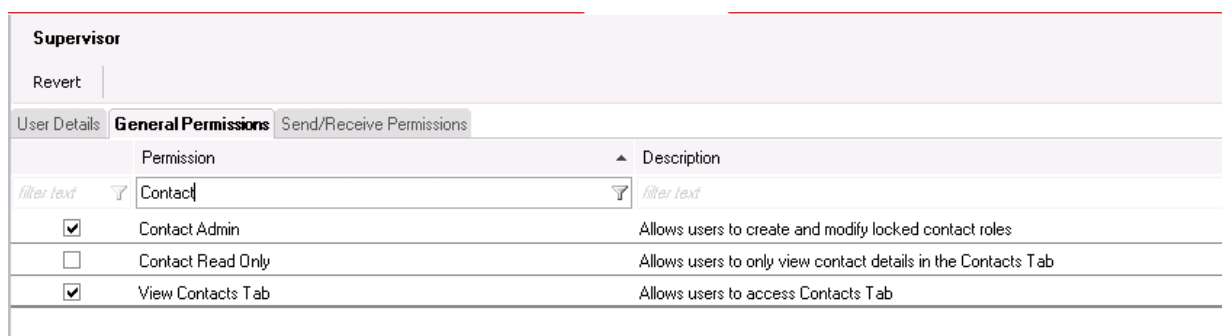
**2021/05/01 07:52 IlzeB**

Matter viewed by user IlzeB

This new Matter History event will ensure a more thorough audit trail.

### Additional Permissions for Contacts

Additional Permissions to view and edit Contacts have been added in Setup > User > Permissions.



In addition to 'Contact Admin' the new permissions are:

'View Contacts Tab' – This allows the user to view all Contacts on the Contacts tab.

'Contact Read Only' – This allows the user to only view a contact without being able to add or edit.

## Reports

The 'Seller ID' is now available for customisation on all Transfer Reports.

Customising "All transfers Report2" ✕

**Columns** Parameters Custom Layout

Excluded Columns:

- RequestAccepted
- Reset Workflow
- Scheduled Sale Date
- Section 10A Title Condition Inserted
- Section 82/113 Cert Received
- Section 82/113 Cert Requested
- Seller Cell No
- Seller Email
- Seller ID
- Seller Identified
- Seller Name
- Seller Ref
- Selling Agent Commission
- Shortfall
- Sold
- Status Documents Received Date
- Street Address
- Sub Type
- Subsidy Amount Confirmed
- Subsidy Approved
- Summary Judgment Date
- Summons Issued

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

Blank Column →
Ungroup

Configure Column

Hide on Printout?      Column Name:

OK   Cancel

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MESSAGES MATTERS **REPORTS** DIARY CONTACTS SETUP Search for matter

Report List **All transfers Report2**

Refresh | Customise... | Save As... | Export | Preview ▾

Buyer ID	Seller ID	Reference No	Our Reference	Parties	Property	Received
TRFEE ID	770707777177	SARSDec1	Transfers	PARTIES (ENGLISH)	ERF 60 BREDASDORP	2012-05-14
ID NUMBER		POAInsolvencyTransfer	AdHoc	STEVENS TRUST / CLOE...	ERF 62 JEPPESTOWN TO...	2019-07-02
990607540085	7705065010087	DeedSIESectEngA	Transfers	[Parties in English]	[Erf 123 English short sectio...	2013-06-03
990607540085	7705065010087	DeedSIEConvEngA	Transfers	[Parties in English]	[ERF 123 English short prop...	2013-05-30

## Maintenance

### Description

Property Validation Improvements for Conventional matters where the Property Type is Farm.

Matter Comments added via Milestones are now displaying in the Last Comment column in the Matter List.

SA Home Loans is now available as an Institution in Setup. Create SA HL branches in Setup to include the option in the 'Institution holding Title Deed' dropdown.

Usage analytics added for the link to Practical Guidance.

Rename CSC/Customer Support Centre to PST/Product Support Team.