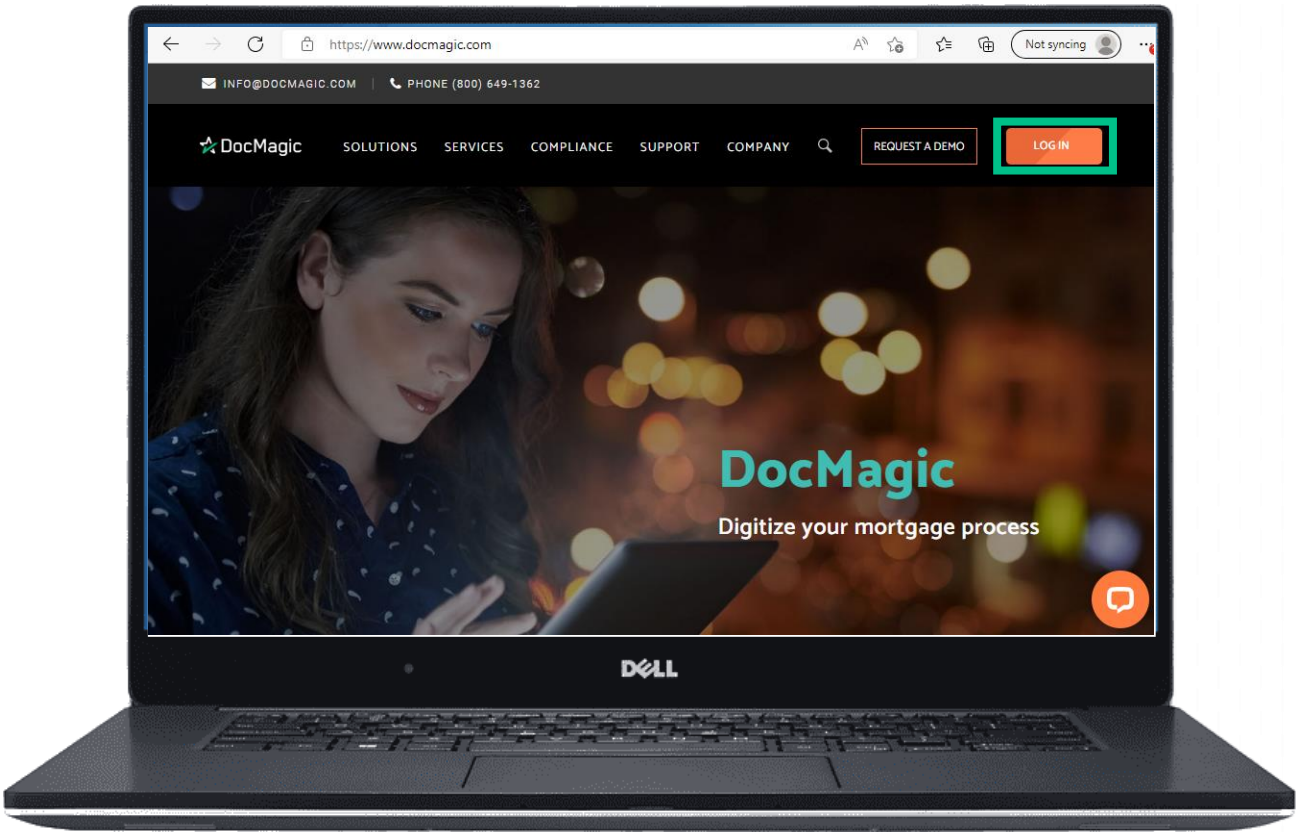
Plan Manager

LOGIN

Sign into your DocMagic Account

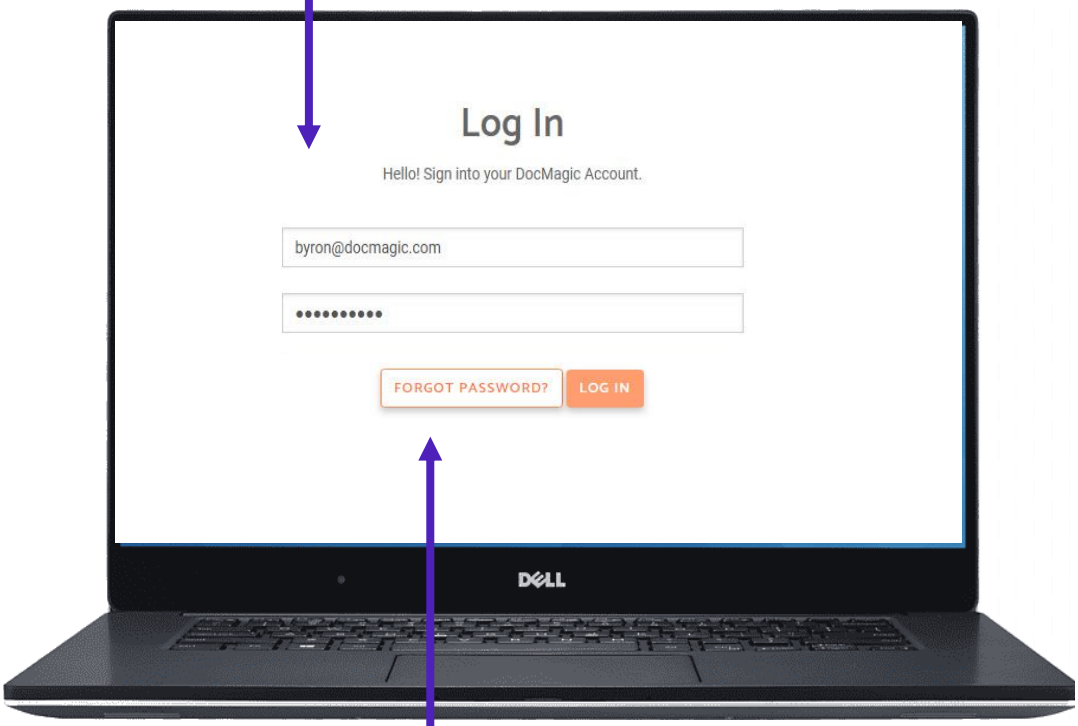
Go to www.docmagic.com



LOGIN

Sign Into Your DocMagic Account

