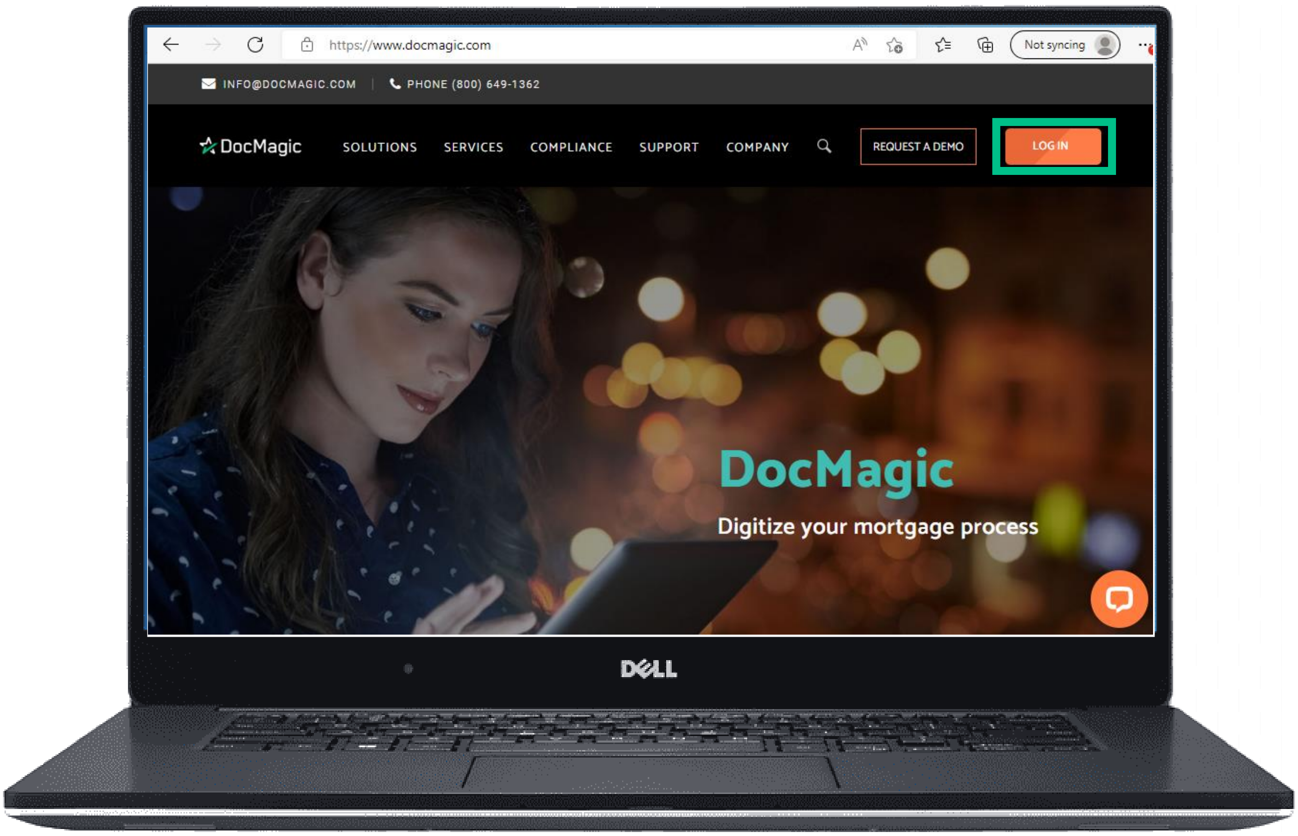
DocMagic

Partner Admin

Partner Admin

Navigating to Partner Admin

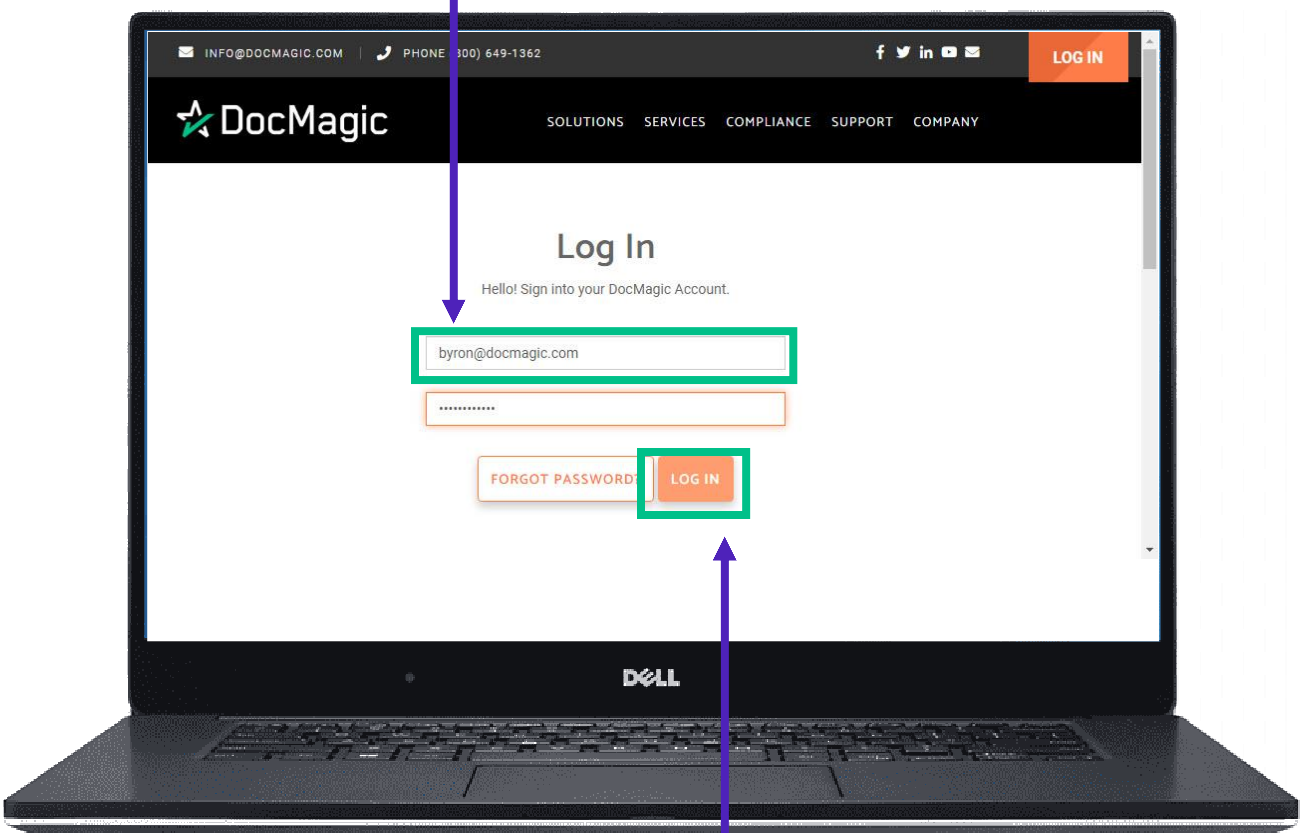
Go to www.docmagic.com



Partner Admin

Navigating to Partner Admin

Login with your email and password.

