

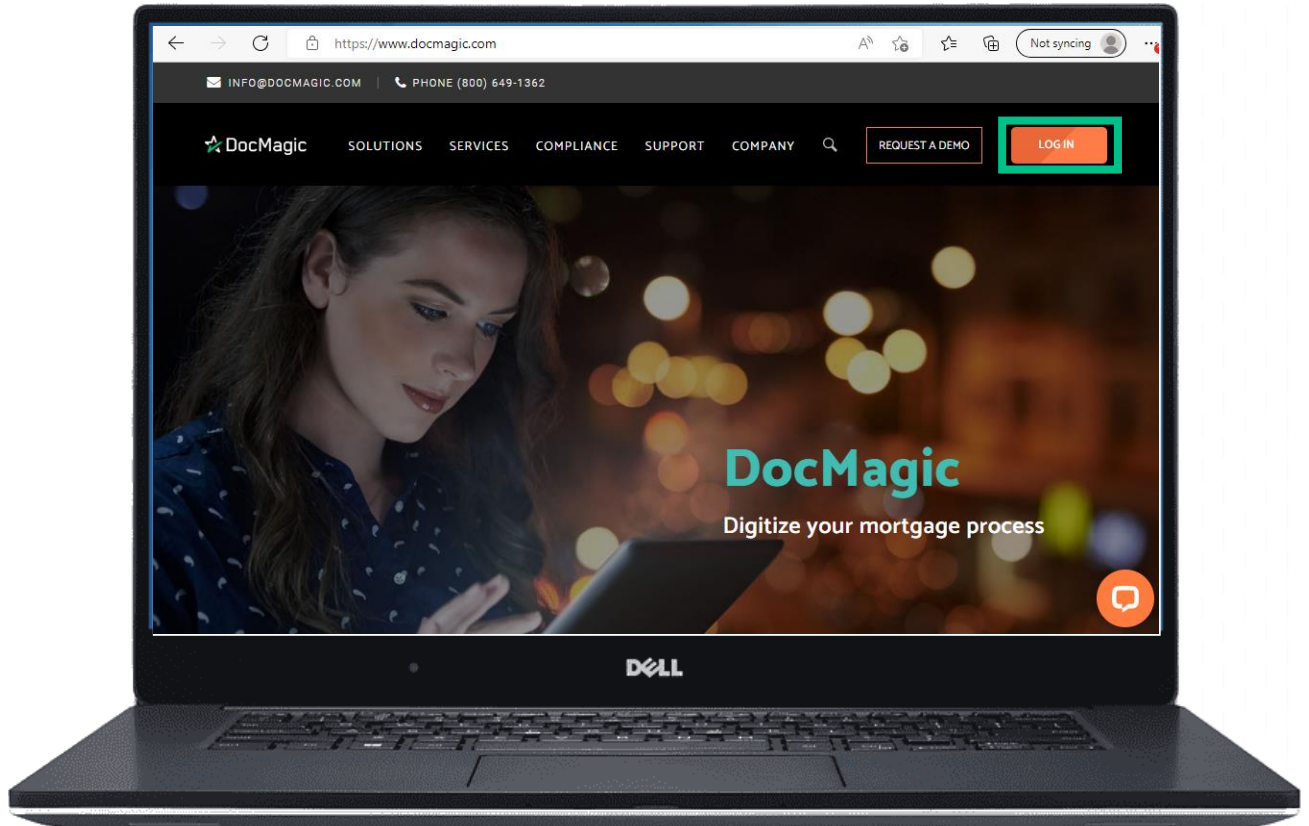


Partner Admin

Partner Admin

Navigating to Partner Admin

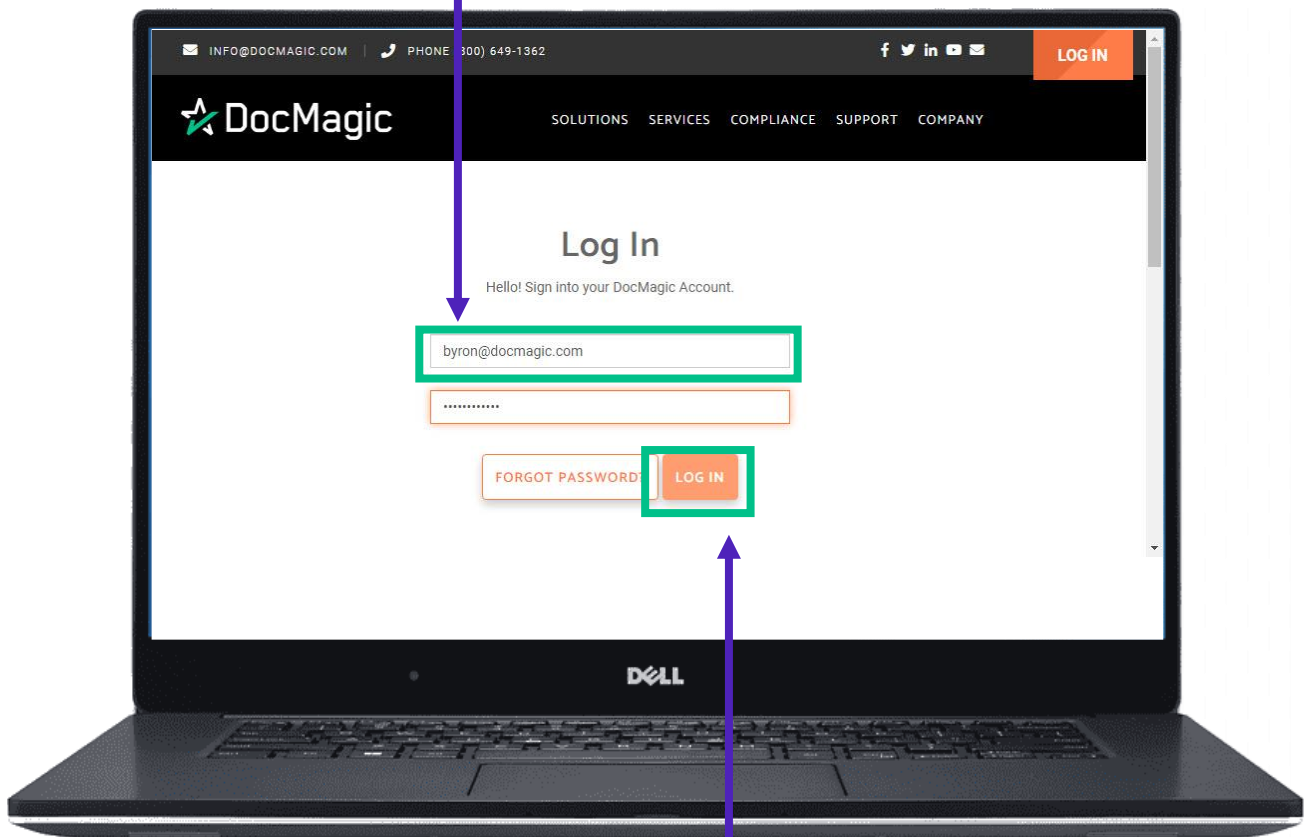
Go to www.docmagic.com



Partner Admin

Navigating to Partner Admin

Login with your
email and
password.



