Seller Specific Rules

Buyside Credit Manager Setup and User Guide

January 2026

LoanNEX Seller Specific Rules: Table of Contents

Need Additional Guidance? Contact **investorsupport@loannex.com**. Our team can recommend best practices based on your use case.

Select the link to go directly to page

1. [Overview, Use Cases, and Implementation Steps](#)

2. [Seller Specific LLPAs](#)

3. [Seller Specific Eligibility](#)

Overview, Use Cases, and Implementation Steps

Use Cases

- Creating price specials for specific sellers, tied to specific loan criteria and/or a given time frame
- Buying loans against approved seller guidelines
- Seller Specific Eligibility Rules (both expanding and contracting)

Key Capabilities

- Map sellers to one or more groups via **Seller Mapping (new column = Seller Tag)**
- Apply seller or seller group specific logic **without cloning base programs or products**
- Layer custom **LLPAs** and/or **Max Price** rules on top of default configurations for specific sellers
- Modify or override **eligibility rules** (hard stops / soft stops) per seller or seller group
- Combine **global rules** with seller-specific customizations
- Support seller-level targeting across: **Primary Screens, Overlays, Soft Stops, LLPAs**

Steps to Implement Seller Specific Rules

1. Create Seller Tag(s)
2. Apply Tags to LLPAs
3. Configure Eligibility Rules

Seller Specific Rules - LLPAs

Step 1 – Assign Seller Tag

1. **Client Admin → Exchange Buyer: Seller Mapping**
2. Assign Tag to Seller(s)
   - **Individual Seller assignment**:
     - Click in the **Seller Group** column for the Seller you want to update
     - Use the **drop-down** to assign an existing tag, **- or -** type a new tag name and press Enter
   - **Multiple Seller assignment**:
     - <u>Hold</u> Control and click each **Seller Name** you want to update with the same tag *(Selected Seller rows will appear with blue background)*
     - Click **Assign Tag** button on Seller Mapping page *(Number of selected Sellers will display)*
     - Use the **drop-down** to assign an existing tag **- or -** type a new tag name and select the **'+'** icon
     - Select **Apply Tag** button on the pop-up window
3. Click **Save** button on Seller Mapping page

*Assign **Individual Seller** Tag*

*Assign **Multiple Sellers** to the same Tag*

Step 2 – Apply Tags to LLPAs

1. Navigate to **Manage Pricing → LLPAs**
2. Create the LLPA using the standard process
   - For general guidance, see the *Manage Adjustments Setup Guide* in the LoanNEX Resource Center
3. In the LLPA, open the **Seller Group** dropdown and select the tag(s)
   - Multiple selections are allowed
   - Available operands: In, Not In, and No Tag
4. Configure the remaining LLPA criteria
   - In this example, the LLPA is triggered off of **FICO** and **LTV**
5. Click **Save**
6. Attach the LLPA to the appropriate products
   - For more information, see the *Manage Adjustments Setup Guide* in the LoanNEX Resource Center

Tag Defined, this LLPA will apply to sellers tagged as Group 'G'

Seller Specific Rules – LLPAs (Summary Page)

Seller Tag Visibility

- Go to **Manage Pricing → LLPAs**
- View the new **Tags** column – provides visibility into which LLPAs are tied to specific seller groups
- If an LLPA is configured with tags, the column will display the applicable value(s)

Step 3 – Configure Eligibility Rules

Buyside users with **Credit Manager access** can now create eligibility rules for a specific seller or group of sellers.

1. Navigate to **Credit Manager**
2. Choose **Rule Type**
   - When deciding how to configure rules, use these guidelines:
     - **Primaries** – best when there are **many rules custom to a seller** or when **eligibility is tiered**
     - **Overlays** – best when there are **just a few rules** that vary for a specific seller or group of sellers
     - **Soft Stops** – optional warnings that flag conditions without blocking the loan
3. **Configure Rules**
   - Create eligibility rules using the same approach as LLPAs in earlier steps
   - All rule types include **tag visibility**, making it easy to identify which rules apply to specific sellers or seller groups
4. **Attach Rules to Programs**
   - After configuration, attach the eligibility rules to the relevant programs so they take effect

Submit a Case to LoanNEX Support

1. Select the appropriate email address below:

   ➤ Client Support / Configuration Settings: support@loannex.com

   ➤ Eligibility & Pricing Inquiries: investorsupport@loannex.com

   ➤ Sales: sales@loannex.com

   ➤ General Inquiries: info@loannex.com

   ➤ Billing Inquiries: support@loannex.com

2. Include Contact Information: Name, Company Name, Email, Telephone

3. Include a detailed description of your Case

4. A Case will be created, and the appropriate LoanNEX Team member notified

5. LoanNEX will respond within one business day to address your Case