

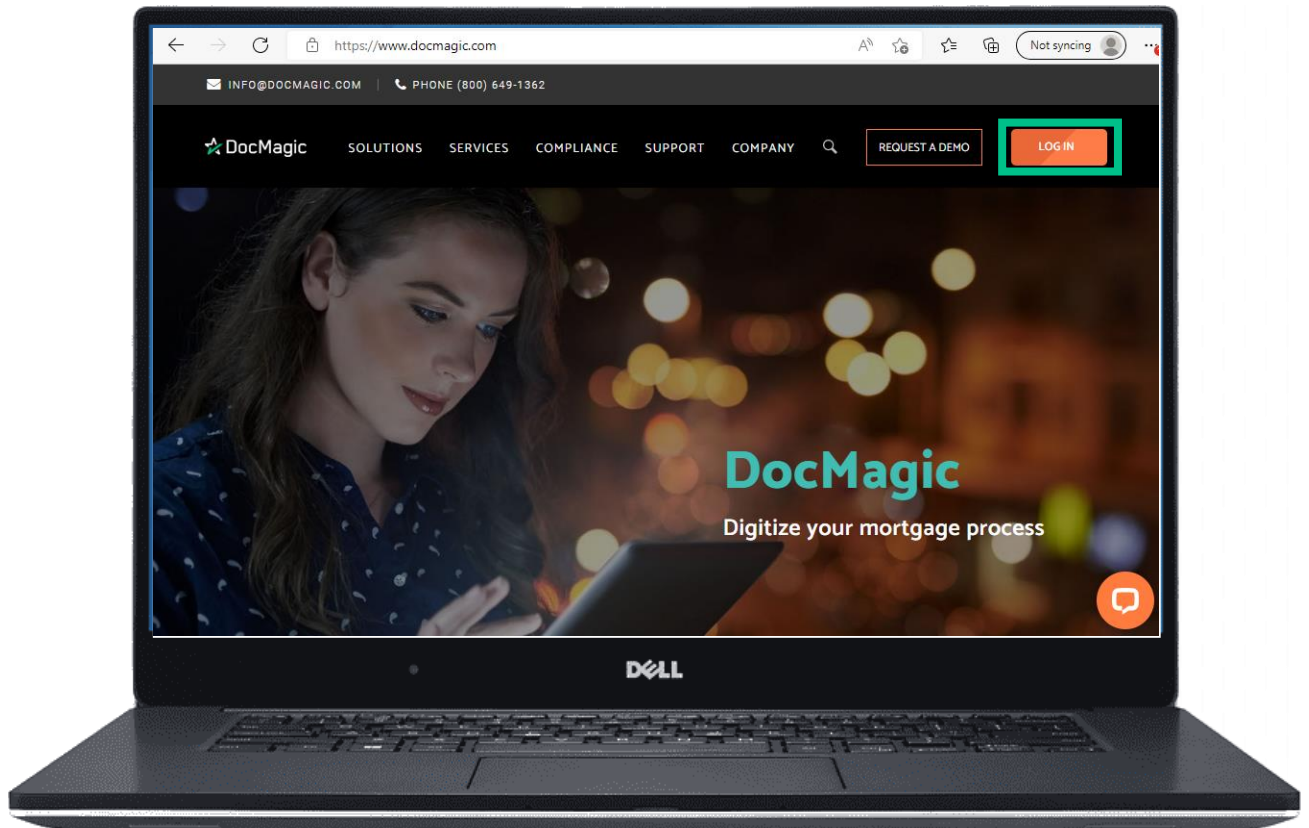


Plan Manager

LOGIN

Sign into your DocMagic Account

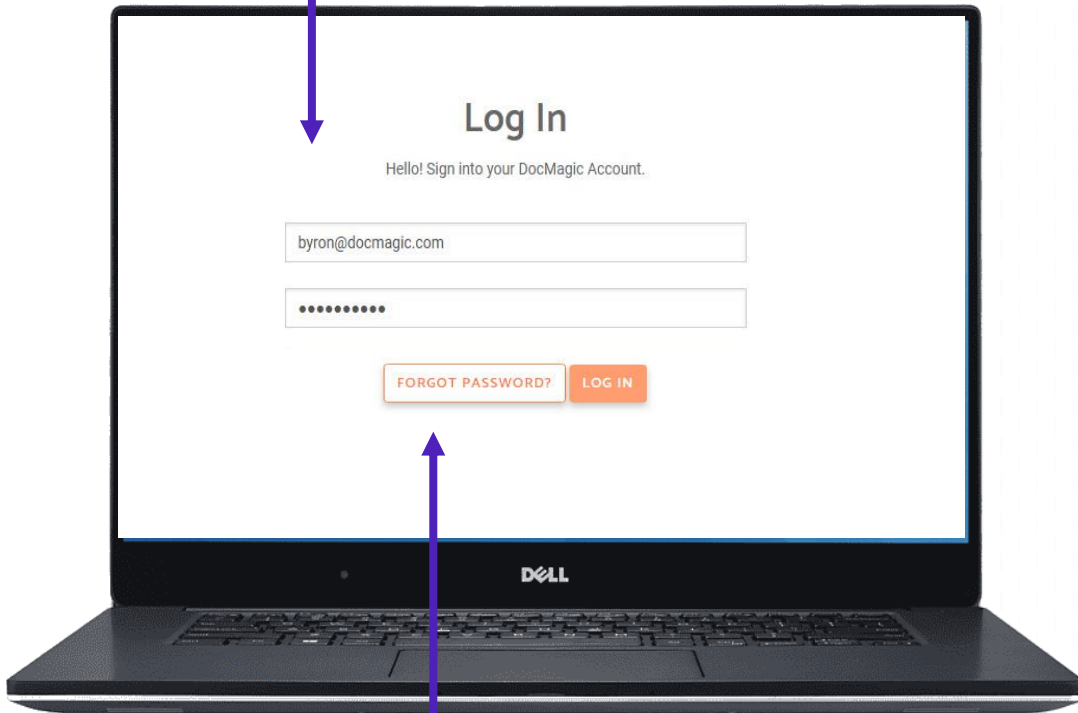
Go to www.docmagic.com



LOGIN

Sign Into Your DocMagic Account

