
USER MANAGEMENT

Client Admin Setup Guide

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LoanNEX

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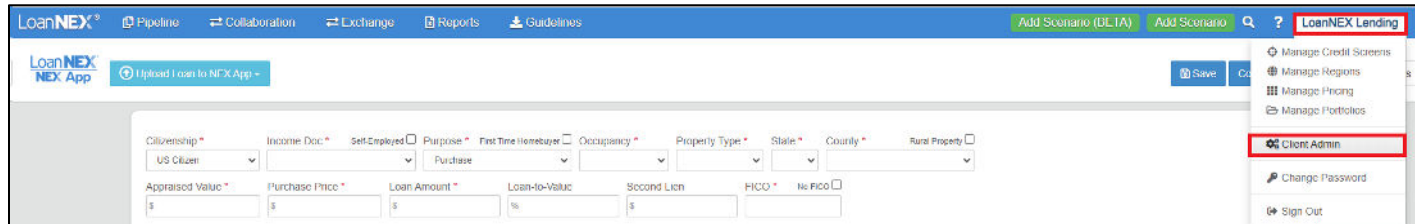
Contents

Access Users in LoanNEX.....	2
User Management.....	2
Add New User	2
Edit Existing User	4
Deactivate (Disable) User.....	5
Reactivate User	5
Search, Filter, and Export User List.....	6
Audit Trails.....	6

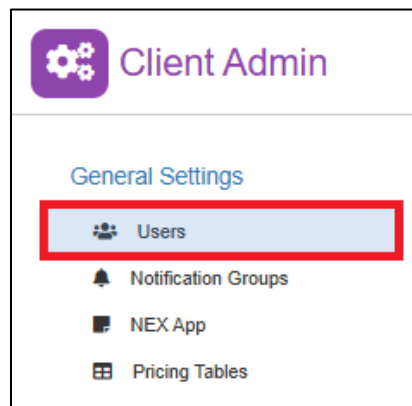


Access Users in LoanNEX

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**



The screenshot displays the LoanNEX Client Admin interface. On the left, a sidebar menu includes sections for General Settings (Users, Notification Groups, NEX App, Pricing Tables), Exchange Seller (Pricing Tiers, Margins & Comps, Pipeline Access, Next Steps (Send To), Private Label), Exchange Buyer (Notifications, Pricing Tiers, Pipeline Access, Auto Loan Numbering, Admin Fee, Registration Settings, Lock Settings, Exception Request Settings, Custom Fields, Seller Mapping), and Secondary Setup. The main area shows the 'Users' page with a table of existing users and a red-bordered '+ Add New' button. An 'Add New User' pop-up window is open on the right, containing the following fields: Profile Type (text input), Branch (dropdown), Username (text input with a red 'x' icon), Email (text input with a red 'x' icon), First Name (text input), Last Name (text input), Title (text input), Nmls (text input), Cell # (text input), Work # / Extension (two text inputs), User Roles (text input), Pricing Tiers (dropdown), Next Steps (Send To) (dropdown), Pricing Tables (dropdown), Pipeline Access (text input), and Comments (text area). A red-bordered 'Save' button is located at the bottom right of the pop-up window.

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	
<div><div>Edit</div><div>Close</div></div>	

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

arendler ioannex RetailLO/Walnut	LO Branch #2	Active 4/4/2025 11:21 AM - Success	5/22/2025 2:59 PM Walnut	Disable
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3. Select the **Disable** button on the User row

Confirm Deactivation

Are you sure you want to deactivate this user?

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

arendler ioannex RetailLO/Walnut	LO Branch #2	Disabled	7/14/2025 3:58 PM Walnut	Activate
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3. Select the **Activate** button on the User row

Confirm Activation

Are you sure you want to activate this user?

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

The screenshot shows the 'Users' management page. At the top right, it says 'Results 1 - 22 of 22'. Next to it is a dropdown menu set to 'Show 25' and a 'Page 1 of 1' indicator. On the left, there is a '+ Add New' button. Below this is a search and filter bar with fields for 'Last Name', 'Email', 'NMLS', 'Pricing Tiers', 'Next Steps (Send To)', and 'Pipeline Access'. Each field has a corresponding dropdown or input box. To the right of these fields are 'Search' and 'Reset' buttons. At the far right of the search bar is a file icon for exporting to CSV. Numbered callouts are placed as follows: 1 points to the search/filter fields, 2 points to the 'Search' button, 3 points to the 'Show 25' dropdown, and 4 points to the file icon.

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.