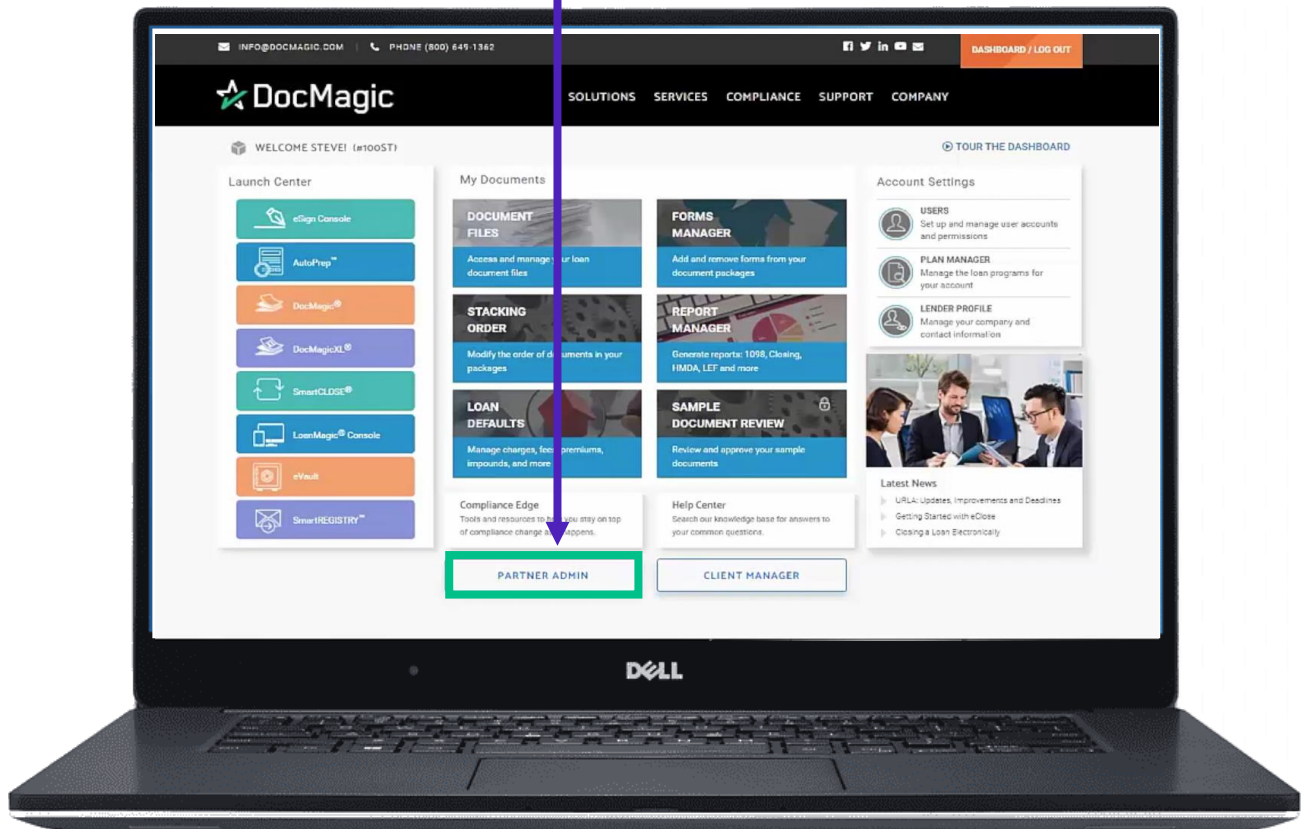
Click "LOG IN"



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 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](#)

DELL

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 Administration

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

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CLIENT NAME	ACCOUNT #	EDIT PROFILE	ACCT ADMIN	REMOVE
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Showing 1 to 10 of 118 entries First Previous **1** 2 3 4 5 ... 12 Next Last

ADD CLIENT

DELL



Partner Admin

Add Client

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

DocMagic SOLUTIONS SERVICES COMPLIANCE SUPPORT COMPANY

Please enter the information for the client to be added.
You may choose to Add an Existing Client **OR** to Add a New Client.

Add an Existing Client:

Account Number:

Add a New Client:

User Information

* Account Number:

* First Name:

* Last Name:

Password Requirement

- Include at least one U
- Include at least one l
- Include at least one r

DELL



Partner Admin

Add Existing Client

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

The screenshot shows the DocMagic Partner Admin interface. At the top, there is a navigation bar with the DocMagic logo and menu items: SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, and COMPANY. The main content area contains the following text: "Please enter the information for the client to be added. You may choose to Add an Existing Client **OR** to Add a New Client."

