New Admin Guide

A helpful tool for your new Administration abilities with PPDocs

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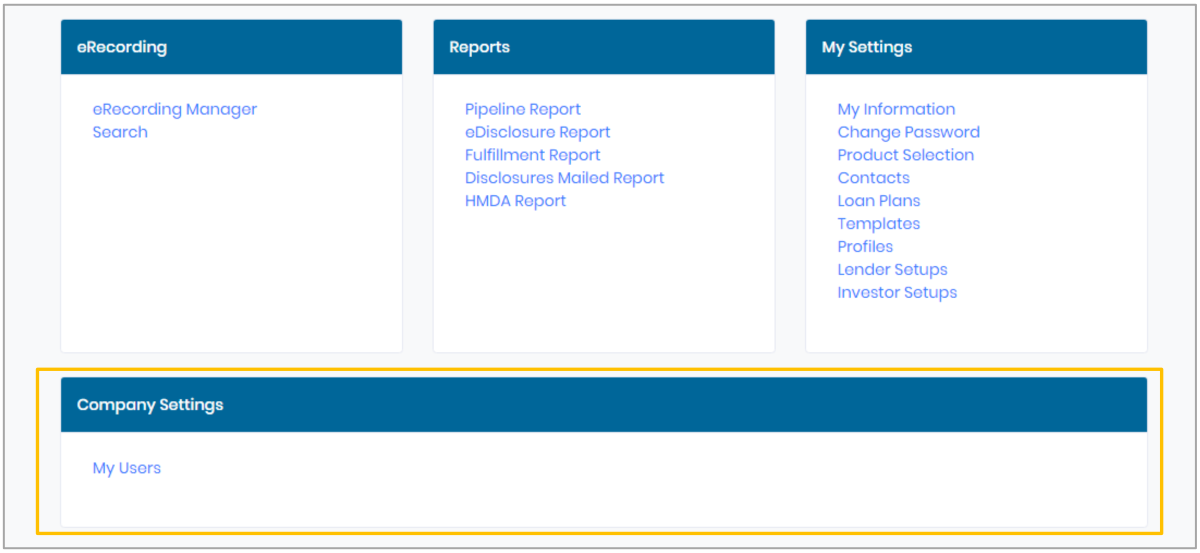
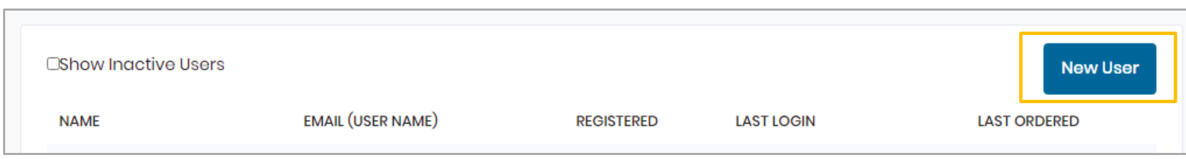
BRANCH ADMIN PRIVILEGES: Getting Started

Found under the **Company Settings** section at the bottom of your Account screen you'll see "My Users":



Adding a New User

- In your My Users there is a "New User" option on the Top Right:

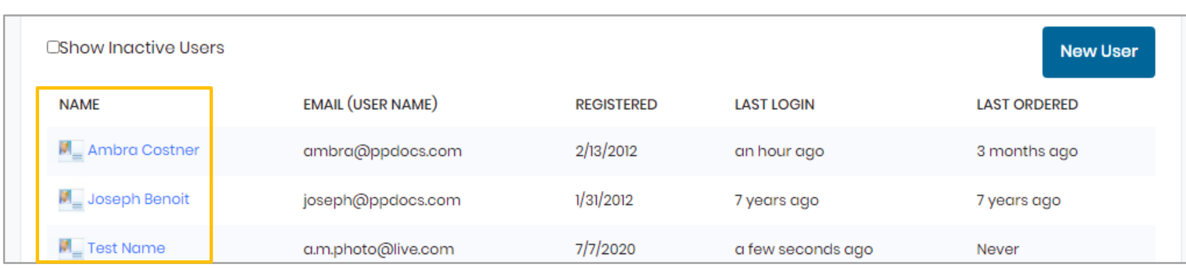


- Fill out all the required New User Information and "Add New"

- Your New User will need to validate their account from an invitation email sent from noreply@ppdocs.com.

- Your user will need to select the link in the email invitation, create their Password, and agree to terms and conditions. They are then able to start ordering documents with PPDocs!

- Once a user is validated any Admin in your branch will be able to see the user in the "My Users" section and move forward to adjust their permissions, casefile sharing, and more.

