
NEX APP SETTINGS

Client Admin User Guide

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LoanNEX

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NEX App Overview

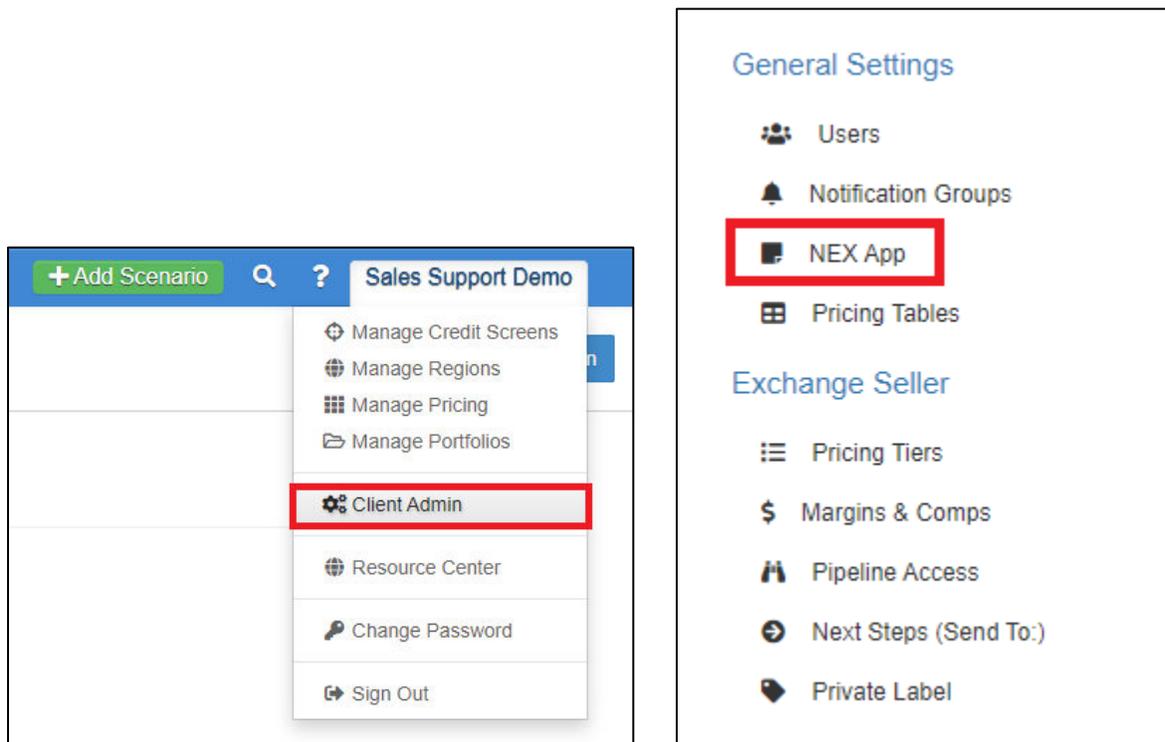
NEX App Settings allow you to customize the dropdown selections available for main loan attributes, apply price filters to control how available programs and pricing will appear to your users, and hide areas (buttons) of the LoanNEX platform.

Important Notes

- Assign NEX App Settings to Users in the Next Steps workflow
- Users with Client Admin profiles can access and create the NEX App Settings section



Access NEX App Settings in LoanNEX Client Admin



1. Select your Username in the upper right corner of the screen and select **Client Admin**
2. From the left menu, select **NEX App** under General Settings



Create a Custom NEX App

The screenshot shows the LoanNEX Client Admin interface. The top navigation bar includes the LoanNEX logo, navigation icons, a '+ Add Scenario' button, a search icon, a help icon, and the text 'Sales Support Demo'. The main content area is titled 'Client Admin' and features a sidebar menu with items like 'Users', 'Notification Groups', 'NEX App', 'Pricing Tables', 'Exchange Seller', 'Pricing Tiers', 'Margins & Comps', 'Pipeline Access', 'Next Steps (Send To:)', and 'Private Label'. The 'NEX App' item is highlighted. The main content area is titled 'NEX App Settings' and includes a '+ Add New' button. Below the button is a table with columns 'Name', 'User Count', 'Last Updated', and 'Updated By'. A note '* All times listed below in CDT.' is displayed below the table. The page also shows 'Results 1 - 0 of 0', a 'Show 25' dropdown, and 'Page 1 of 0'.

