LoanNEX®

NEX APP SETTINGS

Client Admin User Guide

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LoanNEX
support@loannex.com
16 North Central Avenue, Saint Louis, MO 63105

Contents

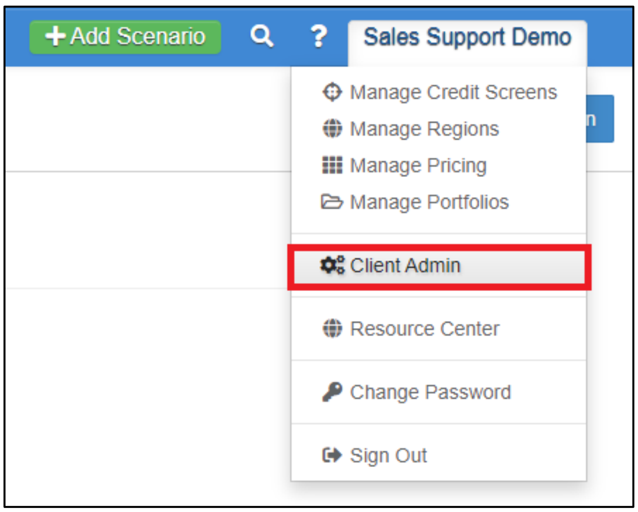
NEX App Overview

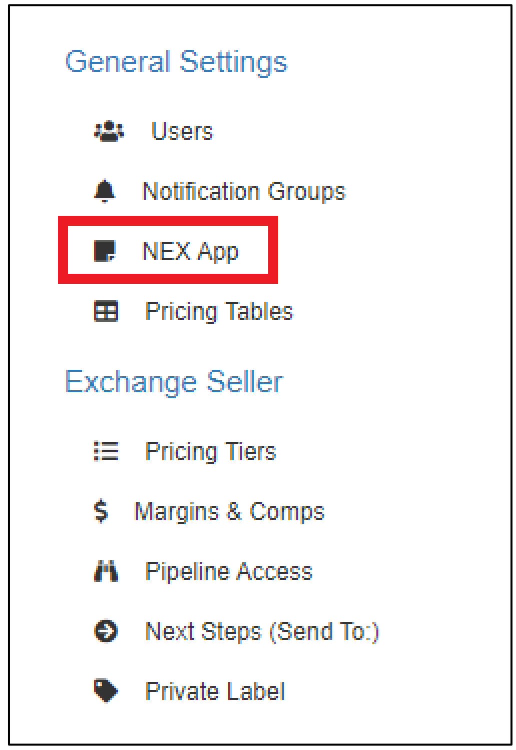
NEX App Settings allow you to customize the dropdown selections available for main loan attributes, apply price filters to control how available programs and pricing will appear to your users, and hide areas (buttons) of the LoanNEX platform.

Important Notes

- Assign NEX App Settings to Users in the Next Steps workflow
- Users with Client Admin profiles can access and create the NEX App Settings section

