

WEBFIN CHANGELOG

VERSION 2.28.26

Release date:01/09/2020

DELTER

A DIVISION OF ALTRON



CHANGES FROM VERSION 2.27.24

Updates:

☞ **Dependent Info Validations**

- » The following dependent information fields have been made mandatory when submitting a claim to UIA:
 - Id Number
 - Surname
 - Cell
 - Bank
 - Bank Account number

☞ **Date of Birth to UIA Batch file**

- » The Date of Birth field is now included in the UIA insurance batch file.

☞ **Custom Receipt Types**

- » Made enhancements to allow the creation of a custom receipt type in the setup and that it can function as a repayment method.

☞ **Renaming of Cheque to Current**

- » Renamed the Bank Account Type “Cheque” to “Current” on the Client’s, Dependent’s, and Agent’s banking details.

☞ **Prevention of sending multiple bulk SMS**

- » The “Send” button on the “Send bulk SMS message” screen will not be able to be clicked after the first click, to prevent sending multiple SMS to clients.

☞ **Client Loan Statement additions**

- » The following enhancements have been made to the Client Loan Statement report in Webfin:
 - Removed the: Expected late interest and late costs, Client Home & Work tel.
 - Added the Age Analysis total for client at the end of the Statement (per client) as on the date of statement is drawn.
 - Added the Branch's NCR number at the top of the Statement.
 - Added Branch Physical address beneath Name.
 - Added the Annual Interest Rate Percentage per loan.
 - Added the client status on the top of the report.
 - Added the current/today's date on the report.

- Added the total outstanding balance on the report.
- Changed layout from landscape to portrait.
- Made the client's details fit into a standard envelope window when folded.
- Added in Branch's banking details.
- Added in client's reference.

☞ Province and Country field on the Client edit form

- » The Country dropdown menus have been added for physical and postal addresses on the client's Edit & Create screen.
- » If the Country selected on the dropdown menu is South Africa or Zambia, the Province field will be a dropdown menu with the provinces corresponding to the Country, and the merchant will be able to select a province from the prepopulated list.
- » If the country selected is any other country, the Province field will be a text field and the merchant can manually capture the province.
- » See figure below:

The screenshot displays the 'Client edit form' with two main address sections: 'Physical Address' and 'Postal Address'.
 - **Physical Address:** Country is 'ALGERIA', Province is 'Capture Province'.
 - **Postal Address:** Country is 'SOUTH AFRICA', Province is a dropdown menu showing a list of South African provinces: EASTERN CAPE, FREE STATE, GAUTENG, KWAZULU-NATAL, LIMPOPO, MPUMALANGA, and NORTH WEST.
 Blue arrows indicate the Country dropdowns in both sections. A green arrow points to the Province field in the Physical Address section.

☞ Ability to Opt-Out for Insurance in Webfin

- » An enhancement has been added to allow the user the ability to Opt-Out for insurance when creating a new loan from the front-end.
- » This functionality can be set @: Webfin>Setup>Loan>Insurance
- » See figure below:



Add	Edit	Remove	Insurance types								
Description	Insurer	Insure	Calc type	Max age	Min amount	Max amount	Step amount	Type	Cost	Incl in Form39	Can Opt Out
Liberty 1%	Liberty	Cap+Int+Ini+Ser	Outstanding per p...	99	1.00	30,000.00	0.00	Percent	0.4500	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Liberty 2%	Liberty	Cap+Int+Ini+Ser	Outstanding per p...	99	1.00	30,000.00	0.00	Percent	0.4500	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Liberty 3%	Liberty	Cap+Int+Ini+Ser	Outstanding per p...	99	1.00	30,000.00	0.00	Percent	0.4500	<input type="checkbox"/>	<input checked="" type="checkbox"/>



New Features in V2.28.26:

Allps FEZA card Integration

- » A new functionality has been added that will allow users the ability to create and maintain a FEZA wallet in Webfin.
- » Users can now perform the following functions on FEZA Integration:
 - Create a Wallet.
 - Check Wallet status.
 - Link card to a Wallet.
 - Unlink Card.
- » The FEZA integration can be accessed on **Webfin>Client Profile>Payout Options>FEZA**

Loan	Client	Bank	Employment	Documents	References	Payout options
FEZA						
Check wallet Status	Create wallet	Link card to wallet	Unlink card			

- » Check wallet Status – checks the status of a wallet and returns results accordingly.
- » Create Wallet – Creates a new client wallet with Allps.
- » Link card to Wallet – Links a card to an existing wallet.
- » Unlink Card – Removes a card from an existing wallet.

