

# Lexis Convey v18.3.4

## Release Notes

2024/03/07

# TABLE OF CONTENTS

Lexis Convey – Currencies Direct Integration .....	2
Currencies Direct is now available for Bonds and Transfers .....	2
Maintenance .....	6

## Lexis Convey – Currencies Direct Integration

Lexis Convey is now integrated with Currencies Direct, a foreign exchange partner.

Currencies Direct are a multi-award-winning provider of foreign exchange and international payment services. They've been supporting individuals and businesses with their FX requirements since 1996, with a dedicated South African branch opening over twenty years ago.

The company is part of a group with +25 global offices, over 750 currency experts and transacts over R245bn a year in foreign exchange. They have an 'Excellent' five star rating on Trustpilot and have won MoneyAge Money Transfer Provider of the Year five times.

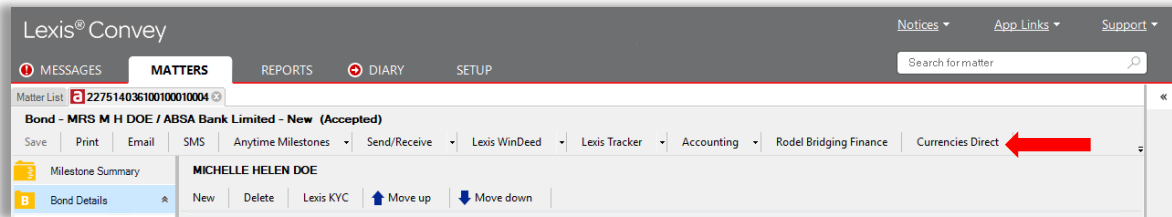
Please visit the [Currencies Direct](#) Website for more information.

## Currencies Direct is now available for Bonds and Transfers

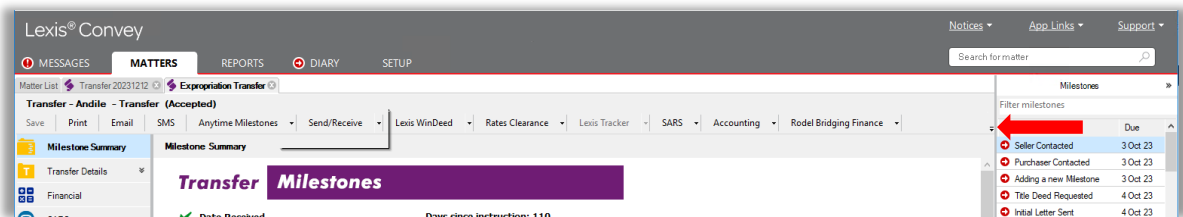
The new **Currencies Direct** button is now available on the toolbar menu for Mortgagors and Parties on Bonds and Transfers and Transferees on Transfers.

Lexis Convey Desktop:

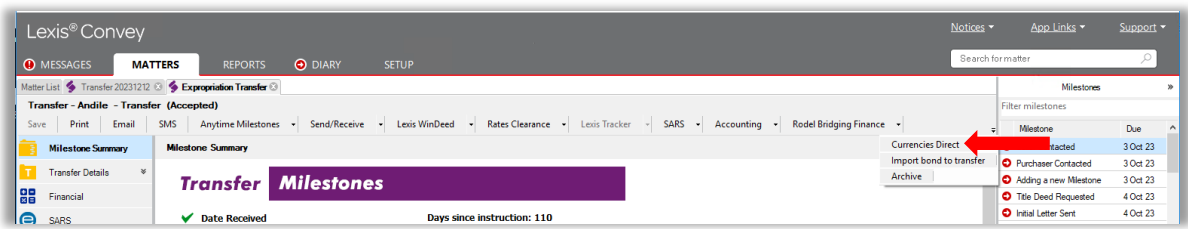
For Transfers, if the Milestones panel on the right-hand side of the screen is collapsed, the **Currencies Direct** button is visible in the toolbar menu.



