



WEBFIN CHANGELOG

VERSION 3.0.0

RELEASE DATE:15/11/2021

DELTER

A DIVISION OF ALTRON



CHANGES FROM VERSION 2.31

Bugs Fixed:

- » Fixed a bug where there was an error when a user makes a credit check on a new client.
- » Fixed a bug where documents replaced older documents of the same type.
- » Fixed a bug where the receipt document did not display after payment.
- » Fixed a bug where client loan errors when opening for the second time.

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Enhancements in V3.0.0:

🔗 Implemented Firebird 4

Implemented the Firebird 4 upgrade to the Webfin database. This will allow for using all the new technologies surrounding it which includes general speed improvements on reporting and other loading processes.





🔗 Improved Client Search screen

A few changes have been made to the client search screen which is another contributing factor to the general speed optimization of Webfin processes in the new version:

- » Modified the screen to make it easier to understand how to use the filters.
- » The preloading of the client list has been removed; the user must first apply filters to load clients.
- » Moved the Loan Number search bar to the bottom of the screen.
- » Removed Select Client button (double click on the client to select).

The screenshot shows the 'Client Search' window. At the top, there is a 'Back' button and the title 'Client Search'. Below the title, there is a prompt: 'Please enter one or more filters to search client'. To the right of this prompt are two buttons: 'New Client' and 'Credit Enquiry'. Below the prompt is a table with the following columns: Global File No., Branch File No., Branch, Surname, First Name, ID number, Employer, Emp No., Balance, and Status. The table is currently empty. Below the table, there is a message: 'No data to display'. At the bottom of the window, there is a 'Loan number' search bar and a 'Search Loan' button. The window also has a 'Close' button in the top left corner.

New Features in V3.0.0:

🔗 Insurance Tokens

New insurance tokens have been added for loan and insurance documents on the total repayment of the loan. The insurance tokens have been added to Setup > General > Document Management > Document Editor > Tokens. Please see the added tokens below:

The screenshot shows the 'Document Tokens' dialog box. It has a 'Close' button in the top left corner. Below the button is a search bar with the text 'Looking for'. Below the search bar is a list of tokens: REPAYMENT_+250, REPAYMENT_X2, REPAYMENT_X2_+500, REPAYMENT_X3, REPAYMENT_X3_+750, REPAYMENT_X4, and REPAYMENT_X4_+1000.



The above depicted tokens are explained further below in that order:

- » Repayment total plus R250
- » 2 Times repayment total
- » 2 Times repayment total plus R500
- » 3 Times repayment total
- » 3 Times repayment total plus R750
- » 4 Times repayment total
- » 4 Times repayment total plus R1000

Predefined Documents

The new Predefined Documents feature will allow you to create a template document that can be printed at any time for any client and loan, for example a custom Paid Up Letter or a Settlement letter etc.

You can create these documents in the Document Manager in the Webfin Setup > General > Document Management.

When adding a new document select category type: **Predefined Documents**:

- » Users can name the predefined documents with any name they prefer.
- » Once this predefined document has been added, it will be displayed on the list of documents and any token can be added to the document using the “Edit Document Wording” button at the bottom of the screen. Please see the screen shot below:

Document Management	
Document category	Document name
Predefined Documents	Predefined Loans test
Receipt	Default Receipt
Refund	Default Refund Document
Section 129	Sec129
Settlement Quote	Test
Webloan document	Declaration
Webloan document	Privacy
Webloan document	T&C
Webloan document	Terms and conditions
Webloan email template	Accept
Webloan email template	Branch notification
Languages for Predefined Loans test	
<input type="button" value="Add language"/> <input type="button" value="Remove language"/> <input type="button" value="Edit document wording"/>	



