

Plan Manager

Set-Up and Administration

Plan Manager

The screenshot displays the DocMagic dashboard interface. At the top, there is a navigation bar with the DocMagic logo, contact information (INFO@DOCMAGIC.COM and PHONE (800) 649-1362), and menu items: SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, and COMPANY. There are also buttons for 'REQUEST A DEMO' and 'DASHBOARD / LOG OUT'. Below the navigation bar, the user is greeted with 'WELCOME ANDREA! (#100SALES)' and a 'TOUR THE DASHBOARD' link. The main content area is divided into three columns. The left column, 'Launch Center', contains buttons for eSign Console, AutoPrep™, DocMagic®, DocMagicXL®, SmartCLOSE®, LoanMagic® Console, eVault, and SmartREGISTRY™. The middle column, 'My Documents', features tiles for DOCUMENT FILES, FORM ANALYZER, STACKING ORDER, REPORT MANAGER, LOAN DEFAULTS, and SAMPLE DOCUMENT REVIEW. The right column, 'Account Settings', includes sections for USERS, PLAN MANAGER (highlighted with a purple border), and LENDER PROFILE. Below these is a 'Latest News' section with three items: 'URLA: Updates, Improvements and Deadlines', 'Getting Started with eClose', and 'Closing a Loan Electronically'.

- The Plan Manager can be accessed from the Accounts Settings on the DocMagic Dashboard.

Plan Manager

Plan Manager

DocMagic's Plan Manager allows authorized Administrators the ability to add and remove plans as needed.

Show 10 entries

Search:

CODE	DESCRIPTION	SORT	REMOVE
1MB_BA30	30 YEAR FIXED BORROWER ADVANTAGE - 1ST MARINER		
1MB_BA51	5 YR FIX/1 YR LIB BORROWER ADVANTAGE - 1ST MARINER		
ADM_CONV	ALL FIXED LOANS - A&D MORTGAGE		
BK2_18415FS	FEE SIMPLE 15 YEARS - CHICKASAW COMMUNITY BANK		
CFL_CA6F10	CONVENTIONAL TEXAS 50(a)(6) 8-10YR FIXED - NEWREZ WHOLESAL		
CFL_CA6F15	CONVENTIONAL TEXAS 50(a)(6) 11-15YR FIXED - NEWREZ WHOLESAL		
CFL_CA6F20	CONVENTIONAL TEXAS 50(a)(6) 16-20YR FIXED - NEWREZ WHOLESAL		
CFL_CA6F30	CONVENTIONAL TEXAS 50(a)(6) 21-30YR FIXED - NEWREZ WHOLESAL		
CFL_CF10	CONVENTIONAL CONFORMING 10YR FIXED AMORTIZATION - NEWREZ WHOLESAL		
CFL_CF15	CONVENTIONAL CONFORMING 11-15YR FIXED AMORTIZATION - NEWREZ WHOLESAL		

Showing 1 to 10 of 90 entries

First Previous 1 2 3 4 5 ... 9 Next Last

ADD A PLAN

FINISHED

- If you already have loan programs in your account, you can sort them by plan code or description by clicking on either. By default, the list will be sorted by code.
- The “Search” bar on this page will filter existing loan programs that are already in your account – it does not search the entire DocMagic plan code inventory.
- Click the icon under “REMOVE” to eliminate the loan program from your account.
- To view more plans per page, adjust the “Show entries” dropdown.
- Click “ADD A PLAN” at the bottom to begin the process of adding a loan program to your account.

Plan Manager – Add a Plan

Select the Investor whose plans you would like to view below.

Show entries Search:

CODE	INVESTOR
1MB	1ST MARINER BANK
5THST	5TH STREET CAPITAL, INC.
AAH	ALL AMERICAN HOME MORTGAGE CORP
AAMES	AAMES HOME LOAN
ABB	ARIZONA BUSINESS BANK
ABM	ACCUBANC MORTGAGE CORPORATION
ABR	ARBOR RESIDENTIAL MORTGAGE, LLC
ACC	ACC MORTGAGE INC
ACRA	CITADEL SERVICING CORPORATION DBA ACRA LENDING
ADM	A&D MORTGAGE LLC

Showing 1 to 10 of 323 entries

First Previous 2 3 4 5 ... 33 Next Last

- You'll start with the list of investors. Click on an investor or their code to view their inventory of plans.
- You can search for an investor by their code or name towards the top right. Search "DSI" to view our list of our generic loan programs that are not investor specific.
- [Customer Service](#) can create investors and loan programs via a service request.

