

Lexis Convey v18.1.2

Release Notes

2021/11/26

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SA Home Loans: Create New Matter from Instruction XML

A SA Home Loans Bond can now be created by importing the Instruction XML file downloaded from the bank system.

Select New Matter > Bond > SA Home Loans - new:

The screenshot displays the LexisConvey software interface. At the top left, the LexisConvey logo and version (17.3.0.402 - LEX) are visible. Below the logo, there are 'MESSAGES' and 'MAT' tabs. The 'Matter List' section is active, showing a list of existing matters. A 'New Matter' dropdown menu is open, with 'Bond' selected. Under 'Bond', 'SA Home Loans - new' is highlighted. The main window shows a list of bank-related matters, including 'ABSA Private Bank', 'ABSA Commercial Property Finance', 'Afgri Gro Capital', 'Afgri Unigro', 'Albaraka Bank Limited', 'BOE Private Bank', 'Business Partners Limited', 'Eskom Finance Company SOC Ltd', 'FNB Comm (LCS)', 'FNB Commercial Property Finance', 'FNB Housing Finance Commercial Property Finance', 'FirstRand Bank Housing Finance', 'FirstRand Bank Limited', 'FNB - Edgars', 'WesBank', 'FNB Private Clients (Lotus Notes)', 'FNB Private Wealth', 'RMB Private Bank (Wealth)', 'FNB Private Clients', 'Housing Investment Partners', 'IDC of SA Limited', 'Investec Bank Limited', 'Ithala Limited', 'Mercantile Bank Limited', 'Nedbank Business Banking Professional', 'Nedbank Limited', 'Nedbank Private Wealth', 'Nedbank Limited (Old Mutual Bank)', 'Nedbank Business Bank', 'Nedbank Limited (Peoples Bank)', 'Nedbank Property Finance', 'Peoples Bank Limited', 'RMB Private Bank (Lotus Notes)', and 'SA Home Loans - new'.

Once selected, the create new matter dialog will be displayed.

Please note, this is a manual bond and will follow the manual bond milestone process.

The screenshot shows a 'New Bond' form with the following fields and values:

- Bond Code: SAHTEST123
- Cause of action: New
- Branch: Newlands
- Milestone Process: Manual Bond
- Our reference: A Random Test
- Import XML: (empty field) [Browse]
- Property Validation:
 - Deeds Office: Cape Town
 - Property Type: Erf
 - Township: (empty field) [Township Directory]
 - Erf Number: (empty field)
 - Portion Number: 0

Buttons at the bottom: Validate, Search and import, Do this later.

Click 'Browse' next to the 'Import XML' field to add the Instruction.xml file. Once selected, follow the normal create new matter data capture screen.

The SA Home Loans Bond matter will be created using the Instruction XML file. The matter data will be populated from the Instruction XML where appropriate, reducing data capture.

The screenshot shows the 'New Bond' form with an 'XML Import' dialog box overlaid. The form fields are updated as follows:

- Bond Code: SAHLBONDTEST
- Cause of action: New
- Branch: Newlands
- Milestone Process: Manual Bond
- Our reference: A Adhoc
- Import XML: C:\Users\vughoorx\Desktop\1 SA Home Loans X [Browse]

The 'XML Import' dialog box contains the message: "The XML import was successful." with an 'OK' button.

Buttons at the bottom: Validate, Search and import, Do this later.

Bond - Barry Siphon Ndllovu / SA Home Loans - new - New (Accepted)

Save | Print | Email | SMS | Anytime Milestones | Send/Receive | Lexis WinDeed | Lexis Tracker | Rodell Bridging Finance

Bond Details

Bond code: SAHLTEST

File reference: SAHLTEST

Accounting reference:

Our reference for correspondence: A Adhoc

Milestone process: Manual Bond

Our branch: Newlands

Date received: 2021-09-21

Estimated Registration Date: 2021-10-20 No Auto recalculation of this date

Short name for sorting: Ndllovu

Short property description: Erf 7006/2 Klarinet Ext 8 Mpumalanga

Loan account number: 6401237

Bank branch name:

Language: English

Mortgagor type: Individual

Property type: Conventional

Leasehold certificate required: Certificate of Right of Leasehold

Proclamation: N/A

Deeds Registry:

Rank of bond: 1

Cause of action: New

DO tracking number: DOTS

The Print List will contain all the Lexis Convey generic Bond (BNDE) documents and will not be SA Home Loans specific. Additional documents can be added as user documents.