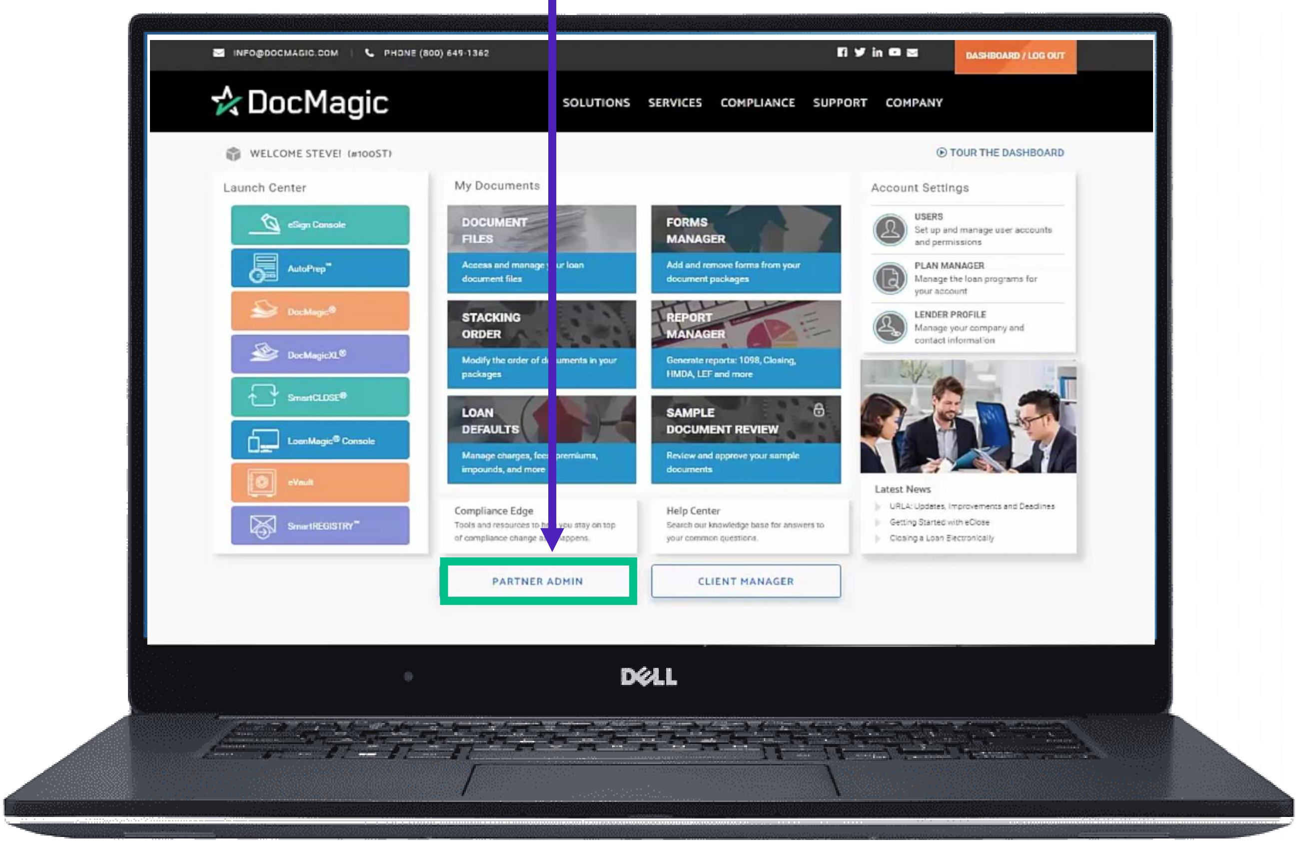


Click “LOG IN”

Partner Admin

Navigating to Partner Admin

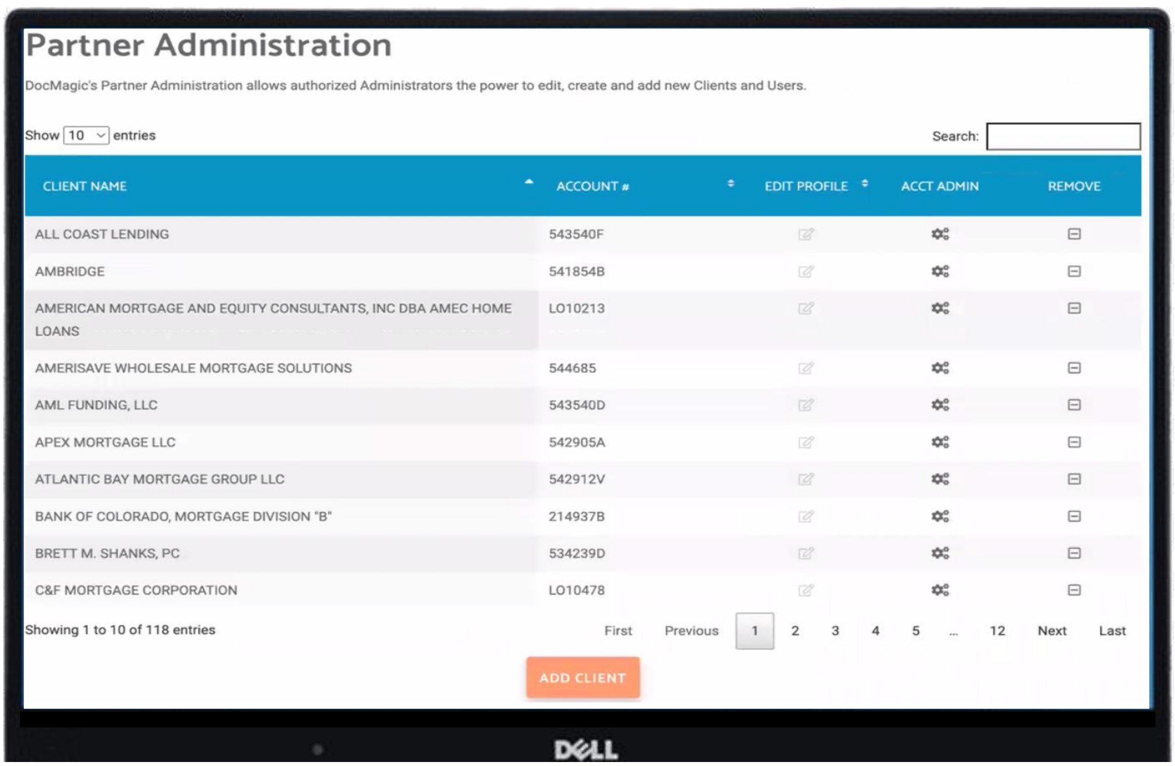
Partner Admin can be found towards the bottom of your screen.



