



# ***DELFIN CHANGELOG***

## **VERSION 8.98**

Release Date: 13/07/2021

**DELTER**

A DIVISION OF ALTRON



## CHANGES FROM VERSION 8.97

### Updates:

- ≈ Fixed an issue where newly added insurance types cannot be linked to a loan type as the user had to reload the setup window first. Now, a database refresh will occur when the loan type setup is loaded.
- ≈ Fixed an issue where the FEZA payout did not return a receipt after payout.
- ≈ CRBS registrations will now be managed via Delter's BacqOFS.
- ≈ Changed the UIA death claim process to not settle loan, keep loan active but continue with the other required submission processes.
- ≈ Changed the CS2 integration to submit the first payment date as recorded on the Loan's *Fdate* on the Loan table for the Start date and frequency parameters when registering loan.

### New Features & Enhancements in 8.98

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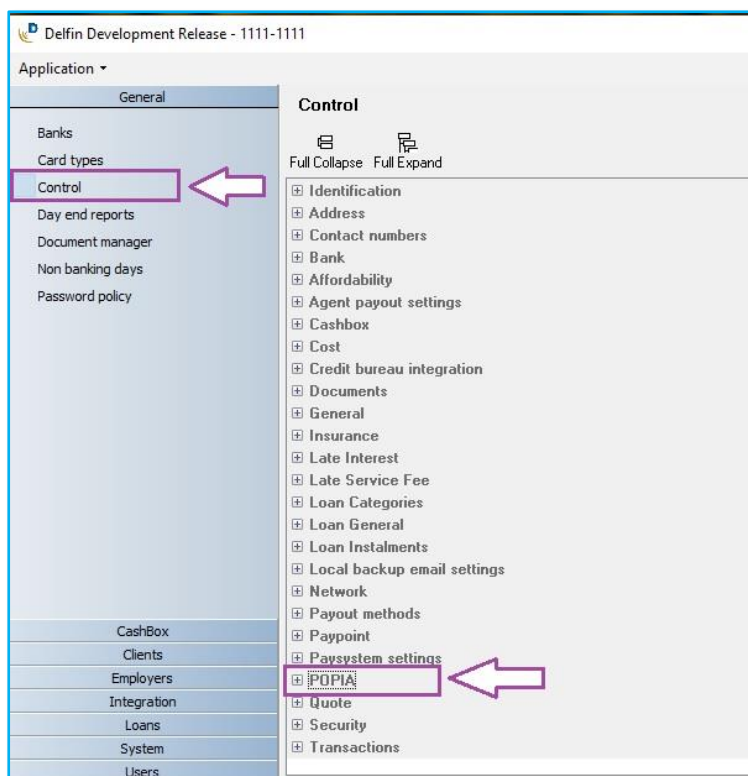


## 🔗 POPIA Consent

Added functionality that will allow a Merchant to setup POPIA consent for their clients.

### Setup:

The POPIA Consent module has been added to Application > Setup > General > Control > **POPIA**:



On expansion of the POPIA menu item, there are 3 parameters that can be set:

POPIA		
Active		✔
Reprompt days (0 = never)		30
Prompt		POPIA CONSENT EXAMPLE

- I. **Active** – To activate or deactivate the use of the POPIA Consent module.
- II. **Prompt days** – Every x number of days the prompt for consent should occur {0 - Will prompt only once and then never again per client}.
- III. **Prompt** – Text message that should be prompted on screen to user and client.

