

LOANNEX ENCOMPASS INTEGRATION

Integration Setup Guide

SmartClient - LO Connect - TPO Connect

JANUARY 1, 2025 LoanNEX 16 North Central Avenue, Saint Louis, MO 63105



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LoanNEX Support Information

Support Case Submission Process

- 1. Select the appropriate email address below:
 - a. Client Support / Configuration Settings: support@loannex.com
 - b. Eligibility & Pricing Inquiries: <u>investorsupport@loannex.com</u>
- 2. Include Contact Information:
 - a. First and Last Name
 - b. Company Name
 - c. Email
 - d. Telephone
- 3. Include a detailed description of your Case
- 4. A Case will be created, and the appropriate LoanNEX Team member notified
- 5. LoanNEX will respond within one business day to address your Case

LoanNEX Mortgage Integrations Technology Setup Support

- Integration Team Email: <u>integrations@loannex.com</u>
 - Integration Support
 - Mortgage Technology Setup Steps during the LoanNEX Mortgage Technology Setup, there are steps outlined which will require information be sent to the Integrations email address, as outlined below:
 - Developer Connect Integration during the Developer Connect Integration, the initial Client details will need to be sent to the Integrations email address
 - API User Details after the LoanNEX API User setup is complete, the User details will need to be sent to the Integrations email address

Sales and General Inquiries Contact Information

- Main Phone: (314) 833-6464
- Sales Email: <u>sales@loannex.com</u>
 - Product demonstrations
 - Additional service requests
- General Inquiries Email: <u>info@loannex.com</u>
- Billing Inquiries Email: support@loannex.com



Integration Setup

Encompass Developer Connect Integration TPOC

Integration Request / Approval

- 1. Email <u>integrations@loannex.com</u> and provide the following information to initiate the Developer Connect Integration Request:
 - a. Organization Name
 - b. Encompass Client ID
 - c. Encompass Testing (TEBE) Instance ID
 - d. Encompass Production (BE) Instance ID
 - e. Primary Contact First Name
 - f. Primary Contact Last Name
 - g. Primary Contact Title
 - h. Primary Contact Phone
 - i. Primary Contact Work Email
- 2. LoanNEX submits Developer Connect Integration Provision Request to ICE Mortgage Technology
 - a. LoanNEX will contact Encompass Developer Connect on your behalf and request LoanNEX be provisioned through Developer Connect to your Encompass environment
- 3. ICE approves Integration Provision Request
 - a. Approvals are generally done overnight on Friday evenings

Create LoanNEX API User in Encompass

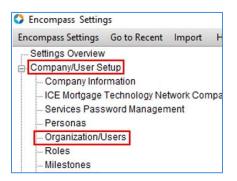
Important Notes

- LoanNEX API User must have access to loan folders for TPOC
- LoanNEX API User's Persona must have External Settings for Company Detail enabled
- Before creating the LoanNEX API User, ensure you have created a Persona and Group Membership / User Group that will allow appropriate access to the LoanNEX API User
 - Encompass Recommendation: The best practice is to create a unique Persona and User Group by duplicating the existing Loan Officer Persona and User Group. Go to the Persona, or User Group, section in Encompass Settings under Company/User Setup. Right click on the Persona or User Group and select Duplicate. You can then edit the permissions as needed.
- If your organization restricts IP Addresses, please provide the following LoanNEX IP
 Address for the Encompass User API call to your System Administrator: 52.173.75.106
- Encompass "Add A User" Support Documentation <u>Access Here¹</u>

¹ https://help.elliemae.com/documentation/encompass/Content/encompass/settings/Add_a_User.htm



- 1. LoanNEX Provides OAuth Client ID needed for Encompass API User
- 2. Login to Encompass SmartClient
- 3. Select **Settings** from the Encompass drop-down on the top menu bar; the Encompass Settings window will open in a new window



4. Under Company/User Setup, go to Organization/Users

Organization/Users	
Create and maintain a hierarchy of your organization and user accounts.	
Organization	🕼 🗹 🗙
Administration Strach A Borneh A Borneh B Strach B Z-Disabled Users Z-Test Users	
Enabled Users (21) User Licenses (40)	

- 5. Select the appropriate Organization hierarchy to add the LoanNEX API User
 - a. Select a hierarchy high enough in the organization that it provides the appropriate access to loans for the integration
 - b. LoanNEX Recommendation: Select a hierarchy just below the Administration hierarchy, or a hierarchy for service accounts
- 6. Click the icon to Create New User under the appropriate Organization hierarchy



Account Inform	nation] Disable Login 📋 Disable Acc	count	Public Profile	* Personas		Vew/Edit Rights
User ID		loannexapi	xapi 🗹 i		TPO - LoanNEX		
API Client ID		[OauthClientId]					
First Name		LoanNEX					
Middle Name							
Last Name		API			Course Manufacture his		View Rights
Suffix					Group Membership All Users		New rugha
Job Title					Autosets		
Employee ID N	umber						
Phone Number							
Cell Phone Nur	mber						
Fax Number							
Enal	3	integrations@loannex.com			Comments		
CHUM							
Working Folde		<adverse loans=""></adverse>	~				
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NMLS Expiratio	on Date		~				
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				Edit Subo	ordinates' Loans		
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Name				Plan Name		Start Da	t 🔻 End Date
Start Date							
Min Term # Days	1						
% Amount							
5 Amount							
and the second se							
Minimum S							
Maximum S Maximum S							Use Parent Info
	nect Site						

- 7. Enter User Details:
 - a. User ID: loannexapi
 - b. API Client ID: Oauth Client ID provided by LoanNEX
 - c. Select API User checkbox
 - d. First Name: LoanNEX
 - e. Last Name: API
 - f. Email: integrations@loannex.com
 - g. Working Folder: select appropriate folder that houses TPOC loans
 - h. Personas:
 - i. Assign the API User to a Persona
 - ii. Persona must include:
 - 1. Forms / Tools



- a. TPO Information²
- b. Lock Request Form
- c. LO Comp Tool
- 2. External Settings³
- 3. TPO Connect
- iii. Encompass Recommendation: The best practice is to create a unique Persona by duplicating the existing Loan Officer Persona. Go to the Persona section in Encompass Settings under Company/User Setup. Right click on the Loan Officer Persona and select Duplicate. You can then edit the Persona permissions as needed.
- iv. LoanNEX will authenticate the API User credentials to ensure the Persona has the necessary settings / access for Integration

i. Group Membership:

- i. Assign the API User to a Group Membership
 - 1. You may assign one or more User Groups to the API User account to provide appropriate access to loan folders and other resources
- ii. Encompass Recommendation: The best practice is to create a unique User Group by duplicating the existing Loan Officer User Group. Go to the User Group section in Encompass Settings under Company/User Setup. Right click on the Loan Officer User Group and select Duplicate. You can then edit the User Group permissions as needed.
- iii. LoanNEX will authenticate the API User credentials to ensure the User Group has the necessary settings / access for Integration

j. Access to Subordinates' Loans:

- i. Select Access to all loans in the same level checkbox
- ii. Select Edit radio button
- iii. Select Edit Subordinates' Loans
- 8. Click Save button

Enable Integration

- 1. Email <u>integrations@loannex.com</u> and provide the LoanNEX API User details:
 - a. Encompass Instance ID
 - b. TPOC URL
 - c. LoanNEX API User Credentials (Username and Password)
- 2. LoanNEX enables integration and authenticates the LoanNEX API User
- 3. LoanNEX will confirm with the Primary Contact that the API User was setup correctly and the Integration is enabled

² Ensure Custom Fields Tab are selected

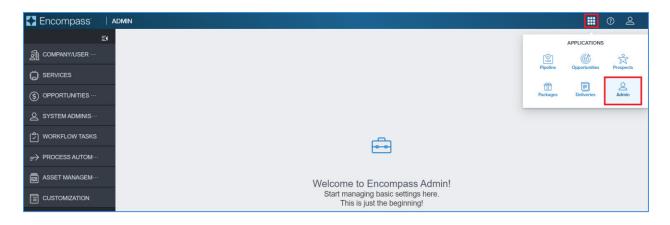
³ Create Organizations, Delete Organizations, Create/Edit Banks, and Delete Banks are not required



Ellie Mae Partner Connect (EPC) Integration and User Setup

Add LO Connect Provider / Enable Integration

1. Login to Encompass LO Connect (encompassloconnect.com/admin)



2. Navigate to the Admin section from the main screen

	ADMIN	
	Services Management 1 Services Configured	Automation Rules Add Service LoanNEX Qualifier - Product *
COMPANY/USER ···		Sort ~ AZ Category ~ All
Services Management Data Permissions	LoanNEX Qualifier - Product and Pricing Service Product and Pricing	
	Service Setups Credentials	
	Field Mapping Doc Mapping	

- 3. Select Services Management on the left menu bar
- 4. Select Add Service button
 - a. Search for: LoanNEX Qualifier Product and Pricing Service
- 5. Select Service Setups

Encompass	4	ADMIN					0	2
	≣(Services Management /						
COMPANY/USER ···		LoanNEX Qualifier - Product and P	ricing Service Service Setups			0	Credent	tials
		Manual					Add	1
Services Management		STATUS SERVICE SETUP NAME	READINESS CONDITION	MODIFIED BY	MODIFIED DATE			4
Data Permissions		LoanNEX Qualifier		andrewwalther	01/19/2024	~		
S OPPORTUNITIES								

6. Select Add button

Encompass	Services Management / Service Setups /						_
COMPANY/USER ···	Edit Manual Setup				Act	ive 🧿	N (
SERVICES	Service Type Product and Pricing	Evaluation Level Loan Level	Provid	ler IEX Qualifier - Product and Pricing Service			
Services Management							
Data Permissions	Service Setup Name		Service Setup Description				
S OPPORTUNITIES ···	Loannex Qualitier						
	Readiness Conditions 0					Valida	te
🗇 WORKFLOW TASKS	Condition Editor Query Builder						
₽ PROCESS AUTOM····							
	Authorized Users*			Add	Dele	te	1
	ai	NAME	TYPE	ACTION	•		
	0	Administration	Organization	Î			

- 7. Edit Service Setup Name for the Product and Pricing Service
- 8. Select the **Add** button to update Authorized Users:

Encompass 🛛 🗛	DMIN					Ⅲ ② ≗
Ð	Services Management / Service Setups /					
COMPANY/USER ···	Add Manual Setup					Active
🖨 SERVICES 🔶	Service Type Product and Pricing	Add Entities			×	
Services Management		Category		Q Selected Users		
Data Permissions	Service Setup Name	Drganizations	ъ.			
S OPPORTUNITIES ···		요 Users	7			J
	Readiness Conditions	원 Personas	2			Validate
C WORKFLOW TASKS	Condition Editor Query				No Items Selected	
ASSET MANAGEM····						
	Authorized Users*				0/200	Add Delete
	0				Cancel Add	
						Cancel

- i. Select Organizations, Users and/or Personas that are allowed to access LoanNEX
- ii. Click the **Add** button
- iii. Repeat until Authorized Users complete
- b. Select the **Save** button

Encompass 🛛	DMIN	태 0 원
E COMPANY/USER ···	Services Management 1 Services Configured	Automation Rules Add Service LoanNEX Gualifier - Product ×
		Sort V AZ Category V All
Services Management	LoanNEX Qualifier - Product and Pricing Service Product and Pricing	
S OPPORTUNITIES ····		
	Service Setups Credentials Field Mapping Doc Mapping	
🗇 WORKFLOW TASKS		

- 9. The new Provider, LoanNEX Qualifier Product and Pricing Service, displays as a card on the Services Management page
 - a. Select Service Setups

Encompass	14	DMIN					0	2
	Ξ٩	Services Management /						
COMPANY/USER ···		LoanNEX Qualifier - Product and P	ricing Service Service Setups			C	Credent	ials.
		Manual				Ĩ	Add	
Services Management		STATUS SERVICE SETUP NAME	READINESS CONDITION	MODIFIED BY	MODIFIED DATE			
Data Permissions		LoanNEX Qualifier		andrewwalther	01/05/2024	~		1
S OPPORTUNITIES ···								

b. Select the **Status** radio button to turn "On" the integration

Create Encompass / LoanNEX Users

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

Loan NEX	Pipeline	4	Guidelines						Add Sc		٩	?	LoanNEX Lending
										_			😂 Manage Portfolios
E NEX	App 💿 Upi	and Los	in to NEX App +						CD Se	ve (Contact		Client Admin
												T	P Change Password
	Citizenship *		Income Doc *	Self-Employed	Purpose *	First Time Homebuyer	Occupancy*		Property Type *	State	1		
	US Citizen	~		~	Purchase	~		~	~		~		(Sign Out

