# Lexis Convey v18.4.0

**Release Notes** 

2024/05/14

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## Lexis Convey - Password Management

The Lexis Convey password management has been enhanced by implementing the password policy. In today's digital landscape, safeguarding user accounts is paramount. By promoting stronger password practices, we enhance security and safeguard sensitive information.

#### Lexis Convey Logon dialog has been updated

The Logon dialog has been updated as follows:

- Logon Name field: Instead of selecting from a list, the user will now enter the logon name directly into a text box.
- Change Password button: The Change Password button has been removed. Password changes will now be enforced.
- Forgot Password button: A new Forgot Password button has been added. The Forgot Password allows the user to request a password reset if needed.

📠 Logon 🛛 🗙
Lexis®Convey
Logon name: Supervisor Password:
Forgot Password OK Cancel

#### Existing User

An existing user, upon logging on, will be prompted to create a password before gaining access to Lexis Convey.

To logon, access the Lexis Convey logon dialog and capture the logon name in the provided field.

Once the user clicks the **OK** button, a popup dialog will be displayed, and will be required to create a new password.

Capture the new password and click the **OK** button to save.



m Create New Password	×			
Create New Password A valid password is now required. Please enter your new password details				
below. New password: *				
Confirm Password: *				
OK Cano	el			

#### Forgot Password

A new **Forgot Password** button has been added to the Lexis Convey logon dialog. An existing user will now be able to reset their password by clicking the **Forgot Password** button.

🟛 Logon	×
	Lexis <sup>®</sup> Convey
Logon name: Password:	
Forgot Password	OK Cancel

Once clicked, the user will be presented with a blank popup screen.

m Forgot Password			×
Forgot password	Logon name:		
		OK Cancel	

Capture the required information and click the **OK** button.



Forgot Password			×
Forgot password	Logon name:	Supervisor	
	Email address:	supervisor@lexisnexis.co.za	
		OK Cancel	

Once the **OK** button is clicked, a temporary password will be generated and emailed to the user. Check the email for the temporary password and copy it to use it for logging on for the first time. When logging on for the first time, use the temporary password, then a prompt to change the password will be displayed.

Make sure to choose a strong and unique password.

m Create New Password	×
Create New Password A valid password is now required. Please enter your new pas below.	ssword details
New password: * Confirm Password: *	
ОК	Cancel

Capture the required information and click the OK button.

Clicking the **OK** button will display the confirmation popup screen.

Password change	×
Password changed successfully	
ОК	



## Setup: Add New User details page has been updated

The following fields have been added to the New User page is Setup:

- Ful Name
- Email Address

The following fields have been removed from the New User page in Setup:

- Password
- Confirm Password

Lexis® Con	vey	24 <u>Notices</u> ▼ <u>App Links</u> ▼ <u>Support</u> ▼	
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My Settings	×	RiteshR	-
Common Bonds	*	Supervisor	-

#### Adding a new user

The process of adding a new user has been updated. Instead of the Supervisor capturing the password, a temporary password will now be generated and emailed to the new user.

To add a new user, the Supervisor will be presented with a blank popup screen. Capture the new user details and click the **OK** button.

Lexis®Con	vey						24 Notices	a ▼ <u>App Links</u>	▼ <u>Support</u> ▼
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	^	filter text							7
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magdah Nolundi Test 1		KarenB	Logon details —	_					
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SimM Supervisor		NoPriveledgel		Lindi duuless. Sdx	gousos@naisiot.com	1			
		RiteshR	1						
My Settings	*	SimM	1			ок с	Cancel		
Our Branches (5) Notice Subscriptions		Supervisor	1						
Common	*								

Once the **OK** button is clicked, a temporary password will be generated and emailed to the user.



As a new user, they will need to follow these steps:

- Check the email for the Temporary Password.
- When logging on for the first time, the user will be prompted to change their password. Make sure to choose a strong and unique password.

