



RELEASE NOTES - March, 2023

LoanPro's products are continuously improving, and we're excited to introduce the recent changes we've made to add functionality, improve performance, and make the user experience even better!

[Loan Management System \(LMS\)](#)

[New Features or Enhancements](#)

[API Changes](#)

[New Data Validations](#)

[Database Changes](#)

[Modified Tables](#)

[New Tables](#)

[Secure Payments](#)

[New Features or Enhancements](#)

Loan Management System (LMS)

Note: Many of the links in these release notes are to articles in our new help system. Please see the article [here](#) to gain access to our new help documentation.

New **Features** or **Enhancements**

- **Interest Rate Changes** - This feature allows you to change the interest rate on a loan on a specific date, without having to modify the loan or use a schedule roll. Interest Rate Changes can be included in Process Wizards. [Read More](#)
- **Charge Type Visibility** - If a payment applies to a charge or charges, the charge type is now visible in the application breakdown before the payment is made, and on the transactions report. [Read More](#)

- **Mail House Results** - The searchable information for the Mail House tool now includes results for all mail pieces. These results can be downloaded as a .CSV file. This will help when auditing the status of mail pieces. [Read More](#)
- **Agent User Export** - The list of agent users, and most information about the settings for each user can be downloaded as a .CSV file. This will help when auditing agent users and access within a company. [Read More](#)
- **Name Generated Document** - Custom forms that are generated and attached to loans as a document can now be given a name at the time they are generated. This will help distinguish the document from other similar documents attached to a loan. [Read More](#)
- **Enhanced Portfolio Search** - Loans can now be searched by whether they are associated with and/or not associated with specified portfolios, similar to searching by checklist items. This will help you more easily find the group of loans you're looking for. [Read More](#)
- **Loan Settings Interface Update** - The loan settings tab has been updated and has a new look and feel. This makes it easier to view and edit settings information. [Read More](#)
- **New Help System SSO** - LoanPro is moving to a new help system! Many articles can only be accessed after the user logs in. To log in, click the question mark icon in the main header inside LMS. Then click the "View Page" button under Product Guide in the modal window that appears. If you don't have a user, one will be created for you. The user will be set up to use the same credentials you use to log in to LMS. [Read More](#)
- **API Key Automatic Rotation** - API keys can now be set to automatically rotate. This increases the security of keys, but will also require that keys are updated anywhere they are used. [Read More](#)
- **Payment Variable Properties Added** -
 - last-payment-method - shows the payment method used (e.g. cash, check, card) for the last payment made. [Read More](#)
 - last-reversed-payment - shows information about the last reversed payment. Last reversed payment is the reversed payment with the most recent apply date, not the most recent logged or created date. [Read More](#)

API Changes

LMS is built on its own API, and we know many of our users rely on the API to create, read, and update the data it holds. The changes we make to the API were chosen deliberately in order to make things better for our users.

[Make Interest Rate Changes](#)

[Get Interest Rate Changes](#)

[Delete Interest Rate Changes](#)

New **Data Validations**

Data validations ensure that information sent to LMS through the API is formatted correctly. Occasionally it will be necessary to add validations for certain pieces of information. The release notes will always tell you what is changing.

No validations were added in this release.

Database Changes

Database changes affect users who have paid for a read-only copy of their tenant database. The changes shown here will be reflected in your database. Click the article links for new tables to see the structure of those tables and information they hold.

Modified Tables

multiple_returns_entity

- Column Modified: **name** varchar(120);

line_of_credit_swipe_entity

- Column Added: **original_auth_amount** DECIMAL(11, 2) DEFAULT 0.00
- Column Added: **settled_date** DATE
- Column Added: **settled_period_number** INT DEFAULT 0
- Column Added: **parent_swipe_id** INT(11) UNSIGNED
- Column Added: **card_id** INT(11) UNSIGNED
- Column Added: **merchant_processor_transaction_info_id** INT(11) UNSIGNED
- Column Added: **used_swipe_auth** TINYINT(1) DEFAULT 0
- ADD CONSTRAINT line_of_credit_swipe_FK_merchant_processor_transaction_info FOREIGN KEY (merchant_processor_transaction_info_id) REFERENCES merchant_processor_transaction_info_entity (id);

escrow_calculator_entity

- Column Modified: **percent percent** decimal(16,7) NOT NULL DEFAULT 0.00;

user_tenant_configuration

- Column Added: **quick_action_group_id** INT(11) UNSIGNED NULL DEFAULT NULL AFTER `user_account_configured`
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New Tables

- **loan_interest_rate_change_entity** - [Database – Payment Split Relationship Entity \(payment_split_relationship_entity\)](#)
- **quick_action_base_entity** - [Database – Quick Action Base Entity \(quick_action_base_entity\)](#)
- **card_entity** - [Database – Card Entity \(card_entity\)](#)
- **merchant_processor_transaction_info_entity** - [Database – Merchant Processor Transaction Info \(merchant_processor_transaction_info_entity\)](#)
- **quick_action_checklist_setup_entity** - [Database – Quick Action Checklist Setup \(quick_action_checklist_setup_entity\)](#)
- **quick_action_sequence_entity** - [Database – Quick Action Sequence \(quick_action_sequence_entity\)](#)
- **quick_action_execution_process** - [Database – Quick Action Execution Process \(quick_action_execution_process\)](#)
- **quick_action_group_entity** - [Database – Quick Action Group \(quick_action_group_entity\)](#)
- **quick_action_group_action** - [Database – Quick Action Group Actions \(quick_action_group_action\)](#)

- **quick_action_delivery_setup_entity** - [Database – Quick Action Delivery Setup \(quick_action_delivery_setup_entity\)](#)
- **quick_action_payment_setup_entity** - [Database – Quick Action Payment Setup \(quick_action_payment_setup_entity\)](#)
- **quick_action_autopay_setup_entity** - [Database – Quick Action AutoPay Setup \(quick_action_autopay_setup_entity\)](#)

Secure Payments

New **Features** or **Enhancements**

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