USER MANAGEMENT

Client Admin Setup Guide

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LoanNEX
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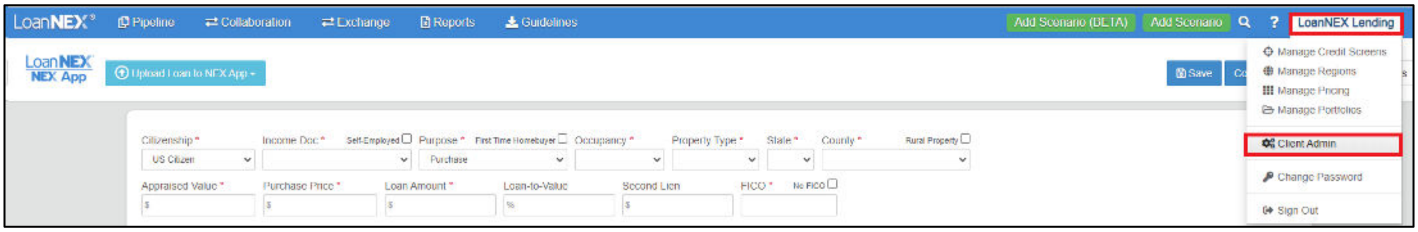
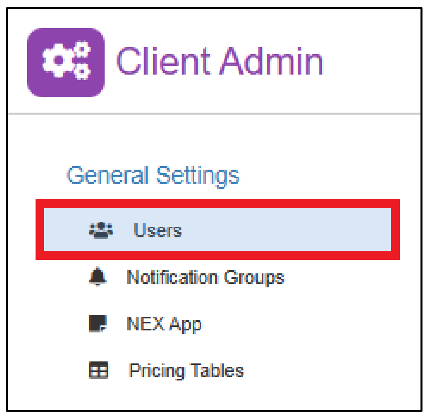
Contents

