



THE LOANPRO API

CUSTOM FIELDS

loanprosoftware.simnang.com

API SAMPLE

Fork Custom Fields — <https://plnkr.co/edit/ywHzoj>

CAUTIONARY NOTE

The provided API samples store API credentials in the browser
Use the API samples to explore the API and not as your integration

WHAT ARE CUSTOM FIELDS?

- Custom fields let you store/track data that LoanPro doesn't track natively
 - e.g. If you want to track customer hair color, you can make a custom field
- Custom fields are defined in Tenant Settings
- Custom field values are stored in a related, but separate entity
- Custom fields can be created for loans, customers, etc.
- Custom field values will be different for individual loans, customers, etc.

API ENDPOINT

Custom field values are set through PUT requests
to the parent (or attached) entity

Customers:

`https://loanpro.simnang.com/api/public/api/1/odata.svc/Customers(<id>)`

Loans:

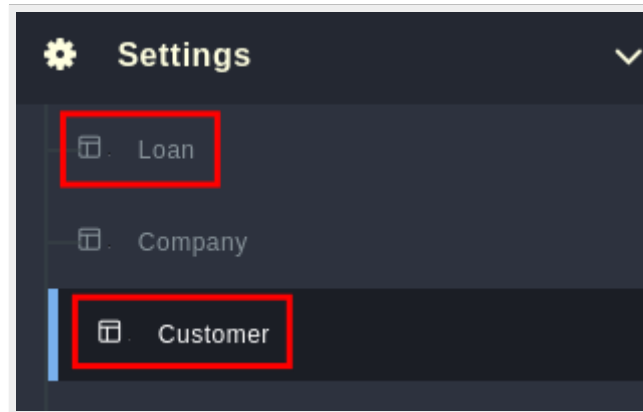
`https://loanpro.simnang.com/api/public/api/1/odata.svc/Loans(<id>)`

etc.

DEFINING THE CUSTOM FIELDS

The first step is to define the fields themselves





- This is done through the UI
 - For Loans, go to Settings > Loan
 - For Customers, go to Settings > Customer
- Click the green "+ Add" button in the upper right



GETTING THE ID OF CUSTOM FIELDS

- Custom field IDs are displayed in the UI
 - These IDs will be important later

The screenshot shows a web application interface for managing custom fields. The breadcrumb navigation is 'Customer > Custom Fields > Customer Fields'. There is a '+ Add' button in the top right corner. On the left, there is a sidebar with a dropdown menu for 'Custom Fields' and three sub-items: 'Customer Fields' (selected), 'Labeling', and 'Brackets'. In the top right of the main content area, there are two buttons: 'Customer Info' and 'Employer'. Below these, the word 'Active' is displayed. A table lists the active custom fields. The table has the following columns: ID, Import ID, Field name, Field type, Required, Max Length Value, Search, Data Export Report, Credit report, Popover display, Order, and Active. The row for 'Hair Color' (ID 4) is highlighted with a red border. The 'Required' column for this row contains a green 'Yes' button, while others are grey 'No' buttons. The 'Active' column contains a green 'Yes' button. The 'Order' column shows a yellow '2' with up and down arrows.

ID	Import ID	Field name	Field type	Required	Max Length Value	Search	Data Export Report	Credit report	Popover display	Order	Active	
3	cf3	Customer Sample Field	Text	No	50	No	No	No	No	1	Yes	 
4	cf4	Hair Color	Text	Yes	50	No	No	No	No	2	Yes	 

- The ID of customer hair color is 4, so that is what we'll use

WHY DON'T THE IDS START AT 0 OR 1?

All of the custom field settings share the same table, so when a custom field is created for loans it will affect the numbering of new custom fields for customers and vice versa. In the example tenant, two custom fields were created for loans before they were created for customers, so even though the numbering did start at 1 it looks like it started at 3.

Also, the database we're using decided to start at 1 and not 0. We're just as upset about it as you are.

SAVING THE CUSTOMER'S HAIR COLOR

To save the hair color for customer 3, send a PUT request to the endpoint `odata.svc/Customers(3)*` with the following payload:

```
{
  "CustomFieldValues": {
    "results": [
      {
        "customFieldId": 4,
        "customFieldValue": "Blonde"
      }
    ]
  }
}
```

* full URL is [https://loanpro.simnang.com/api/public/api/1/odata.svc/Customers\(3\)](https://loanpro.simnang.com/api/public/api/1/odata.svc/Customers(3))

CHANGING THE CUSTOMER'S HAIR COLOR

To change the change the hair color for customer 3, send a PUT request to the endpoint `odata.svc/Customers(3)*` with the following payload:

```
{
  CustomFieldValues: {
    results: [
      {
        "customFieldId": 4,
        "customFieldValue": "Brunette",
        // ID of existing CustomFieldValue
        "id": 4,
        "__update": true,
        "__id": 4
      }
    ]
  }
}
```

* full URL is [https://loanpro.simnang.com/api/public/api/1/odata.svc/Customers\(3\)](https://loanpro.simnang.com/api/public/api/1/odata.svc/Customers(3))

OTHER ENTITIES

For other entities, send a PUT request to the endpoints for those entities

PUT [https://loanpro.simnang.com/api/public/api/1/odata.svc/Loans\(2\)](https://loanpro.simnang.com/api/public/api/1/odata.svc/Loans(2))

```
{
  "LoanSetup": {
    "CustomFieldValues": {
      "results": [
        {
          "customFieldId": 1,
          "customFieldValue": "240.00",
          "__id":3,
          "__update":true
        }
      ]
    },
    "__id":2,
    "__update":true
  },
  "__id":2,
  "__update":true
}
```

QUESTIONS?

Feel free to ask in our [Forums](#)

Or, email us at support@simnang.com