

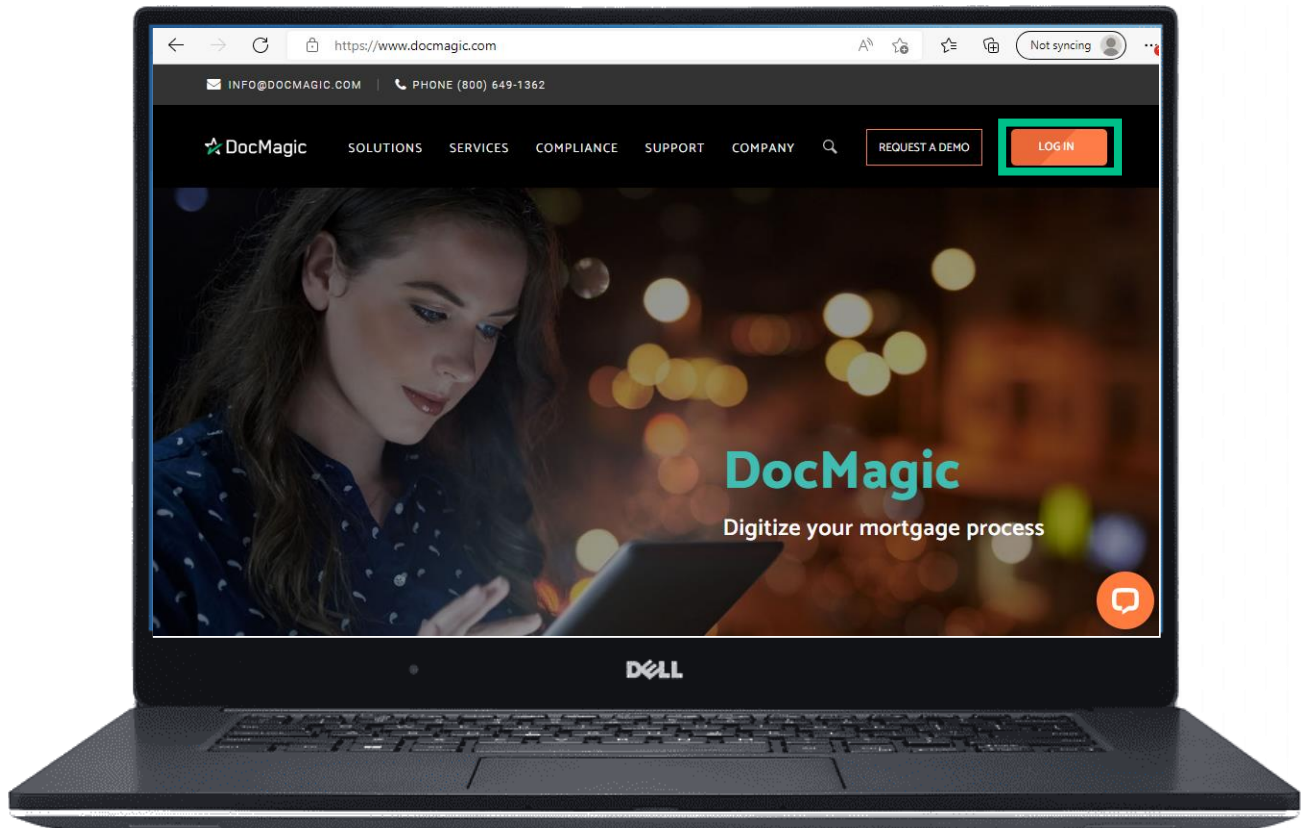


User Account Set-up

User Account Set-Up

Navigating to User Account Set-Up

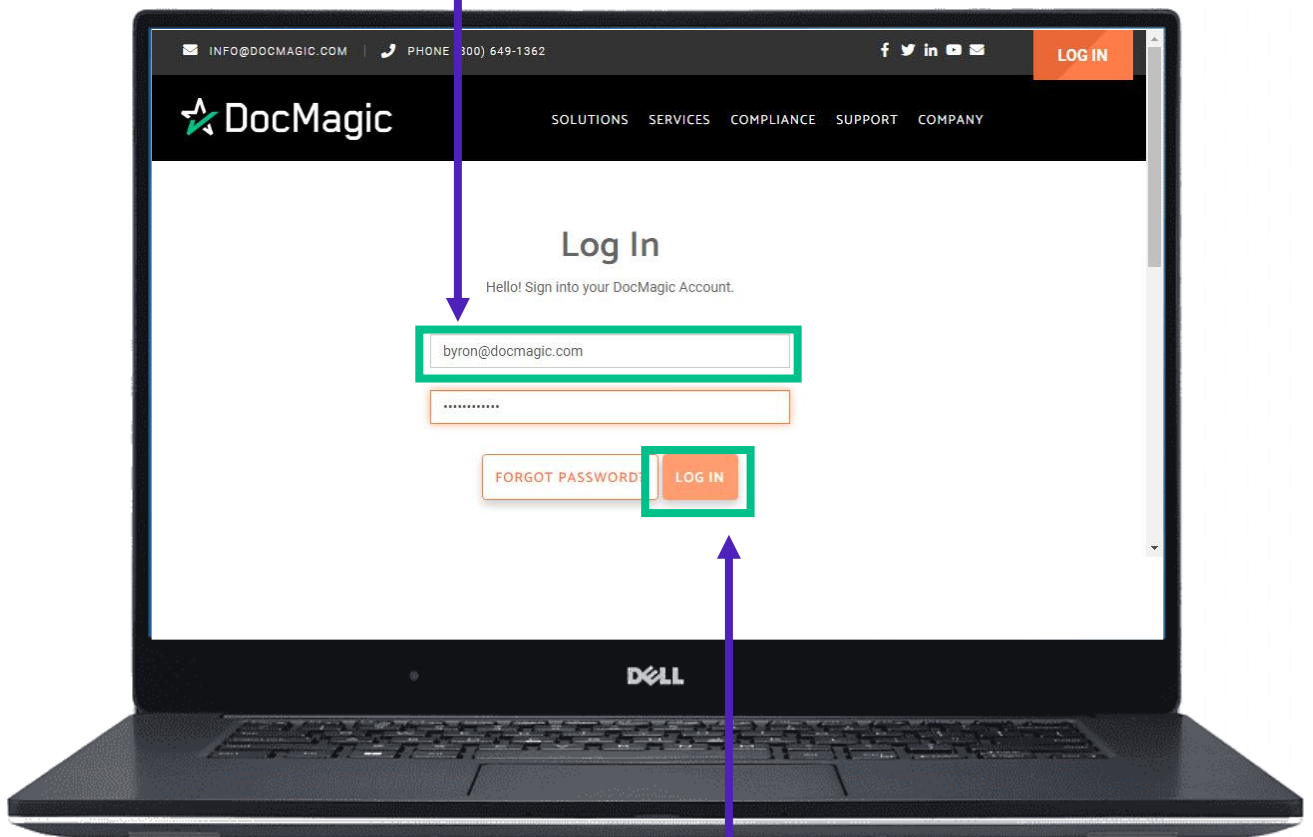
Go to www.docmagic.com



User Account Set-Up

Navigating to User Account Set-Up

Login with your
email and
password.



