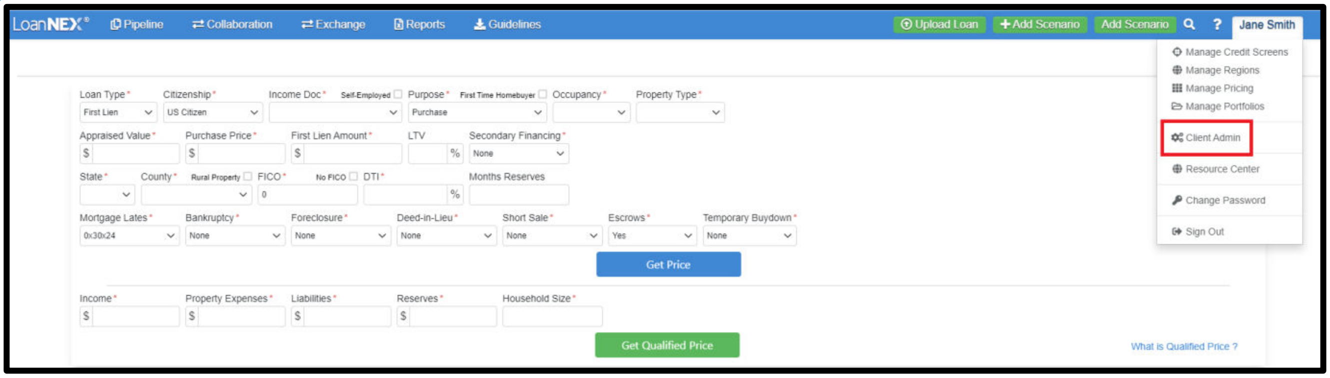
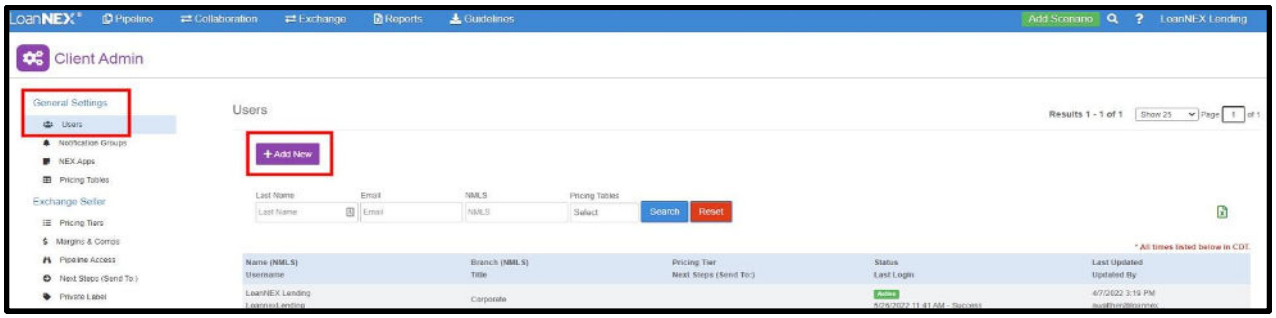
LoanNEX®

USER SETUP GUIDE

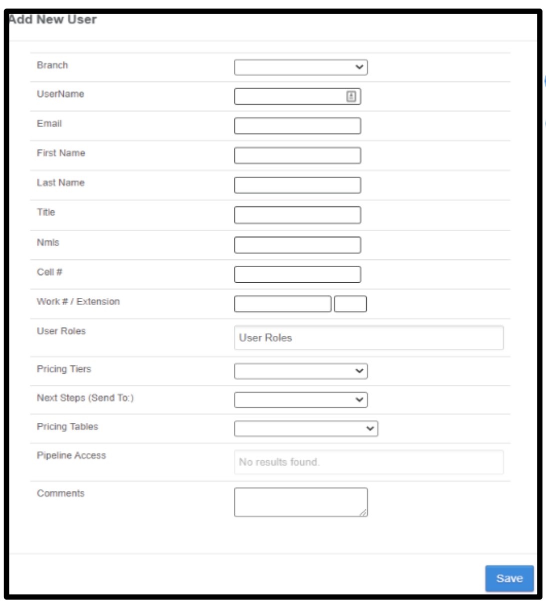
1. LOGIN TO YOUR LOANNEX ACCOUNT AND GO TO THE CLIENT ADMIN SECTION



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



3. CREATE NEW USER



- 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

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