Partner Admin

Partner Administration

DocMagic's Partner Administration allows authorized Administrators the power to edit, create, and add new clients and users.



Partner Administration

DocMagic's Partner Administration allows authorized Administrators the power to edit, create and add new Clients and Users.

Show 10 entries

Search:

CLIENT NAME	ACCOUNT #	EDIT PROFILE	ACCT ADMIN	REMOVE
ALL COAST LENDING	543540F			
AMBRIDGE	541854B			
AMERICAN MORTGAGE AND EQUITY CONSULTANTS, INC DBA AMEC HOME LOANS	LO10213			
AMERISAVE WHOLESALE MORTGAGE SOLUTIONS	544685			
AML FUNDING, LLC	543540D			
APEX MORTGAGE LLC	542905A			
ATLANTIC BAY MORTGAGE GROUP LLC	542912V			
BANK OF COLORADO, MORTGAGE DIVISION "B"	214937B			
BRETT M. SHANKS, PC	534239D			
C&F MORTGAGE CORPORATION	LO10478			

Showing 1 to 10 of 118 entries

First Previous 1 2 3 4 5 ... 12 Next Last

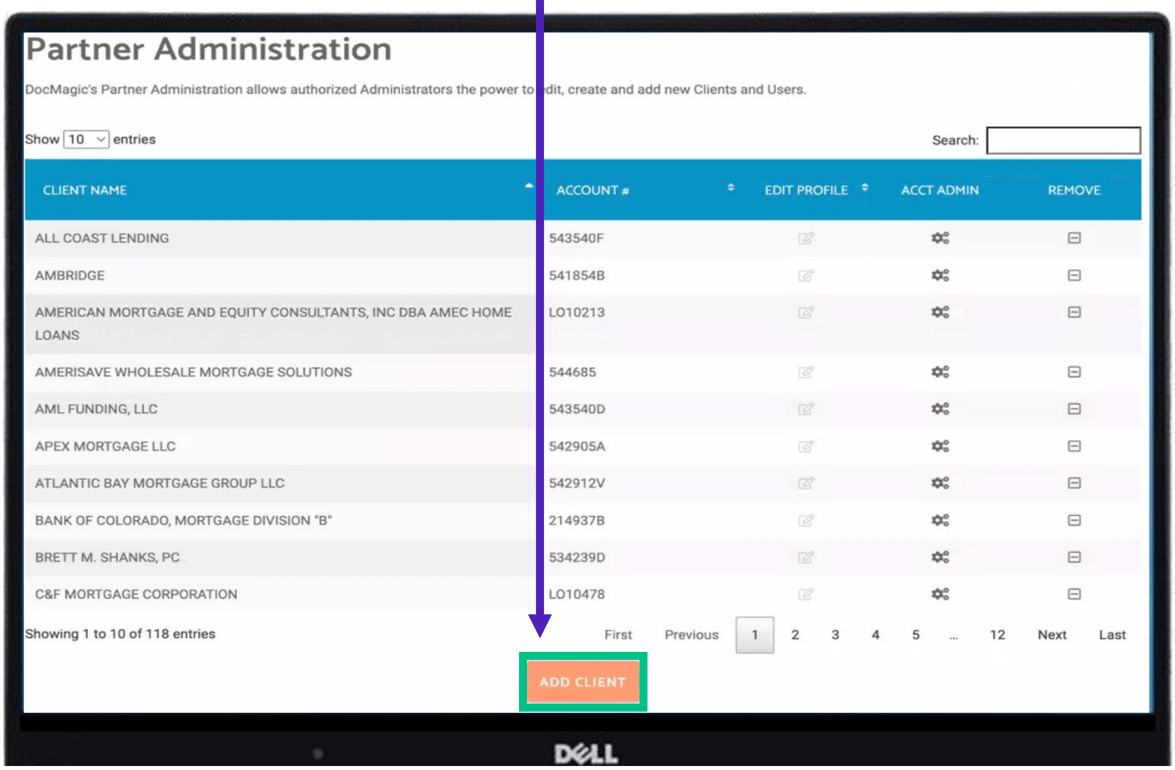
ADD CLIENT

Through this portal, partners are provided the ability to create new and manage client accounts while leveraging their existing business processes.

