

LoanVantage API™

Let's be honest. Rekeying data is time-consuming, opens the door for errors, and directly affects your bottom line as employees spend time on manual entry rather than revenue-generating activities. That's why the LoanVantage API was developed: to help efficiency-conscious banks and credit unions bring application data collected in third-party Customer Relationship Management (CRM) systems directly into LoanVantage.



Efficient, Time-Saving Data Transfer

Why rekey when you can automate? Bring data from third-party applications like CRM systems directly into LoanVantage.



Supports Application Information and Collected Documents

Bring key application data directly into LoanVantage, including supporting documentation submitted by the applicant.



Avoid Duplicate Entries

The API uses programmatic logic to look for duplicate Tax Identification Numbers (TINs) in LoanVantage to avoid creating duplicate profiles – and confusion.

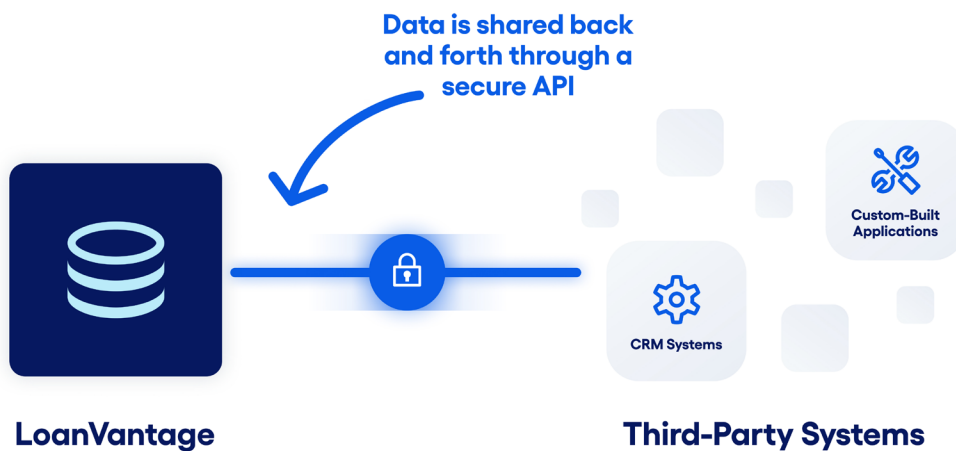
LoanVantage API

We all know that efficiency is paramount in today's highly competitive environment, where thin margins push everyone to uncover better ways of working. It's why we believe that rekeying data from third-party CRM solutions or custom-built online loan applications into LoanVantage should be a thing of the past.

The LoanVantage API uses secure, industry-standard REST API protocols to help banks and credit unions exchange application data quickly and securely between third-party applications and LoanVantage.

let technology do the heavy lifting

With the LoanVantage API in place, data flows directly from your third-party loan application systems into LoanVantage, automating your processes and saving you time and manual entry.



Explore the Possibilities

With the LoanVantage API, you're opening the door to more automated processes with third-party vendors or custom-built applications. So whether you want to collect application data in your CRM, or are using a front-end applicant experience that you built-in house, the API can help you get the data from outside systems into LoanVantage.

API functionality

Specific to LoanVantage, this API is laser-focused on applications and supporting documents. Here's a look at the available calls, with more information about each one available on our [developer portal](#).

Call Type	API Call	Description
GET	Application	API to retrieve metadata about an application record from the LoanVantage Application Staging tables. For security purposes, it returns limited applicant information.
	Document	API to retrieve a document record. Note: This services does not return the actual document instance but rather metadata about the document such as status and due date. Note: <i>isPortalEnabled</i> indicates whether the document is intended to be shown on a customer-facing document portal. If this flag is False then the document record should not be displayed to an end-customer.
PUT	Document	API to update a document record with the actual document instance if it was not provided on the Document Post operation. This service is not intended to allow updates of other document attributes such as status, as the document record is managed by LoanVantage.
POST	Application	API to create a new application record in the LoanVantage Application Staging tables.
	Document	API to create a new document record. This service currently works to link a document record to an Application or Applicant. Note: The actual document file is an optional structure and thus this operation can be used to create a document record placeholder and the actual document can be provided later using the LoanVantage/updated documents operation.

Security's Tight

We all know that loan applications include a pile of non-public personal information. That's why the API protects applicants' privacy with very limited data available to be returned to the third-party providers via GET calls, helping you run a tight ship.

Duplicate Prevention

Avoid those frustrating duplicate records with programmed logic that looks for matching TINs in the application data to avoid creating duplicate party records. With that feature as a safeguard, your team will find the new relationships and parties they expect in LoanVantage and nothing extra.

getting started

With publicly available documentation on [Jack Henry's Developer Portal](#), it's easy to kick off a project with our team.

Banks and Credit Unions

If your custom application was built in-house by your bank or credit union and not part of a third-party solution, getting started with this optional purchase is a breeze. Just reach out to your account executive to kick off the process and head to the developer portal to dive into the API documentation.

Third-Party Vendors

Any third-party vendors providing CRM or other technologies that you're using to collect application data will need to participate in (and be vetted through) Jack Henry's Fintech Integration Network (FIN) to ensure application data privacy and security. They can head straight to the [FIN resource page](#) to learn more or submit a contact us form to get started.

Need More Technical Assistance?

Implementing the LoanVantage API does require technical expertise and the ability for the institution or its third-party vendor to write code to integrate with the API. While some banks and credit unions will have this talent already on staff, we know that others may choose to outsource more technical work to vendors of your choice.

For those who need a bit more assistance, Jack Henry's Developer Relations team offers several support options. Financial institutions and third parties are welcome to attend monthly [Developer Office Hours](#), post questions on [Stack Overflow](#), or contract for paid assistance through the [Technical Account Manager \(TAM\)](#) program.

The Process

Preparation for implementation will require 60 days or longer in order to obtain credentials from the jXchange team. The remainder of the implementation schedule hinges on the receipt of this information. Once credentials are received and shared with the project team, the remainder of the project's tasks can be scheduled. The implementation schedule will also be dependent on the availability of the technical resources responsible for setting up the API calls to LoanVantage.

tap into API-powered automation

Let's talk about this together. lendinginfo@jackhenry.com

For more information about Jack Henry, visit jackhenry.com.