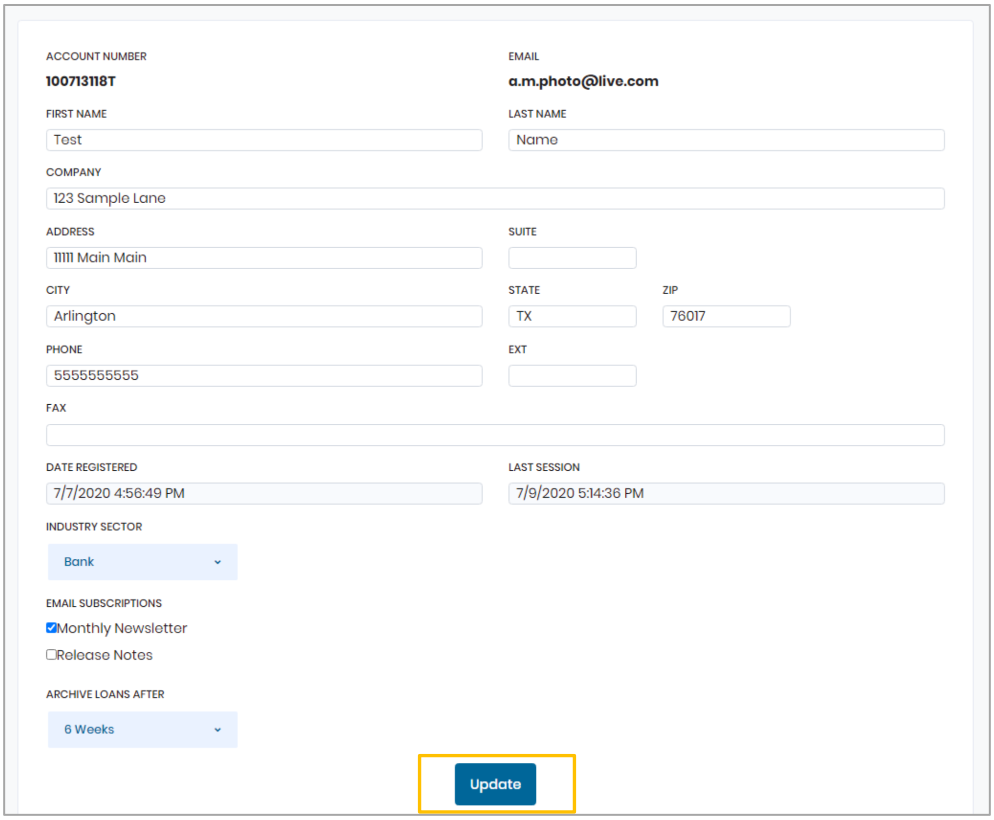


NOTE: Always have your new user check their Junk/Trash for email invitation.

USER INFORMATION

What to Edit?

Select your user's name. There you will see their account info, address, and subscriptions. ALL ***but*** the Account Number an email address are available to edit. Make sure you "UPDATE"!

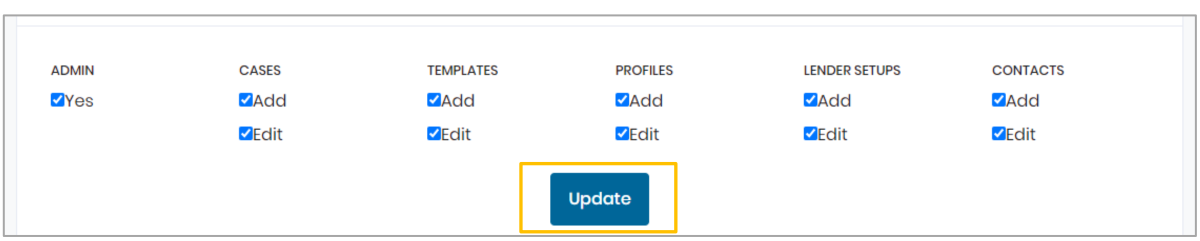


PERMISSIONS

<u>With any user you can adjust permissions, but what are "Permissions"?</u>

A Permission is what you allow a user to see, add, and/or edit within their account.

These boxes will allow/not allow your users to make changes or even add new items. These can can be changed at any time.