Login with your email and password.



Click “Forgot password” to reset if it does not work

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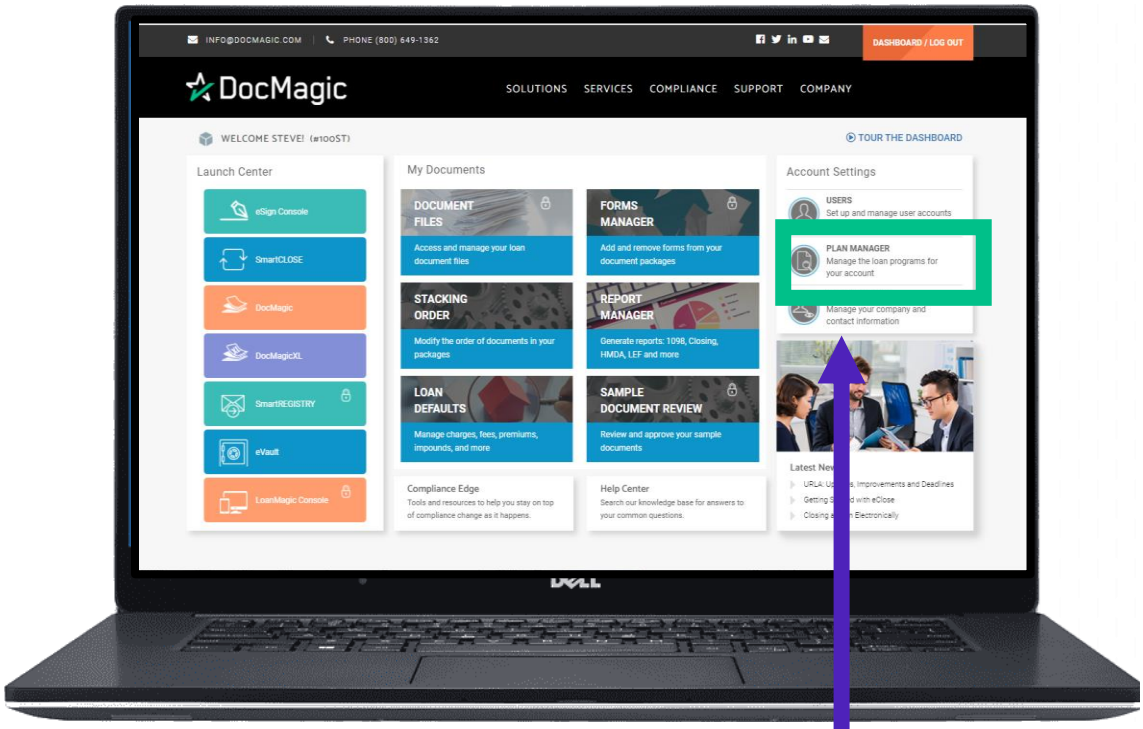

