Admin User Roles & Access

Summary

LoanNEX has specific User Roles that users can be assigned. A User can be assigned to as many or as few roles as needed. User Roles are the following:

- Client Admin
- Credit Manager
- Exchange Manager
- Retail Secondary Admin – applicable to Retail Lock Accounts only

Additional details on Role Permissions are listed below.

Client Admin

Users with Client Admin Access are given access to the following:

- General Settings
- User Management
- Exchange Seller Settings
- Exchange Buyer Settings
- Secondary Setup

Credit Manager

Users with Credit Manager Access are given access to the following:

- Pricing Manager
  - Rate Sheets
  - LLPAs
  - Extension Configuration
  - Products
- Credit Screen Manager
  - Eligibility
  - Manage Regions

Exchange Manager

Users with Exchange Manager Access are given access to the following:

- Exchange Pipeline – Loans on which a lock event has occurred will be visible to users, and they are able to interact with said loans from a buyside perspective
- Users with access to 'Exchange Manager' overrules assigned Pipeline access and gives users access to all loans in the Exchange

Retail Secondary Admin

Users with Retail Secondary Admin Access are given access to the following:

- Sell Side Pricing Tab – access to the Sell Side Pricing tab to compare the pricing scenario against all Investor/Lender pricing