Login with your email
and password.

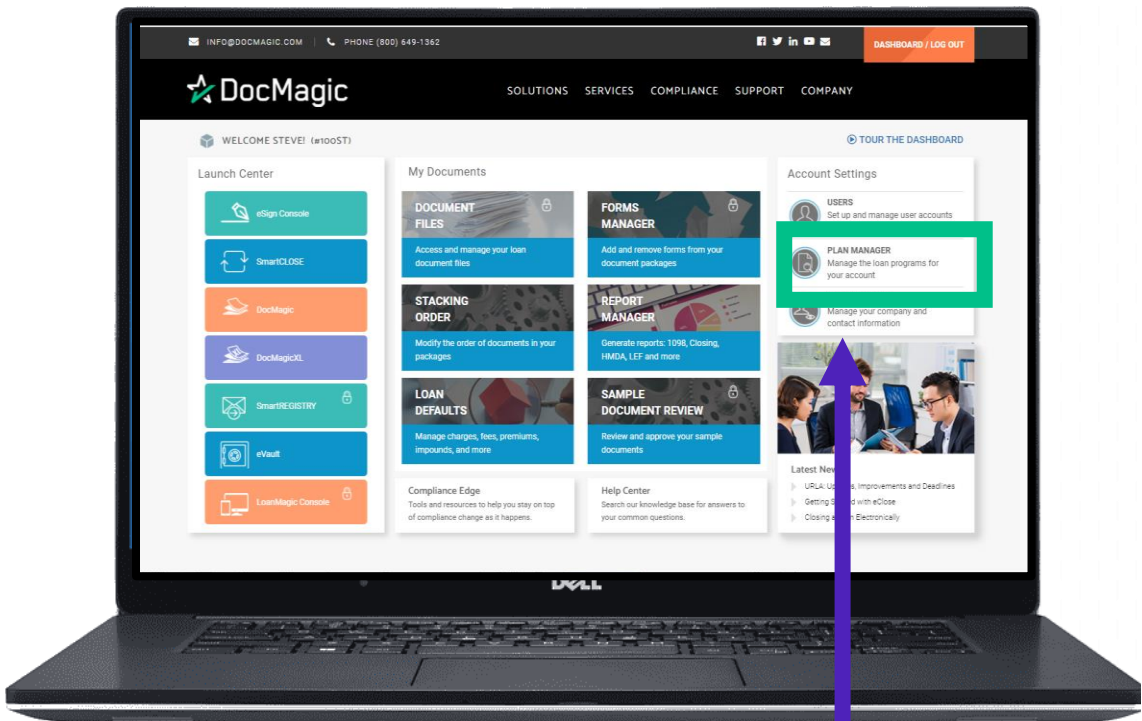


Click "Forgot password" to
reset if it does not work



Plan Manager

Plan Manager



Click on "Plan Manager"



