



DELFIN CHANGELOG

LATEST VERSION 8.87



DELTER

A DIVISION OF ALTRON

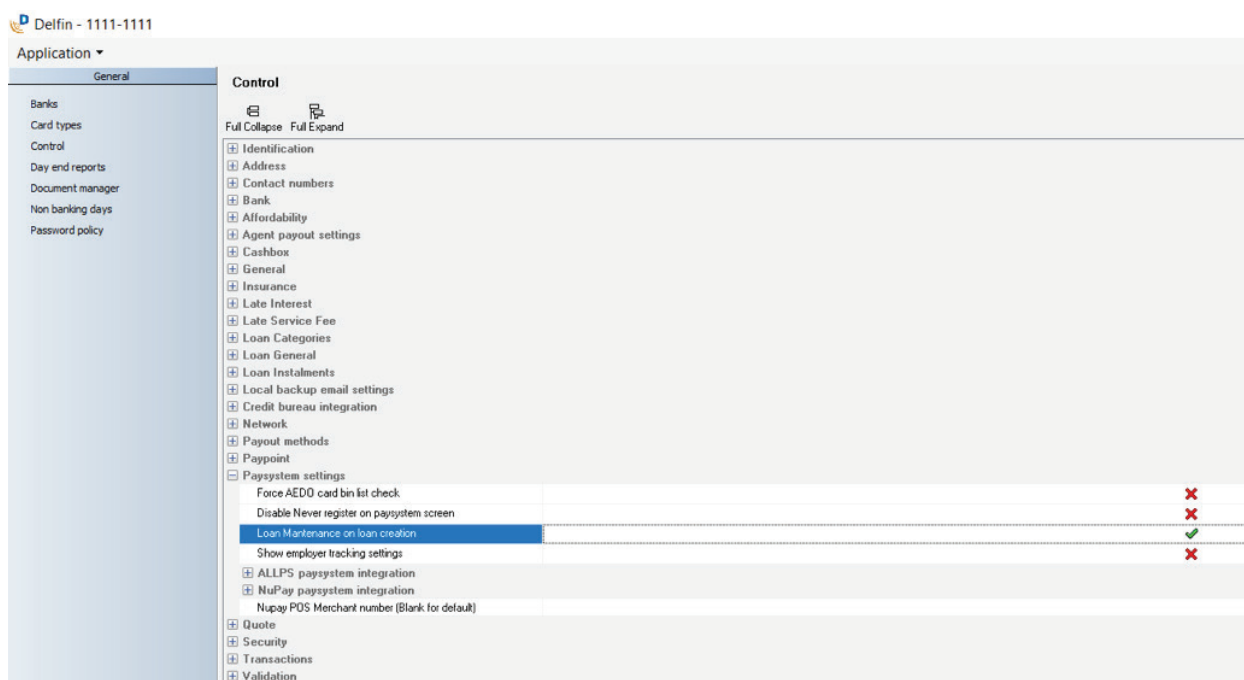
CHANGES FROM VERSION 8.86

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 28th, 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

Popul client's default rate

DOB century cutoff age

Print lines and boxes on reports

Use grid to display clients (could be very slow)

Account must be locked before a loan can be granted

Client has extra bank

Can add clients with the same banking details

Agent fee

VAI rate

Bank repo rate

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

Paypoint settings

Quote

Security

User idle timeout(minutes)

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

Use client nominee

Define user fingers to scan

Define user fingers to use for verification

Verify user before granting loan

Verify users in cashbox and paypoint transactions

Management authorization

- » 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 ▾

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General

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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