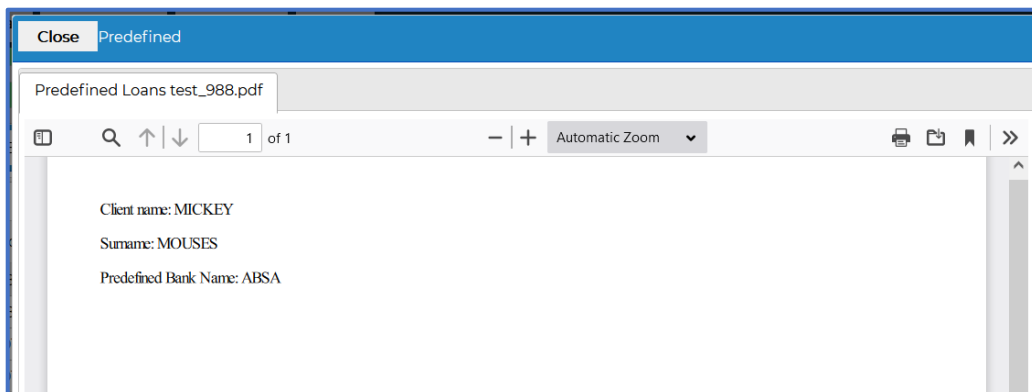
- » The predefined document can be printed on Client > Detailed Loan View
- » A user must select a loan to successfully print the predefined document:

Detailed Loan View				
Print Document				
Back				
Loans Transactions Schedule Audit trail Affordability				
No	Type	Status	Last paid	First date
988	SHORT	PAID	24/12/2019	25/12/2019
989	DC TT1	DECLINED		25/12/2019
1017	SHORT	ACTIVE	27/07/2020	31/01/2020

- » Once a loan is selected, the document can be printed by clicking the “Print Document” button and Print Document Screen will pop up:

Print Document	
Cancel Print	
Document:	Predefined Loans test

- » If the user has more than one document, they can select whichever document they want to print using the dropdown menu.
- » When the “Print” button is clicked, the document will pop up in a separate window as depicted in the screen shot below:



- » The predefined document is also saved on the documents tab on the client’s profile page.



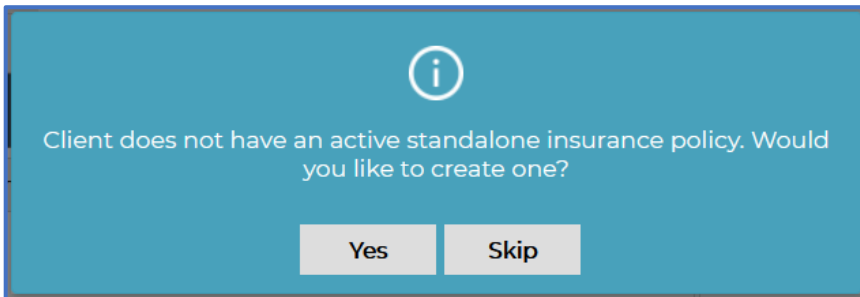
🔗 Standalone Module

The new Standalone module will enable users the ability to grant insurance policies that is not linked to a loan.

🔗 Setup

To Setup and activate the Standalone module.

- » The Standalone module must first be activated on the Setup > Branch Setup > Integrations > PAS.
- » The PAS URL, Username and Password as set on PAS must be entered here.
- » Force on new loan [ON/Off] – This will perform a check when the new loan process is initiated if the Client has an active Standalone policy or not. The Standalone policy can be forced, depending on the user permissions set. When a user clicks on the New Loan button on the client’s profile, the following message box will pop up:



- » If a user clicks “Yes”, the “Create New Standalone Policy” screen will pop up.
- » If a user has the permission to skip the creation of a new policy, they can proceed with a new loan creation. Should the user not have the permission to skip the creation of a policy, the “Skip” button will not be available on the message box.
- » The user must click “Verify and Sync” button to retrieve all integrated products, should standalone insurance product be active, it will be displayed as shown in the screen below:

Please contact Delter’s Support Department to assist with Setup



🔗 User Permissions

Added Standalone User Permissions to the general user type permission set @ Setup > User > User Type:

Back Save Edit user type

Type Description: OWNER

- Integrations
- Capture mode
- Employer
- Fingerprint
- Section 129
- Insurance
- Overrides
- Notifications
- Credit Bureau Admin
- Standalone Insurance
 - Can Grant
 - Can Cancel
 - Can Skip New Loan Check

- » *Can Grant* – This permission allows a user to create a standalone insurance policy. If this user permission is inactive, they will not be able to create a policy
- » *Can Cancel* – This permission allows a user to cancel an existing policy on a client’s profile.
- » *Can Skip New Loan Check* – Checks if a user has an active standalone policy on new loan creation. If a user has this permission active, they can proceed with creation of the loan and if not, the user will be forced to create a Standalone policy first.