Click on “Plan Manager”

Plan Manager

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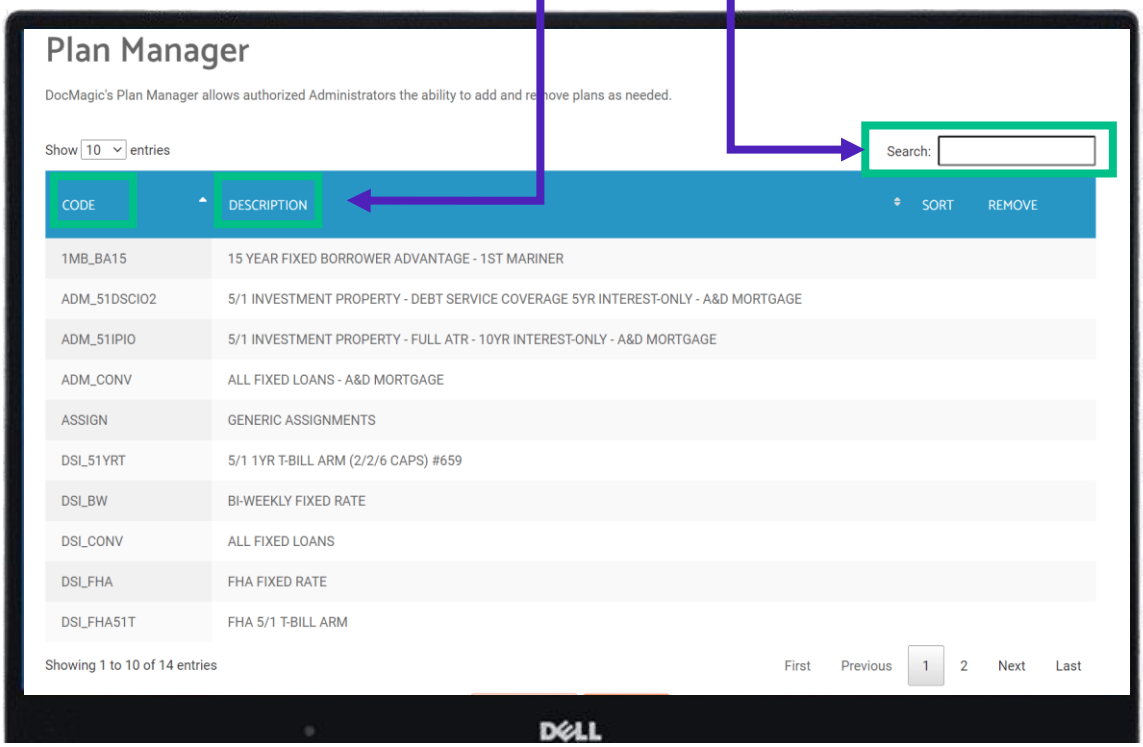
If you already have Loan Programs in your account, you can sort by Code or Description or look them up using the search bar



Plan Manager

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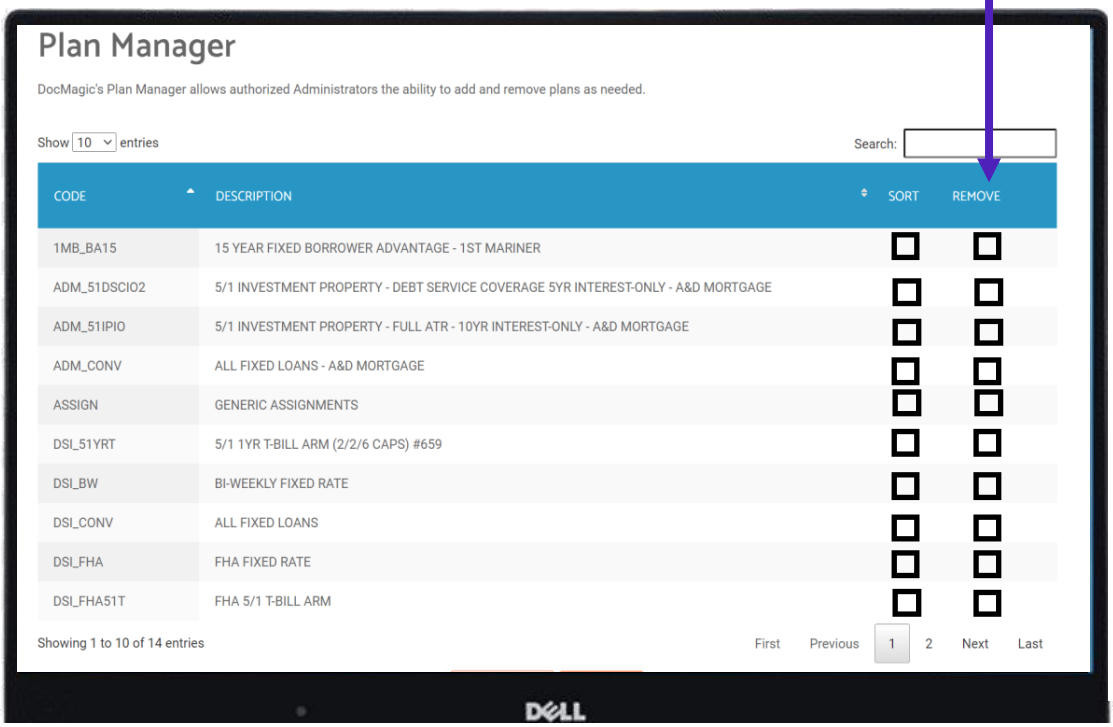
Click here to remove the Loan Program from your account



