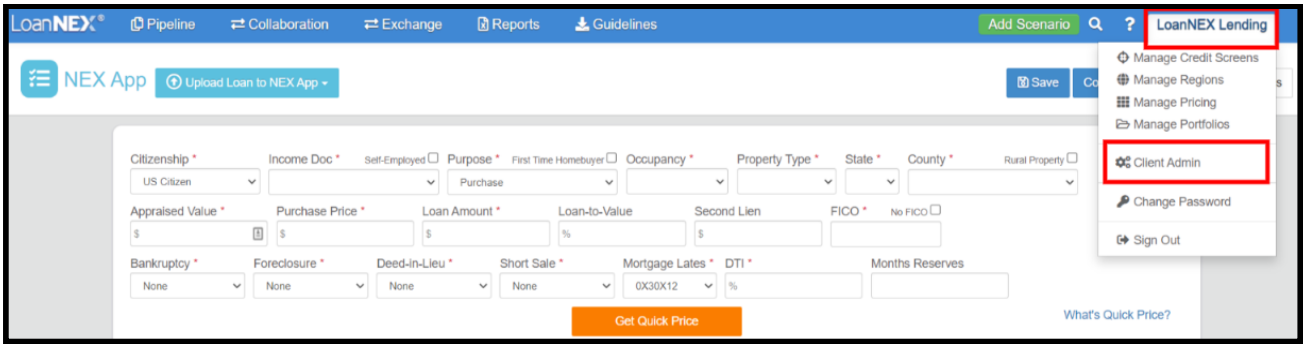
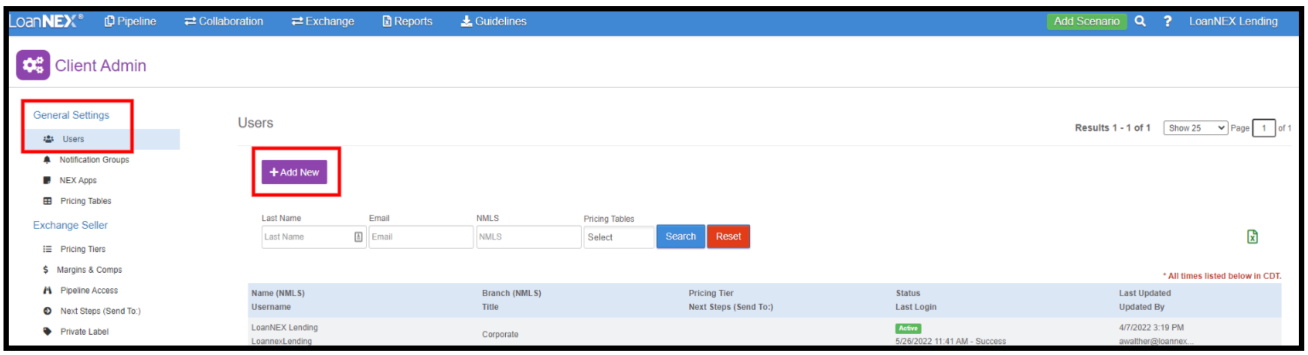
LoanNEX®

USER SETUP GUIDE

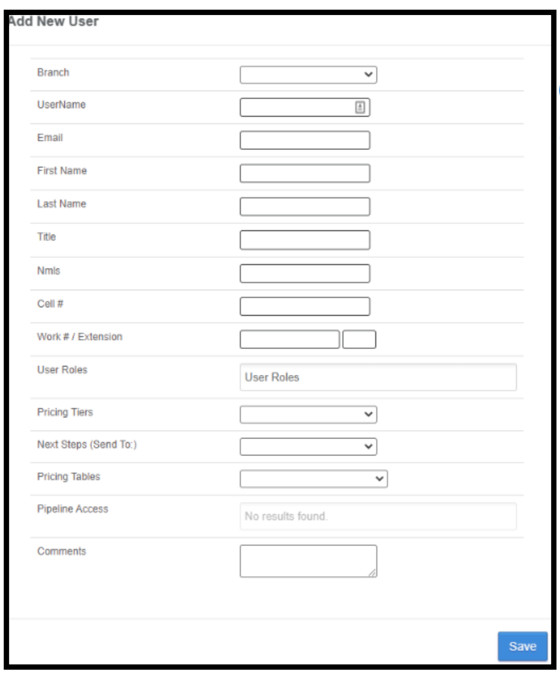
1. LOGIN TO YOUR LOANNEX ACCOUNT AND GO TO THE CLIENT ADMIN SECTION



2. UNDER GENERAL SETTINGS, SELECT USERS, CLICK 'ADD NEW' BUTTON



3. CREATE NEW USER PROFILE



- IF NO BRANCHES ARE LISTED, SELECT 'CORPORATE'
- LOANNEX USES EMAIL ADDRESS; ANY OPTION IS ALLOWED
- ADD FIRST AND LAST NAME
- TITLE, NMLS, CELL #, AND WORK #/ EXTENSION ARE ALL OPTIONAL FIELDS
- USER ROLES— ADD 'CLIENT ADMIN TAG' ONLY IF THE USER WILL BE ADDING ADDITIONAL USERS, OTHERWISE LEAVE BLANK
- PRICING TIERS, NEXT STEPS (SEND TO:), PRICING TABLES, PIPELINE ACCESS LEAVE BLANK
- CLICK 'SAVE' BUTTON

4. ONCE SAVED, AN AUTOGENERATED EMAIL WILL BE SENT TO THE USER, WITH INSTRUCTIONS ON ACTIVATING ACCOUNT