

Lexis Convey v18.4.3

Release Notes

2024/07/25

TABLE OF CONTENTS

KZN Correspondent Conveyancing Fee update 2024	2
New Bond Institution: Oos Vrystaat Kaap Operations Limited	3
Lexis Doc Assembly (LDA) Updates: New and Existing Documents	6
ABSA Commercial Property Finance Consent	6
Maintenance	7

KZN Correspondent Conveyancing Fee update 2024

The KZN Correspondent Conveyancing Fees have been updated to reflect the changes as per the Recommended Guideline of Fees for Conveyancing which comes into effect on 01 July 2024.

ABSA Bank Limited: DebiCheck Options have Been Updated

The DebiCheck has been updated for ABSA Bank Limited.

In the Payment Details tab, under the Financial tab, there has been an update in the process to show the option "Other" under Repayment type.

The Escalation process will now be no longer required for v2 instructions.

The screenshot displays the LexisConvey web application interface. The main content area is titled "Payment Details" and is divided into two sections: "Miscellaneous Details" and "Primary Account Details".

Miscellaneous Details:

- Enrolment certificate: n/a
- Enrolment fee: 0.00
- Government subsidy amount: 0.00
- Outside HOC pro ins:
- Government guarantee:
- FlexiReserver sign:
- Agent commission:
- Comments: [Text area]

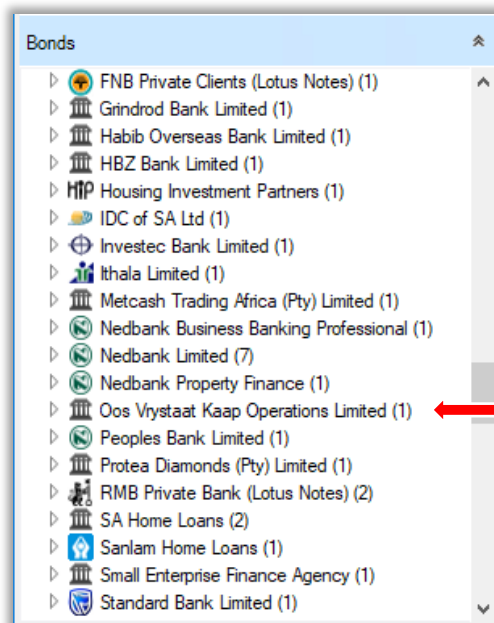
Primary Account Details:

- Party type: Natural Person
- Repayment type: Other (dropdown menu is open, showing options: Debit Order, EFT (Approved), EFT (Non-authenticated), Other)
- Contract reference: [Text field]
- ID / Registration number: [Text field]
- ID Type: ID Document

The interface includes a top navigation bar with "MESSAGES", "MATTERS", "REPORTS", "DIARY", and "SETUP". A search bar is located in the top right corner. The left sidebar contains a navigation menu with options like "Milestone Summary", "Bond Details", "Financial", "Payment Details", "Accounts", "Pay Authorities", "Special Documents", "Messages", "Matter Comments", "Attached Documents", and "Matter History". The bottom status bar shows "User: Supervisor" and "Our Refs: All".

New Bond Institution: Oos Vrystaat Kaap Operations Limited

A new Bond Institution 'Oos Vrystaat Kaap Operations Limited' has been added in Setup > Bonds > Institutions tab.



Lexis KYC Update: Trust Parties

Lexis KYC Integration has been updated for Mortgagors, Parties Transferors and Transferees for Trust and Trustees.