Plan Manager – Add a Plan

Select the plan that is to be added.

Show entries Search:

CODE	DESCRIPTION	ADD
1MB_BA15	15 YEAR FIXED BORROWER ADVANTAGE - 1ST MARINER	<input type="checkbox"/>
1MB_BA30	30 YEAR FIXED BORROWER ADVANTAGE - 1ST MARINER	Exists
1MB_BA30IO	30 YR I/O 5 YEAR BORROWER ADVANTAGE - 1ST MARINER	<input type="checkbox"/>
1MB_BA30IO2	30 YR I/O 10 YEAR BORROWER ADVANTAGE - 1ST MARINE	<input type="checkbox"/>
1MB_BA51	5 YR FIX/1 YR LIB BORROWER ADVANTAGE - 1ST MARINER	Exists
1MB_BA56	5 YR FIX/6MO LIB BORROWER ADVANTAGE - 1ST MARINER	<input type="checkbox"/>
1MB_PBD30	30 YEAR FIXED PERMANENT BUYDOWN - 1ST MARINER	<input type="checkbox"/>
1MB_PBD51	5 YR FIX/1YR LIBOR PERMANENT BUYDOWN - 1ST MARINER	<input type="checkbox"/>
1MB_PBD56	5 YR FIX/6MO LIBOR PERMANENT BUYDOWN - 1ST MARINER	<input type="checkbox"/>

Showing 1 to 9 of 9 entries First Previous Next Last

- Once you select an investor, their inventory of available plans will load.
- “Exists” on the right column means that the loan program is already in your account. They can be removed through the Plan Manager screen shown on page 3.
- “Activate All” will add check marks to all the boxes. “Deactivate All” will remove check marks from all the boxes.
- Click “Add Plans” once you have chosen your loans, and all checked loan programs will be added to your account.

Plan Manager – Add a Plan

Plan Manager

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Show entries

Search:

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Showing 1 to 10 of 90 entries

First Previous **1** 2 3 4 5 ... 9 Next Last

ADD A PLAN

FINISHED

- Click "Finished" to confirm your changes. This will bring you back to the dashboard.

Plan Manager

The screenshot shows the DocMagic dashboard for user Andrea (#100SALES). The top navigation bar includes contact information (INFO@DOCMAGIC.COM, PHONE (800) 649-1362), the DocMagic logo, and menu items for SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, and COMPANY. There are buttons for 'REQUEST A DEMO' and 'DASHBOARD / LOG OUT'. The main content area is divided into several sections:

- Launch Center:** A vertical list of tool buttons including eSign Console, AutoPrep™, DocMagic®, DocMagicXL®, SmartCLOSE®, LoanMagic® Console, eVault, and SmartREGISTRY™.
- My Documents:** A grid of document management tools:
 - DOCUMENT FILES:** Access and manage your loan document files.
 - FORM ANALYZER:** Access our extensive forms library for document management.
 - STACKING ORDER:** Modify the order of documents in your packages.
 - REPORT MANAGER:** Generate reports: 1098, Closing, HMDA, and more.
 - LOAN DEFAULTS:** Manage charges, fees, premiums, impounds, and more.
 - SAMPLE DOCUMENT REVIEW:** Review and approve your sample documents.
- Account Settings:** A sidebar menu with options: USERS (Set up and manage user accounts and permissions), **PLAN MANAGER** (Manage the loan programs for your account - highlighted with a purple border), and 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.
- Latest News:** A list of updates including 'URLA: Updates, Improvements and Deadlines', 'Getting Started with eClose', and 'Closing a Loan Electronically'.

- Any changes to the loan programs will now appear in the Plan Manager page.
- Please remember to always click “Finished” until you are back in the Dashboard page. Your changes may not save otherwise.