

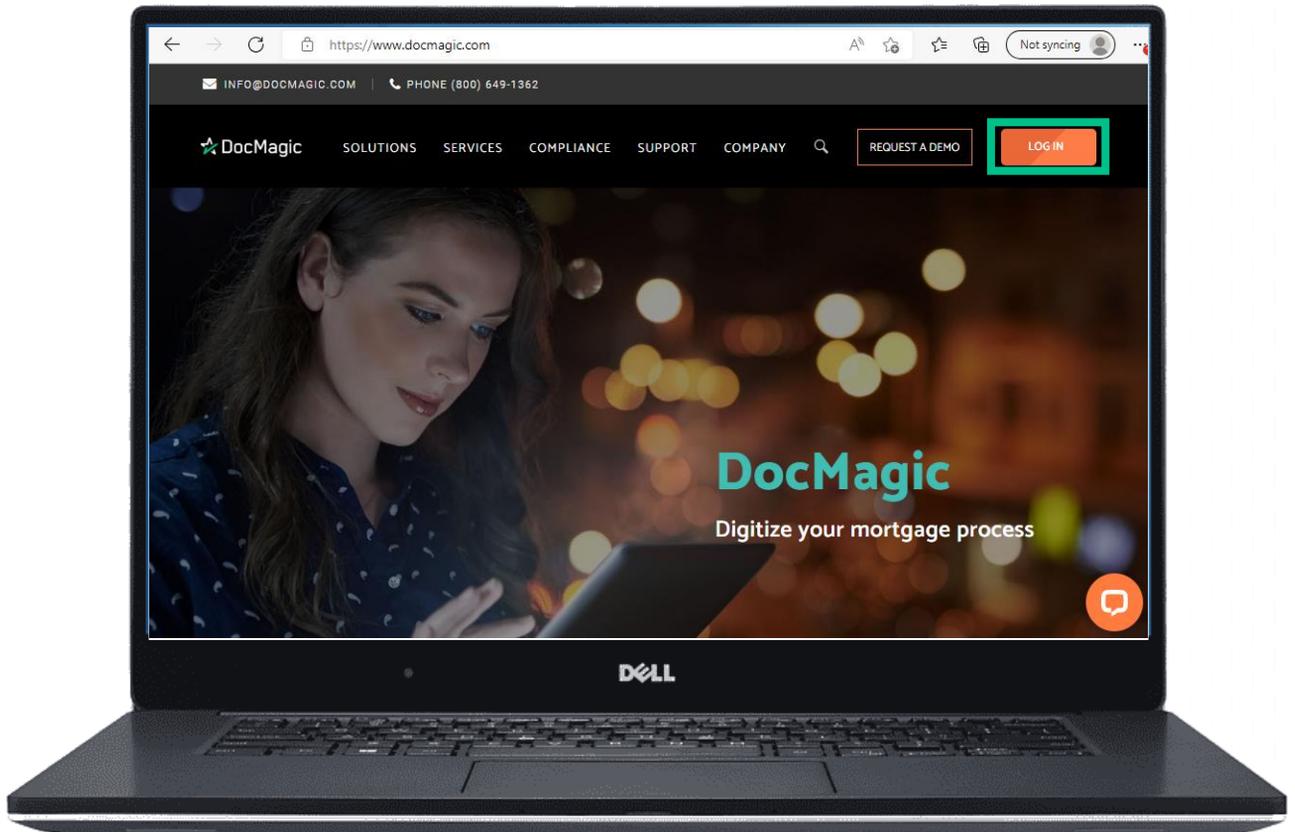


User Account Set-up

User Account Set-Up

Navigating to User Account Set-Up

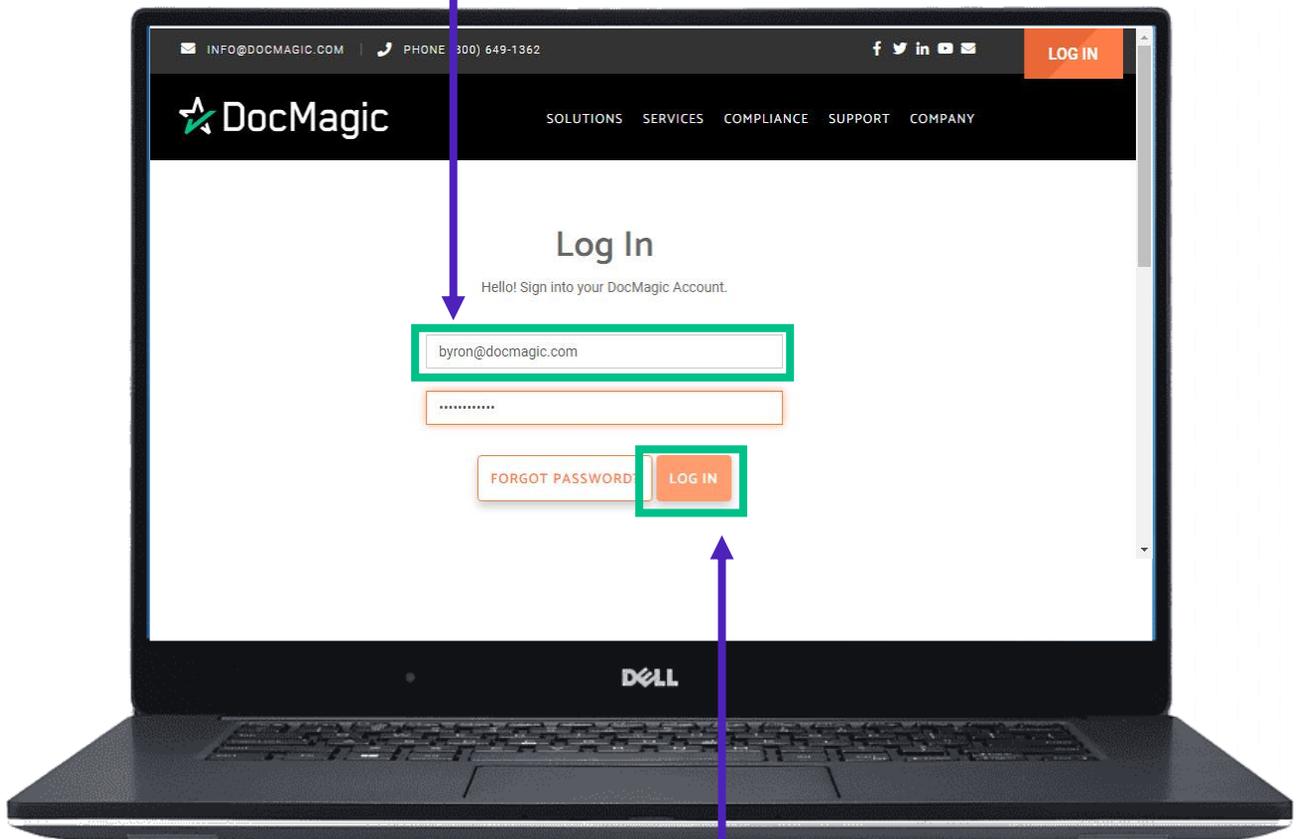
Go to www.docmagic.com



User Account Set-Up

Navigating to User Account Set-Up

Login with your
email and
password.



