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.

Enhancements and New Features in V3.0.0:

Enhancements in V3.0.0:

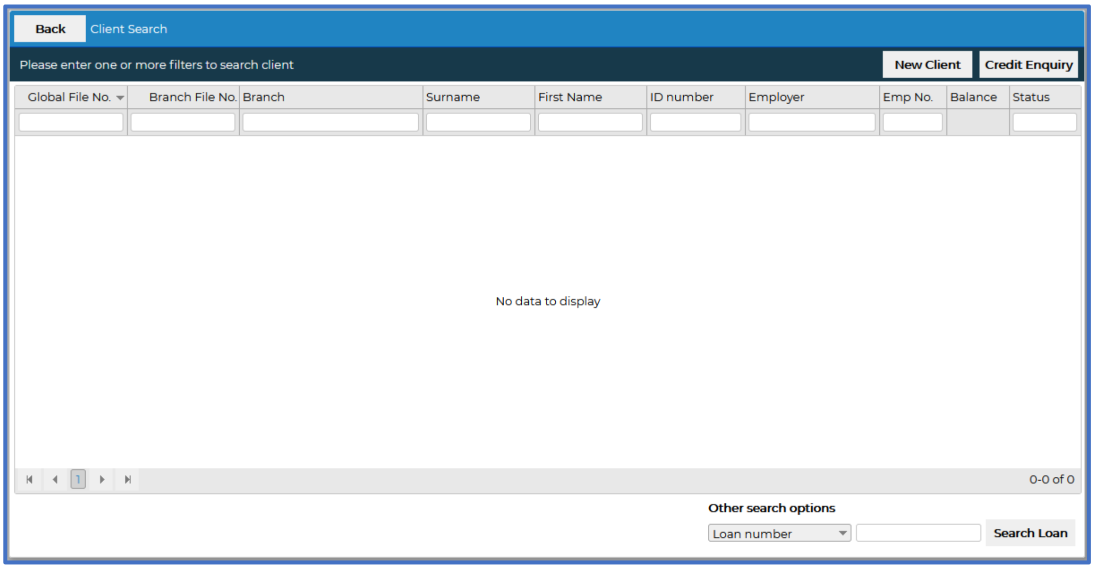
Implemented Firebird 4

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:

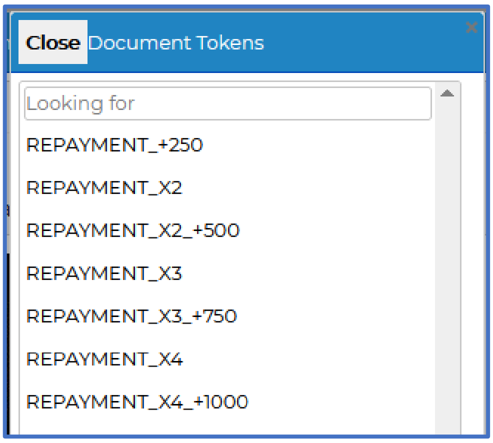
- Modified the screen to make it easier to understand how to use the filters.
- The preloading of the client list has been removed; the user must first apply filters to load clients.
- Moved the Loan Number search bar to the bottom of the screen.
- Removed Select Client button (double click on the client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



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 above depicted tokens are explained further below in that order:

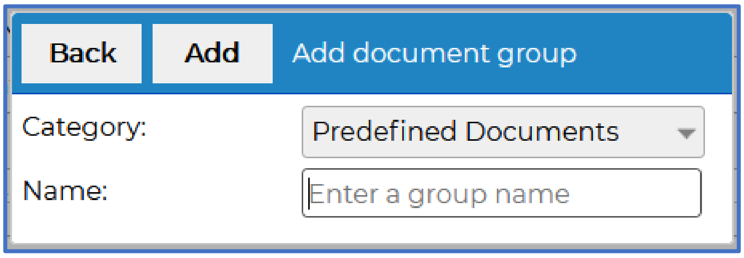
- » Repayment total plus R250
- » 2 Times repayment total
- » 2 Times repayment total plus R500
- » 3 Times repayment total
- » 3 Times repayment total plus R750
- » 4 Times repayment total
- » 4 Times repayment total plus R1000

