



# Mateo+

## Mateo Release 1.6

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### June 1, 2021

This latest release of Mateo features several key functionality, usability and security related enhancements. Support has been added for the creation on non-sequenced savings and loan accounts, allowing users to create their own account numbers using any format or pattern needed. In addition, more extensive API support has been added for customers using the location dimension within Intacct.

On the usability side, we've added flexibility around the use of customer contact information, as well as transaction comments, providing customers greater control in these areas of the software. We've also created some configurable default settings to streamline transaction entry and added more advanced encryption of underlying configuration settings.

Lastly, we have added a new customizable portfolio report (for savings and loans) which now allows for custom date range filtering, as well as specific customer and entity level reporting. We hope you find these new features as useful as we anticipate and know that we are always working to improve the Mateo software and user experience for our valued clients.

The full list of enhancements can be located on page 2



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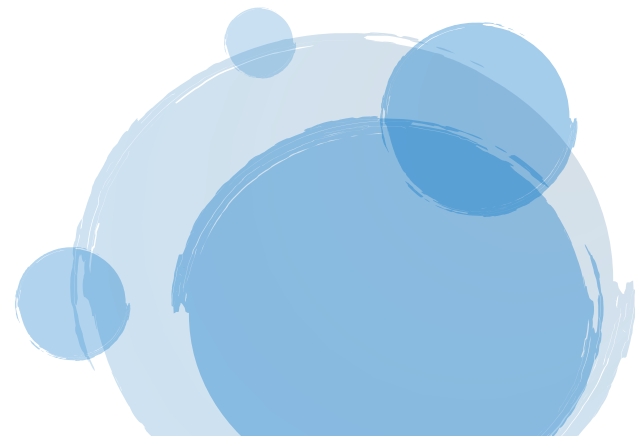
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- **Reporting:**
  - New customizable savings and loan portfolio reports, including custom date range and customer filtering
- **Savings and Loan Account Class:**
  - Allow for the creation on non-sequenced savings and loan accounts, allowing users to create their own account numbers using any format or pattern needed
- **Environment Configuration**
  - The Web Services User, enabling API functionality with Sage Intacct is now editable by System and Business Administrators
  - Default Payment Method now configurable
- **Other enhancements**
  - Comments no longer required when entering transactions
  - Auto-populate attachment name when uploading attachment
  - Changes to loan payments screen to enhance usability, including auto-populating principal and interest amounts
  - Customer Setup - First and Last Name no longer required
  - Encryption of API configuration settings
  - Various minor bug fixes
  - Validation enhancements and screen dynamic responsiveness implemented to further improve user experience.