

## USER SETUP GUIDE

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

The screenshot shows the LoanNEX home dashboard. The top navigation bar includes 'Upload Loan', '+ Add Scenario', and 'Add Scenario'. The main content area contains various loan-related input fields such as 'Loan Type', 'Citizenship', 'Income Doc', 'Purpose', 'First Time Homebuyer', 'Occupancy', 'Property Type', 'Appraised Value', 'Purchase Price', 'First Lien Amount', 'LTV', 'Secondary Financing', 'State', 'County', 'Rural Property', 'FICO', 'No FICO', 'DTI', 'Months Reserves', 'Mortgage Rates', 'Bankruptcy', 'Foreclosure', 'Deed-in-Lieu', 'Short Sale', 'Escrows', and 'Temporary Buydown'. A 'Get Price' button is visible. On the right side, a user profile for 'Jane Smith' is shown with a dropdown menu containing options like 'Manage Credit Screens', 'Manage Regions', 'Manage Pricing', 'Manage Portfolios', 'Client Admin' (highlighted with a red box), 'Resource Center', 'Change Password', and 'Sign Out'.

### 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 main content area is titled 'Users' and features an '+ Add New' button (highlighted with a red box) and a table of existing users. The table has columns for Name (NMLS), Branch (NMLS), Pricing Tier, Status, and Last Updated. A single user is listed with Name 'LoanNEX Lending', Branch 'Corporate', and Status 'Active'.

### 3. CREATE NEW USER

The screenshot shows the 'Add New User' form. It includes the following fields: Branch (dropdown), UserName, Email, First Name, Last Name, Title, Nmls, Cell #, Work # / Extension, User Roles (dropdown), Pricing Tiers (dropdown), Next Steps (Send To) (dropdown), Pricing Tables (dropdown), Pipeline Access (text field with '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

### 4. ONCE SAVED, AN AUTOGENERATED EMAIL WILL BE SENT TO THE USER, WITH