

DELFIN CHANGELOG

LATEST
VERSION 8.90



DELTER

A DIVISION OF ALTRON



CHANGES FROM VERSION 8.89

New Features:

» **New Document Rules:**

If the “Use override net salary” setting in **Setup > Control > Affordability > Use affordability** is on then the new document rules will show in loan document setup.

Setting in control:

Budget living expense calculated on	Total income - statutory deductions
Use Override nett salary	<input checked="" type="checkbox"/>

Figure 1: Override Net salary

New rules available under **Setup > Loans > Loan documents**

All loans		SA
All loans	Gross - Stat (Nett Calculated)	SA
All loans	No rule	SA
	Normal insurance > 0	
	Additional insurance > 0	
	Gross - Stat (Nett Calculated)	
	Nett Salary Override	

Figure 2: Gross -Stat (Net Calculated)

- Gross – Stat (Nett Calculated): will only print when the affordability was completed normally and the nett override was not used while creating a loan
- Nett Salary Override: will only print when the nett override function was used while creating a new loan
- If the control setting is switched off and there are still documents that is linked to these rules then those documents will always print regardless of what the setting was

» **New Refund Options:**

-Refund options are available under **Setup > General > Control > Transaction > Refund Options** which can be enabled and disabled

General	Control	
Banks	Full Collapse Full Expand	
Card types	General	
Control	Insurance	
Day end reports	Late Interest	
Document manager	Late Service Fee	
Non banking days	Loan Categories	
Password policy	Loan General	
	Loan Instalments	
	Local backup email settings	
	Credit bureau integration	
	Network	
	Payout methods	
	Paypoint	
	Paysystem settings	
	Quote	
	Security	
	Transactions	
	Journals	
	Receipts	
	Payout	
	Refund options	
	Journal	✗
	Cash	✓
	Bank transfer	✗
	Nucard	✗
	Validation	

Figure 3: Refund Option

Only the enabled refund options will be displayed in the Client > Refund Client screen

File Number: 1 9012025079084 Balance: 1,615.49

Name: MORNE Surname: DIEDERICKS

Identity Number: 9012025079084

Name: MORNE DIEDERICKS

Address: LINE 1
LINE 2
SUBURB
TOWN
1121

Bank Name: FIRST NATIONAL BANK

Bank Code: 250655 Account Number: 62487898549

Amount: -30.20

Transaction

Refund method: Cash Payment from Paypoint MAIN PAYPOINT Description: REFUND: Cash payment Print Voucher

Loan	Type	Capital	Interest	Cost	Ini. Fee	Srv. Fee	Vat	Total
42	SHORT	0.00	0.00	0.00	0.00	0.00	0.00	-30.20

1 0.00 0.00 0.00 0.00 0.00 0.00 -30.20

Accept Discard Help

Figure 4: Refund Option on Client Profile

-If no refund options have been enabled, then a message will be displayed informing the client that they have no active refund options.

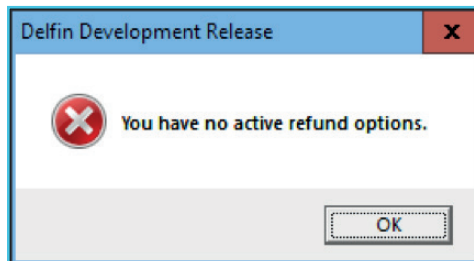


Figure 5: No Active Refund Option Message box

» New Settings for Cashbox transactions

Options are available under Setup > General > Control > Cashbox which can be enabled and disabled

Cashbox	
Receipt document	
Allow Bank cash on Cashbox	✓
Allow Cheques on Cashbox	✓
Allow EFT on Cashbox	✓

Figure 6: Cashbox Transaction



The settings are:

1. Allow Bank Cash on Cashbox,
-This setting will enable/disable the bank cash option under the cashbox menu

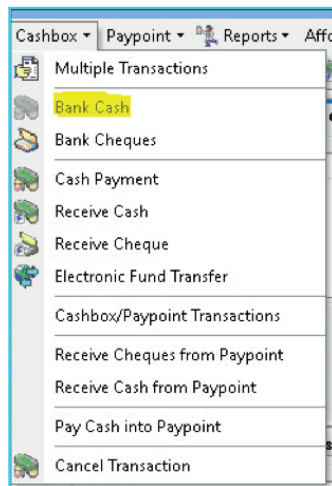


Figure 7: Bank Cash

It will also show/hide the bank cash transaction type when doing a Cashbox/Paypoint transaction

2. Allow Cheques on cashbox
-This setting will enable/disable all cheque transactions from the cashbox menu

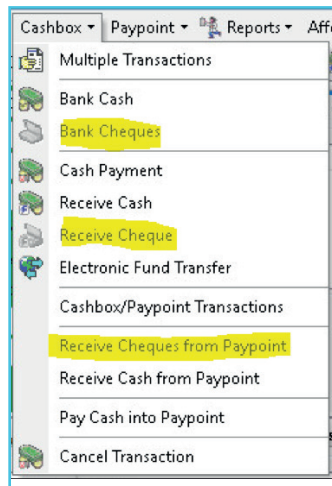


Figure 8: Cheque Transactions

-It will also show/hide the cheque transaction type when doing a Cashbox/Paypoint transaction

