



# DELFIN CHANGELOG

## LATEST VERSION 8.87



**DELTER**

A DIVISION OF ALTRON

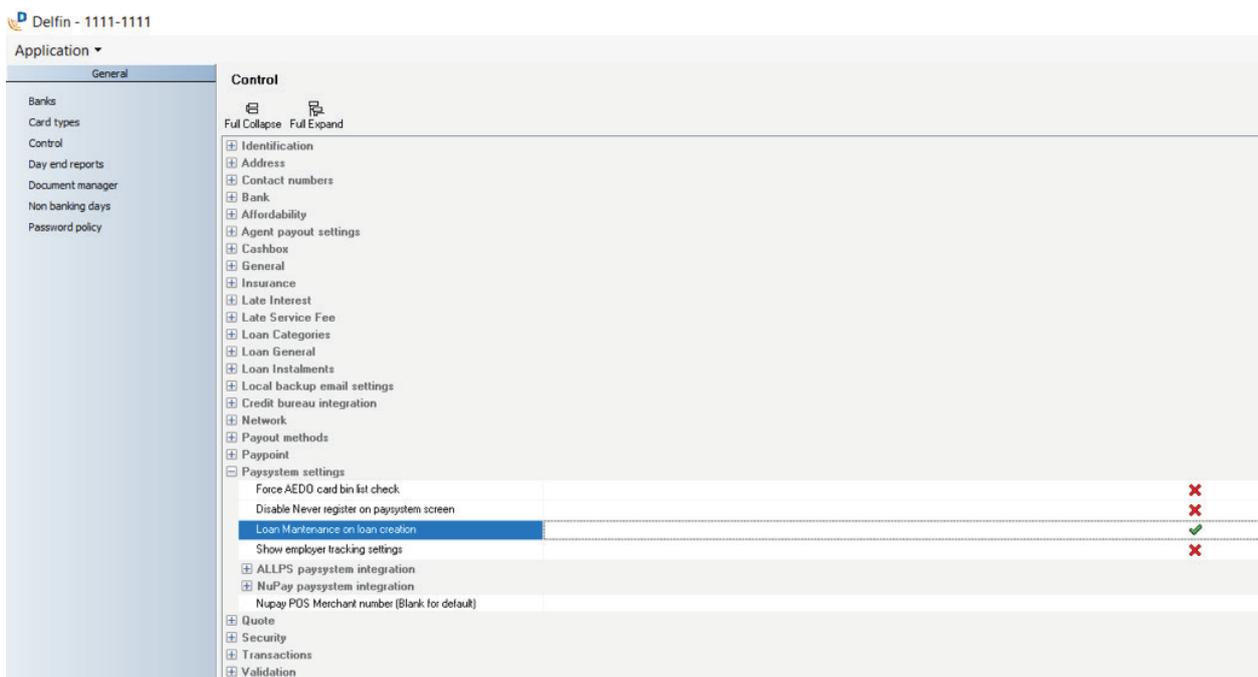
## CHANGES FROM VERSION 8.86

### Updates:

- » An “Affordability Spelling” correction has been made on the client screen.

### New Features:

- » A selectable option has been added to do maintenance during loan creation for loans registered through NuPay. If this option is set to “inactive” Delfin will not do loan maintenance on loans registered with NuPay. What this means is that if a client’s payment frequency is set to “Monthly” and the client’s pay date is the 28<sup>th</sup>, all installments for that loan will consecutively follow on the 28th. If the maintenance option is set to ‘Active’, Delfin will automatically conduct loan maintenance on all installments of the loan to ensure the end of the month is selected and to ensure optimal collections success with the pay system



When this setting is:

*Active* - Loan Maintenance will be executed by Delfin as per normal right after the loan is submitted.

*Inactive* - **No** Loan Maintenance will be executed by Delfin.

Please Note: This setting will default to “Inactive” for all Finbond branches\*\*

- » An abbreviated name can now be added on all your pay systems in Delfin and will print with contracts.  
Please contact our support department to assist in adding the abbreviated name to your “Active Pay Systems” and contracts.
- » An age limit setting has been added in Delfin. A global age limit can be set here. If an age has been set Delfin will block users from granting loans to any clients older than the specified age.  
The setting can be found under *Application > Control > General > Age limit*.