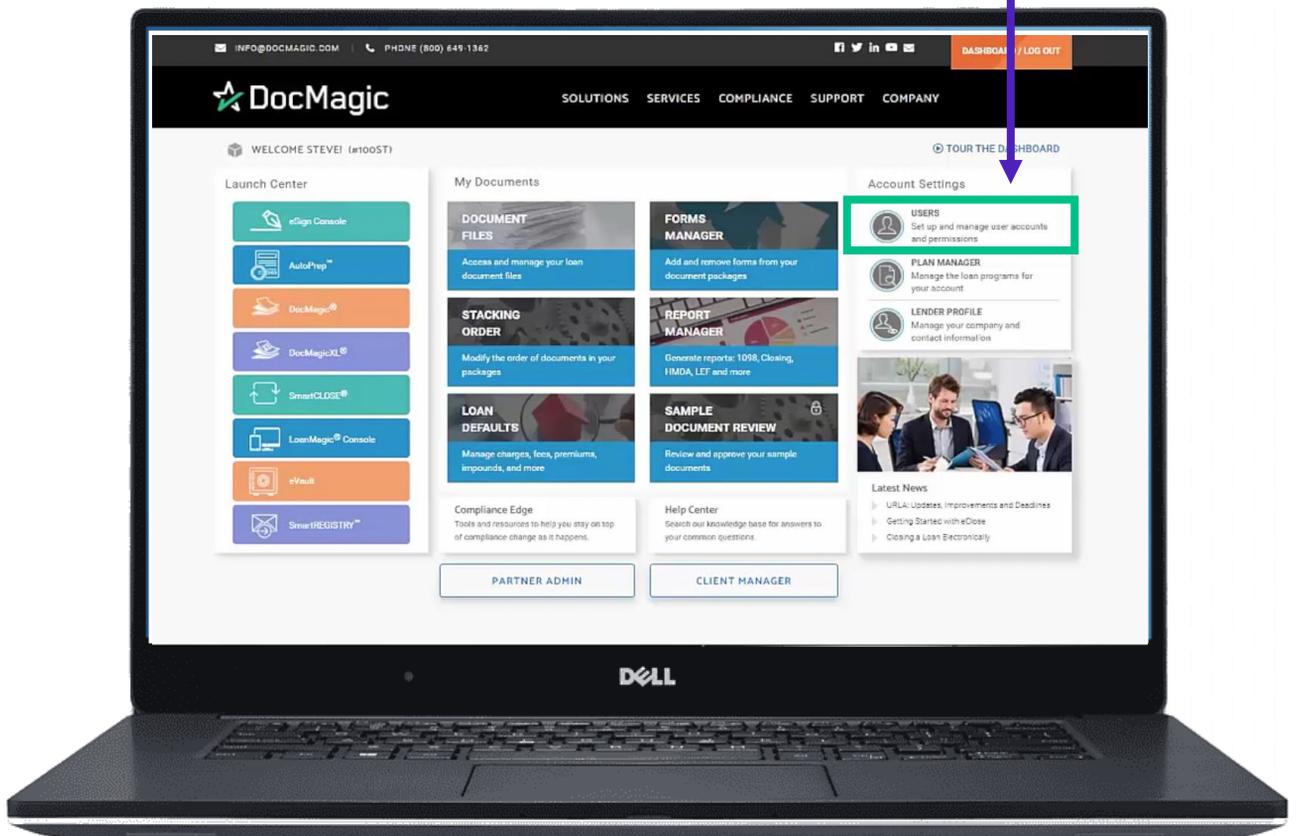
Click "LOG IN"



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 shows 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 is highlighted, and the text box above points to these 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.

The screenshot shows the DocMagic User Accounts management interface. At the top, there is a navigation bar with the DocMagic logo 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 page title 'User Accounts' is displayed. A 'Show 10 entries' dropdown and a search box are visible. The main content is a table with the following columns: LAST NAME, FIRST NAME, USER EMAIL, and REMOVE. Each column header has a small green square containing a sort arrow. The table contains six rows of user data. The DELL logo is visible at the bottom of the screen.

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	



User Account Set-Up

User Accounts

Click here to remove a user.

The screenshot shows the DocMagic User Accounts management interface. 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 this 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. One user, Steve Truitt (struitt@docmagic.com), is listed. Below the table are pagination controls (First, Previous, 1, Next, Last) and three buttons: ADD USER, ROLES, and FINISHED. A purple arrow points from the "REMOVE" button in the table to the callout box above, and another purple arrow points from the "ADD USER" button to the callout 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.