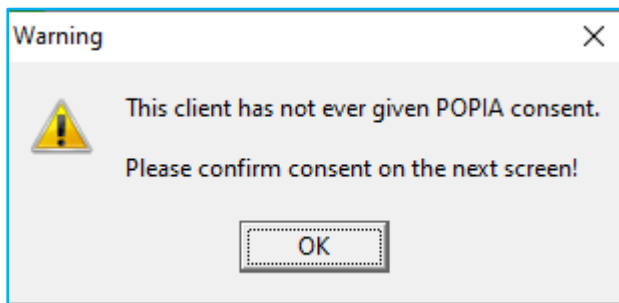


### **Consent Pop-up:**

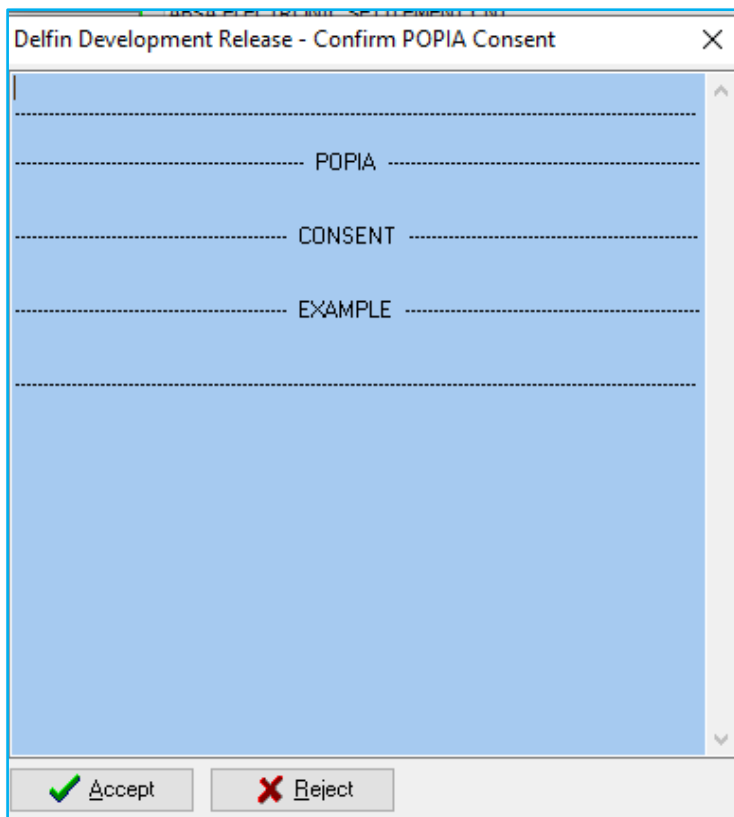
The consent will be initiated on the following 3 processes:

- **Edit Client** - {Will record consent once edit client is saved}
- **New Client** - {Will record consent once new client is saved}
- **New Loan**

If any of the above 3 processes are started the following message will display:



After **OK** button, your prompt message configured in the setup will display:

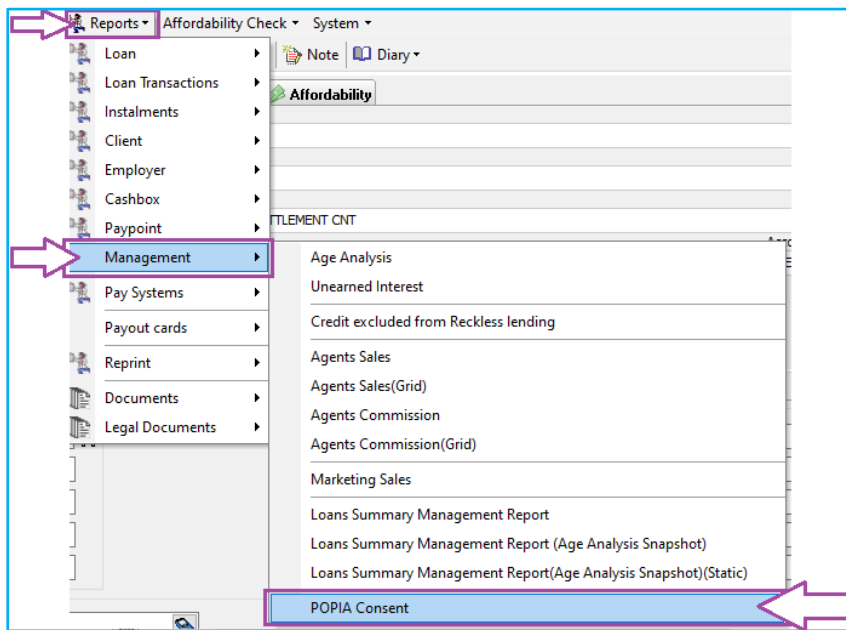




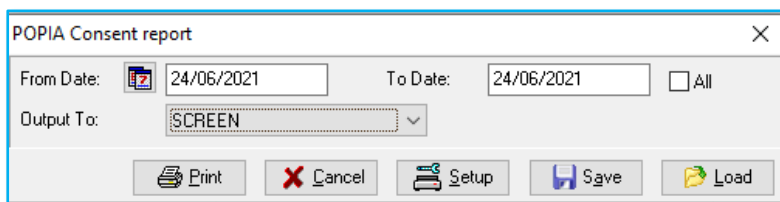
**Reports:**

A new report was added for the POPIA Consent module for merchants to have record of all the consents given over a selected period.

The report was added at Reports > Management > **POPIA Consent**:



There report has a **From** and **To** date filter, and Delfin's standard reporting functions:



Results will be displayed in Grid:

Client number	Operator	Consent timestamp	POPIA Message
58	Master_Tester	24.06.2021	POPIA Consent Example
57	Master_Tester	24.06.2021	POPIA Consent Example
55	Master_Tester	24.06.2021	POPIA Consent Example
54	Master_Tester	24.06.2021	POPIA Consent Example
52	Master_Tester	24.06.2021	POPIA Consent Example
51	Master_Tester	24.06.2021	POPIA Consent Example
50	Master_Tester	24.06.2021	POPIA Consent Example



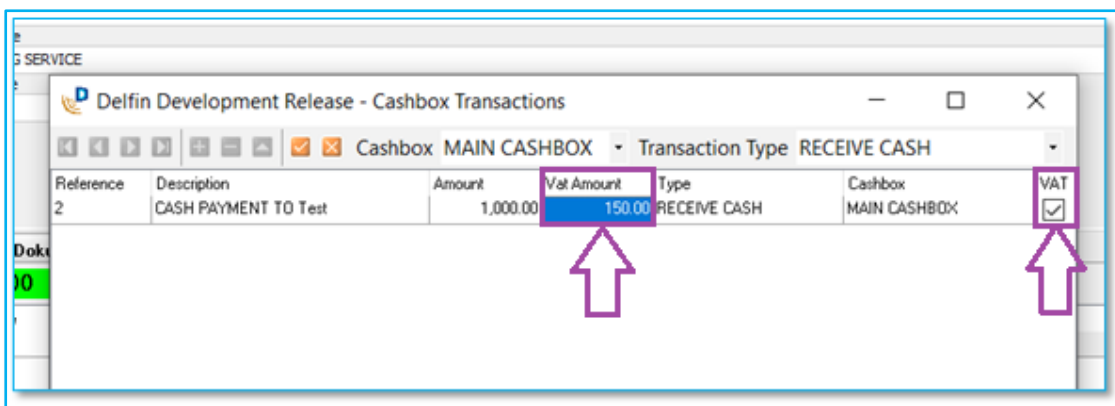


## VAT Breakdown on Cashbox

Additions have been made to the Cashbox Transactions to allow the VAT amount to be included.

### Transactions:

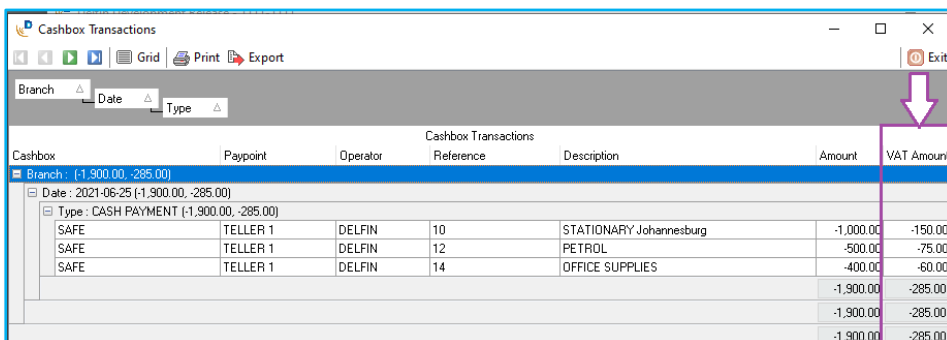
- Cashbox transactions now include a **Vat Amount** column which works in conjunction with the VAT tick-box:



- After an amount has been entered in the **Amount** column, VAT will be calculated on the amount if the VAT Tick has been ticked.
- The VAT amount is calculated based on the VAT rate which is set in the Setup. (*Application > Setup > General > Control > General > VAT rate*)
- If the VAT tick-box is not ticked, then **no** VAT will be calculated or added.
- The user can also input any custom value for the VAT amount to cater for partial Vat on an expense.

### Reports:

- The VAT Amount has also been added to both the Cashbox Transactions and Transactions (Grid) Reports.





### ☞ Delfin Printer Setup Permission

The following changes were made to the User's **general** permissions in Application > Setup > Users > General:

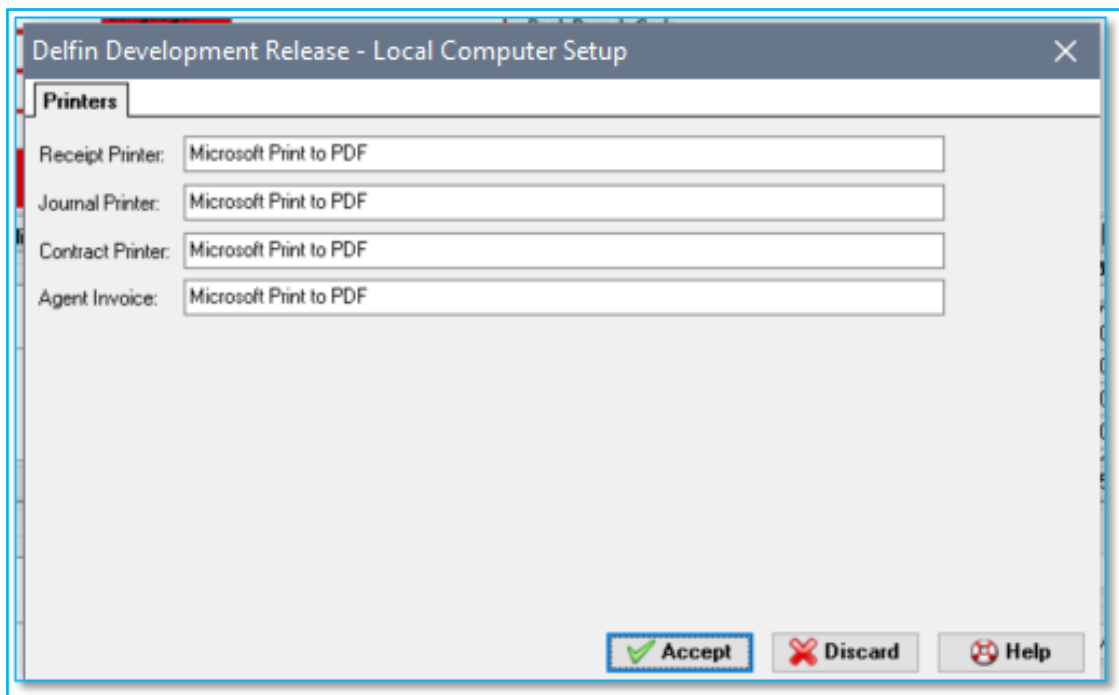
- Changed the current Local PC Setup permission to: **Local PC Setup – Integration**.
- Added a new permission: **Local PC Setup – Printer**.