Application ▾

General

Banks  
Card types  
Control  
Day end reports  
Document manager  
Non banking days  
Password policy

Control

Full Collapse Full Expand

Identification  
Address  
Contact numbers  
Bank  
Affordability  
Agent payout settings  
Cashbox  
General

Popap client's default note		✗
DOB century cutoff age	16	
Print lines and boxes on reports		✓
Use grid to display clients (colorful can be very slow)		✓
An item must be locked before a loan can be granted		✗
Client has extra bank		✗
Can add clients with the same banking details		✗
Age limit	16	
VAT rate	15.0000	
Bank repo rate	0.0000	

Force this after day end:

Insurance  
Late Interest  
Late Service Fee  
Loan Categories  
Loan General  
Loan Instalments  
Local backup email settings  
Credit bureau integration  
Network  
Payout methods  
Paypoint

- » A secondary line of authorization has been added for client fingerprint registrations through new permissions in Delfin. Any user who has the authority can now be included in any fingerprint registration or re-registration process to prevent fraudulent occurrences. There are two places to activate this function:

A global option has to be activated first under *Application > Setup > General > Control > Expand the Security tab > Verifinger > Management Authorization*.

Delfin - 1111-1111

Application ▾

General

Banks  
Card types  
Control  
Day end reports  
Document manager  
Non banking days  
Password policy

CashBox  
Clients

Control

Full Collapse Full Expand

Identification  
Address  
Contact numbers  
Bank  
Affordability  
Agent payout settings  
Cashbox  
General  
Insurance  
Late Interest  
Late Service Fee  
Loan Categories  
Loan General  
Loan Instalments  
Local backup email settings  
Credit bureau integration  
Network  
Payout methods  
Paypoint  
Paysystem settings  
Quote  
Security

User idle timeout(minutes)	0	
Check if the system date has been changed		✓
Client		
Log		
Notifications		
Verifinger		
Active		✓
Active for clients		✓
Verify client before refund		✓
Can skip client verification		✓
Override verification per client		✓
Define client fingers to scan	0000000001	
Use client nominee		✗
Define user fingers to scan	0000000001	
Define user fingers to use for verification	0000000001	
Verify user before granting loan		✓
Verify users in cashbox and paypoint transactions		✗
Management authorization		✓



Then a second option can be activated per user under User permissions within the setup for the specific users you would want to be a part of the fingerprint registration process, like a Manager for instance. This can be found under *Application > Setup > Users > Users > Select the desired user > On General Tab > Scroll down to Verifinger, and activate 'Management Authorization'*.

