



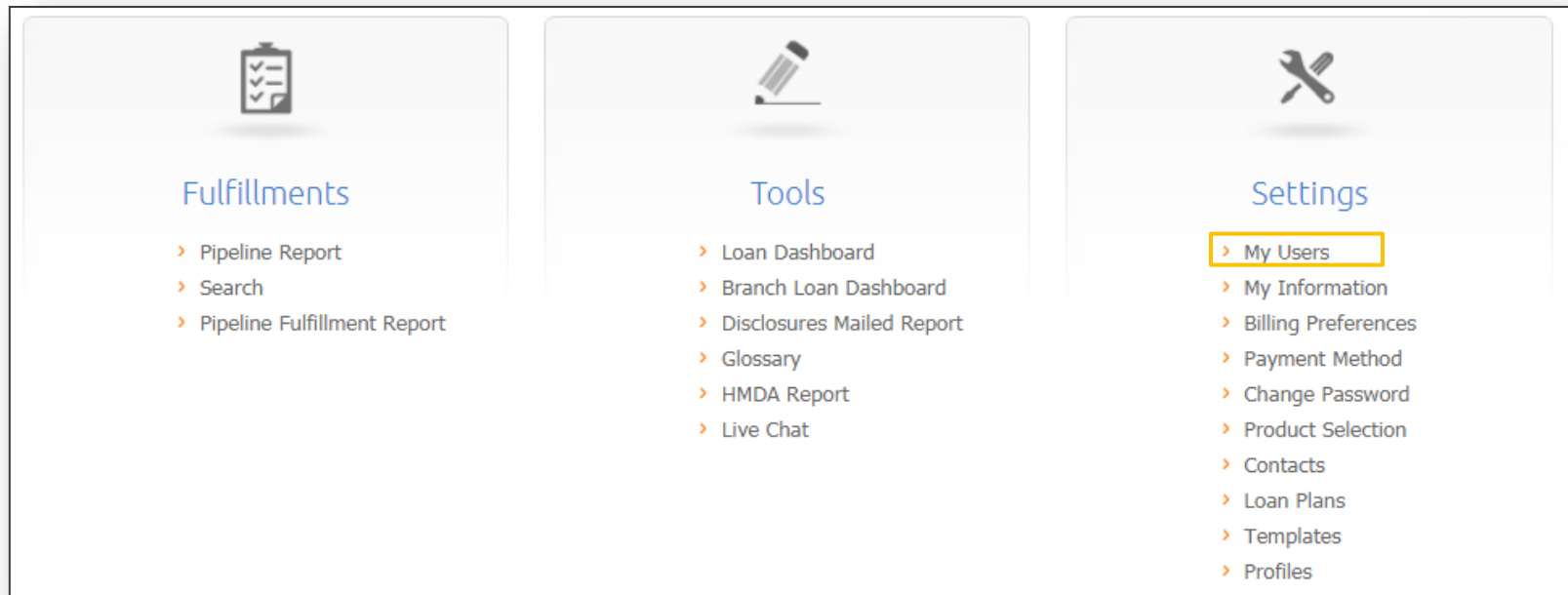
# New Admin Guide

A Guide to help you with your New Administration abilities within the PPDocs System.

# Branch Administration Privileges

Once you have been given Branch Admin privileges you may begin administrating your user via “My Users” page.  
(Account > Settings > My Users)

- If you do NOT have “My Users” in your Settings under your Account, please contact [support@ppdocs.com](mailto:support@ppdocs.com) and we will be glad to update this for you.



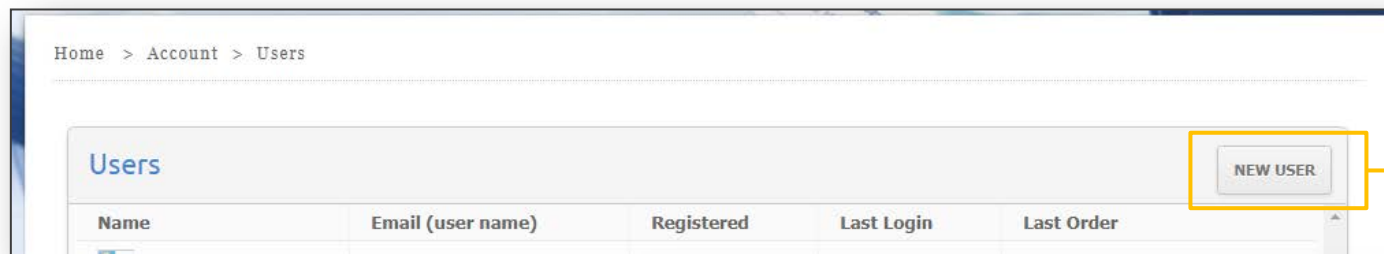
The screenshot displays three main sections of the Branch Administration interface:

- Fulfillments** (represented by a clipboard icon):
  - > Pipeline Report
  - > Search
  - > Pipeline Fulfillment Report
- Tools** (represented by a pencil icon):
  - > Loan Dashboard
  - > Branch Loan Dashboard
  - > Disclosures Mailed Report
  - > Glossary
  - > HMDA Report
  - > Live Chat
- Settings** (represented by a wrench and screwdriver icon):
  - > **My Users** (highlighted with a yellow box)
  - > My Information
  - > Billing Preferences
  - > Payment Method
  - > Change Password
  - > Product Selection
  - > Contacts
  - > Loan Plans
  - > Templates
  - > Profiles

# Adding a New User

One of our commonly used and beneficial tools for Admins is the ability to add a new user to your branch. To add a new user:

1. Click into your “**My Users**” Tab.
2. The top right hand corner will have “**New User**”
3. You’ll be taken to another screen to fill out all of the User Information.



4. Select “Add New” after completing all fields.
5. The New User will need to validate/activate their account from an invitation email sent by [noreply@ppdocs.com](mailto:noreply@ppdocs.com)

NEW USER INFORMATION

First Name:

Last Name:

Company:

Address:

Suite:

City, State Zip:  ,

Phone, Ext:

Fax:

Email:

Industry Sector:

Add New >



# Users

- In your “My Users” page, you are able to see a list of all the users in your branch and their Status (Active/Disabled).

Home > Account > Users

## Users

NEW USER

Name	Email (user name)	Registered	Last Login	Last Order
 Alex Perez	alex@ppdocs.com	7/10/2013	Today	3/16/2018 3:05:13 PM
 Ambra Costner	ambra@ppdocs.com	2/13/2012	Today	2/2/2018 9:58:34 AM

Clicking on one of your user's names will display the following variable info:

- ✓ User Information
- ✓ Contacts
- ✓ Product Displays
- ✓ Permissions
- ✓ Casefile Sharing
- ✓ Templates
- ✓ Profiles
- ✓ Loan Plans

# User Information

- User Information lists the information your user registered with. You can update their information for them if necessary.

Home > Account > Users > User Information

## USER INFORMATION

Account Number:	P3076520AL		
First Name:	<input type="text" value="Alex"/>		
Last Name:	<input type="text" value="Perez"/>		
Email:	alex@ppdocs.com		
Company:	<input type="text" value="PPDocs"/>		
Address:	<input type="text" value="2310 W Interstate 20"/>	Suite	<input type="text" value="100"/>
City, State Zip:	<input type="text" value="Arlington"/>	<input type="text" value="TX"/>	<input type="text" value="76017"/>
Phone, Ext:	<input type="text" value="(817) 784-2038"/>	<input type="text"/>	
Fax:	<input type="text"/>		
Date Registered:	<input type="text" value="7/10/2013 8:09:22 AM"/>		
Last Session:	<input type="text" value="3/19/2018 3:28:36 PM"/>		
Industry Sector:	<input type="text" value="Other"/>		
Email Subscriptions	<input checked="" type="checkbox"/> Monthly Newsletter <input type="checkbox"/> Release Notes		
Archive loans after:	<input type="text" value="6 Weeks"/>		

[Update >](#) [Contacts >](#) [Product Displays >](#)

Click **Update** to save any changes made.

# Contacts: Address Book

Selecting the Contacts will take you to the User's Address Book where you can add a new contact for the User, search a contact, or copy their Contacts to another User in your branch:

Email Subscriptions	<input checked="" type="checkbox"/> Monthly Newsletter <input type="checkbox"/> Release Notes
Archive loans after:	6 Weeks ▾
	<a href="#">Update &gt;</a> <a href="#">Contacts &gt;</a> <a href="#">Product Displays &gt;</a>

Home > Account > Users > Alex Perez > Address Book

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## ADDRESS BOOK

Category - <b>Appraiser</b> ▾	Search: <input type="text"/>	<a href="#">ADD NEW CONTACT</a>	<a href="#">COPY CONTACTS</a>
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**\*NOTE\***

“Copy Contacts” button will copy ALL contacts of the **user** you’ve selected in the “My Users” screen.

# Product Display

- Lists the available order forms for your branch. Here you can select which order forms are listed for that specific user. You can also move them up and down to change their order.

Email Subscriptions	<input checked="" type="checkbox"/> Monthly Newsletter <input type="checkbox"/> Release Notes
Archive loans after:	6 Weeks ▾
<a href="#">Update &gt;</a> <a href="#">Contacts &gt;</a> <a href="#">Product Displays &gt;</a>	

Home > Account > Users > Alex Perez > Product Display Setup

## PRODUCT DISPLAY SETUP

### Available Order Forms

- CGB Part-Time Farm
- Farmer Mac I Farm and Ranch Loan Program

### Selected Order Forms

- Initial Disclosures - RESPA ONLY NOT TRID
- Initial Disclosures w/ Loan Estimate for TRID
- Home Equity Line of Credit Disclosures
- Aggregate Escrow Analysis
- Legal Documents with Closing Disclosure
- Home Improvement (Primary Residence Only) - F
- Legal Documents Only
- Residential Mortgage
- Residential Non-Consumer Bank Loan (General I
- One-Time Closing
- Two-Time Closing (with Modification)
- Residential Consumer Bank Loan

<< >>

Up Dn

[Save Changes >](#)

Click **Save Changes** to complete.

