
LOANNEX SECONDARY SETUP

Client Admin User Guide

AUGUST 28, 2024

LoanNEX

16 North Central Avenue, Saint Louis, MO 63105



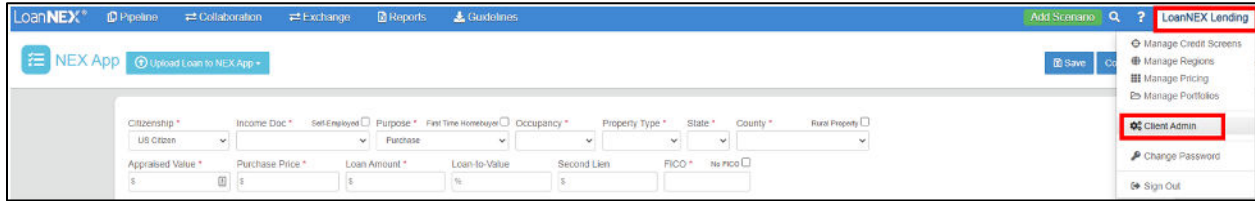
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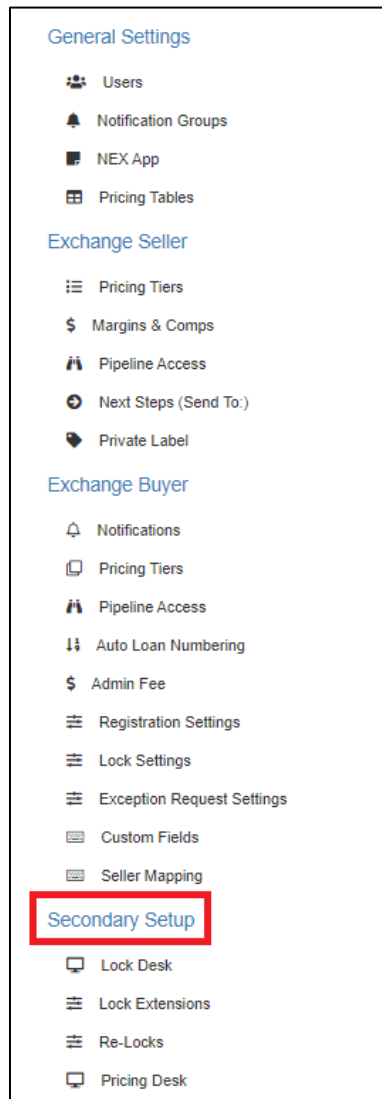


Navigate to Secondary Setup in LoanNEX Client Admin

1. Login to LoanNEX at <https://web.loannex.com/>



2. Click your **Name** in the upper right of the screen
3. Select Client Admin
4. From the left menu bar, find Secondary Setup

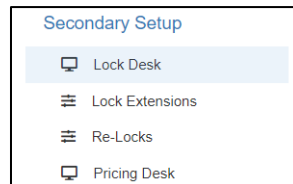





Lock Desk Settings

Manually Open / Close the Lock Desk

1. [Navigate to Secondary Setup in LoanNEX Client Admin](#)



2. From the left toolbar select **Lock Desk**, under **Secondary Setup**

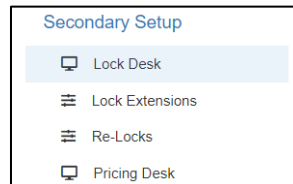
3. Select the **Manually Close Lock Desk** toggle to Open or Close the Lock Desk
 - a. Lock Desk Status is displayed above the toggle button
4. Enter a message to display to the Users when the Lock Desk is Closed in the **Manually Closed Lock Desk Message** textbox
 - a. *LoanNEX Recommendation: The Lock Desk is currently closed. Please contact your Account Executive for additional information regarding our Lock Desk.*
5. Select **Save Changes** button
 - a. Select the Revert Changes  button to undo all updates prior to saving