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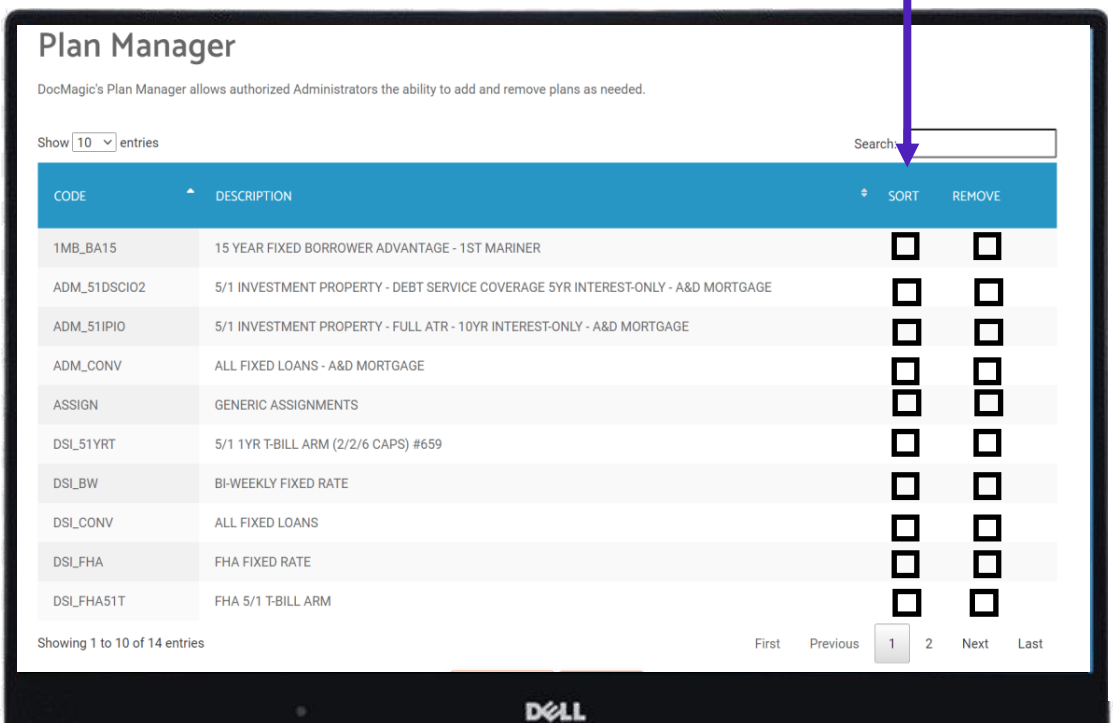
The "Sort" button will allow you to update the stacking order of the forms for the corresponding Loan Programs.