Partner Admin

Add Client

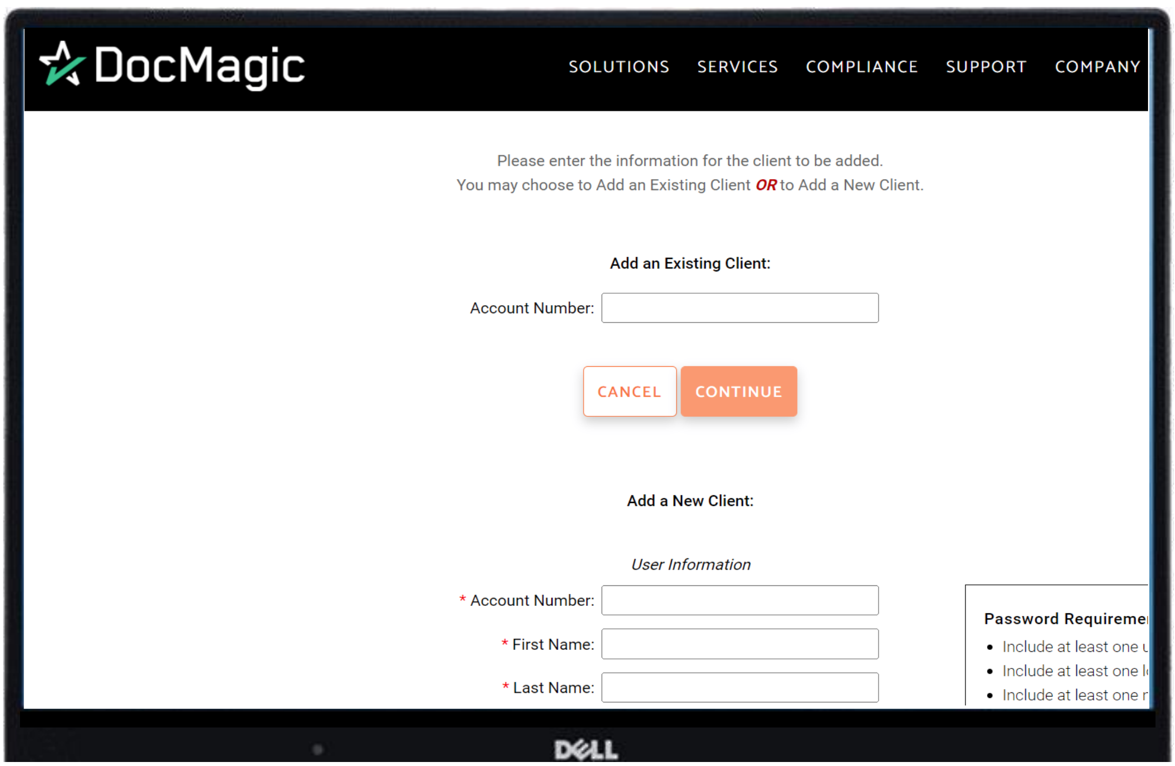
To add a new client, start by clicking here.



Partner Admin

Add Client

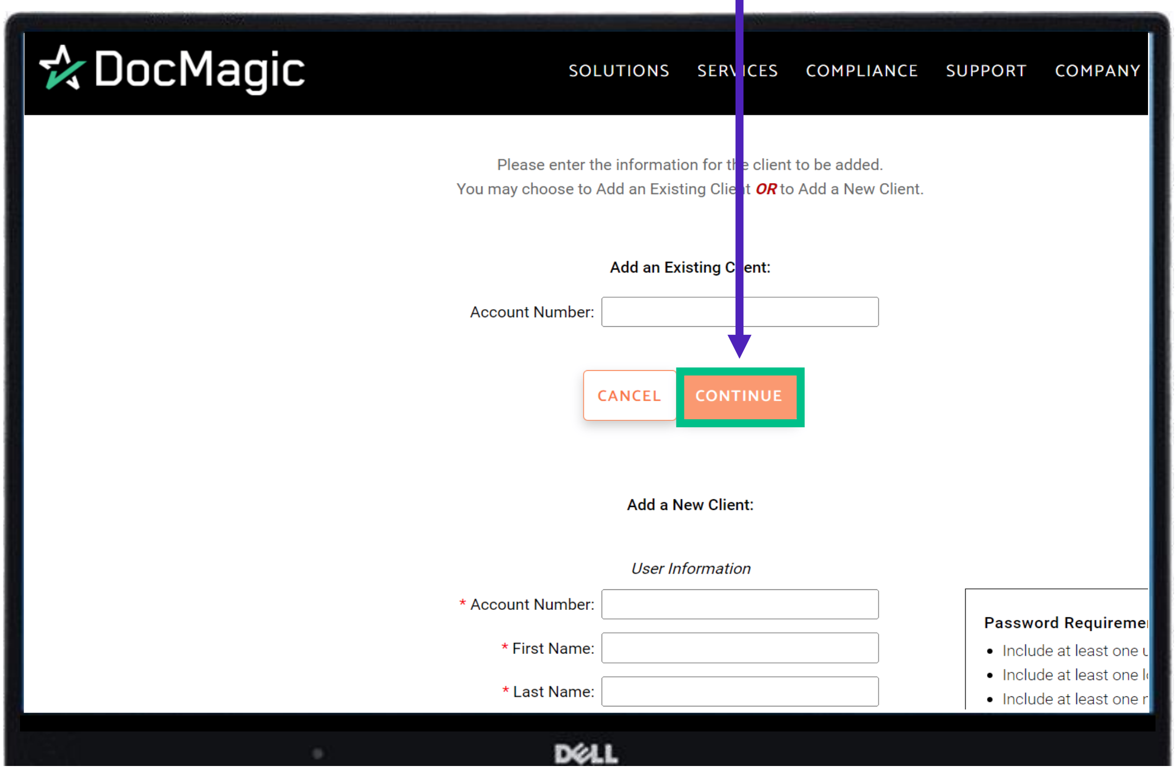
Two methods are available for adding client accounts – Add an Existing Client and Add a New Client.



Partner Admin

Add Existing Client

To add an existing client, enter the Client's DocMagic Client Number and click Continue.