Plan Manager

Plan Manager

If you already have Loan Programs in your account, you can sort by Code or Description or look them up using the search bar

Plan Manager

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

Show entries

Search:

CODE	DESCRIPTION	SORT	REMOVE
1MB_BA15	15 YEAR FIXED BORROWER ADVANTAGE - 1ST MARINER		
ADM_51DSCIO2	5/1 INVESTMENT PROPERTY - DEBT SERVICE COVERAGE 5YR INTEREST-ONLY - A&D MORTGAGE		
ADM_51IPIO	5/1 INVESTMENT PROPERTY - FULL ATR - 10YR INTEREST-ONLY - A&D MORTGAGE		
ADM_CONV	ALL FIXED LOANS - A&D MORTGAGE		
ASSIGN	GENERIC ASSIGNMENTS		
DSL_51YRT	5/1 1YR T-BILL ARM (2/2/6 CAPS) #659		
DSL_BW	BI-WEEKLY FIXED RATE		
DSL_CONV	ALL FIXED LOANS		
DSL_FHA	FHA FIXED RATE		
DSL_FHA51T	FHA 5/1 T-BILL ARM		

Showing 1 to 10 of 14 entries

First Previous 2 Next Last

DELL



Plan Manager

Plan Manager

Click here to remove the
Loan Program from your
account

Plan Manager

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

Show entries Search:

CODE	DESCRIPTION	+	SORT	REMOVE
1MB_BA15	15 YEAR FIXED BORROWER ADVANTAGE - 1ST MARINER	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ADM_51DSCIO2	5/1 INVESTMENT PROPERTY - DEBT SERVICE COVERAGE 5YR INTEREST-ONLY - A&D MORTGAGE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ADM_51IPIO	5/1 INVESTMENT PROPERTY - FULL ATR - 10YR INTEREST-ONLY - A&D MORTGAGE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ADM_CONV	ALL FIXED LOANS - A&D MORTGAGE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ASSIGN	GENERIC ASSIGNMENTS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DSL_51YRT	5/1 1YR T-BILL ARM (2/2/6 CAPS) #659	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DSL_BW	BI-WEEKLY FIXED RATE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DSL_CONV	ALL FIXED LOANS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DSL_FHA	FHA FIXED RATE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DSL_FHA51T	FHA 5/1 T-BILL ARM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Showing 1 to 10 of 14 entries First Previous 2 Next Last