3. Allow EFT on cashbox

-This setting will enable/disable EFT transactions from the cashbox menu

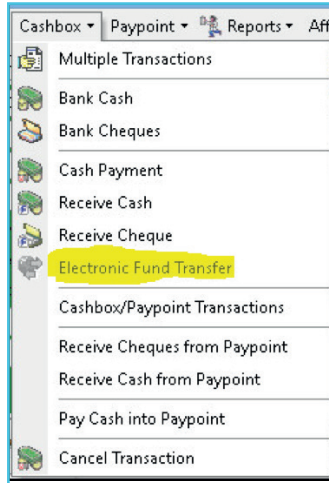


Figure 9: Electronic Funds Transfer

-It will also show/hide the EFT transaction type when doing a Cashbox/Paypoint transaction

» A new startup notification type has been added for prescribing loans

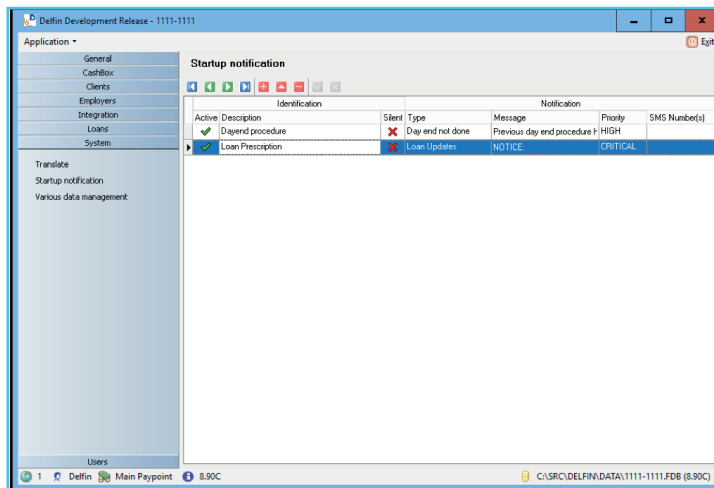


Figure 10: Loan Prescription

A new permission is available per user to receive this notification on startup under Users> Notifications> Receive system startup notifications> Get prescribing loan notifications



Figure 11: Get Prescribing Loans

-The system will once a day get the prescribing loan count from the SOS server and store it in CCI_CREDIT_CHECK.PRESCRIBED_COUNT and store the last day checked in CCI_CREDIT_CHECK.PRESCRIBED_TIMESTAMP.



- If the count is -1, it means the last check was unsuccessful and will be retried at the next opportunity.
- The check will fail silently.
- The permission is off by default
- The notification screen:

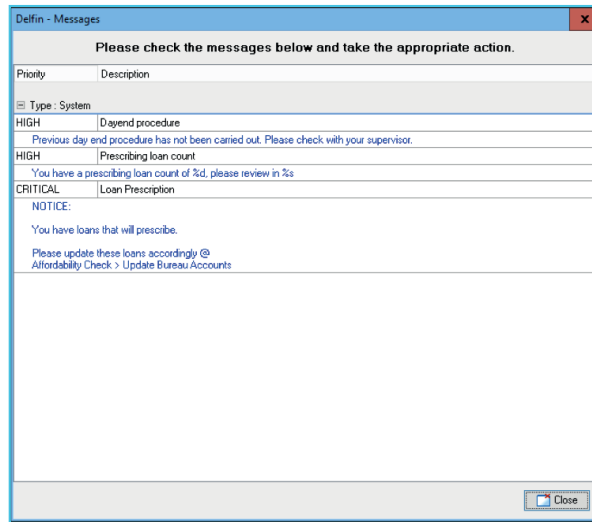


Figure 12: Notification Screen

- To update the prescribing loans, you can click on the menu item [Affordability Check > Update bureau prescribing accounts](#).
- If you have permission to receive the prescribing notification, then you will be able to view the prescribing accounts.
- There is an additional user setting (Can change status of prescribing loans) that allows the user to update the prescribing account's status.

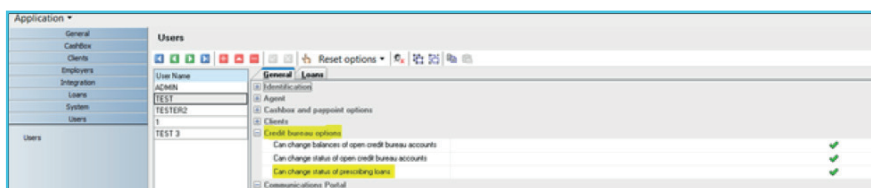


Figure 13: Change Status of Prescribing Loans

- The following screen will display all prescribing loans.

ID number	Name	Client	Surname	File nr	Loan nr	Period	Balance	Amens	Month/Amens	Status	Balance	Amens	Month/Amens	Last Update Date	Created Date	Status	Update	New Status	Interruption Date	Days Left
1	MICKY	MOUSE			1	2005	R10.00	R0.00	0	ACTIVE	R10.00	R0.00	0	2019/08/21	2019/08/21	Active		Prescribed		-31
1	MICKY	MOUSE			1	2008	R95.00	R0.00	0	ACTIVE	R45.00	R45.00	10	2019/08/21	2019/08/21	Handed over		Legal Interruption	2019/08/21	-31

Figure 14: Prescribing Loans

- The user will have the option to put the loan in one of the following two statuses:
 - **Prescribing**: All bureaus will be notified that this loan went into prescribing status.
 - **Legal interruption**: You need to specify the date when an account was legally interrupted. All bureaus will be notified about the legal interruption and the date it happened on.



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A DIVISION OF ALTRON

Contact Details

Tel: +27 12 060 0370

Email: info@delter.co.za

Physical Address:

Glenfield Office Park,
375 Oberon Ave, Block F,
Faerie Glen, Pretoria, 0081

Postal Address:

P.O. Box 70361,
Die Wilgers, 0042

www.delter.co.za

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