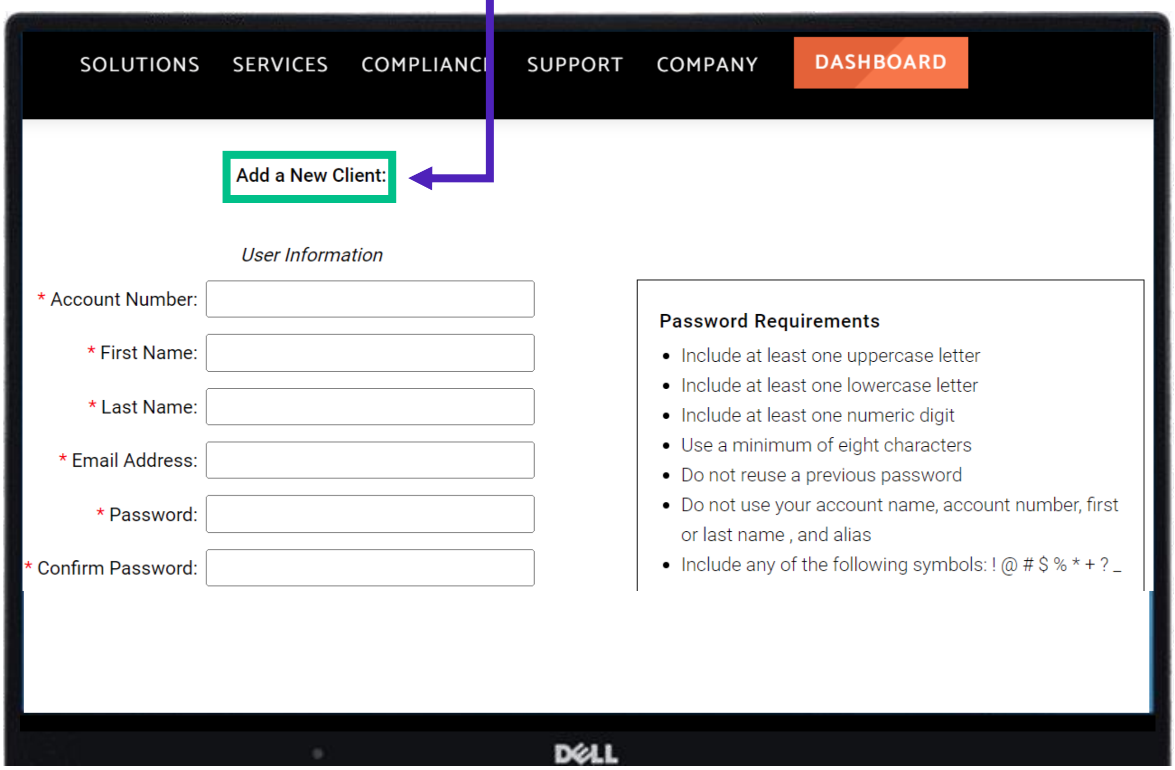


You will be prompted to confirm the Client's Information. If the information is correct. Click Continue again to have the account added to the Partner Administration system.

Partner Admin

Add New Client

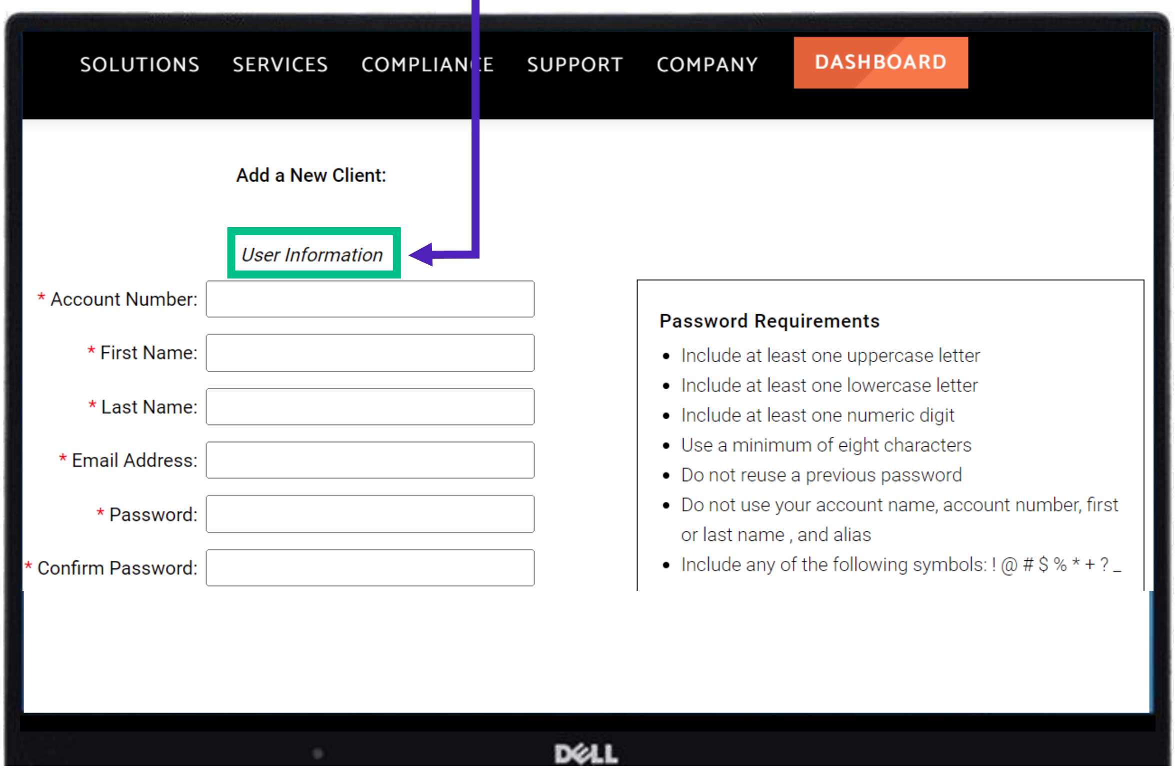
The Add a New Client feature is used to establish new DocMagic Accounts.



Partner Admin

Add New Client – User Information

The data entered in User Information is used to create the initial user account. The first user is always granted Administrator privileges for that Account.



If the Partner Account has been configured to allow Client IDs to be entered, the Account Number field will appear.

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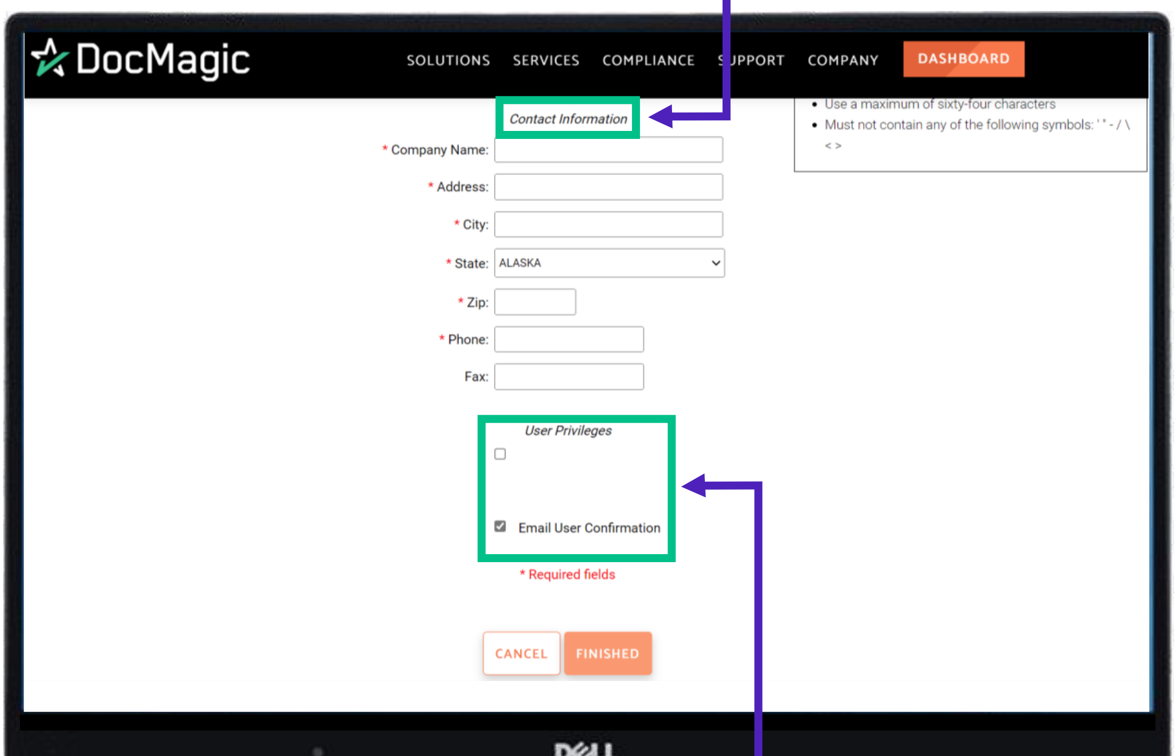
Add New Client – Contact Information