1. Select the **Add New** button
 - All existing NEX Apps will appear on the NEX App Settings page
 - The NEX App Settings page will display the NEX App Name, number of users assigned the NEX App, as well as when the settings were last updated and who made the changes

The screenshot shows the 'NEX App Settings' form. It has two fields: 'Name *' and 'Description *'. The 'Name *' field is a single-line text input, and the 'Description *' field is a multi-line text area.

2. Enter a **Name** and **Description** to help identify the purpose of the NEX App customizations



3. Define your NEX App customization(s)

The screenshot displays the '1) Attributes' section of the NEX App customization interface. A red box highlights the header '1) Attributes' and the instruction 'Select the options to exclude:'. Below this is a list of attributes: Citizenship, Income Doc, Purpose, Occupancy, Prepayment Penalty, Property Type, # of Units, Condo Type, State, Bankruptcy, Bankruptcy Type, Foreclosure, Deed-in-Lieu, Short Sale, Mortgage Lates, Escrows, Loan Type, Secondary Financing, and Temporary Buydown. The 'Occupancy' attribute is selected, indicated by a checkmark in a small box. To the right, the 'Occupancy' section shows three radio button options: 'Primary', 'Second Home', and 'Investment'. The 'Investment' option is selected and highlighted with a red box. A blue arrow points from this box to a dropdown menu for 'Occupancy *' which shows 'Primary' and 'Secondary' as available options, indicating that 'Investment' has been excluded.

- Attributes (dropdown selections) – Select options to **EXCLUDE** from the NEX App
 - Select the loan attribute on the left
 - Select the checkbox to **exclude** the option on the right
 - *Example: Select Occupancy on the left, and then select the Investment checkbox on the right, to **exclude** Investment from the dropdown selections on the NEX App*



2) Tooltips

| |
|--|
| FICO <input checked="" type="checkbox"/> |
| Income |
| Mo. Rental Income |
| Property Expenses |
| Liabilities |
| Reserves |
| # of Financed Properties |

FICO

Qualifying FICO Score

The qualifying FICO credit score (e.g. low Borrower's middle score).

FICO * No FICO DTI * Months Reserves

0 %

Qualifying FICO Score
The qualifying FICO credit score (e.g. low Borrower's middle score).

- Tooltips – apply tooltip language to a NEX App field by
 - Select the loan attribute on the left
 - Enter a Tooltip **Header** and **Body**
 - *Example: Select FICO on the left, and then enter the tooltip header and body, to expose on the NEX App*



3) Price Filters

Select the options to exclude:

Target Price / Points

Admin Fee

Broker Compensation

Select defaults for filter:

Target Price / Points

Lock Period

Target Price / Points
 Price Points
101

Lock Period
 15 25 30 35 45 50 60 75 90

Eligible Products

Select all Fixed **30 Yr. Fixed**

Select all Arm 4 Yr. ARM 5 Yr. ARM

Amortizing Type: Fully Am & IO
Lock Period: 30
Investor/Lender: All
Program: All
Show Best per Investor/Lender:

Search Rate: 101.000 **Price** Points
Admin Fee: Exclude From Price

| Rate | Lock Period | Price | Product | Investor/Lender |
|-------------------|-------------|-----------------------|--------------|---------------------------------|
| 9.500% 30 Days | 30 Days | 101.000 \$4,500.00 | 30 Yr. Fixed | Sales and Supp CR Prime Jumb |
| 9.500% 30 Days | 30 Days | 101.000 \$4,500.00 | 30 Yr. Fixed | Sales and Supp CR Prime Jumb |
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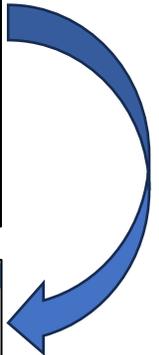
- Price Filters – exclude options, or apply pre-configured Price, Points, and Lock Period filters to the NEX App Pricing Table
 - Select the filter on the left
 - Select the **Price** or **Points** checkbox, and enter the desired filter
 - Select the **Lock Period** checkbox to **DEFAULT** the Pricing Table to the desired filter
 - *Note: Users still have access to update these filters on the Pricing Table*