Delfin - 1111-1111

Application ▾

- General
- CashBox
- Clients
- Employers
- Integration
- Loans
- System
- Users

Users

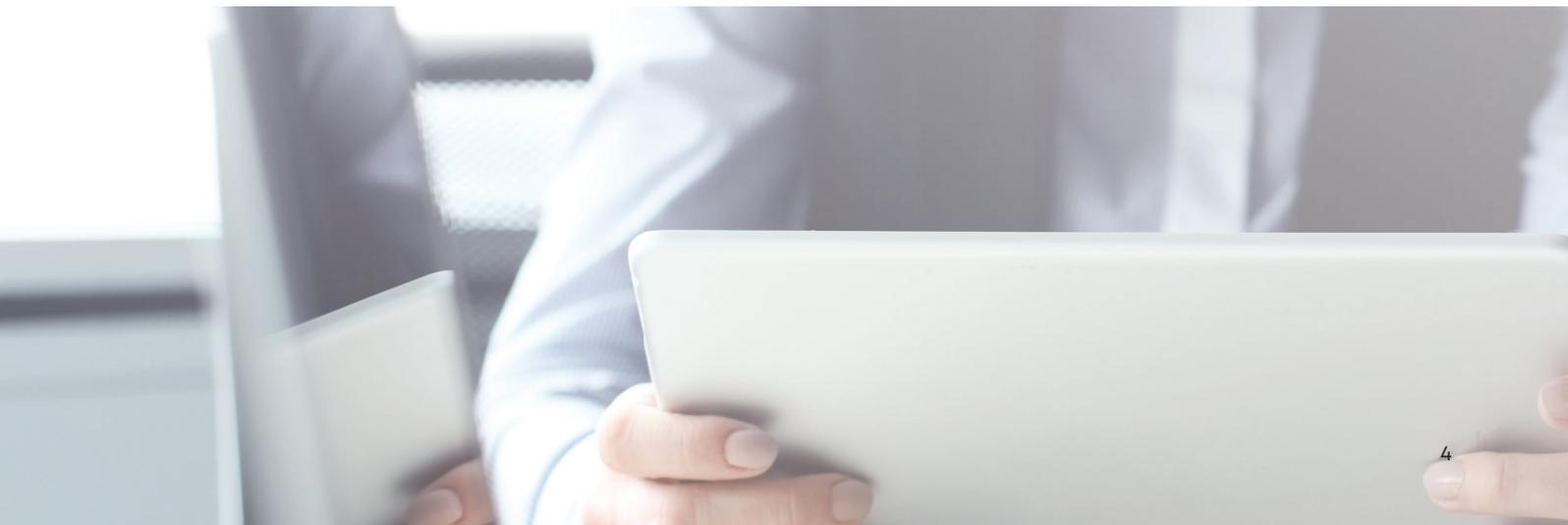
User Name  
ADMIN  
TEST

Reset options ▾

General	Loans
<input type="checkbox"/> Notifications	<input checked="" type="checkbox"/>
Receive system startup notifications	<input checked="" type="checkbox"/>
Receive client status notifications	<input checked="" type="checkbox"/>
<input type="checkbox"/> Payment Systems	
<input type="checkbox"/> ALLPS 1 Settings	
User name (Only applicable for Allpr-1)	
User password (Only applicable for Allpr-1)	
Can process	<input checked="" type="checkbox"/>
Can change Payscale paydates	<input checked="" type="checkbox"/>
Can cancel Payscale transactions	<input checked="" type="checkbox"/>
Can choose the psyscale registration action	<input checked="" type="checkbox"/>
Can change the psyscale tracking	<input checked="" type="checkbox"/>
<input type="checkbox"/> Payout Systems	
Can process PACS	<input checked="" type="checkbox"/>
Can process Nedinform	<input checked="" type="checkbox"/>
<input type="checkbox"/> Quotes	
Can give quotes	<input checked="" type="checkbox"/>
Can accept quotes	<input checked="" type="checkbox"/>
Can override expiration days	<input checked="" type="checkbox"/>
Can decline quotes	<input checked="" type="checkbox"/>
Can do quotes on any loan type	<input checked="" type="checkbox"/>
<input type="checkbox"/> Reports	
Administrative	<input checked="" type="checkbox"/>
Manager	<input checked="" type="checkbox"/>
<input type="checkbox"/> Security	
Can override date discrepancy	<input checked="" type="checkbox"/>
Can change security code	<input checked="" type="checkbox"/>
Can override security code	<input checked="" type="checkbox"/>
Can change photographs	<input checked="" type="checkbox"/>
Can skip sms verification on new loan	<input checked="" type="checkbox"/>
<input type="checkbox"/> Verifinger	
Can register fingerprints	<input checked="" type="checkbox"/>
Can re-register fingerprints	<input checked="" type="checkbox"/>
Use when logging into Delfin	<input checked="" type="checkbox"/>
Use when logging into Setup	<input checked="" type="checkbox"/>
Can ignore verification	<input checked="" type="checkbox"/>
Can skip client verification	<input checked="" type="checkbox"/>
Use when overriding permission in Delfin	<input checked="" type="checkbox"/>
Can Skip Client initial registration	<input checked="" type="checkbox"/>
Can select override per client	<input checked="" type="checkbox"/>
Management authorization	<input checked="" type="checkbox"/>

» A “Fingerprint de-activate per client” option has been added in Delfin. Any user who has the permissions can now activate this feature, per client, which will skip all fingerprint verification required for that client.

A global option has to be activated first under *Application > Setup > General > Control > Expand the Security tab > Verifinger > Override verification per client*.