The Contact Information should be the main address for the Client Account.



User Privileges sets what DocMagic products the client is allowed to utilize. Email User Confirmation can be used to notify the client at the time their account is created.

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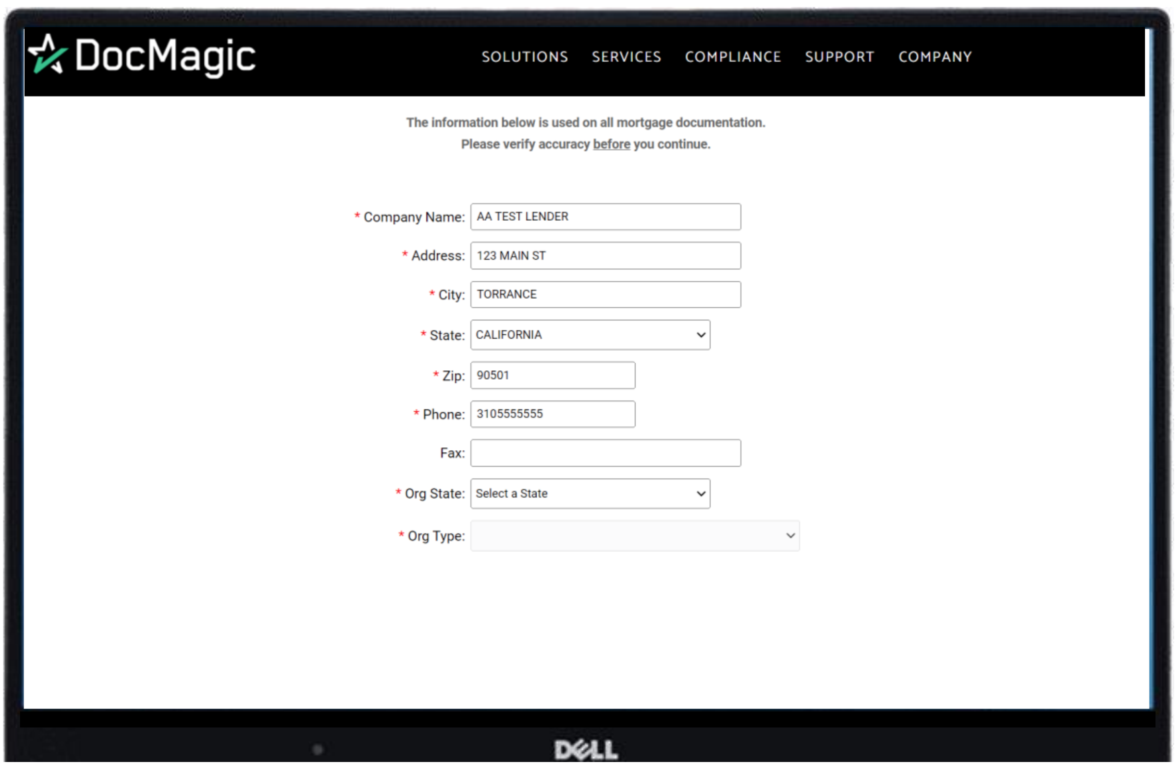
Add New Client – Lender Information

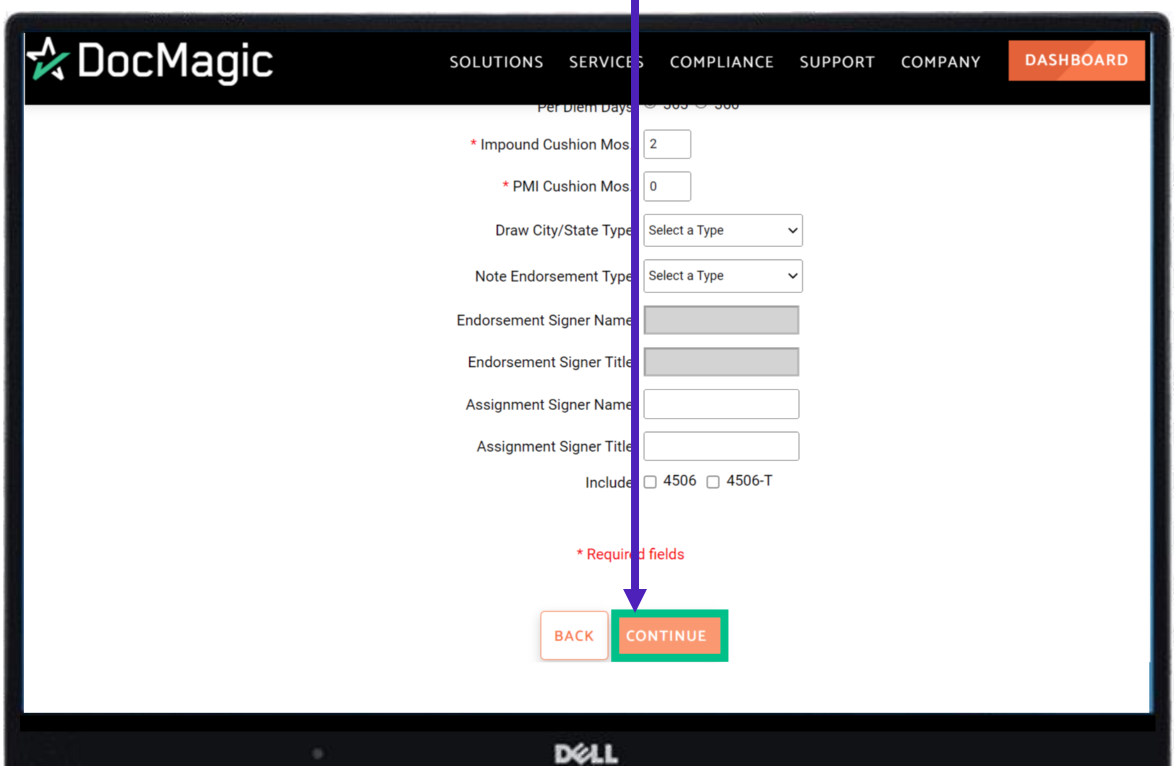
After clicking Continue to the initial Client Setup screen, the second part of the account creation process is to define the default lender information to be used on the documents.