Lock Desk Hours


Important Note: Excluded Days in the Lock Calendar will override Standard Lock Desk Hours

1. [Navigate to Secondary Setup in LoanNEX Client Admin](#)



2. From the left toolbar select **Lock Desk**, under **Secondary Setup**

A screenshot of the 'Lock Desk' configuration page. The page has a 'Save Changes' button in the top right. The status is 'LOCKED' and 'Manually Closed'. There are two textboxes for messages: 'Manually Closed Lock Desk Message' and 'Lock Desk Hours & Calendar Message'. Below these are tabs for 'Expiration Settings', 'Lock Hours', 'Lock Calendar', and 'Auto Lock'. The 'Lock Hours' tab is selected. Under 'Business Days', Monday through Friday are checked. Under 'Operating Hours', the start time is 08:00 AM and the end time is 06:00 PM, both in (CT) Central Time.

3. Select the **Lock Hours** tab
4. Select checkbox to set **Business Days**
 - a. Check indicates the Lock Desk is open
5. Set **Operating Hours**
 - a. Enter your Start time in the first **Operating Hours** box
 - b. Enter your End time in the second **Operating Hours** box
 - c. Time zone adjusts per User
6. Enter a message to display to the Users when the Lock Desk is Closed in the **Lock Desk Hours & Calendar Message** textbox
 - a. *LoanNEX Recommendation: The Lock Desk is open from [START] AM – [END] PM [TIMEZONE] Monday through Friday. All requests will be processed during these hours.*
7. Select **Save Changes** button
 - a. Select the Revert Changes  button to undo all updates prior to saving



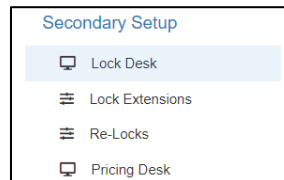
Lock Calendar Settings

Set Holiday Days / Excluded Lock Desk Days

Important Notes:

- Excluded Days in the Lock Calendar will override Standard Lock Desk Hours
- Excluded days, including standard holidays, do not carryover from year-to-year

1. [Navigate to Secondary Setup in LoanNEX Client Admin](#)



2. From the left toolbar select **Lock Desk**, under **Secondary Setup**

The screenshot shows the 'Lock Calendar' tab in the interface. At the top, there are four tabs: 'Expiration Settings', 'Lock Hours', 'Lock Calendar' (active), and 'Auto Lock'. Below the tabs is the 'Excluded Days' section. On the left, there is an 'Add new' button highlighted with a red box. Below it is a table with columns: 'Name', 'Date', 'Observed', and 'Actions'. The first row is empty and highlighted with a red box. The second row is 'Christmas' with date '2023-12-25' and 'Observed' checked. The third row is 'Holiday 3' with date '2023-03-30' and 'Observed' checked. Each row has a 'Remove' button in the 'Actions' column.

Name	Date	Observed	Actions
		<input type="checkbox"/>	Remove
Christmas	2023-12-25	<input checked="" type="checkbox"/>	Remove
Holiday 3	2023-03-30	<input checked="" type="checkbox"/>	Remove

3. Select the **Add New** button

4. Enter the Excluded Day information:

- a. **Name**
- b. **Date** (MM/DD/YYYY)
- c. **Observed** checkbox
 - i. Checked - exclude in Lock Calendar; override the Standard Lock Desk Hours
 - ii. Unchecked - do not exclude in Lock Calendar; Lock Desk will open per Standard Lock Desk Hours

5. Select **Save Changes** button

- a. Select the Revert Changes  button to undo all updates prior to saving

Remove Excluded Days from Lock Calendar List

Note: This action is to delete the holiday from the Excluded Days Lock Calendar list. If you would like to keep the holiday in the Excluded Days list, but not observe the Excluded Day, uncheck the **Observed** checkbox next to the Excluded Day.