Maintenance options this user can access	
Setup	✗
Employers	✓
Local PC Setup - Printer	✓
Local PC Setup - Integration	✗

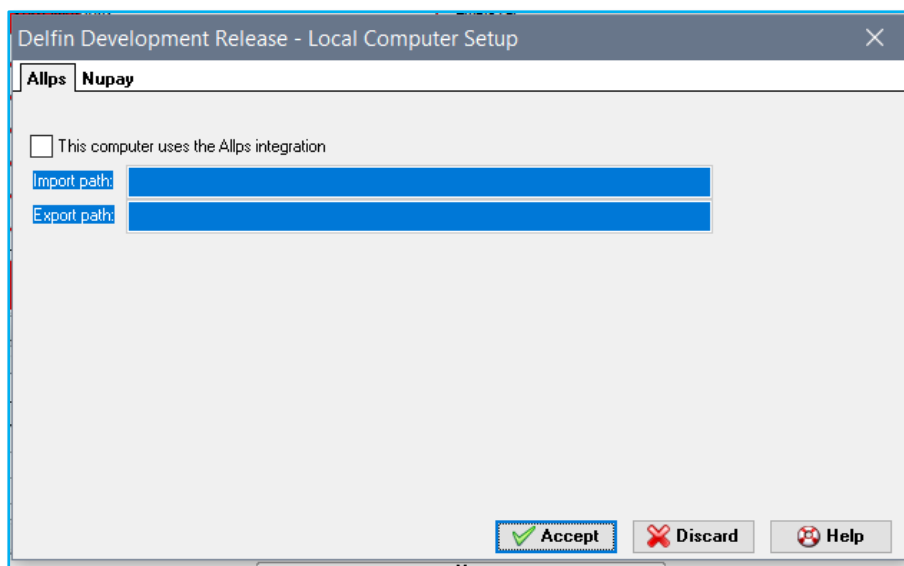
- On Update the system will default the **Local PC Setup - Printer** to:
  - ≈ **Active** if "Setup" permission is Active on a user.
  - ≈ **Inactive** if "Setup" permission is Inactive on a user.

*The Local PC Setup menu will be visible if either **Local PC Setup** permission is **Active***

- Modified the Local PC Setup window to:
  - Display printer tab only if **Local PC Setup - Printer** permission is **active** for the user.



- Display integration tabs (Allps & NuPay) only if **Local PC Setup - Integration** permission is **active** for the user.



### 🔗 Employer added to Transaction Grid Report

Added the client's Employer name to the Reports > Loan Transactions > **Transaction (Grid)** report.

File nr	ID number	Surname and Initials	Employer	Loan nr
Group type : JOURNAL				
Sub type : JOURNAL: NO LATE INTEREST CHARGED				
Nick name : DANE				
40053	80092656260	DC, F	TEST 1	11823 1
40053	80092656260	DC, F	TEST 1	11824 2
Nick name : JOHNNY				
40054	79110859630	DCF, F	INTEGRATION TEST	11658 3
Nick name : SDF				
40055	234234ASDF	ASDF, S	NUPAY ALBERTON	11875 1
40055	234234ASDF	ASDF, S	NUPAY ALBERTON	11875 1
40055	234234ASDF	ASDF, S	NUPAY ALBERTON	11876 0

- The Employer can be filtered on the search criteria (before report is executed) and can be grouped on the grouping pane (after report is executed).
- The Employer will also be included in the export either as a column or a group.





### ☞ **Multiple Credit Bureaus for Credit Checks:**

Added the functionality to allow credit checks on more than one Credit Bureau:

Credit Bureau Options	
Loan Amount:	1,000.00
Print enquiry	Search
Bureau:	Transunion
	Transunion
	Compuscan
	Vericred

*Please contact the Delter Support department to assist with setup and default bureau.*

### ☞ **Allps TT1 Realtime and Delayed**

Added in Allps' TT1 Realtime and Delayed integration.

#### **Setup:**

The Allps TT1 integration can be configured in Application > Setup > Integrations > Payment Systems > [Allps DebiCheck TT1](#).