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

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

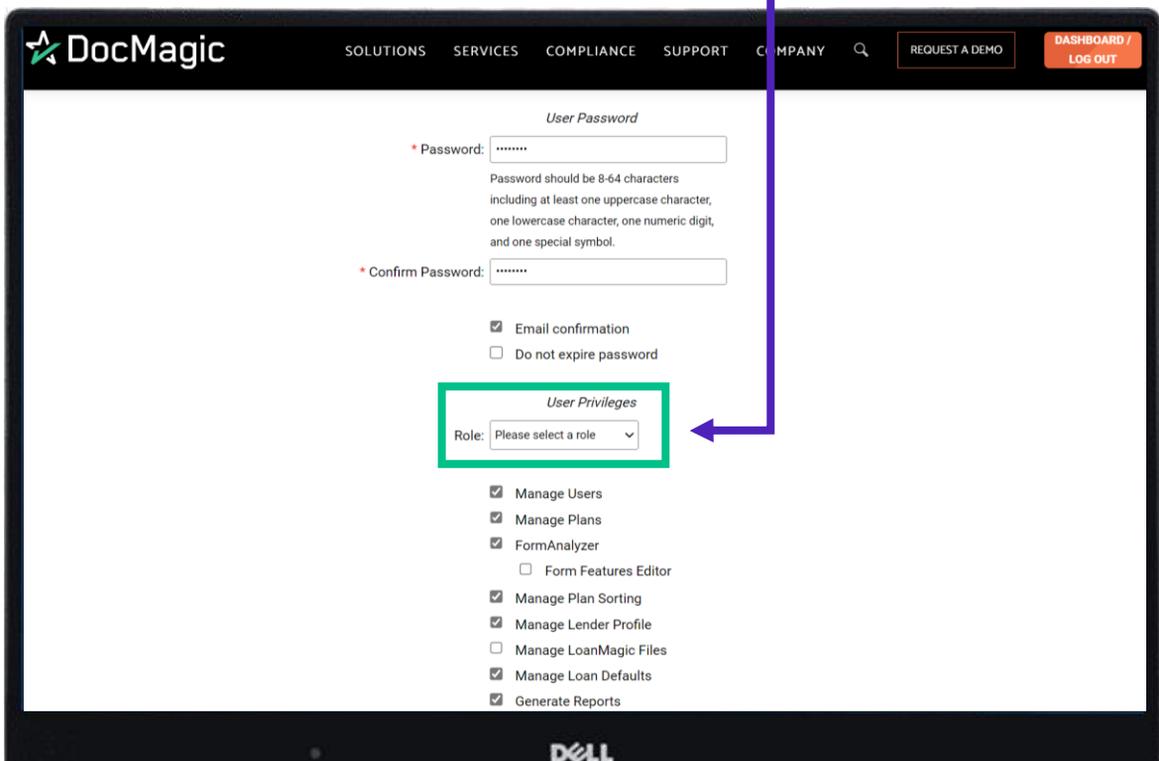
You'll have to enter a password for the new User. We recommend entering a temporary password that the new user can change once they receive a confirmation e-mail. Check "Email Confirmation" to enable this option.



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.



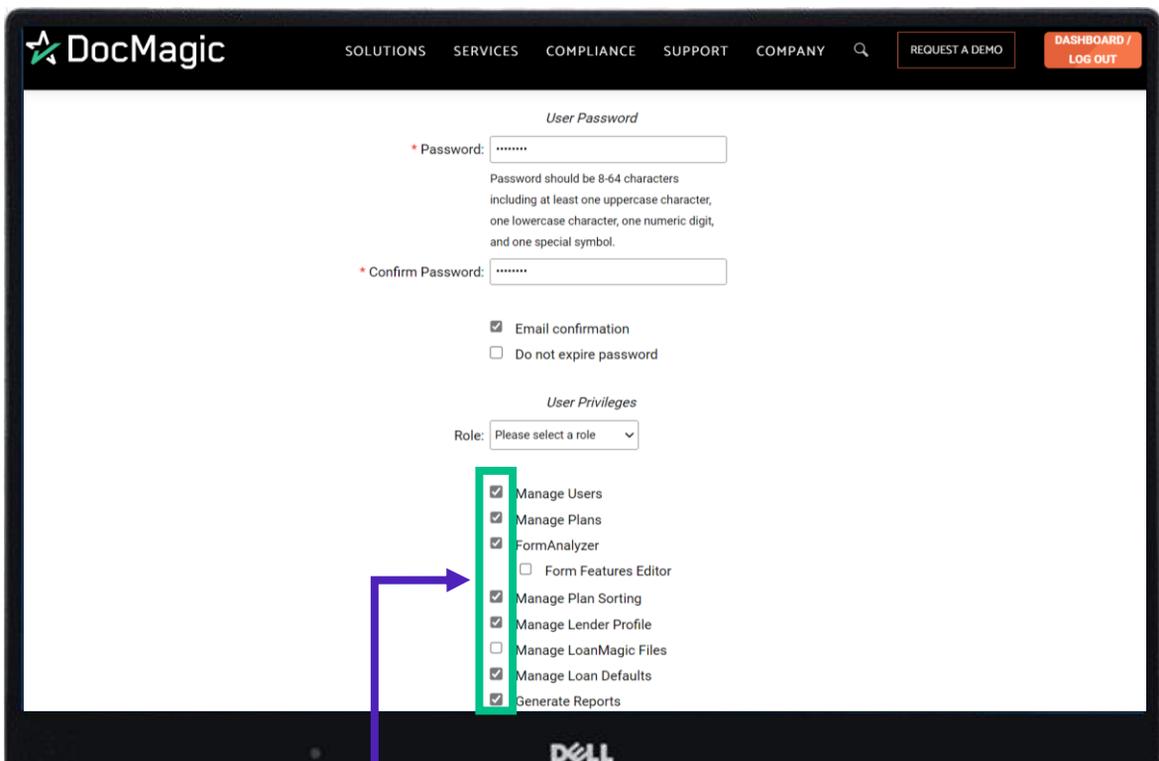
The screenshot shows the DocMagic user account setup interface. The page has a dark header with the DocMagic logo and navigation links: SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, and COMPANY. There are also buttons for REQUEST A DEMO and DASHBOARD / LOG OUT. The main content area is titled "User Password" and contains fields for Password and Confirm Password, along with a password strength requirement: "Password should be 8-64 characters including at least one uppercase character, one lowercase character, one numeric digit, and one special symbol." Below the password fields are two checkboxes: "Email confirmation" (checked) and "Do not expire password" (unchecked). The "User Privileges" section is highlighted with a green box and has an arrow pointing to it from the text above. It features a "Role:" dropdown menu with the text "Please select a role" and a list of permissions 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 monitor frame.



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. At the top, there is a navigation bar with links for SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, and COMPANY, along with a search icon and buttons for REQUEST A DEMO and DASHBOARD / LOG OUT. The main content area is divided into two sections: "User Password" and "User Privileges".

User Password Section:

- * Password:** A text input field with a masked password (.....). Below it, a note states: "Password should be 8-64 characters including at least one uppercase character, one lowercase character, one numeric digit, and one special symbol."
- * Confirm Password:** A text input field with a masked password (.....).
- Two checkboxes: Email confirmation and Do not expire password.

User Privileges Section:

- Role:** A dropdown menu with the text "Please select a role".
- A list of privileges with checkboxes: 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 "Generate Reports" checkbox to a text box below the screenshot.