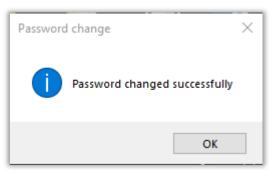
#### New User Logon

To logon as a new user, access Lexis Convey logon dialog and complete the new Logon Name and Temporary Password that was emailed.

Once the **OK** button is clicked, the user will be presented with a new entry.

Create New Password		×			
Create New Password					
A valid password is now required. Please e below.	nter your new password details				
New password: *					
Confirm Password: *					
	OK Cancel				

Complete the required information and click the **OK** button to save. Once the OK button is clicked, a confirmation popup screen will be presented.



Clicking the **OK** button will open the Lexis Convey application.



## Setup: Advanced Settings have been updated

The following new settings have been added to the Advanced Settings page:

- Logon Password Expiration (days)
- Notify user on Password Expiration (days)

#### Logon Password Expiration (days)

A password will be valid for at least 90 days from the day it is created. When the 90-day period is about to expire, a notification will be displayed to change the password.

The minimum number of days that the password remains valid will be configured in the **Logon Password Expiration (days)** setting.

Lexis <sup>®</sup> Conve	y				24	<u>Not</u>	<u>ices</u> ▼	App Links 🕶	<u>Support</u> -
MESSAGES	MAT	TERS REPORTS	DIARY	SETUP		Se	earch for mat	ler	ρ.
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Nolundi Branch		Description	*	Value			Default Value		
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<ul> <li>Trust Accounts (20)</li> </ul>	sourg	Login Password Expiration (days)		90			90		
Users	×	Notify User on Login Password Expira	tion (days)	15			15		
Users	•	WebConvey Web TPCS Login URL		https://wcextdev20	12.korbitec.com/api		https://convey	/ancing.nedsecure.co.za/	api
My Settings	¥								
Common	¥								
Dondo	*								

To configure this setting, access the Advanced Settings page and click the **Logon Expiration Password** (days) setting.

Once clicked, the user will be presented with an entry.

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MESSAGES	MAT	TERS REPORTS 🧿	DIARY	SETUP	Search for m	atter 🔎
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<ul> <li>Our Branches (4)</li> <li>Korbitec Test Branch</li> </ul>		Revert				
Nolundi Branch		Description		Value	Default Val	ue
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Trust Accounts (20)	sourg	Login Password Expiration (days)		90	90	
Users	*	🔟 Edit Setting				×
My Settings	×	Description     Enforces frequent Login Password char	ges			ng.nedsecure.co.za/api
Common	×					
Bonds	*	Login Password Expiration (days):			90 🔹	
Transfers	×	(				
Consents	*	Revert to Default			OK	
Correspondent Conveyancing	×	L				]

Complete the required information according to the field and click the **OK** button to save.



#### Notify User on Password Expiration (days)

When a password is created, a countdown begins, indicating the number of days remaining before the password expires. A notification will be displayed when the countdown reaches a specific number of days.

The number of days remaining before the password expires will be configured in the **Notify User on Password Expiration (days)** setting.

To configure this setting, access the Advanced Settings page and click the **Notify User on Password Expiration (days)** setting.

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Nolundi Branch - Durban		Login	7			T fil			7
Nolundi Branch - Johannest Trust Accounts (20)	burg	Login Password Expiration (days)		90		90	)		
Users	×	Notify User on Login Password Expiration	on (days)	15		15	5		
Users	·	WebConvey Web TPCS Login URL		https://wcextdev20	12.korbitec.com/api	htt	tps://conveya	ancing.nedsecure.co.za/	api
My Settings	×								
Common	¥								
Pondo	×								

Once clicked, the user will be presented with an entry.