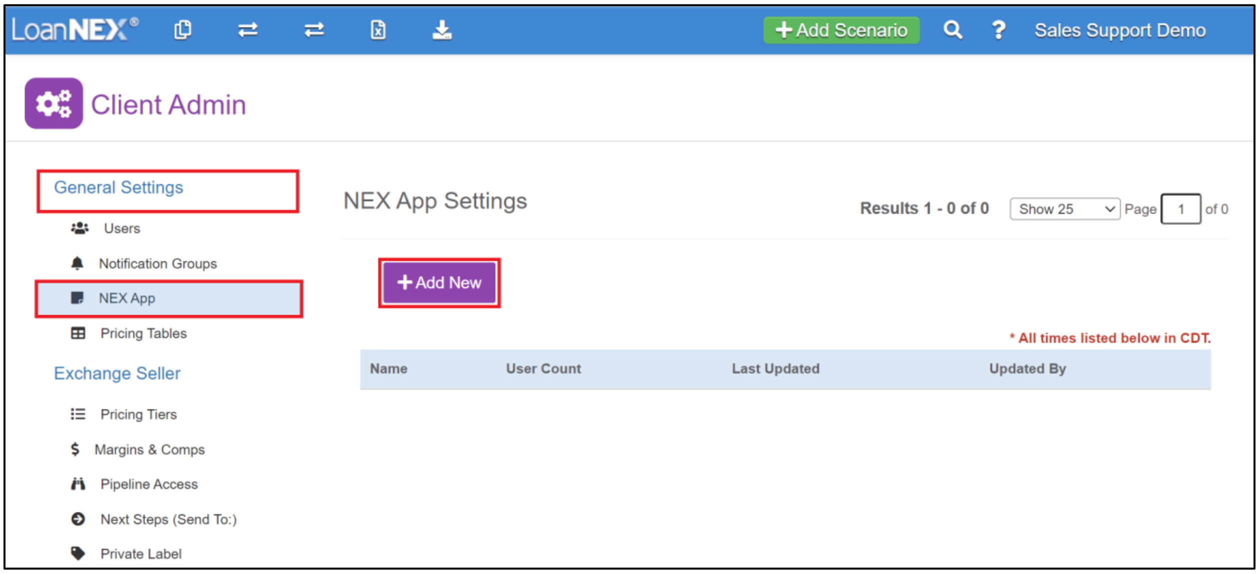
Access NEX App Settings in LoanNEX Client Admin





1. Select your Username in the upper right corner of the screen and select **Client Admin**
2. From the left menu, select **NEX App** under General Settings