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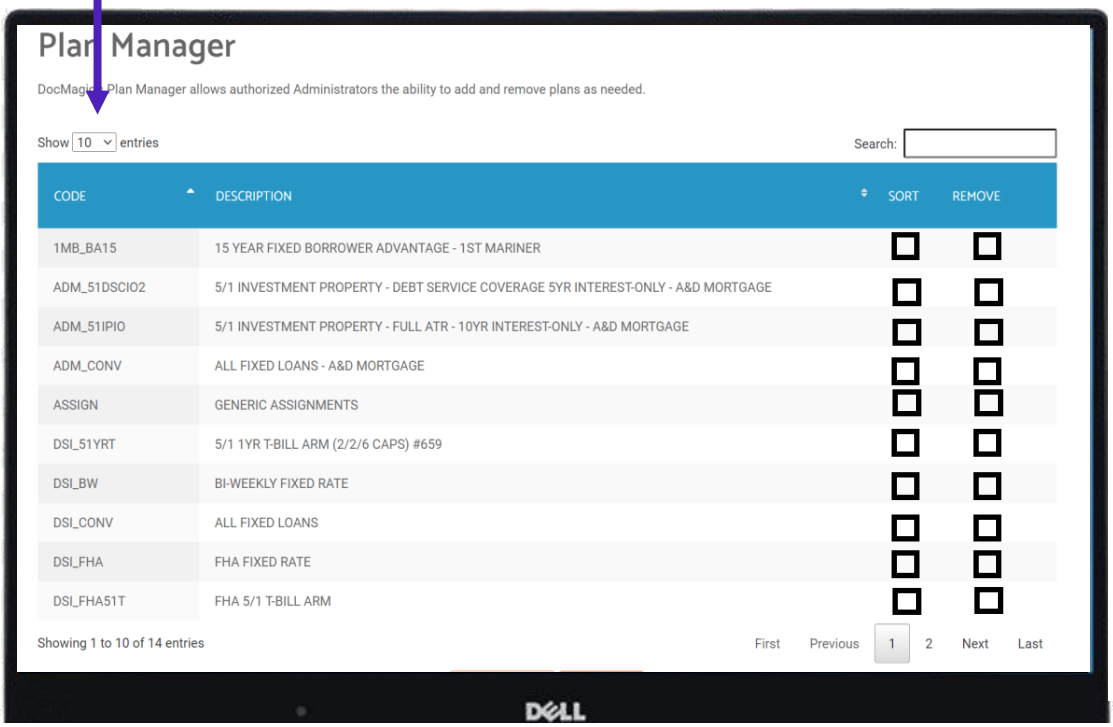
The dropdown menu will allow you to see more investors per page



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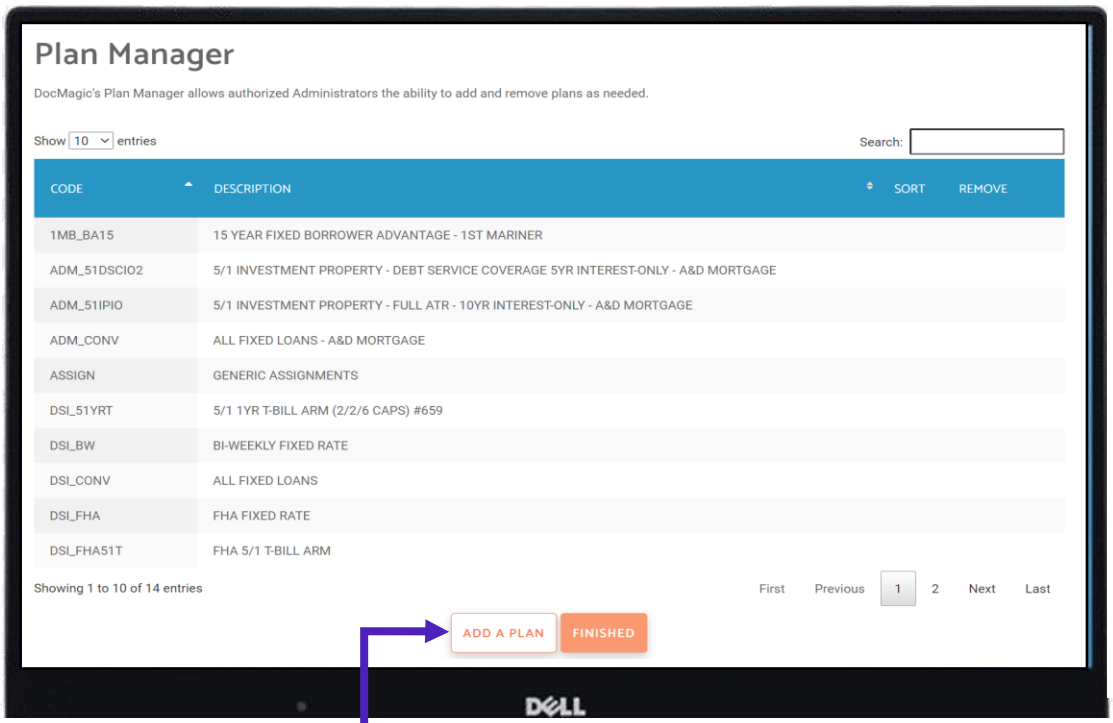
Add or remove a Plan



