Lexis Convey v18.4.1

Release Notes

2024/05/30

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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 [®] 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 password below.	rd 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

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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.

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Supervisor		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.

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

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Nolundi Branch - Durban		Login	7			🝸 filter text		7
Trust Accounts (20)	burg	Login Password Expiration (days)		90		90		
lleare	×	Notify User on Login Password Expiration (days)		15		15		
Users	·	WebConvey Web TPCS Login URL		https://wcextdev2012.korbitec.com/api		https://conv	eyancing.nedsecure.co.za/ap	pi
My Settings	×							
Common	¥							
Pondo	*							

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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	a hu una	Login	7			🝸 filter text		7
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Users	*	💼 Edit Setting					×	
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Common	∗							
Bonds	×	Login Password Expiration				90 🗣		
Transfers	≽	(0033).						
Consents	*	Revert to Default				ОК	1	
Correspondent Conveyancing	∗							

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		Description		Value			Default Value		
Nolundi Branch - Durban		Login	Y			Y			7
 Trust Accounts (20) 	sourg	Login Password Expiration (days)		90			90		
llaara	×	Notify User on Login Password Expire	ation (days)	15			15		
Users	·	WebConvey Web TPCS Login URL		https://wcextdev2012.korbitec.com/api			https://conveyancing.nedsecure.co.za/api		
My Settings	×								
Common	×								
Pondo	*								

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

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 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		
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Consents	¥	Expiration (days):		
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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MESSAGES MATTERS	REPORTS	DIARY	SETUP		Search for n	natter	Q	
Change Password: Your password will expi	re in -7 day(s). Change Pi	assword						Х
Matter List 🤌 AG 20240426144325003 😒	Matter List S AG 20240426144325003 3 Milestones							»
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Milestone Summary Miles	rint Email SMS Anytime Milestones Send/Receive Lexis WinDeed Rates Clearance Milestone Milestone Confirmary					Confirmation of Receipt	26 Apr 24	
						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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Save Prin	t Email	SMS Anytime Mi	estones - Send/Receiv	re 🔹 Lexis WinDeed 🔹	Rates Clearance	Lexis Tracker	Guarantee Hu	ıb 📮
Mileston	e Summary	Milestone Summary						
T Transfer [Details ≫		m Change Password		×			^
Financial		Transfe	Change password					
		 Instruction 		Logon name: Supervisor				
		26 Apr 24	Old	d password: *				
E Additional	Documents	V Instructio	New	v password: *				
No Accou	nts	20 Apr 21	Confirm new	v password: *				
Messages	3	Summary				\sim		
Matter Co	mments	Free Form		ОК	Cancel	Action		
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Complete the required information according to the fields and click the **OK** button to save.

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	Transfer Details 🛛 🛛 🕹		Change Password		>	<		^			
	Financial	Transfe	Change password								
⊜	SARS	V Instructio	0	d password: *							
	Additional Documents	V Instructio	Ne	w password: *		•					
R	No Accounts	26 Apr 24	Confirm ne	w password: *							
	Messages	Summary									
E	Matter Comments	Free Form		ОК	Cancel	Action					
0	Attached Documents	Document	t from Attorney			Action					
		Progress	Indate			Action					

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.

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 ✓ Our Branches (3) Tony CPT Branch Tony JHB Branch Tony PE Branch ▷ Trust Accounts (7) 		General Settings Aways save between matter tabs? Close send/receive dialog when done?]						
Users	×	Enable document centre?]						
My Settings	*	Always save documents?]						
 Our Branches (3) Tony CPT Branch Tony JHB Branch Tony PE Branch Notice Subscriptions 		Save Bond documents to: C: Save Transfer documents to: C: Save Development documents to:	\Users\Administrator\Documeni \Users\Administrator\Documeni	ts\Downloaded Do	cs Browse Browse Browse				
Common	¥	Save Consent documents to:			Browse				
Bonds	×	Save Correspondent documents to:			Browse				
Transfers	¥	Matter List Settings							
Consents	×	Matter lat batch made apphilad.	, ius	•	Customise				
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Developments	¥	Rodel Credentials:		Set	t Credentials				
Advanced Settings		Change Login Password Settings							
Account Items	×	Login name: SL	ipervisor	Chang	e Password				
Messages	×								
Milestone Process Configurat	*								

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

Lexis [®] Conve	y		<mark>13</mark> <u>Notices</u> ▼ App L	inks 👻 Support 👻
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Users	¥	Enable document centre? 🔽		
My Settings	*	Aways save documents?		
▲ Our Branches (3)		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		
Transfere	×	Matter List Settings		
Carrante	*	Customise matter list: Bonds		
Consents	*	Matter list batch mode enabled:		
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Developments	¥	Rodel Credentials: Set Credentials		
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Account Items	¥	Change Password Change Password Change Password Change Password	nd	
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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_	Downloade	×	State	e: Inbox (7	items)											_
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<u>w</u>	Deeds Office Docum	ents		<u> </u>	Tony Release	Attomeys	Standard	d Bank LAW	Bonds	Bond: In	nitial bond instruction (27))	70241120010001000	4/20141022	2024/05/14 13:55	9:08
			Initial b From: Recipie Matter r	oond inst nt: reference:	ruction (27 Standard Ba Tony Releas 4338747011	nk LAW Bonds e Attorneys 00100010004	i vencor	ivev iveobaci	CHORON	Boboli	onen misin acadori		1112411300010000	4/2014/0/2	2023/05/05 11 2	/ /3
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				reten	tion amount		0.00									
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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	ES 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	Action		
		14 May 24 Mortgagor Signed Doc Access Bond Facility (185)	1	
		03 Jun 24 Access Bond Facility Offered: 2024/05/14		stone
		Access Bond Facility Type: UNK		Mik
		Draft Deed Requested Accept Bond Facility Indicator:		
		30 May 24		
		Payment of Costs 10 Jun 24		
		Additional Participant Details (87) Action		
		Authority to Pay (13) Action		
		Debit Order (70) Action		
		New Postal Address of Mortgagor (71)		
		eDocuments Submitted (90)		
		eDocuments Verified (95)		
		Guarantee Notification (8)		
		Transfer Attorney Details (50)		
	Summing Our Dat All			-8-
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

