WEBFIN CHANGELOG

VERSION 2.29

Release date: 05/01/2021

DELTER

A DIVISION OF ALTRON

CHANGES FROM VERSION 2.28

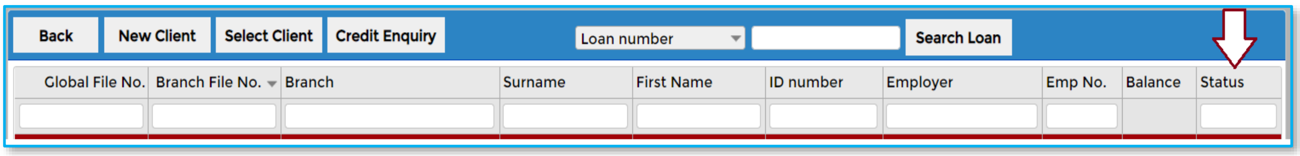
Updates:

- Fixed the “Client from another branch” permission which caused issues to open and view client documents when this permission was switched off.
- Removed the settlement is on by default option in the branch’s control setup. (If it was switched on it will be switched off on update). This change was necessary to allow the late fees charges and defaults to populate correctly.
- Removed the option “Force enquiry on client’s first loan” on the loan type configuration settings. This functionality has not been developed yet and will become configurable when it has been implemented.
- Removed the user permission to “Delete” an employer as there is no front-end function to delete an employer yet.
- Fixed the issue on Bank BI export on certain accounts where the field is more than the copy field.
- Fixed Webfin’s Desktop companion app to not crash on exceptions that was not handled.
- Fixed an error when sending SMSs from the Section 129 report and the system responds with an error but still sends the SMSs.
- Disabled the “Summary” option on report detail if the report type “Grid” is selected. Only Full Detail should be allowed if “Grid” is used for the report type.
- Fixed an issue where the “DebiCheck Approved Loans” notification count does not update correctly on new loans approved.
- Amended reporting on Form 39 on the number (count) of applications rejected for HDPs on the Summary, Unsecured and Short-Term pages accordingly.

Enhancements:

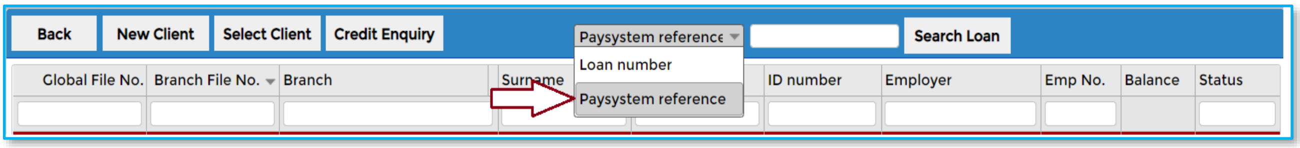
Client status filter on client search screen

Added a new filter to search clients by their “Status”. This filter can be found at Webfin > Clients, see the figure below:



Paysystem reference search

Added a new filter to search a loan using the integrated “Paysystem reference” recorded on the loan. This filter can be found at Webfin > Clients, see the figure below:



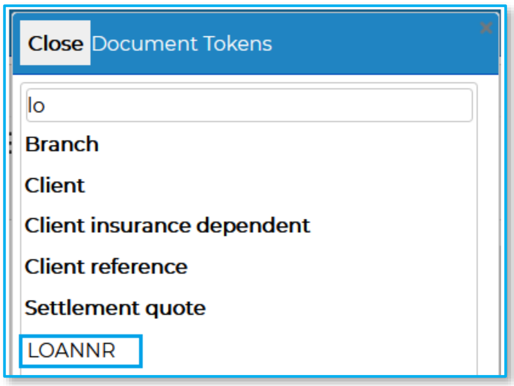
Credit Limit per frequency

The credit limit per frequency has been enhanced to calculate according to the client's "Pay frequency" set on their employer details. The calculation of each frequency is shown below:

- Any monthly frequency = Credit limit / 1
- Any fortnightly frequency = Credit Limit / 2
- Any weekly frequency = Credit Limit / 4

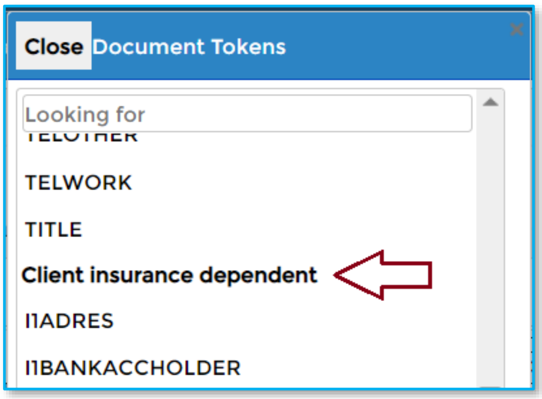
Loan Number token for the settlement quote document

Added a loan number token for the "Settlement Quote" document category in Setup > General > Document management > Settlement Quote. The loan number token has been placed in the following location, see the figure below:



Insurance dependent tokens

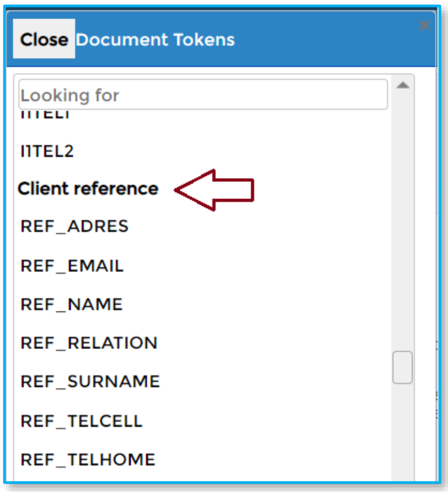
Added all the client's references data as tokens. These tokens can be added in the document manager in Webfin > Setup > General > Document management, see the figure below:



These tokens displace data collected from the insurance dependent fields, recorded on the client's profile

Client reference tokens

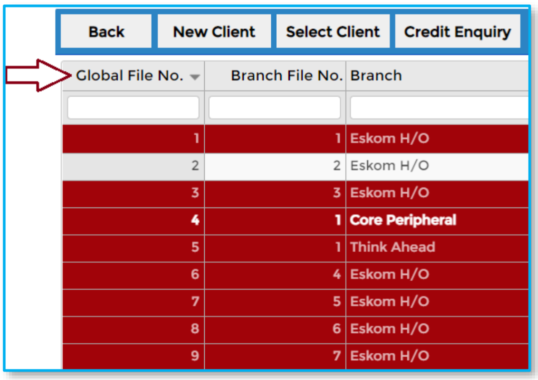
Added all the client's references data as tokens in Webfin. These tokens can be added in the document manager in Webfin > Setup > General > Document management.



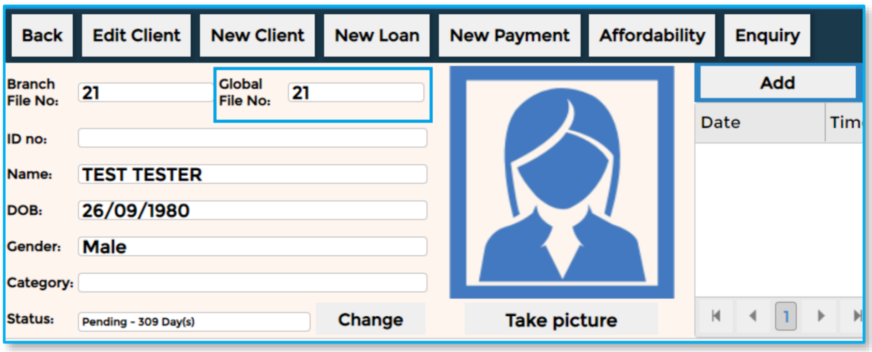
These tokens displace data collected from only the 1st reference recorded on the client's profile

Global file number on client search screen and profile view

» Added the global file number as a filter on the client search page, see figure below:

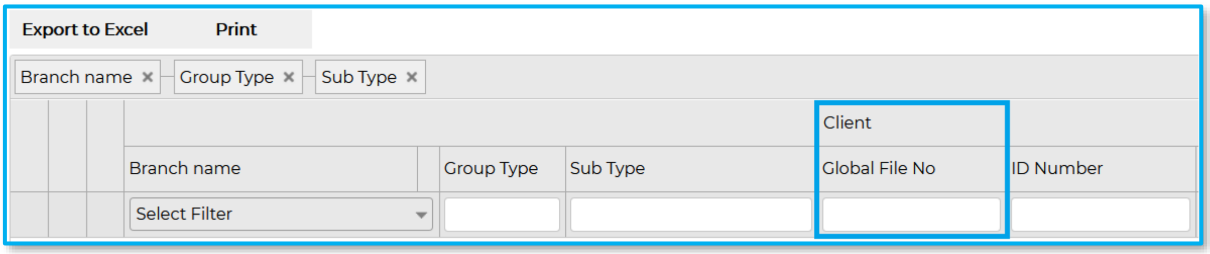


» Added the global file number on the client profile page, see figure below:

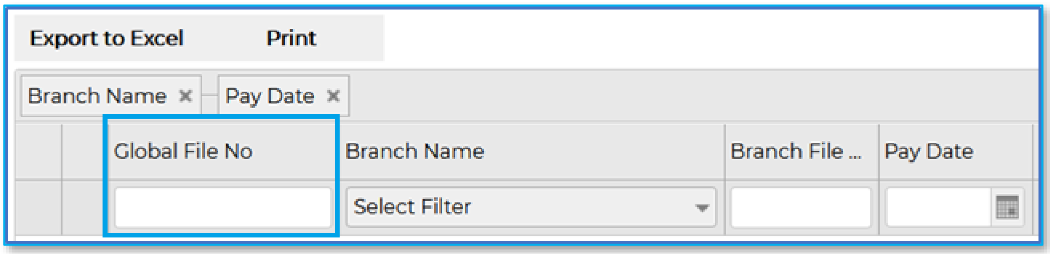


Global file number on the transaction and instalment report

» Added the global file number to the transactions report on Reports > Loan Transactions > Transactions > Report Type: "Grid", see figure below:

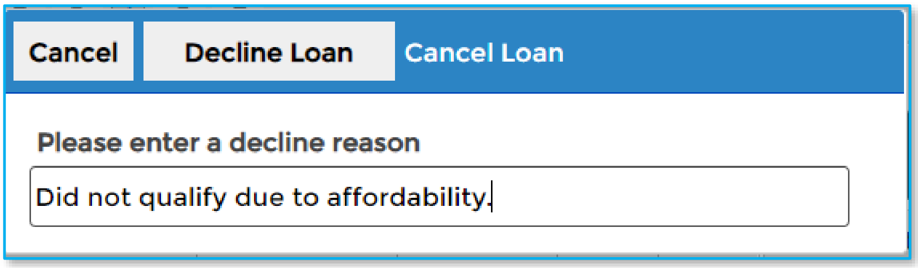


» Added the global file number to the instalment report on Reports > Instalments > Instalment > Report Type: "Grid", see figure below:



Decline reason input when declining a loan

» When declining a loan that is in pending or approved statuses, an input box will pop up where a user can input the reason, see figure below:



» The decline reason captured will be stored and can be viewed on the Declined Reason report on Reports > Loan > Declined Loans, see figure below:

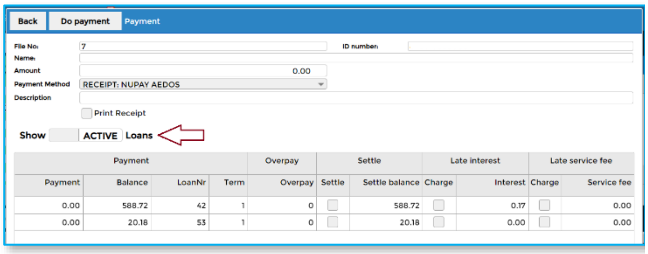
Loan Number	File Number	Declined By	Decline Reason
54	7	CHRISTIAAN	Did not qualify due to affordability.

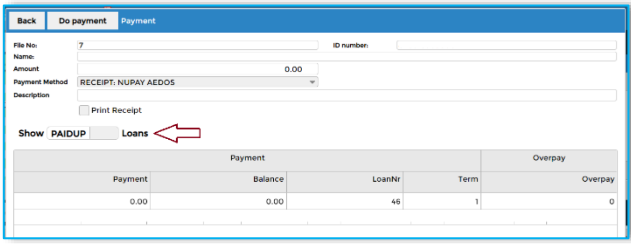
Count: 1

New Features:

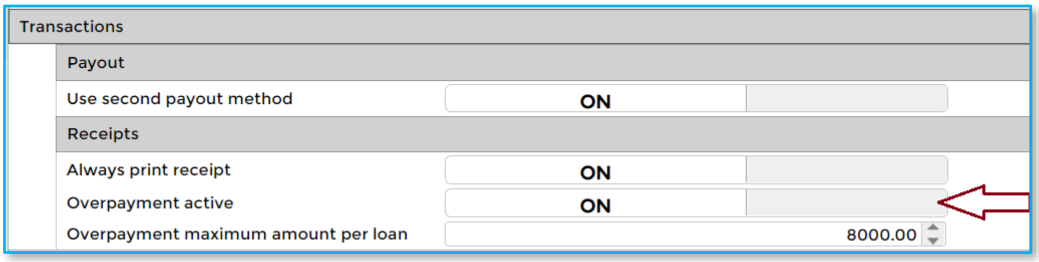
Allowing payments on paid-up loans.

Added functionality to allow the capture of payments of already paid up loans. This can be done when clicking on the “New Payment” button on the client profile page.
Once the Payment section displays, the user can navigate between Show - “ACTIVE” loans with a positive balance or “PAIDUP” loans with a R0.00 balance, see figures below:

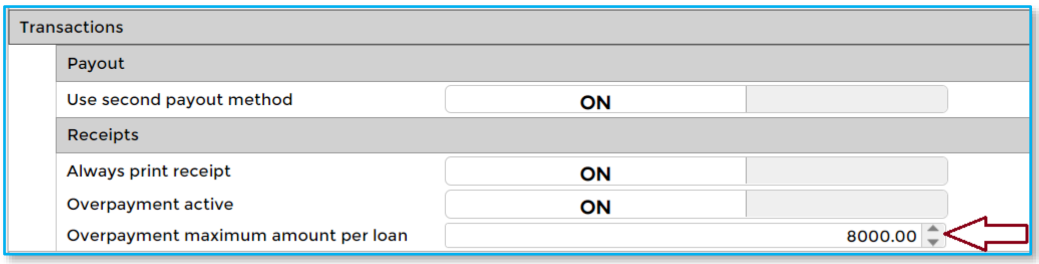




- » The paid-up loans capture method remains standard to the normal capture method.
- » A user cannot capture payments on active and paid-up loans simultaneously.
- » The paid-up loans navigation switch will only be available if there are loans that are paid-up with a balance of R0.00 on the client’s profile and the “Overpayment active” is switched on in the setup.
- » To set the “Overpayment active” to **ON**, go to Setup > Branch > Branch Setup > Edit > Control > Transactions > Receipts > Overpayment active, see figure below:



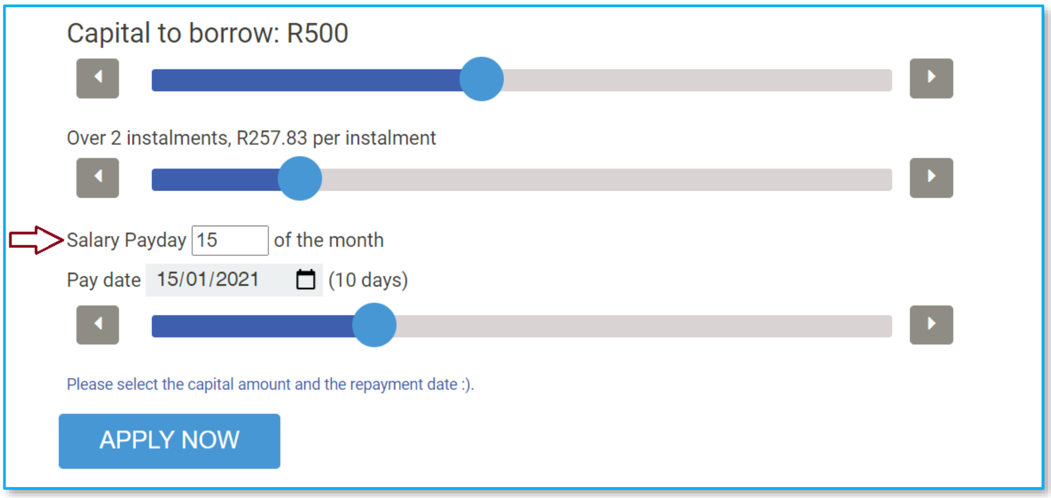
- » The maximum amount for a payment on a paid-up loan can be set in Setup > Branch > Branch Setup > Edit > Control > Transactions > Receipts > Overpayment maximum amount per loan, see figure below:



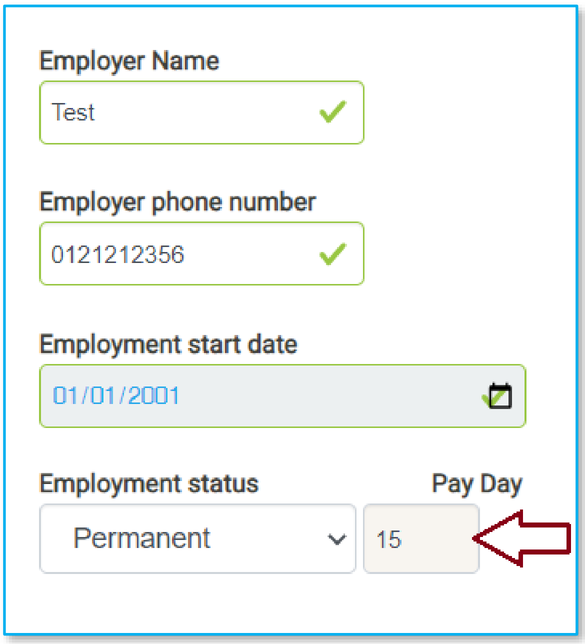
If an amount entered, exceeds the maximum when capturing a payment, the amount will default to the maximum amount entered here.

Client’s Salary pay day for Webloans

Added a field for the consumer to select their salary pay day to Webloans. If more than one instalment is selected, the user can input their “Salary Payday”, see figure below:



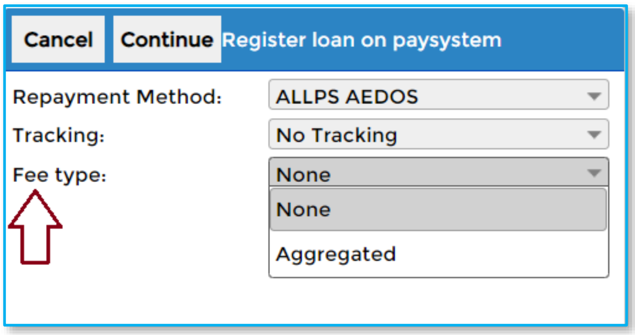
- The input will not adjust the calculations on the “Pay date” slider.
- The salary pay day will be captured and stored on the client’s employment details and cannot be edited when the consumer navigates to the employment section on Webloans, see figure below:



- This pay day will also be recorded on the client’s profile in Webfin once the client is successfully created in Webloans.

Allps fee types and amounts

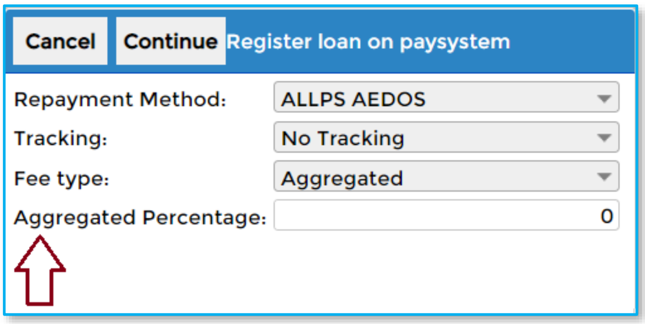
» New functionality has been added that will allow users to select an Allps fee type on any integrated Allps card swipe transaction, upon paysystem registration, see figure below:



The user will have two options:

- None
- Aggregated

» If Fee type – “Aggregated” is selected, the user needs to input a percentage value between 0 and 100, see figure below: (will default to 0)



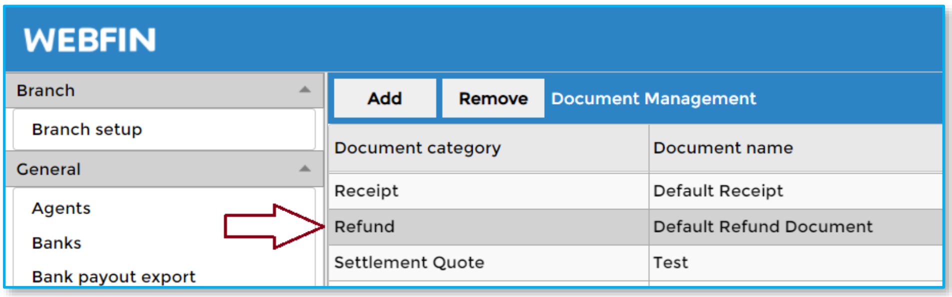
Signotec signature pads

Additions have been made to Webfin and Webfin’s desktop companion app to support the Signotec signature pads.