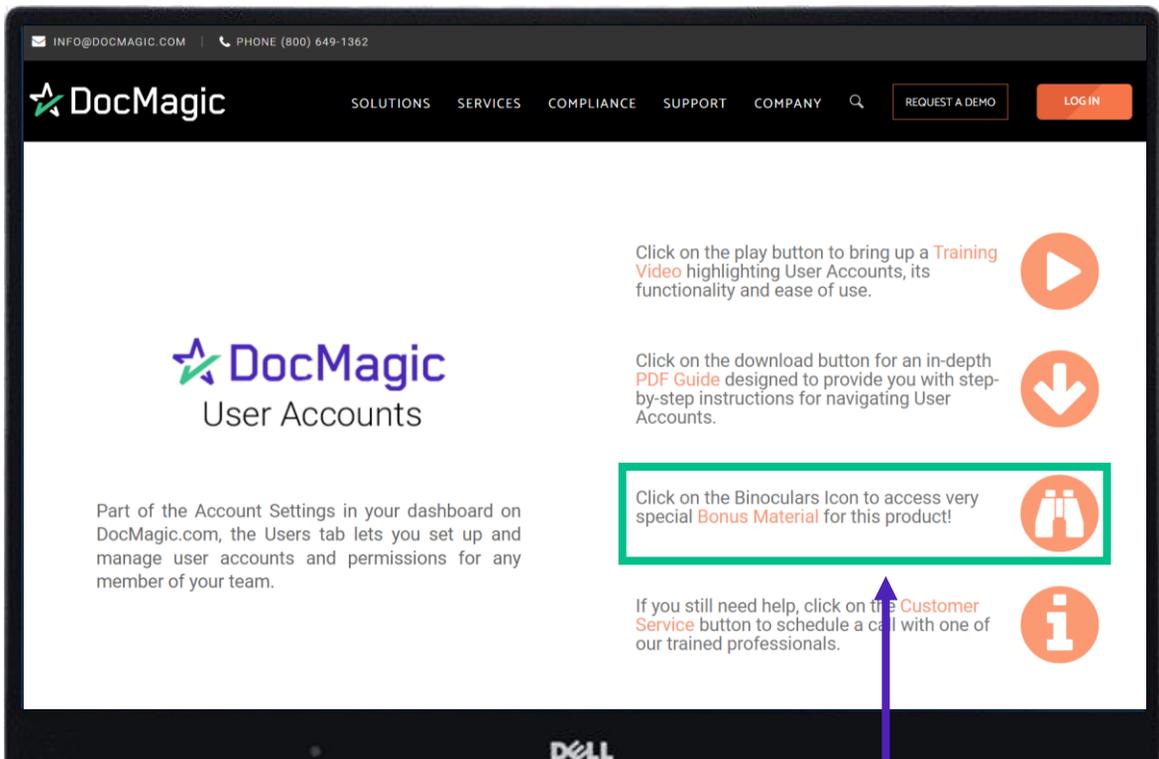
Checking the box gives the user that privilege. Leaving the box unchecked denies the user of that privilege.



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.



The screenshot shows the DocMagic website interface. At the top, there is a navigation bar with the DocMagic logo, menu items (SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, COMPANY), a search icon, and buttons for 'REQUEST A DEMO' and 'LOGIN'. The main content area is titled 'DocMagic User Accounts'. It includes a paragraph: 'Part of the Account Settings in your dashboard on DocMagic.com, the Users tab lets you set up and manage user accounts and permissions for any member of your team.' To the right, there are four call-to-action items, each with an icon and a description:

- Training Video:** Click on the play button to bring up a Training Video highlighting User Accounts, its functionality and ease of use. (Play button icon)
- PDF Guide:** Click on the download button for an in-depth PDF Guide designed to provide you with step-by-step instructions for navigating User Accounts. (Download button icon)
- Bonus Material:** Click on the Binoculars Icon to access very special Bonus Material for this product! (Binoculars icon, highlighted with a green box)
- Customer Service:** If you still need help, click on the Customer Service button to schedule a call with one of our trained professionals. (Information icon)

A blue arrow points from the Binoculars icon callout box down to a text box below the screenshot.

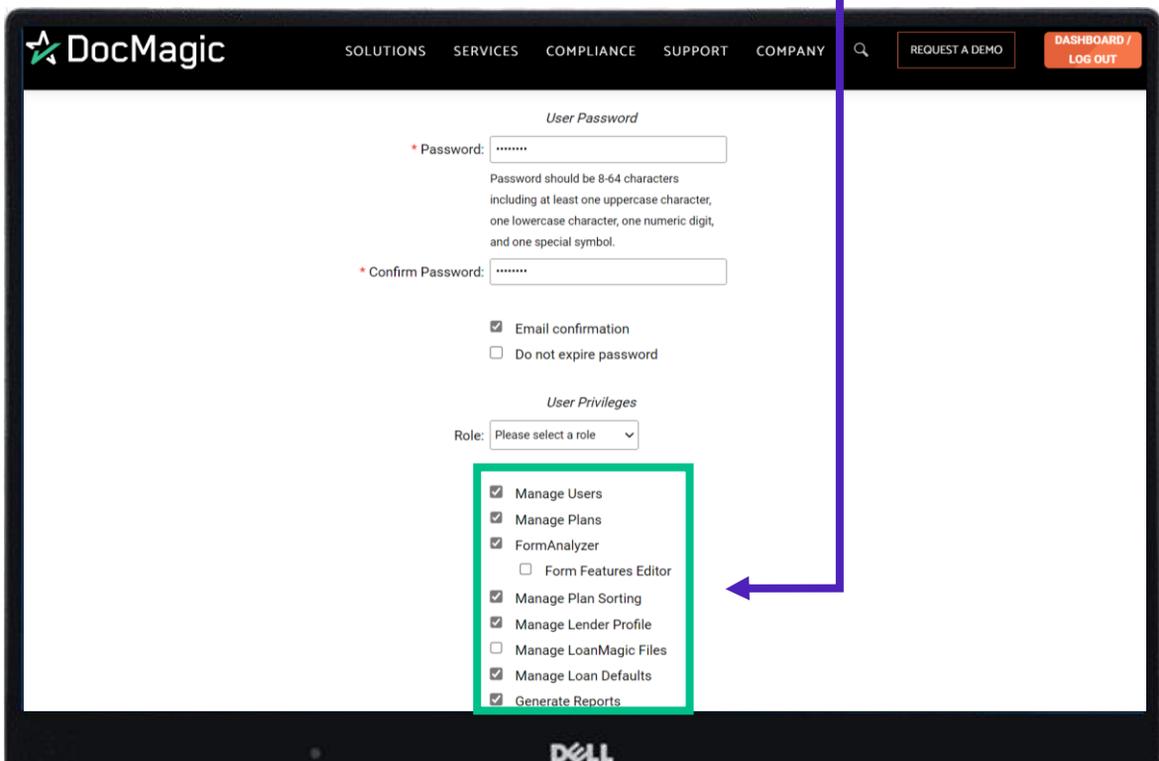
This sheet can be accessed any time by clicking [here](#) on the Product Training Page.