- 2. Click your Company Name in the upper right of the screen
- 3. Select Client Admin

an NEX* @ Pipeline	: 🛓 Guidelines					Add Scena	rio Q ?	LoanNEX Le
Client Admin								
General Settings	13							14
de Users	Users					Results 1	-1 of 1 Show	v 25
Notification Groups	Minescon a stati							
NEX Apps	+ Add New							
Pricing Tables								
Exchange Seller	Lest Namo	Email	NMLS	Pricing Tiers	Next Steps (Ser	nd Tor) Pricing Tables	Pipeline Acces	
	Lasz Norma	Email	NM,S	Select	Select	Select	Select	Search
III Pricing Tiers.								-
\$ Margins.	Reset							

- 4. The Client Admin section of LoanNEX will open to the Users page
- 5. Select the excel icon to export your Company's User list
- 6. The User list export will show a UserGUID (Column AL) for each Usera. You will need this UserGUID to create the Encompass User in the following steps
- 7. Login to Encompass LO Connect at <u>https://encompassloconnect.com/login</u> and navigate to the **Admin** section

	ADMIN	Ⅲ ① ≗
COMPANY/USER ···	Services Management 1 Services Configured	Automation Rules Add Service LoanNEX Qualifier - Product ×
		Sort ~ A-Z Category ~ A
Services Management	LoanNEX Qualifier - Product and Pricing Service	
Data Permissions	Product and Pricing	
S OPPORTUNITIES ···	Service Setups Credentials Field Mapping Doc Mapping	
WORKFLOW TASKS		

- 8. Select Services Management
- 9. Find LoanNEX Qualifier Product and Pricing Service and select Credentials

Encompass	ADMIN						0	2
Ξ١	Services Management /							
COMPANY/USER ···	LoanNEX Quali	fier - Product and F	Pricing Service Crede	entials				
	User Credentials						Г	Add
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Data Permissions	Andrew Walther	INDIVIDUAL	andrewwalther	12/16/2021	andrewwalther	03/03/2022		:
S OPPORTUNITIES ···	LoanNEX - FEHIM	INDIVIDUAL	akundalic	11/12/2021	fdervisbegovic	12/14/2021		1
Q SYSTEM ADMINIS		INDIVIDUAL	akundalic	12/14/2021	akundalic	02/10/2022		

10. Select the Add button



🛃 Encompass 🛛 🗎 🗚	DMIN	성의단 기법 영국 관람은 가격을 생각해.			0	2
≣(Services Management / Credentials /					
COMPANY/USER ···	Add User Credentials					
	Name •	Description				
Services Management						
Data Permissions	Credentials					
S OPPORTUNITIES ···	UserGUID •	Correspondent UserGUID	Wholesale UserGUID			_
	Users•			Add D	elete] rða
🖒 WORKFLOW TASKS						
	D NAME	ТҮРЕ	ACTION			
ASSET MANAGEM		No Results Found.				
	Total items: 0					
				Cancel	S	ave

- 11. Enter User Credential information
 - a. Enter the User's Name
 - b. Enter UserGUID
 - i. If User has access to <u>one</u> LoanNEX Account. enter the LoanNEX UserGUID in the first UserGUID field
 - 1. If the one account the User has access to is either Correspondent or Wholesale, also enter the same UserGUID in the appropriate field (either Correspondent UserGUID or Wholesale UserGUID)
 - ii. If the User has access to more than one LoanNEX Account, by channel:
 - 1. Lock Desk with Retail Access enter the Retail UserGUID in the default UserGUID field
 - Correspondent or Wholesale User enter either the Correspondent or Wholesale UserGUID into the default UserGUID field
 - c. Enter Correspondent UserGUID if applicable
 - i. Enter LoanNEX UserGUID associated with the Correspondent LoanNEX Account, even if the Correspondent UserGUID was utilized in *default* field
 - ii. If User should not have access to a Correspondent LoanNEX Account in Encompass, leave blank
 - d. Enter Wholesale UserGUID if applicable
 - i. Enter LoanNEX UserGUID associated with the Wholesale LoanNEX Account, even if the Wholesale UserGUID was utilized in *default* field
 - ii. If User should not have access to a Wholesale LoanNEX Account in Encompass, leave blank
 - e. Select **User** from list
- 12. Click the **Save** button
- 13. Repeat steps 13 and 14 above until all Users have been added



Configuration Settings

TPO Connect Settings

Important Notes

WELCOME PIPELINE ADD NEW LOAN	SCENARIOS LOANNEX SCENARIOS ~ DOCUMENTS		
1000		Loan F: Loan Type: Conventional Interest Rate: 3.379% Sated Total Loan Am., \$273,750.00 Loan Purpose: Purchase LTV/Comb Lo., 75.00% /75.00% White tot Sated	3 2
	\$273,750.00	Started Key Dates	-
PRODUCT PRICING & LOCK DOCUMENTS	Base Loan Amount MI, FF, MIP Financed \$273,750.00 \$0.00	Begittered Conditions LE Sent -	
I CONDITIONS	Sub: Finencing \$0.00	Open 0 Revised ESent - Shou-Details CD Sent -	
LOAN ACTIONS	and Management 1998	AUS Revised CD Sent - Onder DU Order LPA AUS Ordered - Down Payment P & I Down Payment P & I Down Payment Submits UW -	
Import Additional Data Order Credit Order DU	Amortization Type Amortization Term Fixed Rate 360	\$91,250 \$1,210.24 Submit to UW - Reserves 071 Estimated Closing - \$32,659.85 110.595%/126.134% UW Suspended -	
Order LPA Disclosures	Loan Program	Credit Information UW Oper to Close -	
Submit Loan Re-Submit Loan Change of Circumstance	The optimum in second	Order Credit Funds Released - Barman Experient Translation Explane	
Withdraw Loan LoanNex PPE	Primary 1 unit Estimated Value Appraised Value		
	\$365,000 Furchese Frice \$365,000		

- If you are not utilizing the TPO Connect portal with your LoanNEX Integration, can skip this section
- There are two ways to enable the LoanNEX Products and Pricing Service in TPOC:
 - Loan Summary Products Pricing & Lock (Option 1)
 - Loan Actions External Page (Option 2)

Loan Summary: Products Pricing & Lock (Option 1)