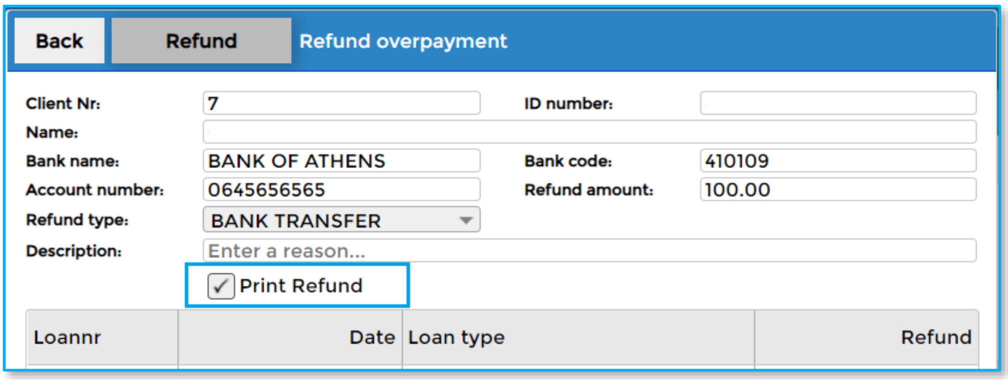
The Signotec signature pad can be used to capture user’s signatures as the Lender or Witnesses and to capture the Borrower’s signature for loan contracts and documents.

Document category for Refunds

- » Added a new document category for refunds.
- » The default refund document will be added automatically upon update.
- » The refund document can be printed out when a refund is due to a client, this means a consumer must have an overpayment on a loan (negative balance).
- » The Refund document can be found and edited at Setup > General > Document Manager > Refund – Default Refund Document, see figure below:



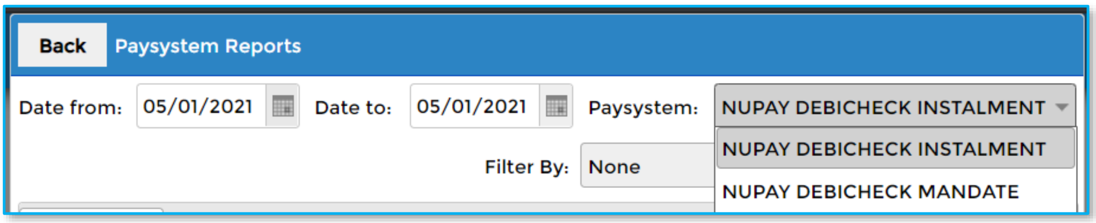
- » To print the refund document, tick the "Print Refund" option when capturing a refund for a client, see figure below:



NuPay DebiCheck Instalment & Mandate reports

Modified the paysystem report's menu to include NuPay's DebiCheck Instalment and Nupay's DebiCheck Mandate reports.

The reports can be viewed at More > Payment System Reports > Paysystem, see figure below:



- » Both reports can be filtered on, a from and to date range, Mandate ID, Contract Reference, and the Client's ID number.
- » Once the desired report is executed, each column from the results can be sorted in Ascending or Descending order.

» The **NuPay DebiCheck Instalment** report, includes the following report types:

- Successful
- Failed
- In Tracking
- Disputed
- Future
- All
- Cancelled

» The **NuPay DebiCheck Mandate** report, includes the following report types:

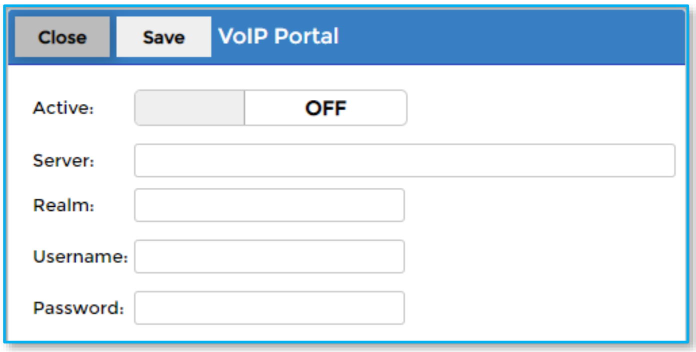
- Future
- Pending Authorisation
- Rejected Authorisation
- Inactive
- Suspended
- All

VoIP Integration

New functionality has been added on Webfin to allow users to make VoIP outbound calls to any client recorded within Webfin.

» VoIP Portal Setup

The VoIP Integration can be activated and configured in the setup at Setup > Integration > VoIP Portal, see figure below:



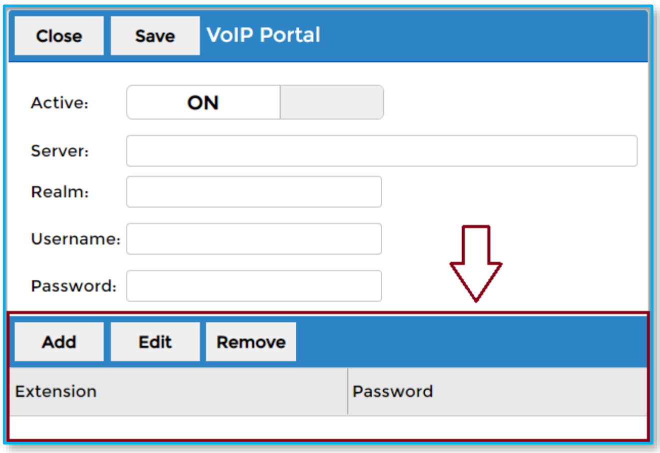
This setup can only be accessed if your user has corresponding permission. The parameters to be set in the Portal setup are:

- Active: ON or OFF.
- Server: URL/ Path of server set by the VoIP service provider.
- Realm: Details of realm as set by the VoIP service provider.
- Username: Username set by the VoIP service provider.
- Password: Password set by the VoIP service provider.