I. Create Wallet



- » On the client screen under Payout Options when selecting FEZA in the dropdown list there will be a Create Wallet button that can be clicked if no wallet exists, so that a wallet can be created.
- » The user will have three options to choose from, in all three options the cellphone number that has been setup for the user on Webfin will be displayed under cell number input box.
- » Below is a list of options which can be used when creating a Wallet:
 - eWallet with EMV FEZA Card that requires the user to input a card number.
 - eWallet with Magstripe FEZA Card which requires the user to input a card number and a mailer number.
 - eWallet with cellphone number.
- » Figure below shows the “Create eWallet” options to choose from

Cancel Create Create eWallet

eWallet with EMV FEZA Card

eWallet with Magstripe FEZA Card

eWallet with Cellphone number

Card number:

Cell number:

Once the eWallet is created, a message box will pop alerting the user of successful creation. A wallet can also be created if the client does not have a wallet, during the loan creation process and if the payout method selected is FEZA

Merchants can now also create a wallet for a consumer during the loan creation process on the Loan Details screen

II. Link Card to wallet

- » A client that has an existing eWallet can link a card to the eWallet by clicking on the “Link card to Wallet” button.
- » The user will have two options they can choose from when linking a card to an existing wallet.
- » The two options are “Link EMV FEZA Card” and “Link Magstripe FEZA Card”.
- » See the “Link Card to Wallet” screen below:



Cancel Create Link Card to Wallet

Link EMV FEZA Card

Link Magstripe FEZA Card

Card number:

III. Unlink Card

- » The Unlink card functionality will Unlink an allocated card from the client's existing wallet.
- » When a user clicks on the "Unlink Card" button, a confirmation message box will pop up for the user to confirm the cancellation of the card from the Wallet

Allps Payout

- » A new functionality has been added on Webfin for Allps payout. This will allow merchants the ability to payout loan capital to FEZA Wallets.
- » When a user pays out a loan to a client that has a FEZA Wallet, a payout screen will pop displaying the amount to be paid out to the FEZA Wallet.
- » The Payout amount cannot be less than R10.00, a warning message box will pop up should the user attempt to payout an amount less than R10.00.
- » See the figure below:

Cancel Continue Loan payout

Action: Payout now

Payout amount: 20.00

Payout method: FEZA

- » The "Continue" button will pop up a confirmation message box to confirm the payout amount.

Bank Account Number Validation



- » A new functionality has been added that will validate the client's bank account number field.
- » The bank account number validation must be turned on/active for validation to occur.
- » The functionality must be activated on the following location **Webfin>Setup>Branch Setup>Validations.**
- » See the figure below:

Validation		
Validate name	<input type="checkbox"/>	
Validate surname	<input checked="" type="checkbox"/>	ON
Validate physical address	<input checked="" type="checkbox"/>	ON
Validate physical address code	<input checked="" type="checkbox"/>	ON
Validate postal address	<input checked="" type="checkbox"/>	ON
Validate postal address code	<input checked="" type="checkbox"/>	ON
Validate bank account	<input checked="" type="checkbox"/>	ON
Validate bank account min value	<input type="text"/>	5
Validate bank account max value	<input type="text"/>	15
Strip invalid characters	<input checked="" type="checkbox"/>	ON

- » The merchant can set the minimum and maximum value on which the bank account number must validate on.
- » Will only allow numeric characters on the Client's bank account number field if turned on.
- » Should the merchant capture an account number that does not meet the required minimum value, a notification will pop up as shown in the figure below. The same applies when exceeding a maximum value.

Cancel	Save	Edit Client		
Personal Details	Banking Details	Employer Details	Insurance Details	NCR stats
Bank Details				
Bank name:	<input type="text" value="CAPITEC"/>		Branch name:	<input type="text" value="Universal Bank Code"/>
Branch code:	<input type="text" value="470010"/>			
Account Details				
Account number:	<input type="text" value="456"/>	Too short!	Account type:	<input type="text" value="SAVING"/>
Account holder:	<input type="text" value="T MOLOANTO"/>			

End of Webfin V2.28.26 changelog



DELTER

A DIVISION OF ALTRON

Contact Details

Tel: +27 12 060 0370

Email: info@delter.co.za

Physical Address:

Glenfield Office Park,
375 Oberon Ave, Block F,
Faerie Glen, Pretoria, 0081

Postal Address:

P.O. Box 70361,
Die Wilgers, 0042

www.delter.co.za