
MARGINS AND COMPS

Client Admin Setup Guide for User Margins

MAY 14, 2025

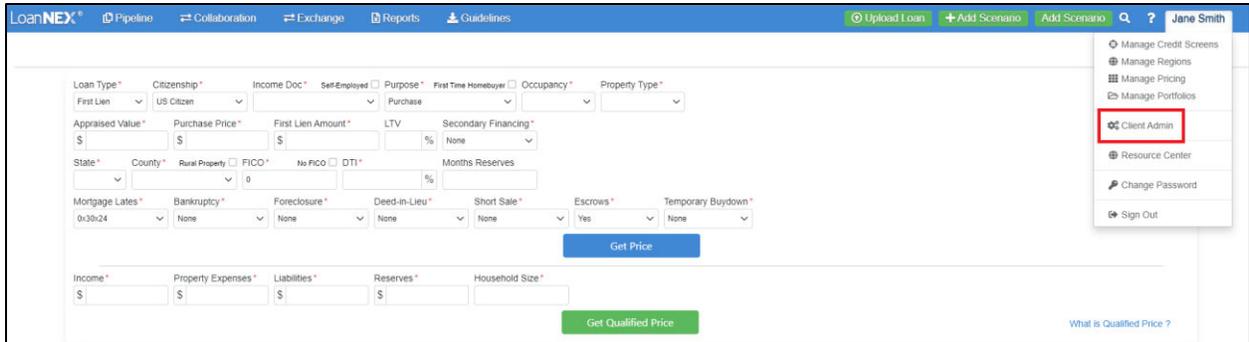
LoanNEX

support@loanex.com

16 North Central Avenue, Saint Louis, MO 63105

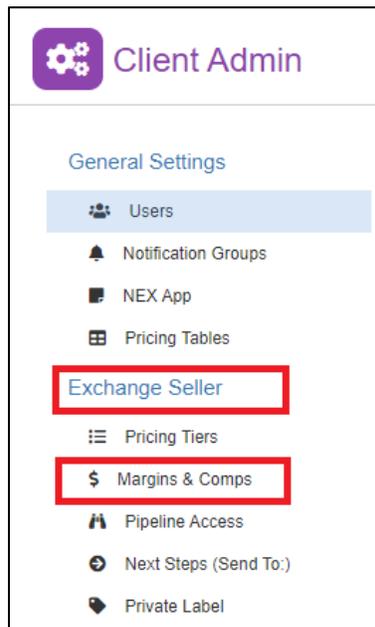


1. Login to LoanNEX at <https://web.loannex.com/>



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

3. Select **Client Admin**



4. From the left toolbar select **Margins & Comps**, under **Exchange Seller**



Margins & Compensations

Results 1 - 4 of 4 Show 25 Page 1 of 1

[+ Add New](#)

* All times listed below in CDT.

Name	Type	User Count	Last Updated	Updated By
101	Margin	0	0/24/2023 10:44 AM	ChrisRenderDemo
121	Margin	0	0/24/2023 10:44 AM	ChrisRenderDemo
95	Margin	16	0/4/2024 9:37 PM	ChrisRenderDemo
Test Margin Group 1	Margin	1	0/4/2024 9:37 PM	ChrisRenderDemo

5. Select the **Add New** button

Margin/Compensation Group

Type *

Name *

Description *

Tags:

6. Enter the Margin or Compensation Group information:
- a. **Type:** select Margin or Compensation from the dropdown
 - b. **Name:** Enter a Name for the Group
 - c. **Description:** Enter a Description for the Group
 - d. **Tags:** applicable to Encompass TPOC Integration Users only



Available Users
Showing all 16
Filter
Move Users to see Margins
>> > <<<
Alicia Ripp (Active)
chrisadmin (NA) rendler (Active)
cbrandler (NA) test (Active)
Chris (NA) rendler (Active)
Alicia Ripplinger (Not Active)
Sonny Gee (Active)
Erika Baker (Active)

Selected Users
Empty list
Filter
Must be moved to selected to see Margins

Available Investors/Lenders
Showing all 8
Filter
Move Investors that need margins added
>> > <<<
(N) Huron Homes
(N) Emerald Wholesale
(N) Diamond Mortgage
(N) Premier Financial
(N) Pinnacle Mortgage
(N) Superior Lending: WS
(N) LoanNEX

Selected Investors/Lenders
Empty list
Filter
Must be moved to selected to apply margins

Available Investors/Lenders: Programs
Empty list
Filter
>> > <<<

Selected Investors/Lenders: Programs
Empty list
Filter
Does NOT need to be moved to apply margins
None selected = applied to all

Available Products
Showing all 44
Filter
>> > <<<
1/1 ARM (10 Yr. Term)
1/1 ARM (30 Yr. Term)
3/1 ARM (30 Yr. Term)
3/1 ARM IO (30 Yr. Term) (10 Yr. IO)
4/1 ARM (30 Yr. Term)
5/6 ARM (30 Yr. Term)
5/6 ARM IO (30 Yr. Term) (5 Yr. IO)

Selected Products
Empty list
Filter
Does NOT need to be moved to apply margins
None selected = applied to all

- e. **Available Users:** Move Users who should see Margins or Compensation applied in this Group to the **Selected Users**
 - i. **Selected Users:** Users that will see the Margins or Compensation applied in the Group
- f. **Available Investor/Lenders:** Move Investors that need margins added to the **Selected Investors/Lenders**
 - i. **Selected Investors/Lenders:** Investors that will have margins added
- g. **Available Investor/Lenders: Programs:** Move Programs that need margins added to the **Selected Investors/Lenders: Programs**
 - i. If NO Programs selected, all Programs for the Investors selected will have margins applied
- h. **Available Investor/Lenders: Products:** Move Products that need margins added to the **Selected Investors/Lenders: Products**
 - i. If NO Products selected, all Products for the Investors or Programs selected will have margins applied



Loan Amount		Gross Price Caps		Margin Adj/Cap		Fee	Margin/Fee Price Caps		
Min	Max	Floor	Ceiling	%	Floor	Ceiling	\$	Floor	Ceiling

7. Add Margin or Compensation
8. Select the **Save** button