



## **Enhancements and New Features in V3.7:**

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### Webfin API amendments

Modified the Webfin API to include the following new calls:

- » Add & Edit Client.
- » Add & Edit Employer.
- » Add Client and Loan Statuses.
- » Post Loan.

# **Solution Web Applications**

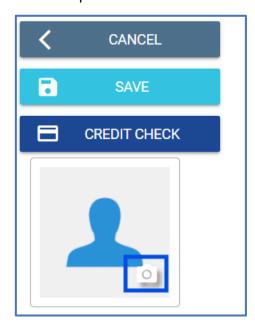
Modified Kwik Kadima to autofill saved login details on login and allow users to take photos using the device camera on client creation. See screenshots below:

Login details autofill:





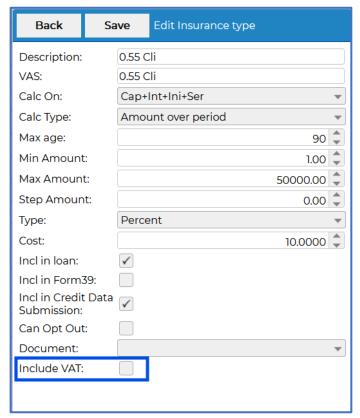
## Camera option on client creation:



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Added a new function to include VAT or exclude VAT from insurance calculation, this new functionality is placed on Webfin>Setup>Loans>VAS>Edit, see the screenshot below:

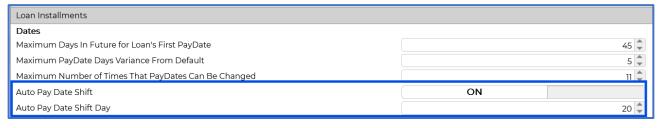




When the above highlighted option is off, VAT will be excluded from the insurance calculation and when it is on, VAT will be included on insurance calculation. This function can also be synced from our PAS system if the merchant makes use of PAS for insurance calculations.

## PayDate Shift to Next Month

Added a new function to auto move the first instalment to the next cycle for collections if the deadline for the current month has already been submitted to the banks. This function is placed as a setting on Webfin>Setup>Branch>Control>Loan Instalment. Please see the screenshot below:



If the Auto Pay Date Shift is Active then on all new loans and if the client's Pay date is set to after the shift override day (20th) then:

- » If current day of month is On or Before 20th then register the 1st pay date within the same month's pay date.
- » If current day of month is After the 20th then register 1st pay date to the next month's pay date.

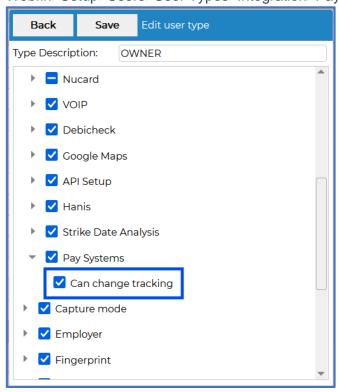


If the client's Pay date is set to before the shift override day (20th) then:

- » If current day of month is On or Before the 20th then register 1st pay date to the next month's pay date.
- » If current day of month is After the 20th then register 1st pay date to the next month's pay date.

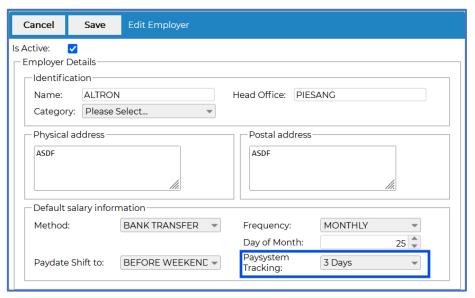
# Tracking Setting on Employer Maintenance

Added a new function to allow users the ability to change tracking days on Employer Maintenance screen. This function is driven by a user permission placed on Webfin>Setup>Users>User Types>Integration>Pay systems, see the screenshot below:



If he above user permission is assigned to the user, they'll have the ability to change tracking days days on Webfin>More>Employer Maintenance:



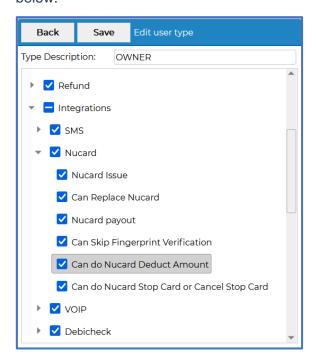


# Column Report Headers

Modified Webfin Reports column headers to display on all pages should the report data be more than one page

