Lexis Convey v19.0.3.1

Release Notes

2025/12/10

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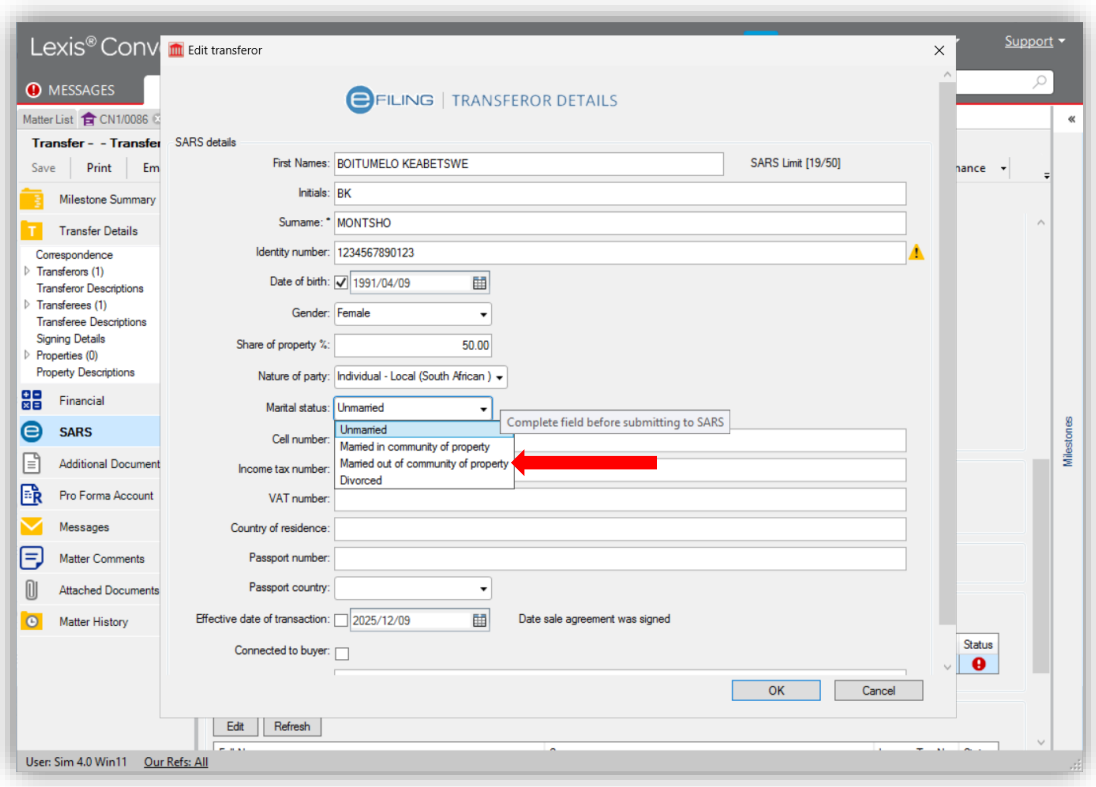
SARS Transfer Duty Updates

The following enhancements have been implemented in Lexis Convey Desktop to meet the latest SARS Transfer Duty requirements. These changes ensure that all Transfer Duty transactions comply with SARS rules relating to marital status, income tax registration, foreign resident requirements and validation of tax information.