- 1. LoanNEX will provide the URL (Product & Pricing External Link) needed to expose the LoanNEX Product & Pricing Service in your Encompass TPOC Connect
- 2. Login to Encompass Admin portal
- 3. Select the Home tab
- 4. Select the **TPO Web Center Administration** link from the menu on the right side of the screen
- 5. The **Encompass TPO Connect Administrator** site will launch in a new window, which lists all the TPO Connect Websites for your Company
- 6. Find the appropriate Encompass TPO Connect Website
- 7. Select the Edit link for that URL



Integrations	The 10 to 10 to 10	
Theme	Third Party Integration Options	
Company Information	Enable Desktop Underwriting (DU)	Enable Loan Product Advisor (LPA)
Pages & Links	Inable Desktop Originator Casefile ID Infort for Wholesale	I sell loans to Freddie Mac
Assets	Enable Desktop Originator Casefile ID Import for Correspondent Non- Delegate	
Domains	DU Lender Index flori ID	
URLA 2020	DU User Name	
Additional Settings	DU Password	
Fee Management		
Reporting Views		
Old Reporting Views		None
Batch Document Upload		
Pipeline View	Product & Pricing Service	
Notifications	Enable Product & Pricing Standard Integration None	Enable Product & Pricing External Link
Custom Condition Statuses		. magne.ir
Contact Settings TPO Administration_PROD_20200710		

- a. Select the Integrations tab from the menu on the left side of the screen
 - i. Find Product & Pricing Service
 - 1. Select Enable Product & Pricing External Link radio button
 - 2. Enter **URL** provided by LoanNEX

Loan Actions: External Page (Option 2)

Best Practices

- Do not duplicate the same products in each platform
- Utilize LoanNEX for Non-Agency specific products so that you have the broadest parameters to deliver accurate pricing and eligibility
- By having specific products built in each PPE, your internal team will be able to quickly know which engine to use when validating and confirming pricing
- Remember, all activity is recorded in LoanNEX for both the client and your team. This record will allow you to always know what occurred, when and with what information
- 1. LoanNEX will provide the URL needed to expose the LoanNEX Product & Pricing Service in your Encompass TPOC Connect
- 2. Login to Encompass Admin portal
- 3. Select the Home tab
- 4. Select the **TPO Web Center Administration** link from the menu on the right side of the screen
- 5. The **Encompass TPO Connect Administrator** site will launch in a new window, which lists all the TPO Connect Websites for your Company
- 6. Find the appropriate Encompass TPO Connect Website
- 7. Select the **Edit** link for that URL

rations le pany Information	Pages & Links Manage the content of your TPO Connect pages and configure links that You can also create new custom pages	Add External Page Link * Page Name * URL * Render Type Loan Navigation Lin	k - Full Page 💌			
s & Links	Dashboard Widgets Pages Navigation Mod		Cancel Create			
s	External Page Settings					Add External
ins	Page Name	Туре		Visibility		
2020	LosnNex Scenarios	Main Nevigation Link - Full Page	Logged in Only	Show	Edit Del	tte
ional Settings	LosnNex PDE	Losn Nevigation Link - Full Page	E Logged in Only	Show	Edit Del	ite
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- a. Select the **Pages and Links** tab from the menu on the left side of the screen
- b. Select the Add External Page button
 - i. Enter a Page Name
 - ii. Enter **URL** provided by LoanNEX
 - iii. Render Type: Loan Navigation Link Full Page
 - iv. Click the **Create** button

Page Name	Туре		Visibility	
LoanNex Scenarios	Main Navigation Link - Full Page	Logged in Only	Show	Edit Delete

- 8. Select the **Logged in Only** checkbox
- 9. Select the **Show / Visibility** checkbox



Encompass SmartClient Settings

Rate Sheets and Pricing Tiers

Important Notes

- If you do not have multiple Rate Sheets, you can skip this section
- New Pricing Tiers must be communicated to LoanNEX at <u>support@loannex.com</u> to associate in our system (Pricing Tier Tags)
- Custom field options cannot be duplicated (i.e., you cannot have a "Tier A" option in more than one Rate Sheet / Pricing Tier)

ncompass Settings Go to Recent	import Help							
Settings Overview Company/User Setup	TPO Custom Fields							
External Company Setup	Create plobal custom fields for TPOs.							
- Company Details - TPO Settings	Page 1 Page 2 Page	3 Page 4 Page 5						
TPO Fees	Custom Tab Name		1		Map Custom Fields t	o Loan Fields (Optional)		
TPO Custom Fields	The custom tab name i	Saplays on Company Details	> Custom Fields tab.					
- Air TPO Centact intermation		Field Description	Field Type		Loan Field ID	Loan Reld Description		
TPO Global Lender Contacts	Custom Field 1	LoanNEX.PricingTier.Wh	DROPDOWN	- B		9		
- TPO Docs - TPO Connect Site Managem	Custom Reld 2	LOBINEA Prong her com	DHUPDOWN	- 2		9		
TPO Disclosure Settings	Custom Field 3			Ŷ		9		
Investor Connect Settings	Custom Field 4			÷		4		
	Custom Field 5	1		~		9.		
eFolder Setup	Custom Reld 6			w.		9		
Docs Setup Secondary Setup	Custom Field 7			4		9		
Contact Setup	Custom Field 8			w.		2		
Loan Templates	Custom Field 9			~		a,		
ables and Fees	Custom Reid 10			5		9,		
Business Rules	Custom Field 11			~		۹.		
Dynamic Data Management System Administration	Custom Field 12			v.		۹.		
Additional Services	Custom Reld 13			4		9		
ersonal Settings	Custom Field 14			~		9		
	Custom Reld 15			4		a.		
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	Custom Reld 17			~		0		
	Custom Field 18			ų.		a		
	Custom Reld 19			4		9		
	Custom Reld 20	1		~		4		

