

Setting up the API connection

To establish the connection between LoanBeam and your LOS/POS, you must first capture the API (Application programming interface) key.

Important Note!

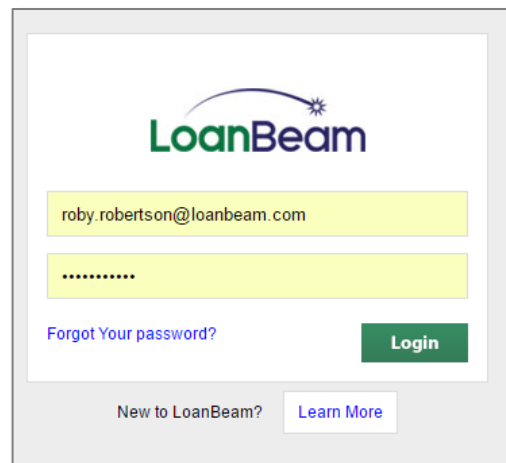
Before you begin the steps outlined below, make sure you meet the following parameters:

- You are an Administrator User to POS/LOS AND LoanBeam.
- You have successfully logged into LoanBeam.
- You have used the SAME email address for LOS/POS AND LoanBeam. Examples:

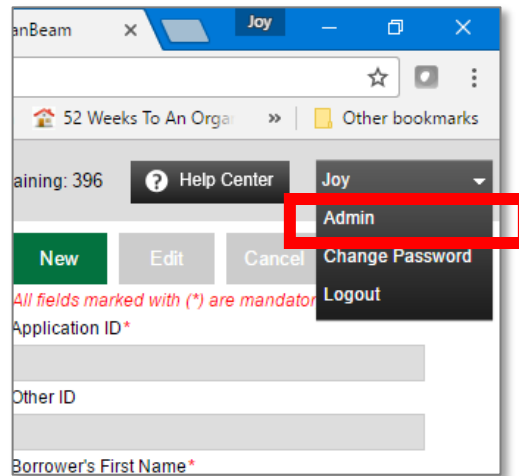
LoanBeam	LOS/POS	Status
Johnny.somebody@loanbeam	Johnny.somebody@loanbeam	Acceptable
Johnny.somebody@loanbeam	jsomebody@loanbeam.com	Not Acceptable
Johnny.somebody@loanbeam	Johnny.somebody@lb.com	Not Acceptable

To make the connection, follow these steps:

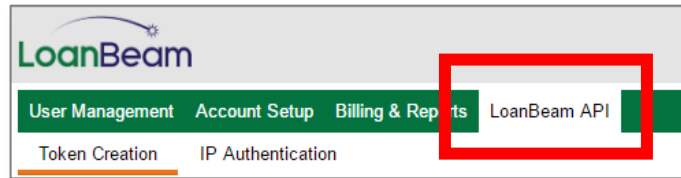
- 1) Log into your LoanBeam dashboard.
(secure.loanbeam.com)



2) Using the dark-gray drop-down box containing your name at the top right of the LoanBeam dashboard, click “Admin.”



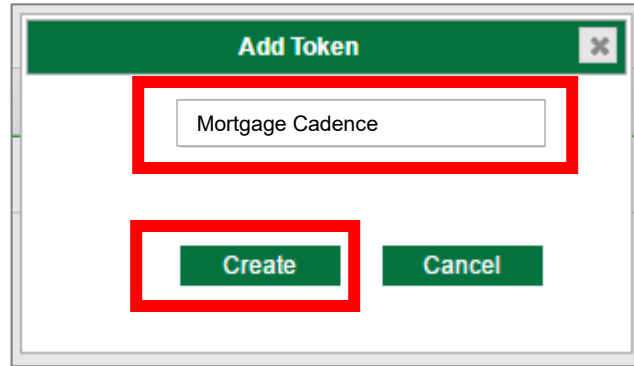
3) Click “LoanBeam API” from the top menu.



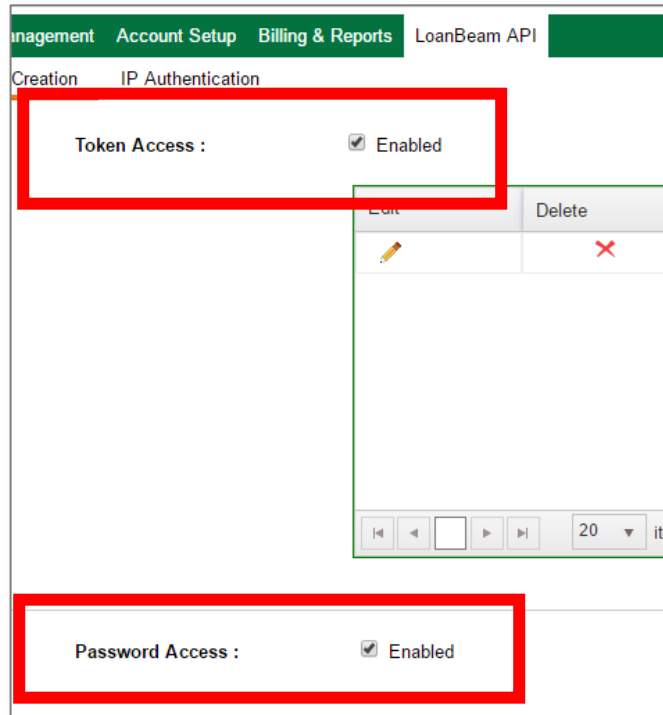
4) Click “Add token.”



5) Create a name for the token, for example, “Mortgage Cadence.” Then, click “Create.”



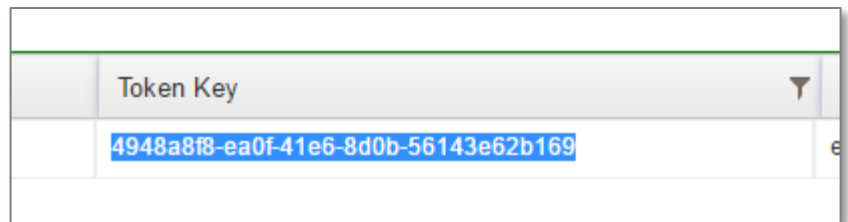
6) Check the “Enabled” box for “Token Access” and “Password Access.”



7) Click “Save.”



8) Copy the API key by clicking-and-dragging your mouse across the number and pressing “CTRL+C” on your keypad.



9) Paste the API key into your platform.

Note – process varies by LOS/POS