New Marital Status

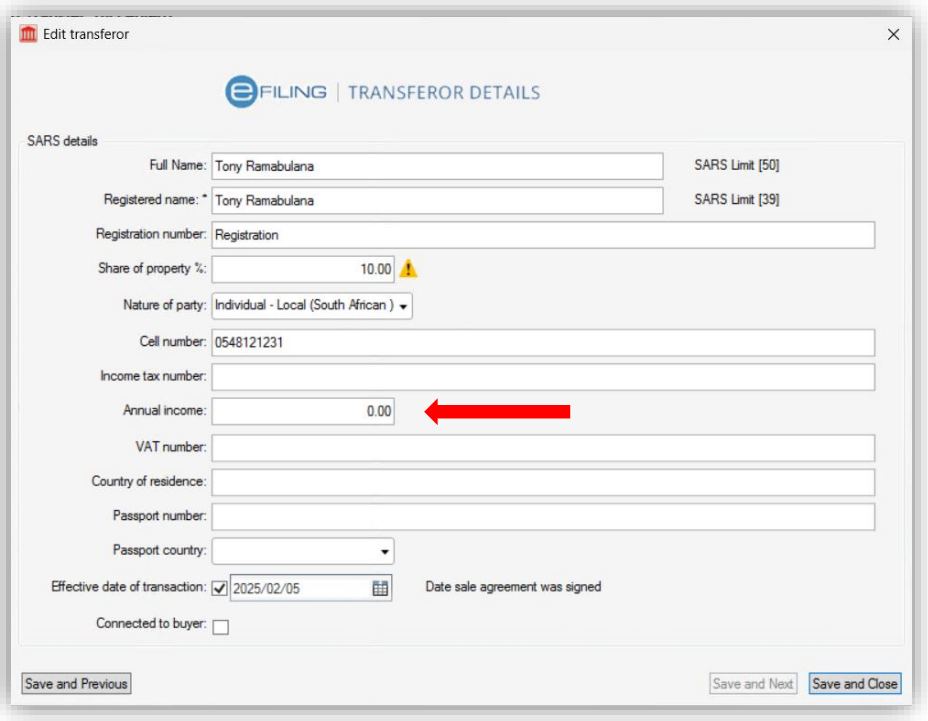
A new marital status, **Divorced**, has been added on the Transferors and Transferees pages. This option now appears in the list of marital statuses to ensure accurate information is reflected on the Transfer Duty Receipt and all supporting documents.



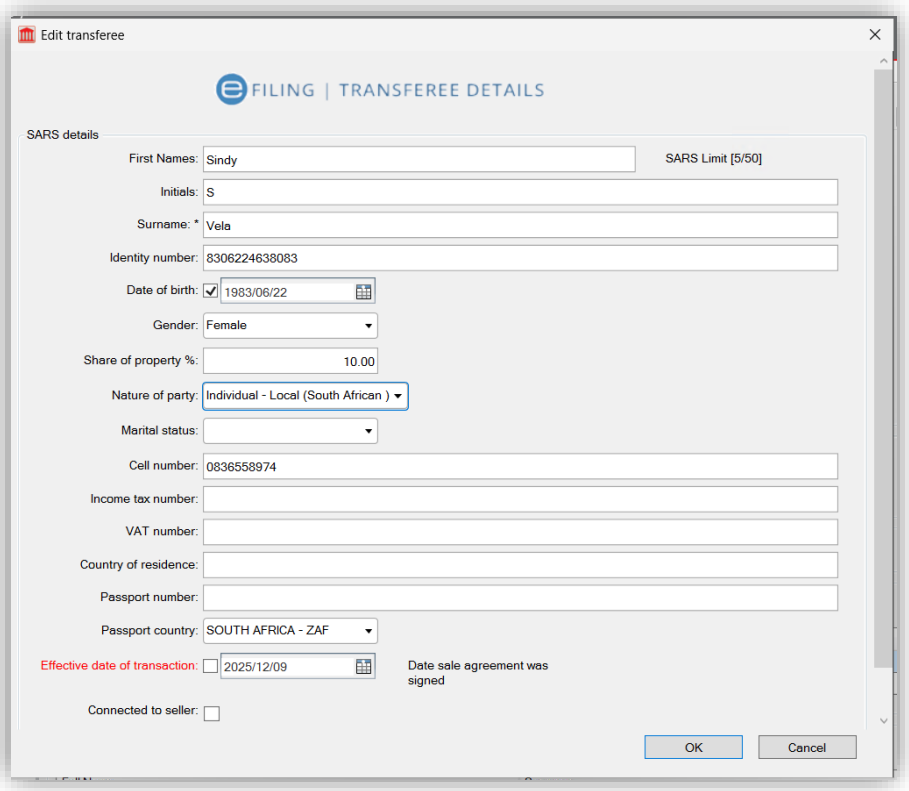
Annual Income Field Removed

The **Annual Income** selection has been removed from both Transferor and Transferee information. SARS has discontinued the use of this information, and it no longer forms part of the Transfer Duty submission process.

The Annual Income Field that has been removed.