*Please contact the Delter Support department to assist with the Allps TT1 integration setup*

### **New Loan Registrations:**

The Allps DebiCheck TT1 can be selected as a Repayment type on a client and during new loan registrations:

Loan	
Frequency:	MONTHLY
Number of Payments:	1
Capital Requested:	0.00
Interest Rate:	3.00
Interest Amount:	0.00 21
Initiation Fee:	0.00
Service Fee:	0.00
Vat:	0.00
First Instalment Date:	15/07/2021
Repayment Method:	.LPS Debicheck TT1
Last Instalment Date:	15/07/2021



## Authentication Type:

During the new loan registration process the Allps DebiCheck TT1 registration window will display where a user can select the standard payment system registration options and the **Authentication Type**:

You can also choose the tracking method if available.  
Click on the Cancel button to cancel the creation of this loan.  
Click on the OK button to continue creating this loan.

Required Action

Register now  
 Register later  
 Never register

Banking Details

Bank name: FIRST NATIONAL BANK  
Branch code: 200106 Branch name: CALVINIA, C.P.  
Account no: 123456788 Account type: CHEQUE

Tracking: No Tracking  
Auth Type: Delayed  
Delayed  
Realtime

Accept Discard Help

## Realtime:

The **Realtime** process if selected, will require an immediate authentication from the consumer. Delfin will wait for the response during the registration process.

- If the Merchant **rejects** authentication, then the loan can be declined,
- If the Merchant **accepts** authentication, then the loan will be registered with Allps and automatically set the loan to an “Active” status once other required processes are completed successfully.

## Delayed:

The **Delayed** process if selected, will register the loan with Allps, finish the initial registration process and set the loan to an “**Approved**” status. The consumer can then Attempt to “**Payout**” the loan on Delfin, in this step, Delfin will check the status on Allps and if the loan contract was rejected or accepted by the consumer.

Loan nr	Type	Balance	Overdue
11861	SHORT TE	1,852.25	0.00
11872	SHORT TE	4.05	0.00
11874	SHORT TE	6.02	0.00

