| | User Privileges give a user access to information, allow the user to update account information, or affect how the account operates. See the Matrix below for the User Privileges and what they do |
|---|---|
| 1. Manage Users | Grants the user access to add, delete, and update user profiles |
| 2. Manage Plans | Grants the user access to add, delete, or request the creation of a custom loan program |
| 3. Form Analyzer | Grants the user the access to DocMagic's Form Analyzer tool to view and manage the documents on the account. |
| 4. Manage Plan Sorting | Grants the user access to DocMagic's Stacking Order tool to view and manage the sequence for forms to appear in the generated document sets |
| 5. Manage Lender Profile | Grants the user access to updating the Company Name, Contact Information, Beneficiary, Loss Payee, Payment Information, When Recorded Mail To, Trustee, Licensing/Identification, and UCD Provider Credentials |
| 6. Manage Loan Defaults | Grants the user access to preset charges and fees that can loaded into worksheet |
| 7. Generate Reports | Grants the user access to the Report Manager page to create HMDA, Closing, 1098 and Charge Reports |
| 8. DocMagic<br>- Process Docs<br>- Manage Alt. Lenders | Grants the user the ability to process loans in the DocMagic software. The "Process Documents" box must be checked to process a package. The "Alt. Lender" box must be checked if the user needs to close loans in a name different from what is in the Lender Profile. **The current version of Java must be installed on the computer to launch the software.** |
| 9. Document Files Administrator | Grants the user access to all processed packages regardless of whose login credentials it was processed with |
| 10. DocMaster Document Viewer | Grants the ability to use the email, attachments and annotation features in the DocMaster viewer when the boxes are checked. Download DocMaster here. |
| 11. eSign Console | Grants access to the eSign Console:<br>• eSign Console Admin grants the user access to all eDisclosures<br>• eSign Loan Originator grants the user access to only the eDisclosures processed using their login credentials<br>• eSign Reviewer grants the user access to view the eDisclosure but will not have any links to resend eDisclosures from within the console |
| 12. Compliance | Grants the user access to the compliance articles on our website – see your sales representative for pricing details |
| 13. eVault | A secure short or long-term solution that offers real-time control of your electronic loan files, reducing cycle times and increasing process efficiencies throughout the entire mortgage lifecycle |
| 14. SmartRegistry | A solution to initiate transactions with the MERS eRegistry |
| 15. SmartCLOSE | A solution where lenders, settlement providers and associates can work together inside a secure real-time collaborative closing software to view, edit, and exchange data and fees prior to closing |
| 16. LoanMagic for Borrowers | A mobile solution for borrowers to stay updated on the progress of their loan that includes eSign |
| 17. Role Administration | Grants a user the ability to create, name, and select user privileges within the roles created |
| 18. AutoPrep | Grants the user the authority to use DocMagic's AutoPrep solution |