Expiration Settings		Lock Hours		Lock Calendar		Auto Lock	
Excluded Days							
<input type="button" value="Add new"/>							
Name	Date	Observed	Actions				
Christmas	2023-12-25	<input checked="" type="checkbox"/>	<input type="button" value="Remove"/>				
Holiday 3	2023-03-30	<input checked="" type="checkbox"/>	<input type="button" value="Remove"/>				

1. Select the Remove button next to the Excluded day you would like to delete

⚠ Delete

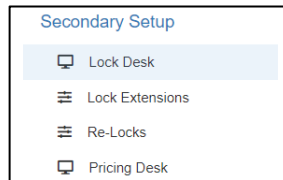
Are you sure you want to delete?

Type DELETE to confirm.

2. Type "Delete" in the textbox to confirm action
3. Select the **Delete** button


Expiration Settings

1. [Navigate to Secondary Setup in LoanNEX Client Admin](#)



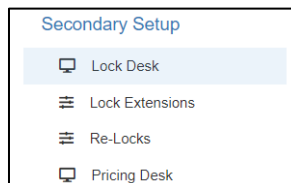
2. From the left toolbar select **Lock Desk**, under **Secondary Setup**



3. Select the **Expiration Settings** tab
4. Select the radio button to choose the **Rate Lock Start** day
 - a. Default option is **Date the rate is locked**
5. Set the **Lock Expiration** time
 - b. Time zone adjusts per User
6. Under **Lock Desk Calendar Date Exclusion**, select to choose if the Lock Expires on the Previous or Next business day
 - c. Default option is **Lock Expires on Next Business Day**
7. Select **Save Changes** button
 - d. Select the Revert Changes  button to undo all updates prior to saving

Auto Lock Settings

1. [Navigate to Secondary Setup in LoanNEX Client Admin](#)



2. From the left toolbar select **Lock Desk**, under **Secondary Setup**



Lock Desk Save Changes ↶

Lock Desk Status **CLOSED**

Manually Close Lock Desk **Manually CLOSED**

Manually Closed Lock Desk Message (character limit 250)

Lock desk is closed.


Lock Desk Hours & Calendar Message (character limit 250)

The Lock Desk is open 8:00 AM – 6:00 PM PST Monday through Friday. All requests will be processed during these hours.

Expiration Settings Lock Hours Lock Calendar **Auto Lock**

Auto Lock

- Enable Auto Lock Approve for Lock Request
- Enable Auto Modification Approve for Modification Request
- Enable Auto Lock Approve for Relock Request
- Enable Auto Extension for Extension Request

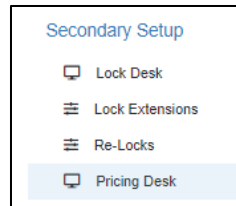
3. Select the **Auto Lock** tab
4. Select the checkbox to enable the following Auto Lock settings:
 - a. **Enable Auto Lock Approve for Lock Request**
 - b. **Enable Auto Modification Approve for Modification Request**
 - c. **Enable Auto Lock Approve for Relock Request**
 - d. **Enable Auto Extension for Extension Request**
5. Select **Save Changes** button
 - e. Select the Revert Changes  button to undo all updates prior to saving




Pricing Desk Settings

Manually Open / Close the Pricing Desk

1. [Navigate to Secondary Setup in LoanNEX Client Admin](#)



2. From the left toolbar select **Pricing Desk**, under **Secondary Setup**

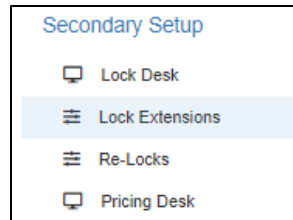
3. Select the **Manually Close Pricing Desk** toggle to Open or Close the Pricing Desk
 - a. Pricing Desk Status is displayed above the toggle button
4. Enter a message to display to the Users when the Pricing Desk is Closed in the **Temporary Pricing Desk Closure Message** textbox
 - b. *LoanNEX Recommendation: The Pricing Desk is currently closed. Please contact your Account Executive for additional information regarding our Pricing Desk.*
5. Select **Save Changes** button
 - c. Select the Revert Changes button  to undo all updates prior to saving