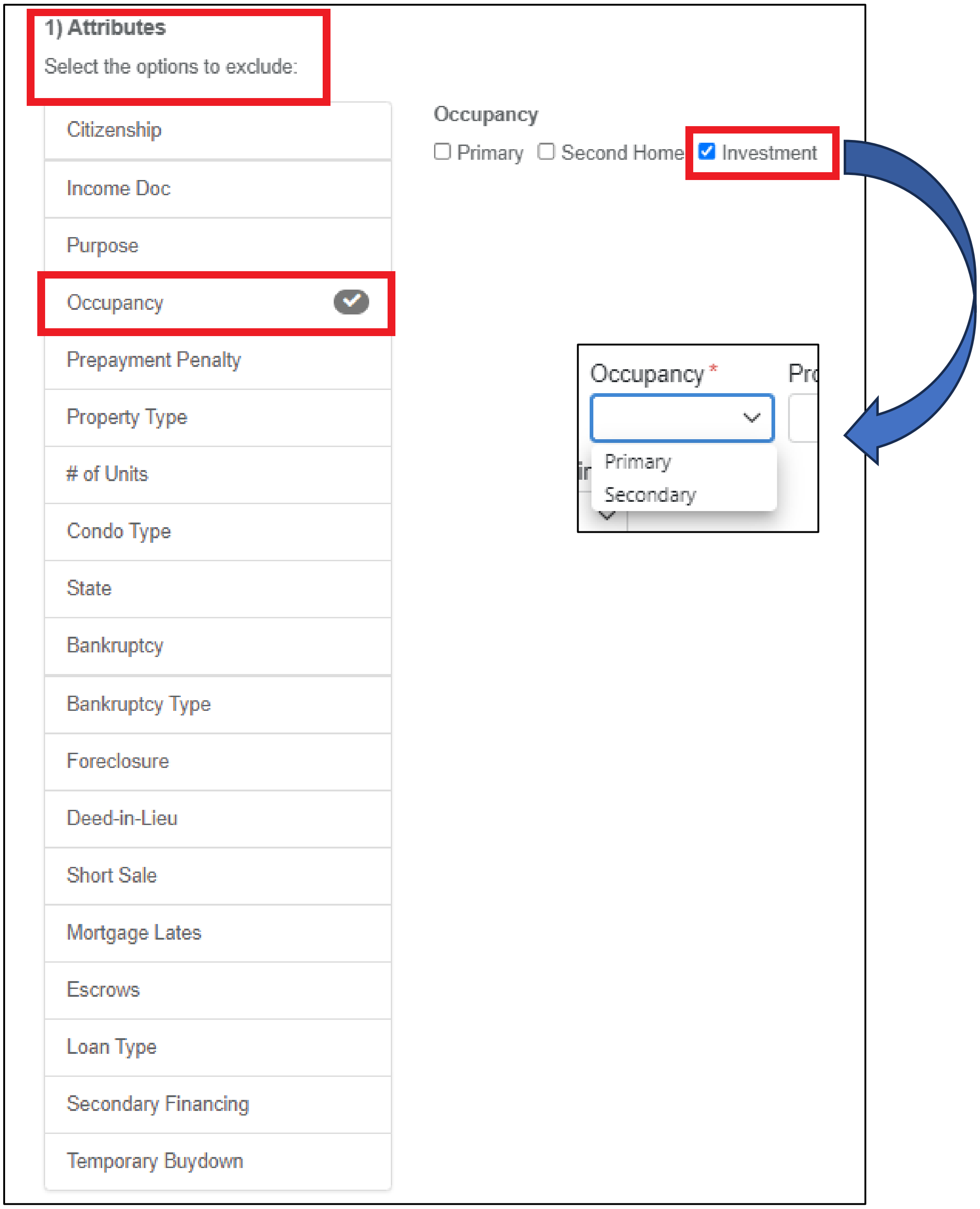
Create a Custom NEX App



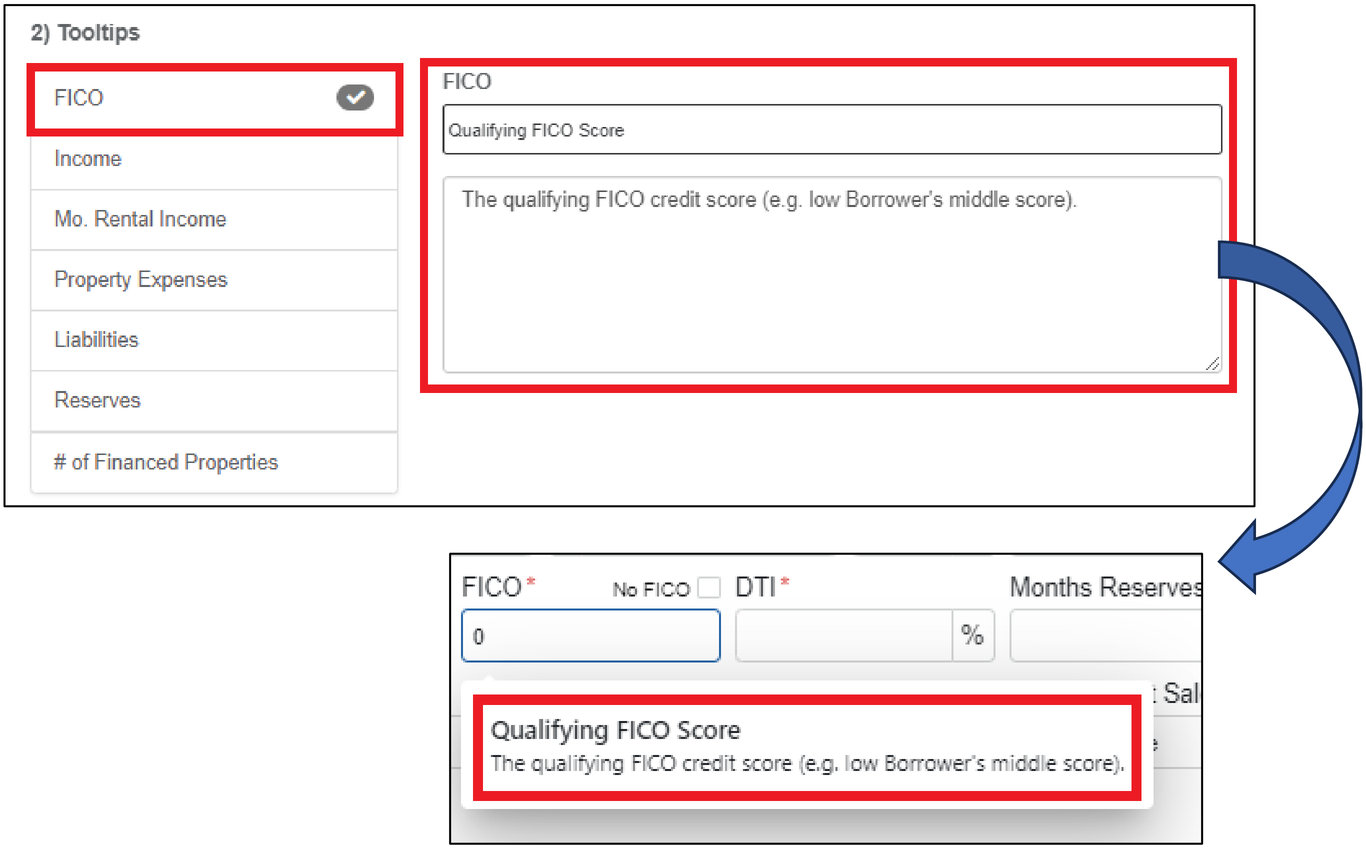
1. Select the **Add New** button
   - All existing NEX Apps will appear on the NEX App Settings page
   - The NEX App Settings page will display the NEX App Name, number of users assigned the NEX App, as well as when the settings were last updated and who made the changes