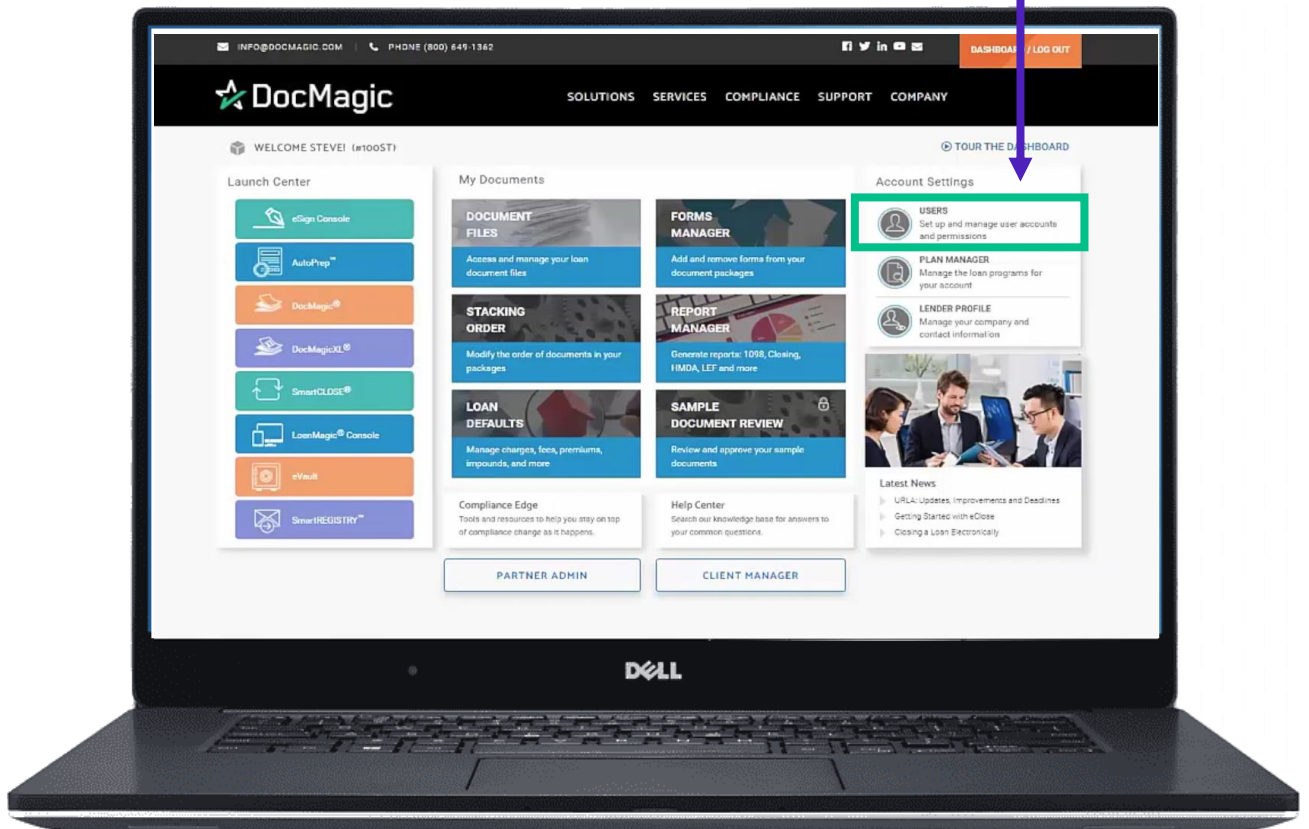
Click "LOG IN"



User Account Set-Up

Navigating to User Account Set-Up

Choose Users from
the Dashboard



User Account Set-Up

User Accounts

You'll be greeted with a list of all DocMagic users. Click on the Last Name, First Name, or User Email to update an existing User Account.

The screenshot displays the DocMagic User Accounts interface. At the top, there is a navigation bar with the DocMagic logo and links for SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, and COMPANY. There are also buttons for REQUEST A DEMO and DASHBOARD / LOG OUT. Below the navigation bar, the page title is "User Accounts". There is a "Show 10 entries" dropdown and a search box. The main content is a table with the following columns: LAST NAME, FIRST NAME, USER EMAIL, and REMOVE. The first row of the table is highlighted, and the text from the previous slide points to the Last Name, First Name, and User Email columns.

LAST NAME	FIRST NAME	USER EMAIL	REMOVE
Carrillo	Ron	ron@docmagic.com	
DeGuire	Carrie	carrie@docmagic.com	
Dunlop	Richard	rdunlop@docmagic.com	
Eyre	Aimee	aimee@docmagic.com	
Forthmann	Ward	ward@docmagic.com	
Garrett	David	david@docmagic.com	

Editing a user is very similar to adding a new user, which we will go over in a few slides.



User Account Set-Up

User Accounts

Click on the arrow to sort the data by the corresponding column. For example, the table below is currently sorted by last name.

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

DocMagic SOLUTIONS SERVICES COMPLIANCE SUPPORT COMPANY [REQUEST A DEMO](#) [DASHBOARD / LOG OUT](#)

User Accounts

Show entries

LAST NAME	FIRST NAME	USER EMAIL	REMOVE
Carrillo	Ron	ron@docmagic.com	
DeGuire	Carrie	carrie@docmagic.com	
Dunlop	Richard	rdunlop@docmagic.com	
Eyre	Aimee	aimee@docmagic.com	
Forthmann	Ward	ward@docmagic.com	
Garrett	David	david@docmagic.com	

DELL



User Account Set-Up

User Accounts

Click here to remove a user.

The screenshot shows the DocMagic User Accounts management page. At the top, there is a navigation bar with contact information (INFO@DOCMAGIC.COM, PHONE (800) 649-1362), social media icons, and a DASHBOARD / LOG OUT button. Below the navigation bar is the DocMagic logo and a menu with SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, and COMPANY. The main content area is titled "User Accounts" and includes a "Show 10 entries" dropdown and a search box. A table lists user accounts with columns for LAST NAME, FIRST NAME, USER EMAIL, and REMOVE. The first entry is "Truitt, Steve" with email "struitt@docmagic.com". A green box highlights the "REMOVE" button for this user. Below the table are navigation links: First, Previous, 1, Next, Last. At the bottom of the main content area are three buttons: "ADD USER", "ROLES", and "FINISHED". A green box highlights the "ADD USER" button. A purple arrow points from the "REMOVE" button in the table to the text box above, and another purple arrow points from the "ADD USER" button to the text box below.

LAST NAME	FIRST NAME	USER EMAIL	REMOVE
Truitt	Steve	struitt@docmagic.com	

Click here to add a new user.



User Account Set-Up

User Information

Enter user information here. All fields with a red asterisk (*) to the left must be completed.

Please enter the relevant data for the new user.

New User Information:

User Information

* First Name: John

* Last Name: Smith

* Email: jsmith@docmagic.com

Contact Information

* Phone: 3333333333

User Password

* Password:

Password should be 8-64 characters including at least one uppercase character, one lowercase character, one numeric digit, and one special symbol.

* Confirm Password:

Email confirmation

Do not expire password

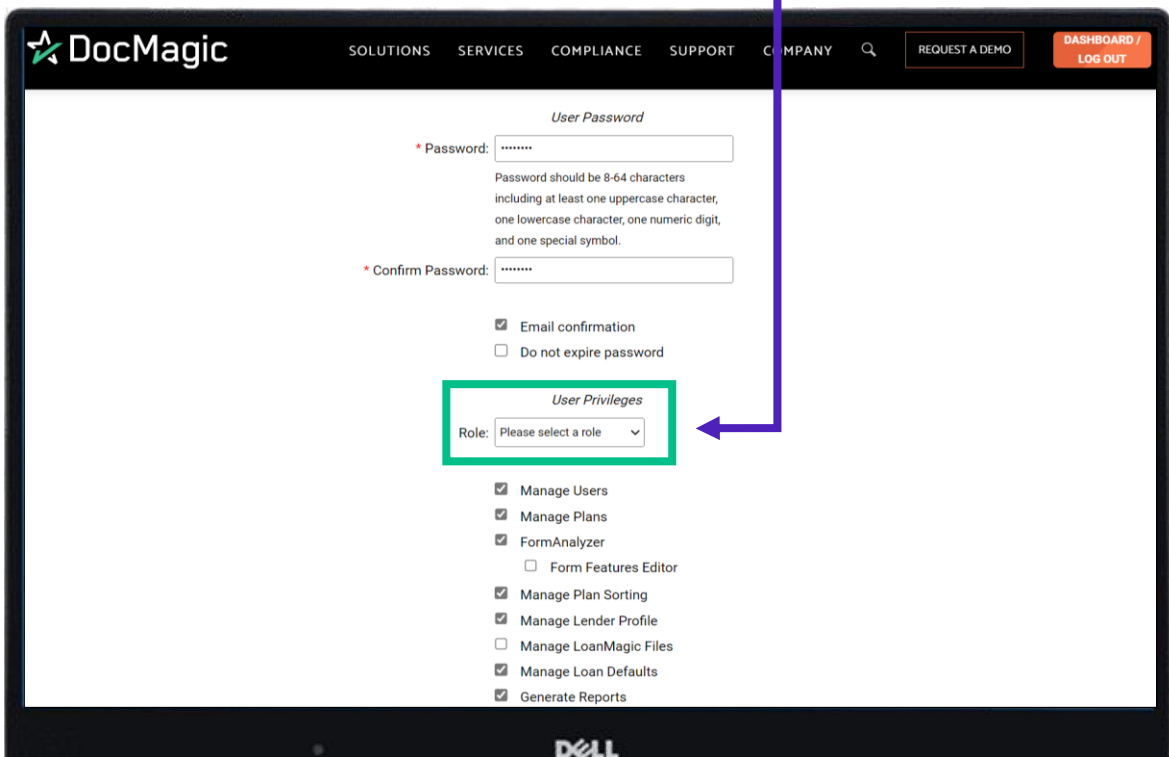
You'll have to enter a password for the new User. We recommend entering a temporary password that the new user can change once they receive a confirmation e-mail. Check "Email Confirmation" to enable this option.



User Account Set-Up

User Roles

Scroll down to the User Privileges. User Roles speed up the process of adding new users – we'll explain this later in the guide.



The screenshot shows the DocMagic user account setup interface. The top navigation bar includes the DocMagic logo and links for SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, and COMPANY. There are also buttons for REQUEST A DEMO and DASHBOARD / LOG OUT. The main content area is titled "User Password" and contains fields for Password and Confirm Password, along with a list of password requirements. Below this is the "User Privileges" section, which is highlighted with a green box. This section includes a "Role:" dropdown menu and a list of checkboxes for various permissions: Manage Users, Manage Plans, FormAnalyzer, Form Features Editor, Manage Plan Sorting, Manage Lender Profile, Manage LoanMagic Files, Manage Loan Defaults, and Generate Reports. A blue arrow points from the text above to the "Role:" dropdown menu.

DocMagic SOLUTIONS SERVICES COMPLIANCE SUPPORT COMPANY [REQUEST A DEMO](#) [DASHBOARD / LOG OUT](#)

User Password

* Password:

Password should be 8-64 characters including at least one uppercase character, one lowercase character, one numeric digit, and one special symbol.

* Confirm Password:

Email confirmation
 Do not expire password

User Privileges

Role:

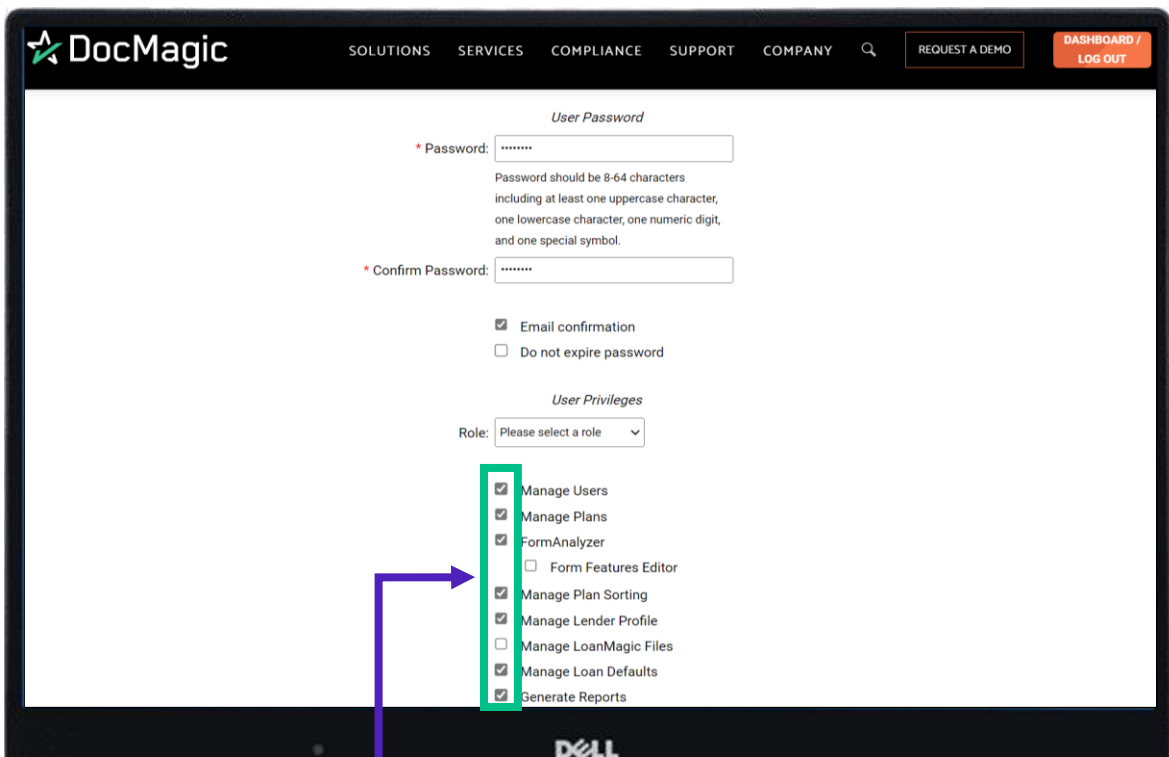
Manage Users
 Manage Plans
 FormAnalyzer
 Form Features Editor
 Manage Plan Sorting
 Manage Lender Profile
 Manage LoanMagic Files
 Manage Loan Defaults
 Generate Reports



User Account Set-Up

User Privileges

We've included a lot of helpful links in this guide to let you learn more about specific user privileges. Any blue underlined text will take you to a specific link on our [Product Training Page](#).



The screenshot shows the DocMagic user account setup interface. The top navigation bar includes the DocMagic logo, menu items (SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, COMPANY), a search icon, and buttons for 'REQUEST A DEMO' and 'DASHBOARD / LOG OUT'. The main content area is titled 'User Password' and contains two password fields with a strength indicator: 'Password:, Password should be 8-64 characters including at least one uppercase character, one lowercase character, one numeric digit, and one special symbol.' Below this is a 'Confirm Password:' field. There are two checkboxes: 'Email confirmation' (checked) and 'Do not expire password' (unchecked). The 'User Privileges' section has a 'Role:' dropdown menu set to 'Please select a role'. A list of privileges follows, each with a checkbox: 'Manage Users' (checked), 'Manage Plans' (checked), 'FormAnalyzer' (checked), 'Form Features Editor' (unchecked), 'Manage Plan Sorting' (checked), 'Manage Lender Profile' (checked), 'Manage LoanMagic Files' (unchecked), 'Manage Loan Defaults' (checked), and 'Generate Reports' (checked). A green box highlights the checkboxes for 'FormAnalyzer', 'Manage Plan Sorting', 'Manage Lender Profile', 'Manage Loan Defaults', and 'Generate Reports'. A blue arrow points from the bottom of this green box to a text box below the screenshot.