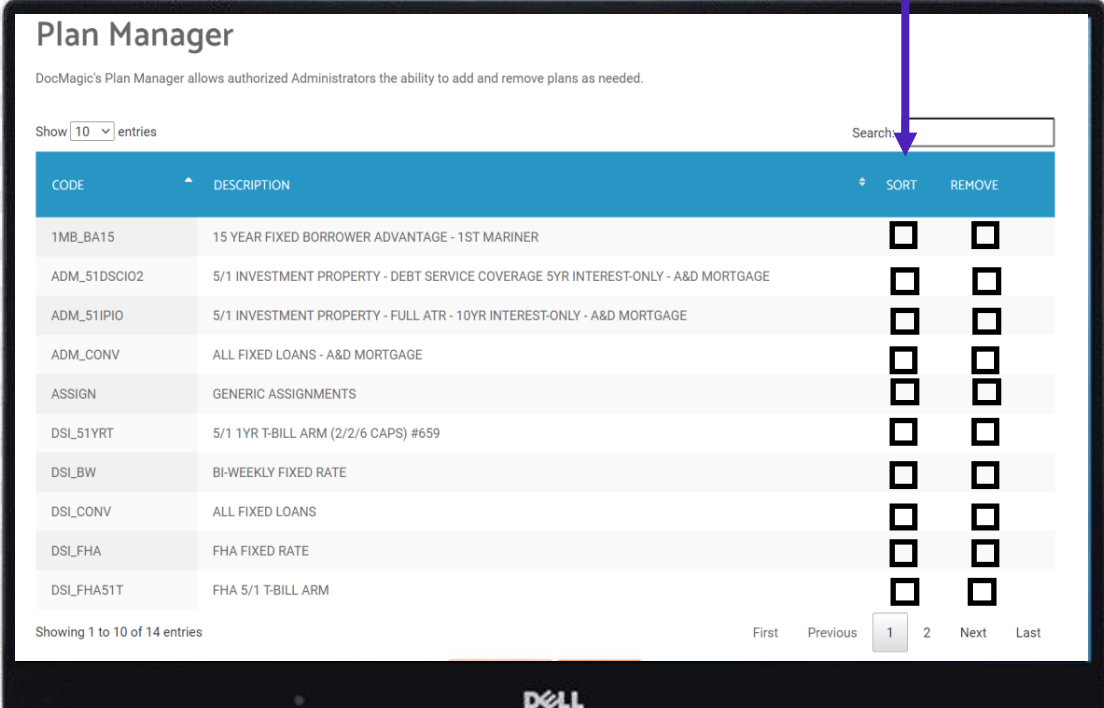
DELL



Plan Manager

Plan Manager

The "Sort" button will allow you to update the stacking order of the forms for the corresponding Loan Programs.



The screenshot displays the Plan Manager interface. At the top, it says "Plan Manager" and "DocMag's Plan Manager allows authorized Administrators the ability to add and remove plans as needed." Below this, there is a "Show 10 entries" dropdown and a search box. The main content is a table with columns for CODE, DESCRIPTION, SORT, and REMOVE. The table lists 14 entries, with the first 10 visible. The SORT column contains checkboxes, and the REMOVE column contains square icons. At the bottom, there are navigation buttons: First, Previous, 1, 2, Next, Last. The DELL logo is visible at the bottom center of the screen.

CODE	DESCRIPTION	SORT	REMOVE
1MB_BA15	15 YEAR FIXED BORROWER ADVANTAGE - 1ST MARINER	<input type="checkbox"/>	<input type="checkbox"/>
ADM_51DSCIO2	5/1 INVESTMENT PROPERTY - DEBT SERVICE COVERAGE 5YR INTEREST-ONLY - A&D MORTGAGE	<input type="checkbox"/>	<input type="checkbox"/>
ADM_51PIPO	5/1 INVESTMENT PROPERTY - FULL ATR - 10YR INTEREST-ONLY - A&D MORTGAGE	<input type="checkbox"/>	<input type="checkbox"/>
ADM_CONV	ALL FIXED LOANS - A&D MORTGAGE	<input type="checkbox"/>	<input type="checkbox"/>
ASSIGN	GENERIC ASSIGNMENTS	<input type="checkbox"/>	<input type="checkbox"/>
DSL_51YRT	5/1 1YR T-BILL ARM (2/2/6 CAPS) #659	<input type="checkbox"/>	<input type="checkbox"/>
DSL_BW	BI-WEEKLY FIXED RATE	<input type="checkbox"/>	<input type="checkbox"/>
DSL_CONV	ALL FIXED LOANS	<input type="checkbox"/>	<input type="checkbox"/>
DSL_FHA	FHA FIXED RATE	<input type="checkbox"/>	<input type="checkbox"/>
DSL_FHA51T	FHA 5/1 T-BILL ARM	<input type="checkbox"/>	<input type="checkbox"/>



Plan Manager

Plan Manager

The dropdown menu will allow you to see more investors per page

Plan Manager

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

Show **10** entries Search:

CODE	DESCRIPTION	SORT	REMOVE
1MB_BA15	15 YEAR FIXED BORROWER ADVANTAGE - 1ST MARINER	<input type="checkbox"/>	<input type="checkbox"/>
ADM_51DSCIO2	5/1 INVESTMENT PROPERTY - DEBT SERVICE COVERAGE 5YR INTEREST-ONLY - A&D MORTGAGE	<input type="checkbox"/>	<input type="checkbox"/>
ADM_51IPIO	5/1 INVESTMENT PROPERTY - FULL ATR - 10YR INTEREST-ONLY - A&D MORTGAGE	<input type="checkbox"/>	<input type="checkbox"/>
ADM_CONV	ALL FIXED LOANS - A&D MORTGAGE	<input type="checkbox"/>	<input type="checkbox"/>
ASSIGN	GENERIC ASSIGNMENTS	<input type="checkbox"/>	<input type="checkbox"/>
DSL_51YRT	5/1 1YR T-BILL ARM (2/2/6 CAPS) #659	<input type="checkbox"/>	<input type="checkbox"/>
DSL_BW	BI-WEEKLY FIXED RATE	<input type="checkbox"/>	<input type="checkbox"/>
DSL_CONV	ALL FIXED LOANS	<input type="checkbox"/>	<input type="checkbox"/>
DSL_FHA	FHA FIXED RATE	<input type="checkbox"/>	<input type="checkbox"/>
DSL_FHA51T	FHA 5/1 T-BILL ARM	<input type="checkbox"/>	<input type="checkbox"/>

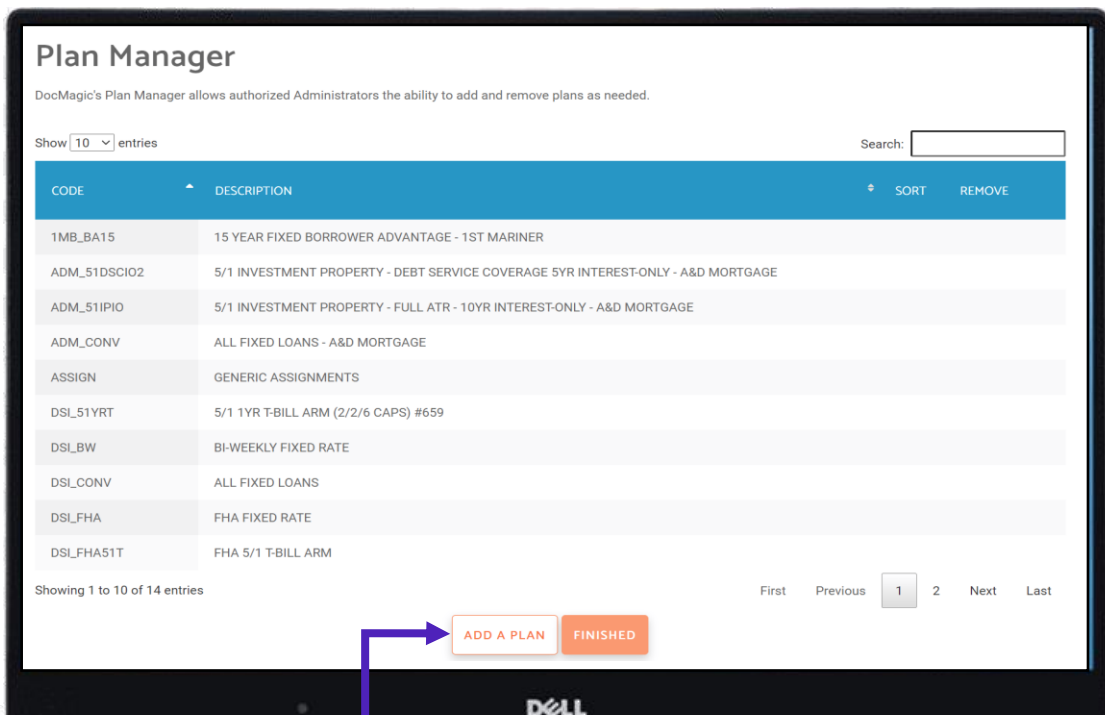
Showing 1 to 10 of 14 entries First Previous **1** 2 Next Last

DELL



Plan Manager

Add or remove a Plan



The screenshot displays the Plan Manager interface. At the top, it says "Plan Manager" and "DocMagic's Plan Manager allows authorized Administrators the ability to add and remove plans as needed." Below this, there is a "Show 10 entries" dropdown and a "Search:" input field. A table lists various plan codes and descriptions. At the bottom of the table, there are "ADD A PLAN" and "FINISHED" buttons. A blue arrow points from the "ADD A PLAN" button to a callout box.

