DELFIN CHANGELOG

VERSION 8.97

Release Date: 24/03/2021

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CHANGES FROM VERSION 8.96

Updates:

≈ Fixed an issue where a user can add an affordability item with no description.

≈ Fixed an issue where a user can delete a nationality in the setup if it is linked to a client.

≈ Fixed an issue where a user could not delete an insurance type after it was created in the setup.

≈ Fixed an issue when granting or revoking all permissions with the icons (⊞ ⊟) on a user, not all permissions was granted or revoked.

≈ Fixed an issue which allowed the creation of a loan purpose without a description in the setup.

≈ Fixed an error message that was returned when sending an email from the Dokuments tab on a client's profile and there is no email configuration for the branch in the setup.

≈ Fixed an issue on the Local PC Setup & Setup permissions for printers, where the system loaded the Printer tab first if the user did not have Setup permissions for it.

≈ Modified the NuPay's DebiCheck registration call to include the employer code.

≈ Modified the Paypoint Transaction Grid report to include sub totals for groups.

≈ Modified the Loan Status report to enable the selection of all statuses if the use of loan status is deactivated in the setup.

≈ Modified certain Insurance integration functions to use TLS 1.2.

≈ Modified procedures for the Form 39 on the number (count) of applications rejected for HDP's on the Summary, Unsecured and Short-Term pages accordingly.

≈ Modified the procedure to check for the maximum capital limit to allow the creation of a R100,000,000.00 loan.

New Features in 8.97

☞ **DebiCheck Permissions**

Added permissions for DebiCheck TT1 transactions to the current Loan type permission set "Status" and renamed the label to "Status and DebiCheck loans", as per figure below:


Standard loan statuses and DebiCheck loans will now use the loan type permissions set per user.

NuPay DebiCheck TT1 Realtime

Added the functionality to create a NuPay DebiCheck TT1 Realtime contract ,which will follow the standard NuPay TT1 Realtime processes on initiation and the loan status process in Delfin. The following additions and changes were made:

- The repayment method "**NuPay TT1 Delayed**" has been renamed to "**NuPay TT1**". Both Delayed and Realtime transactions will be recorded on the "NuPay TT1" repayment type.

- A setup setting was added to the CPRAS Setup (Setup > Integration > CPRAS Setup) with label: "**TT1 default auth type**". This will enable a user to select a default authentication type for new contract registrations, as per figure below:
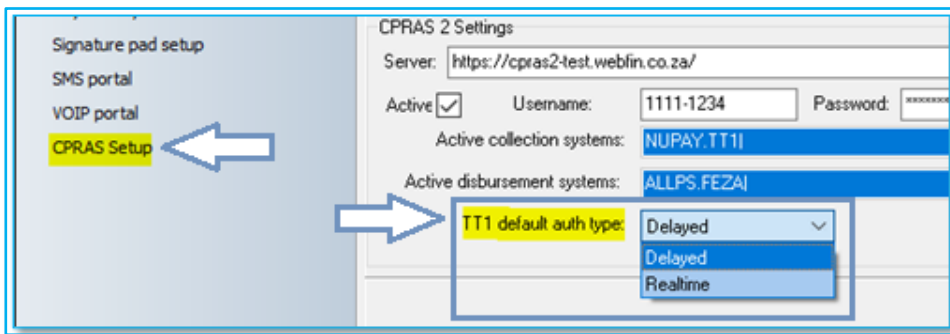
The "TT1 default auth type" will default to "Delayed" on update