Predefined Documents

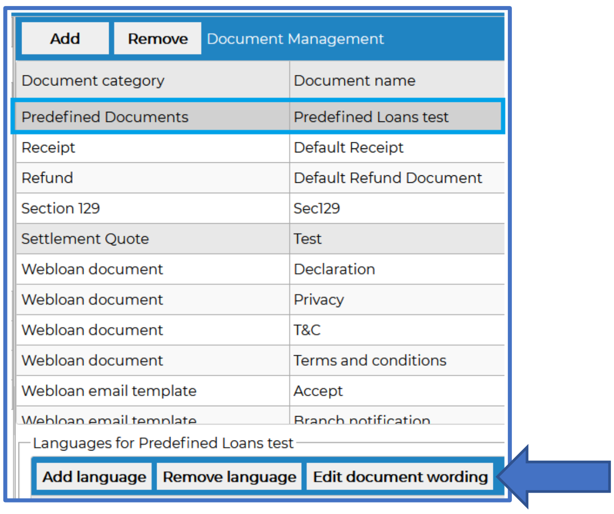
The new Predefined Documents feature will allow you to create a template document that can be printed at any time for any client and loan, for example a custom Paid Up Letter or a Settlement letter etc.

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

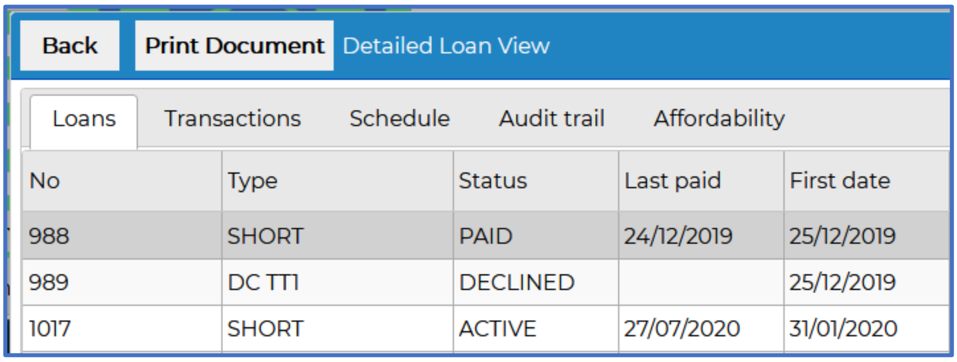
When adding a new document select category type: **Predefined Documents**:



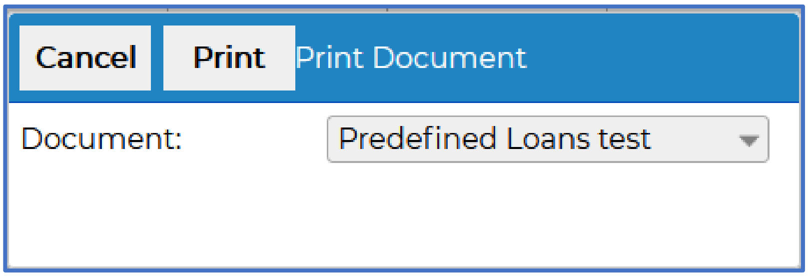
- » Users can name the predefined documents with any name they prefer.
- » Once this predefined document has been added, it will be displayed on the list of documents and any token can be added to the document using the "Edit Document Wording" button at the bottom of the screen. Please see the screen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