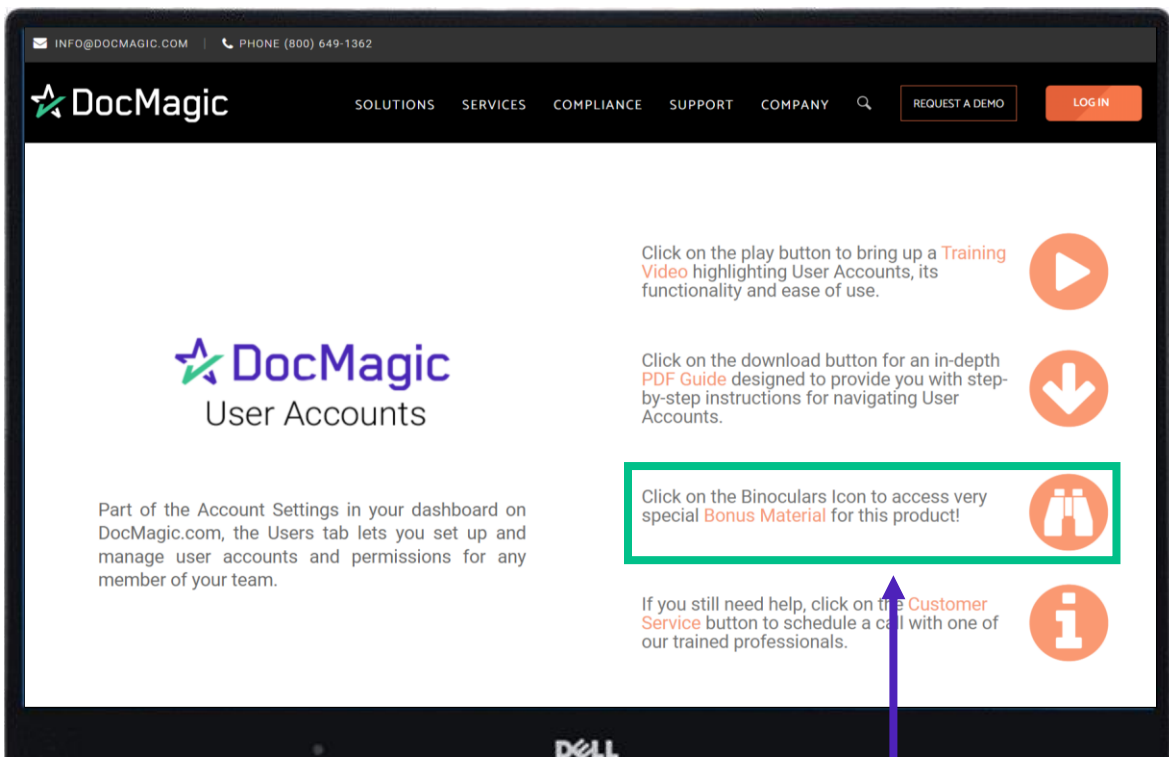
Checking the box gives the user that privilege. Leaving the box unchecked denies the user of that privilege.



User Account Set-Up

User Privilege Cheat Sheet

There are a LOT of user privileges! Click here for a [one-page cheat sheet](#) that explains all of them briefly.



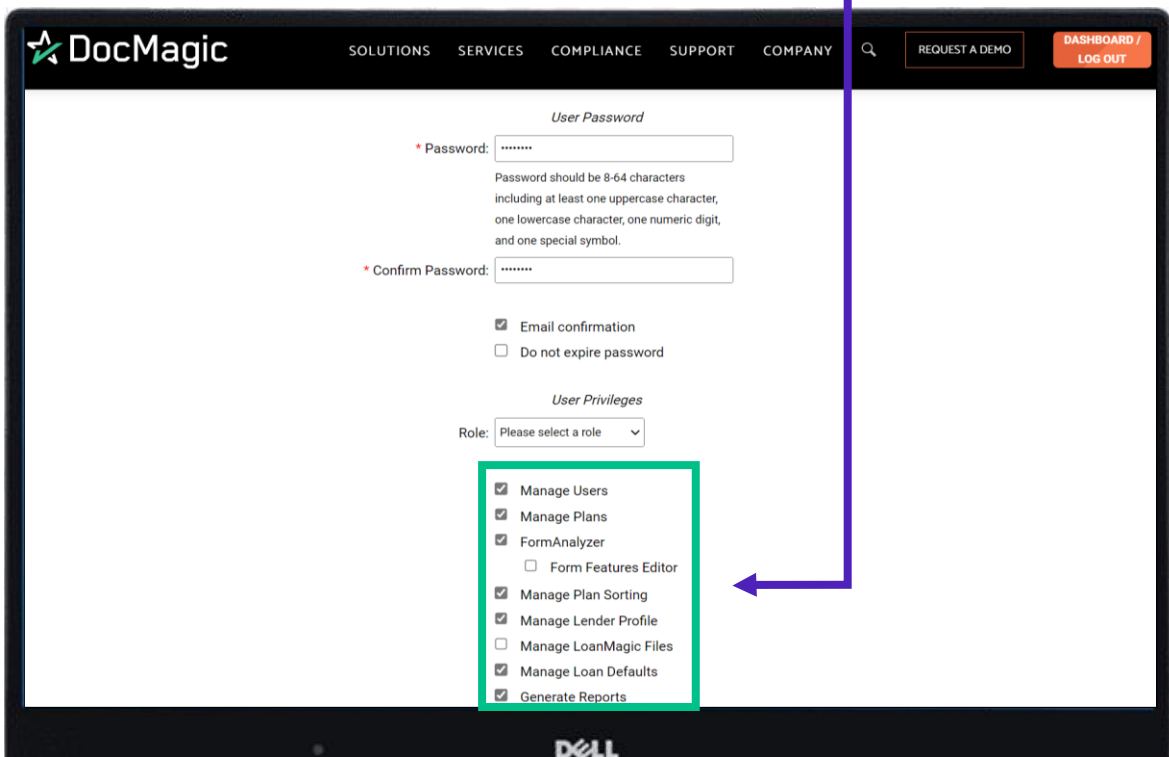
This sheet can be accessed any time by clicking [here](#) on the Product Training Page.



User Account Set-Up

User Privileges Explained

The first set of privileges can be thought of as administrative ones. Can the user manage other users? Can they generate reports?



The screenshot shows the DocMagic user account setup interface. The page is titled "User Password" and "User Privileges". The "User Password" section includes fields for "Password" and "Confirm Password", both masked with dots. Below these fields is a note: "Password should be 8-64 characters including at least one uppercase character, one lowercase character, one numeric digit, and one special symbol." There are two checkboxes: "Email confirmation" (checked) and "Do not expire password" (unchecked). The "User Privileges" section has a "Role:" dropdown menu set to "Please select a role". Below the dropdown is a list of privileges, each with a checkbox:

- Manage Users
- Manage Plans
- FormAnalyzer
 - Form Features Editor
- Manage Plan Sorting
- Manage Lender Profile
- Manage LoanMagic Files
- Manage Loan Defaults
- Generate Reports