- 1. Login to Encompass SmartClient
- 2. Select **Settings** from the Encompass drop-down on the top menu bar; the Encompass Settings window will open in a new window
- 3. Under External Company Setup, go to TPO Custom Fields
- 4. Create a new custom field:
 - a. Field Description
 - i. Format: LoanNEX.PricingTier.[ClientText]
 - ii. The custom field must start with LoanNEX.PricingTier.
 - b. Field Type: DROPDOWN
 - i. Do not select the Dropdown Editable option



and a second	Import Help							
Settings Overview CompanyUser Setup	TPO Custom Fields							
External Company Setup	Create global custom fe	Nits for TPOs.						
- Company Details - TPO Settings	Page 1 Page 2 Page	3 Page 4 Page 5						
TPO Fees	Custom Tab Name		2		Map Custom Fields t	o Loan Fields (Optional)		
TPO Reassignment TPO Custom Fields	The custom tab name displays on Company Details -> Custom Fields tab.							
All TPO Contact Information		Field Description	Field Type		Loan Field ID	Loan Field Description		
TPO Global Lender Contacta TPO Docs TPO Conset Site Managem TPO Disclosure Settings Investor Connect Settings Lean Setup Setup	Custom Field 1	LoanNEX Pricing Ter Who	DROPDOWN	- B		•		
	Custom Field 2	LoanNEX Pricing Ter Com	DROPDOWN			2		
	Custom Field 3					A		
	Custom Field 4			~		4		
	Custom Field 5			·		A		
	Custom Field 6				Custom Fr	eld Options		
Docs Setup Secondary Setup	Custom Field 7			~	Tier A		New	
Contact Setup	Custom Field 8			-	Ter B Ter C	(Carve		
- Loan Templates	Custom Field 9			~			Delate	
Tables and Fees	Custom Field 10			4			1.0	
Business Rules	Custom Field 11			-				
System Administration	Custom Field 12			~				
Additional Services	Custom Field 13	8					Conten	
Personal Settings	Custom Field 14			~				
	Custom Field 15			-				
	Custom Field 16			~			OK Cancel	
	Custom Field 17			~			ON CIPCH	
	Custom Field 18			-		4		
	Custom Field 19			~		4		
	Custom Field 20	1		~		a		

- c. Select the edit icon to enter the Custom Field Options
 - i. Click the New button and name your options based on your business needs
 - ii. When all options are added for the Custom Field, click the **Ok** button
- 5. Your Custom Field is now created

	Import Help								
Settings Overview Company/User Setup	Company Details	-							
Companyioser Setup	Add and manage the banks, lenders,	Company Details					×		
- Company Details	Company/Branches						-		
- TPO Fees	Search TPOs by Organization () No	Sales Reps / AE Lender Contacts	Warehouse Fees LO Comp Commit	ments Trade Mgmt	ONRP Notes TPO Connect Setup TP	O Docs Attachments Custom Reids			
- TPO Reassignment	Banks					Use Parent	the 🖌 💿		
TPO Custom Fields All TPO Contact Information TPO Global Lender Contacts TPO Docs	E-San Lenders	The fields below have been configu Page1	red by your company to capture additional	data for your business.					
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	Testing Tpoc1								
	Testing Ron						n	6/21/2021 09:25:00 AM	
	Broker1 Bobby						-		
	Broker1 Billy	2 Learn more					Close		
		1							

- 6. Under External Company Setup, go to Company Details
- 7. The last tab on the Company Details page is Custom Fields
 - a. Assign the Rate Sheet to the external organization via the dropdown options
 - b. Click the **Close** button



- 8. Associate the Custom Field with the LoanNEX Pricing Tier
 - a. LoanNEX Recommendation: Email <u>support@loannex.com</u> with the following information:
 - i. Field Description (ex: LoanNEX.PricingTier.Wholesale)
 - *ii.* All Dropdown options (ex: Tier A, Tier B, Tier C)
 - b. Click <u>HERE</u> for steps to login to LoanNEX and associate the Custom Field with the LoanNEX Pricing Tier, without LoanNEX assistance

Create Business Rule to Enable and Disable Access to Lock Request

- 1. Login to Encompass SmartClient
- 2. Select **Settings** from the Encompass drop-down on the top menu bar; the Encompass Settings window will open in a new window

C Encompass Settings					- 0 ×
Box Encompass Settings Go to Recent Import H	elp				
410 Print Form Groups Per Loan Custom Fields	Persona Access to Loan Actions				
Channel Options	Create and manage Persona Access to Lean Action	na rules.			
A RESPA - Changed Circumstances Setup	Loan Actions Access Rules (2)				D 4 2 × 1 2 D I Statistic Distriction
- Disclosure Tracking Settings	Name Lock Request - Disable Until Approved by UW	Channel Banked - Wholesale, Broke	Condition	Status Active	admin (Admin User) 01/13/2022 10:22 AM
Compliance Calendar 2009 GFE Print Trustee List Pigyback Loan Synchronization	Lock Request - Enabled	No channel selected, Bank		Active	admin (Admin User) 01/19/2022 10:22 AM admin (Admin User) 01/19/2022 10:22 AM
- Sync Templates Privacy Policy					
-Zipcode Setup HMDA Profiles					
-NMLS Report Setup					
eFolder Setup					
Docs Setup Secondary Setup					
E Contact Setup					
Loan Templates Tables and Fees					
Business Rules					
Loan Folder Business Rule Milestone Completion					
Loan Action Completion					
sing1 - Field Data Entry Field Triggers					
atrue Automated Conditions					
Persona Access to Fields					
Viel N Persona Access to Loans Viel N Persona Access to Loan Actional A Me					

- 3. Under Business Rules, go to Persona Access to Loan Actions
- 4. Click the **new** icon to open a new Persona Access to Loan Actions window

