# 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.

Matter	List 💎 AG456 😳							
Bor	nd - MR I ESSOF	P MRS	A KADIR / Fir	stRand Bank Lim	ited - New (Acce	oted)		
Save	e Print Er	mail	SMS Any	time Milestones 🕞	Send/Receive	Lexis WinDe	ed - Lexis Tracker -	Accounting - I
	Milestone Summary	y	Financial					
В	Bond Details	*		Registered Bond Amo	ount:	289870.00		
	respondence tgagors (1)			Additional S	Sum:	72467.50		
	lohn Smith tgagor Descriptions			Total Loan Amo	ount:	289870.00		
	ties (1) ACME Crane Hire (Pty	) Ltd.		Principal Amo	ount:	289870.00		
Pro	perties perty Descriptions			Future Use Amo	ount:	12500.00		
00 88	Financial			Guarantees Limited	d To:	289870.00		
Ē	Accounts			Reten	ntion:		(Uplift Retention Amount)	
2	Pay Authorities	*	Amou	unt Payable on Registra	ation:			
	Special Documents	×		Interest F	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:		Warning:
Interest Rate:	11.5	The Principal Amount equals the Guarantees Limited To Amount. Please uplift the Retention Amount before Documents Signed.
Fixed Interest?		
Instalment:	3182.61	

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.

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



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## 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.

m PrintList - The Wiston's Family Trust [FNB: Ac	oc FNBPW SF]		_	o x
Print 🛛 Sign Preview 🔽 Save 🔽	Attach to matter 🔰 Send 🔻 Email 💌 🌉 What's New? 🗌			
Testing Demo     Electronic instruction documents	Description		Saved date	
Initial documents	popia	7		Y
Documents for signature     FICA Checklists	SPOPIA Consent Form - The Winston's Family Trust		-	
CapX Bridging Documents	POPIA Consent - The Winston's Family Trust	-		
Lodgement documents     On Prep documents	POPIA Consent - Juristic Party		-	
User documents Loan Agreements and Annexures	POPIA Consent - Natural Party		-	
On registration documents	S POPIA Consent Form - Surety	-		
Additional Forms				

## 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.

Revert User Details General Permissions Send/Receive Permissions	
User Details General Permissions Send/Receive Permissions	
Permission   Description	
filter text 🝸 Contact 🍸 filter text	
Contact Admin Allows users to create and modify locked contact roles	
Contact Read Only Allows users to only view contact details in the Contacts Tab	
✓ View Contacts Tab Allows users to access Contacts Tab	

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:	Included Columns:	
RequestAccepted Reset Workflow Scheduled Sale Date Section 10A Title Condition Inserted Section 82/113 Cert Received Setton 82/113 Cert Requested Seller Cell No Seller Cell No Seller ID Seller ID 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	<ul> <li>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</li> </ul>	
Blank Column		Ungroup
Configure Column		
Hide on Printout?	olumn Name:	
	ОК	Cancel

Lexis®Co	onve	εγ						<u>1</u> 6	Notices - App Lir	n <u>ks</u> <del>-</del> Suj
MESSAGES		MATTERS	REPO	ORTS O DIARY		CONTACT	S SETUF		Search for matter	
Report List All tran	sfers Rep	iort2 🛞								
Refresh   Customis	se   Sav	e As   Export   Pr	eview 🔹							
Buyer ID	-	Seller ID		Reference No		Our Reference	Parties		Property	Received
	7		7		T	filter text 🌱		Y	filter text 🍸	filter text
TRFEE ID		770707777177		SARSDec1		Transfers	PARTIES (ENGLISH)		ERF 60 BREDASDORP	2012-05-14
ID NUMBER				POAInsolvenyTransfer		AdHoc	STEVENS TRUST / CLO	DE	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	2012.05.20



### 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.