2. Enter a **Name** and **Description** to help identify the purpose of the NEX App customizations

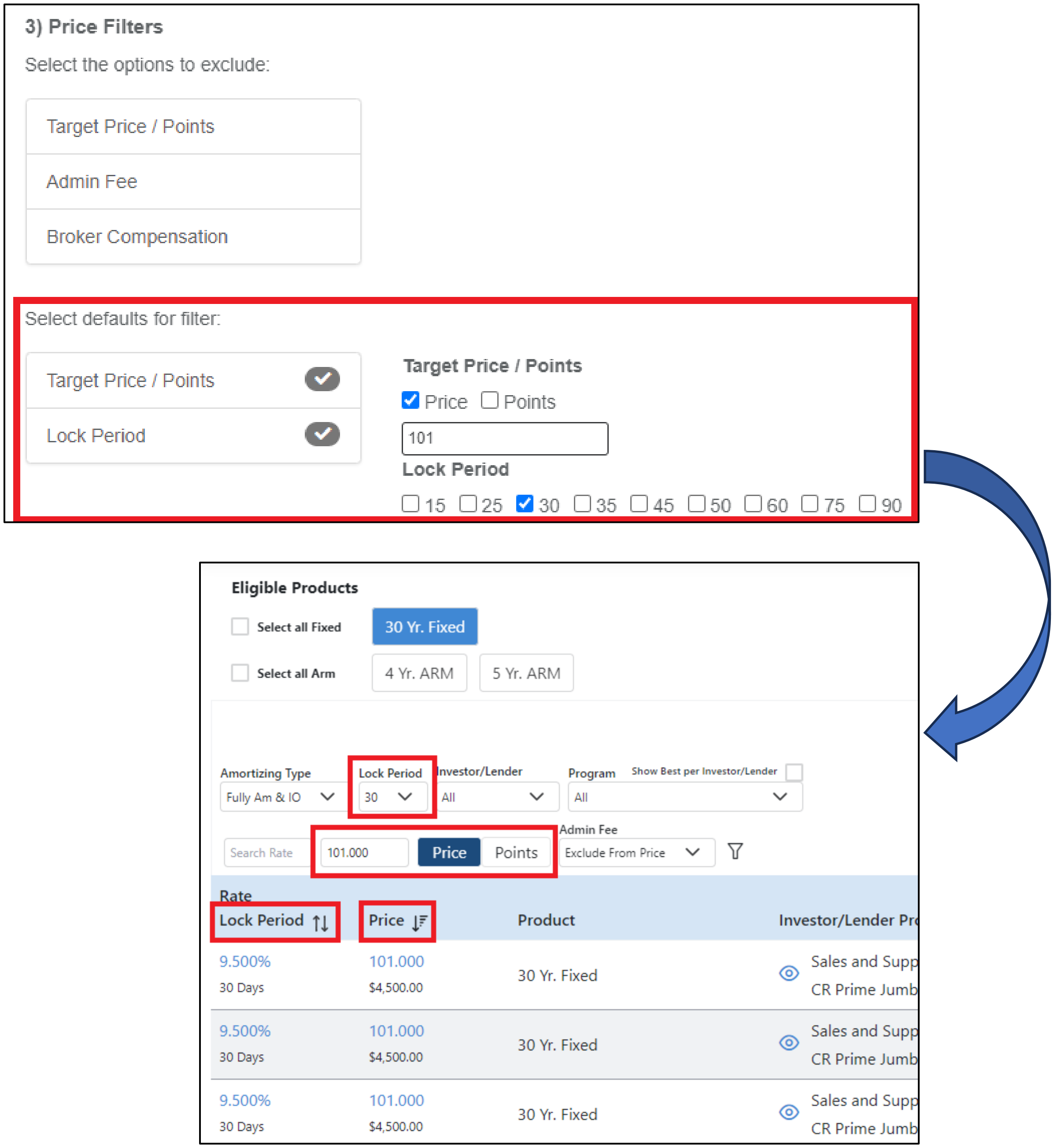
3. Define your NEX App customization(s)



