

LoanNEX[®]

USER SETUP GUIDE

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

The screenshot shows the LoanNEX Lending dashboard. The top navigation bar includes 'Pipeline', 'Collaboration', 'Exchange', 'Reports', and 'Guidelines'. A 'LoanNEX Lending' dropdown menu is open, showing options: 'Manage Credit Screens', 'Manage Regions', 'Manage Pricing', 'Manage Portfolios', 'Client Admin' (highlighted with a red box), 'Change Password', and 'Sign Out'. The main content area contains various loan-related form fields such as 'Citizenship', 'Income Doc', 'Purpose', 'Occupancy', 'Property Type', 'State', 'County', 'Appraised Value', 'Purchase Price', 'Loan Amount', 'Loan-to-Value', 'Second Lien', 'FICO', 'Bankruptcy', 'Foreclosure', 'Deed-in-Lieu', 'Short Sale', 'Mortgage Lates', 'DTI', and 'Months Reserves'. A 'Get Quick Price' button is visible at the bottom.

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

The screenshot shows the 'Client Admin' page. The left sidebar has 'General Settings' and 'Users' highlighted with red boxes. The 'Users' section has a '+ Add New' button highlighted with a red box. Below the button is a search form with fields for 'Last Name', 'Email', and 'NMLS', and a 'Pricing Tables' dropdown. A table below shows a list of users with columns: 'Name (NMLS)', 'Branch (NMLS)', 'Pricing Tier', 'Status', and 'Last Updated'. The table contains one entry for 'LoanNEX Lending' with a status of 'Admin'.

3. CREATE NEW USER PROFILE

The 'Add New User' form contains the following fields: 'Branch' (dropdown), 'UserName' (text), 'Email' (text), 'First Name' (text), 'Last Name' (text), 'Title' (text), 'NmIs' (text), 'Cell #' (text), 'Work # / Extension' (text), 'User Roles' (text), 'Pricing Tiers' (dropdown), 'Next Steps (Send To)' (dropdown), 'Pricing Tables' (dropdown), 'Pipeline Access' (text, showing 'No results found.'), and 'Comments' (text area). A 'Save' button is at the bottom right.

- 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