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 with masked characters. 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 this 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

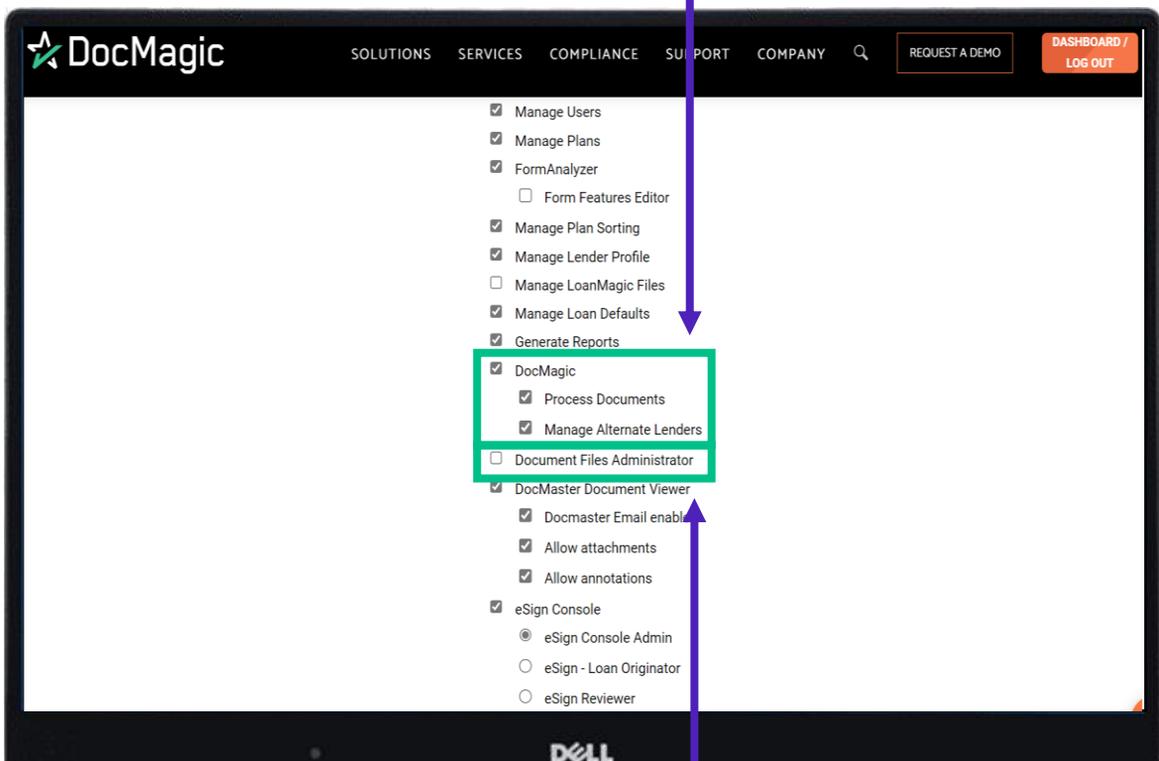
A blue arrow points from the text box above to the "Generate Reports" checkbox in the list.



User Account Set-Up

User Privileges Explained

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



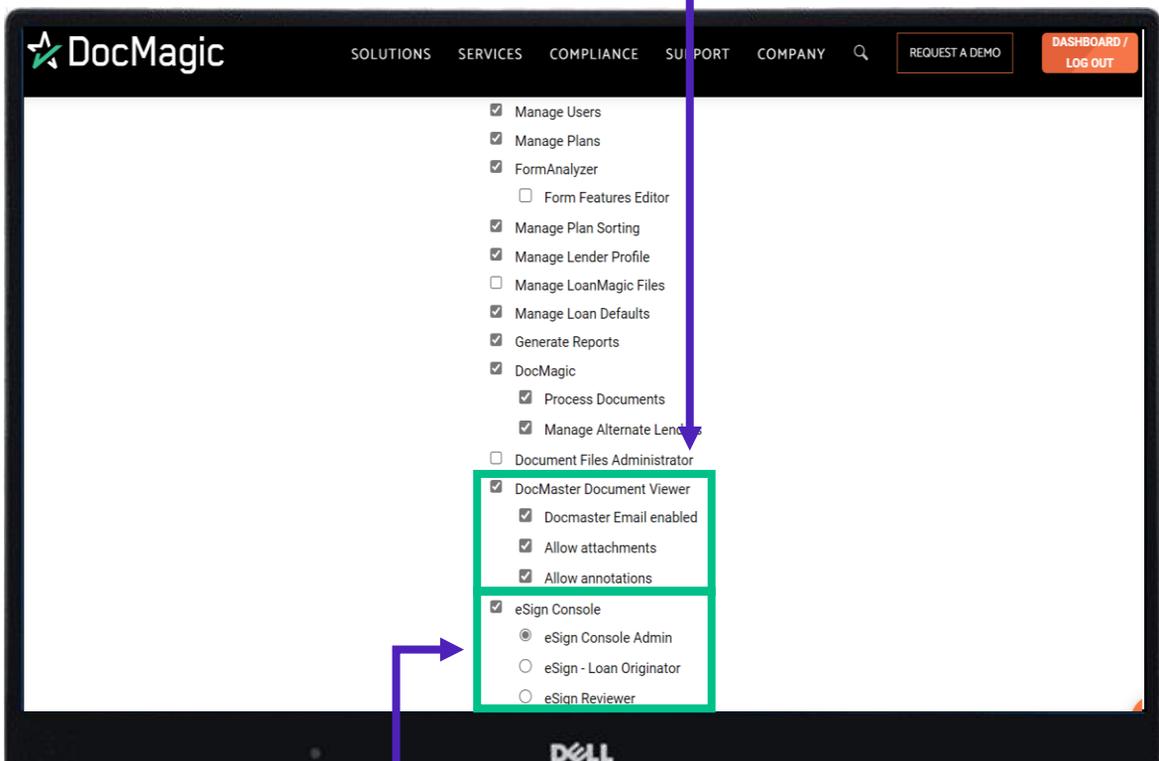
“Document Files Administrator” allows the user to access and manage loan documents via [Document Files](#).