ABSA e-signable Participant Documents

The following ABSA documents will now be generated per Mortgagor when a Surety applies. The change excludes where the Mortgagor is a juristic entity. Absa will make these changes available on a later date TBD.

The documents affected by the change:

- Declaration of Foreign National Temp Residence
- Cession of Insurance Policy Long Term (English & Afrikaans)

These documents can be signed electronically with **Lexis Sign** as per usual.

Lexis Sign Print Group Updates

The following changes have been applied.

Nedbank

The following documents have been added to the Lexis Sign Print group for Nedbank:

- Fatca
- Life Cover Waiver Form

FNB HL and FNB Wealth

The following document have been added to the Lexis Sign Print group for FNB HL and FNB Wealth divisions:

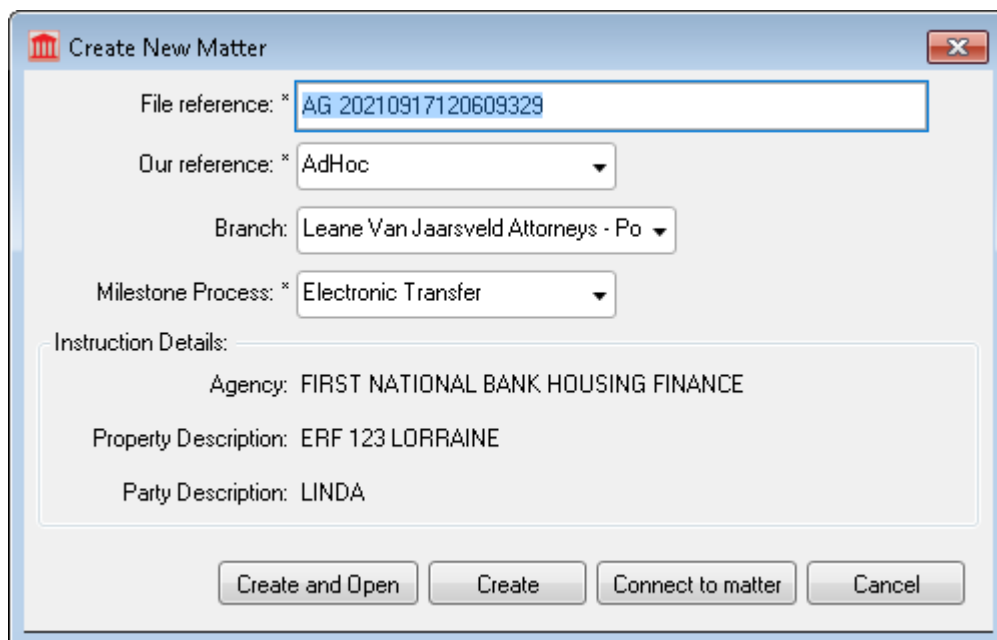
- POPIA Consent Form

The following documents have been removed from the Lexis Sign Print group for FNB HL and FNB Wealth divisions:

- Happy Letter
- Juristic Certificate

Electronic Transfers – Connect to Matter

The ‘Connect to Matter’ feature has been extended to include all electronic Transfer instructions.



The screenshot shows a 'Create New Matter' dialog box with the following fields and values:

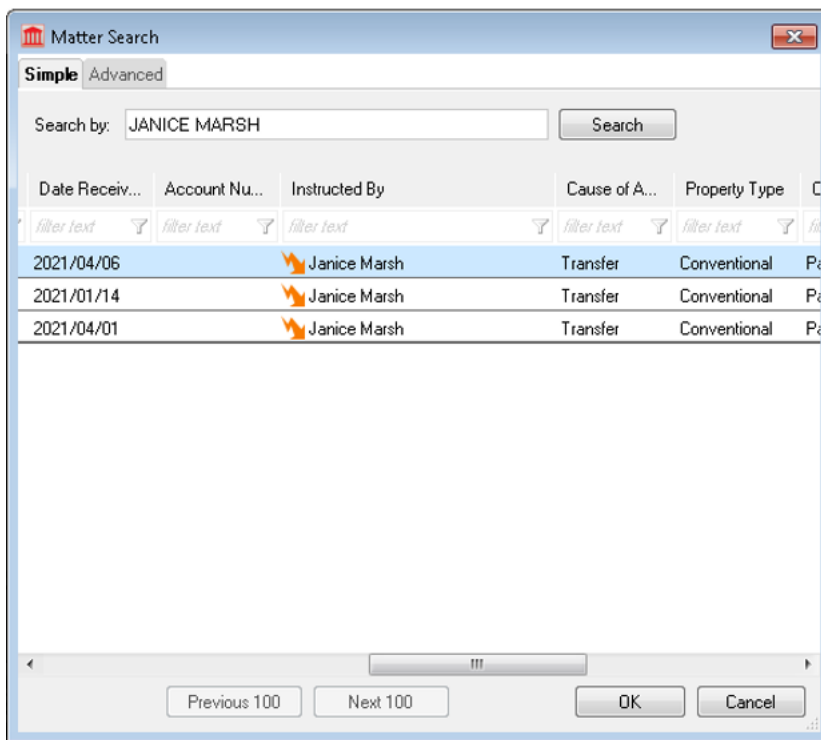
- File reference: * AG 20210917120609329
- Our reference: * AdHoc
- Branch: Leane Van Jaarsveld Attorneys - Po
- Milestone Process: * Electronic Transfer