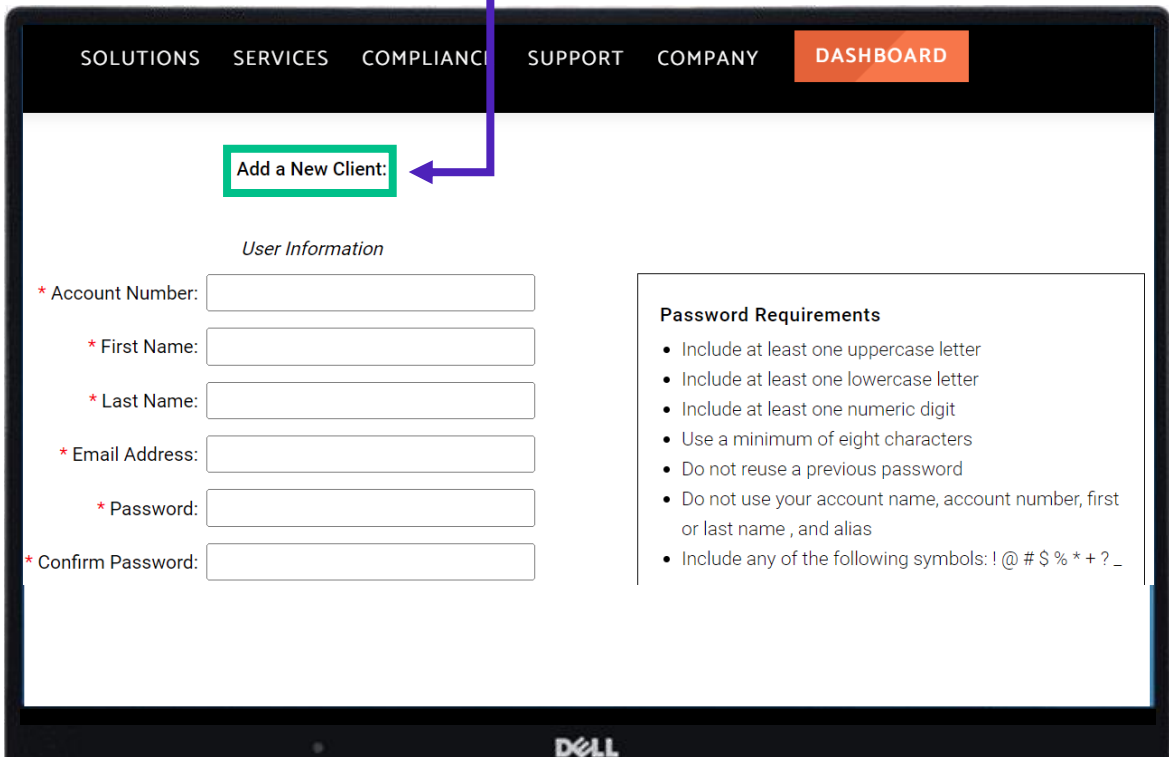
Under the heading "Add an Existing Client:", there is a text input field labeled "Account Number:". Below this field are two buttons: "CANCEL" and "CONTINUE". A blue arrow points from the instruction box above to the "CONTINUE" button.

Under the heading "Add a New Client:", there is a section titled "User Information" with three required text input fields: "* Account Number:", "* First Name:", and "* Last Name:". To the right of these fields is a "Password Requirement" section with three bullet points: "• Include at least one U", "• Include at least one l", and "• Include at least one r".

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.