🔗 Standalone Module Client View

Added a new tab on the client’s profile screen for the Standalone module. Here the user will be able to create and cancel and view detail on the active Policy. Only 1 Policy can be active per client. This tab will only be visible if standalone integration is enabled.

- » The “Standalone” tab is on Clients > Standalone:

Loan	Client	Bank	Employment	Documents	References	Payout options	VoIP Call Logs	Standalone	
Create Policy		Cancel Policy							
Policy Name	Granted Date	Last Paid Date	Pay Day	Reference	Nupay Mandate ID	Nupay Provider	Status	Amount	



- » The user must click on the “Create Policy” button to create a new standalone policy.
- » The below screen will pop up and allow the user to create a new policy:

Cancel
Register policy
Create new standalone policy

Active products: Repay method:

Repay Tracking:

Standalone Beneficiaries: 0 beneficiaries added

- » The user must select policy information on the above screen to successfully create a standalone insurance policy.
- » Active Products – these are standalone insurance policies that have been setup on Delter’s Central Product Add-on Server (PAS).
- » Repay Tracking – tracks unsuccessful payments for the specified tracking days on the client’s bank account.
- » Repay Method – this the repayment method used to pay the policy which will include:
 - NuPay TT1 Realtime
 - NuPay TT3 CS2 and TCC
- » To successfully add Standalone Beneficiaries, the user must have selected an Active Product.
- » To add Standalone Beneficiaries, the user must click on the plus sign and a section to add beneficiary details will be expanded as shown in the screen shot below: (The Number of beneficiaries is set on PAS per product)

Cancel
Register policy
Create new standalone policy

Active products: Repay method:

Repay Tracking:

Standalone Beneficiaries: 3 of 3 beneficiaries

Name	Surname	Date of birth	Relationship
<input type="text" value="tbone"/>	<input type="text" value="tbone"/>	<input type="text" value="12/01/2016"/>	<input type="text" value="Child"/>
<input type="text"/>	<input type="text"/>	<input type="text" value="01/01/1900"/>	<input type="text" value="Spouse"/>
<input type="text"/>	<input type="text"/>	<input type="text" value="01/01/1900"/>	<input type="text" value="Spouse"/>



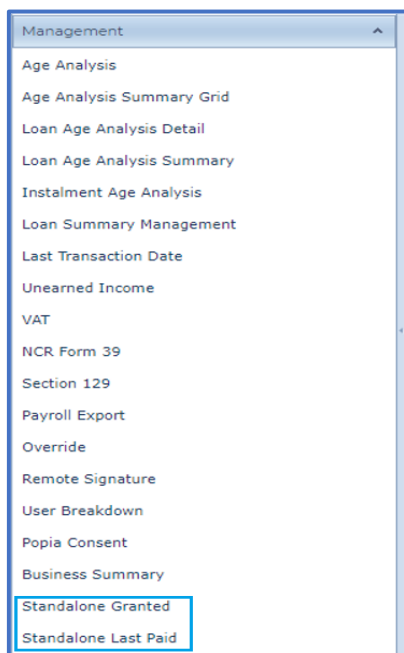
» Once a policy has been created, it will be displayed as shown in the screenshot below:

Loan Client Bank Employment Documents References Payout options VoIP Call Logs Standalone								
Create Policy		Cancel Policy						
Policy Name	Granted Date	Last Paid Date	Pay Day	Reference	Nupay Mandate ID	Nupay Provider	Status	Amount
loko test	03/11/2021	19/09/2021	25		5941400	NUPAY.TTI	Active	1.00

» The user can cancel the policy by clicking on the “Cancel Policy” button on if they have the permission to cancel a policy.