Delfin - 1111-1111

Application ▾

General

Banks  
Card types  
Control  
Day end reports  
Document manager  
Non banking days  
Password policy

CashBox  
Clients

Control

Full Collapse Full Expand

Identification

Address  
Contact numbers  
Bank  
Affordability  
Agent payout settings  
Cashbox  
General  
Insurance  
Late Interest  
Late Service Fee  
Loan Categories  
Loan General  
Loan Instalments  
Local backup email settings  
Credit bureau integration  
Network  
Payout methods  
Paypoint  
Payssystem settings  
Quote  
Security

User idle timeout(minutes) 0

Check if the system date has been changed ✓

Client

Log

Notifications

Verifinger

Active ✓

Active for clients ✓

Verify client before refund ✓

Can skip client verification ✗

Override verification per client ✓

Define client fingers to scan 0000000001

Use client nominee ✗

Define user fingers to scan 0000000001

Define user fingers to use for verification 0000000001

Verify user before granting loan ✓

Verify users in cashbox and paypoint transactions ✗

Management authorization ✓

» A second permission can then be activated per user in the user setup. [Setup > Users > Users > 'Select a user' > 'Can select Override per client'](#).

Delfin - 1111-1111

Application ▾

General  
CashBox  
Clients  
Employers  
Integration  
Loans  
System  
Users

Users

Users

User Name  
ADMIN  
TEST

Reset options ▾

General Loans

Can override expiration days ✓

Can decline quotes ✓

Can do quotes on any loan type ✓

Reports

Administrative ✓

Manager ✓

Security

Can override date discrepancy ✓

Can change security code ✗

Can override security code ✗

Can change photographs ✗

Can skip sms verification on new loan ✓

Verifinger

Can register fingerprints ✓

Can re-register fingerprints ✓

Use when logging into Delfin ✓

Use when logging into Setup ✓

Can ignore verification ✗

Can skip client verification ✓

Use when overriding permission in Delfin ✓

Can Skip Client initial registration ✗

Can select override per client ✓

Management authorization ✓



- » After all permissions have been granted a new option can then be switched on OR off per client. This option can be found on the client in Delfin under the “Security” tab.

Delfin - 1111-1111

Application ▾ Client ▾ Transactions ▾ Tasks ▾ Cashbox ▾ Paypoint ▾ Reports ▾ Affordability Check ▾ System ▾

40.00 New Loan Phone Loan Payment Note Diary

Client No: 5 ID No.: 9005034102087 Birth Date: 03/05/1990

Title: MR Surname: TESTER

Name: TEST Initials: T Age: 28

Nick Name: TEST Number of dependants: 0

Gender: MALE Marital Status: SINGLE

Category: Language: ENGLISH

Nationality: SOUTH AFRICA Country of birth: SOUTH AFRICA

Status: Active 17/04/2019 8 GIDION

Status Info: First loan granted

Information Affordability **Security** Notes

Finger security  
Override fingerprint for client ✓

Info Loans (4) Client Bank Employment NCR Stats Checklist Documents Payout methods Insurance

Contact Physical Address

Credit Check Line 1: LINE 1

Reference

- » If the “Security” tab does not display on your client make sure all the options mentioned above are activated, then go to *System > Set Client information Options > And tick 'Security'*.

Delfin - Client information options

Previous Next

Visible	Page
<input checked="" type="checkbox"/>	Information
<input checked="" type="checkbox"/>	Affordability
<input checked="" type="checkbox"/>	Security

Accept Discard Help

Make sure Delfin is in Edit mode when activating the “Override Fingerprint for client” option.

Please note: If this fingerprint option is activated Delfin needs to be closed and re-opened for the functions to take effect.

- » A “Pay System Cancel” option has been added in Delfin for NuPay registered loans. When a payment is made on a **registered loan**, Delfin will give the user the option to cancel the loan on NuPay. If you Click on “Yes” the loan will be closed on NuPay’s side. If you Click “No” the loan will stay active on NuPay’s side.

Confirm

? Loan 5001 is registered with a repayment system. Would you like to deregister/cancel the loan on the repayment system?

