



LoanPro Release Notes May 2018

INSTRUCTIONS: If you use any Simnang API, look at the “Breaking Changes to Current API” section to see what changes have been made that may “break” your current integration. If you are not an API user, then you’ll only need to look at “Significant Updates” to see what has been added or updated in the current release.

[Breaking Changes to Current API](#)

[Significant Updates](#)

[Features Changes or Enhancements](#)

[Database Changes](#)

[LoanPro is migrating to an Aurora MySQL database!](#)

[Tables Created](#)

[Tables Altered](#)

[Indexes Added](#)

Breaking Changes to Current API

- None

Significant Updates

PLEASE NOTE THAT THIS IS NOT A DETAILED LIST OF EVERY CHANGE THAT WAS MADE, BUT IS INTENDED TO BE A SUMMARY OF CHANGES THAT WERE MADE THAT WILL IMPACT OUR CLIENTS INTERACTION WITH THE SOFTWARE. IT IS STRONGLY RECOMMENDED THAT YOU FULLY TEST ALL DEPENDENT PROCESSES DURING THE STAGING RELEASE WINDOW.

Features Changes or Enhancements

- Microsoft Word (.docx) Support For Mail-House Templates
 - [Form templates created using Microsoft Word](#) can now be submitted for printing to the Connections mail-house service inside of LoanPro.
- Active and Inactive Documents
 - Both [loan](#) and [customer](#) documents can now be made active or inactive.
- Application
 - You now have the option to [enter custom CSS](#) to style the LoanPro application.
 - Applicants can now [add a payment profile](#) (credit/debit card or bank account) through the application.
 - [A custom message can be added](#) that will be shown when an applicant submits the application.
 - ZIP Codes can now be automatically decoded by the LoanPro application.
- New Rules Application
 - Some new Rules Applied have been added that can be run before a loan is activated. This includes the ability to use or create the following:
 - [Customer Tools](#)
 - [Loan Tools](#)
- [Multi-Factor Authentication](#)
 - LoanPro now provides the ability to have Agent Users enrolled for multi-factor authentication for login to LoanPro as mandated by recent security laws.
- User Dashboard
 - A [new dashboard](#) has been created that can be configured for each user.
- [Merchant Processor Groups](#)
 - This new feature will allow for the settings to determine what payment processor should be used to process a payment, rather than relying on the users selection. This is wired up to work with defaults, imports, rules applied, api posts, and UI functionality.
- Rules Applied Tab Inside a Loan

- There is a new tab inside a loan where all of the rules applied tabs applying on that loan have been moved.
- NACHA Batch ID Tracking
 - When payments are added to a NACHA file in PCI-Wallet, the ID of the NACHA file (Batch ID) will be sent from PCI Wallet to LoanPro so that payment batches can be tracked in both applications. This includes the ability to search by these Batch IDs in the Payments report in LoanPro, as well as to see it in the expanded stats of the payment details.
 - Callbacks can be configured from PCIW to LoanPro to update the transaction status.
- Checklist Variable
 - A new variable has been added to the context engine for checklist that includes the date an item was checked.
- [Webhooks](#)
 - Release of a new type of notification wired up to all Events & Triggers as an additional channel of notification of Webhooks

Database Changes

LoanPro is migrating to an Aurora MySQL database!

If you are a client with read only access to the database, this WILL change the endpoint at which you will access your database. However this is still fully MySQL compatible, you will not need to change your SQL Client, drivers, or queries - only the endpoint. (post production release).

Tables Created

merchant_processor_group_entity

merchant_processor_group__item_entity

dashboard_entity

dashboardwidget_entity

dashboard__dashboardwidget

rule_applied_account_tools_entity

loan__rule_applied_account_tools

rule_applied_customer_tools_entity

loan__rule_applied_customer_tools

rule_applied_autopay_entity

loan__rule_applied_autopay

rule_applied_loans_setup_entity

loan__rule_applied_loan_setup

dashboard_entity

dashboardwidget_entity

dashboard__dashboardwidget

dashboardpreferences_entity

web_hook_delivery_entity

Tables Altered

| Table | Change |
|------------------------------------|--|
| loan_settings_entity | merchant_processor_group_id column added |
| defaults_system_loan | merchant_processor_group_id column added |
| defaults_user_loan | merchant_processor_group_id column added |
| preconfigured_loan_settings_entity | merchant_processor_group_id column added |
| rule_applied_loan_settings_entity | merchant_processor_group_id column added |
| preconfigured_loan_entity | merchant_processor_group_id column added |
| loan_application_form_entity | priority column added |
| loan_application_form_entity | styles_text column added |
| loan_application_form_entity | submit_message column added |
| rule_applied_loan_settings_entity | exec_pre_activation column added |
| rule_applied__checklist_entity | exec_pre_activation column added |
| rule_applied_apd_reset_entity | exec_pre_activation column added |
| rule_applied_charge_off_entity | exec_pre_activation column added |

| | |
|-----------------------------------|----------------------------------|
| rule_applied_due_date_entity | exec_pre_activation column added |
| rule_applied_stop_interest_entity | exec_pre_activation column added |
| defaults_late_fee_buckets | parent_type column added |
| defaults_escrow_calculator | parent_type column added |

Indexes Added

Indexes for the lastUpdated field have been added for the following tables:

| |
|---|
| address_entity |
| charge_entity |
| checking_account_entity |
| checking_account_entity_token_update_backup |
| checklist_item_entity |
| collateral_entity |
| collateral_field_entity |
| credit_card_entity |
| custom_form_toolloan |
| customer_document_entity |
| customer_employer_entity |
| customer_entity |
| customer_payment_method_entity |
| customer_phone_entity |
| customer_reference_entity |
| customer_social_profile_entity |
| customer_status_entity |
| escrowtransactions |
| escrow_adjustment_entity |

escrow_calculator_entity

escrow_subset_entity

escrow_subset_options_entity

escrow_subset_options_entity_backup

escrow_transaction_entity

file_attachment_entity

holding_accountinvestor

holding_account_archive_entity

holding_account_autopay_entity

holding_account_category_entity

holding_account_settings_entity

holding_account_status_entity

holding_account_sub_status_entity

holding_account_transaction_category_entity

holding_account_transaction_entity

investmentportfolio

investmentsub_portfolio

investment_document_entity

investment_entity

investment_position_entity

investor_document_entity

investor_entity

investor_status_entity

linked_loan_option_entity

loancustomer

loanportfolio

loanrecurrent_charge

loanrule_applied_apd_reset

loanrule_applied_charge_off

loanrule_applied_checklist

loanrule_applied_duedate

loanrule_applied_settings

loanrule_applied_stop_interest

loansub_portfolio

loan_active_time_tx

loan_advancement_entity

loan_apd_adjustment_entity

loan_chargeofftransactions

loan_credit_entity

loan_curtail_date_entity

loan_delinquency_history_entity

loan_document_entity

loan_dpd_adjustment_entity

loan_duedate_change_entity

loan_entity

loan_funding_entity

loan_insurance_entity

loan_late_feebuckets

loan_modification_entity

loan_payment_seq

loan_promise_entity

loan_schedule_roll_entity

loan_settings_entity

loan_setup_entity

loan_sms_queue_item_entity

loan_status_entity

loan_stop_interest_date_entity

loan_sub_status_entity

loan_tx

paymentsub_portfolio

payment_account_entity

payment_reversed_tx_snapshot

recurring_charge_entity