



## LoanPro Release Notes September 2020

**INSTRUCTIONS:** If you use any LoanPro API, look at the **Breaking Changes to Current API** section to see what changes have been made that may affect your current integration. If you are not an API user, look at **Significant Updates** to see what has been added or updated in the current release.

[Breaking Changes to Current API](#)

[Additional Validations](#)

[Significant Updates](#)

[Features Changes or Enhancements](#)

[Database Changes](#)

[Modified Tables](#)

[New Tables](#)

[Secure Payments \(Formerly PCI Wallet\) Release Notes September 2020](#)

[Significant Updates](#)

[New or Enhanced Functionality](#)

## **Breaking Changes to Current API**

None

## **Additional Validations**

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**

- **New Look.** See and enjoy our new user experience! We've made major changes to the look and feel of our application, to make it look less cluttered, more intuitive, and easier to use. [Article Link](#)
- **Main Menu Moved to Top.** In order to make navigation of the main menu easier, we have moved it to the top of the page. [Article Link](#)
- **New Collector Queue Wizard.** We rebuilt the Collector Queue to increase the speed of navigation. We also added a queue-creation wizard and options that let you assign the queue to multiple agent users, assign work in the queue using a tag-team strategy or by a percentage of the loans, make the queue static or dynamic, and more. [Article Link](#)
- **Canada 900 Return Codes.** Now you can configure LoanPro to take specific actions (e.g. disable payment profile) based on reject codes received for Canadian bank payments. [Article Link](#)
- **Timezone visibility for autopays.** The tenant timezone is now displayed in the AutoPay manager and summary, as well as when scheduling an AutoPay and in system notes for an AutoPay. [Article Link](#)

- **Repay ACH Processor in LoanPro.** Now you can configure your Repay ACH payment processor account in LoanPro as well as in PCI Wallet. [Article Link](#).
- **New option to set 'Do Not Call' on phone number from the summary page.** Now you can enable/disable this option from the summary section of the customer, without having the need to go to the Edit mode to do this change. [Article Link](#).
- **Expand Source Company details on Loan Settings tab.** We've added a shortcut to display more information related to the source company in Loan Settings tab, so you don't need to navigate outside this tab to see source company details. [Article Link](#)
- **Promises Report Improvements.** The report now shows new search filters and multiple visual elements that will help you to manage better promises and their effectiveness. [Article Link](#)
- **Speed Enhancements.** Speed enhancements have been made for multiple pages in LoanPro.
- **Bank Account Information** - Account information (not credit card information) is now synced between the LoanPro and Secure Payments databases, so that bank account numbers and routing numbers can be queried directly through LoanPro's database. [Article Link](#)

## Database Changes

### Modified Tables

- Table Name: **custom\_form\_entity**

**Modification:**

Added Column: **extracted\_variables** (Data Type: longtext)

- Table Name: **customer\_employer\_entity**

**Modification:**

Added Index: **index\_index\_pay\_date\_idx** (on column pay\_date)

- Table Name: **loan\_collector\_queues**

**Modification:**

Added Column: **callback\_url** (after field user\_id) (Data Type: text)

- Table Name: **loan\_collector\_queue\_work\_items**

**Modifications:**

Added Column: **loan\_display\_id** (after field loan\_id) (Data Type: **char(25)**, **not null, default ""**)

Added Column: **checklist** (after field notes) (Data Type: text)

Added Column: **checklist\_as\_string** (after field checklist) (Data Type: text)

Added Column: **score** (after field checklist\_as\_string) (Data Type: int(11), unsigned, not null, default 0)

Added Column: **agent\_full\_name** (after field agent\_id) (Data Type: varchar(255))

- TABLE Name: **checking\_account\_entity**

**Modifications:**

Added Column: **account\_number** (after field account\_type) (Data Type: varchar(100), Default NULL)

Added Column: **routing\_number** (after field account\_number) (Data Type: varchar(100), Default NULL )

- TABLE Name: **loan\_collector\_queue\_agents**

**Modifications:**

Column Altered: **work\_percentagecallback\_url** changed from int(11) to decimal(5,2)

## **New Tables**

- Table Name: **loan\_collector\_queues**

Columns:

**id**, int(11), unsigned, NOT NULL, AUTO\_INCREMENT

**title**, varchar(500), NOT NULL

**type**, varchar(50), NOT NULL

**strategy**, varchar(50), NOT NULL

**agents\_list**, text, DEFAULT NULL

**feed\_type**, varchar(50), NOT NULL

**feed\_content**, text

**loan\_count**, int(11), NOT NULL, DEFAULT '0'

**status**, varchar(50), NOT NULL

**status\_message**, varchar(255)

**sort\_by**, char(24), DEFAULT NULL

**order\_by**, char(24), DEFAULT NULL

**started**, datetime, DEFAULT NULL

**completed**, datetime, DEFAULT NULL

**user\_id**, int(11), unsigned NOT NULL

**active**, tinyint(1), NOT NULL, DEFAULT '1'

**deleted**, tinyint(4), NOT NULL, DEFAULT '0'

**created**, timestamp, NOT NULL, DEFAULT CURRENT\_TIMESTAMP

**lastUpdated**, timestamp, NOT NULL, DEFAULT CURRENT\_TIMESTAMP, ON UPDATE CURRENT\_TIMESTAMP

PRIMARY KEY ( **id** )

FULLTEXT INDEX **agents\_list\_idx** (agents\_list)

- Table Name: **loan\_collector\_queue\_agents**

**Columns:**

**id**, int(11), unsigned, NOT NULL, AUTO\_INCREMENT

**collector\_queue\_id**, int(11), unsigned, NOT NULL

**agent\_id**, int(11), NOT NULL

**agent\_fullname**, varchar(255), DEFAULT NULL

**work\_percentage**, int(11), NOT NULL

**sort\_by**, varchar(255), DEFAULT NULL

**order\_by**, varchar(255), DEFAULT NULL

**active**, tinyint(1), NOT NULL, DEFAULT '1'

**deleted**, tinyint(4), NOT NULL, DEFAULT '0'

**created**, timestamp, NOT NULL, DEFAULT CURRENT\_TIMESTAMP

**lastUpdated**, timestamp, NOT NULL, DEFAULT CURRENT\_TIMESTAMP, ON UPDATE CURRENT\_TIMESTAMP

PRIMARY KEY ( **id** )

KEY ( **collector\_queue\_id** )

KEY ( **agent\_id** )

CONSTRAINT FOREIGN KEY ( **collector\_queue\_id** ) REFERENCES **loan\_collector\_queues** ( **id** ), ON DELETE CASCADE

- Table Name: **loan\_collector\_queue\_feed\_uploads**

**Columns:**

**Id**, int(11), unsigned, NOT NULL, AUTO\_INCREMENT

**collector\_queue\_id**, int(11), unsigned, DEFAULT NULL

**file\_object\_key**, varchar(255), DEFAULT NULL

**file\_object\_bucket**, varchar(255), DEFAULT NULL

**file\_attachment\_id**, int(11), NOT NULL, DEFAULT '0'

**status**, varchar(255) DEFAULT "

**status\_message**, text

**row\_count**, int(11), NOT NULL, DEFAULT '0'

**user\_id**, int(11), NOT NULL

**created**, timestamp, NOT NULL, DEFAULT CURRENT\_TIMESTAMP

**lastUpdated**, timestamp, NOT NULL, DEFAULT CURRENT\_TIMESTAMP, ON UPDATE CURRENT\_TIMESTAMP

**deleted**, tinyint(4), NOT NULL, DEFAULT '0'

PRIMARY KEY ( **id** )

KEY ( **collector\_queue\_id** )

CONSTRAINT FOREIGN KEY ( **collector\_queue\_id** ) REFERENCES **loan\_collector\_queues** ( **id** ), ON DELETE CASCADE

CONSTRAINT FOREIGN KEY ( **file\_attachment\_id** ) REFERENCES **file\_attachment\_entity** ( **id** ), ON DELETE CASCADE

- Table Name: **loan\_collector\_queue\_work\_queues**

**Columns:**

**id**, int(11), unsigned, NOT NULL, AUTO\_INCREMENT

**collector\_queue\_id**, int(11), unsigned, NOT NULL

**loan\_count**, int(11), NOT NULL

**status**, varchar(50), NOT NULL

**queue\_key\_identifier**, varchar(200), NOT NULL

**started**, datetime, DEFAULT NULL

**completed**, datetime, DEFAULT NULL

**active**, tinyint(1), NOT NULL, DEFAULT '1'

**deleted**, tinyint(4), NOT NULL, DEFAULT '0'

**created**, timestamp, NOT NULL, DEFAULT CURRENT\_TIMESTAMP

**lastUpdated**, timestamp, NOT NULL, DEFAULT CURRENT\_TIMESTAMP, ON UPDATE CURRENT\_TIMESTAMP

PRIMARY KEY ( **id** )

KEY ( **collector\_queue\_id** )

KEY ( **queue\_key\_identifier** )

CONSTRAINT FOREIGN KEY ( **collector\_queue\_id** ) REFERENCES **loan\_collector\_queues** ( **id** ), ON DELETE CASCADE

