

Loan NEXTM

Add New Products

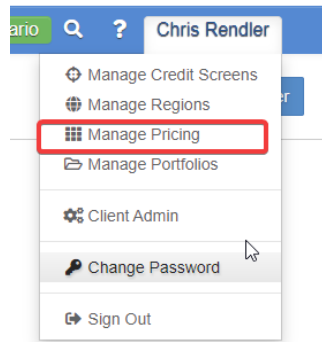
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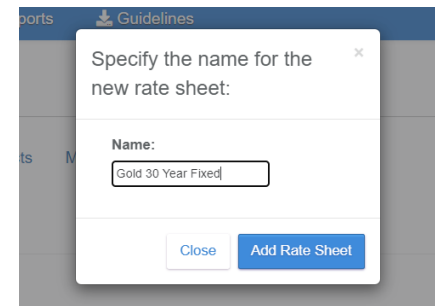
Add Rate Sheet

1. Manage Pricing-> Rate Sheets



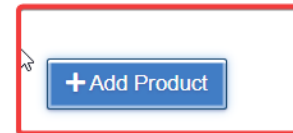
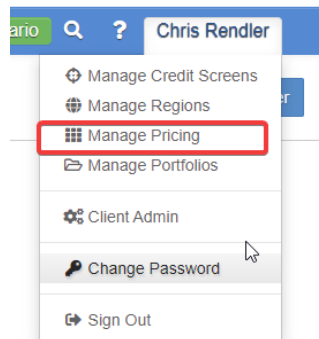
1. Add New Rate Sheet

2. Select Save



Add Products

1. Manage Pricing
2. Products->Add Product



Product Name	Product Typ
0101.Advantage 30 Year Fixed	30 Yr. Fixed
0102.Advantage 30 Year Fixed IO	30 Yr. Fixed
0103.Advantage 40 Year Fixed	30 Yr. Fixed

Add Products

1. Enter the following product characteristics:

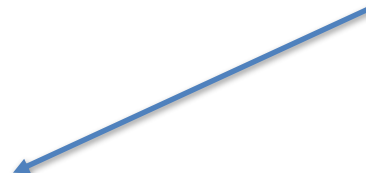
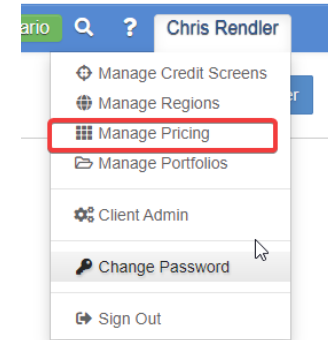
- Name
- Type
- Product Code
 - (only needed if Client Level Margin is being used)
 - If Client Level Margin is used, review resource center document **LoanNEX Client Level Margins**
- Rate Sheet
 - Select Rate sheet created in prior step
- ARM Data
 - only applicable if product is ARM, if Fixed leave blank
- Q Rate Rules
 - only needed if qualifying rate rules should apply
- Floors & Ceilings
 - Add appropriate price/rate floors & ceilings
(NOTE: If Max Price is NOT at the product level, but dependent upon loan characteristics such as prepay structure or state, then those should be configured later on as LLPA's)

The screenshot shows a web application window titled "Product" with a close button (X) in the top right corner. The window has a dark blue header with navigation links: "boration", "Exchange", "Reports", "Guidelines", and "Add Scenario (BETA)". The main content area contains the following fields and sections:

- Product Name:** A text input field with a red asterisk indicating it is required.
- Product Type:** A dropdown menu with a red asterisk indicating it is required.
- Product Code:** A text input field.
- Rate Sheet:** A dropdown menu with a red asterisk indicating it is required.
- Floors & Ceilings:** A grey button to expand this section.
- ARM Data:** A grey button to expand this section.
- Q Rate Rules:** A grey button to expand this section. Below it, there are two dropdown menus separated by a plus sign (+), with the word "AND" centered below them.

Add Adjustments

1. Manage Pricing->LLPAs
2. Add all Adjustments for new Product:
 - For detailed instructions on creating LLPAs, review Resource Center document **Managing Adjustments Guide**



Rate Sheets **LLPAs** Extension Products Margins

Add Eligibility Rules

1. Manage Credit Screens
2. Add all Overlays
3. Add Overlay Groups
4. Attach Overlay Groups to Primary Screens
5. For best practices and a detailed guide, consult document **Managing Eligibility** in the Resource Center

LoanNEX® Pipeline Collaboration Exchange Reports Guidelines

Credit Screen Manager

↑ Add Program Rankings

Primary Overlay Overlay Groups Secondary Softstops Guidelines TPO

+ Add Primary Collapse All

Prime Jumbo

Screen Name	History
Testing - Full Doc	View

Testing?

Chris Rendler

- Manage Credit Screens
- Manage Regions
- Manage Pricing
- Manage Portfolios
- Client Admin
- Change Password
- Sign Out

Versions

Attach PDF Guidelines to Programs

1. Manage Credit Screens-> Guidelines
2. Add Guidelines
 - o PDF preferred
3. Attach to Primary Screens
 - o Select Change in dropdown and add guidelines from step 2

The diagram illustrates the process in three stages:

- Step 1:** A user profile menu for 'Chris Rendler' is shown. The 'Manage Credit Screens' option is highlighted with a red box.
- Step 2:** The 'Manage Credit Screens' page is displayed. The 'Add Program Rankings' dropdown is open, and the 'Guidelines' option is highlighted with a red box. Below it, the '+ Add Guidelines' button is also highlighted with a red box.
- Step 3:** The 'Guidelines' page is shown. The 'Primary' tab is selected. A dropdown menu for 'Prime Jumbo' is open, and the 'Change' option is highlighted with a red box. Below it, the 'View record of bus -test 22' option is also highlighted with a red box.