Access Users in LoanNEX

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



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

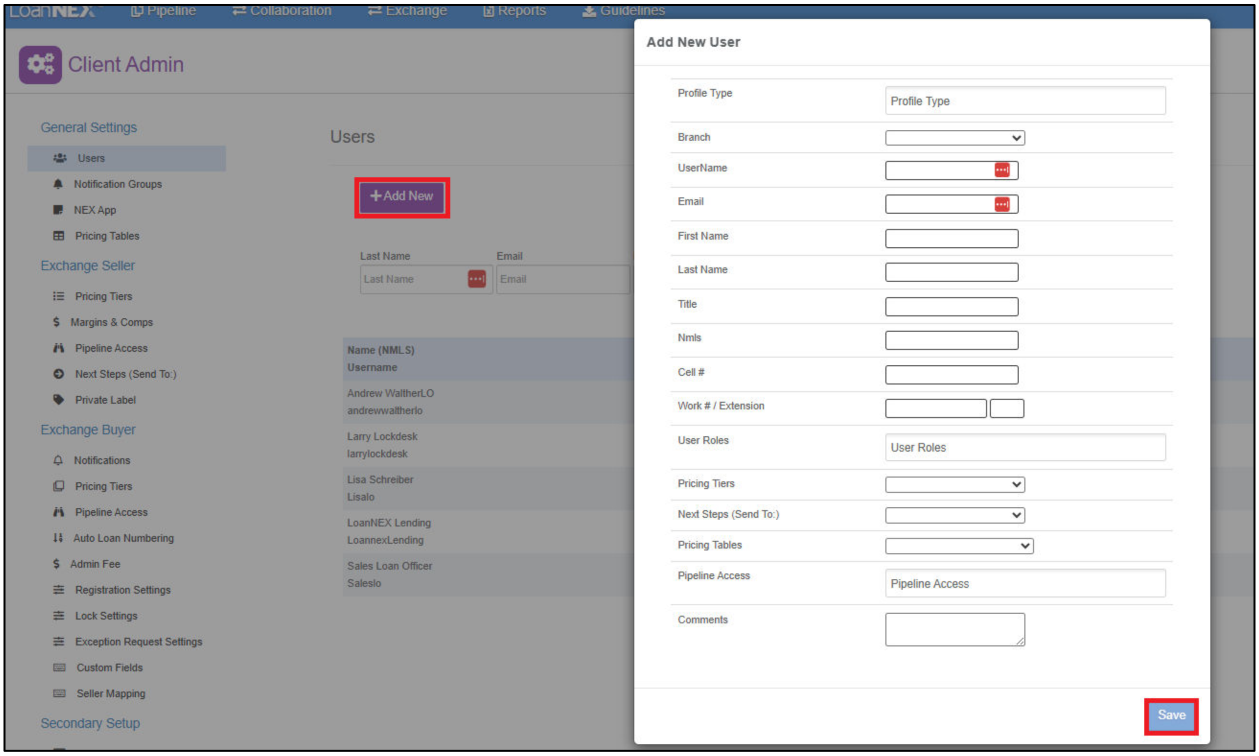


4. The Client Admin section will default to the Users page. You can also select **Users** from the left menu bar.

User Management

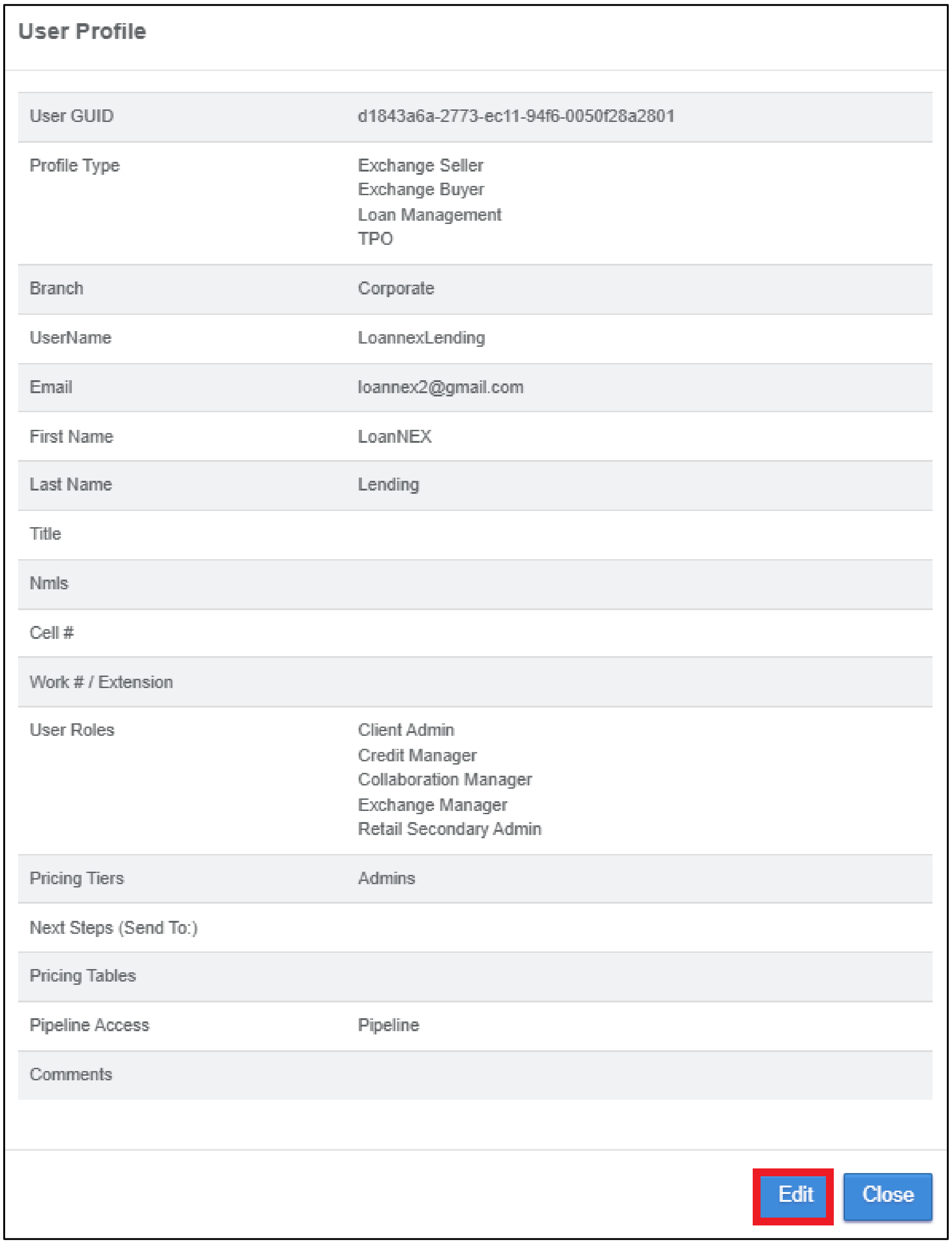
Add New User

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. Once on the **Users** page, select the **Add New** button
5. Enter the details on the Add New User pop-up window:
    a. Profile Type – if applicable
    b. Branch – select Corporate if Branch not applicable
    c. Username
    d. Email
    e. First Name, Last Name, Title, NMLS, Cell, and Work Phone
    f. User Roles – if applicable
        i. See LoanNEX Admin User Roles & Access guide for additional information
    g. Pricing Tier Group assignment – if applicable
    h. Next Steps Group assignment – if applicable
    i. Pricing Tables Group assignment – if applicable
    j. Pipeline Access Group assignment – if applicable
6. Click the **Save** button
    a. Email Sent to the User with instructions to activate Account and login
7. Repeat steps as needed for all new Users
    a. If you have a large number of Users to add, LoanNEX support can assist in uploading the Users on your behalf

