# Lexis Convey v18.1.18

**Release Notes** 

2022/09/13

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## Lexis Convey – Lexis KYC Integration

## Mortgagors, Parties, Transferors and Transferees Update

Lexis KYC is now integrated with Lexis Convey.

In the **Bonds** module the Mortgagors and Parties Tabs have been updated with the following Lexis KYC details:

- Lexis KYC button
- Profile Status
- Customer Reference

In the **Transfers** module the Transferors and Transferees Tabs have been updated with the following Lexis KYC details:

- Lexis KYC button
- Profile Status
- Customer Reference

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		Spouse's Identity Number:	8904190317086		
		Spouse's Date of Birth:	8/17/2022		
		Spouse Gender:			
Use	Currenting Our Def. All	Spouse dender.	• •		
User:	Supervisor <u>Our Refs: All</u>				

Clicking the **Lexis KYC** button will allow you to confirm if you wish to proceed with sending the Mortgagors / Parties / Transferors / Transferees details to Lexis KYC for verification.





Once you confirm, you will be required to login to Lexis KYC with your Lexis KYC login credentials. Information on how to register for Lexis KYC will be provided as a link on the Lexis KYC login screen.

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When you are in Lexis KYC, you will see the Mortgagors / Parties / Transferors / Transferees details that have been sent for verification.

Please add any additional information that may be required click 'Verify'.

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The Lexis KYC Verification status and Customer Reference will be displayed in Lexis Convey after Lexis KYC verification.

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## App links

Lexis KYC has been added to the App links dropdown list



Clicking on the Lexis KYC link will allow you to login to Lexis KYC.



23
Lexis® KYC Log In
● Email ○ Username Email*
user1@lexisnexis.co.za
Reset / Forgot your password?
Log In
Lexis KYC Support Team 0861 946 333 kyc.support@lexisnexis.co.za

## KZN Correspondent Conveyancing Fee 2022

The KZN Correspondent Conveyancing Fees have been updated to reflect the changes as per CIRCULAR 22 of 2022 which came into effect on 01 August 2022.

## **SARS** Integration Updates

Nature of Party Update

The "Unincorporated Body of Persons - Joint Venture not registered with CIPRO" option on the 'Nature of Party' field in the Transferors / Transferees page has been removed.



RS details	^
First Names:	Jannie SARS Limit [6/50]
Initials:	L
Sumame: *	van der Merwe
Identity number:	7302065000005
Date of birth:	2/6/1973
Gender:	Male
Share of property %:	100.00
Nature of party:	
Marital status:	Public Company - Registered with CIPC A Retirement Fund - Pension. Provident and Annuity Funds regulated by the Financial Services Board
Cell number:	Secondary Co-Operative - Registered with CIPC Sectional Title Entity - Sectional Title Schemes created and managed under the National Sectional
Income tax number:	Sole proprietor - An Individual trading under Personal Capacity
Annual income:	Special Trust - Type A - Trust Incorporated under the Trust Property Control Act No. 57 of 1988 Special Trust - Type B - Trust Incorporated under the Trust Property Control Act No. 57 of 1988
	Tertiary Co-Operative - Registered with CIPC
VAT number:	Trust - Exempt Institutions - Trust Incorporated under the Trust Property Control Act No. 57 of 1988
Country of residence:	Trust - Intervivos - Trust Incorporated under the Trust Property Control Act No. 57 of 1988 Trust - Mortis Causa - Trust Incorporated under the Trust Property Control Act No. 57 of 1988
Passport number;	Unlimited Company - Registered with CIPC
	Welfare Organization - Welfare Organisation Registered under Section 13(1) of the National Welfare
Passport country:	v
Effective date of transaction:	9/6/2022 Date sale agreement was signed
Connected to buyer:	
Marital notes:	
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ve anu Frevious	Save and Next Save and Close

#### ID Number

ID number field validation has been updated for Transferors and Transferees as follows:

- The ID Number is not required if the Passport Country of citizenship = ZAF or ZA.
- The Passport Country is not to be supplied when ID Number is provided.
- The Passport Number and Passport Country are required if Passport Country of citizenship is any other country except ZAF or ZA.

#### Passport Country

Passport Country field validation has been updated for Transferors and Transferees as follows:

- When the Passport Number is completed, the Passport Country becomes mandatory.
- If the Passport Country of citizenship = ZAF or ZA, then the ID Number becomes mandatory.
- The Passport Country must not be supplied when an ID Number is provided.
- If the Passport Country of Citizenship is any other country except ZAF or ZA, then the Passport Number and Passport Country becomes mandatory.

## FirstRand Bank Home Loans: Financial Tab

A new 'Insurance Details' field has been added below the 'Amount of Insurance' to the **Financial** page for FirstRand Bank Home Loans.



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		Fee reduction amount		BEE de	count required		
		Firm's fee earned					
		Non Prejudice Clause					
		Service Fee	5.63				
		Assessment Fee	615.60				
		Initiation Fee	199.50				
		Date of Purchase	11/27/2003				
		Purchase Price					
		Estimated Transfer Costs					
	Supervisor Our Refs: All		· _				

Clicking the 'Insurance Details' field will display the Insurance Details.

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		Fee reduction amount:			
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		Service Fee:			
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## Lexis DocAssembly (LDA) Various enhancements: New and Existing

#### Documents

The following changes have been applied.