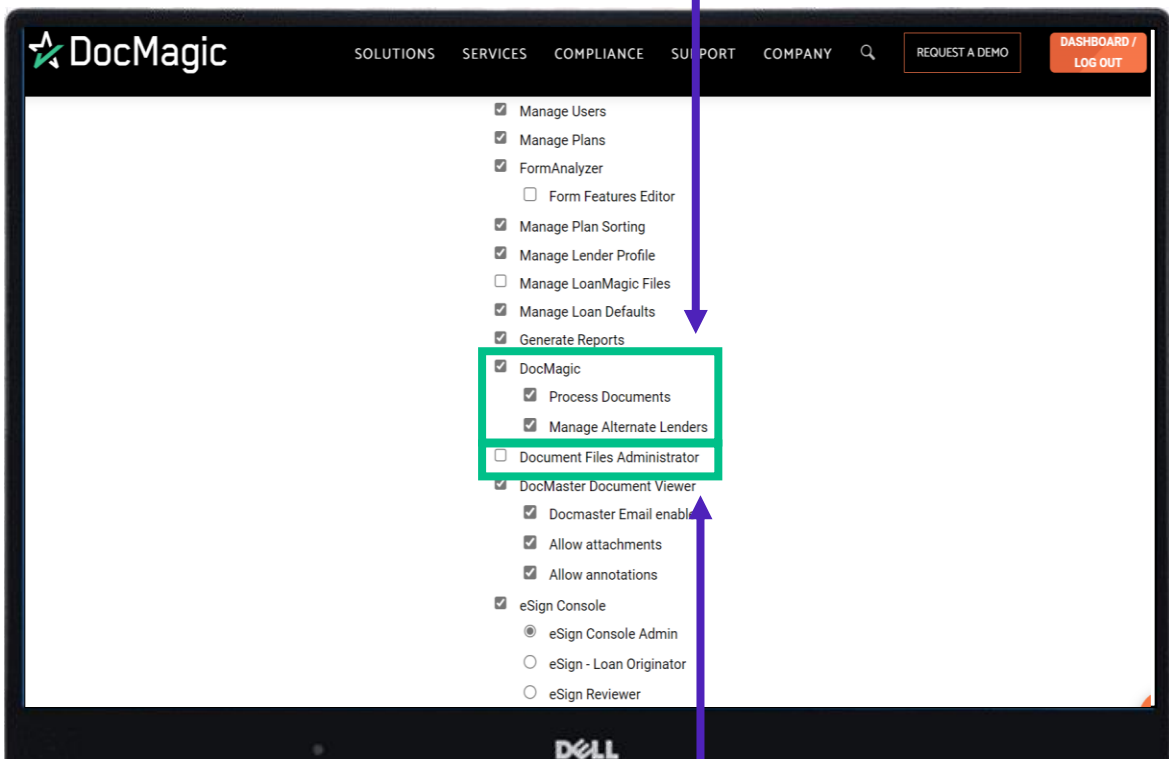
A blue arrow points from the text box above to the "Generate Reports" checkbox in the list.



User Account Set-Up

User Privileges Explained

“DocMagic” gives the user access to [DocMagic Online](#).



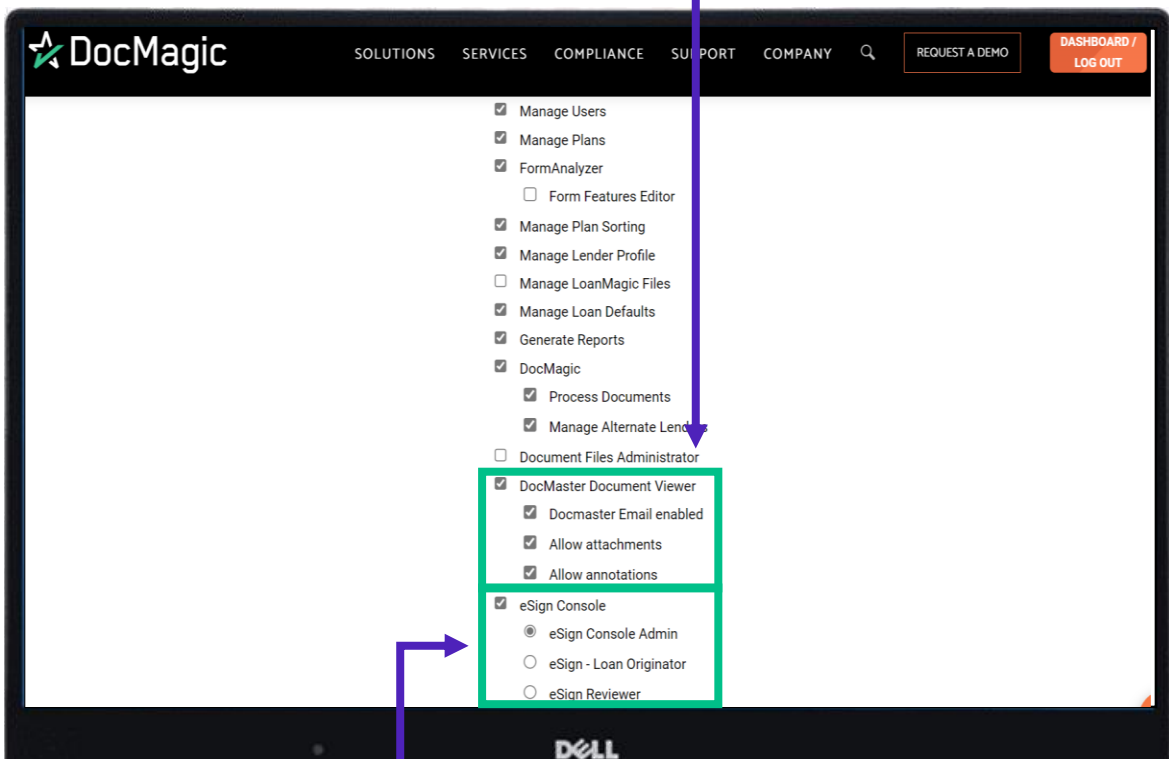
“Document Files Administrator” allows the user to access and manage loan documents via [Document Files](#).



User Account Set-Up

User Privileges Explained

“DocMaster Document Viewer” gives the user access to [DocMaster](#) – DocMagic’s proprietary document management tool.



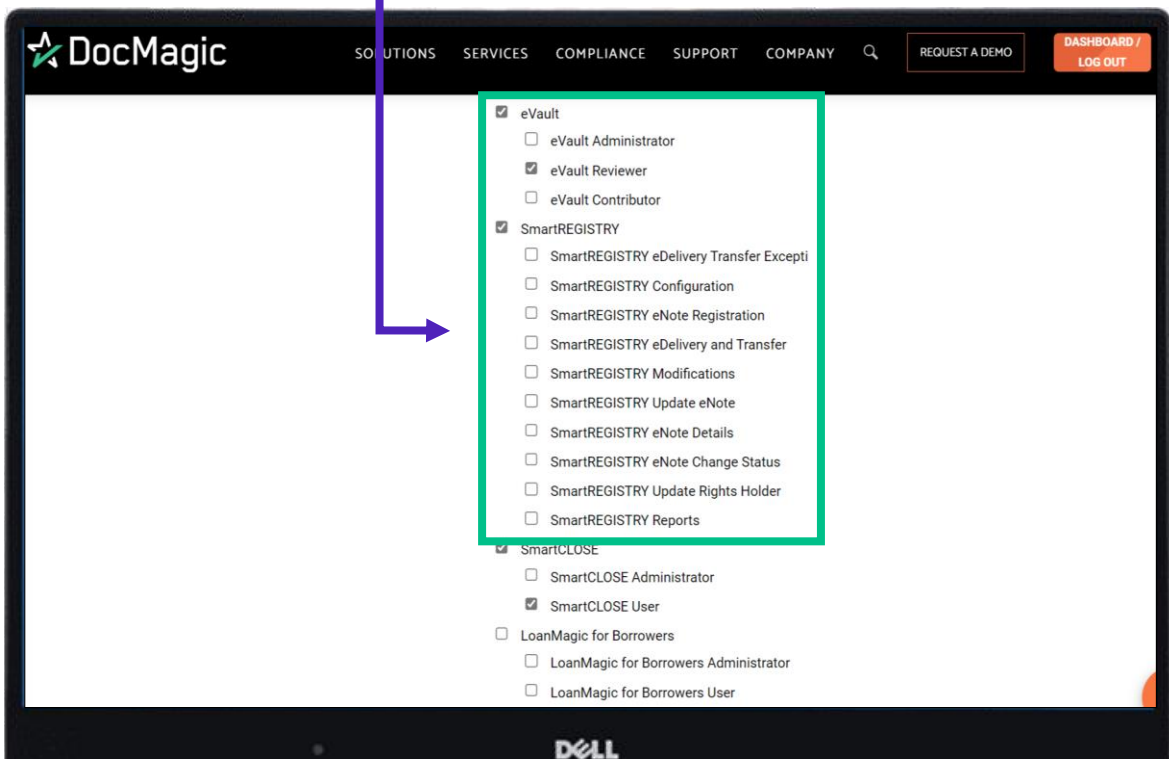
The [eSign Console](#) allows the user to access and manage loan document packages that have been processed within the last 90 days.



