

CONNECTION GUIDE

Connecting Your AI Assistant to LoanBoss

The LoanBoss MCP Server lets your AI assistant — Claude, ChatGPT, or any Model Context Protocol client — query your LoanBoss portfolio directly, in natural language. You connect by signing in with your LoanBoss account. There is no API key to request or store. The one exception is Microsoft 365 Copilot (see below).

Connect in four steps

- 1 In your assistant's connector settings, add a custom connector pointing at the LoanBoss endpoint below.
- 2 Your assistant sends you to LoanBoss to sign in. Enter your normal credentials and complete multi-factor authentication.
- 3 A consent screen names the application requesting access and the address it will return you to. Review it, then approve.
- 4 Your assistant reports the connection as active and the LoanBoss tools appear in its tool list.

Endpoint. <https://mcpserver.loanboss.com/mcp>

What the connection gives you

Permission mirroring	The connection is bound to your LoanBoss user, so every answer is scoped to exactly the deals, loans, and data you can already see in the app — nothing more.
Read-only	The assistant reads your portfolio. It cannot create, edit, or delete anything in LoanBoss.
No stored credentials	Sign-in uses the same login and multi-factor flow as the LoanBoss app and issues a short-lived token. There is no key to rotate or protect.
Disconnect any time	Remove the LoanBoss connector in your assistant. Access stops immediately.

What you can ask about

Your assistant gets **76 read-only tools** across your portfolio. Ask in plain language; it selects the right ones.

Deals search, groups, deal-level metrics	Covenants by loan, plus references and templates
Loans records, versions, tranches, provisions, maturities	Market data rate indexes, forward and treasury curves
Properties records, metrics, collateral and asset types	Debt valuation valuation reports and settings
Hedges caps, swaps, collars, corridors, floors	Calculators cap pricing, prepayment penalty
Cashflows loan, hedge, escrow, draws, paydowns	Custom fields definitions and values
Escrow accounts, types, draws, escrow metrics	Reminders notification rules and upcoming reminders

Using Microsoft 365 Copilot? Copilot can't register itself, so LoanBoss issues your company a one-time client ID and secret before step 1. Ask your LoanBoss contact to set it up; the full MCP Server Reference has the admin steps. **Connection not completing?** Remove the connector and add it again. If it still fails, contact LoanBoss.