- The authentication type can also be selected during the contract registration process. A dropdown menu has been added with label "**Auth Type**" to allow the user to select the authentication type, as per figure below:
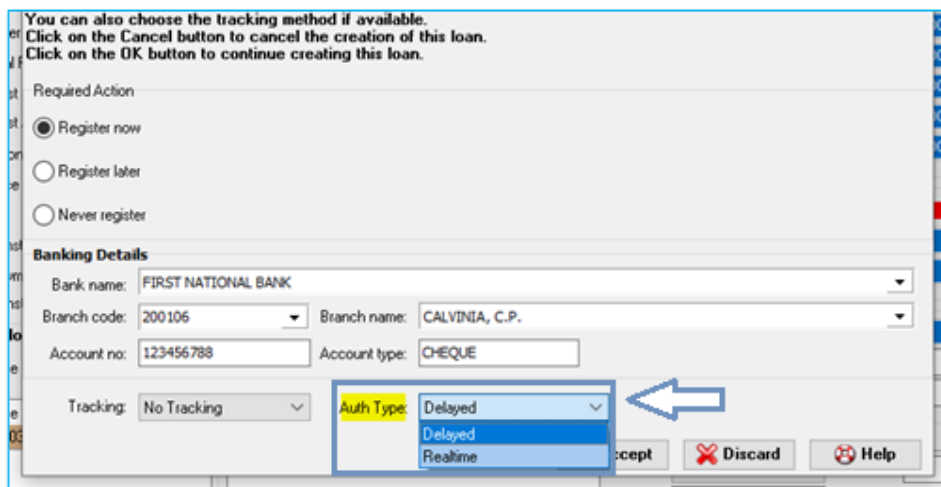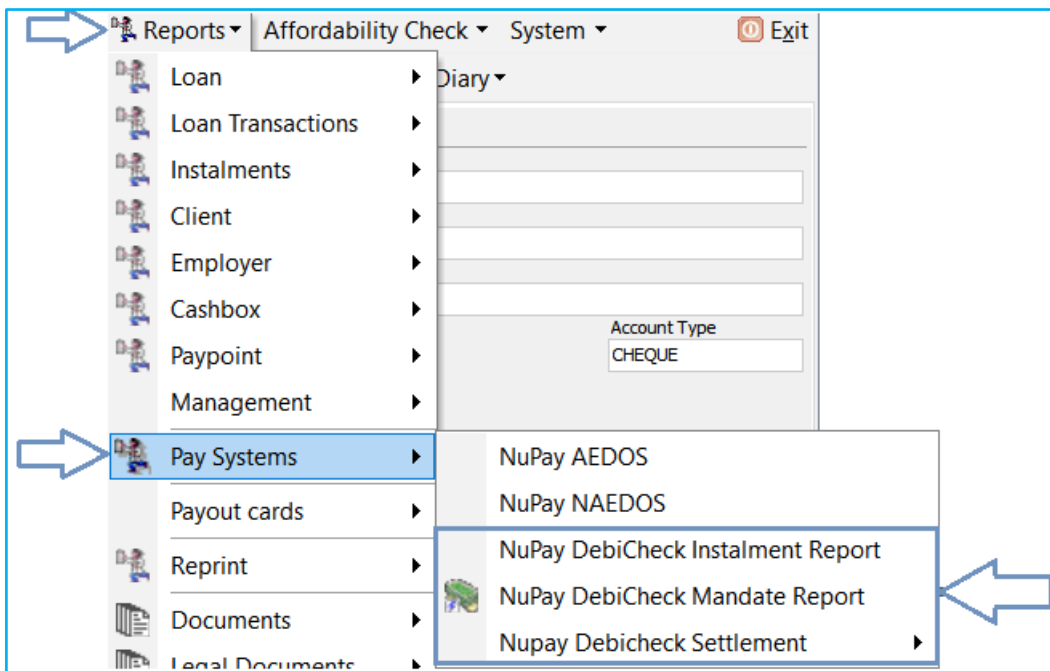

The option will default to the authentication type selected in the "CPRAS Setup"

NuPay DebiCheck Reports

Added the following NuPay's DebiCheck reports to Reports > Pay Systems:

- NuPay DebiCheck Instalment Report
- NuPay DebiCheck Mandate Report
- NuPay DebiCheck Settlement

> *Will only display if DebiCheck TT1 or TT3 is Active in the Setup*

- *NuPay DebiCheck Instalment Report*

Filters:

- From and To Date
- Mandate ID
- Contract Reference
- Client ID Number

Report Types:

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

- *NuPay DebiCheck Mandate Report*

  Filters:

  - From and To Date
  - Mandate ID
  - Contract Reference
  - Client ID Number

  Report Types:

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

- *NuPay DebiCheck Settlement Report*

  Types:

  - TT1 – *Will display all transactions for Debicheck (TT1 & TT3)*
  - TT3 – *Will display all transactions for Debicheck (TT1 & TT3)*

  Filters:

  - From and To Date

❧ **Settlement Token Additions**

Added a new Settlement letter token that can be inserted and used on any document in the Document manager, with label: "Settlement balance including expected late fees"

- **Token label when displayed on Document:**

[Settlement Letter.settlement_current_loan_incl_late_fees]

- **Calculation:**

This token will calculate a **single loan's settlement balance** as it would be for **5 days** in the **future** from today's date and include the late interest and late service fee due amounts, as it would be on **month end**.