User Account Set-Up

User Privileges Explained

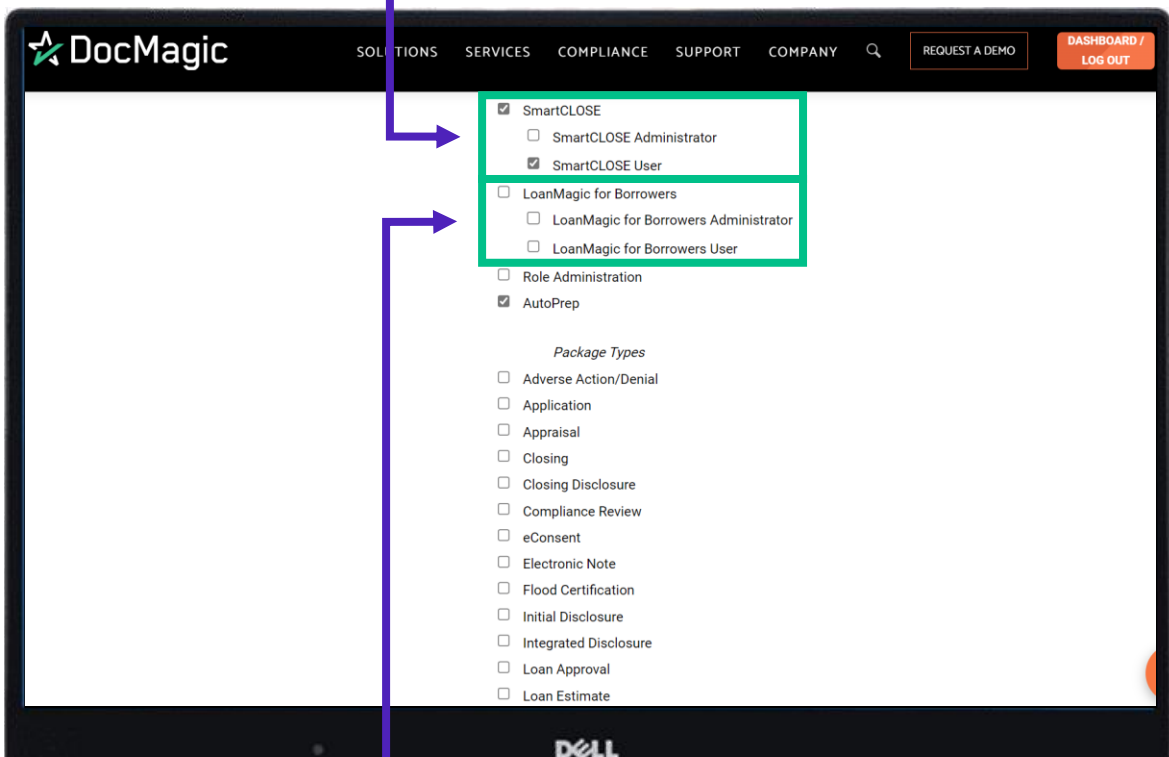
[eVault](#) and [SmartRegistry](#) are used to manage and transfer electronic loan files.



User Account Set-Up

User Privileges Explained

SmartCLOSE is a closing portal between lenders and settlement agents.



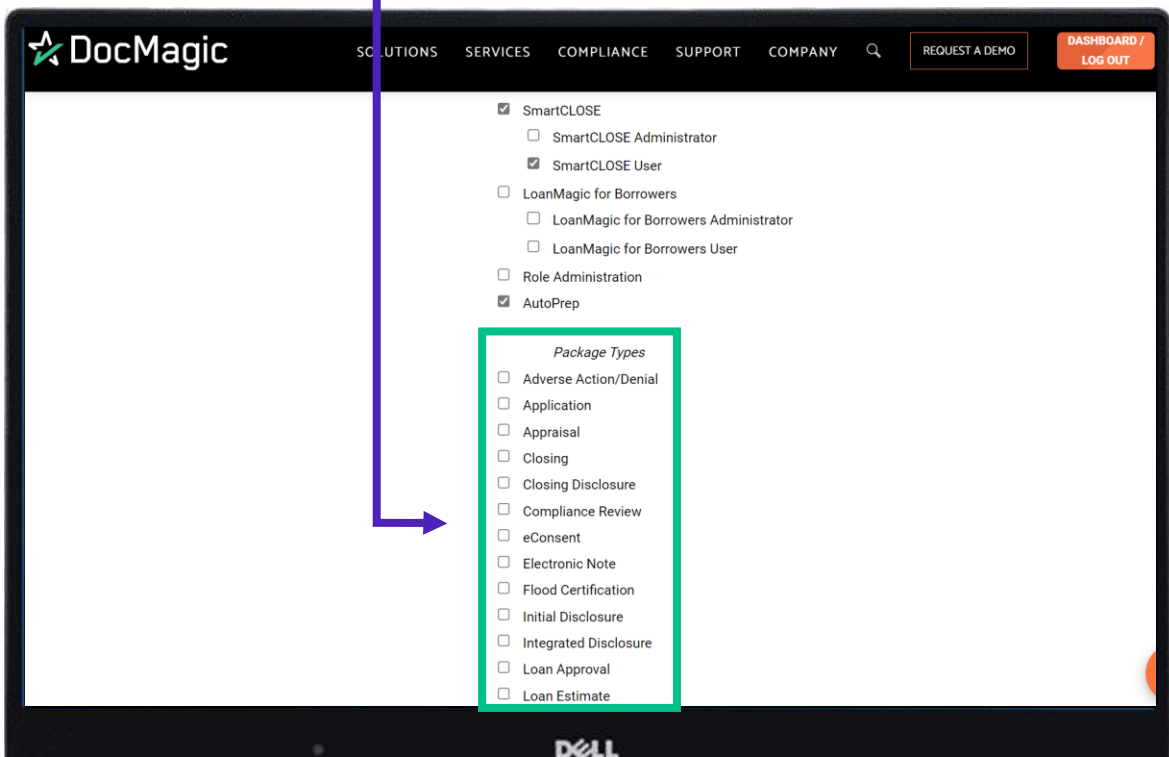
LoanMagic is our app that allows borrowers to go through the loan process from their mobile device.



User Account Set-Up

Package Types

DocMagic processes many package types – a checkmark means the user has permission to process the package.



