



WEBFIN 2 CHANGELOG

LATEST VERSION: 2.25.22



WebFin

DELTER

A DIVISION OF ALTRON



CHANGES FROM VERSION 2.24.21 TO 2.25.22

Improvements:

- » Webloans now has the capability to validate identification numbers of countries outside South Africa.
- » Cellphone numbers will now be validated based on Webloans nationality chosen in Webloans settings on Webfin.
- » Two fields have been added to give the users the capability to enter their date of birth and their nationality

New Features:

- » Added user permissions to Add, View or Delete client documents, permissions will be on by default
- » Added a new report [Loan transactions > Transactions Insurance Product Split](#) that displays the insurance per transaction split up between different products. The columns of the report are the same as the [Loan transactions > Transactions](#) (Grid) report with the addition of one extra column per insurance product active in the period selected for the report:

Insurance		
	UC 0.45%	UP 1%
0	0.30	0.00
9	0.59	0.00
0	16.25	0.00
9	0.59	0.00

Figure 1: Insurance

- » Webfin will now receive notifications of records that are due for code change (to code B or Y) as received from SOS
- » User permission for these notifications has been added so that only user types with permission will be able to receive and view these notifications

[Setup > User > User Types > *Select User Type* > Edit > Notifications > SOS Prescribed Count](#)



Branch		Add		Edit	Remove	Loantype Settings		User Type Setup
Branch setup		Type ID		Description				
General								
Client		1		CLERK				
Integration		2		SUPERVISOR				
Loan		3		OWNER				
User		4		ACCOUNTANT				
Users		5		RUNNER				
User types								

Back

Save

Edit OWNER

Type Description: OWNER

☒ Payment

☒ Cashup

☒ Reports

☒ Refund

☒ Integrations

☒ Capture mode

☒ Employer

☒ Fingerprint

☒ Section 129

☒ Insurance

☒ Overrides

☒ Notifications

☒ Sos Prescribed Count

Note: This User Permission will be disabled by default upon updating to this version.

Prescribing loans will only show in notifications if the branch has any loans that will prescribe. These notifications only display per branch (For the branch the user is currently logged into)

Loan Notifications 7

Pending Loans 1

Approved Loans 1

My Loans Approved

Declined Loans 3

Webloans Pending 1

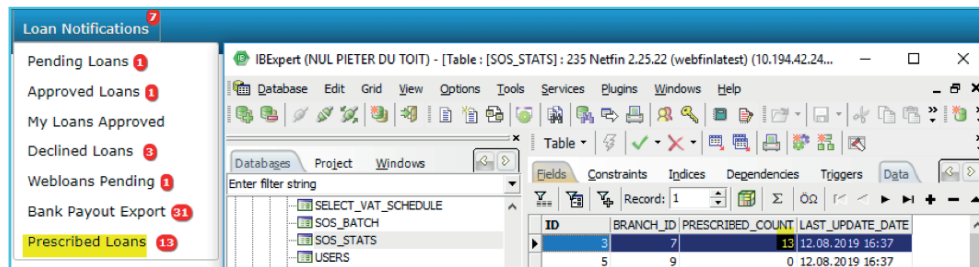
Bank Payout Export 31

Prescribed Loans 13

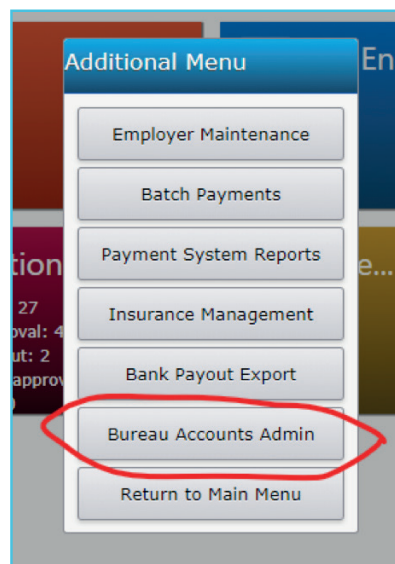
Clients

Setup

The Prescribing loans count for each branch will be stored on the DB

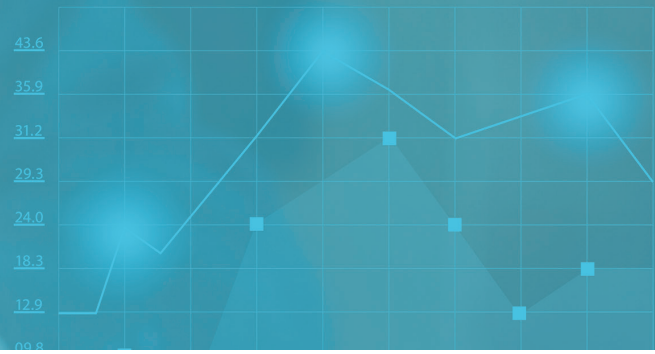


- Added new menu item under “More...” menu (Additional Menu)