Yes No



- » This feature can be activated within the Delfin Setup.
- There are two options to activate for the feature to be active. The first can be found under *Setup > Integration > Payment System > 'Select a Pay System' > "Cancel loans"* – Tick box:

Delfin - 1111-1111

Application ▾

- General
- CashBox
- Clients
- Employers
- Integration
- DCS (Debt collecting)
- Delfer IT connections
- General ledger
- NuCard
- Nupay Cloud Terminal
- Payment systems
- Signature pad setup
- SMS portal
- VOIP portal
- CPRAS Setup

### Payment systems

Access Control

Username: test Merchant Number: test  
 Password: \*\*\*\* Abbreviated name:

Identification  
 Active Code: Nn Description: Nupay NAEDOS

Instalments  
 Maximum: 15,000.00 Action: Error

System Options  
 PDS Type: Nupay NAEDOS Delay in ms: 500  
 **Cancel loans**  Use serial device

Loan Registration Options **Installation split options**

Default Registration Action  
 Always  Later  Never

Allow the user to choose the registration action and tracking

Cost  
 Adc Type: None Value: 0.0000 Rounding: None  
 Charge on every loan Minimum: 0.00 Maximum: 0.00  
 Percentage of fee that client is responsible for: 0.0000

Connection Options

Options  
 Wait for answer Server Path: https://www.nupaytsp.co.za/wsNaedo/wsNaedo.asmx

Devices

Active	Description
<input checked="" type="checkbox"/>	Allps AEDOS
<input type="checkbox"/>	Allps EFT
<input type="checkbox"/>	Allps EFT(Swipe)
<input checked="" type="checkbox"/>	Allps NAEDOS
<input type="checkbox"/>	Allps SEFT
<input type="checkbox"/>	Allps SEFT(Swipe)
<input type="checkbox"/>	BPS
<input checked="" type="checkbox"/>	NUPAY MPS
<input checked="" type="checkbox"/>	NUPAY: DC single
<input checked="" type="checkbox"/>	NUPAY: DC terminal
<input type="checkbox"/>	NUPAY: TT2
<input checked="" type="checkbox"/>	Nupay AEDOS
<input checked="" type="checkbox"/>	Nupay NAEDOS
<input type="checkbox"/>	Paym8
<input type="checkbox"/>	Realpay NAEDOS

The second is a user permission found under *Setup > Users > Users > 'Select user' > "Can Cancel Pay system transactions"*

Delfin - 1111-1111

Application ▾

- General
- CashBox
- Clients
- Employers
- Integration
- Loans
- System
- Users

### Users

User Name  
 ADMIN  
 TEST

Reset options ▾

**General** **Loans**

Employers

Notifications  
 Receive system startup notifications   
 Receive client status notifications

Payment Systems  
 ALLPS-1 Settings  
 User name (Only applicable for Allps-i)  
 User password (Only applicable for Allps-i)

Can process   
 Can change Payscale paydates   
 **Can cancel Payscale transactions**   
 Can choose the payscale registration action   
 Can change the payscale tracking

Payout Systems  
 Can process PACS   
 Can process Nediform

Quotes





- » NuPay launched the use of a new MagIC R-4 TCC Terminal. An option to print a slip through Delfin when a registered loan has been made, has been added. This option can be found under *System > Local PC Setup > Nupay > Slip print*.

Delfin - Local Computer Setup

Printers | Allps | **Nupay**

Terminal Type: Cloud terminal

Serial Port Setup

TCC ID: 123456789

TCC URL: http://196.14.89.40/WS\_TermRC/WS\_TermRC.aspx

Slip print:

TCC Default Test TCC

Accept Discard Help

## Improvements:

- » Updated and added the following South African Banks:
  - African Bank
  - Bidvest Bank Limited
  - Bank Zero Mutual Bank
  - BNP Paribas
  - Discovery Bank
  - FBC Fidelity Bank Limited
  - J.P. Morgan Chase Bank n.a.
  - Olympus Mobile Bank
  - South African Post Office LTD.
  - Standard chartered bank
  - Tymebank LTD.
- » Implemented a bank name change. Changed “Bank of Athens” to Grobank LTD.
- » Renamed the Loan Status Button from “Status” to “Action”