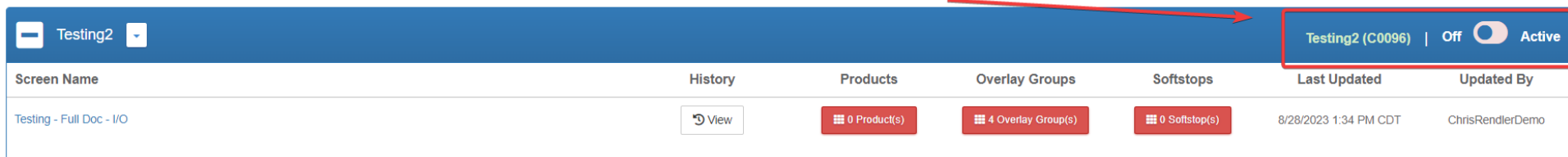
LoanNEX Intervention Needed

Once the above steps are completed, LoanNEX will assist with a few items. Please reach out to investorsupport@loanex.com to help with the following items:

1. Rate Sheet Mapping
2. Adding Program Codes
3. Q&A (if needed)
4. Import Regions (if new regions need to be imported)

Steps after LoanNEX Intervention is Complete

1. Turn on Primary Screens
2. Once LoanNEX completes step 2 from previous slide, you'll need to activate primary screens by toggling this button below:
3. Navigate to Manage Credit Screens->Primary



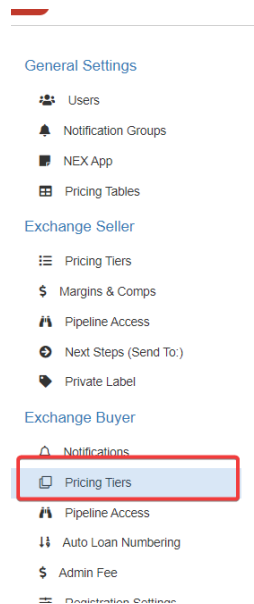
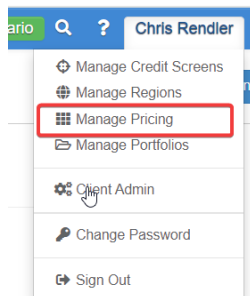
The screenshot shows a software interface with a table of credit screens. The table has columns for Screen Name, History, Products, Overlay Groups, Softstops, Last Updated, and Updated By. The first row is highlighted with a red box, and a red arrow points to a toggle switch labeled 'Off' and 'Active'.

Screen Name	History	Products	Overlay Groups	Softstops	Last Updated	Updated By
Testing - Full Doc - I/O	View	0 Product(s)	4 Overlay Group(s)	0 Softstop(s)	8/28/2023 1:34 PM CDT	ChrisRendlerDemo

Place Programs in appropriate Pricing Tier

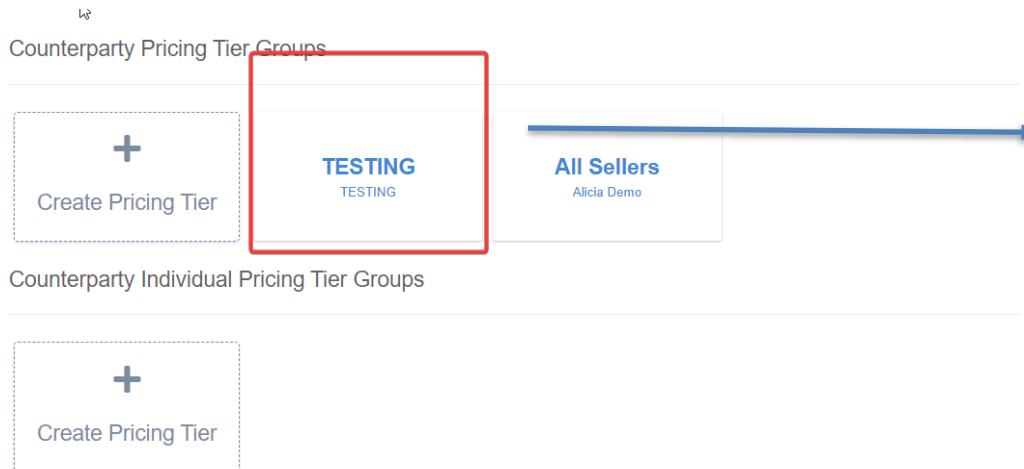
1. The products will now need to be placed in appropriate pricing tiers
2. For testing, products should be placed in the Testing Tier

o Navigate to Client Admin -> Buyside Pricing Tiers



Place Programs in appropriate Pricing Tier (continued)

1. Open up the Testing Tier
2. Move the new product over to **Selected Products**
3. Move your Lender Name over to **Selected Investors**
 - This will expose the new product ONLY to your internal users, not all sellers
4. Done! At this point you should be able to run scenarios to test all aspects of your new product build



The screenshot shows the system interface for product and lender selection. It includes fields for 'TESTING' and 'Description *' with the value 'TESTING'. There is a 'Tags:' section with an 'Add a tag' button. The 'Available Products' section shows a list of products, with 'TESTING GOLD: Full Doc - 5/6 ARM (4/1 ARM 19 Biscayne 30 year (30 Yr. Fixed))' selected. The 'Selected Products' section shows the same product selected. The 'Selected Lock Periods *' section shows options for 15 x, 30 x, 45 x, 60 x, 75 x, and 90 x. The 'Available Lenders' section shows a list of lenders, with 'Chris Rendler' selected. The 'Selected Lenders' section shows 'Chris Rendler' selected.