- Table Name: **loan\_collector\_queue\_work\_queue\_agents**

**Columns:**

**id**, int(11), unsigned, NOT NULL, AUTO\_INCREMENT

**collector\_queue\_id**, int(11), unsigned, NOT NULL

**agent\_id**, int(11), unsigned, NOT NULL

**agent\_fullname**, varchar(255), DEFAULT NULL

**work\_queue\_id**, int(11), unsigned, NOT NULL

**start**, datetime, NOT NULL

**last\_activity**, datetime, NOT NULL

**active**, tinyint(1), NOT NULL, DEFAULT '1'

**deleted**, tinyint(4), NOT NULL, DEFAULT '0'

**created**, timestamp, NOT NULL, DEFAULT CURRENT\_TIMESTAMP

**lastUpdated**, timestamp, NOT NULL, DEFAULT CURRENT\_TIMESTAMP, ON UPDATE CURRENT\_TIMESTAMP

PRIMARY KEY ( **id** )

KEY ( **collector\_queue\_id** )



KEY (**work\_queue\_id**)

KEY (**agent\_id**)

CONSTRAINT FOREIGN KEY (**collector\_queue\_id**) REFERENCES  
**loan\_collector\_queues** (**id**), ON DELETE CASCADE

CONSTRAINT FOREIGN KEY (**work\_queue\_id**) REFERENCES  
**loan\_collector\_queue\_work\_queues** (**id**), ON DELETE CASCADE

- Table Name: **loan\_collector\_queue\_work\_items**

**Columns:**

**id**, int(11), unsigned, NOT NULL, AUTO\_INCREMENT

**collector\_queue\_id**, int(11), unsigned, NOT NULL

**work\_queue\_id**, int(11), unsigned, NOT NULL

**loan\_id**, int(11), unsigned, NOT NULL

**agent\_id**, int(11), unsigned, NOT NULL

**notes**, text

**status**, varchar(50), NOT NULL

**created**, timestamp, NOT NULL, DEFAULT CURRENT\_TIMESTAMP

**completed**, timestamp, NOT NULL, DEFAULT CURRENT\_TIMESTAMP

**last\_activity**, timestamp, NOT NULL, DEFAULT CURRENT\_TIMESTAMP

**lastUpdated**, timestamp, NOT NULL, DEFAULT CURRENT\_TIMESTAMP, ON  
UPDATE CURRENT\_TIMESTAMP

**deleted**, tinyint(1), NOT NULL, DEFAULT '0'

PRIMARY KEY ( **id** )

KEY (**collector\_queue\_id**)

KEY (**work\_queue\_id**)

KEY (**loan\_id**)

KEY (**agent\_id**)

CONSTRAINT FOREIGN KEY (**loan\_id**) REFERENCES **loan\_entity (id)**, ON DELETE CASCADE

CONSTRAINT FOREIGN KEY (**collector\_queue\_id**) REFERENCES **loan\_collector\_queues (id)**, ON DELETE CASCADE

CONSTRAINT FOREIGN KEY (**work\_queue\_id**) REFERENCES **loan\_collector\_queue\_work\_queues (id)**, ON DELETE CASCADE

UNIQUE CONSTRAINT **work\_item\_unique**, UNIQUE (**collector\_queue\_id, work\_queue\_id, loan\_id**)

- Table Name: **loan\_collector\_queue\_time\_tracking**

**Columns:**

**id**, int(11), unsigned, NOT NULL, AUTO\_INCREMENT

**collector\_queue\_id**, int(11), unsigned, NOT NULL

**work\_queue\_id**, int(11), unsigned, NOT NULL

**agent\_id**, int(11), unsigned, NOT NULL

**work\_item\_id**, int(11), unsigned, NOT NULL

**time\_spent**, int(11), unsigned, NOT NULL

**created**, timestamp, NOT NULL, DEFAULT CURRENT\_TIMESTAMP


PRIMARY KEY ( **id** )

FOREIGN KEY (**collector\_queue\_id**) REFERENCES **loan\_collector\_queues (id)**

FOREIGN KEY (**work\_queue\_id**) REFERENCES **loan\_collector\_queue\_work\_queues (id)**

FOREIGN KEY (**work\_item\_id**) REFERENCES **loan\_collector\_queue\_work\_items (id)**,

KEY **time\_spent\_by\_agent** (**collector\_queue\_id, work\_queue\_id, agent\_id, work\_item\_id**)



# Secure Payments (Formerly PCI Wallet)

## Release Notes September 2020

### **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.

### **New or Enhanced Functionality**

- Bug Fixing and Speed improvements.
- Renewal of PCI DSS Level 1 AOC & Penetration Testing