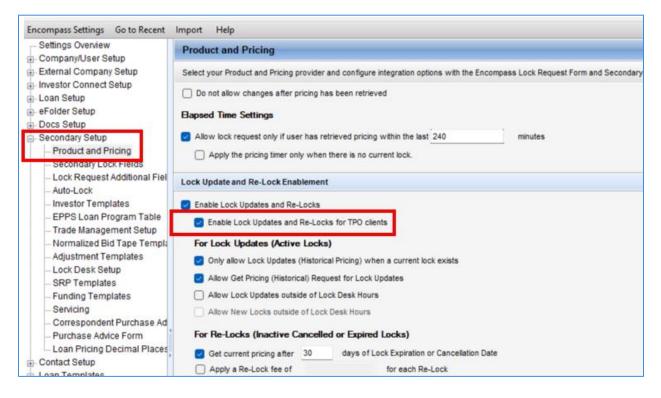


Persona Acce	ss to Loan Actions								
Create and manag	e Persona Access to Loan Actions rules.								
Loan Actions Ac	cess Rules (2)							🔉 🕼 🗹 🗙 🖻	Ac Ac
lame -	Channe	el Conditi	00				Status	Last Modified By	Last Mode
ock Request - Dis	Persona Access to Loan Actions					×	Active	admin (Admin User)	01/19/202
ock Request - En							Active	admin (Admin User)	01/19/202
	1. Create a Rule Name				Notes/Comments				
	Lock Request - Disable Until Approved by	UW			A Lock Request cannot be submitte	ed until the			
	2. Select all Channels this rule applies				loan is signed off by Underwriting. contact your account executive if y	Please			
	No channel selected	10			questions.				
	Banked - Retail								_
_	Banked - Wholesale								
	Brokered								
	Correspondent					· ·			
	3. Select a condition for this rule								
	O No - Always apply this rule								
	Yes - Apply this rule only if								
	Advanced Conditions 🗸 is				Q				
	4. Define a persona's Loan Action acc	and fare the second time							_
	Add an Action	ess for the condition	Assign Right						
	Loan Action	Add	Persona	Rights					
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		Remove	TPO - Client Admin	Enable			-		
_			TPO - LoanNEX	Enable					
-			External Org - Broker	Enable					
			External Org - Correspondent	Enable					
			TPO AE	Enable					
_			TPOJO	Enable	~				
	2 Learn more				Save Ca	ncel			
									1

- a. Create a Rule Name the business rule name should be descriptive, as LoanNEX will display the name to the User
- b. **Select all Channels this rule applies to** ensure the channels apply to loans entered through TPOC
- c. Select a condition for this rule: Yes Apply this rule only if
 - i. Select the Advanced Conditions dropdown
 - ii. Assign Field and Operator
- d. Define a persona's Loan Action access for the condition: Lock Request
- e. Assign Right: Disable for Personas for External Organizations (TPOC)



Enable Modifications for TPO Connect



- 1. Login to Encompass SmartClient
- 2. Select **Settings** from the Encompass drop-down on the top menu bar; the Encompass Settings window will open in a new window
 - 3. Under Secondary Setup, select Product & Pricing
- 4. Under the Lock Update and Re-Lock Enablement section, check the Enable Lock Updates and Re-Locks for TPO Clients checkbox
- 5. Select the Save icon



EPC Custom Field Mapping to/from LoanNEX

- 1. Login to Encompass LO Connect (encompassloconnect.com/admin)
- 2. Select the Admin tab on the menu at the top of the screen

🛃 Encompass'	4	ADMIN	
	E.		
COMPANY/USER ···		Services Management 1 Services Configured	Automation Rules Add Service
	^		
Services Management		LoanNEX Qualifier - Product and Pricing Service	
Data Permissions		Product and Pricing	
		Service Setups Credentials	
		Field Mapping Doc Mapping	
🖓 WORKFLOW TASKS	8		

- 3. Select Services Management on the left menu bar
- 4. Find LoanNEX Qualifier Product and Pricing
 - a. Select Field Mapping

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EI	Services Management / LoanNEX Qualifier - Product and Pricing Service Field Mapping	all Q	Add	Ċ I	<u>}</u> :
🕞 SERVICES 🔶					
Services Management					
Data Permissions					
S OPPORTUNITIES ···					
	^				
🕞 WORKFLOW TASKS					
➡ PROCESS AUTOM···	Click Add or Download Field Mapping Template				
	Map Encompass fields to/from or between Provider fields Add Field Mapping Template				

- 5. Click **Add** to add an individual mapping option, or click **Field Mapping Template** to download excel template and create multiple mappings
 - a. LoanNEX recommends starting with one field mapping to ensure you are yielding the appropriate results before adding additional field mappings

Encompass	ADMIN		II 0 2
COMPANY/USER ···	Services Management / LoanNEX Qualifier - Product and Pricing Service Field Mapping	Search all	Q Add ① 라 :
	Map Encompass fields to from or between Provider fields		
Services Management	Filter by V All		
Data Permissions	Encompass Field ID (Standard, Custom, LR) • Mapping Type • Provider Field Name • ① CUST02FV		
S OPPORTUNITIES ···			
	+ ADD ANOTHER This partner integration only allows up to 100 request and 100 response fields.		
(C) WORKFLOW TASKS	тте ратны недлика чед чисте да но посторахи или посторание нейоз.		

- 6. Add field values for custom mapping
 - a. Encompass Field ID (Standard, Custom, LR)
 - b. Mapping Type
 - c. Provider Field Name
- 7. Select **Add Another** as needed, or go back to the Field Mapping page to download an excel template and create multiple mappings

Customize NEXApp Field Option Naming Convention in LoanNEX

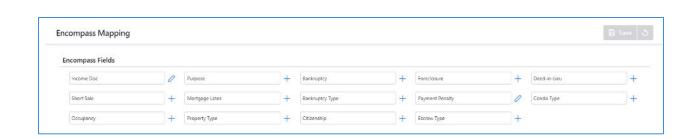
1. Login to LoanNEX at https://web.loannex.com/

LoanNEX*	🖞 Pipeline 🛛 🛱 Collabo	alion 🛛 🛱 Exchange	🔒 Reports 🛛 🛓 Guidelines	1			Add Scenario Q	? LoanNEX Lending
Loan NEX NEX App	Upload Loan to NEX App -							Manage Credit Screens Manage Regions Manage Pricing Manage Portfolios
	Citizenship *		Purpose * First Time Homebuyer		State * County *	Rural Property	[Client Admin
	Appraised Value *	3	Amount * Loan-to-Value	5	FICO* No FICO			 Resource Center Change Password
	Bankruptcy *	Foreclosure * Deed-in-Li None ¥ None	eu * Short Sale *	Mortgage Lates * DTI * 0X30X12 ¥ %	Months Reserves	Escrows * Ves V		6 Sign Out

- 2. Click your Company Name in the upper right of the screen
- 3. Select Client Admin



4. Scroll down and select **Field Name Mapping**, under Encompass Settings, on the left menu panel



- 5. The LoanNEX Client Admin Encompass Mapping Setup page opens
 - a. The fields shown are the NEXApp data points with a drop-down option (i.e., data points with more than one option possible in the NEXApp)
 - b. The pencil icon <a> indicates that the NEXApp default field option names have been updated
 - c. The plus icon $^+$ indicates that the NEXApp default field option names have NOT been updated
 - d. The Save and Undo button will not be available to select until a change has been made on the page
 - 6. Select the pencil or plus icon next to the NEXApp field you would like to customize for Encompass Mapping

Payment Penalty	Payment Penalty Mapping							
Field	Encompass Custom Field Value	Default						
Add +								