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



The screenshot displays the Partner Admin dashboard with a navigation bar at the top containing 'SOLUTIONS', 'SERVICES', 'COMPLIANCE', 'SUPPORT', 'COMPANY', and 'DASHBOARD'. The 'DASHBOARD' link is highlighted in orange. Below the navigation bar, the 'Add a New Client:' button is highlighted with a green box and a blue arrow pointing to it from the text box above. The form is titled 'User Information' and includes the following fields:

- * Account Number:
- * First Name:
- * Last Name:
- * Email Address:
- * Password:
- * Confirm Password:

To the right of the form, there is a section titled 'Password Requirements' with the following list of rules:

- Include at least one uppercase letter
- Include at least one lowercase letter
- Include at least one numeric digit
- Use a minimum of eight characters
- Do not reuse a previous password
- Do not use your account name, account number, first or last name, and alias
- Include any of the following symbols: ! @ # \$ % * + ? _

The Dell logo is visible at the bottom center of the dashboard.



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.

ADD A NEW CLIENT

SOLUTIONS SERVICES COMPLIANCE SUPPORT COMPANY **DASHBOARD**

Add a New Client:

User Information

* Account Number:

* First Name:

* Last Name:

* Email Address:

* Password:

* Confirm Password:

Password Requirements

- Include at least one uppercase letter
- Include at least one lowercase letter
- Include at least one numeric digit
- Use a minimum of eight characters
- Do not reuse a previous password
- Do not use your account name, account number, first or last name, and alias
- Include any of the following symbols: ! @ # \$ % * + ? _

DELL

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



Partner Admin

Add New Client – Contact Information

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

DocMagic SOLUTIONS SERVICES COMPLIANCE SUPPORT COMPANY DASHBOARD

Contact Information

* Company Name:

* Address:

* City:

* State: ALASKA

* Zip:

* Phone:

Fax:

User Privileges

Email User Confirmation

* Required fields

CANCEL FINISHED

- Use a maximum of sixty-four characters
- Must not contain any of the following symbols: * - / \ < >

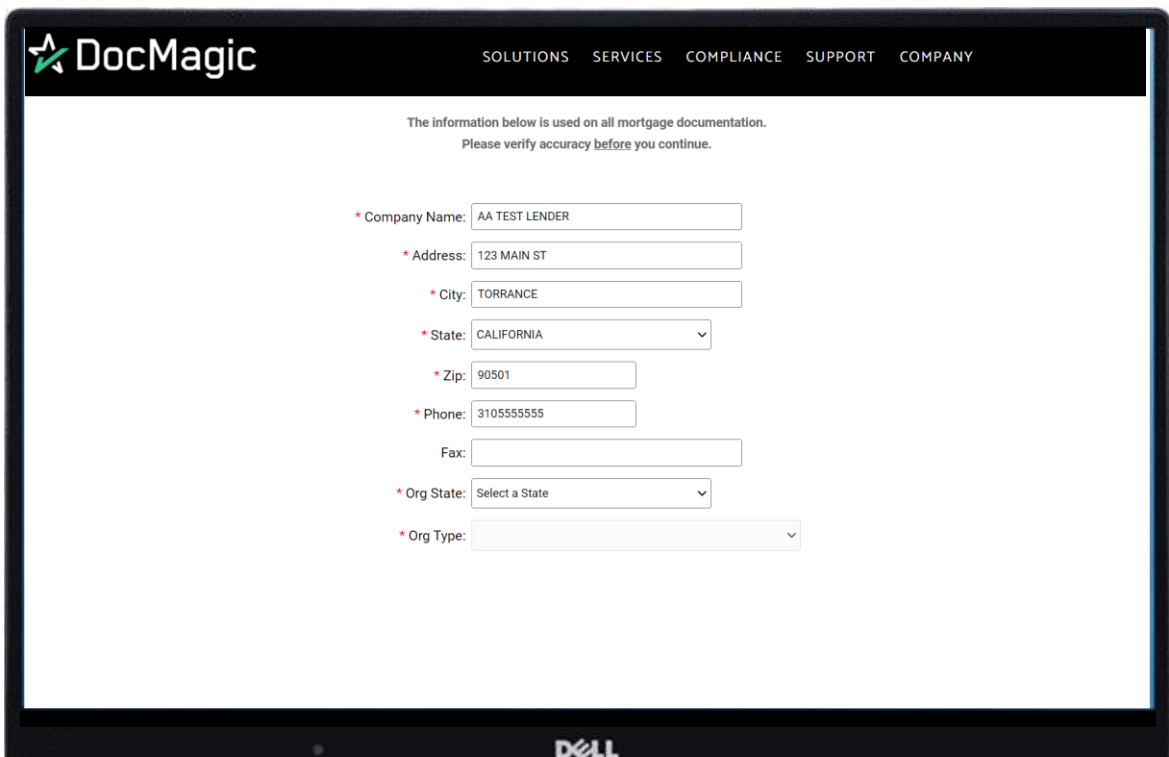
User Privileges sets what DocMagic products the client is allowed to utilize. Email User Confirmation can be used to notify the client at the time their account is created.