The 'Instruction Details' section contains:

- Agency: FIRST NATIONAL BANK HOUSING FINANCE
- Property Description: ERF 123 LORRAINE
- Party Description: LINDA

At the bottom of the dialog box are four buttons: 'Create and Open', 'Create', 'Connect to matter', and 'Cancel'.

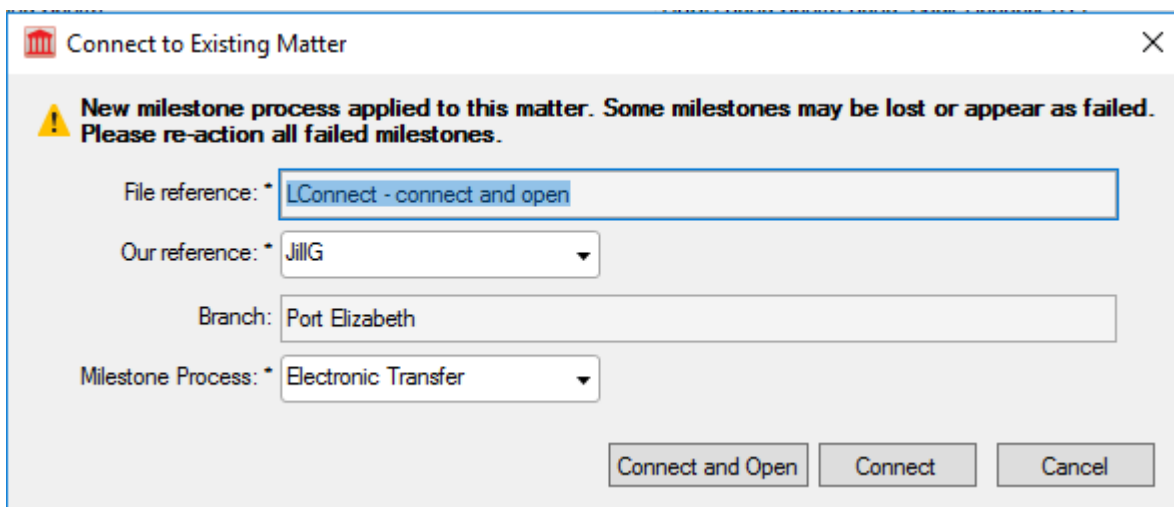
Click on the ‘Connect to matter’ button, search for the appropriate existing manual Transfer matter, select the matter and click ‘OK’.



Clicking 'Connect and Open' will create the new electronic Transfer matter.

Please note the warning message when using this feature, which states:

New milestone process applied to this matter. Some milestones may be lost or appear as failed. Please re-action all failed milestones.



The instruction and messaging process is applied to the existing matter.

The manual matter data takes preference over the instruction data. Where the manual matter data is blank, the instruction data will be populated.

All electronic transfer milestone processes become available to select and the selected electronic milestone process is applied to the matter.

Lexis Convey attempts to complete all milestones from the manual milestone process to the selected electronic transfer milestone process.

Any milestones that exist in the manual milestone process but not in the electronic transfer milestone process, will be lost.

Any milestones that have been completed but have an electronic message associated it will appear as failed. Please re-action all failed milestones.