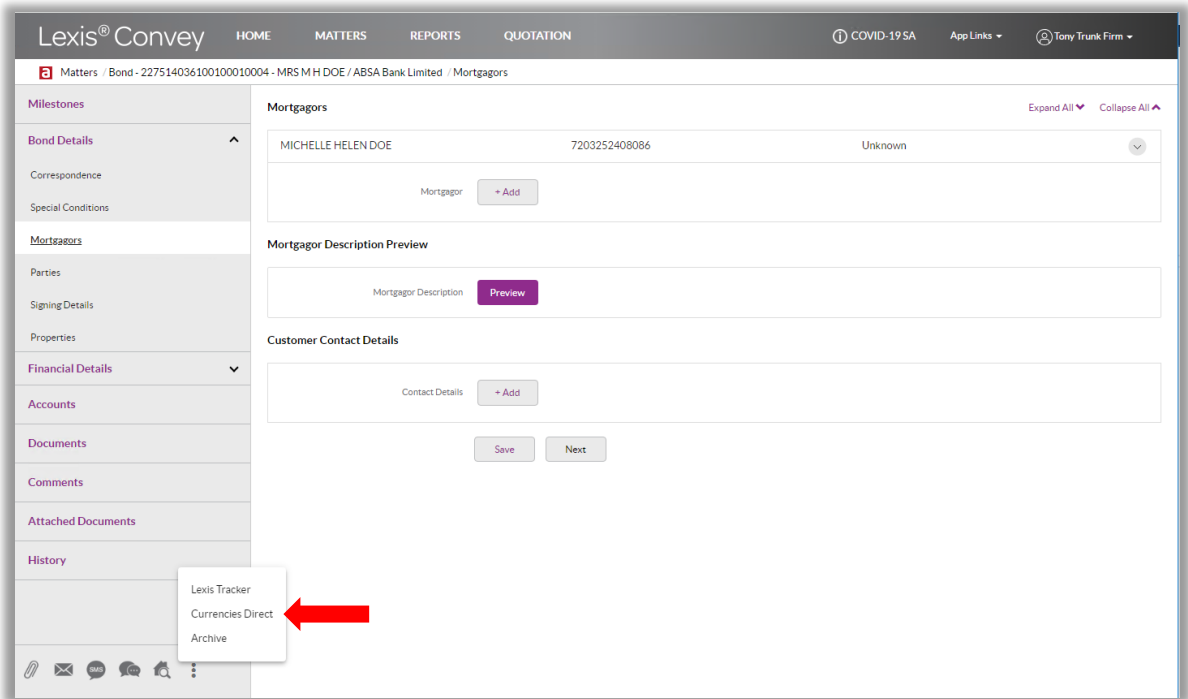
If the Milestones panel on the right-hand side of the screen is expanded, the **Currencies Direct** button might not be visible on the toolbar menu. A down facing arrow is displayed to show that there are more menu items that are hidden from the toolbar menu.



Clicking the down facing arrow displays **Currencies Direct** menu item and all the other menu items that are hidden from the toolbar menu.



Lexis Convey Online:



You can now easily send through the required information to Currencies Direct to assist in any foreign exchange related transactions.

Clicking the **Currencies Direct** button will allow you to select either the Mortgagor, Party, Transferor or Transferee details to send through to Currencies Direct.

## Lexis Convey Desktop:

The screenshot shows the Lexis Convey Desktop interface. The main window displays a matter titled "Bond - MRS M H DOE / ABSA Bank Limited - New (Accepted)". A "Currencies Direct" dialog box is open, asking for consent to send information to Currencies Direct. The dialog box contains the following fields:

- Name: MICHELLE HELEN DOE (indicated by a red arrow)
- Surname: DOE
- First names: MICHELLE HELEN
- Home phone: 0102548985
- Cell phone: 0839157746
- Email address: mmi.doe@gmail.com

Below the fields, there is a checkbox for "Customer has given consent that the above information can be sent to Currencies Direct." and a link to "Please see Currencies Direct Privacy Policy." The dialog box also includes "OK" and "Cancel" buttons.

## Lexis Convey Online:

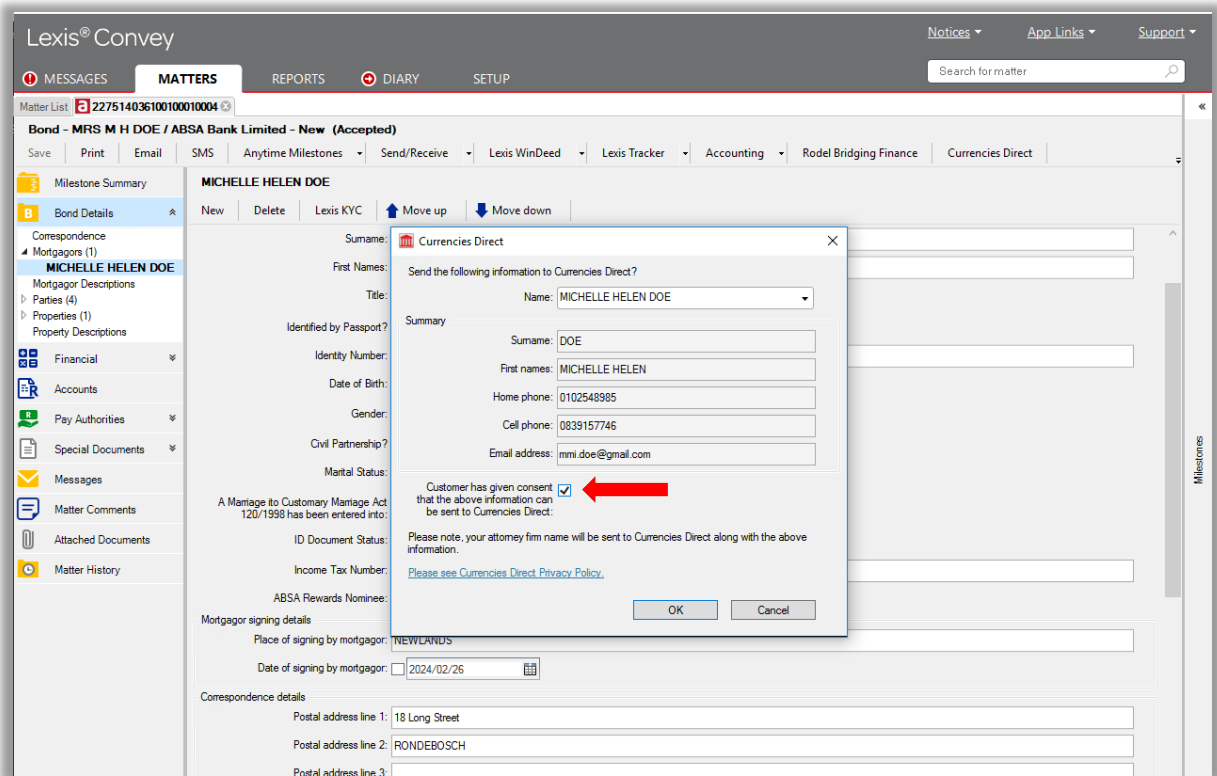
The screenshot shows the Lexis Convey Online interface. The main window displays a matter titled "Matters Bond - 22751403610010004 - MRS M H DOE / ABSA Bank Limited - New (Accepted)". A "Currencies Direct" dialog box is open, asking for consent to send information to Currencies Direct. The dialog box contains the following fields:

- Name: MICHELLE HELEN DOE (indicated by a red arrow)
- Surname: DOE
- First Names: MICHELLE HELEN
- Email Address: mmi.doe@gmail.com
- Cell Number: 0839157746
- Home Phone: 0102548985

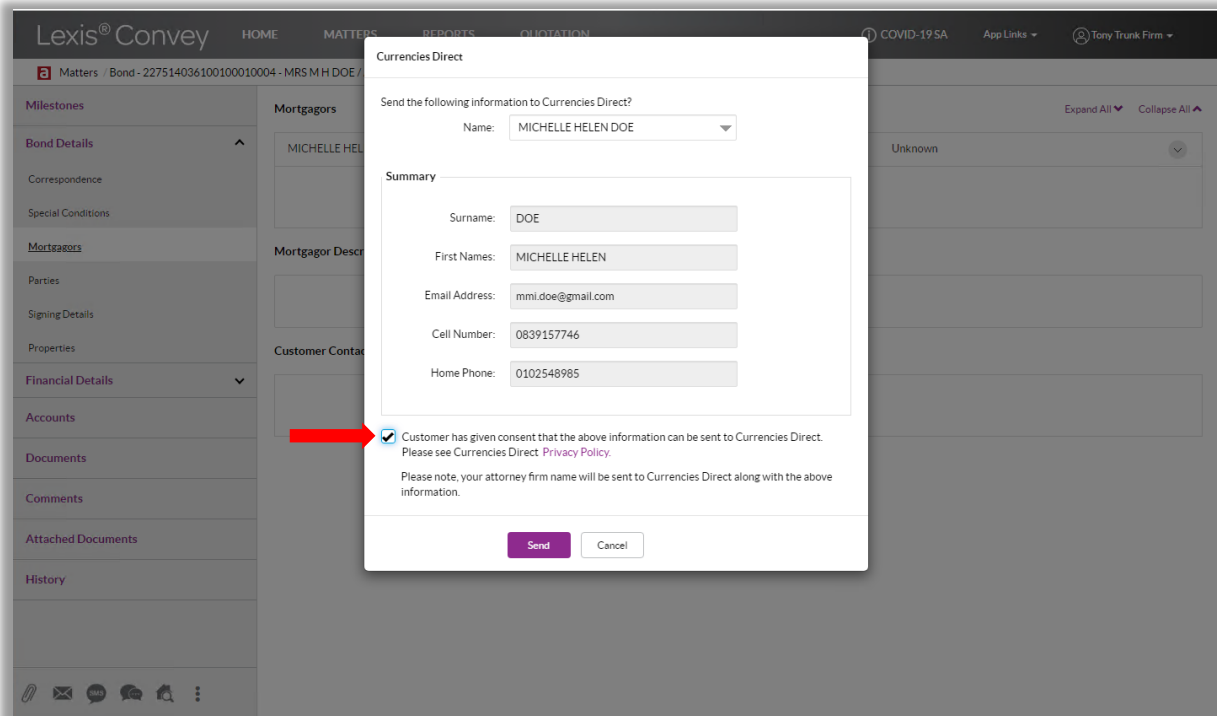
Below the fields, there is a checkbox for "Customer has given consent that the above information can be sent to Currencies Direct." and a link to "Please see Currencies Direct Privacy Policy." The dialog box also includes "Send" and "Cancel" buttons.

Once you have selected the Mortgagor / Party / Transferor / Transferee details, you will be required to confirm that the Customer has given consent for their personal details to be sent to Currencies Direct. Please ensure you obtain the necessary consent from your customer and please read the Currencies Direct [Privacy Policy](#).

## Lexis Convey Desktop:



## Lexis Convey Online:



Currencies Direct will then contact the Mortgagor, Party, Transferor or Transferee to offer their assistance with any of the customer's foreign exchange related requirements.

## Maintenance

Lexis Sign Certificate Updated.