CODE	DESCRIPTION	SORT	REMOVE
1MB_BA15	15 YEAR FIXED BORROWER ADVANTAGE - 1ST MARINER		
ADM_51DSCIO2	5/1 INVESTMENT PROPERTY - DEBT SERVICE COVERAGE 5YR INTEREST-ONLY - A&D MORTGAGE		
ADM_51PIO	5/1 INVESTMENT PROPERTY - FULL ATR - 10YR INTEREST-ONLY - A&D MORTGAGE		
ADM_CONV	ALL FIXED LOANS - A&D MORTGAGE		
ASSIGN	GENERIC ASSIGNMENTS		
DSL_51YRT	5/1 1YR T-BILL ARM (2/2/6 CAPS) #659		
DSL_BW	BI-WEEKLY FIXED RATE		
DSL_CONV	ALL FIXED LOANS		
DSL_FHA	FHA FIXED RATE		
DSL_FHA51T	FHA 5/1 T-BILL ARM		

Showing 1 to 10 of 14 entries

First Previous 1 2 Next Last

ADD A PLAN FINISHED

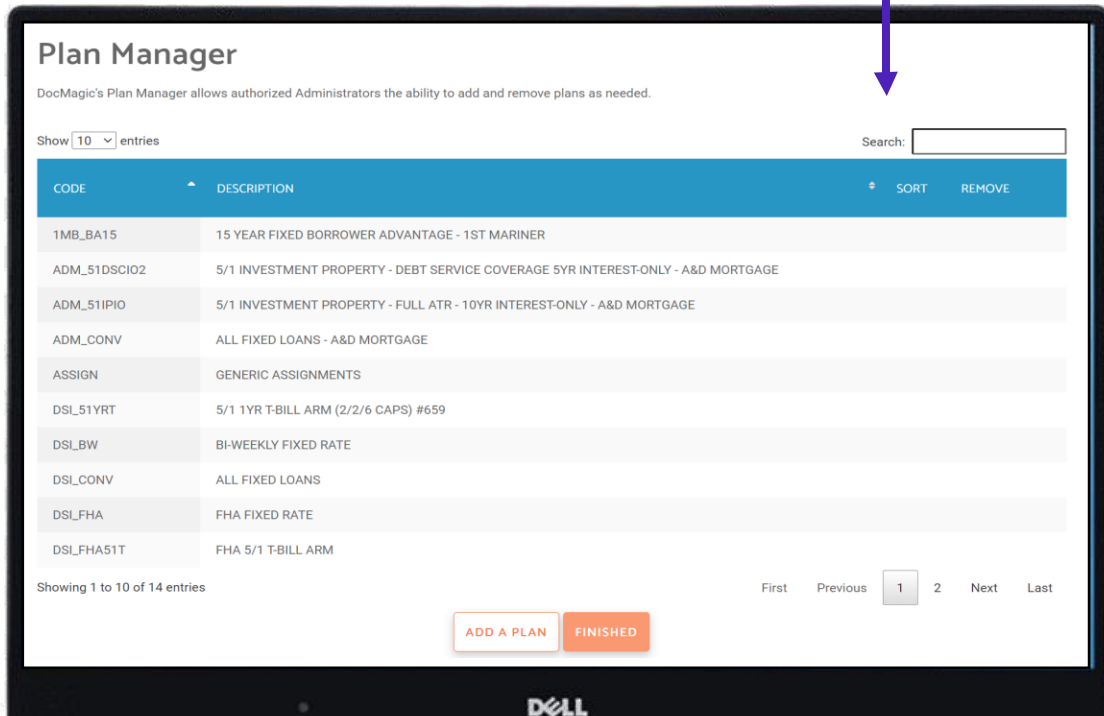
Click "Add a Plan" to be re-directed to the list of investors in our database.



Plan Manager

Add or remove a Plan

You can enter the investor name in the "Search" bar



The screenshot displays the Plan Manager interface. At the top, it says "DocMagic's Plan Manager allows authorized Administrators the ability to add and remove plans as needed." Below this, there is a "Show: 10 entries" dropdown and a "Search:" input field. A table lists various loan programs with columns for CODE, DESCRIPTION, SORT, and REMOVE. The table contains 14 rows of data. At the bottom, there are "ADD A PLAN" and "FINISHED" buttons, and a pagination control showing "1" of 2 pages.