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Nolundi Branch - Durban Nolundi Branch - Johannesi	hum	Login 🍸 filter text	T filter text	Y		
Trust Accounts (20)	bulg	Login Password Expiration (days) 90	90			
Users	¥	Notify User on Login Password Expiration (days) 15	15			
	×	WebConvey Web TPCS Login URL https://wcextdev2012.korbitec.com/api	https://conveyancing.nedsecure.co.za/api			
My Settings	Ŷ	m Edit Setting	×			
Common	¥	Description				
Bonds	¥	Notifies user on Login Password Expiration				
Transfers	×					
		Notify User on Login Password				
Consents	¥	Expiration (days):	15 🗢			
Correspondent Conveyancing	×					
Developments	¥	Revert to Default	ОК			
Advanced Settings						

Complete the required information according to the field and click the **OK** button to save. Once saved, the newly added setting will be displayed in the **Notify User on Password Expiration (days)** field.



## Password Expiration notification

The password expiration notification will be presented on a banner with the **Change Password** link to change their password.

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Change Password: Your password will expire in -7 day	(s). Change Password						х
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Milestone Summary Milestone Sum	Milestone Summary Milestone Summary						
					Seller Contacted	26 Anr 24	

When the **Change Password** link is clicked, the user will be presented with a new entry.

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SARS		<ul> <li>Instruction</li> </ul>		Logon name: Supervisor				
		26 Apr 24	Old	d password: *				
Additional	Documents	Instructic 26 Apr 24	Nev	v password: *				
No Accour	nts		Confirm nev	v password: *				
Messages		Summary				$\bigcirc$		
Matter Cor	mments	Free Form		ОК	Cancel	Action		
Attached [		Document	from Attorney			Action		

Complete the required information according to the fields and click the **OK** button to save.

Lexis <sup>®</sup> Convey	24 Notices - Ap	<u>op Links</u> ▼ <u>Support</u> ▼
MESSAGES     MAT	TERS REPORTS ODIARY SETUP	٩
Change Password: Your password	d will expire in -7 day(s). Change Password	
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Transfer - Sonwabile Mate       Save     Print     Email       Milestone Summary	zza 2024 Hihlights Reveiw Test - Transfer (Accepted) SMS Anytime Milestones - Send/Receive - Lexis WinDeed - Rates Clearance - Lexis Tracker Milestone Summary	▼ Guarantee Hub <sub>₹</sub>
Transfer Details ¥	Change Password  Change password  Logon name: Supervisor	^
SARS	✓ Instructic 26 Apr 24 Old password: *	
Additional Documents	V Instructio New password:	
R No Accounts	26 Apr 24 Confirm new password: ••••••••	
Messages	Free Form	
Matter Comments	OK Cancel	
Attached Documents	Documen't from Attorney Action	
	Progress Update Avian	

Please use the new password going forward.



### Setup: My Settings page has been updated

A new **Change Password** setting has been added to the **My Settings** page. Now, the Supervisor will no longer be responsible for changing user's password. This will enable users to change their passwords at any given time.

Lexis <sup>®</sup> Conve	y			13 <u>Notices</u> -	App Links 👻	<u>Support</u> <del>•</del>
MESSAGES	MATI	ERS REPORTS 🖸 DIARY SETUP		Search for m	atter	۹
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<ul> <li>✓ Our Branches (3) Tony CPT Branch Tony JHB Branch Tony PE Branch</li> <li>▷ Trust Accounts (7)</li> </ul>		General Settings Always save between matter tabs? Close send/receive dailog when  done?				
Users	×	Enable document centre?				
My Settings	*	Always save documents?				
<ul> <li>Our Branches (3)</li> <li>Tony CPT Branch</li> <li>Tony JHB Branch</li> <li>Tony PE Branch</li> </ul>		Save Bond documents to: C\Users\Administrator\Documents\Downloaded Doc Save Transfer documents to: C\Users\Administrator\Documents Save Development documents to:	s Browse Browse Browse			
Notice Subscriptions		Save Consent documents to:	Browse			
Common	×	Save Correspondent documents to:	Browse			
Bonds	×	Matter List Settings				
Transfers	*	Customise matter list: Bonds -	Customise			
Consents	×	Matter list batch mode enabled:				
Correspondent Conveyancing	×	Rodel Settings				
Developments	×	Rodel Credentials: Set	Credentials			
Advanced Settings		Change Login Password Settings Login name: Supervisor Change	e Password			
Account Items	×	Login name. Supervisor	Password			
Messages	¥					
Milestone Process Configurat	- *					

To change password, click the **Change Password** button.