Edit Existing User



User Profile

User GUID	d1843a6a-2773-ec11-94f6-0050f28a2801
Profile Type	Exchange Seller Exchange Buyer Loan Management TPO
Branch	Corporate
UserName	LoannexLending
Email	loannex2@gmail.com
First Name	LoanNEX
Last Name	Lending
Title	
Nmls	
Cell #	
Work # / Extension	
User Roles	Client Admin Credit Manager Collaboration Manager Exchange Manager Retail Secondary Admin
Pricing Tiers	Admins
Next Steps (Send To:)	
Pricing Tables	
Pipeline Access	Pipeline
Comments	

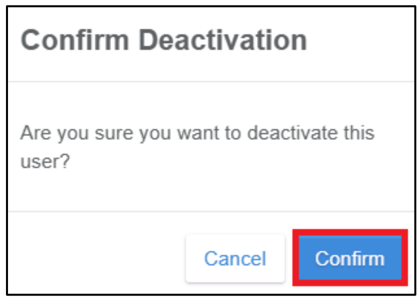
Edit Close

1. Navigate to **Client Admin** and **Users**
2. Select the row of the User you need to edit
3. Select the Edit button
4. Make necessary updates to the User details
5. Click the Save button

Deactivate (Disable) User

1. Navigate to **Client Admin** and **Users**
2. Find the row of the User you need to deactivate

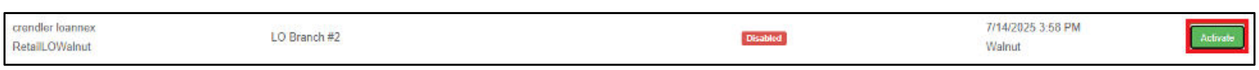
3. Select the **Disable** button on the User row



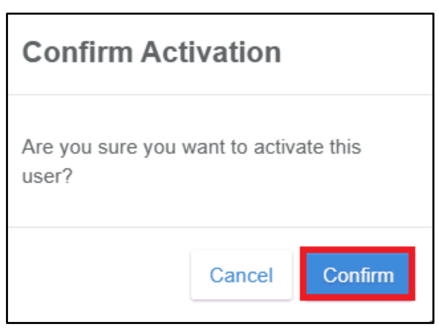
4. Select the **Confirm** button to confirm the deactivation
5. Deactivated Users are automatically logged out

Reactivate User

1. Navigate to **Client Admin** and **Users**
2. Find the row of the User you need to reactivate
    a. Disabled Users are shown at the bottom of the User list



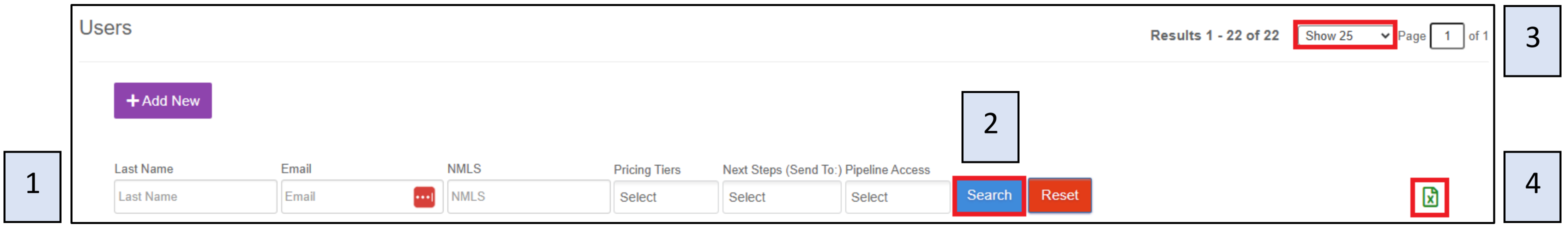
3. Select the **Activate** button on the User row



4. Select the **Confirm** button to confirm the activation
5. Reactivated Users retain their original settings and permissions. Edit the User to adjust settings if applicable.

Search, Filter, and Export User List

Note: The User list is sorted by Active Users, then Disabled Users, in alphabetical order



1. Use the field boxes at the top of the page to **search or filter** the user list
    a. Search or filter by: Last Name, Email, NMLS, Pricing Tier group, Next Steps group, or Pipeline Access group
2. Select the **Search** button
3. Select the number of users to display per page (25, 50, 100)
4. Select the **File Icon** to export the user list to CSV format
    a. Export file includes additional User details, including UserGUIDs required for LoanNEX integration setup

Audit Trails

- The User List includes a **Last Login** column that shows the most recent login attempt for each user, including the date, time, and whether the attempt was successful or failed.
- The **Last Updated / Updated By** column displays the date and time of the most recent change to each user profile (including initial creation), along with the username of the individual who made the update.