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

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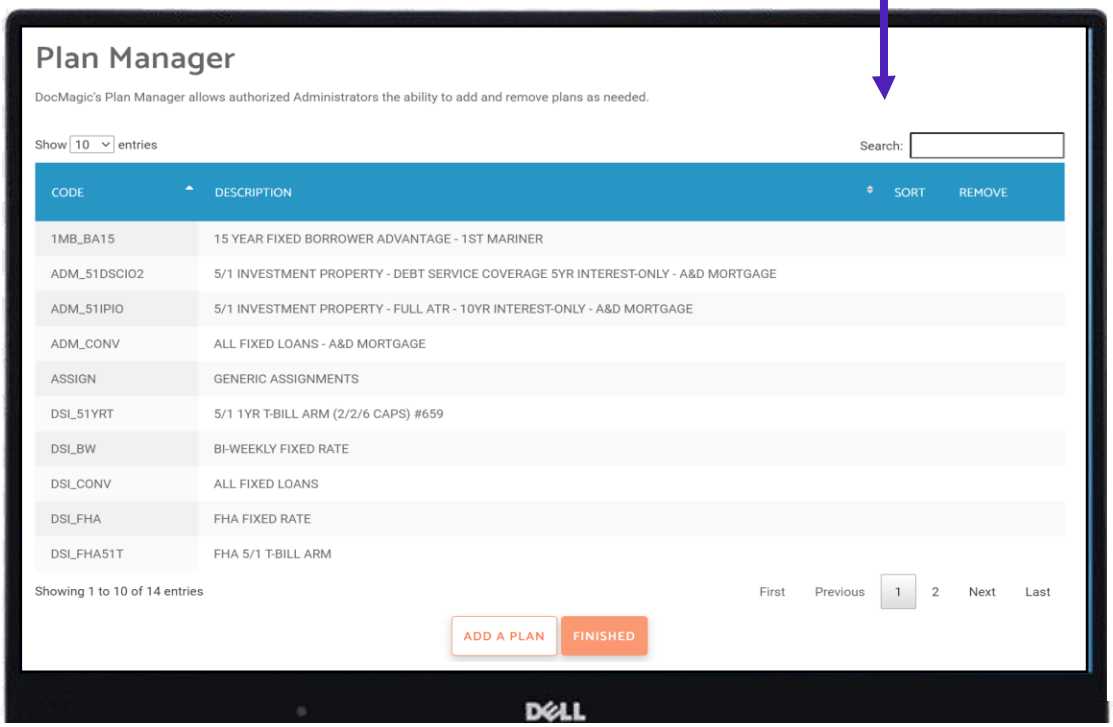
Add or remove a Plan