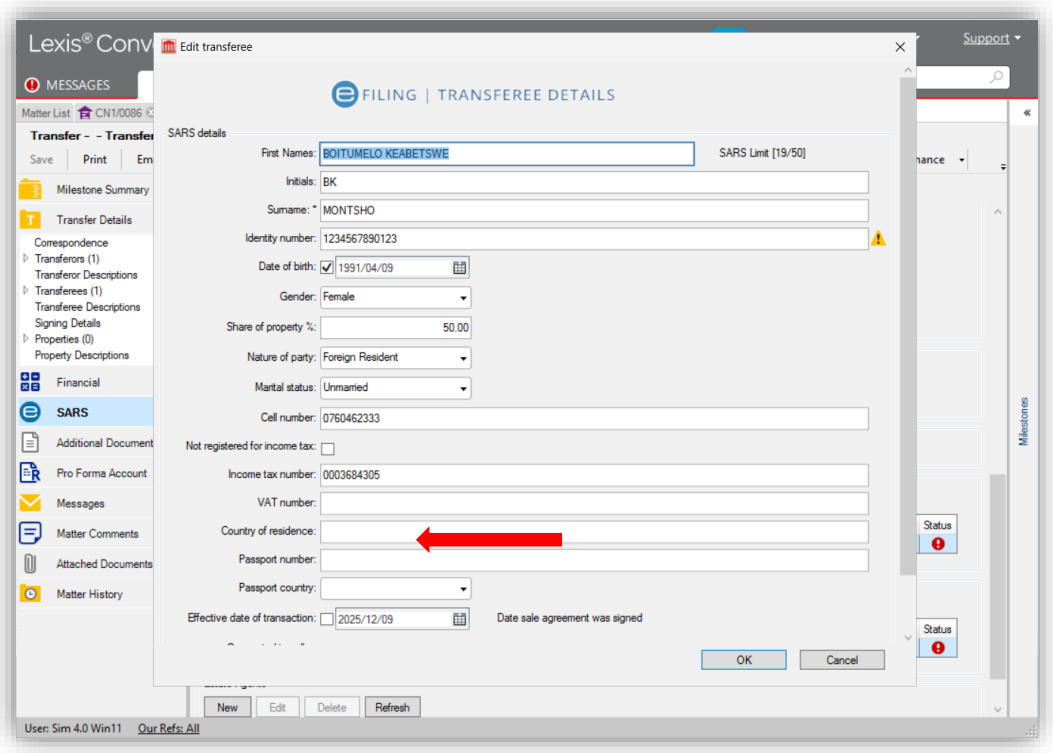


New layout without the **Annual Income** field -



"Not Registered for Income Tax" Added

A new option has been added to indicate when a person is **not registered for income tax**. This option is used when income tax details are not available, and SARS allows non-registration under specific circumstances.
Selecting this option enables the user to specify the applicable reason.