CODE	DESCRIPTION	SORT	REMOVE
1MB_BA15	15 YEAR FIXED BORROWER ADVANTAGE - 1ST MARINER		
ADM_51DSCIO2	5/1 INVESTMENT PROPERTY - DEBT SERVICE COVERAGE 5YR INTEREST-ONLY - A&D MORTGAGE		
ADM_51IPIO	5/1 INVESTMENT PROPERTY - FULL ATR - 10YR INTEREST-ONLY - A&D MORTGAGE		
ADM_CONV	ALL FIXED LOANS - A&D MORTGAGE		
ASSIGN	GENERIC ASSIGNMENTS		
DSL_51YRT	5/1 1YR T-BILL ARM (2/2/6 CAPS) #659		
DSL_BW	BI-WEEKLY FIXED RATE		
DSL_CONV	ALL FIXED LOANS		
DSL_FHA	FHA FIXED RATE		
DSL_FHA51T	FHA 5/1 T-BILL ARM		

- Type "Generic" if you do not see your investor in our database, and use one of our generic loan programs
- Customer service can create investors and loan programs via a service request



Plan Manager

Add or remove a Plan

“Exists” means that the Loan Program is already in the account.

Select the plan that is to be added.

Show entries

Search:

CODE	DESCRIPTION	ADD
1MB_BA15	15 YEAR FIXED BORROWER ADVANTAGE - 1ST MARINER	Exists
1MB_BA30	30 YEAR FIXED BORROWER ADVANTAGE - 1ST MARINER	<input type="checkbox"/>
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	<input type="checkbox"/>
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

- “Activate all” will add check marks to all the boxes.
- “Deactivate all” will remove check marks from all the boxes.

You can select specific loan programs here.



Plan Manager

Add or remove a Plan

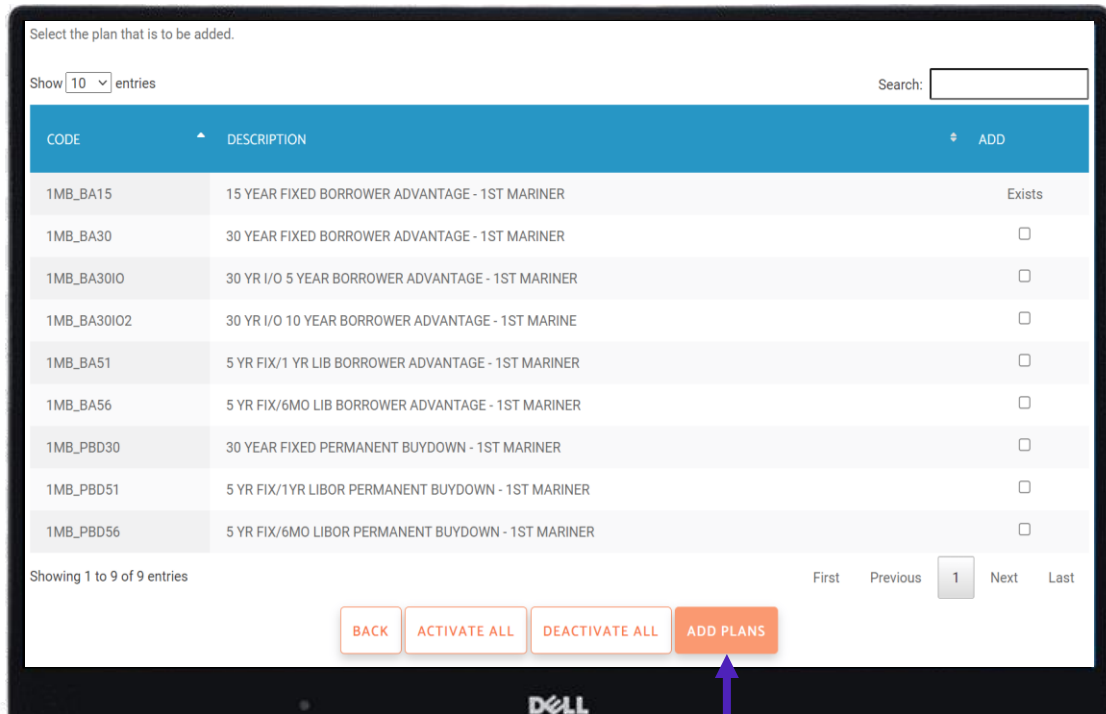
Select the plan that is to be added.

