
AUTO LOAN NUMBERING

Client Admin Setup Guide

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Overview

Auto loan numbering allows buyers to automatically assign Investor/Lender **Loan Number** to locks based on configurable settings in Client Admin. This removes the need for manual entry and ensures consistent, searchable loan identifiers.

Setup Auto Loan Numbering

1. Login to LoanNEX at <https://web.loannex.com/>
2. Navigate to your Username in the upper right and select **Client Admin** from the drop-down
3. Under **Exchange Buyer**, select **Auto Loan Numbering**
4. Choose the appropriate Auto Loan Numbering [configuration](#) option for your organization
5. Select the **Save** button

6. Post-Lock Editing

- After a loan is locked, the Investor/Lender **Loan Number** can be edited by buyer users by going to **Edit Lock Details > Loan Number > Save**
- Post-Lock Editing is available regardless of the Auto Loan Numbering setting selected
- **⚠ Important Note:** Manual updates made post-lock can result in duplicate loan numbers. This is expected system behavior and should be considered when searching by loan number or reviewing reporting.



Configuration Options

1. Disable (Default Option)

- No automatic numbering occurs
- Investor/Lender can manually add loan numbers post-lock if needed

2. Use Universal Loan Number:

- Copies the **Universal Loan Identifier (ULI)** from lock request form into Investor/Lender **Loan Number** field
- **⚠ Important Recommendation:** Set the Universal Loan Number as a required field for the Lock Request form in **Lock Settings (Client Admin → Lock Settings)**

3. Use Originator Loan Number

- Copies **Originator Loan Number** from lock request form into Investor/Lender **Loan Number** field
- **⚠ Important Recommendation:** Set the Originator Loan Number as a required field for the Lock Request form in **Lock Settings (Client Admin → Lock Settings)**

4. Custom Sequence

- Fully customizable auto-numbering format; utilize any combination of configurations options:
 - **Organization Code**
 - **Year (YYYY)**
 - **Month (MM)**
 - **Loan Number Prefix**
 - **Starting Number** (numbers increase sequentially with each lock)
 - **Loan Number Prefix**
- **Notes:**
 - Once **Starting Number** is entered and the setting is **Saved**, the field changes to **Current Number** and cannot be updated
 - Custom Sequence can be disabled anytime; numbering stops and new setting is applied

Custom Sequence

Organization Code

Year

Month

Loan Number Prefix

Current Number * (Max. 9 digits)

Loan Number Suffix

Example

Please Note: Changes to these loan numbering settings can result in duplicate loan numbers. Care should be taken to review the impact of changes before making them.



View and Search for Loan Number

The Investor/Lender **Loan Number** is a key identifier used throughout LoanNEX:

- View on the Transaction Summary page
- View and search in the Buyer Exchange
- Included in the Exchange Pipeline Report
- Used by sellers to search within the Seller Pipeline

Example:

In this example, configuration is setup to use **Originator Loan Number**, which copies the Originator Loan Number into Investor/Lender **Loan Number** field

Transaction Summary: View Investor/Lender Loan Number

Transaction Summary			
Product and Pricing		Requested On	
Investor Name	Gold Bridge	Company Name	Gold Bridge
Loan Type	First Lien	Users Full Name	GoldBridge Retail Secondary Admin
Program Name	Alps - Expanded Prime	Requested On	4/22/2026 11:58:23 AM
Mortgage Product	30 Yr. Fixed IO (10 Yr. IO)	Approved on	
Rate	6.250 %	Company Name	
Price	100.300	Users Full Name	
Lock Period	30	Lock Requested	
ARM Margin and Cap		Identifiers	
Index, Margin		Originator Loan Number	2026041156
FPA/Cap/Life		Universal Loan Identifier	
Lock Information		Loan Number	2026041156
Investor Name	Gold Bridge	Lock Number	
Lock Date	4/22/2026 11:58:23 AM		

Exchange: View and Search Investor/Lender Loan Number

The screenshot shows the LoanNEX Exchange interface. A search bar at the top contains the loan number 2026041156. Below the search bar, there are tabs for 'Registration Requested', 'Lock Eligible', 'Lock Requested' (17), 'Lock Approved', 'Modifications' (4), 'Exceptions' (7), 'Sold', and 'Rejected / Canceled'. The search results show a single entry for loan 233-TXT with a loan amount of \$560,000. The entry details include: Purchase | SFR | Saint Louis, CO; Entry Date: 4/22/2026; Occupancy: PR; Originator: Gold Bridge; Program: Alps - Expanded Prime; Product: 30 Yr. Fixed IO (10 Yr. IO); Rate / Price: 6.250 / 100.300; Lock Period: 30; Income: \$0; Property Expenses: \$0; Liabilities: \$0; Assets: \$0; LTV / CLTV: 70% / 70%; FICO: 750.

Seller/Originator Pipeline: Search Investor/Lender Loan Number

The screenshot shows the LoanNEX Pipeline interface. A search bar at the top contains the loan number 2026041156. Below the search bar, there are tabs for 'Pipeline', 'Active', 'Primary Locks', and 'Secondary Locks'. The search results show a single entry for loan 233-TXT. The entry details include: NEX ID Portfolio: 233-TXT; Borrower Entered Date: Last Name, Example 4/18/2026; Location Property Type: Saint Louis, CO SFR; Purpose Occupancy: Purchase PR; NEXscore Amount: F4-\$580,000; Product Amortization: 30 Yr. Fixed IO; Rate Points: ; Originator Loan Officer: Gold Bridge GoldBridge LO.