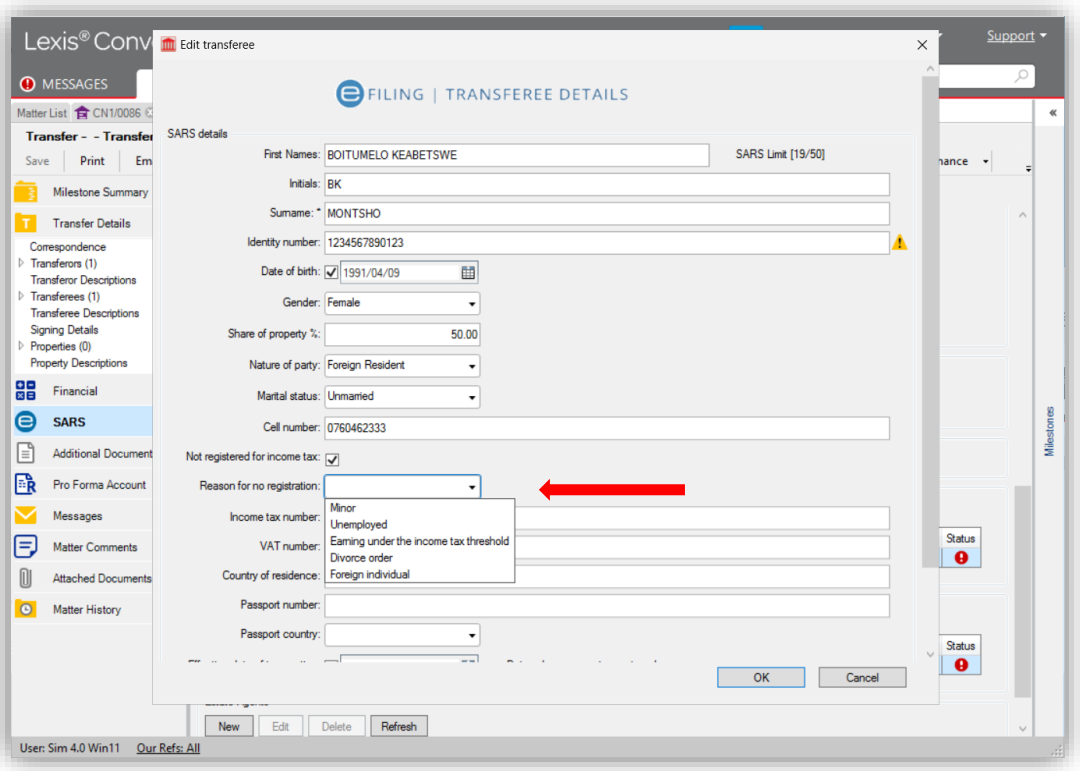


"Reason for No Registration" Options Added

When a person is identified as not registered for income tax, the following listed options are now available for selection:

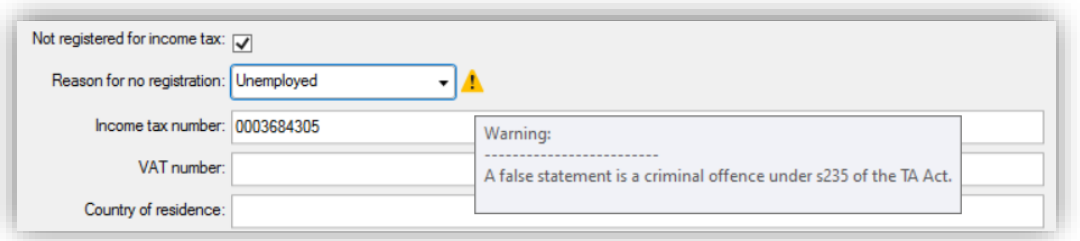
- Minor
- Unemployed
- Earning under the income tax threshold
- Divorce order
- Foreign individual

Only one option may be selected.



A SARS-required warning is displayed when a reason is selected:

"A false statement is a criminal offence under s235 of the TA Act."



Updated Rules for Nature of Person

SARS has introduced new requirements for validating income tax numbers based on the Nature of Person. These updates ensure that all tax numbers meet SARS formatting rules and are provided where necessary.

Individuals

- An income tax number is required when the Total Fair Value is **R2 million or more**.
- If an income tax number exists, it must be used for all values of transaction.
- The income tax number for an individual must begin with **0, 1, 2 or 3**.
- If the person is married in or out of community of property, **at least one spouse must have an income tax number**.

Juristic Entities

Income tax numbers are now required for all juristic entities, except for:

- Government and related entities
- Companies registered under Transvaal Law
- Foreign government organisations

Companies, Close Corporations and Co-operatives

- The income tax number must begin with **9**.

Trusts

- The income tax number must begin with **0, 1, 2, 3 or 9**.

Partnerships and Sole Proprietors

- The income tax number must begin with **0, 1, 2 or 3**.

Foreign Resident Requirements

SARS has revised terminology and requirements for foreign individuals. The term **Foreign Resident** is now used.

Sellers

A seller who is a Foreign Resident must provide both:

- An income tax number
- A passport number

These are compulsory for submission.

Purchasers

A purchaser who is a Foreign Resident and not registered for income tax must select **Foreign Individual** from the list of reasons for non-registration.

Income Tax Number Format

A Foreign Resident who is registered for income tax must use a number beginning with **0, 1, 2 or 3**.

Issues Resolved

The following are issues have been attended to:

- Language comparison when assembling GhostDraft templates.
- Nedbank - mapping Passport Number if mortgagor is identified by passport.
- Enabled Husband Domicile field when married by laws of, MICOP and MOCOP.
- Attaching a Consent document to matter with suggested filename results in errors.