Milestone Summary

Transfer Milestones

✓ Instruction Received 30 Sep 21	Days since instruction: 1
✓ Instruction Accepted 30 Sep 21	Estimated Registration Date 30 Sep 21

Summary

Free Format from Attorney	Action
Document from Attorney	Action
Progress Update	Action

Preliminaries

✓ Confirmation of Receipt 30 Sep 21 30 Sep 21	Action
✘ Estimated Registration Date 30 Sep 21	Action
✓ Seller Contacted 30 Sep 21 30 Sep 21	Action
✓ Purchaser Contacted 30 Sep 21 30 Sep 21	Action
! Rates Figures Received	Action

Sales Conditions

! Suspensive Conditions Met	Action
! Deposit In Order	Action
! Bond Granted	Action

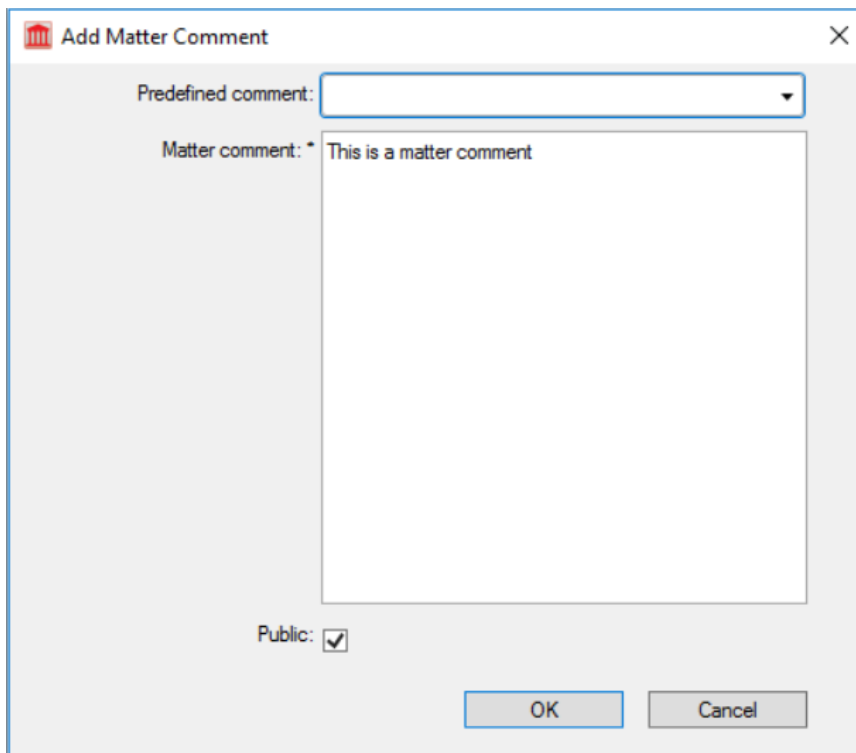
Pre-Lodgement

Lexis Tracker Change Requests

Deleting Comments from Lexis Tracker

When activated for Lexis Tracker, all comments selected as 'Public' will be shared with Lexis Tracker.

All public comments that have already been shared with Lexis Tracker will be deleted from Lexis Tracker when the 'Public' checkbox is deselected in Lexis Convey.



Technical

New Template Update Service

Lexis Convey created a Template Update Service to update Lexis DocumentAssembly documents via a web service.

Updating templates will no longer require a Lexis Convey update.

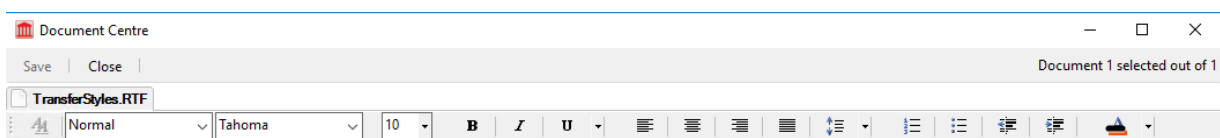
GhostDraft v5.0 Update

GhostDraft v4.5 has been updated to GhostDraft v5.0.

The GhostDraft editor used for viewing and editing .gd documents has been updated.

Document Centre has been updated:

- The format controls for the dropdowns have been updated to a more modern design.
- “Times New Roman” is no longer the default font type for all templates when editing.
- The “Underline” button icon has been updated.
- The “Line Spacing” icon is now enabled.
- The “Font Colour” icon ‘A’ now has the selected colour highlighted across the icon.
- Ctrl Z can be used for Undo
- Ctrl Y can be used for Redo.



POPIA Compliance: Encryption Standards and Data Classification

Updated Lexis Convey to be in accordance with the RELX Encryption Policy and Data Classification Compliance.