Lexis <sup>®</sup> Conve	y		<mark>13</mark> <u>Notices</u> ▼ App L	inks 👻 Support 👻
MESSAGES		TERS REPORTS 🕑 DIARY SETUP	Search for matter	۹,
Firm Settings	*	My Settings		
✓ Our Branches (3) Tony CPT Branch Tony JHB Branch Tony PE Branch ▷ Trust Accounts (7)		General Satings Aways save between matter tabs? Close send/receive dialog when done?		
Users	¥	Enable document centre? 🔽		
My Settings	*	Aways save documents?		
<ul> <li>A Our Branches (3)</li> <li>Tony CPT Branch</li> </ul>		Save Bond documents to: C:\Users\Administrator\Documents\Downloaded Docs Browse		
Tony JHB Branch		Save Transfer documents to: C:\Users\Administrator\Documents Browse		
Tony PE Branch Notice Subscriptions		Save Development documents to: Browse		
Common	¥	Save Consent documents to: Browse		
Bonds	¥	Save Correspondent documents to: Browse		
Transfers	¥	Matter List Settings		
Consents	¥	Customise matter list: Bonds   Customise		
		Matter list batch mode enabled:		
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Developments	¥	Rodel Credentials: Set Credentials		
Advanced Settings		Change Login Password Settings Login name: Supervisor Change Password  Change Password  Change Password	sound	×
Account Items	¥	Change Password Change Password Change Password Change Password		
Messages	¥		Logon name: Supervisor	
Milestone Process Configurat	¥		Old password: *	
			New password: *	
			Confirm new password: *	
			OK Cane	el

On the popup, capture the required information.

Click OK to Save.



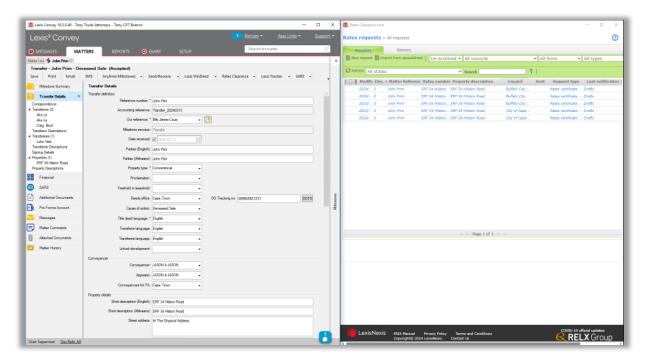
## Lexis RatesClearance and Lexis WinDeed Popup Windows have been

## Enhanced

#### Lexis RatesClearance

The Lexis RatesClearance popup window has been enhanced.

The user can now work on the Lexis Convey application and the Lexis RatesClearance popup window at the same time.

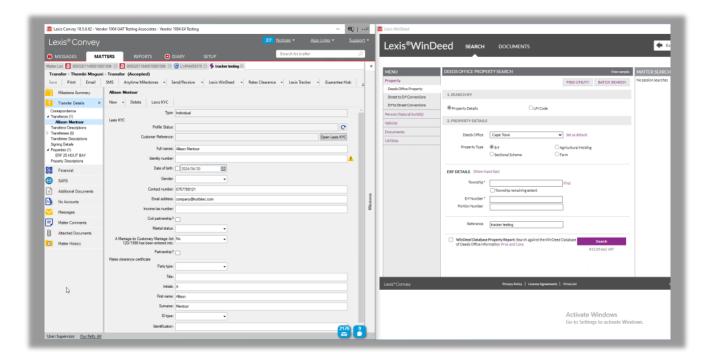


#### Lexis WinDeed

The Lexis WinDeed popup window has been enhanced.

