
MARGINS AND COMPS

Client Admin Setup Guide for User Margins

JANUARY 1, 2026

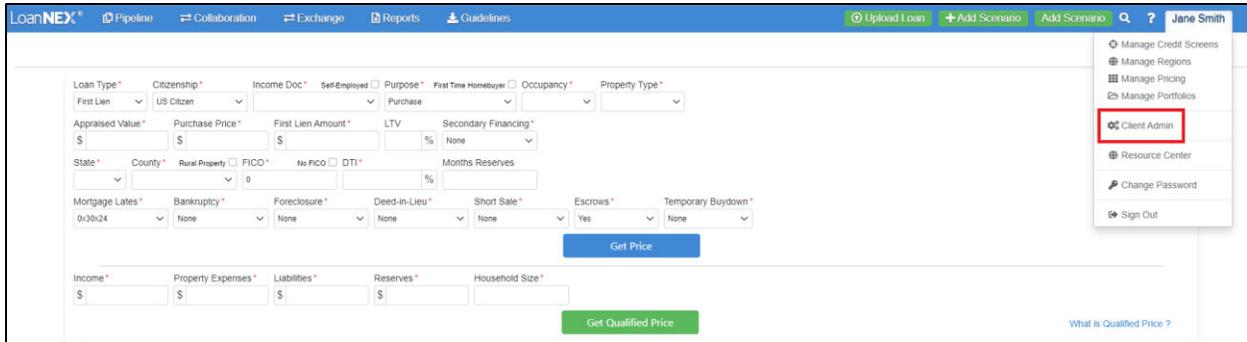
LoanNEX

support@loanex.com

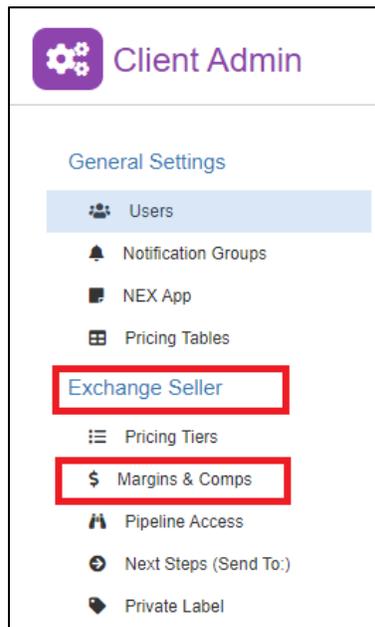
16 North Central Avenue, Saint Louis, MO 63105



1. Login to LoanNEX at <https://web.loanex.com/>



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



4. From the left toolbar select **Margins & Comps**, under **Exchange Seller**



Margins & Compensations

Results 1 - 4 of 4 Show 25 Page 1 of 1

[+ Add New](#)

* All times listed below in CDT.

Name	Type	User Count	Last Updated	Updated By
101	Margin	0	0/24/2023 10:44 AM	ChrisRenderDemo
121	Margin	0	0/24/2023 10:44 AM	ChrisRenderDemo
95	Margin	16	0/4/2024 9:37 PM	ChrisRenderDemo
Test Margin Group 1	Margin	1	0/4/2024 9:37 PM	ChrisRenderDemo

5. Select the **Add New** button

Margin/Compensation Group

Type *

Name *

Description *

Tags:

6. Enter the Margin or Compensation Group information:
- a. **Type:** select Margin or Compensation from the dropdown
 - b. **Name:** Enter a Name for the Group
 - c. **Description:** Enter a Description for the Group
 - d. **Tags:** applicable to Encompass TPOC Integration Users only



Available Users
Showing all 16
Filter:
>> > <<< <<
Alicia Ripp (Active)
chrisadmin (NA) rendler (Active)
cbrandler (NA) test (Active)
Chris (NA) rendler (Active)
Alicia Ripplinger (Not Active)
Sonny Gee (Active)
Erika Baker (Active)

Selected Users
Empty list
Filter:
>> > <<< <<
Must be moved to selected to see Margins

Available Investors/Lenders
Showing all 8
Filter:
>> > <<< <<
(N) Huron Homes
(N) Emerald Wholesale
(N) Diamond Mortgage
(N) Premier Financial
(N) Pinnacle Mortgage
(N) Superior Lending: WS
(N) LoanNEX

Selected Investors/Lenders
Empty list
Filter:
>> > <<< <<
Must be moved to selected to apply margins

Available Investors/Lenders: Programs
Empty list
Filter:
>> > <<< <<
Does NOT need to be moved to apply margins
None selected = applied to all

Selected Investors/Lenders: Programs
Empty list
Filter:
>> > <<< <<
Does NOT need to be moved to apply margins
None selected = applied to all

Available Products
Showing all 44
Filter:
>> > <<< <<
1/1 ARM (10 Yr. Term)
1/1 ARM (30 Yr. Term)
3/1 ARM (30 Yr. Term)
3/1 ARM IO (30 Yr. Term) (10 Yr. IO)
4/1 ARM (30 Yr. Term)
5/6 ARM (30 Yr. Term)
5/6 ARM IO (30 Yr. Term) (5 Yr. IO)

Selected Products
Empty list
Filter:
>> > <<< <<
Does NOT need to be moved to apply margins
None selected = applied to all

- e. **Available Users:** Move Users who should see Margins or Compensation applied in this Group to the **Selected Users**
 - i. **Selected Users:** Users that will see the Margins or Compensation applied in the Group
- f. **Available Investor/Lenders:** Move Investors that need margins added to the **Selected Investors/Lenders**
 - i. **Selected Investors/Lenders:** Investors that will have margins added
- g. **Available Investor/Lenders: Programs:** Move Programs that need margins added to the **Selected Investors/Lenders: Programs**
 - i. If NO Programs selected, all Programs for the Investors selected will have margins applied
- h. **Available Investor/Lenders: Products:** Move Products that need margins added to the **Selected Investors/Lenders: Products**
 - i. If NO Products selected, all Products for the Investors or Programs selected will have margins applied



Loan Amount		Gross Price Caps		Margin Adj/Cap		Fee	Margin/Fee Price Caps		
Min	Max	Floor	Ceiling	%	Floor	Ceiling	\$	Floor	Ceiling

7. Add Margin or Compensation
8. Select the **Save** button