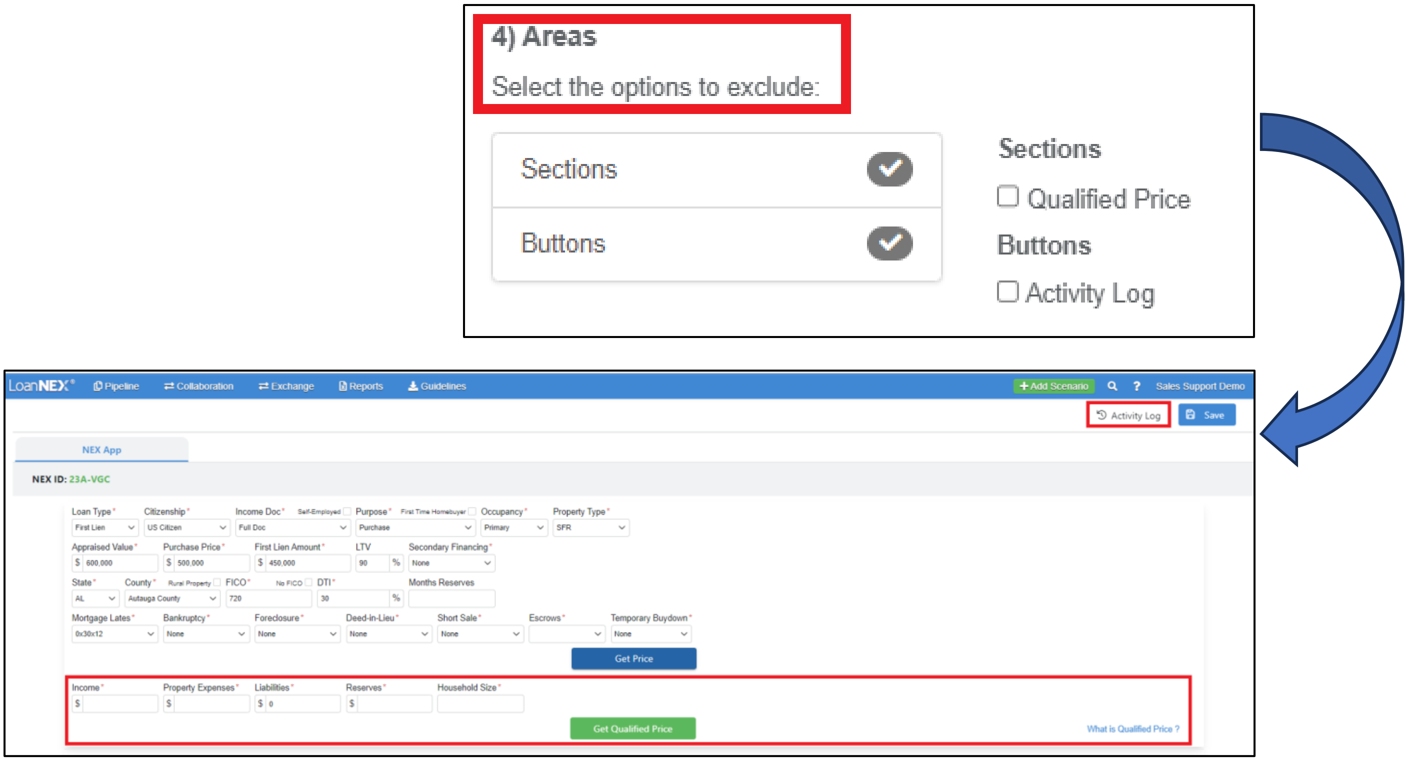
- Attributes (dropdown selections) – Select options to **EXCLUDE** from the NEX App
  - Select the loan attribute on the left
  - Select the checkbox to **exclude** the option on the right
  - *Example: Select Occupancy on the left, and then select the Investment checkbox on the right, to* ***exclude*** *Investment from the dropdown selections on the NEX App*