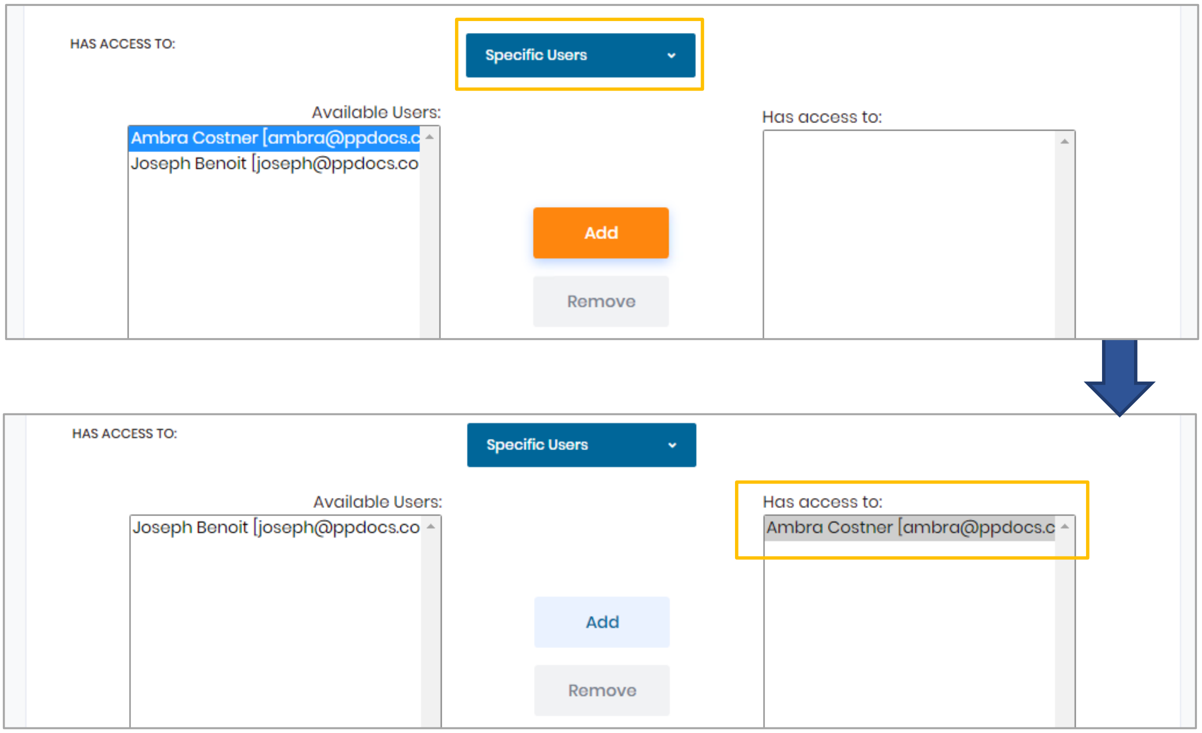
CASEFILE SHARING

You can specify your user's Casefile Sharing, but what is that?

Casefile Sharing is allowing users to see *other* user's Casefile Managers. This is helpful for users to assist other processors and/or cover their files while they are out.

It can be a Specific User(s), or it can be set to "All" which allows the user to see ALL Users in that branch.

Specific Users are chosen by selecting the left side user and "Add"



NOTE: Casefile Sharing is used for users in the same branch.
Contact support@ppdocs.com for any assistance with users as separate branches.

CONTACTS

All contacts can be edited, deleted, or shared. The dropdown menu will show the type of contact displayed (top left), but you can also search for specific contacts (top right).

- Each contact will have options on the right to either Edit, Delete, or Share (in that order)
- Hover over each icon to see what you're able to do/view and even see WHO shared the contact.

Settlement Agent

Add new contact

Show 10 entries

Search:

Company	Address	Contact	Phone	Email	Used	Edit		Sharing
Chapin Title Company	550 Hwy 377 North Ste 3, Whitesboro, TX 76273	Peggy Taylor	(903) 564-1555	whitesboro@chapintitle.com	11 years ago			Shared by Zack Boonjue
Your Title Company	123 Main Street, Suite 1, Arlington, TX 76017	Closing Dept.	(817) 555-1212	sarah@titlecompany.com	2 months ago			

NOTE: Those options will still be SPECIFC to your permissions. For example below the first contact (shown above) I will only be able to VIEW based on the permissions from another Admin.

- To Edit, select the BLUE pen icon.
- To Delete, select the RED trashcan icon.
- To Share, select the GREY cloud icon. A pop up will appear to select who to share your Contact with (Branch or Organization) and the permissions for the contact.
- Once a contact has been shared, the icon for sharing will show as a Shared Item.