Scroll down and enter the appropriate data in all sections - Beneficiary, Loss Payee, Make Payments To, When Recorded Mail To, Trustee, Licensing/Identification, Additional Licenses, Miscellaneous

Add New Client – Finish

Click "Continue" to complete the process.



You will be returned to the Partner Administration page.

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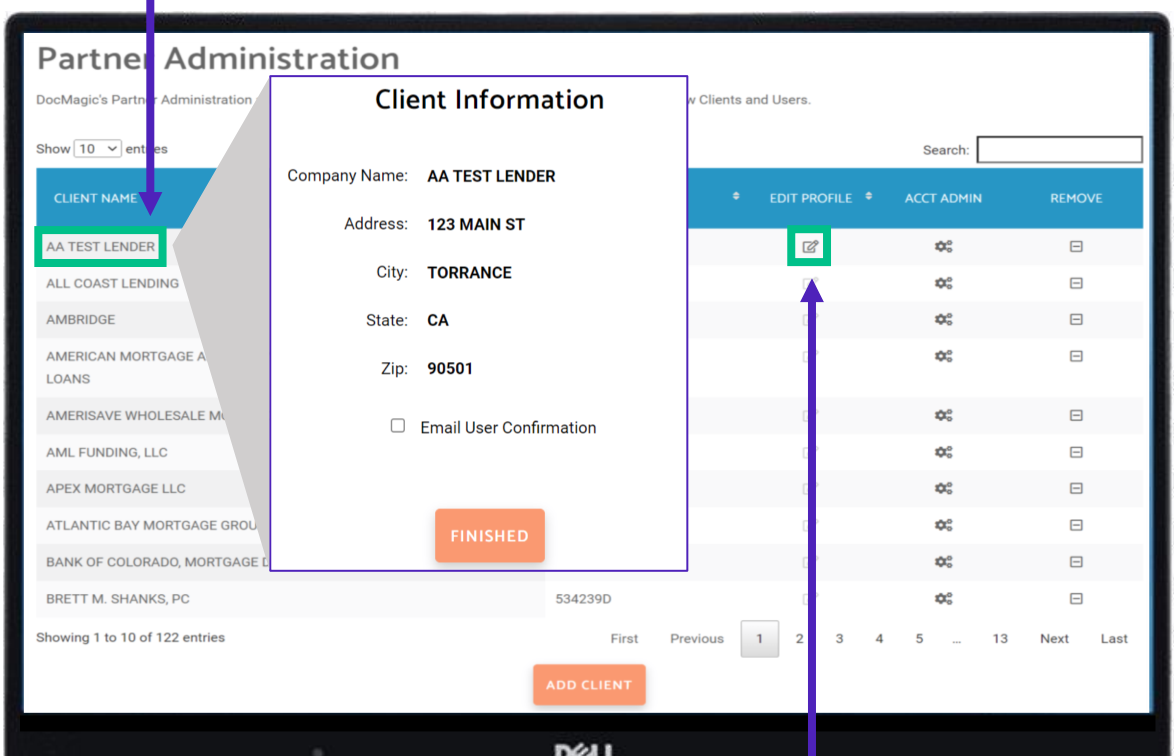
Partner Admin Functions

Click on the Client Name to view some of their basic information (opens in another page).

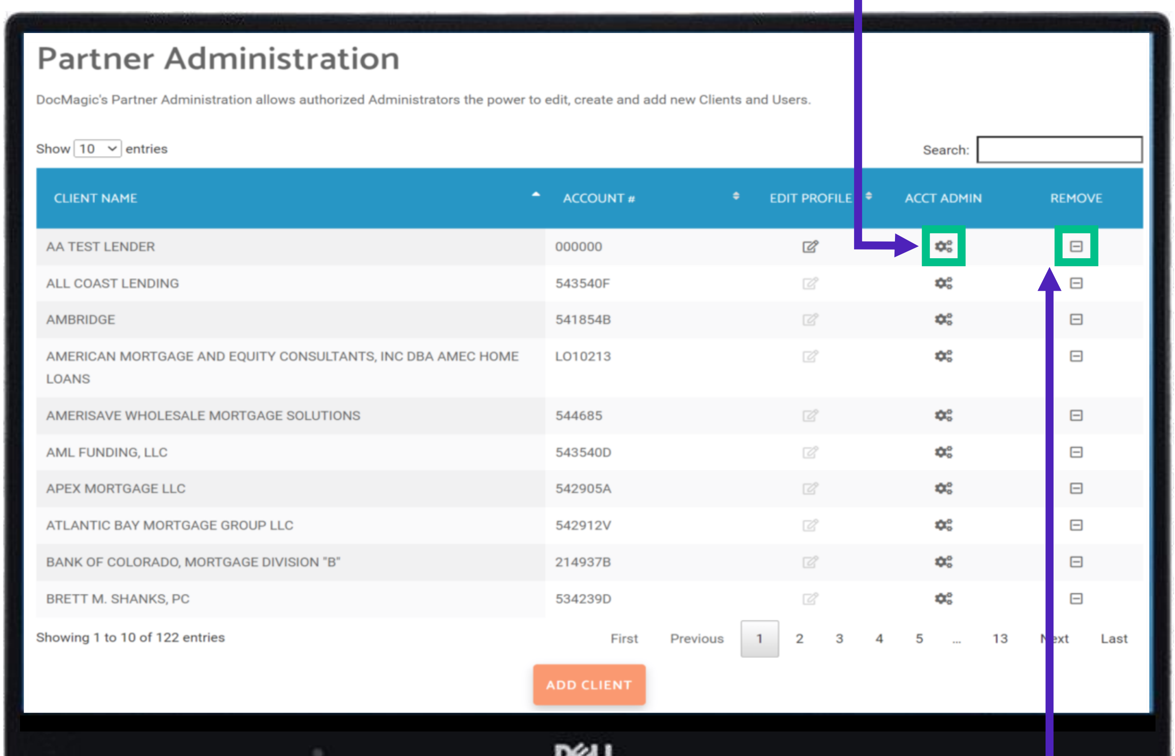


Click on the pencil icon to Edit the client's Profile Information.