User Account Set-Up

User Privileges Explained

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



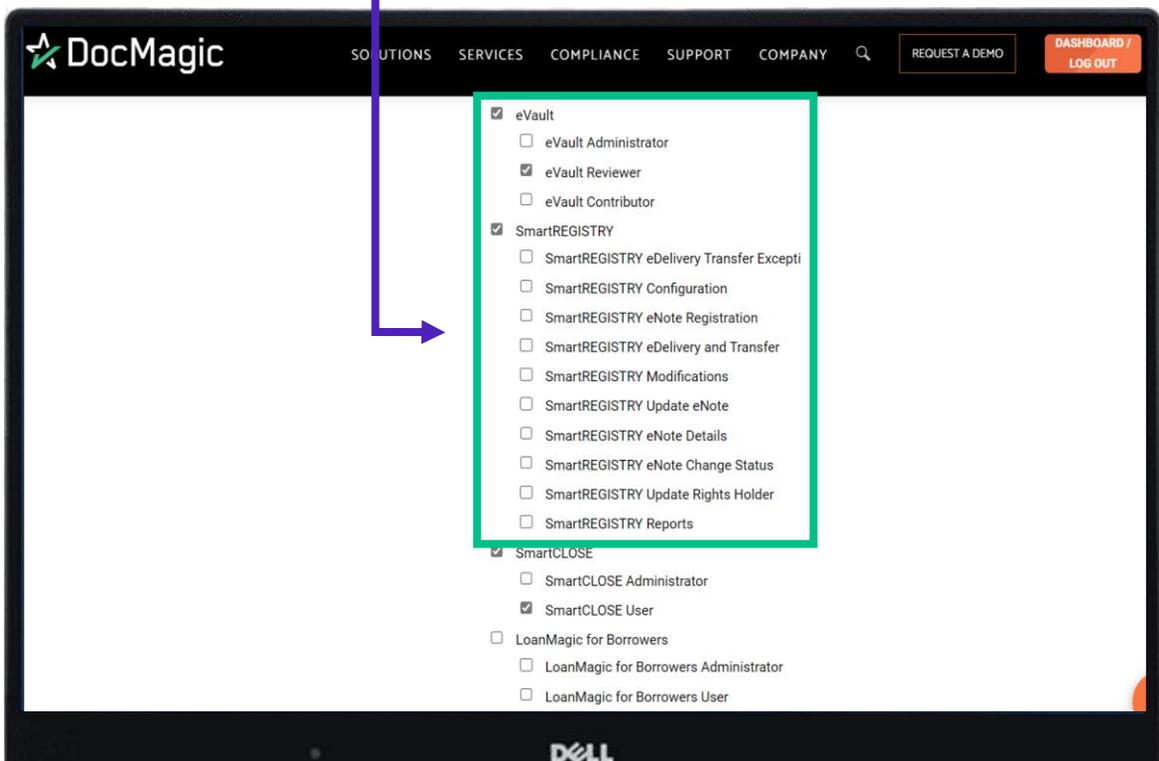
The [eSign Console](#) allows the user to access and manage loan document packages that have been processed within the last 90 days.



User Account Set-Up

User Privileges Explained

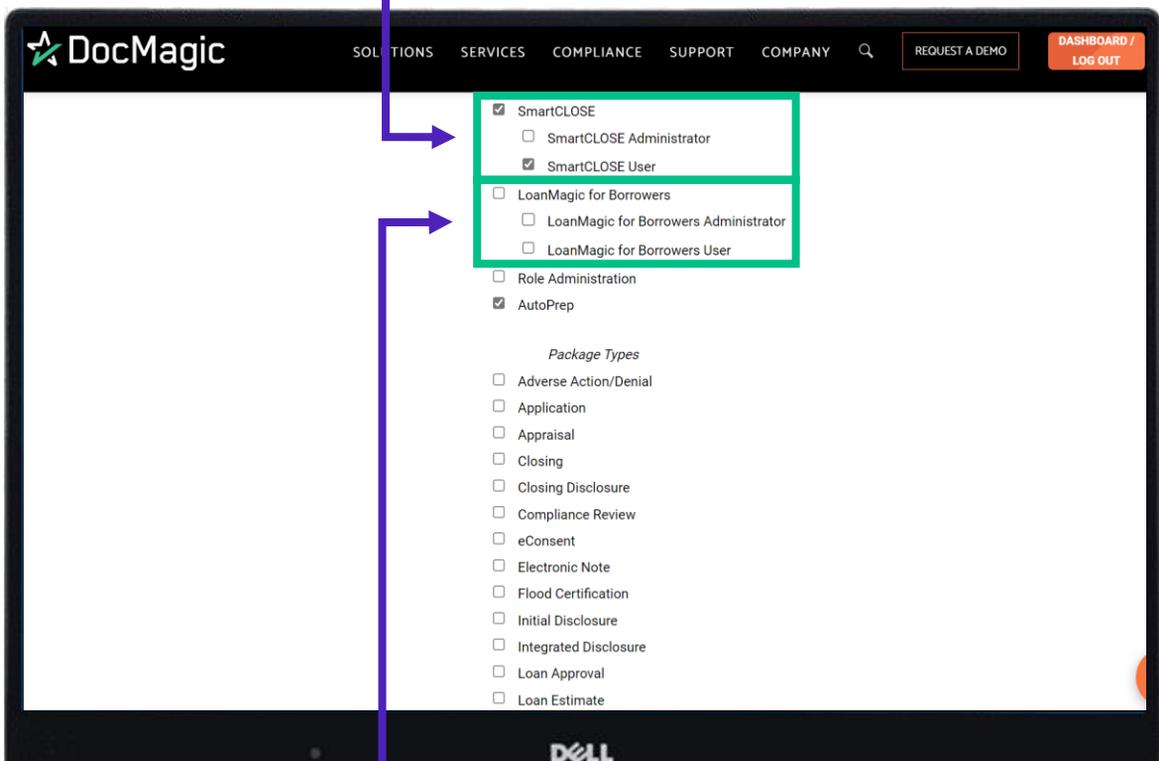
[eVault](#) and [SmartRegistry](#) are used to manage and transfer electronic loan files.



User Account Set-Up

User Privileges Explained

SmartCLOSE is a closing portal between lenders and settlement agents.