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

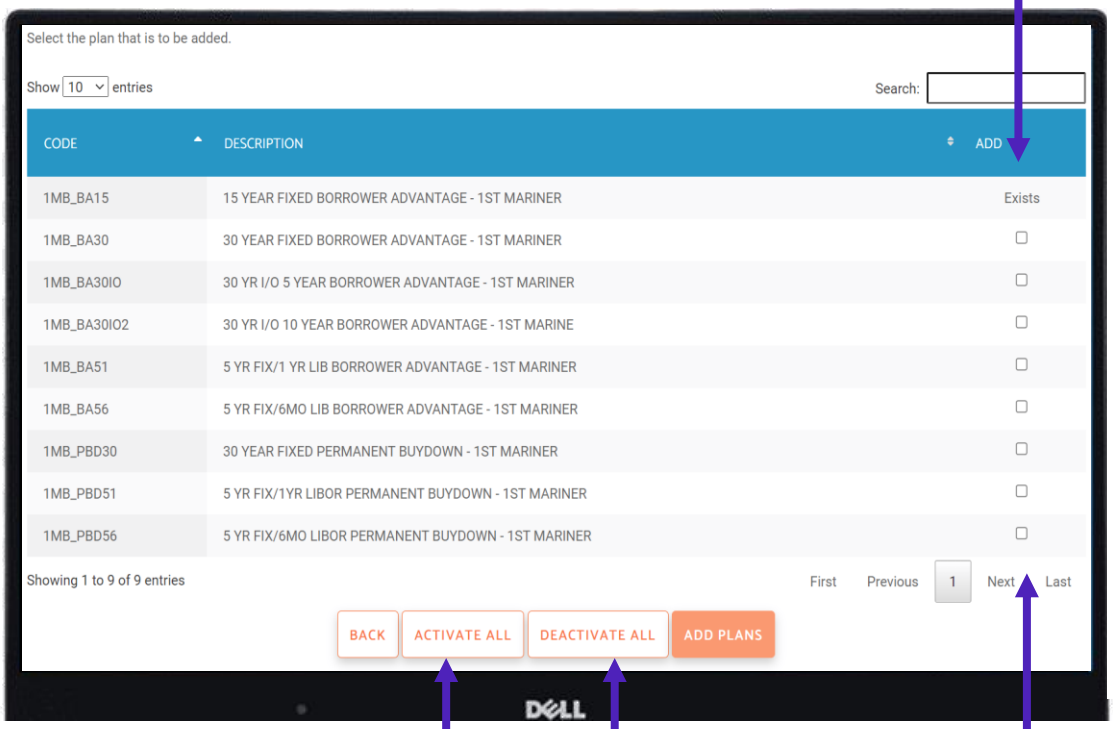


- Type "Generic" if you do not see your investor in our database, and use one of our generic loan programs
- Customer service can create investors and loan programs via a service request

Plan Manager

Add or remove a Plan

"Exists" means that the Loan Program is already in the account.



- "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.

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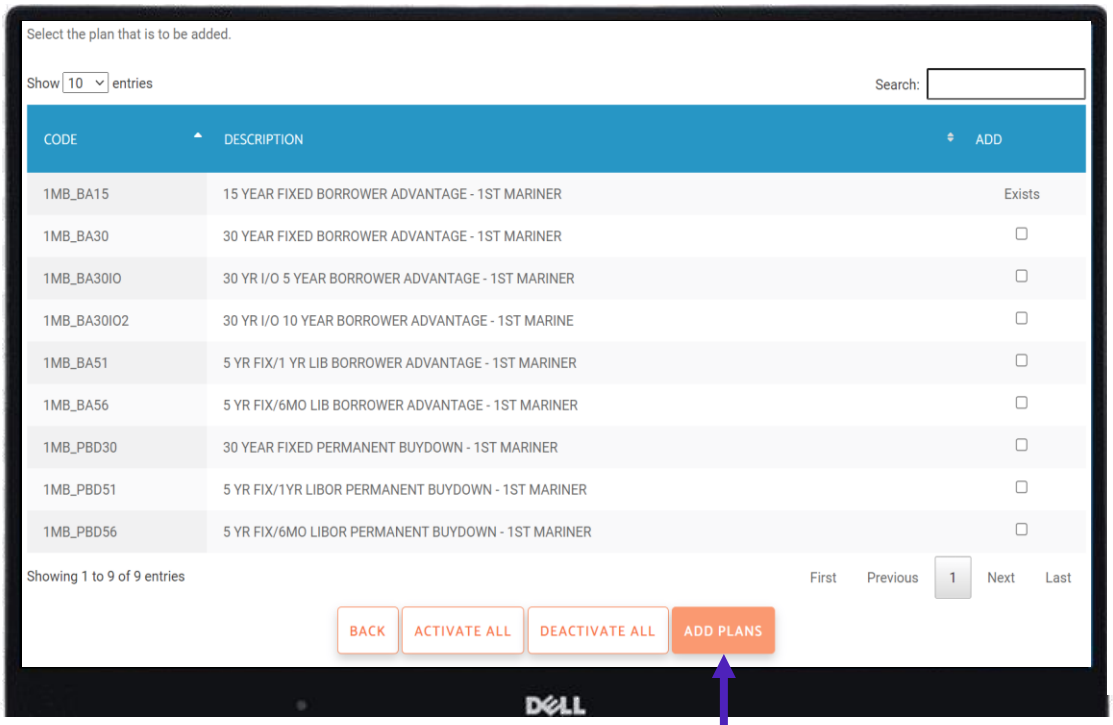
Add or remove a Plan