Partner Admin

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.



The screenshot displays the DocMagic Partner Admin interface. At the top left is the DocMagic logo. To the right are navigation links: SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, and COMPANY. Below the navigation is a warning message: "The information below is used on all mortgage documentation. Please verify accuracy before you continue." The form contains the following fields:

- * Company Name: AA TEST LENDER
- * Address: 123 MAIN ST
- * City: TORRANCE
- * State: CALIFORNIA (dropdown menu)
- * Zip: 90501
- * Phone: 3105555555
- Fax: (empty field)
- * Org State: Select a State (dropdown menu)
- * Org Type: (dropdown menu)

The Dell logo is visible at the bottom center of the screen.

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



Partner Admin

Add New Client – Finish

Click "Continue" to complete the process.

DocMagic SOLUTIONS SERVICES COMPLIANCE SUPPORT COMPANY DASHBOARD

Per Diem Days 300 300

* Impound Cushion Mos

* PMI Cushion Mos

Draw City/State Type

Note Endorsement Type

Endorsement Signer Name

Endorsement Signer Title

Assignment Signer Name

Assignment Signer Title

Include 4506 4506-T

* Required fields

BACK CONTINUE

You will be returned to the Partner Administration page.



Partner Admin

Partner Admin Functions

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

The screenshot displays the 'Partner Administration' interface. On the left, a table lists client names. The first entry, 'AA TEST LENDER', is highlighted with a green box. A purple arrow points from this box to a modal window titled 'Client Information'. The modal displays the following details for 'AA TEST LENDER':

- Company Name: AA TEST LENDER
- Address: 123 MAIN ST
- City: TORRANCE
- State: CA
- Zip: 90501
- Email User Confirmation

At the bottom of the modal is an orange 'FINISHED' button. In the background, a table of clients is visible. The first row of this table has a pencil icon in the 'EDIT PROFILE' column, which is also highlighted with a green box. A purple arrow points from this icon to a text box at the bottom of the image.

Other interface elements include a search bar, a 'Show 10 entries' dropdown, and a pagination bar at the bottom of the client list.

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).

Partner Administration
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Show entries Search:

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BRETT M. SHANKS, PC	534239D			

Showing 1 to 10 of 122 entries First Previous **1** 2 3 4 5 ... 13 Next Last

[ADD CLIENT](#)

Click here to remove the Client.