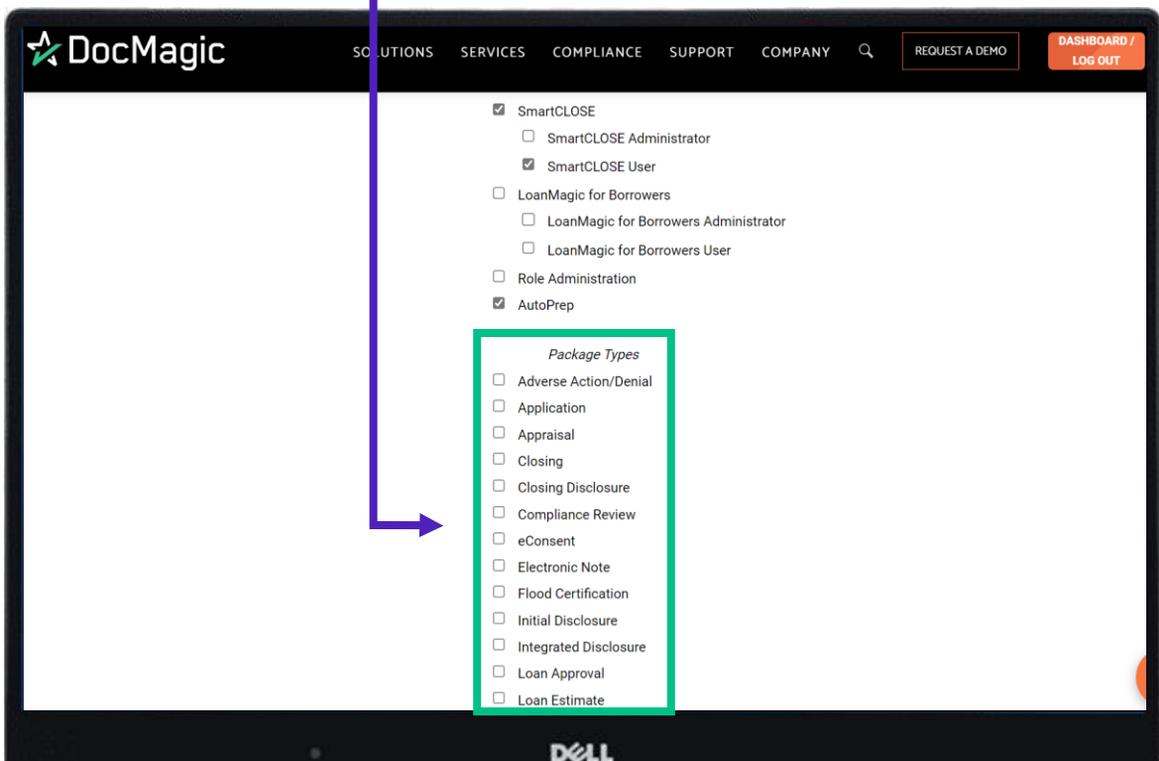
LoanMagic is our app that allows borrowers to go through the loan process from their mobile device.



User Account Set-Up

Package Types

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



For a detailed explanation on package types, click on the Bonus Material / Binoculars on the [User Accounts](#) section of the Product Training Page, or click [here](#).



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

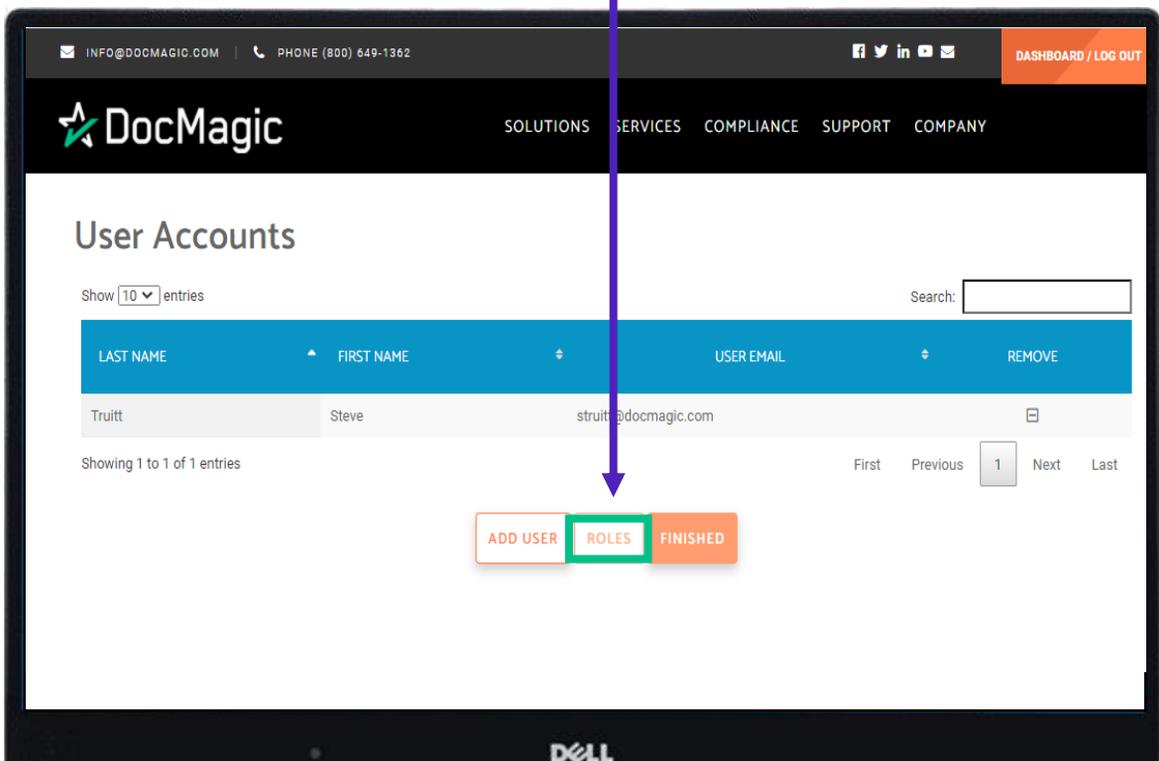
DELL



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. Below the navigation bar, the page title is "User Accounts". There is a search bar and a "Show 10 entries" dropdown. A table lists user accounts with columns for LAST NAME, FIRST NAME, USER EMAIL, and REMOVE. The table contains one entry for "Truitt, Steve" with email "struitt@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.

