



WEBFIN CHANGELOG

VERSION 3.1.1

Release Date: 13/05/2022

DELTER

A DIVISION OF ALTRON



CHANGES FROM VERSION 3.1.0

Updates:

- ∞ Updated the CS2 string for NuPay DebiCheck Mandate registrations to send:
 - **Usage Based** as the *Debit Value Type ID*, and
 - **Instalment Value * 1.5** as the *Max Collection Amount*.

Enhancements and New Features in V3.1.1:

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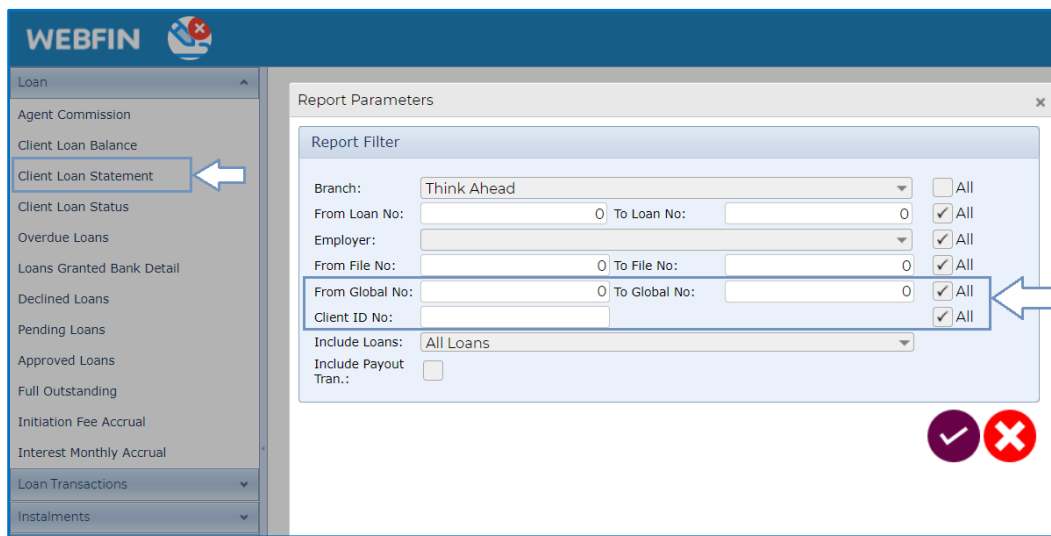


Enhancements

➤ Added Filters for the Client Loan Statement

The following two additional filters were allocated to the Loan > Client Loan Statement:

- 1) **From Global No** and **To Global No** – {Will filter on the client’s global file number}
- 2) **Client ID No** – {Will filter on the client’s identification number}



➤ Removal of a Three-Month Budget Item

Added in the functionality to remove a three-month budget item in the setup:

Name	Active	Category	Exception Category	Average Only
GROSS INCOME	<input checked="" type="checkbox"/>	Income	OTHER	<input checked="" type="checkbox"/>
BONUS INCOME	<input checked="" type="checkbox"/>	Income	OTHER	<input type="checkbox"/>
OTHER INCOME	<input checked="" type="checkbox"/>	Income	OTHER	<input type="checkbox"/>
PAYE	<input checked="" type="checkbox"/>	Statutory deductions	OTHER	<input type="checkbox"/>
UIF	<input checked="" type="checkbox"/>	Living expenses	OTHER	<input type="checkbox"/>
INSURANCE	<input checked="" type="checkbox"/>	Statutory deductions	OTHER	<input type="checkbox"/>
TRANSPORT	<input checked="" type="checkbox"/>	Living expenses	OTHER	<input type="checkbox"/>
GROCERIES	<input checked="" type="checkbox"/>	Living expenses	OTHER	<input type="checkbox"/>
LOAN REPAYMENTS	<input checked="" type="checkbox"/>	Existing debt obligations	OTHER	<input type="checkbox"/>
CREDIT CARD PAYMENT	<input checked="" type="checkbox"/>	Existing debt obligations	OTHER	<input type="checkbox"/>
MARITAL MAINTENANCE	<input checked="" type="checkbox"/>	Living expenses	OTHER	<input type="checkbox"/>
TELEPHONE/ CELLPHONE	<input checked="" type="checkbox"/>	Living expenses	OTHER	<input type="checkbox"/>
OVERTIME	<input checked="" type="checkbox"/>	Income	OTHER	<input type="checkbox"/>
MUNICIPAL SERVICES	<input checked="" type="checkbox"/>	Living expenses	OTHER	<input type="checkbox"/>
SCHOOL FEES	<input checked="" type="checkbox"/>	Living expenses	OTHER	<input type="checkbox"/>
HIRE PURCHASE INTSALMENTS	<input checked="" type="checkbox"/>	Existing debt obligations	OTHER	<input type="checkbox"/>
CLOTHING	<input checked="" type="checkbox"/>	Living expenses	OTHER	<input type="checkbox"/>
TESTING EXPENSE	<input checked="" type="checkbox"/>	Income	OTHER	<input type="checkbox"/>
CURRENT LOANS PAYMENT DUE	<input checked="" type="checkbox"/>	Existing debt obligations	OTHER	<input type="checkbox"/>

