PROGRAM AND NEX APP FIELD LOCKDOWN
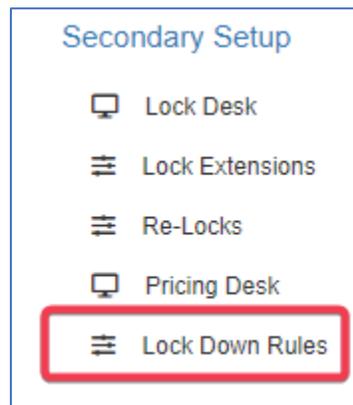
Client Admin User Guide

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Lock Down Rules Overview

The Lock Down settings enable you to restrict and control program changes and editing NEX App fields for originating users.

- **Program Lock Down**: Restricts originating users to the program they originally registered/locked.
- **Lock Down NEX App Fields**: Prevents originating users from editing all, or specified, NEX App data within LoanNEX when the loan reaches a Status or Milestone configured in your settings. When Lock Down NEX App Fields is enabled, originating users modifications to the defined fields must occur in the Loan Origination System (LOS).
  - **NEX App Fields (Dropdown selector)**: Allows you to select specific fields to lock down at the specified Status and/or Milestone identified.
  - **Important Note**: Field Lock Down does not persist to the next Status or Milestone. Field Lock Down needs to be configured for each Status/Milestone where you want to restrict the data points.

Access Lock Down Settings in LoanNEX Client Admin

1. Select your Username in the upper right corner of the screen
2. Select **Client Admin**
3. From the left menu bar, find **Secondary Setup**
4. Select **Lock Down Rules**

Program Lock Down

When **Program Lock Down** is enabled, originating users are restricted to modifying their registration or lock only to the originally selected program.

Options for Locking Down Programs:
- **By Status:**
  - o The program can be locked down at the time of Registration or Lock.
- **By Milestone:**
  - o The program can be locked down at a milestone configured within the Loan Origination System (LOS).

Program Lock Down – Example: In this example, the **Program Lock Down** feature is enabled when the loan status is **Locked**.

- **Originating Users** will **NOT** be able to modify the program after a loan is locked. Any program changes must be made before the loan reaches the locked status.
- **Buyer users** will retain the ability to adjust the program, even for locked loans and be able to open the additional programs up to the originating users if needed.

Lock Down NEX App Fields

Options for Locking Down NEX App Fields:
- **By Status:**
  - Lock down all LoanNEX fields at the time of Registration or specify individual fields for locking based on their status.
- **By Milestone:**
  - Lock down all LoanNEX fields or individual fields based on milestones configured within the Loan Origination System (LOS).
  - **Important Note**: Lock Down by Milestone does not persist to the next Milestone. You will need to configure (create new line item) for each Milestone where the Lock Down should apply.

Lock Down NEX App Fields – Example: In this example, the **Program Lock Down** feature is enabled for locked loans, specifically targeting two fields: **Income Documentation (Income Doc)** and **Occupancy Status (Occupancy)**.

- **Originating Users** will **NOT** be able to modify the values for **Income Doc** and **Occupancy** within LoanNEX. Any changes to these fields must be made directly in their Loan Origination System (LOS) before accessing LoanNEX.
- **Buyer users** will retain the ability to adjust both the **Income Doc** and **Occupancy** fields within LoanNEX.