The screenshot shows the DocMagic user account setup interface. The top navigation bar includes the DocMagic logo, menu items (SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, COMPANY), a search icon, and buttons for 'REQUEST A DEMO' and 'DASHBOARD / LOG OUT'. The main content area displays a list of package types with checkboxes. A green box highlights the 'Package Types' section, which includes the following items:

- SmartCLOSE
 - SmartCLOSE Administrator
 - SmartCLOSE User
- LoanMagic for Borrowers
 - LoanMagic for Borrowers Administrator
 - LoanMagic for Borrowers User
- Role Administration
- AutoPrep

The 'Package Types' section is highlighted with a green box and contains the following items:

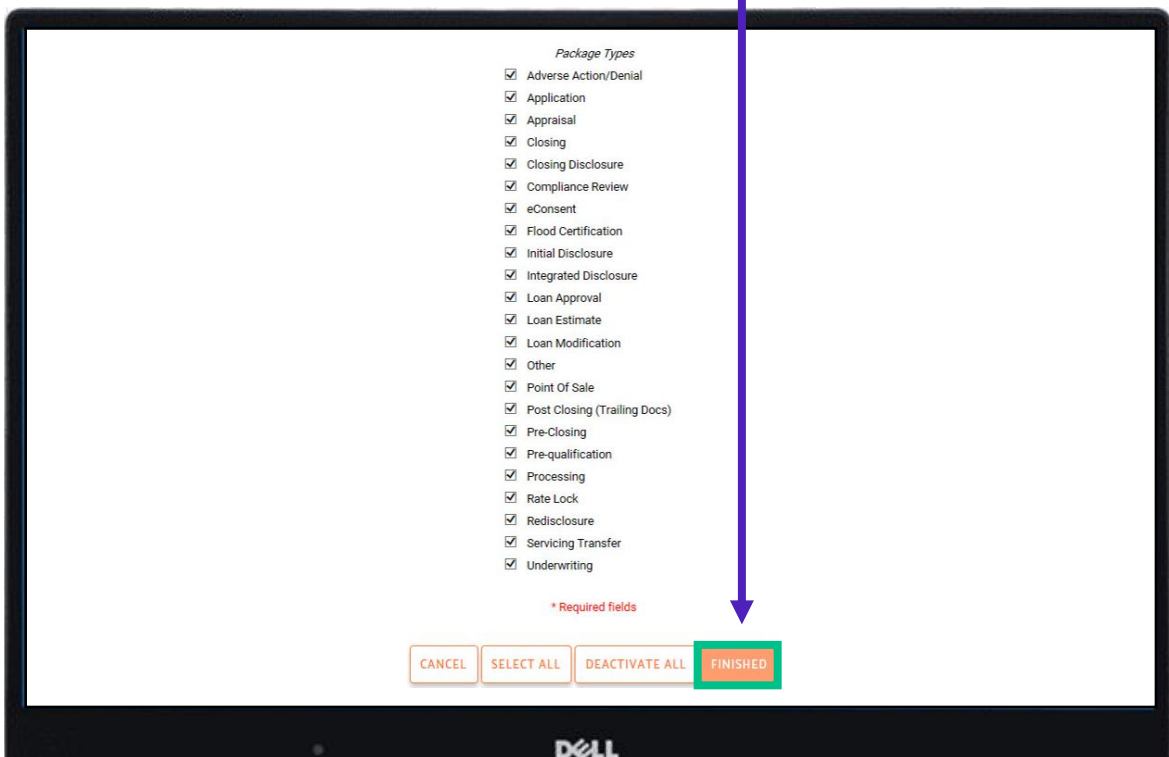
- Adverse Action/Denial
- Application
- Appraisal
- Closing
- Closing Disclosure
- Compliance Review
- eConsent
- Electronic Note
- Flood Certification
- Initial Disclosure
- Integrated Disclosure
- Loan Approval
- Loan Estimate



User Account Set-Up

Finished

When complete, you MUST click finished at the bottom and return to the dashboard for your changes to take place.



Package Types

- Adverse Action/Denial
- Application
- Appraisal
- Closing
- Closing Disclosure
- Compliance Review
- eConsent
- Flood Certification
- Initial Disclosure
- Integrated Disclosure
- Loan Approval
- Loan Estimate
- Loan Modification
- Other
- Point Of Sale
- Post Closing (Trailing Docs)
- Pre-Closing
- Pre-qualification
- Processing
- Rate Lock
- Redisclosure
- Servicing Transfer
- Underwriting

* Required fields

CANCEL SELECT ALL DEACTIVATE ALL **FINISHED**

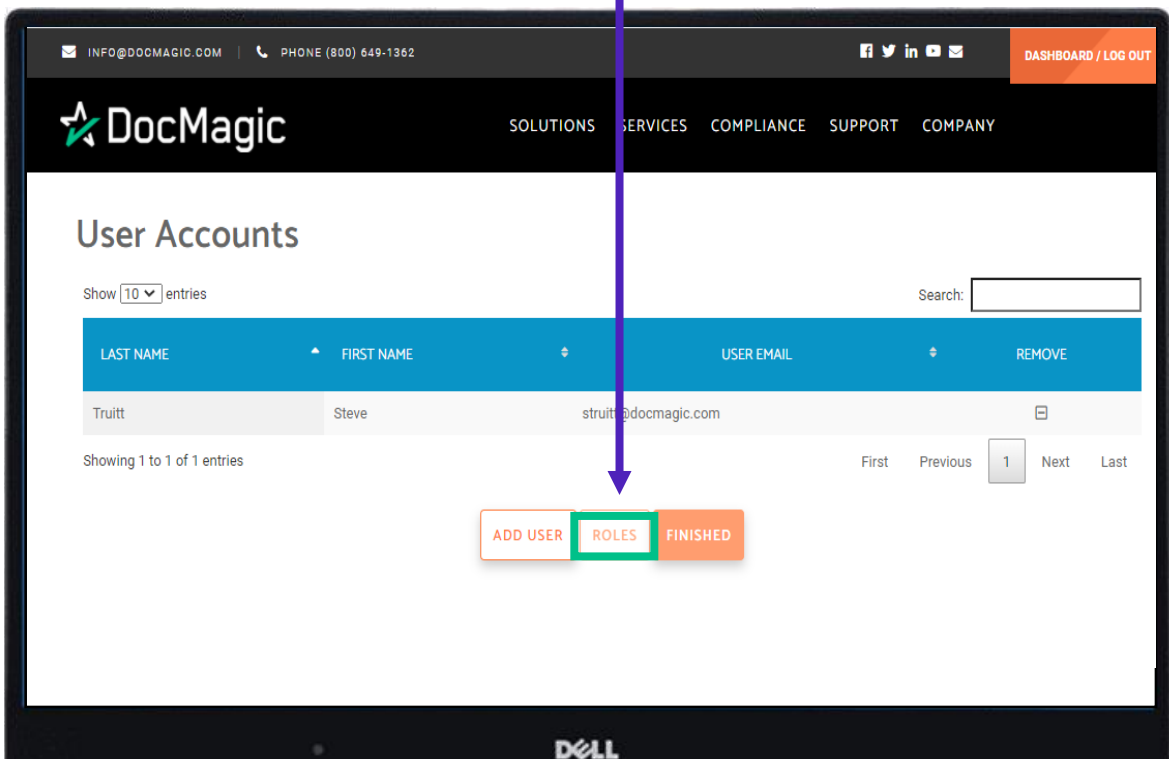
DELL



User Account Set-Up

User Roles

Back on the User Accounts page,
click here to go to User Roles.



The screenshot shows the DocMagic User Accounts page. At the top, there is a navigation bar with the DocMagic logo and menu items: SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, and COMPANY. On the right, there are social media icons and a 'DASHBOARD / LOG OUT' button. Below the navigation bar, the page title 'User Accounts' is displayed. There is a search bar and a 'Show 10 entries' dropdown. A table with columns 'LAST NAME', 'FIRST NAME', 'USER EMAIL', and 'REMOVE' contains one entry for 'Trutt, Steve' with email 'strutt@docmagic.com'. Below the table, there are pagination controls: 'Showing 1 to 1 of 1 entries', 'First', 'Previous', '1', 'Next', and 'Last'. At the bottom of the page, there are three buttons: 'ADD USER', 'ROLES', and 'FINISHED'. A blue arrow points from the callout box to the 'ROLES' button.