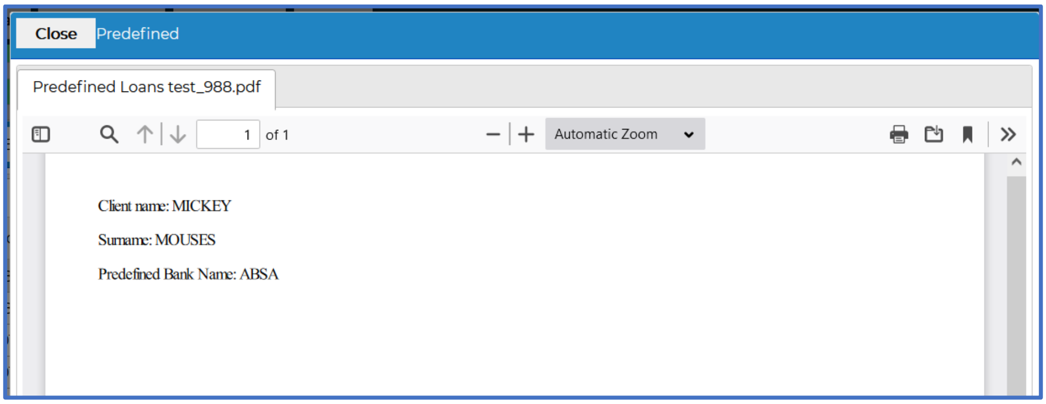
- The predefined document can be printed on Client > Detailed Loan View
- A user must select a loan to successfully print the predefined document:



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



- 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 is 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.

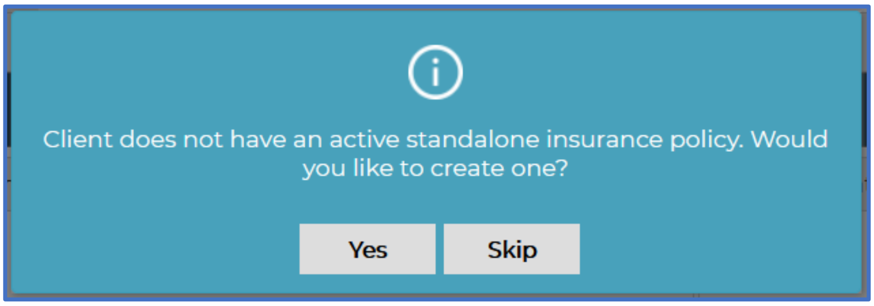
Standalone Module

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

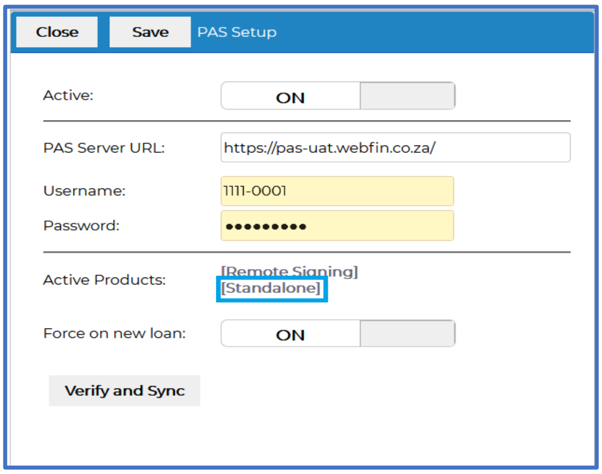
Setup

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:



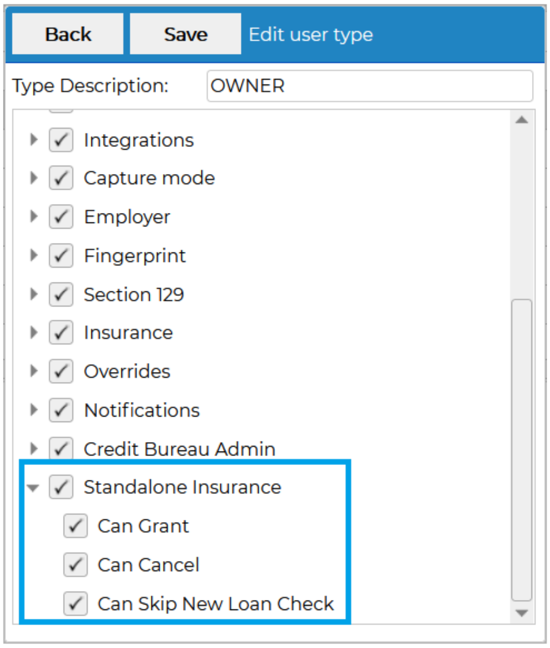
- If a user clicks "Yes", the "Create New Standalone Policy" screen will pop up.
- If a user has the permission to skip the creation of a new policy, they can proceed with a new loan creation. Should the user not have the permission to skip the creation of a policy, the "Skip" button will not be available 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:

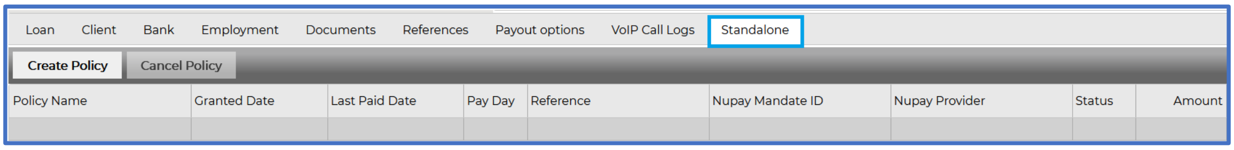


- *Can Grant* – This permission allows a user to create a standalone insurance policy. If this user permission is inactive, they will not be able to create a policy
- *Can Cancel* – This permission allows a user to cancel an existing policy on a client's profile.
- *Can Skip New Loan Check* – Checks 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.

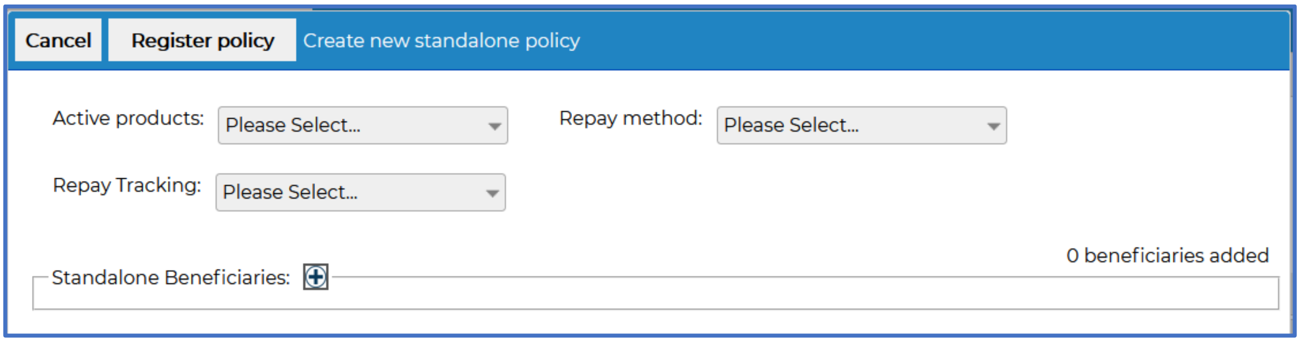
Standalone Module Client View

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:



» 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:



» The user must select policy information on the above screen to successfully create a standalone insurance policy.