#### Standard Bank

<sup>®</sup> LexisNexis<sup>®</sup>

The following document has been added to the Additional Forms Print group for Standard Bank

• KYC Guidelines

#### FNB Home Loans

The following document has been updated to include the 'Purchase Price' from the **Financial** Tab for FNB Home Loans:

• Confirmation by Conveyancer

#### FNB Home Loans Wealth

The following document has been updated to include the 'Purchase Price' from the **Financial** Tab for FNB Wealth:

• Confirmation by Conveyancer

#### ABSA Home Loans

A new document has been added to the **Documents for Signature** for ABSA Home Loans:

• Collateral Bond

## ABSA Home Loans MT70

#### Payment Details (70) Milestone Update

The Payment Details (70) milestone has been updated for ABSA Home Loans.

In the Financial tab, the Payment Details have been updated with the following new fields:

- Ultimate Debtor Name
- Debtor Account Holder Name
- Debtor Account Holder ID Number
- Debtor Account Holder Cell Number
- Date Adjustment Type



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## SBSA MT71

New Postal Address of Mortgagor(71) Update

The New Postal Address of Mortgagor (71) Milestone has been updated for Standard Bank Home Loans. The functionality will be hidden behind an Online setting. It will be switched on when it goes live. In the **Mortgagors** Tab, the Correspondence details have been updated with the following new fields:

- Contact Details
  - o Email
  - o Cell Phone
  - Work telephone
  - Home telephone
- Residential Address
- Postal Address
- Future Residential Address
- Future Postal Address



New Postal Address of Mor		~
Contact Details Sent:		
Contact details (please capture at		
Email.	no-reply@lexisnexis.co.za	
Cellphone number: *	0834857700	
Work Telephone:	0215566870	
Home Telephone:		
Residential address		Ξ.
Address Line 1: *	250 Main Road	
Address Line 2: *	Great Westerford	
Address Line 3: *	Rondebosch, Cape Town	
Postal code: *	7700	
Postal address		51
Address Line 1:*	250 Main Road	
Address Line 2: *	Great Westerford	
Address Line 3: *	Rondebosch, Cape Town	
Postal code: *	7700	
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Future postal address		
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Address Line 2: *	Bellville	
Address Line 3: *	Cape Town	
Postal code: *	7535	
	Copy from Future Residential	
Future residential address		
Address Line 1:*	10 Vortreeker Rad	
Address Line 2: *	Bellville	
Address Line 3: *	Cape Town	
	Trad	
Postal code: *	/535	
Postal code: *	Action Cancel	_ ~

## SBSA MT87

#### Additional Participant Details (87) Milestone Update

The Additional Participant Details (87) milestone has been updated for Standard Bank Home Loans. The functionality will be hidden behind an Online setting. It will be switched on when it goes live. In the **Mortgagors** Tab, the Correspondence Details have been updated with the following new fields:

- Cell Phone Number
- Email address
- Future Correspondence Address
- Future Residential Address

For Individual Mortgagors that are married with a spouse, a new **Spouse Correspondence Details** section has been added below the Correspondence details with the following new fields:

- Correspondence Address
- Residential Address



- Future Correspondence Address
- Future Residential Address

In the Parties Tab, the Correspondence details have been updated with the following new fields:

- Future Correspondence Address
- Future Residential Address

For **Individual Parties** that are married with a spouse, a new **Spouse Correspondence Details** section has been added below the Correspondence details with the following new fields:

- Correspondence Address
- Residential Address
- Future Correspondence Address
- Future Residential Address

Lexis® Convey				Support -
MESSAGES     MATT	ERS REPORTS 📀 D		Search for matter	۹
Matter List 📵 311258508000100010	004 💿 🌍 AGFNB Proceed to Register	SileRef WG12345 Signal LWR65858742280	0100010004 🛞	*
Bond - MR. A AZARITA AND	MR. A AAMPELIO / Standard Bar	nk Limited - New (Accepted)		
Save Print Email S	MS Anytime Milestones • Se	end/Recei <u>v</u> e • Lexis WinDeed • <u>L</u> exis Tr	acker - Accounting -	÷
Milestone Summary	ALAKSHITA AZARITA			
Bond Details *	New Delete Lexis KYC	🕈 Move up 🛛 🖊 Move down		
Correspondence	Correspondence details			^
Mortgagors (3)     ALAKSHITA AZARITA	Correspondence address:	5 SIMMONDS ST MARSHALLTOWN		
APARVANI AAMPELIO		2001		
[New Mortgagor] Mortgagor Descriptions	Residential address:	5 SIMMONDS ST		-
Parties (1)     Murray and Robert		MARSHALLTOWN 2001		
Properties (1)				- 8
ERF 958 ESHOWE Property Descriptions	Future addresses the same as above?			Milestones
Financial ¥	Future Correspondence address:			×.
Accounts				
Pay Authorities 🛛 👻	Future Residential address:			
Special Documents				
Messages	Home phone:			_
Matter Comments	Work phone:			
Attached Documents		0120530480		_
Matter History		noreply@lexisnexis.co.za		
	Spouse Correspondence details Correspondence address:			
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	Future addresses the same as above?			
	Future Correspondence address:			
	ratale conseptituence address.			
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		0837575750		-
		test@lexisnexis.co.za		=
User: Supervisor Our Refs: All				



## ABSA Home Loans MT87

#### Participant Details (87) Milestone Update

The Participant Details (87) Milestone has been updated for ABSA Home Loans. The functionality will be hidden behind an Online setting. It will be switched on when it goes live. The following field has been added to the Participant Details (87) milestone.

Cell Number

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