Click “Add Plans” once you have chosen your loans to proceed

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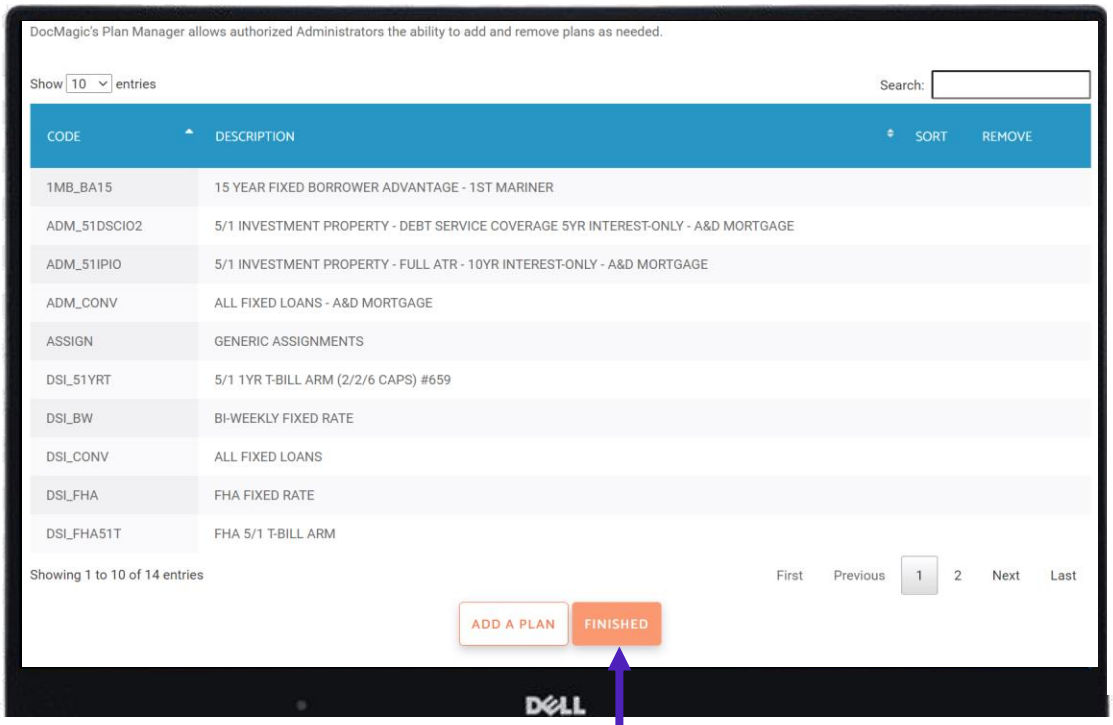
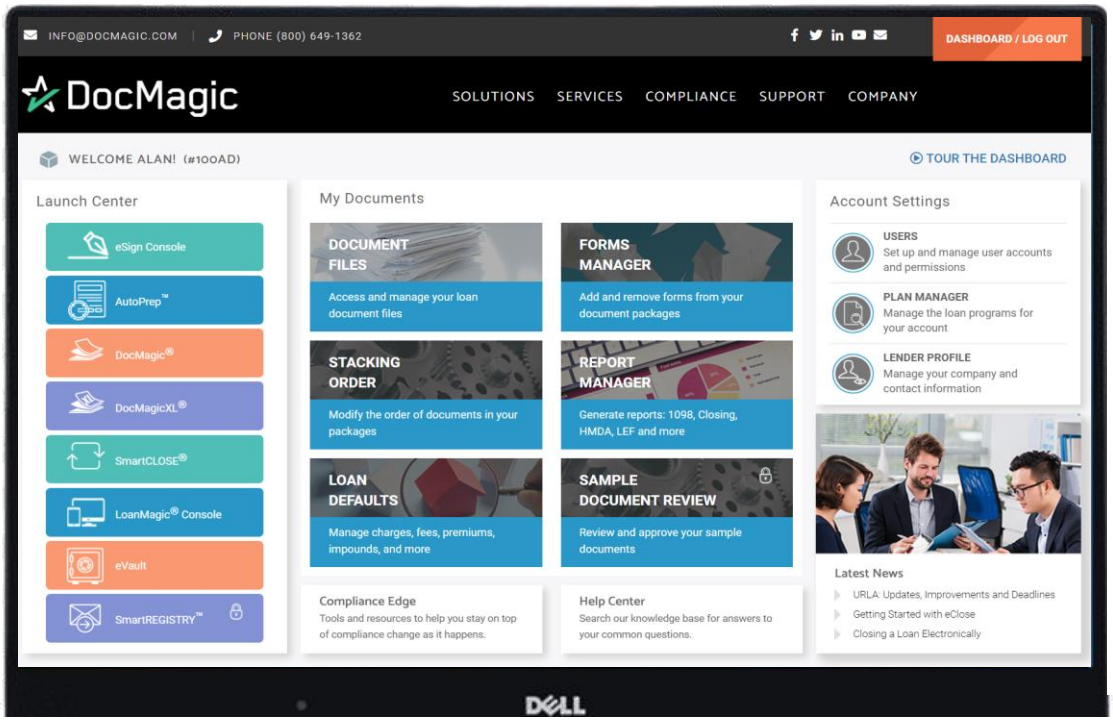
Add or remove a Plan



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.