If you are going to be adding multiple users with same or similar privileges or functions, you can use roles to streamline the process.



User Account Set-Up

User Roles

This page displays all the Roles you have previously created.

The screenshot shows the DocMagic user interface for managing roles. At the top, there is a navigation bar with the DocMagic logo, menu items (SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, COMPANY), and buttons for 'REQUEST A DEMO' and 'DASHBOARD / LOG OUT'. Below the navigation bar, a message reads: 'Please select the desired role below or add a new role.' There is a 'Show 10 entries' dropdown and a search box. A table lists three roles:

NAME	DESCRIPTION	REMOVE
Base User	Access+to+SmartREGISTRY+for+day+to+day.	<input type="checkbox"/>
DocMagic Tech Support	Role for SmartREGISTRY and eVault access for customers i...	<input type="checkbox"/>
Loan Officer	orig	<input type="checkbox"/>

Below the table, it says 'Showing 1 to 3 of 3 entries' and includes pagination links: 'First', 'Previous', '1', 'Next', 'Last'. At the bottom of the table area, there are two buttons: 'ADD ROLE' and 'FINISHED'. The Dell logo is visible at the bottom of the screen.

It will be blank if you have never added any roles.



User Account Set-Up

User Roles

Click on a Name to edit that Role.

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

DocMagic SOLUTIONS SERVICES COMPLIANCE SUPPORT COMPANY REQUEST A DEMO DASHBOARD / LOG OUT

Please select the desired role below or add a new role.

Show 10 entries Search:

NAME	DESCRIPTION	REMOVE
Base User	Access+to+SmartREGISTRY+for+day+to+day.	☒
DocMagic Tech Support	Role for SmartREGISTRY and eVault access for customers i...	☒
Loan Officer	orig	☒

Showing 1 to 3 of 3 entries First Previous 1 Next Last

ADD ROLE FINISHED

Click Add Role to create a new Role. Editing and adding a user role are very similar.



User Account Set-Up

User Roles

Start by entering the Role name and Description.

The screenshot shows a web interface for editing user information. At the top, it says "Edit User Information:". Below that is a section titled "Role Information" with two fields: "Name" containing "PROCESSOR" and "Description" containing "Will handle all data integration and entry in DocMagic Online". Below this is a section titled "Privileges" with a list of checkboxes. A blue arrow points from the "Name" field to the "Privileges" section.

Edit User Information:

Role Information

* Name: PROCESSOR

* Description: Will handle all data integration and entry in DocMagic Online

Privileges

- Manage Users
- Manage Plans
- Manage Forms
- Manage Plan Sorting
- Manage Lender Profile
- Manage Loan Defaults
- Generate Reports
- DocMagic
 - Process Documents
 - Manage Alternate Lenders
- Document Files Administrator
- DocMaster Document Viewer
 - Docmaster Email enabled
 - Allow attachments
 - Allow annotations
- eSign Console
 - eSign Console Admin
 - eSign - Loan Originator
 - eSign Reviewer

Check the privileges that the role will be granted. Remember to scroll down to see all privileges.



User Account Set-Up

User Roles

"Select All" checks every box. "Deactivate All" unchecks them.

DocMagic SOLUTIONS SERVICES COMPLIANCE SUPPORT COMPANY REQUEST A DEMO DASHBOARD / LOG OUT

- Point Of Sale
- Post Closing (Trailing Docs)
- Pre-Closing
- Pre-qualification
- Processing
- Rate Lock
- Redisclosure
- Servicing Transfer
- Underwriting
- Uniform Residential Loan Application

* Required fields

CANCEL SELECT ALL DEACTIVATE ALL FINISHED

DELL

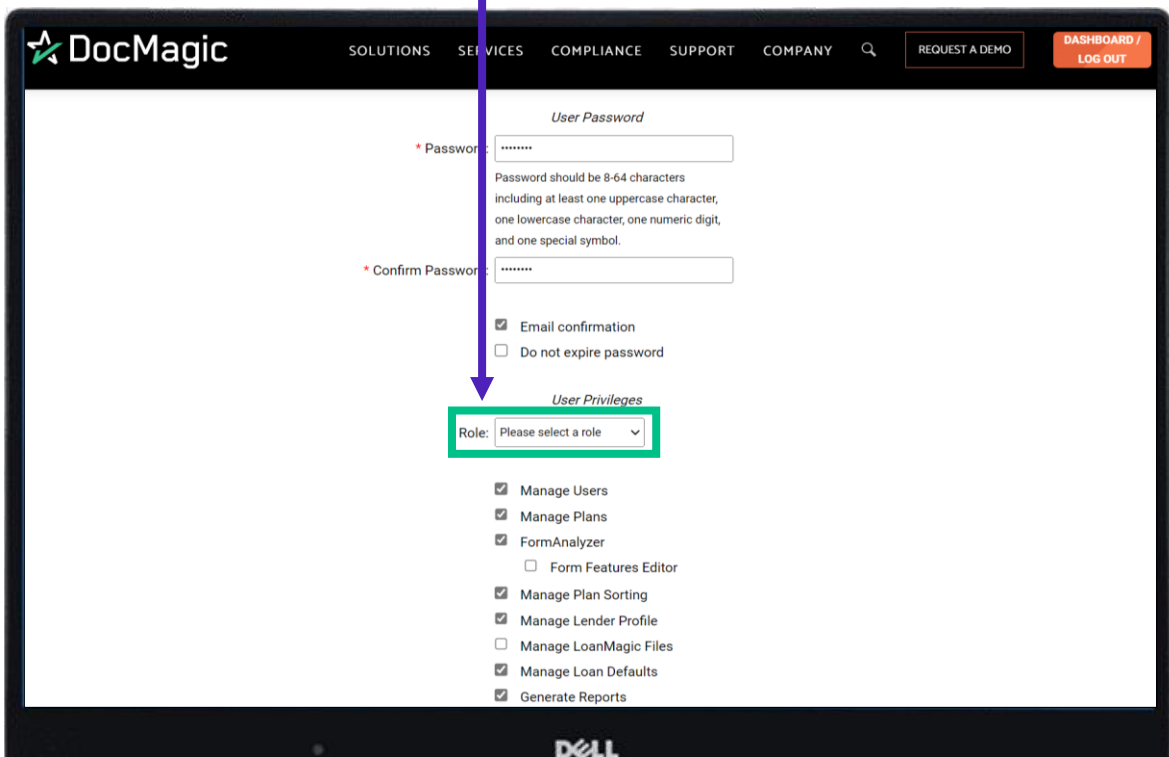
Click the Finished button to save the selected privileges to the Role.



User Account Set-Up

User Roles

When you create a new user or edit an existing one, you have the option to select a desired role from this dropdown menu.



The screenshot shows the DocMagic user account setup interface. The top navigation bar includes 'SOLUTIONS', 'SERVICES', 'COMPLIANCE', 'SUPPORT', and 'COMPANY'. A search icon and a 'REQUEST A DEMO' button are also present. The main content area is titled 'User Password' and contains two password fields: '* Password' and '* Confirm Password'. Below these fields are two checkboxes: 'Email confirmation' (checked) and 'Do not expire password' (unchecked). The 'User Privileges' section is highlighted with a green box and contains a 'Role:' dropdown menu with the text 'Please select a role'. Below the dropdown is a list of privileges with checkboxes: 'Manage Users' (checked), 'Manage Plans' (checked), 'FormAnalyzer' (checked), 'Form Features Editor' (unchecked), 'Manage Plan Sorting' (checked), 'Manage Lender Profile' (checked), 'Manage LoanMagic Files' (unchecked), 'Manage Loan Defaults' (checked), and 'Generate Reports' (checked). The Dell logo is visible at the bottom of the screen.

Remember to click Finished at the bottom of the page to save changes.