Partner Admin

Partner Admin Functions

Click on the gear icon under Acct Admin to edit the Client's information (more on the next page).



Click here to remove the Client.

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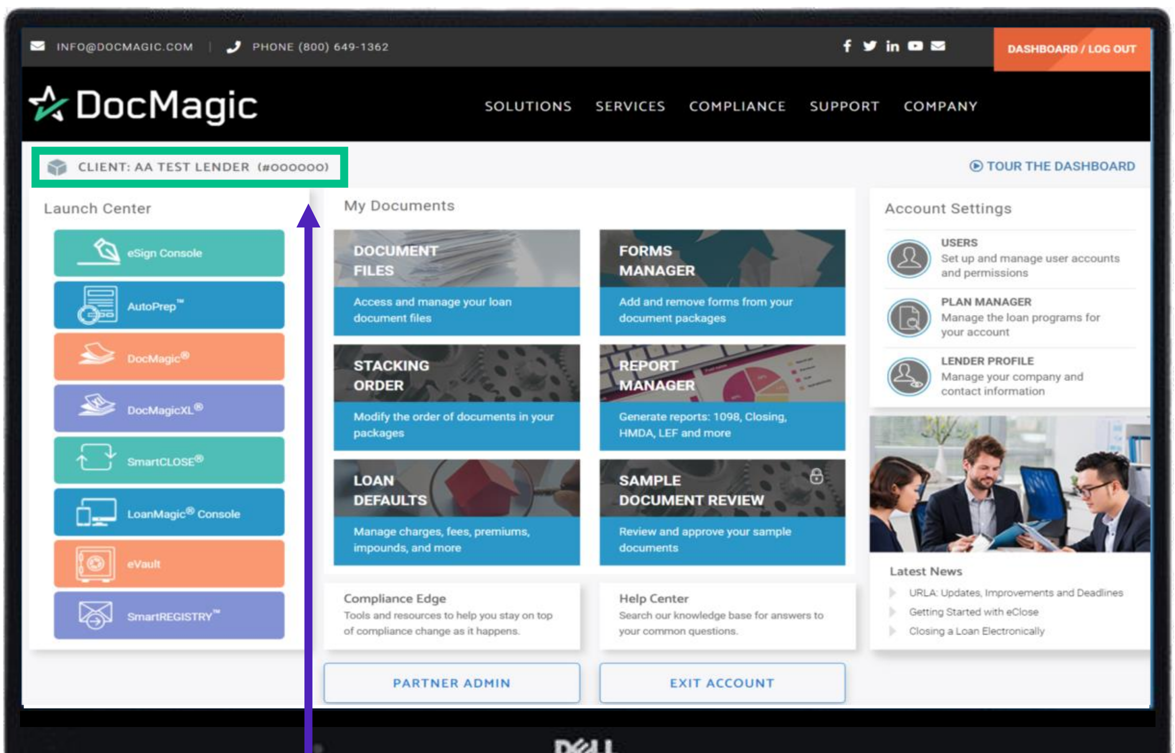
DocMagic.com

Clicking the gear icon under Acct Admin brings you to DocMagic's website.



The text here tells you that you are making changes to a client account on their behalf.

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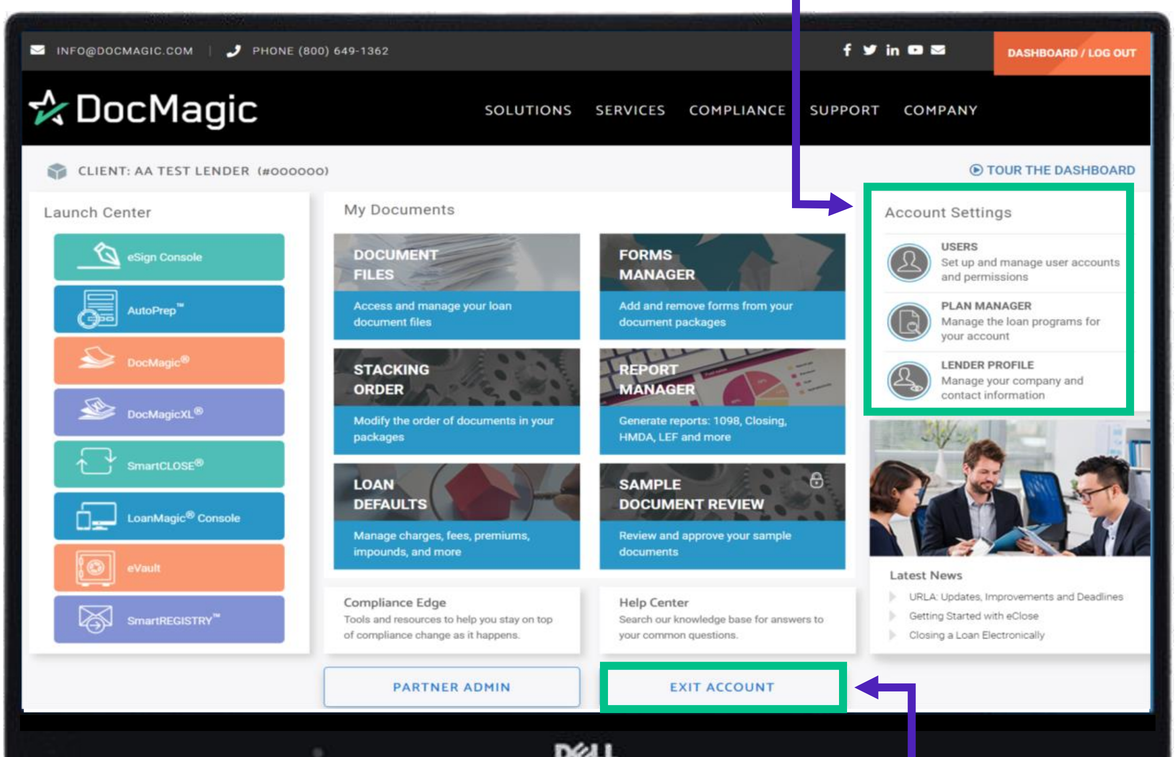
DocMagic.com

You can make changes to the clients' account settings here. For more help, please visit: https://www.docmagic.com/product-training/account-settings



Once you are done making changes to a client account, click here.