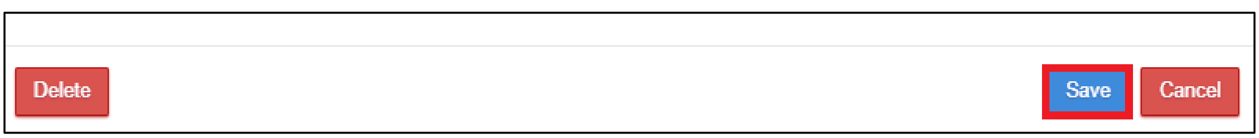
- Tooltips – apply tooltip language to a NEX App field by
    - Select the loan attribute on the left
    - Enter a Tooltip **Header** and **Body**
    - *Example: Select FICO on the left, and then enter the tooltip header and body, to expose on the NEX App*



- Price Filers – exclude options, or apply pre-configured Price, Points, and Lock Period filters to the NEX App Pricing Table
  - Select the filter on the left
    - Select the **Price** or **Points** checkbox, and enter the desired filter
    - Select the **Lock Period** checkbox to **DEFAULT** the Pricing Table to the desired filter
  - *Note: Users still have access to update these filters on the Pricing Table*

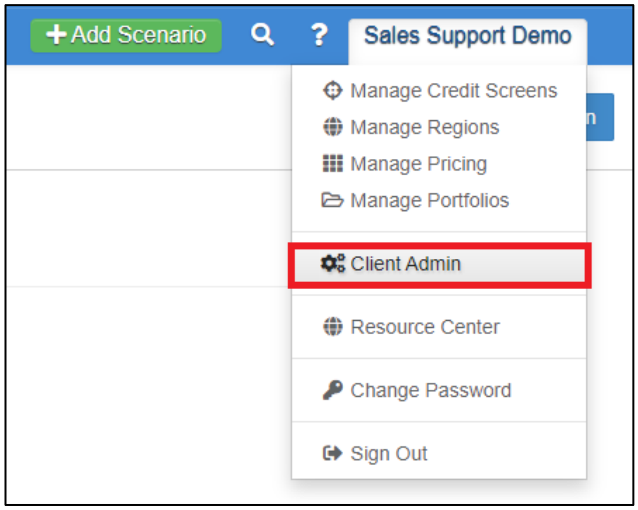


- Areas (NEX App buttons) – Select options to **EXCLUDE** areas from the NEX App (areas are accessible through LoanNEX NEX App buttons)
  - Select **Sections** to expose the option to **EXCLUDE** the **Qualified Price** button and area of the NEX App
  - Select **Buttons** to expose the option to **EXCLUDE** the **Activity Log** button and area of the NEX App