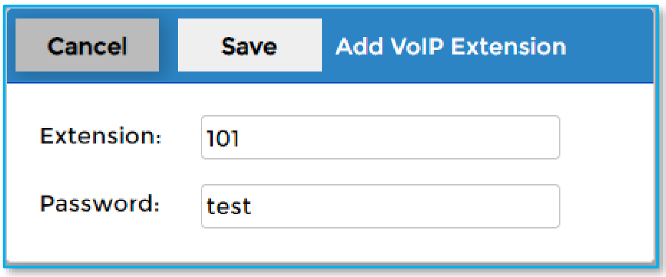
*The current VoIP service provider is - **Interexel World Connection – www.iewc.co.za***

» Managing VoIP Extensions

A user can manage VoIP extensions at Setup > Integrations > VoIP portal, see figure below:



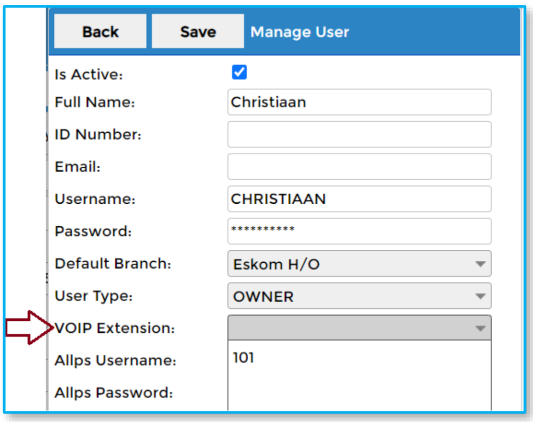
Here a user can – Add, Edit or Remove extensions. When adding or editing an extension, the "Add" or "Edit VoIP Extension" window will display, see figure below:



Here a user can input the "Extension" and "Password" as set by the VoIP service provider.

» Linking a VoIP extension to a User

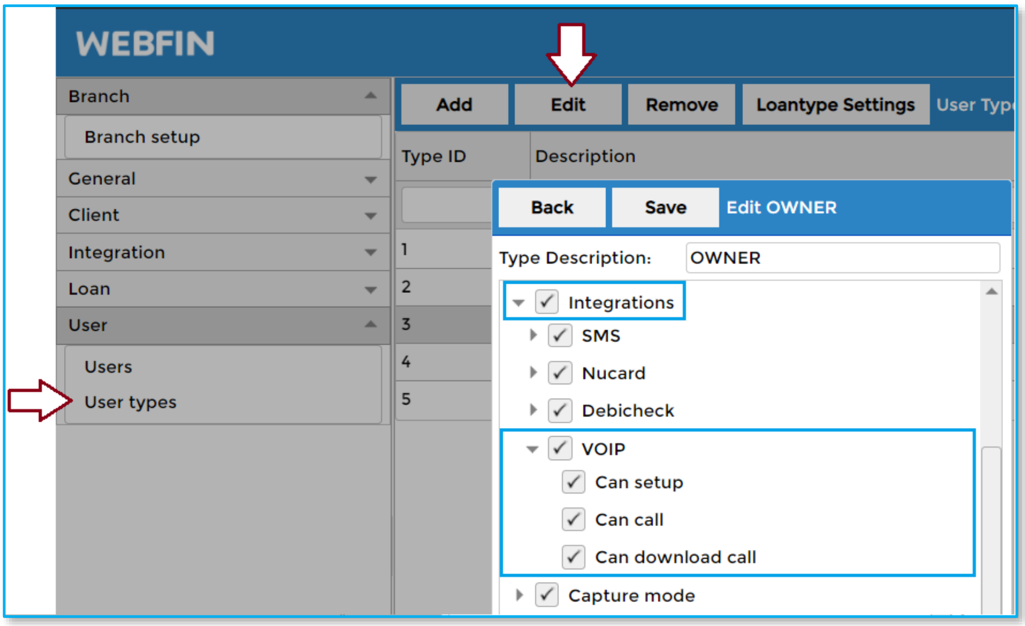
In order for a user to make a call, they must have a VoIP Extension linked to their user. This can be done in Setup > User > Users > Edit > VOIP Extension, see figure below:



Multiple users can be linked to the same extension

» VoIP user permissions

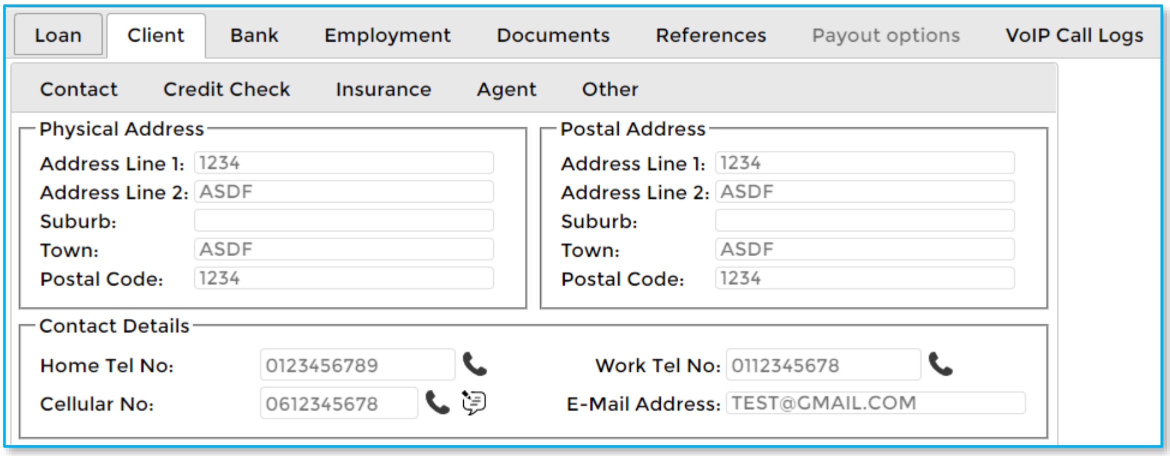
Three new user permissions where added for the VoIP integration and can be set at Setup > User > User types > Edit > Integrations > VOIP, see figure below:



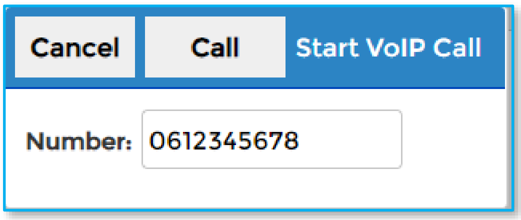
- Can setup: Allows the user to configure the VoIP Portal setup and manage extensions.
- Can call: Allows user to make outbound calls to clients.
- Can download call: Allows user to download previously recorded calls from the client's profile.

» Calling a client

You can contact the client on any of the contact details completed on the client's profile. The Home Tel, Work Tel and the Cellular No can be used. To start the call, the user must click on the phone icon (📞), see figure below:



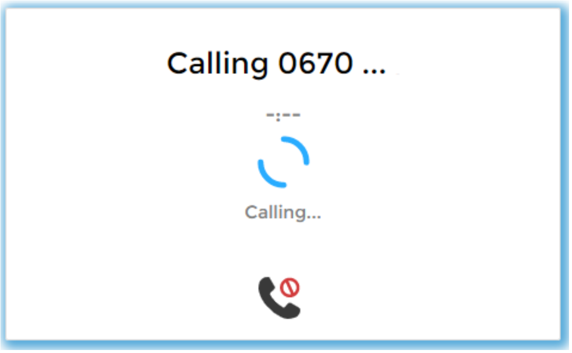
Once the icon is clicked, the “Start VoIP Call” window will popup, see figure below:



Here a user can:

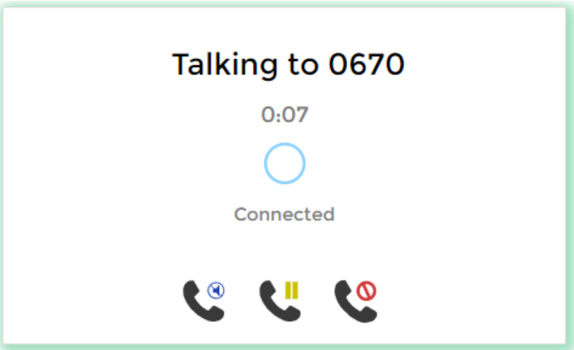
- Edit the number before calling
- Call the number presented in the “Number” box

If the call is initiated, a new window will pop-up and the system will attempt to dial the number, see figure below:



Can be used to terminate the call.

Once the call is established, the pop-up window will change and will display the call duration and additional functions, see figure below:



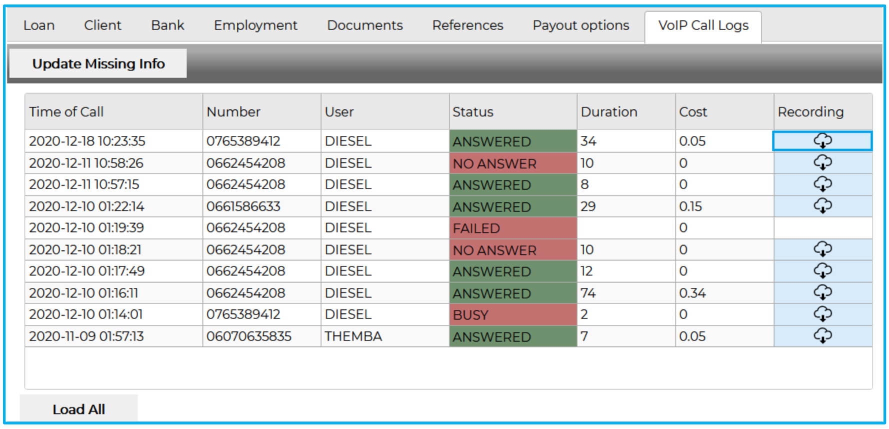
To mute your microphone.

To pause the call (background music will be played).

To terminate the call.