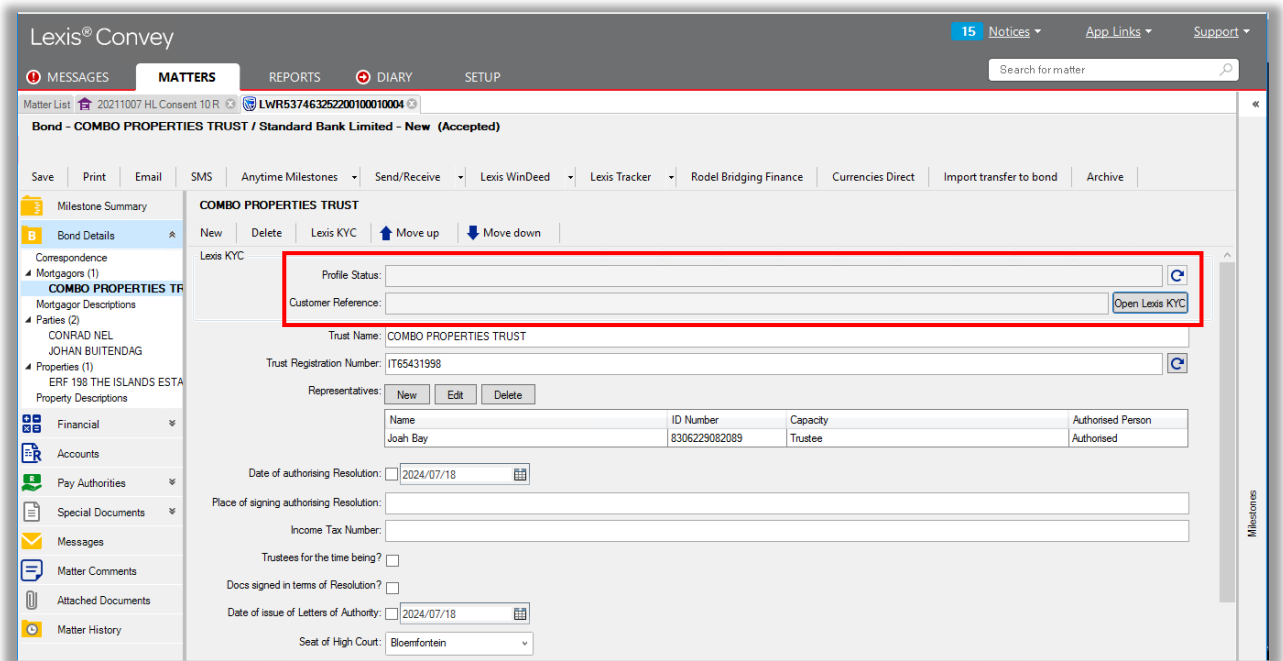
You will now be able to send a Trust and/or Trustees details to KYC for verification.

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

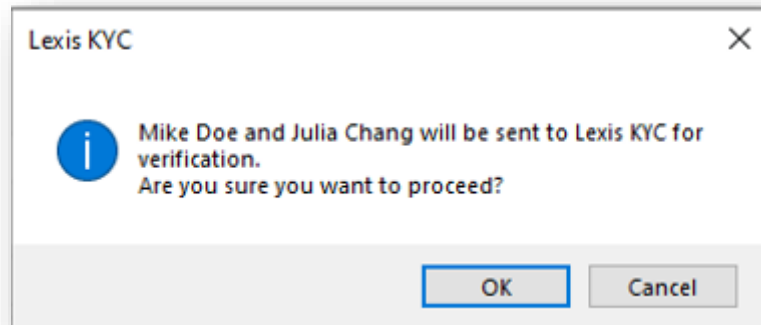
- Profile Status
- Customer Reference
- Open Lexis KYC