7. Select the Add option



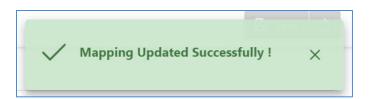
Payment Penalty	Mapping			×
Field	Encompass Custom Field Value		Default	
36	₹ 38	×	3 Year	×
60	₹ 5⊗	×	5 Year	×
Add +				
				Done

- 8. Select the Field drop-down option you would like to customize in Encompass
 - a. Based on your selection, the Field and Default will populate
 - b. **Default** is how the field option will be identified in the payload and cannot be updated
- 9. Enter the **Encompass Custom Field Value** naming convention you would like to display in Encompass
- 10. Select the Add button to add another Encompass Custom Field Value
- 11. Select the **Done** button once all Custom Field Values have been mapped
 - a. **IMPORTANT**: You must also select the **Save** button on the next page

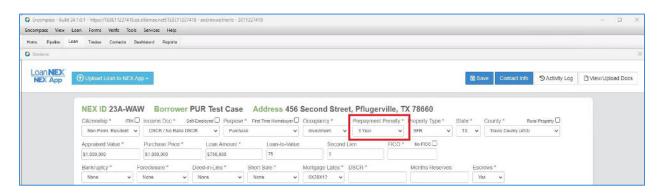


- 12. Select the Save button to activate custom mapping in Encompass
 - a. Select the **Undo** button to revert your changes and NOT activate the custom mapping in Encompass





13. A Success message will appear to let you know the custom mapping was activated



14. When pricing loans in Encompass, the custom field drop-down options will be displayed as configured in LoanNEX

LoanNEX Settings

Pricing Tier Settings

Important Notes

- The Lock Request Workflow Pricing Tier settings will dictate what Lock-it Settings are required
- Rate Sheet / Pricing Tier Tags steps only need to be completed if you have added a custom field for Pricing Tiers in the Encompass SmartClient Settings portion of this guide; see steps <u>HERE</u>

Lock Request Workflow

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

LoanNEX*	D Pipeline	2	Guidelines							ario Q	?	LoanNEX Lending
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1 C												P Change Password
	Citizenship *		Income Doc *	Self-Employed	Purpose *	First Time Homebuyer	Occupancy *	Property Ty	pe S	State *		
	US Citizen	~		*	Purchase		1	~	~	~		6 Sign Out

2. Click your Company Name in the upper right of the screen

3. Select Client Admin

C Exchange Buyer: Pri	icing Tiers		Minsigh Client Admin
General Bettings	Counterparty Pricing Tier 0	Sroups	
Notification Onicars NOX Asian Notification Procing Tasive Exchange Overall	+ Create Pricing Tier	Pablo Tier	
Anothistory Priving Texts Papered Access H Auto Last Numbering	Counterparty Individual Pr	cing Tier Groups	
 Admite Pad Respirative Settings Lock Settings Exception Respect Settings 	+ Create Pricing Tier		
III Curtem Peets	Reseller Pricing Tier Group	25	
	+ Create Pricing Tier		

- 4. Go to **Pricing Tiers** under Exchange Buyer
 - a. Open a Pricing Tier under **Counterparty Pricing Tier Groups** and scroll to the bottom of the page



I	Next Steps Workflow:		
	Disable Access to Register Product AND Lock Request	~	
ĺ	Disable Access to Register Product AND Lock Request		
	Register Product OR Request Lock		
	Register Product THEN Request Lock		_
De	Request Lock Only	cel	el
	Register Product Only		

- b. Select an option from the Next Steps Workflow drop-down
 - *i. N/A Don't allow Access to Register Product or Lock Request*
 - ii. Select **Register Product or Lock Request** if you would like to give the User the option to either Register a Product, or Request a Lock
 - iii. Select **Register Product then Lock Request** if you require a 2-step Registration and Lock process
 - iv. Select **Lock Request Only** if you do not require Registration prior to locking a loan
 - If selected, you do <u>not</u> need to complete the Product Registration Settings in <u>LoanNEX Lock-it Settings</u> section below
 - v. N/A Register Product Only
- c. Click the **Save** button
- d. Repeat steps for each Pricing Tier under Counterparty Pricing Tier Groups

Rate Sheet / Pricing Tier Tags

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

Loan NEX ®	D Pipeline	*	Guidelines							Q	?	LoanNEX Lending
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								10			1	Ag Catent Aumin
								10				Change Password
	Citizenship *		Income Doc *	Self-Employed	Purpose *	First Time Homebuyer	Occupancy *	Property Type *	State 1		ŀ	

- 2. Click your Company Name in the upper right of the screen
- 3. Select Client Admin

our Settings	Counterparty Pricing Tier (iroupa	
Nuthsatan Growen NoCA Ages Pricing States ange Deven	+ Create Pricing Tier	Pablo Tier parter	
Notifications Priving Term	Counterparty Individual Pr	cing Tier Groups	
Padris Access Auto Lear Numbering Alarce Pol Represeiver Settings Lock Settings Evocation Request Settings	+ Create Pricing Tier		
Custom Prests	Reseller Pricing Tier Grou	is in the second s	

- 4. Go to **Pricing Tiers** under Exchange Buyer
- 5. Find and open the Pricing Tier associated with the new Custom Field under **Counterparty Pricing Tier Groups**

Group Name *	
Wholesale Rate Sheet Tier 1	ă
Description *	
Wholesale Rate Sheet Tier 1	
Tags:	

- 6. Find Tags and enter the Custom field Option associated with the Pricing Tier
 - If you <u>do not</u> see your custom Tag, please contact support@loannex.com
- 7. Click the **Save** button
- 8. Repeat steps for each Rate Sheet Custom Field Option and the corresponding Pricing Tier under **Counterparty Pricing Tier Groups**



LoanNEX Lock-it Settings

Important Notes

- Product Registration Settings do <u>not</u> need to be completed if you selected "Lock Request Only" when setting up your <u>Lock Request Workflow</u>.
- Both Product Registration Settings and Lock Settings are <u>required</u> if you selected "Register Product or Lock Request," or "Register Product then Lock Request" when setting up your <u>Lock Request Workflow</u>.
- Custom Fields are optional, and can be used to ask for additional information from the User, prior to them Registering or Locking the loan

Product Registration Settings (Save to LOS)