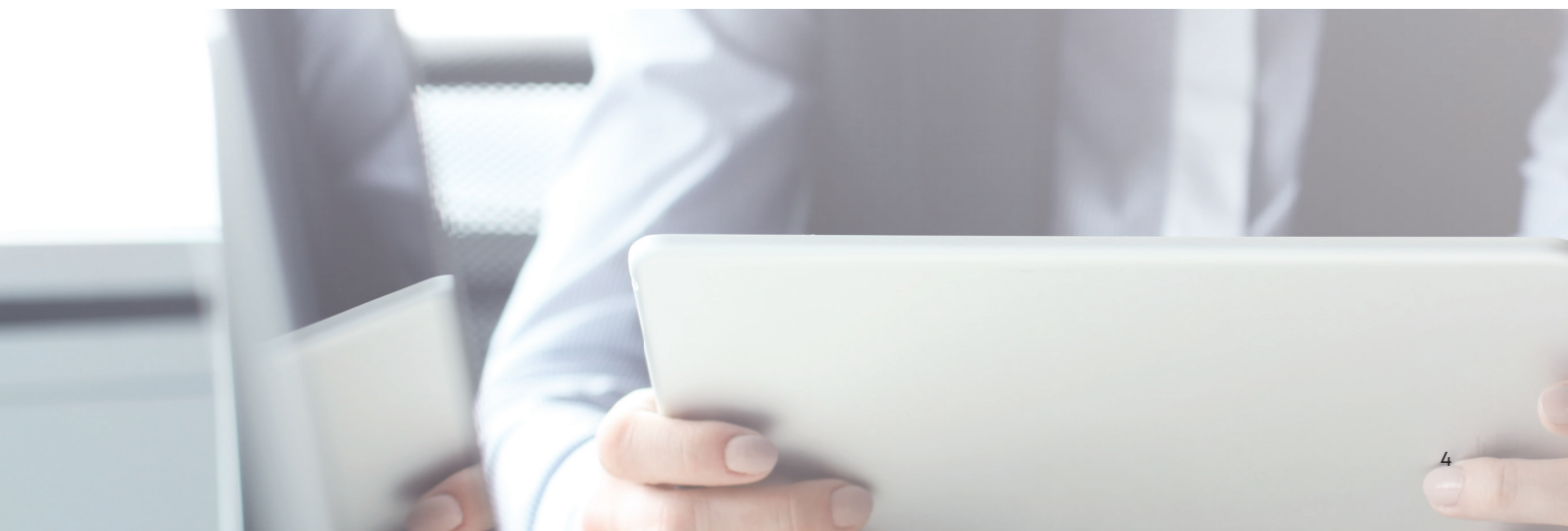
User Name
ADMIN
TEST

Reset options ▾

General	Loans
Employers	✓
Notifications	
Receive system startup notifications	✓
Receive client status notifications	✓
Payment Systems	
ALLPS 1 Settings	
Use name (Only applicable for Allps-1)	
Use password (Only applicable for Allps-1)	
Can process	✓
Can change Payssystem paydates	✓
Can cancel Payssystem transactions	✓
Can choose the payssystem registration action	✗
Can change the payssystem tracking	✗
Payout Systems	
Can process PACS	✓
Can process Nedinform	✓
Quotes	
Can give quotes	✓
Can accept quotes	✓
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	✓

- » 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 ▾

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Non banking days

Password policy

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Loan Categories

Loan General

Loan Instalments

Local backup email settings

Credit bureau integration

Network

Payout methods

Paypoint

Paypoint 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.

The screenshot shows the Delfin software interface for client '1111-1111'. The 'Security' tab is selected, showing a yellow box with the text 'Finger security' and 'Override fingerprint for client' with a green checkmark. The client details include: 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. The bottom bar shows various tabs like Info, Loans (4), Client, Bank, Employment, NCR Stats, Checklist, Dokuments, Payout methods, and Insurance.

- » 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'*.

The screenshot shows the 'Delfin - Client information options' dialog box. It has 'Previous' and 'Next' buttons at the top. Below is a table with 'Visible' and 'Page' columns. The 'Security' row is highlighted with a blue background and has a checked checkbox in the 'Visible' column. At the bottom are 'Accept', 'Discard', and 'Help' buttons.

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

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.

The screenshot shows a 'Confirm' dialog box with a question mark icon. The text reads: 'Loan 5001 is registered with a repayment system. Would you like to deregister/cancel the loan on the repayment system?'. There are 'Yes' and 'No' buttons at the bottom.



- » 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

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.nupaytp.co.za/wsNaedo/wsNaedo.aspx

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
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- Integration
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- System
- Users

Users

User Name

ADMIN

TEST

Users

Reset options ▾

General Loans

Employers

☒

Notifications

Receive system startup notifications

Receive client status notifications

☒

Payment Systems

ALLPS-I 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 paysystem registration action

☒

Can change the paysystem tracking

☒

Payout Systems

Can process PACS

☒

Can process Nedirform

☒

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”





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