- Updated User authentication/login to prevent password compromise.
- Data encryption updated to latest high security standards.
- Updated credential management storing the following passwords to prevent password compromise:
 - Rodel Bridging Finance
 - SARS e-filing
 - WinDeed

Memory Management Improvements

Lexis Convey memory management around Matter Documents and Messaging has been improved to **reduce** 'OutOfMemoryException' errors.

Improvements were made around the following:

- Saving and viewing of attached Matter Documents and Print list Templates
- Messages and Attachments
- Compression and Encryption/Decryption of large data blobs
- Processing of Chat Attachments and Notices
- Encoding and Serialization of Message Xml

Feature Requests

Description

CAT-112529: Removed 'Married Out of Community of Property with an ANC' from the Marital Status List for all matter types.

CAT-108571: Add an option to email a RTF document as a PDF on print list.

CAT-109581- Deceased Estate Transfers - Combined Affidavits are now available in the print list for all transferors who are not deceased.

CAT-60356 - Deceased Estate Transfers – Remove Power of Attorney for Section 45(1) DRA transfers.

CAT-92127 – Deceased Estate Transfers: 'Estate Late' has been translated into 'Boedel Wyle' for the party's description.

Document Maintenance

Please refer to **What's new** on the Print List.

The following documents and print list entries have been updated:

- FNB HL:
 - POPIA Consent Form, now including Spouse of Mortgagor
 - Cession of Customer Rights to Mortgaged Property
 - Indemnity
- FNB Wealth:
 - POPIA Consent Form, now including Spouse of Mortgagor
 - Cession of Customer Rights to Mortgaged Property
 - Indemnity
- Nedbank:
 - Form 21 - Life Assurance
 - Property Insurance.gd
 - Form 23 - Life Assurance
 - Form 23 - Property Insurance

Maintenance

Description

GCDev-112557 – Fixed the Authority to Pay document not being available in the Lexis Sign Print Group.

GCDev-112556 – Fixed certain attachments that were unable to open via email.

GCDev-112547 – The 'Unassigned' Our Reference filter issue with Messages has been fixed.

GCDev-112546 – Fixed the editing of the 'First Name' field on the SARS tab for Sale and Execution Transfers when field length has reached the SARS limit.

GCDev-112545 – Fixed the multiple Secondary Loan Accounts not reflecting after an Absa amendment instruction.

GCDev-112539 – Registration number for Umastandi Proprietary Limited has been updated.

GCDev-112525 – Removed duplicate GhostDraft Bond Quotation documents for all FNB divisions.

GCDev-112512 – Creating a Transfer from a Master and Archiving on a new database has been fixed.

GCDev-112511 – Fixed the 'Documents Sent to Mortgagor' field description for bond reports.

GCDev-112506 – Fixed Milestone Comments not appearing in the 'Last Comment' column on the Matter List view.

GCDev-112505 – Increased Party Name character limit in order to process certain FNB instructions.

GCDev-112503 – Fixed Milestone User Templates not being saved to the database when the file is still in the files system.

GCDev-112478 - Consent Lodging Agent Fee being calculated incorrectly has been fixed.

GCDev-112471 - Consent Fee not calculating correctly for Existing Bonds has been fixed.

GCDev-112464 – Fixed the NameParser to parse double word names correctly.

GCDev-112410 - Improved user experience when processing duplicate instructions.

Improved user experience with auto-sending the Estimated Registration Date message for Absa.

SARS: “VDP” will now be defaulted in the ‘VDP number’ field when ‘Has VDP been applied for?’ is selected.

SARS: Passport country no longer mapped for juristic parties.

SARS: Marital Notes of Party will only be mandatory for MICOP parties.

SARS: ‘Acquisition by water serviced provider [section 9(Bb)]’ ‘Exemption type’ wording updated to ‘Acquisition by water services provider [section 9(1)(Bb)]’.

SARS: SARS field validation types updated: RegistrationNumber MaxLength, VATNumber MaxLength, VATNumber validation, Country of Residence MaxLength, Passport Number validation, TDPassportNumber length, Estate Agent Surname MaxLength, Business TelNumber MaxLength, Business TelNumber validation, Other Use Of Property MaxLength, Nature of Property validation, VDP Number MaxLength.

SARS: Additional Exemptions added.

SARS: Removed UI for fields ‘Conveyancer’ and ‘Date of signing by Conveyancer’ in Declarations group on the SARS tab.

SARS: Added Spouse details on the SARS tab for the surviving spouse for Section 45(1) Transfers.

Updated Rodel Mapping