#### Deduct Amount on NuCard

Added a new function to deduct funds from a NuCard, this function is driven by a user permission on Webfin>Setup>User>User Types>Integrations>NuCard, see the screenshot below:

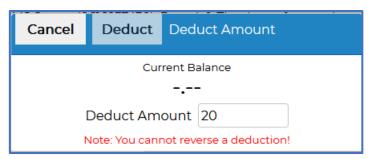




If the user is assigned this user permission, they have the ability to deduct funds from a NuCard on Webfin>Clients>Payout Options>NuCard, please see the screenshot below:



When a user clicks on the "Deduct Amount" button, the "Deduct Amount" pops up for the user to capture an amount to deduct from the NuCard as depicted in the screenshot below:



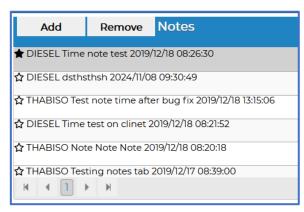
The user must capture an amount to deduct and click on the "Deduct" button to deduct the amount specified. Should there be no funds in the NuCard, an error message will pop up.

#### ID Number Validation for Zambia

Modified Webfin to allow validation of Zambian identity numbers on client creation and modification in the Zambian specified format of (6 digits/2 digits/1digit) eg. 114758/19/1.

#### Sometimes Someti

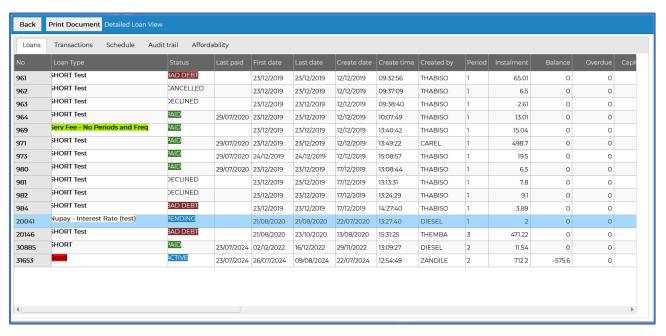
Added a new function to pin a note on Webfin. When a note is pinned is pinned, it will move to the top of the notes section and be first on the list of notes as depicted below:





## Detailed Loan View Readability

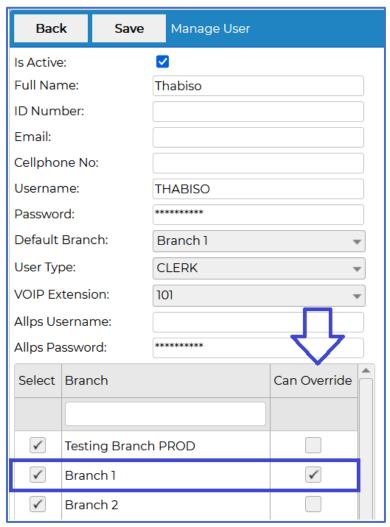
Enlarged the Detailed Loan View screen for better readability on Webfin>Client>Detailed Loan View. See the screenshot below:



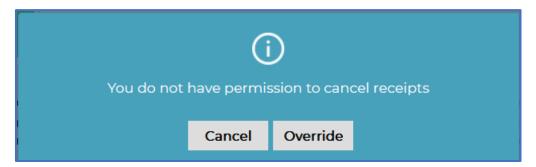
#### Permission to Override

Added a new function to override certain functions on Webfin, a user that does not have permission to perform some functions can submit a request to authorise a function to the user that has permission to override. A user that can override some functions must be assigned a branch on which they can override on Webfin>Setup>Users>Manage User, see the screenshot below:



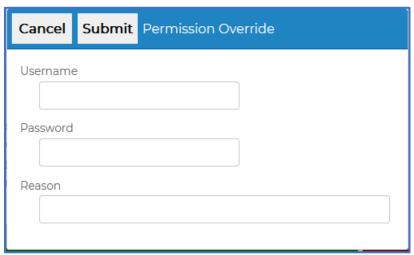


A user logs into Webfin and attempts to cancel a payment but they do not have permission to cancel a payment can send a request to authorise the cancellation of payment by clicking on "Cancel Payment" button and an override screen will pop up as shown on the screenshot below:



The "Override" button will pop up a "Permission Override" screen where a authorised user must capture their login details and a reason to authorise the transaction as shown in the screenshot below:





If the user has permission to override, the "Submit" button will open the "Cancel Payment" screen and the user will continue calling the payment. Should the user capture incorrect login detail an error message will pop up. Below is a list of functions that ca be overridden by an authorised user:

- » Cancel Payment.
- » Cancel Receipt.
- » Cancel Refund.
- » Client Fingerprint Registration.

