IOU MCA App Integration

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Document History

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### Introduction

The document gives an overview of features provided by IOU API and its integration with Salesforce. The document also highlights the various API calls provided by IOU API which are available to consume in external applications.

### API Capabilities

IOU API provides the following functionalities via the API which would require custom Apex code development for integrating the MCA App.

* Loan Calculator
* Create User
* Get User
* Create Loan Request
* Get Loan Request
* Submit Loan Request for Prequal
* Get Loan Agreements
* Get Loan Agreement Body
* Upload Attachments
* Get Loan Attachments
* Get Loan Attachment Body

### Limitations

* Paid feature (Pricing details are unavailable on the website)

### Requirements

The following requirements have been identified for the IOU integration

* ISOs using MCA should be automatically be able to submit Funding Deals to IOU
* Automatically receive statuses of Submitted Applications

### Integration Details

IOU provides REST services, to leverage its existing functionalities in the credit funding domain. The details for the IOU API are as mentioned below.

* **IOU API Type** – REST
* **API Return Format** – JSON (JavaScript Object Notation)
* **Recommended Solution Approach –** CustomHttp Callout based Integration

### Estimates

The ballpark effort estimates for the implementation would be as follows.

**Development Effort Summary**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **#** | **Category** | **Requirement** | **High Level Solution** | **Ballpark Effort (Hrs.)** |
| IOU-1 | IOU Integration | ISO should be able to automatically submit the Deals IOU | Apex trigger on Opportunity that submits the records to IOU when a particular Opportunity Stage is set or an Opportunity with that Stage is created | **24** |
| IOU-2 | IOU Integration | Get status of submitted Loan Requests | Custom Apex code to retrieve the Loan Request status based on the Loan ID | **36** |
| **Total Effort (Hrs.)** | | | | **60** |

|  |  |  |  |
| --- | --- | --- | --- |
| **Engagement Effort Summary** | | | |
| **No** | **Project Phase** | **%** | **Efforts (Hrs)** |
| 1 | Project Management | 8% | 9 |
| 2 | RA & Solution Design | 15% | 6 |
| 3 | Development & Unit testing | 70% | 68 |
| 4 | Integration and System Testing | 0% | 0 |
| 5 | Deployment & Documentation | 7% | 4 |
| 6 | UAT Support, Go-Live |  | 4 |
| 7 | Live rollout support [warranty period 2 weeks] |  | 0 |
| **Total Project Efforts** | | 100% | **97** |
| **Total Engagement Efforts** | |  | **101** |

### Queries

The queries associated with the above mentioned requirements are as follows

* What stage on the Opportunity would indicate that the Deal needs to be submitted to IOU?
* What is the average volume of Deals that would be submitted to IOU on a daily basis?
* Would this integration to be implemented separately as an Enterprise Services implementation or would it be a part of the MCA Managed Package?
* How would the status for a Created Loan Request be queried from IOU? Would this be done by a user manually using a button or would it be done implicitly using a daily / fortnightly batch job?

### References

* http://www.ioucentral.com/