Company	Address	Contact	Phone	Email	Used	Edit		Sharing
Chapin Title Company	550 Hwy 377 North Ste 3, Whitesboro, TX 76273	Peggy Taylor	(903) 564-1555	whitesboro@chapintitle.com	11 years ago			
Your Title Company	123 Main Street, Suite 1, Arlington, TX 76017	Closing Dept.	(817) 555-1212	sarah@titlecompany.com	2 months ago			
Your Title Company	123 Main Street, Suite 1, Arlington, TX 76010	Closing Dept.	(334) 555-1234	Title@titlecompany.com	2 months ago			

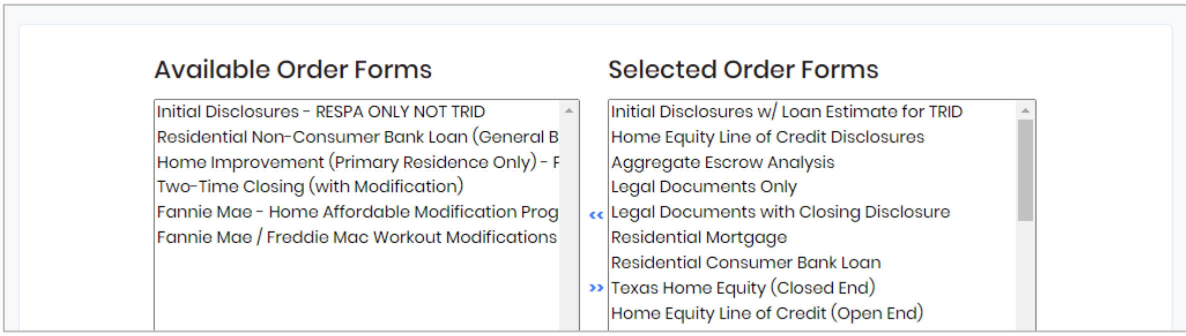
Additionally, the bottom of the page has options to convert the Contacts (address book) into Excel, PDF, Print, and more if necessary, for your internal information.

Showing 1 to 4 of 4 entries Copy CSV Excel PDF Print

PRODUCT DISPLAY SETUP

This section is strictly regarding what Order Forms (Products) the user will see when ordering documents. This can be limited to just a few order forms or have access to all of them.

NOTE: The Product Display can also be adjusted by the user themselves, but this section allows you to see what order forms each user sees when they order.



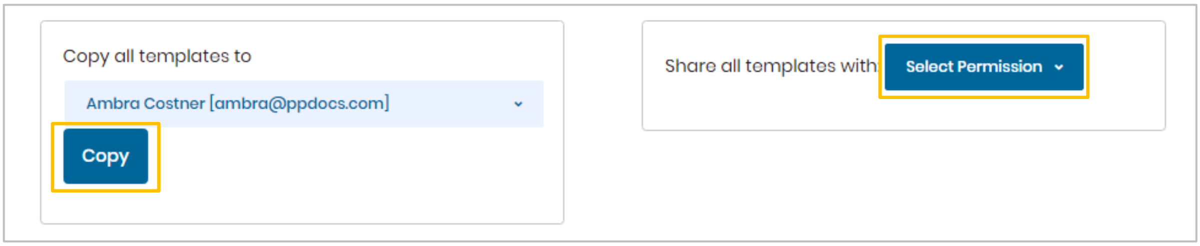
TEMPLATES

Templates are useful when you are not using a LOS to import.

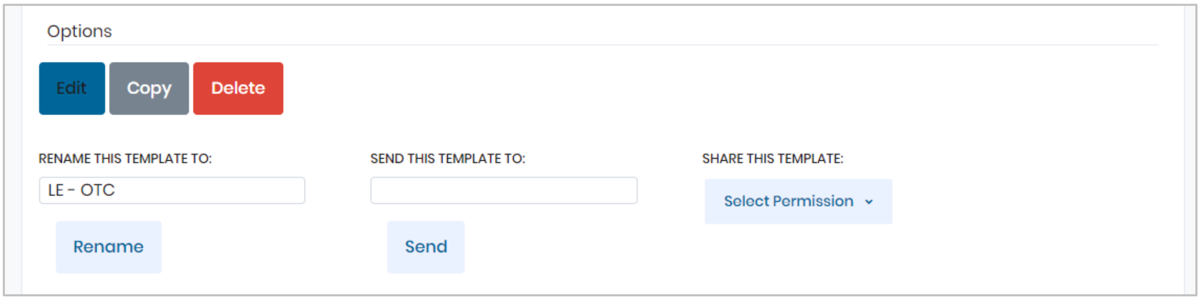
They can be shared between users, branches, and/or your complete organization. Additionally, a single template can be shared individually, or all templates can be shared at once.

To **COPY ALL** Templates to a User within your branch, select the user under "Copy all templates to" drop down menu and Copy.