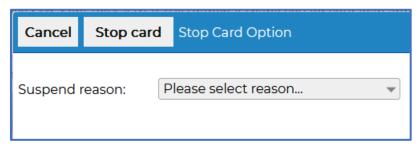
### NuCard Stop and Cancel Stop Function

Added a new function to stop a NuCard, this function will suspend a card for various reasons(stolen, lost etc.). This can be actioned on Webfin>Client>Payout Options>Nucard, see the screenshot below:

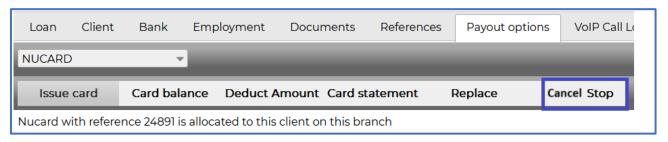


When the "Stop Card" button is clicked, the "Stop Card" screen will pop up and the user must then select a reason to stop the card to proceed. See the screenshot below:

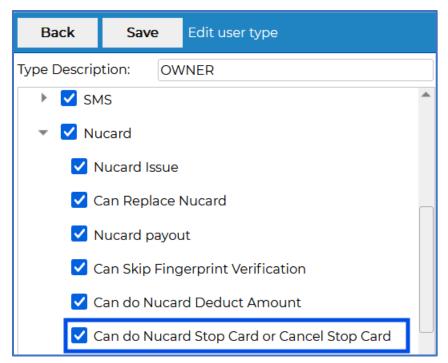




The "Stop Card" button will suspend the card. A suspended card can also be reactivated by a "Cancel Stop" function represented by a button as depicted in the screenshot below:

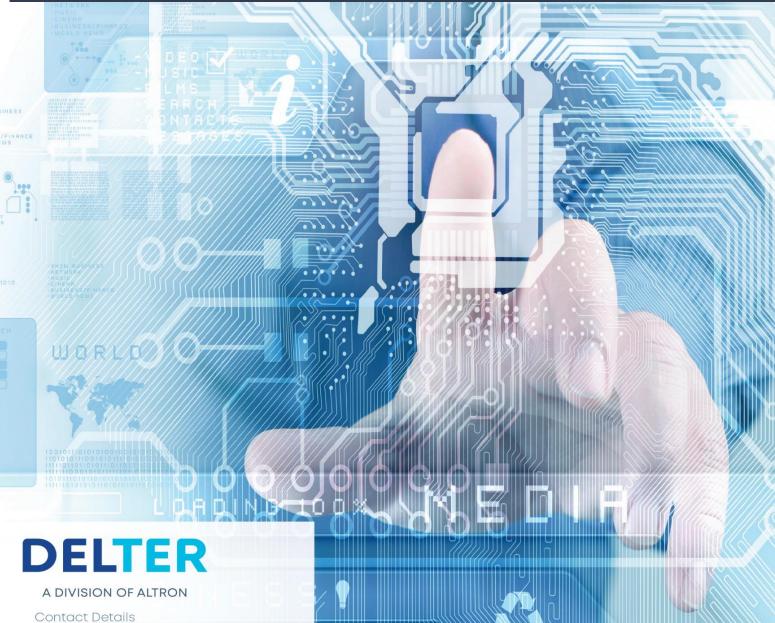


This button will pop up a "Cancel Suspend Card" screen where the user can reactivate the card. Both these above mentioned functioned a controlled by a user permission on Webfin>Setup>Users>User Types>Integrations>NuCard, see the screenshot below:



Users that are not assigned this user permission will not be able to perform the NuCard Stop Card and Cancel Stop Card functions.

End of Webfin V3.3.0 Changelog



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