Partner Admin

DocMagic.com

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

INFO@DOCMAGIC.COM | PHONE (800) 649-1362

f t in v

DASHBOARD / LOG OUT

DocMagic

SOLUTIONS SERVICES COMPLIANCE SUPPORT COMPANY

CLIENT: AA TEST LENDER (#000000)

TOUR THE DASHBOARD

Launch Center

- eSign Console
- AutoPrep™
- DocMagic®
- DocMagicXL®
- SmartCLOSE®
- LoanMagic® Console
- eVault
- SmartREGISTRY™

My Documents

- DOCUMENT FILES: Access and manage your loan document files
- FORMS MANAGER: Add and remove forms from your document packages
- STACKING ORDER: Modify the order of documents in your packages
- REPORT MANAGER: Generate reports: 1098, Closing, HMDA, LEF and more
- LOAN DEFAULTS: Manage charges, fees, premiums, impounds, and more
- SAMPLE DOCUMENT REVIEW: Review and approve your sample documents

Account Settings

- USERS: Set up and manage user accounts and permissions
- PLAN MANAGER: Manage the loan programs for your account
- LENDER PROFILE: Manage your company and contact information

Compliance Edge: Tools and resources to help you stay on top of compliance change as it happens.

Help Center: Search our knowledge base for answers to your common questions.

PARTNER ADMIN

EXIT ACCOUNT

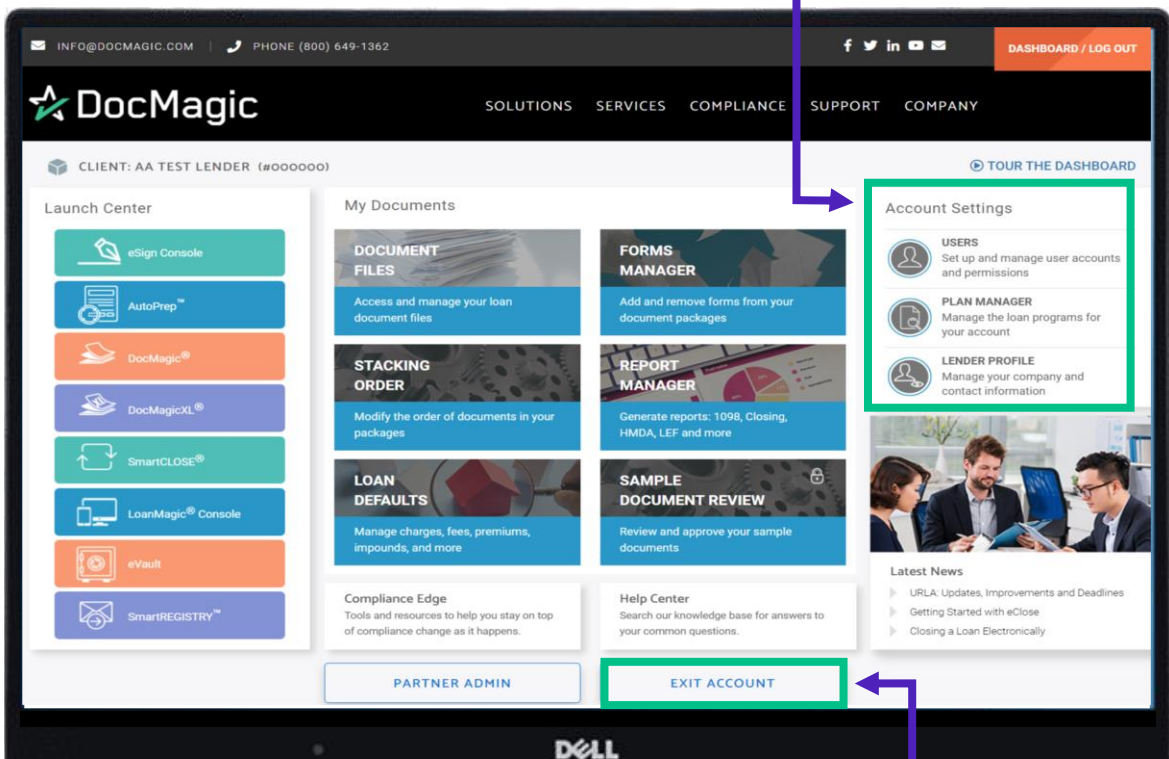
The text here tells you that you are making changes to a client account on their behalf.



Partner Admin

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.