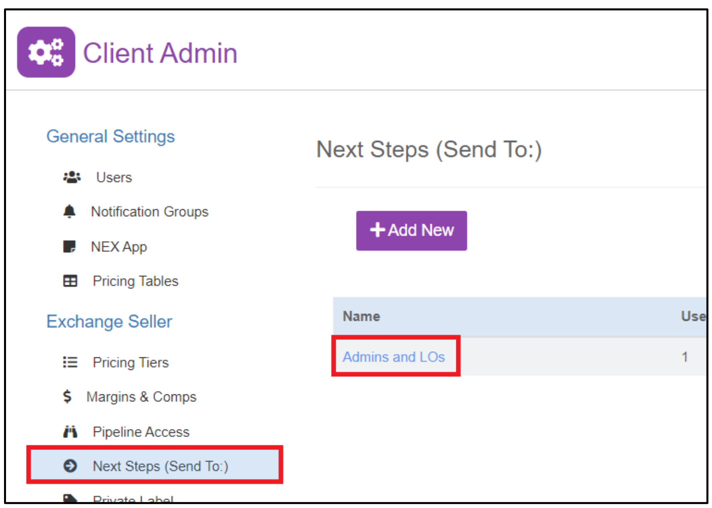


4. Once all NEX App customizations are complete, select the **Save** button
   - Select the **Cancel** button to Cancel the updates
   - Select the **Delete** button, and confirm, to Delete the NEX App Settings

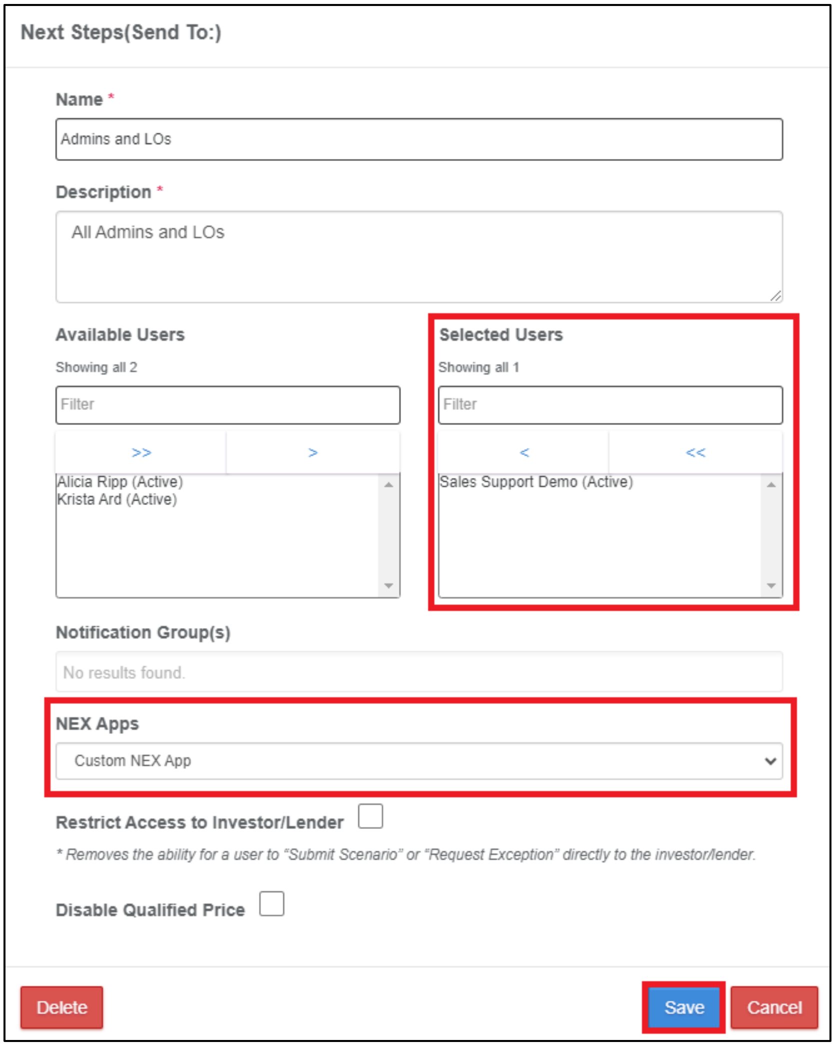
Assign Users to Custom NEX App



1. Select your name in the upper right corner of the screen and select **Client Admin**



2. From the left menu, select **Next Steps (Send To:)** under Exchange Seller
3. Select the appropriate Next Steps link, or select the **Add New** button to create a Next Steps group



4. Select the appropriate NEX App from the **NEX Apps** dropdown
    - The NEX App settings will be applied to the **Selected Users**
    - nam***Note:*** As New Users are added to your organization, they will need to be moved from **Available Users** to **Selected Users** in the appropriate **Next Steps (Send To:)** group to see the custom NEX App
5. Select the **Save** button