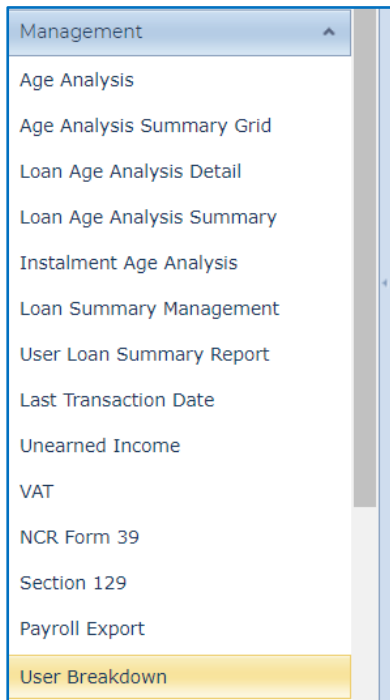
Remove button – Will remove the selected field in the grid and for all new applications. A field cannot be removed when it’s:

- **Highlighted in Red.** These fields are system required fields and cannot be removed.
- Any field which contains a stored value, captured on a client’s profile.




Global File ID to User Breakdown

The client's Global File ID was added to the User Breakdown report located at Reports > Management > **User Breakdown**:



The column and row data will be displayed after the **File no** column on the grid results:

Export to Excel		Print		
User x				
User	Branch Details			
	Branch name	File no	Global file no	Client name
<input type="text"/>	Select Filter 	<input type="text"/>	<input type="text"/>	<input type="text"/>

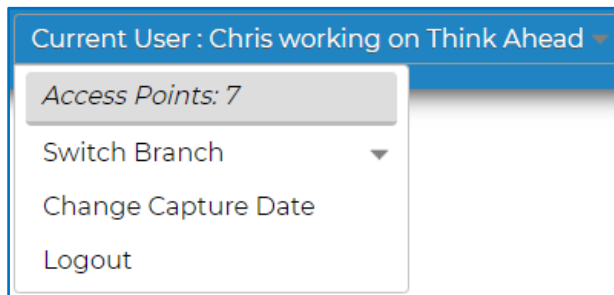
A blue arrow points down to the 'Global file no' column header.



New Features in V3.1.1

View of Access Points

Your total number of Access Points has been added to Webfin's main header dropdown menu located at the top right:

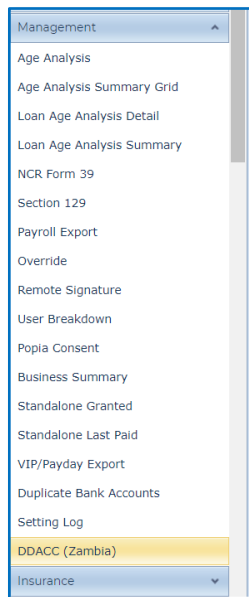


Access Points are the number of users that may transact simultaneously on your Webfin.

Please contact the Delter Accounts department to assist with any Access Point changes

DDACC Report for Zambia

Added the Direct Debit and Credit Clearing (DDACC) report for Zambia to Reports > Management > **DDACC (Zambia)**

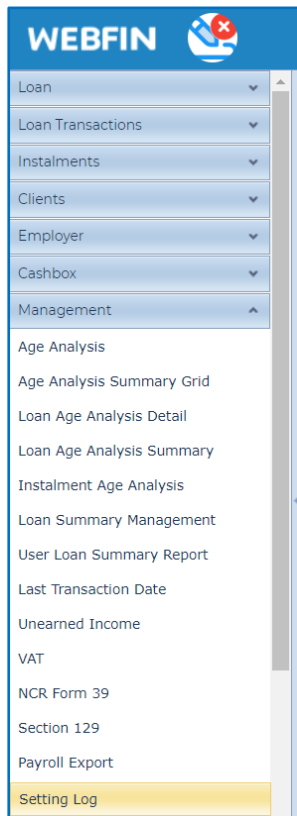


The report includes an **Employer** and **Date** filter. After the filters have been applied, the results will be displayed in a **Grid** with the standard grid grouping and export functions.



Setting log report

Added the Setting Log changes report to > Management > [Setting Log](#):



This report was developed to record and list specific setup setting changes that occurs in the branch and global setup.

The report includes an **Employer** and **Date** filter. After the filters have been applied, the results will be displayed in a **Grid** with the standard grid grouping and export functions.

The system will log the following setting changes:

- **Branch - Integration Settings**

- ∞ Fingerprints
- ∞ Signature
- ∞ Insurance
- ∞ SOS
- ∞ DCS
- ∞ Payment Systems
- ∞ Payout Systems
- ∞ CPRAS
- ∞ SMS
- ∞ POS Setup



- **Global - Loan Types**

- ∞ Identification
- ∞ Interest rates
- ∞ Loan Capping options
- ∞ Capital granted
- ∞ Instalment period
- ∞ Initiation Fee
- ∞ Service Fee
- ∞ Insurance
- ∞ First Payout
- ∞ Second Payout
- ∞ General

- **Global - Users (not types)**

- ∞ Name
- ∞ ID Number
- ∞ Email
- ∞ Username
- ∞ Password
- ∞ Default Branch
- ∞ User Type
- ∞ Allps Username
- ∞ Allps Branch

All Global setting changes will be recorded on the “**Global**” branch that can be selected in branch filter:

Report Parameters

Report Filter

Branch: Global

From Date: Delter H/O

Created By User: Best Branch

Altron Worldwide

Global

All

All

End of Webfin V3.1.1 Changelog

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