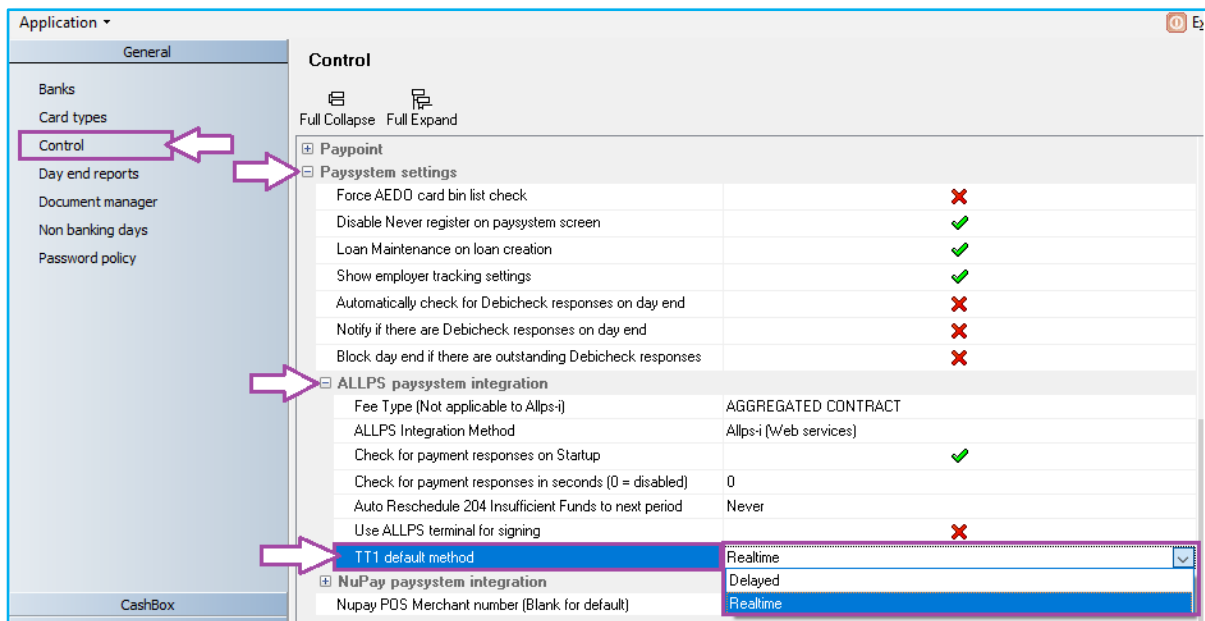
Approve  
Decline  
Payout

- If the Merchant **rejects** authentication, then the loan can be declined,
- If the Merchant **accepts** authentication, then the loan will be automatically set the loan to an “Active” status once other required processes are completed successfully.

- The merchant can also fail to authenticate the loan within the bank time limits, and thus the authentication will be **expired**, and the loan can be declined.

### Default Auth Type:

The default authentication type can be configured in the setup at Application > Setup > General > Control > Paysystem settings > Allps paysystem integration > **TT1 default method**:



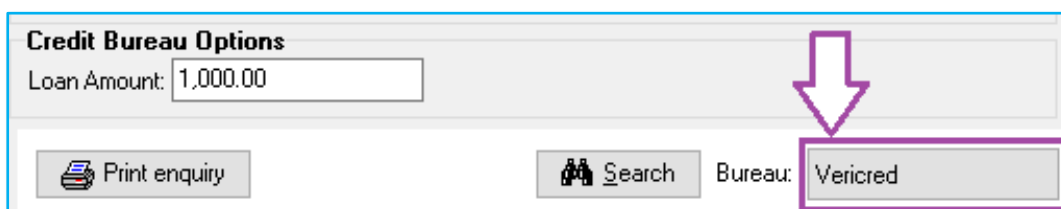
### VeriCred Integration



Implemented the VeriCred Credit Bureau integration.

### Credit Check:

- A user can now perform VeriCred, credit Checks in Delfin:

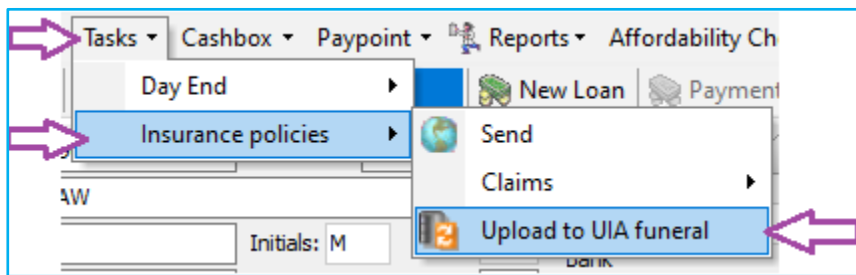


- Stores the following data on the client:
  - **Query Done By** - User that performed the credit check.
  - **Query Done On** - Date and time the credit check was done.
  - **Query Number** - Reference number of the transaction ID.

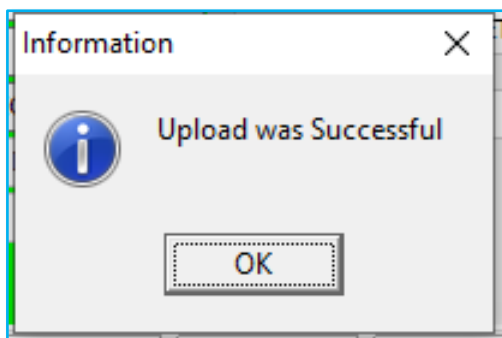
*Please contact the Delter Support department to assist with the VeriCred integration setup*

### UIA Funeral API

- Developed UIA's Funeral API for Delfin that will send all relevant client data to UIA. The trigger to send the client's details has been added to Tasks > Insurance Policies > **Upload to UIA Funeral**:



- A response message will be displayed on the result of the submission to UIA:



*The button will only be available if the insurance setup is Set to **Universal Insurance***

## **End of Delfin V8.98 changelog**