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

LoanNEX	Pipeline	4	Guidelines						enario 🤇	Q ?	LoanNEX Lending
											🕒 Manage Portfolios
E NE	К Арр 💿 ир	oad Los	an to NEX App +					00 Se	re Con	tact Ir	😂 Client Admin
											P Change Password
	Citizenship *		Income Doc *	Self-Employed	Purpose *	First Time Homebuyer	Occupancy*	Property Type *	State *		
	US Citizen	~		~	Purchase	~		· · ·			🕪 Sign Out

- 2. Click your Company Name in the upper right of the screen
- 3. Select Client Admin



4. Go to Registration Settings under Exchange Buyer

egistration Settings
Iler Registration Label
imment on Request Registration Page
nding Registration Comment (Comment after the registration was requested)
quest Registration URL Link (Investor/Lender Portal Link)
prove Registration Comment

- 5. Seller Registration Label enter a button label for the User's next step
 - a. 20-character limit
 - b. LoanNEX Recommendation: Save to LOS
- 6. **Comment for Registration Information Page** message displayed to Users on the Request Registration Page
 - a. LoanNEX Recommendation: Thank you for saving your loan with **Client Name**, someone will reach out to you within 24 hours for further instructions. For questions email our lock desk <u>lockdesk@client.com</u>
- 7. **Pending Registration Comment** message displayed to Users after the Registration is submitted
 - a. Must be in HTML format
 - b. LoanNEX Recommendation: Thank you for saving your loan with Client Name, someone will reach out to you within 24 hours for further instructions. For questions email our lock desk lockdesk@client.com
- 8. Request Registration URL Link enter your Encompass TPO Connect URL
- 9. Approved Registration Comment message emailed to Users after the Registration is Approved
 - a. Must be in HTML format
 - b. LoanNEX Recommendation: Your loan save has been approved, please login to our portal to take the next step in the loan process.

□ Require Loan File (DU 3.2 or MISMO 3.4)
Allow Quick Price
Require DTI / DSCR
Require Months Reserves

- 10. Do **<u>NOT</u>** select the **Require Loan File** checkbox, as the file is already in the LOS via TPOC
- 11. Option to Allow Quick Price select checkbox if allowed
 - a. Option to Require DTI / DSCR if Allow Quick Price checkbox is selected
 - b. Option to Require Months Reserves if Allow Quick Price checkbox is selected



B ×		
Registration Requested Documents		
+ Add Document		
Elapity Name	Last Updated	Visw File

- 12. Click the **Add Document** button to upload files, which will be provided to the User with the Registration confirmation email
 - a. Examples: Submission Checklist, Lock Requirements
- 13. Save by clicking the disc icon

Lock Settings

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

Loan NEX*	D Pipeline	±	Guidelines				Add		٩	?	LoanNEX Lending
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E NEX	App 🕤 Uplos	d Loa	n to NEX App +				<u> </u>	Save	Contact		Client Admin
ſ										Г	P Change Password
3	Citizenship *		Income Doc * Self-Employed	Purpose *	First Time Homebuyer	Occupancy *	Property Type	State			
	US Citizen	*		Purchase		~		*	~		(+ Sign Out

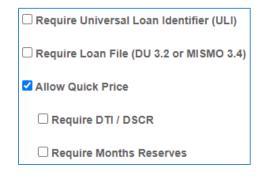
- 2. Click your Company Name in the upper right of the screen
- 3. Select Client Admin

Lock Settings			Managé Cilorit Ann
Deneral Settings	Request Lock Link		
4 Vees	High investigational care		
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A Nettomere	Lock confirmed. Please access our portar link above for the record of confirmation.		
Ø Prong Terr			
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28 Auto Loan Numbering			
\$ Admin Fee	Require Universit Loon (dentifier (UU))		
a Reponse Setting			
a Lack Settings	Thequire Loss File (DU 3.2 or MISMO 3.4)		
Cooperation Request Settings	CAllow Guick Price		
Cutton Farits			
	Lock Requested Documents		
	+ Add Closenere		
	Display Name	Last Updated	Manue Film

- 4. Go to Lock Settings under Exchange Buyer
- 5. **Request Lock Link** enter your Encompass TPO Connect URL
- 6. Request Lock Comment message displayed to Users after the Lock Request is submitted



- a. LoanNEX Recommendation: Thank you for locking your loan with **Client Name**, we will get back to you within 24 hours with approval. For questions email our lock desk <u>lockdesk@client.com</u>
- 7. Approved Lock Comment message emailed to Users after the Lock is Approved
 - a. LoanNEX Recommendation: Your lock has been approved with **Client Name**. Please access our portal link above for the record of confirmation.
- 8. Seller Lock Label enter a button label for the User's next step when they want to lock a loan
 - a. 20-character limit
 - b. LoanNEX Recommendation: Request Lock



- 9. Option to Require Universal Loan Identifier (ULI) select checkbox if required
- 10. Option to Require Loan File select checkbox if required
- 11. Option to Allow Quick Price select checkbox if allowed
 - a. Option to Require DTI / DSCR if Allow Quick Price checkbox is selected
 - b. Option to Require Months Reserves if Allow Quick Price checkbox is selected

1	⊠ ×		
8	Lock Requested Documents		
	+Add Excurrent		
	Ospisy Name	Lost Updated	View File

- 12. Click the **Add Document** button to upload files, which will be provided to the User with the Lock Request confirmation email
 - a. Examples: Submission Checklist, Lock Requirements
- 13. Save by clicking the disc icon



Create Custom Fields in LoanNEX

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

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-										Ľ	Client Admin
	Citizenship *			Purpose *	Fest Time Homebuyer	Occupancy *	Property Type				

- 2. Click your Company Name in the upper right of the screen
- 3. Select Client Admin

Custom Fields			Manage Clorel Admin
General Settings	Fadd Name	Required	Assignments
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 Notification Groups 			
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III Lock Settings			
2 Exceptor Request Settings			
El Cumin Faille			

4. Go to Custom Fields under Exchange Buyer

Field Name	Required	Assignments	
		None selected -	×
		Lock Request	
+ Add Custom Field		Registration	
Coup		Exception	
Save			

- 5. Click the Add Custom Field link
- 6. Enter a Field Name
 - a. Examples: Title / Escrow Order Number
- 7. Option to make Custom field Required select checkbox if required
- 8. Custom field can have **Assignments** to different actions in the lock process, which will be shown on the submittal pages in LoanNEX
 - a. Select the checkbox for all that apply:
 - i. Lock Request
 - ii. Registration Request
 - iii. Exception Request
- 9. Click the **Save** button