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

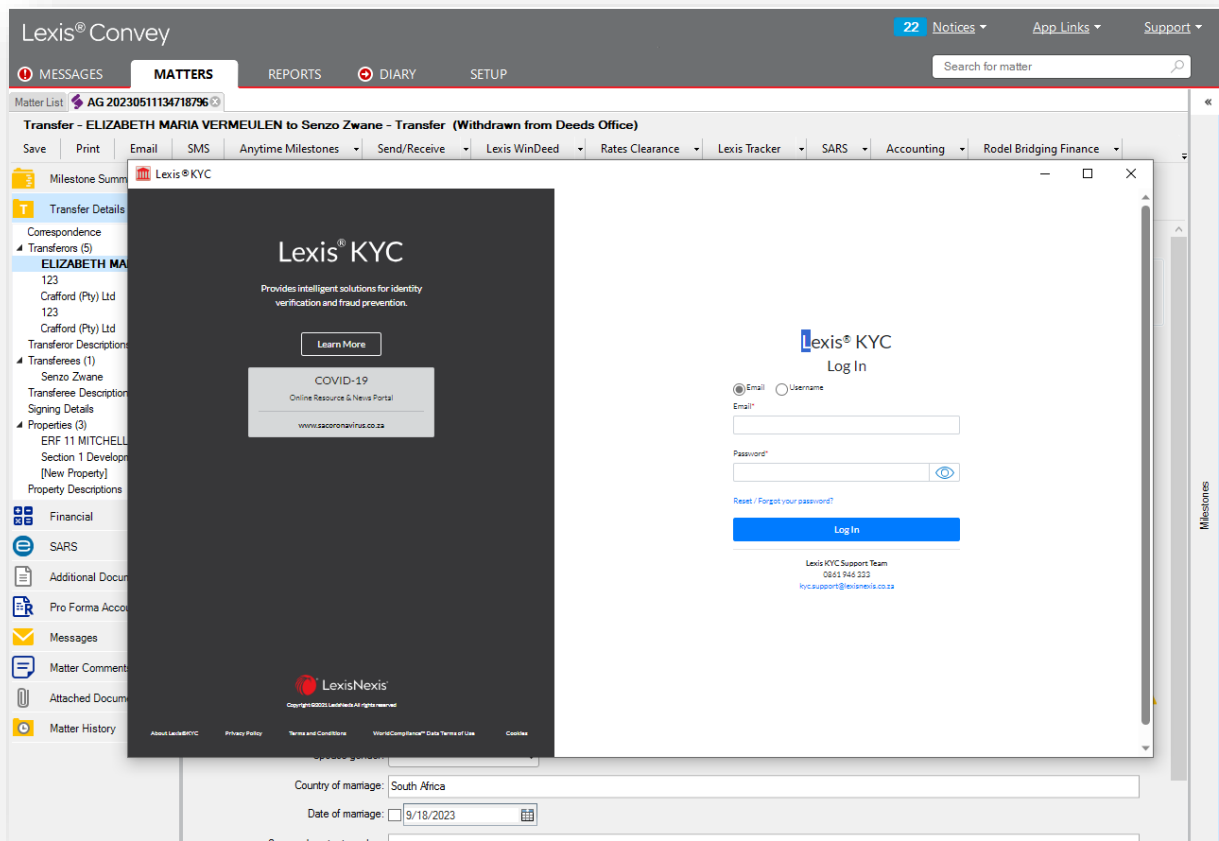
- Profile Status
- Customer Reference
- Open Lexis KYC



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.