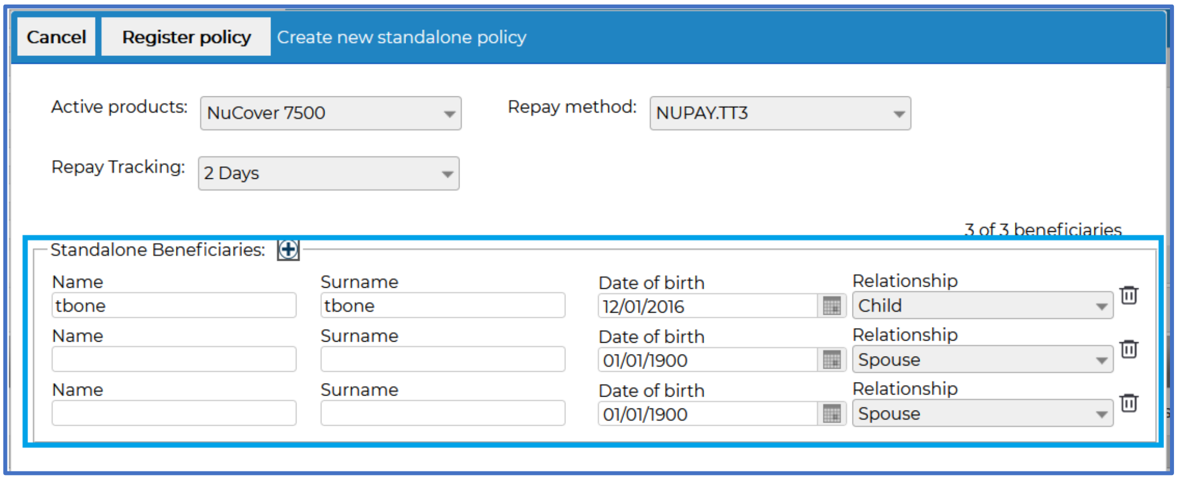
» Active Products – these are standalone insurance policies that have been setup on Delter’s Central Product Add-on Server (PAS).

» Repay Tracking – tracks unsuccessful payments for the specified tracking days on the client’s bank account.

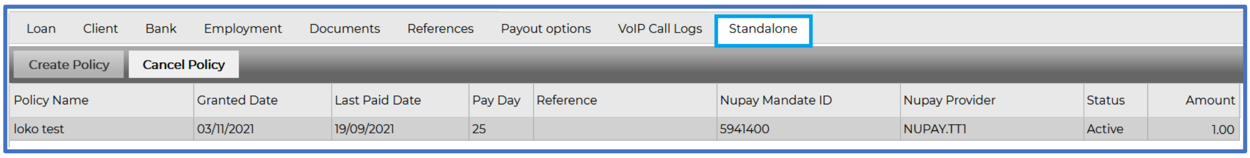
» Repay Method – this the repayment method used to pay the policy which will include:
  - NuPay TT1 Realtime
  - NuPay TT3 CS2 and TCC

» 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)



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



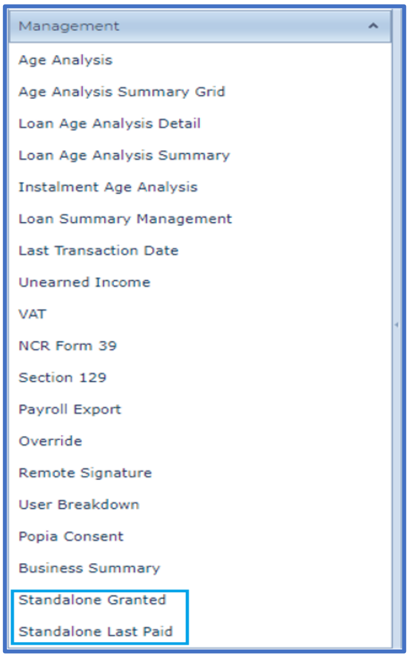
Policy Name	Granted Date	Last Paid Date	Pay Day	Reference	Nupay Mandate ID	Nupay Provider	Status	Amount
loko test	03/11/2021	19/09/2021	25		5941400	NUPAY.TT1	Active	1.00

