LoanNEX®

Buyside Roles & Permissions

Summary

LoanNEX has specific User Roles that buyside users can be assigned. A User can be assigned to as many or as few roles as needed. User Roles are the following:

- Client Admin
- Credit Manager
- Exchange Manager

Details on roles are listed below.

Client Admin

Users with Client Admin Access are given access to the following:

- General Settings
- User Management
- Exchange Seller Settings
- Exchange Buyer Settings
- Secondary Setup

Credit Manager

Users with Credit Manager Access are given access to the following:

- Pricing Manager
    - Rate Sheets
    - LLPAs
    - Extension Configuration
    - Products
- Credit Screen Manager
    - Eligibility

Exchange Manager

Users with Exchange Manager Access are given access to the following:

- Exchange Pipeline – Loans on which a lock event has occurred will be visible to users, and they are able to interact with said loans from a buyside perspective
- Users with access to 'Exchange Manager' overrules assigned Pipeline access and gives users access to all loans in the Exchange