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

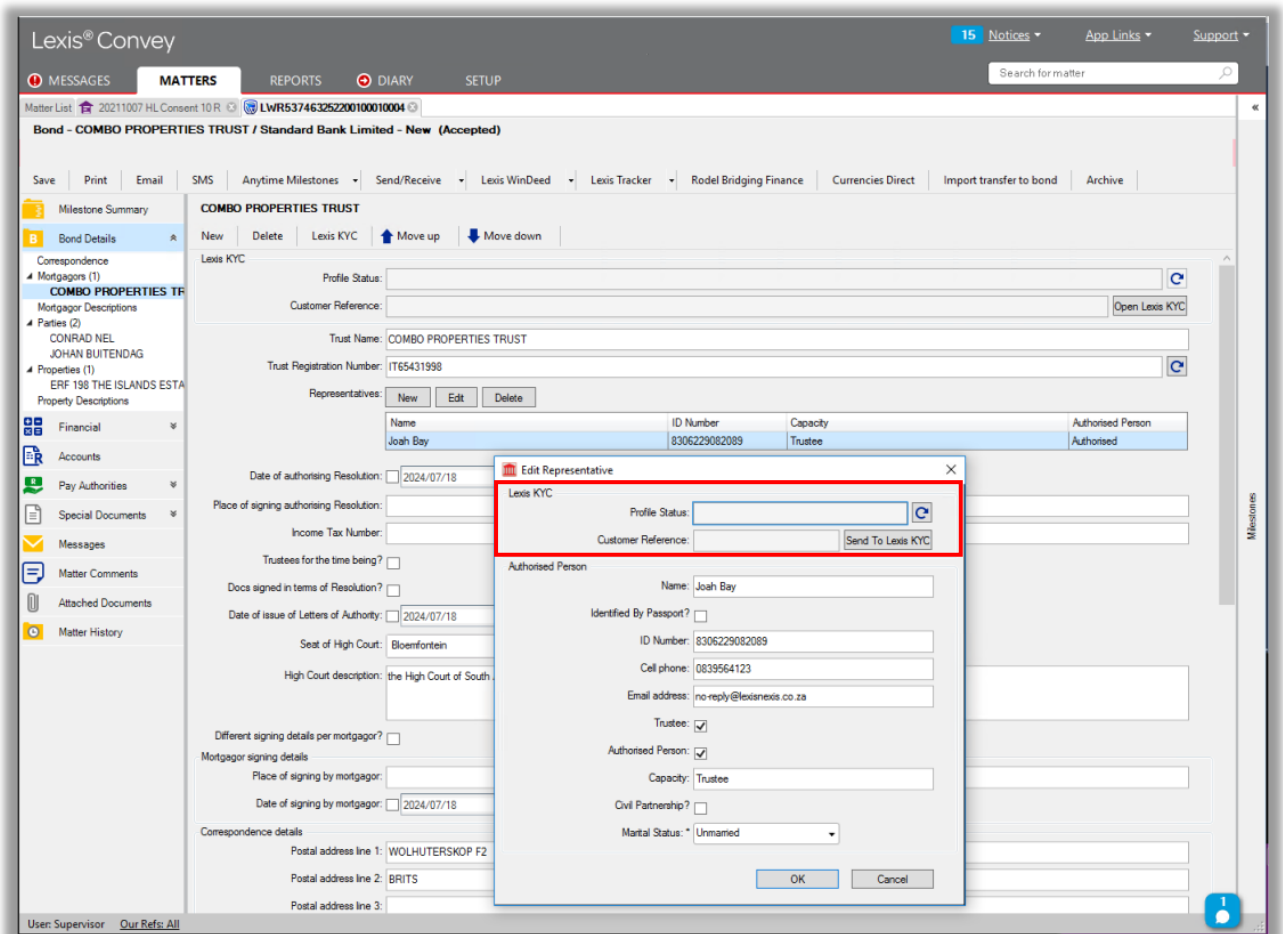
Please add any additional information that may be required and click 'Verify'.

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

You will be able to send Representatives for Trust and/or Trustees to KYC for verification as well.

Both in the **Bonds** and **Transfers** module for the Representatives have been updated with the following Lexis KYC details:

- Profile Status
- Customer Reference
- Send To Lexis KYC



Lexis Doc Assembly (LDA) Updates: New and Existing Documents

The following changes have been applied.

ABSA Commercial Property Finance Consent

The following document has been updated to include the 'is for AbsaCPF' field for ABSA Commercial Property Finance Consents:

- Refund Information Sheet

The following new documents have been added to the **Consent Documents** Print group for ABSA Commercial Property Finance Consents:

- General Resolution
- Mandate and Indemnity

Maintenance

- Attached docs that have 0 kb file size.