» VoIP Call Logs

All outbound calls made to a client is recorded with details related to that call. These logs can viewed on the client’s profile, on a new tab labelled – VoIP Call Logs, see figure below:

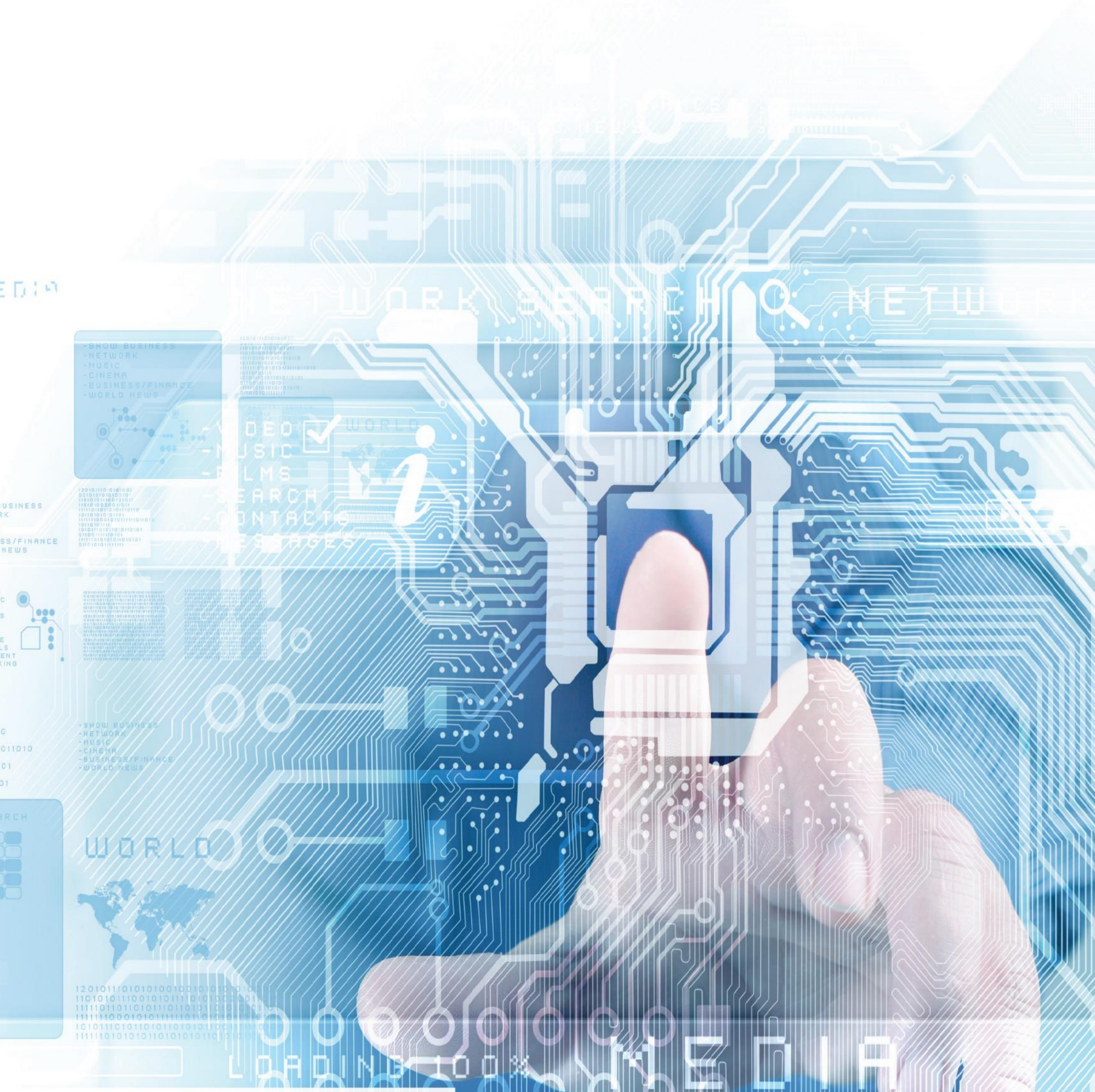


Time of Call	Number	User	Status	Duration	Cost	Recording
2020-12-18 10:23:35	0765389412	DIESEL	ANSWERED	34	0.05	
2020-12-11 10:58:26	0662454208	DIESEL	NO ANSWER	10	0	
2020-12-11 10:57:15	0662454208	DIESEL	ANSWERED	8	0	
2020-12-10 01:22:14	0661586633	DIESEL	ANSWERED	29	0.15	
2020-12-10 01:19:39	0662454208	DIESEL	FAILED		0	
2020-12-10 01:18:21	0662454208	DIESEL	NO ANSWER	10	0	
2020-12-10 01:17:49	0662454208	DIESEL	ANSWERED	12	0	
2020-12-10 01:16:11	0662454208	DIESEL	ANSWERED	74	0.34	
2020-12-10 01:14:01	0765389412	DIESEL	BUSY	2	0	
2020-11-09 01:57:13	06070635835	THEMBA	ANSWERED	7	0.05	

Here a user can:

- View all details related to the call.
- Update Missing info: When button is clicked the system will attempt to update any missing data that is not displayed on the log from the VoIP service provider.
- Load All: When button is clicked it will load all the call logs recorded on the client’s profile.
- Download recorded call using the cloud icon ( ). The system will attempt to download the recording stored at the VoIP service provider in MP3 format to your local machine.

End of Webfin V2.29 Changelog



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