The user can now work on Lexis Convey application and the **Lexis WinDeed** popup window at the same time.







## Standard Bank Limited: Access Bond Facility

### Initial Bond Instruction (27) message updated

The Initial Bond Instruction (27) message has been updated for Standard Bank Limited.

The access bond facility field has been added to the Initial Bond Instruction (27).

The access bond facility field will have only one of the following options:

- LIMIT
- LINK1
- LINK2

The access bond facility field will be displayed in the new Access Bond Facility (185) milestone.

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Send	d/Receive Send/Receiv	e for party	•											
	Inbox (22)	Inbox												
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ł	All Messages					🝸 filter tex			I filter text		I filter text		Tilter text	T
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		🗏 State	: Inbox (7	items)										
Ł	Downloads	¥	<u> </u>	Tony Release A	ttomeys	Standar	rd Bank LAW I	Bonds	Bond: Initi	al bond instruction (27)			2024/05/14 14:52:35	5
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		C	aptl subsy	amount:		0.00		-						
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			prope	erty type:		VACANT LAN								
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				ase date:		2021-05-20								
			prope	erty area q:		1780								
				erty measure:		SQM								
			bond prope			NOT FOUND								
				ess line1:		NOT FOUND								



## Standard Bank Limited: New Access Bond Facility (185) Milestone

The following new milestone has been added for Standard Bank Limited Bonds.

#### • Access Bond Facility (185)

The MT185 is a message from the Attorney to the Bank notifying the bank that the Mortgagor has accepted the Access Bond Facility.

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•	MESSAGES MAT	TERS REPORTS O DIARY SETUP	Search for matter	Q
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Bo	nd - COMBO PROPERT	IES TRUST / Standard Bank Limited - New (Accepted)		
Sav	e Print Email	SMS Anytime Milestones • Send/Receive • Lexis WinDeed • Lexis Tracker • Rodel Bridging Finance	Currencies Direct Import transfer to bond	÷
Ē.	Milestone Summary	Milestone Summary		
в	Bond Details ¥	Summary		^
	Financial ¥	Estimated Registration Date (09) 12 Jun 24 Action		
R	Accounts	Bond Type (65) Action		
2	Pay Authorities ¥	Free Format from Attorney (10)		
	Special Documents ¥	Progress Report (15) Action		
	Messages	Pre-Lodgement		
Ð	Matter Comments	Confirmation of Receipt Action		
0	Attached Documents	Mortgagor Contacted (34)		
0	Matter History	Access Bond Facility (185)		
		14 May 24 Mortgagor Signed Doc Access Bond Facility (185) X		
		03 Jun 24 Insurance Details (284 Access Bond Facility Offered: 2024/05/14		Milestones
		Accese Bond Facility Type:		Mile
		Accent Bond Facility Indicator		
		Draft Deed Received 30 May 24		
		Payment of Costs Action Cancel 10 Jun 24		
		Additional Participant Details (87)		
		Authority to Pay (13)		
		Debit Order (70) Action		
		New Postal Address of Mortgagor (71)		
		eDocuments Submitted (90)		
		eDocuments Verified (95)		
		Guarantee Notification (8)		
		07.Jun 24 Transfer Attorney Details (50) Action		
User	Supervisor <u>Our Refs: All</u>			

The Access Bond Facility (185) milestone will have the following fields:

- Access Bond Facility Offered
- Access Bond Facility Type
- Access Bond Facility Indicator

Clicking the Access Bond Facility Indicator checkbox will accept the bank facility.

#### Standard Bank Limited: Access Bond Facility Documents

The Access Bond Facility function will display one of the following documents in the Printlist depending on the **Access Bond Facility Type** field:

- Access Bond Limit Facility
- Access Bond Link Facility