To **SHARE ALL** templates with a Branch and/or Organization, select your preferred option under "Share all templates with:" dropdown menu.



To ***Edit, Rename, Send, Copy***, ***Delete***, or ***Share*** individually, select the template description, and the options below allow to either send to a user or to the entire branch/organization:



ppdocs,inc

PROFILES

Profiles are useful for automatically placing Lender, Funder, Trustee, MERS Org ID, LEI information, and more. Your Default Profile will have the basic information you've provided when you registered but can be changed at any time and can also be shared branch/organization wide.

PROFILE NAME	MODIFIED	LAST USED
Default	7 months ago	7 hours ago
Carrie Goff	23 days ago	a month ago
Test Profile	a year ago	a year ago

Share all profiles with Select Permission

LENDER SETUPS

Your Lender Setup are basic questions asked on most loans and are usually static to minimize your data entry.

For example, if you're tracking fees, preparing UCD, a small creditor, partial payment options, Signatures on the LE/CD, and more. Having multiple Lender setups are helpful for loans that won't prepare UCD, or even has fulfillment services when other loans may not.

SETUP NAME	MODIFIED	LAST USED
Test	a year ago	4 months ago
Small Credit	a day ago	a year ago

Share all setups with Select Permission

NOTE: It's common there is only one Lender Setup. However, if you have varying loan types that have different answers its good to have multiple!

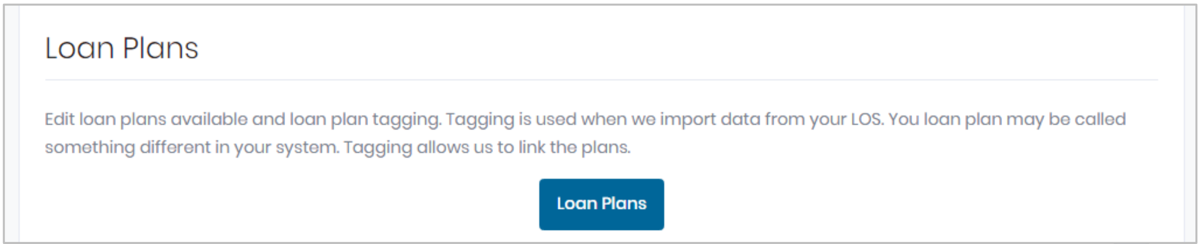
SHARING PROFILES AND SETUPS:

You may also share specific Profiles and Setups (like Templates) to others instead of sending all at once. This can be done by selecting the specific Profile or Setup and sharing (again exactly like Templates). You can see what Profiles or Setups are shared by the shared icon below:

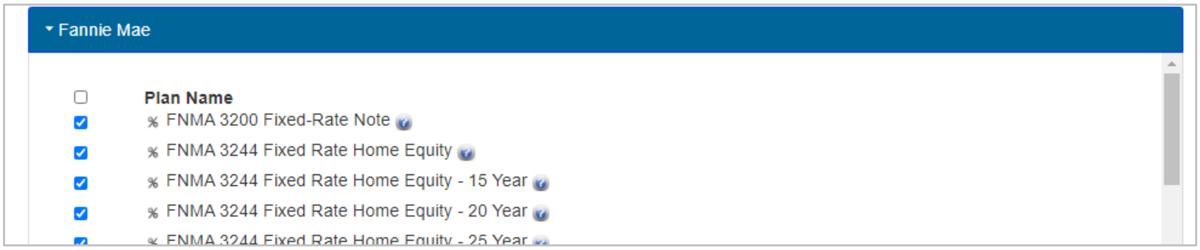
Carrie Goff	23 days ago	a month ago
Test Profile	a year ago	a year ago

LOAN PLANS

Loan plans are a guideline to a type of loan and provides you with specific Notes, Terms, and/or investors.



Check/uncheck boxes that you would or would not like to see in your orders and continue forward to be more specific within each program.



NOTE: The Loan Plans can also be adjusted by the user themselves, but this section allows you to see what Loan Plan each user sees when they order.

Don't hesitate to get with our team on any questions or concerns!

Here is a table to help you navigate your question appropriately:

Type of inquiries	Email Address
Document preparation questions and status updates on document orders	DocPrep@ppdocs.com
Questions for fulfillment orders	Fulfillment@ppdocs.com
Questions about rescission requirements, federal or state predatory lending test questions, guidance for particular scenarios, or other compliance related questions	Compliance@ppdocs.com
Technical support, bug reporting	Support@ppdocs.com
Legal specific questions	Legal@ppdocs.com
Registering, signing up, pricing quotes	CR@ppdocs.com
Billing, invoicing, credit card payments	Accounting@ppdocs.com