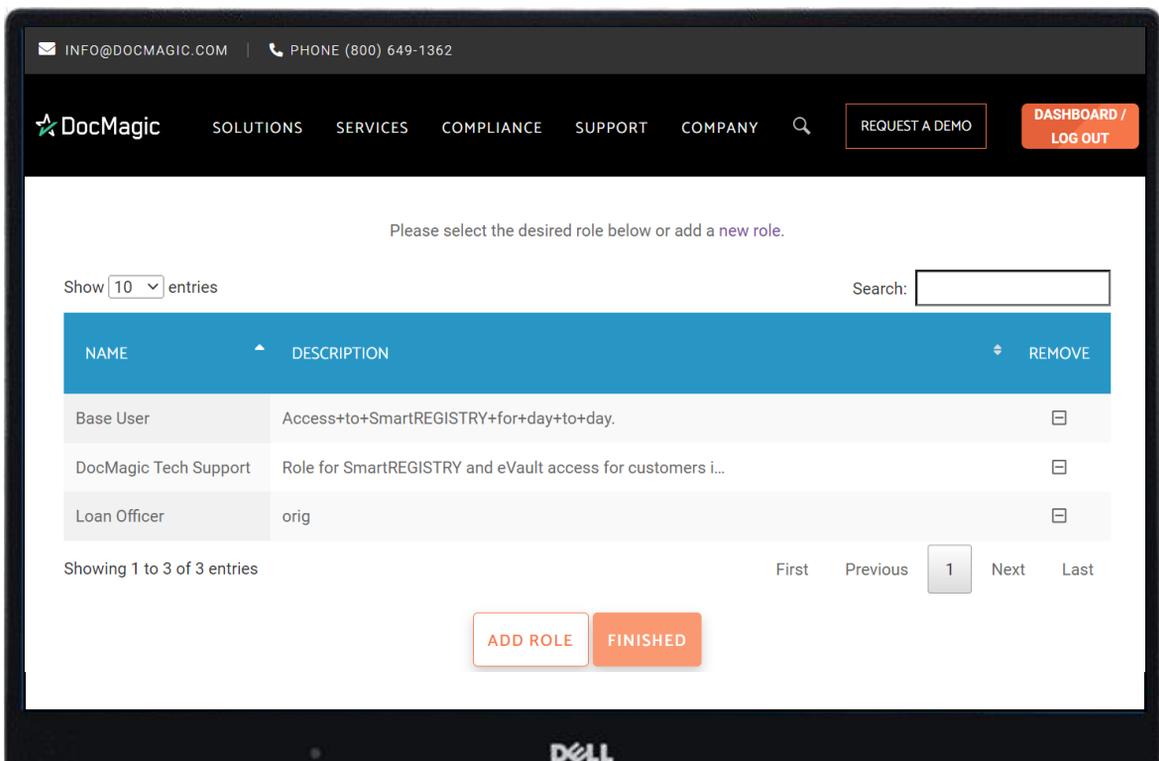
If you are going to be adding multiple users with same or similar privileges or functions, you can use roles to streamline the process.



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 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, a message reads: 'Please select the desired role below or add a new role.' The main content area features a table with columns for 'NAME', 'DESCRIPTION', and 'REMOVE'. The table contains three entries: 'Base User', 'DocMagic Tech Support', and 'Loan Officer'. Below the table, there are pagination controls showing 'Showing 1 to 3 of 3 entries' and buttons for 'First', 'Previous', '1', 'Next', and 'Last'. At the bottom of the page, there are two buttons: 'ADD ROLE' and 'FINISHED'.

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

DELL

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 input 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. The "Privileges" list includes: Manage Users, Manage Plans (checked), Manage Forms, Manage Plan Sorting, Manage Lender Profile, Manage Loan Defaults, Generate Reports, DocMagic (checked), Process Documents (checked), Manage Alternate Lenders (checked), Document Files Administrator, DocMaster Document Viewer (checked), Docmaster Email enabled (checked), Allow attachments (checked), Allow annotations (checked), eSign Console (checked), eSign Console Admin (checked), eSign - Loan Originator, and eSign Reviewer.

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](#)

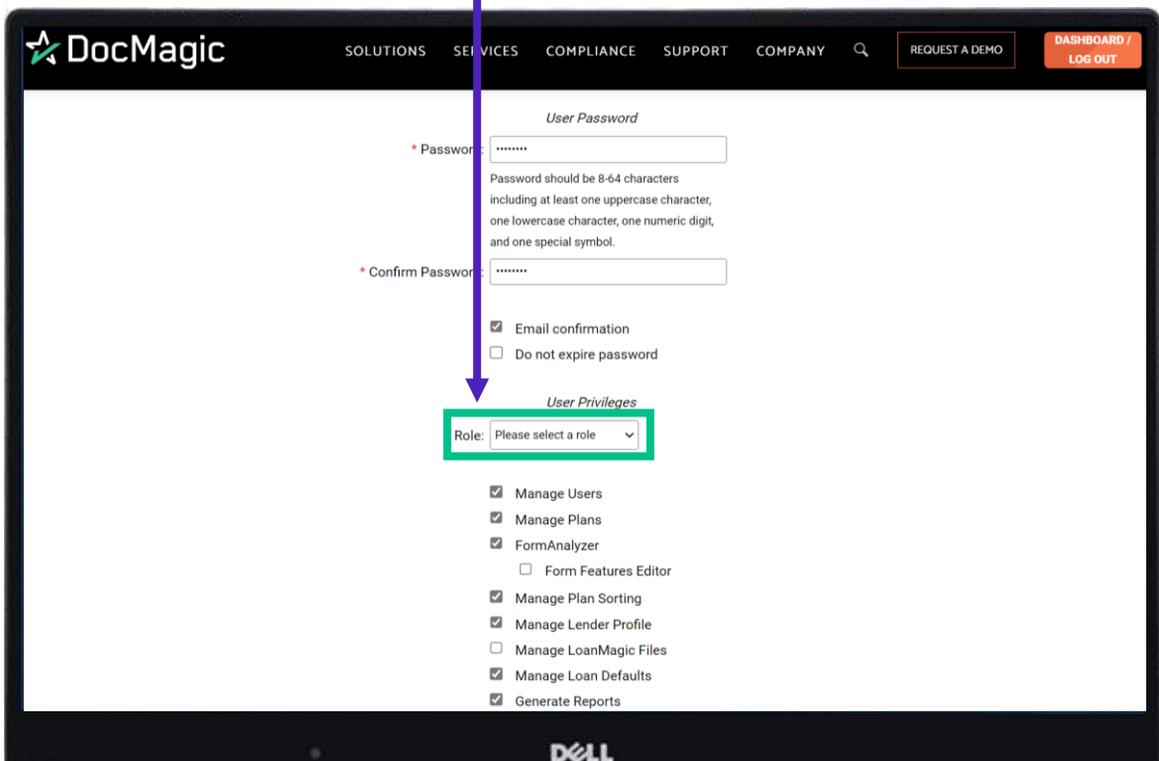
Click the Finished button to save the selected privileges to the Role.



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 page is titled "User Password" and "User Privileges". The "User Password" section includes fields for "Password" and "Confirm Password", both with asterisks indicating they are required. 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 features a "Role:" dropdown menu with the text "Please select a role" and a downward arrow. This dropdown menu is highlighted with a green box. 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 DocMagic logo is in the top left, and navigation links (SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, COMPANY) and buttons (REQUEST A DEMO, DASHBOARD / LOG OUT) are in the top right. A DELL logo is visible at the bottom center of the monitor frame.

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