Lock Extensions Settings

Configure Extension Rules

1. [Navigate to Secondary Setup in LoanNEX Client Admin](#)



2. From the left toolbar select **Lock Extensions**, under **Secondary Setup**

Extensions Save Changes ↩

- Extension is subject to Lock Desk hours and Pricing Desk
- Minimum wait period for extension
- Max allowed cumulative extension period
- Max allowed extension
- Client Lock Desk exempt from extension rules

Extension is subject to Lock Desk hours Message (character limit 250)


Minimum wait period for extension Message (character limit 250)

Max allowed cumulative extension period Message (character limit 250)

Max allowed extension Message (character limit 250)

3. Select the checkbox to enable the following Extension settings:
 - a. **Extension is subject to Lock Desk hours and Pricing Desk**
 - b. **Minimum wait period for extension**
 - i. Enter number business **days** in the text box to the right of the setting
 - c. **Max allowed cumulative extension period**
 - i. Enter number of business **days** in the text box to the right of the setting
 - d. **Max allowed extension**
 - i. Enter the **count** in the text box to the right of the setting



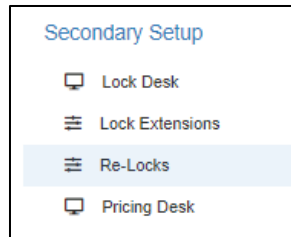
4. Enter display **Message(s)** for the User when:
 - e. **Extension is subject to Lock Desk hours** and the Lock Desk is closed
 - i. *LoanNEX Recommendation: The Lock Desk is currently closed. Extensions can only be processed during open Lock Desk hours. Please contact your Account Executive for additional information regarding our Lock Desk.*
 - f. **Minimum wait period for an extension** has not been met
 - i. *LoanNEX Recommendation: The minimum wait period for Extensions has not been met for this loan. Please contact your Account Executive for additional information regarding our Lock Desk.*
 - g. **Max allowed cumulative extension period** has been reached
 - i. *LoanNEX Recommendation: The maximum Extension period for this loan has been met. Please contact your Account Executive for additional information regarding our Lock Desk.*
 - h. **Max allowed extensions** allocated
 - i. *LoanNEX Recommendation: The maximum number of Extensions for this loan has been met. Please contact your Account Executive for additional information regarding our Lock Desk.*
5. Select **Save Changes** button
 - i. Select the Revert Changes  button to undo all updates prior to saving



Re-lock Settings

Configure Re-lock Rules


1. [Navigate to Secondary Setup in LoanNEX Client Admin](#)



2. From the left toolbar select **Relocks**, under **Secondary Setup**

3. Select the checkbox to enable the following Relock settings:
 - a. **Enable Re-locks for Originators**
 - b. **Limit Re-lock pricing to the original lock term** (example: User can only lock a 30-day price on a 30-day lock period loan)
 - c. **Disable Re-locks when cancellation / expiration exceeds seasoning limit**
 - i. Enter number business **days** in the text box to the right of the setting
 - d. **Utilize worst case pricing for Re-locks**
 - i. Enter number business **days** in the text box to the right of the setting
 - e. **Enable maximum allowed Re-lock count**
 - i. Enter the **count** in the text box to the right of the setting
 - f. **Re-lock pricing adjustment**



- i. Enter the **price** adjustment in the text box to the right of the setting
4. Enter display **Message(s)** for the User when:
 - g. **Re-lock disabled**
 - i. *LoanNEX Recommendation: Re-locks are unavailable for this loan. Please contact your Account Executive for additional information regarding our Lock Desk.*
 - h. **Maximum allowed Re-lock Message**
 - i. *LoanNEX Recommendation: The maximum number of Re-locks for this loan has been met. Please contact your Account Executive for additional information regarding our Lock Desk.*
5. Select **Save Changes** button
 - i. Select the Revert Changes  button to undo all updates prior to saving