4) Areas
Select the options to exclude:

| | |
|----------|-------------------------------------|
| Sections | <input checked="" type="checkbox"/> |
| Buttons | <input checked="" type="checkbox"/> |

Sections
 Qualified Price
Buttons
 Activity Log

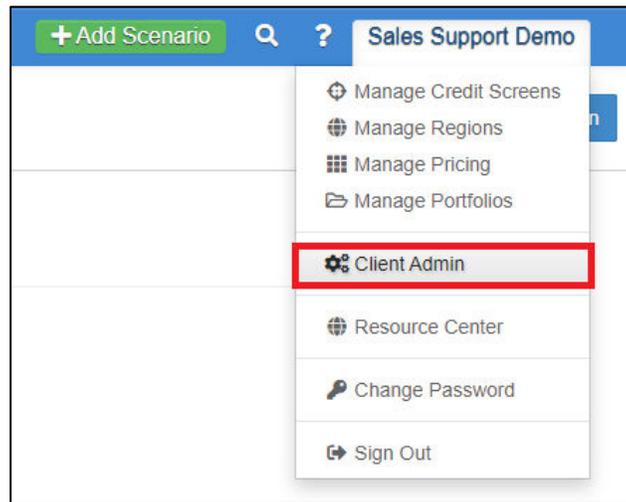


- Areas (NEX App buttons) – Select options to **EXCLUDE** areas from the NEX App (areas are accessible through LoanNEX NEX App buttons)
 - Select **Sections** to expose the option to **EXCLUDE** the **Qualified Price** button and area of the NEX App
 - Select **Buttons** to expose the option to **EXCLUDE** the **Activity Log** button and area of the NEX App

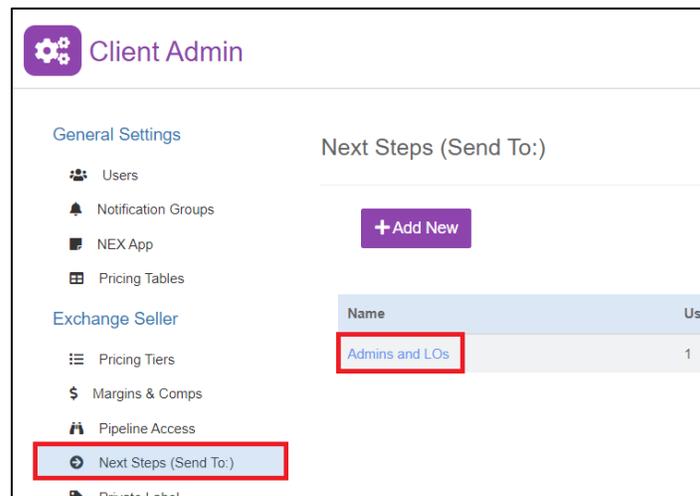
4. Once all NEX App customizations are complete, select the **Save** button
 - Select the **Cancel** button to Cancel the updates
 - Select the **Delete** button, and confirm, to Delete the NEX App Settings



Assign Users to Custom NEX App



1. Select your name in the upper right corner of the screen and select **Client Admin**



2. From the left menu, select **Next Steps (Send To:)** under Exchange Seller
3. Select the appropriate Next Steps link, or select the **Add New** button to create a Next Steps group



Next Steps (Send To:)

Name *
Admins and LOs

Description *
All Admins and LOs

Available Users
Showing all 2
Filter
>> >
Alicia Ripp (Active)
Krista Ard (Active)

Selected Users
Showing all 1
Filter
< <<
Sales Support Demo (Active)

Notification Group(s)
No results found.

NEX Apps
Custom NEX App

Restrict Access to Investor/Lender
* Removes the ability for a user to "Submit Scenario" or "Request Exception" directly to the investor/lender.

Disable Qualified Price

Delete Save Cancel

4. Select the appropriate NEX App from the **NEX Apps** dropdown
 - o The NEX App settings will be applied to the **Selected Users**
 - o **Note:** As New Users are added to your organization, they will need to be moved from **Available Users** to **Selected Users** in the appropriate **Next Steps (Send To:)** group to see the custom NEX App
5. Select the **Save** button