- Added a new screen that loads the Current Branch's Prescribing Loans list

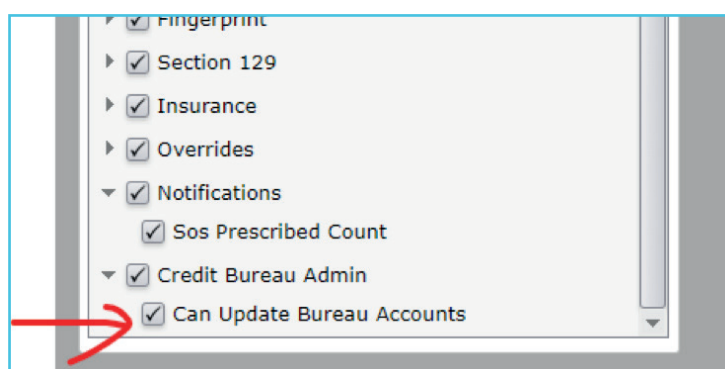
Client Details				Loan Details					
ID number	Name	Surname	File nr	Loan nr	Period	BureauAccto	Balance	Arrears	MonthsInAr
9212085783084	MMANOKO	RABALAO	2376	8942345	1	2376	936.00	936.00	22
7807285317088	PATRICK	MATHONSI	69	8928531	4	69	514.00	257.00	1
8904120433086	AGNES	MATOLOLOLO	2060	8941699	1	2060	679.00	679.00	3
7804030836082	NOMVULA	SKUNYANA	1754	8941850	1	1754	928.00	928.00	23
9207206369086	HLAYISANI	CHAUKE	2130	8942010	1	2130	804.00	0.00	0
8804216070083	THULANI	NTOMBELA	2291	8942166	1	2291	1,571.00	1,571.00	3
7903156200089	LESHIBA	MACHABA	347	8939834	4	347	1,444.00	1,444.00	2
9305265754089	MAKOLA	MOHALE	2372	8942042	1	2372	1,336.00	1,336.00	3
9406245545082	THABANG	MOKWAPE	2173	8941852	1	2173	1,318.00	1,318.00	3
8009305990080	AYANDA	LABHABHA	1626	8941915	1	1626	665.00	665.00	3
8012235809081	NTEBALENG	MADIKANE	2407	8942243	1	2407	1,922.00	0.00	0
9204165198085	TEBOGO	MAKGAE	2415	8941741	1	2415	1,926.00	1,926.00	3
8810020921080	DUDUZILE	MAZIBUKO	2430	8941761	1	2430	1,965.00	1,965.00	3
9112225795081	DELMA	CHAUKE	2455	8941985	1	2455	1,410.00	1,410.00	3
8906136322088	VHELAPHI	SHIHOZA	2331	8942021	1	2331	678.00	678.00	3
8309245698086	RISIMATI	MTILENI	2249	8942203	1	2249	1,926.00	1,926.00	3
7808095294087	NKOSINATHATHI	SHEZI	2493	8942295	1	2493	1,595.00	1,595.00	3
6406066354088	THEMBA	SHABALALA	2485	8942270	1	2485	1,696.00	1,696.00	3



- Here the prescribe codes for loans that will prescribe soon can be chosen before the loans prescribe. Available choices are “Prescribe” and “Legally Interrupted”
- When choosing Y, you also need to specify an Interruption Date. This date will default to today's date.
- When changing any value, the Update check box will be selected.
- You can also manually select or deselect the records you would like to update.
- If there are records to update, you can click the Update button at the top to submit the new codes.
- After completion, it will notify you that the data has been sent to the server.
- You can still change any prescribing loan's code up until the loan reaches the prescription date. This is indicated by the 'Days Left' column.

Active	<input type="checkbox"/>			4
Active	<input type="checkbox"/>	Legally Interrupted	21/08/2019	5
Active	<input type="checkbox"/>			35
Active	<input type="checkbox"/>			1
Active	<input type="checkbox"/>			5
Active	<input type="checkbox"/>			5
Active	<input type="checkbox"/>			31
Active	<input type="checkbox"/>			35
Active	<input type="checkbox"/>			35
Active	<input type="checkbox"/>			35
Active	<input type="checkbox"/>			55

- A new user permission was added to indicate whether a user type has user rights to edit the prescribing loans fields.
- If a user has permission to receive notifications for prescribing loans, they also have the ability to view the list. If not, they won't have access to the screen.





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