» 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

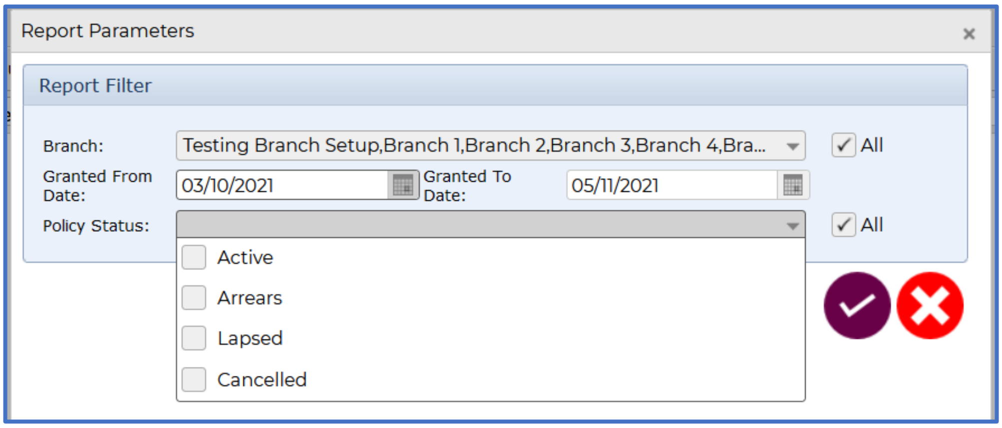
» Both reports are on Reports > Management:



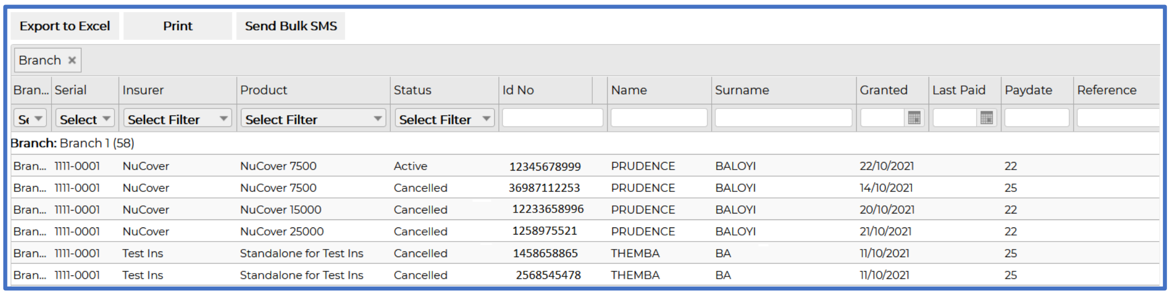
Standalone Granted Report

The Standalone Granted report can be filtered by:

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



» 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 ×

Bran...	Serial	Insurer	Product	Status	Id No	Name	Surname	Granted	Last Paid	Paydate	Reference
Se	Select	Select Filter	Select Filter	Select Filter							
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	

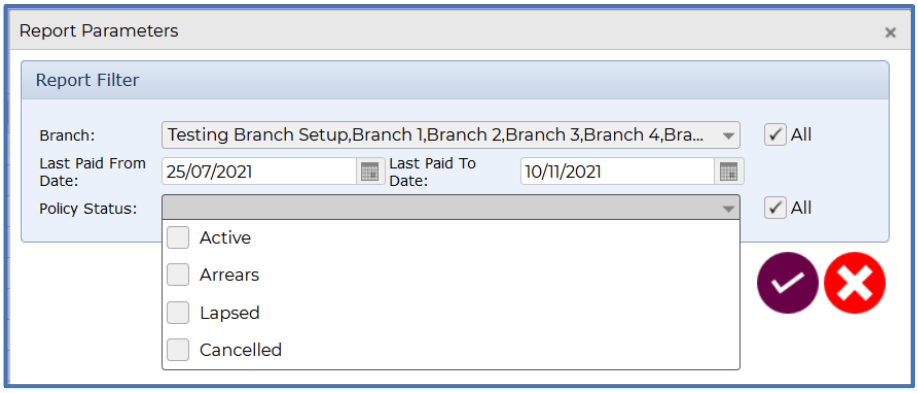
» The report can be exported to excel.

» 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)



» 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 ×

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	Ioko test	Arrears	12345678	NHLA	BUKO	09/11/2021	25/09/2021	16	
Testing Br...	1111-1111	Test Ins	Ioko test	Cancelled	58985552	NHLA	BUKO	03/11/2021	19/09/2021	25	
Testing Br...	1111-1111	Test Ins	Ioko 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

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