The late fees will **only be added** if there are any **instalments overdue** on **today's** date. In addition, if the 5 days in future stretches over to the next month, then the late fees due amounts will be calculated as it would be for **the next month end**.
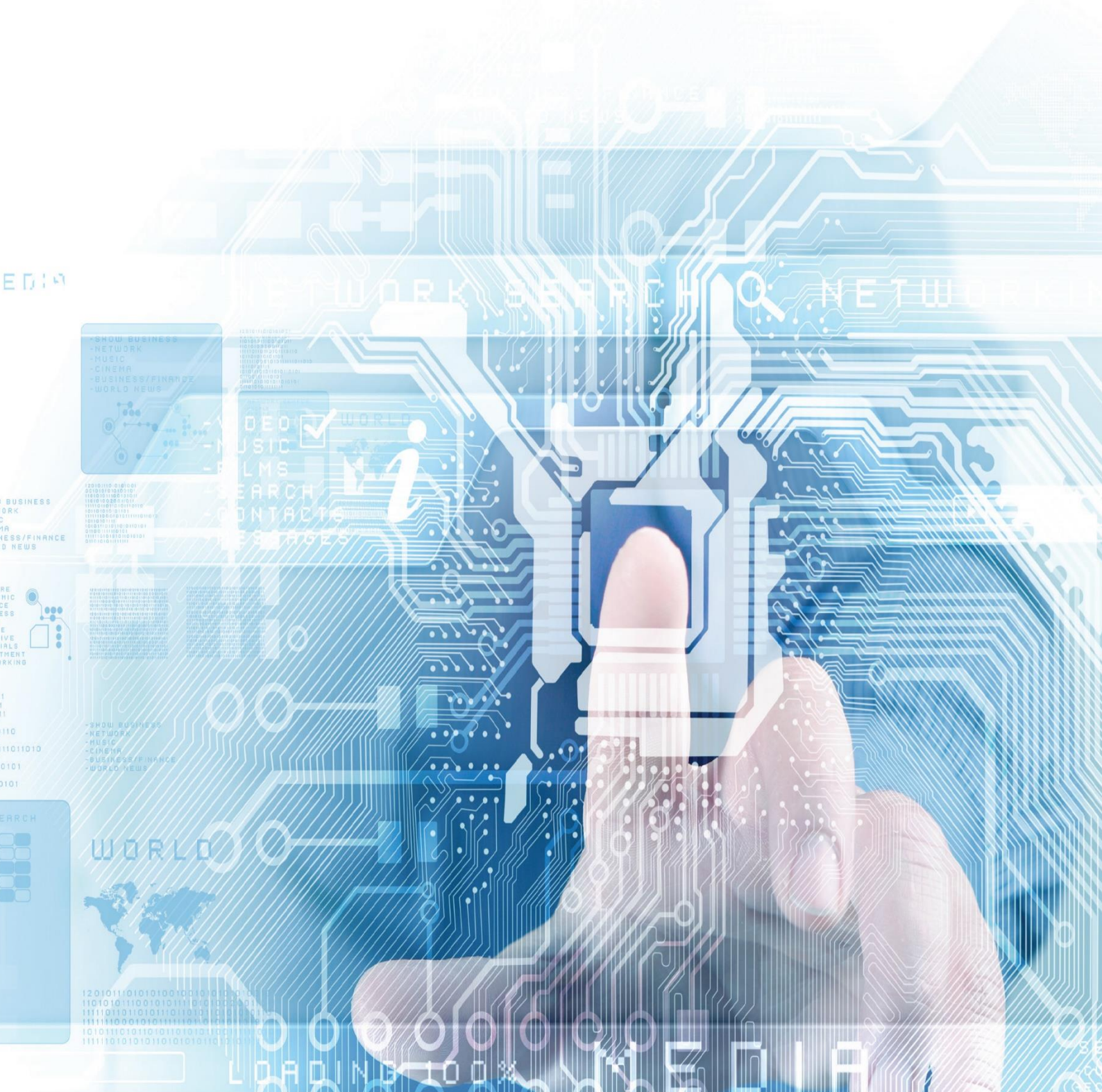
- **Adding Token***:*

You can add the token @ Setup > General > Document Manager > New/ Edit Document > Click on data field icon (▦) > Settlement Letter > Settlement balance including expected late fees:

End of Delfin V8.97 changelog

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