Show entries Search:

CODE	DESCRIPTION	ADD
1MB_BA15	15 YEAR FIXED BORROWER ADVANTAGE - 1ST MARINER	Exists
1MB_BA30	30 YEAR FIXED BORROWER ADVANTAGE - 1ST MARINER	<input type="checkbox"/>
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	<input type="checkbox"/>
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

[BACK](#) [ACTIVATE ALL](#) [DEACTIVATE ALL](#) [ADD PLANS](#)



Click "Add Plans" once you have chosen your loans to proceed



Plan Manager


Add or remove a Plan

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

Show entries Search:

CODE	DESCRIPTION	SORT	REMOVE
1MB_BA15	15 YEAR FIXED BORROWER ADVANTAGE - 1ST MARINER		
ADM_51DSCIO2	5/1 INVESTMENT PROPERTY - DEBT SERVICE COVERAGE 5YR INTEREST-ONLY - A&D MORTGAGE		
ADM_51IPIO	5/1 INVESTMENT PROPERTY - FULL ATR - 10YR INTEREST-ONLY - A&D MORTGAGE		
ADM_CONV	ALL FIXED LOANS - A&D MORTGAGE		
ASSIGN	GENERIC ASSIGNMENTS		
DSL_51YRT	5/1 1YR T-BILL ARM (2/2/6 CAPS) #659		
DSL_BW	BI-WEEKLY FIXED RATE		
DSL_CONV	ALL FIXED LOANS		
DSL_FHA	FHA FIXED RATE		
DSL_FHA51T	FHA 5/1 T-BILL ARM		

Showing 1 to 10 of 14 entries First Previous 2 Next Last

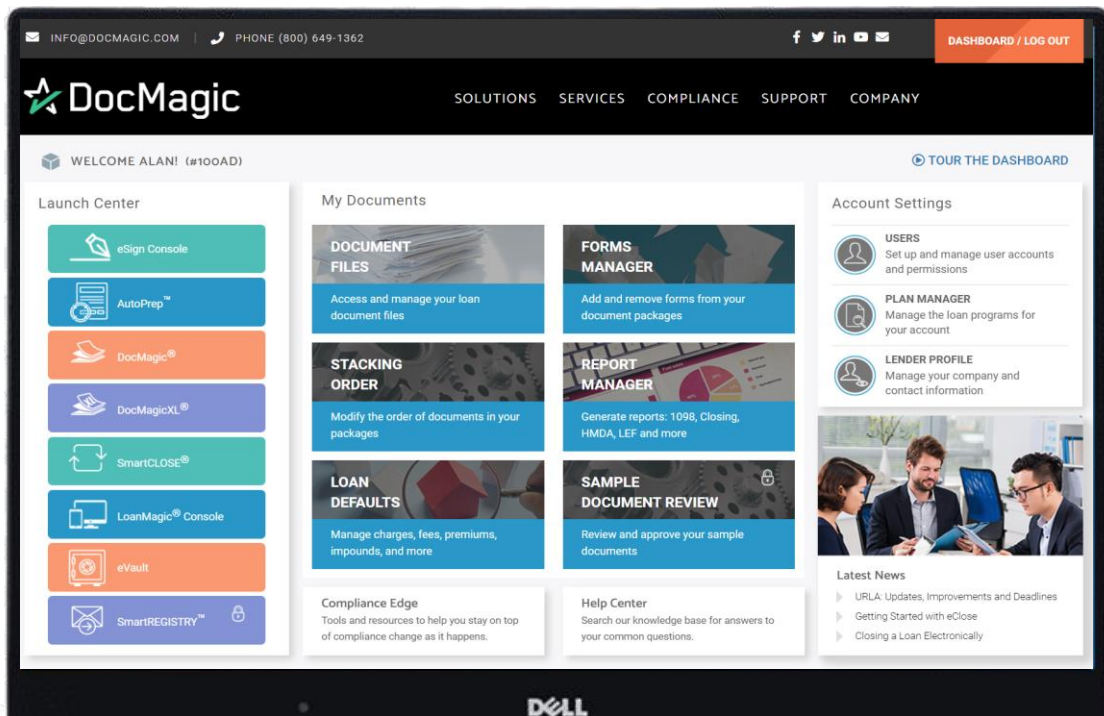


Click "Finished" to confirm your changes. This will bring you back to the dashboard.



Plan Manager

Add or remove a Plan



Any changes to the Loan Programs will now appear in the Plan Manager page.

Please remember to always click "Finished" until you are back on the Dashboard page. Your changes may not save otherwise.