🔗 Standalone Reporting

- » Two new reports have been added to display granted policies along with their state per branch. The two reports are
 - Standalone Granted and
 - Standalone Last Paid
- » Both reports are on Reports > Management:



🔗 Standalone Granted Report

The Standalone Granted report can be filtered by:

- Branch
- Granted From Date
- Granted To Date
- Policy Status (Active, Arrears, Lapsed, Cancelled)



Report Parameters

Report Filter

Branch: Testing Branch Setup,Branch 1,Branch 2,Branch 3,Branch 4,Bra... All

Granted From Date: 03/10/2021 Granted To Date: 05/11/2021

Policy Status: All

Active

Arrears

Lapsed

Cancelled

» Once the user has filtered the report accordingly, they can click on the tick button and run it. The below screen will load, and display report data depending on the granted dates selected on the filters as depicted in the screen shot below:

Export to Excel Print Send Bulk SMS

Branch x

Branch	Serial	Insurer	Product	Status	Id No	Name	Surname	Granted	Last Paid	Paydate	Reference
Branch: Branch 1 (58)											
Bran...	1111-0001	NuCover	NuCover 7500	Active	12345678999	PRUDENCE	BALOYI	22/10/2021	22		
Bran...	1111-0001	NuCover	NuCover 7500	Cancelled	36987112253	PRUDENCE	BALOYI	14/10/2021	25		
Bran...	1111-0001	NuCover	NuCover 15000	Cancelled	12233658996	PRUDENCE	BALOYI	20/10/2021	22		
Bran...	1111-0001	NuCover	NuCover 25000	Cancelled	1258975521	PRUDENCE	BALOYI	21/10/2021	22		
Bran...	1111-0001	Test Ins	Standalone for Test Ins	Cancelled	1458658865	THEMBA	BA	11/10/2021	25		
Bran...	1111-0001	Test Ins	Standalone for Test Ins	Cancelled	2568545478	THEMBA	BA	11/10/2021	25		

- » The report can be exported to excel.
- » The user can send bulk SMSes to clients.

🔗 Standalone Last Paid

- » The Standalone Granted report can be filtered by:
 - Branch.
 - Last Paid From Date.
 - Last Paid To Date.
 - Policy Status (Active, Arrears, Lapsed, Cancelled)

Report Parameters

Report Filter

Branch: Testing Branch Setup,Branch 1,Branch 2,Branch 3,Branch 4,Bra... All

Last Paid From Date: 25/07/2021 Last Paid To Date: 10/11/2021

Policy Status: All

Active

Arrears

Lapsed

Cancelled



- » Once the user has filtered the report accordingly, they can click on the tick button and run it. The below screen will load, and display report data depending on the last paid dates selected on the filters as depicted in the screen shot below:

Export to Excel		Print		Send Bulk SMS							
Branch x											
Branch	Serial	Insurer	Product	Status	Id No	Name	Surname	Granted	Last Paid	Paydate	Reference
Select	Selec	Select Filter	Select Filter	Select Fi							
▼ Branch: Testing Branch Setup (3)											
Testing Br...	1111-1111	Test Ins	loko test	Arrears	12345678	NHLA	BUKO	09/11/2021	25/09/2021	16	
Testing Br...	1111-1111	Test Ins	loko test	Cancelled	58985552	NHLA	BUKO	03/11/2021	19/09/2021	25	
Testing Br...	1111-1111	Test Ins	loko test	Cancelled	58798723	NHLA	BUKO	05/11/2021	21/09/2021	25	
▼ Branch: Branch 5 (2)											
Branch 5	1111-0005	Delfin Standalone	Funeral Cover	Pending	89452595	THORIN	NSHIELD	15/08/2021	16/09/2021	26	Thabiso Test
Branch 5	1111-0005	Test Ins	Standalone for Test Ins	Active	25454126	TEST	ER	30/08/2021	12/09/2021	20	report test

- » The report can be exported to excel.
- » The user can send bulk SMSs to clients.

End of Webfin V3.0.0 Changelog



NETWORK SEARCH NETWORK

- SHOW BUSINESS
- NETWORK
- MUSIC
- CRIME
- BUSINESS/FINANCE
- WORLD NEWS

- VIDEO WORLD
- MUSIC
- FILMS
- SEARCH
- CONTACTS
- PAGES

- SHOW BUSINESS
- NETWORK
- MUSIC
- CRIME
- BUSINESS/FINANCE
- WORLD NEWS

WORLD

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LOADING 100% MEDIA

DELTER

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