# Permissions

- Lists the actions the User has access to when logged in.
  - **Admin** – Enables/Disables *another* user in your branch as an Administrator.  
*Note: If this is missing and you are the admin, you must enable at least one other admin in the branch.*
  - **Templates** – Sets permission on whether they can add or edit templates
  - **Profiles** – Sets permission on whether they can add or edit profiles

## PERMISSIONS

Admin:	<input checked="" type="checkbox"/> Yes
Templates:	<input checked="" type="checkbox"/> Add <input checked="" type="checkbox"/> Edit
Profiles:	<input checked="" type="checkbox"/> Add <input checked="" type="checkbox"/> Edit

[Update >](#)

Click **Update** to complete.

To Disable an account, you will UNCHECK all of these permissions.



# Case File Sharing

Case File Sharing allows you to grant access to other user's case file manager to a specific user, all users, or none.

- This can be different for each user and allows them to edit/update orders of another user.

## CASE FILE SHARING

Has access to:

Available Users:

- Becky Hamielec [becky@ppdocs.com]
- Carrie Goff [carrie@ppdocs.com]
- Jaime Dusten [jaime@ppdocs.com]
- Kelly Walton [kelly@ppdocs.com]
- Loan Wizard Live [merlin@ppdocs.com]
- sam test [teamadkins2@gmail.com]
- Samantha Adkins [samantha@ppdocs.com]

Specific Users ▾

- None
- All
- Specific Users

REMOVE

Has access to:

# Templates

This section will allow you to click on each template and bring up the familiar template information screen.

You can edit, create, send, copy, and delete as normal for each of your users.

Templates			
Template Name	Order Form	Modified	Last Used
<a href="#">Initial Disclosure - Conv Purchase</a>	Initial Disclosures w/ Loan Estimate for TRID	10 Days	12 Days
<a href="#">Modification of Perm</a>	Modification or Assumption of Permanent	> Month	> Month
<a href="#">Initial FHA Purchase</a>	Initial Disclosures w/ Loan Estimate for TRID	Today	> Month
<a href="#">Initial Disclosures Lot Loan</a>	Initial Disclosures w/ Loan Estimate for TRID	> Month	> Month
<a href="#">National United - TEMP 0/3 ARM</a>	Residential Consumer Bank Loan	> Month	> Month
<a href="#">National United - TEMP 0/3 ARM</a>	Residential Mortgage	> Month	> Month
<a href="#">Conv. Purch. ARM-copy</a>	Loan Estimate ONLY for TRID	> Month	> Month
<a href="#">Conv. Purch. ARM</a>	Loan Estimate ONLY for TRID	> Month	> Month
<a href="#">Conv. Purch. ARM-copy</a>	Loan Estimate ONLY for TRID	> Month	> Month
<a href="#">Conv. Purch. ARM</a>	Loan Estimate ONLY for TRID	> Month	> Month

Please see our [Templates Guide](#) in our [PPDocs Guides](#) for further assistance on Templates

# Profiles

Similar to your Templates you can click on each profile and it will bring up the familiar profile information screen.

You can edit, create, send, copy and delete as normal for each of yours users.

The image shows a software interface for managing profiles. It consists of two main parts: a list view and a detailed view.

**Profiles List View:**

Profile Name	Modified	Last Used
Default	> Month	6 Days

A yellow box highlights the 'Default' profile name in the table, with a line connecting it to the detailed view below.

**Profile: Default Detailed View:**

Beneficiary:	PPDocs
Organization:	PPDocs
Funder:	PPDocs
Trustee:	Michael Patterson
1st Payment:	PPDocs
Return To:	PPDocs
Servicer:	PPDocs
Payment address on Notes:	2310 W Interstate 20, 100
Loan Originator Company:	

**Options:**

Edit Profile:	<a href="#">Edit Profile &gt;</a>
Clone Profile:	<a href="#">Clone Profile &gt;</a>
Send this profile to:	<input type="text"/> <a href="#">Send to &gt;</a>
Rename this profile to:	<input type="text" value="Default"/> <a href="#">Rename &gt;</a>
Delete Profile	

# Loan Plans

- Check/Uncheck any loans plans you do/do not use.
- Click “Continue” to select specific loan plans you may use for each category.
- This will filter what loan plans you see when ordering documents.

The screenshot displays a web interface for selecting loan plans. It is divided into two main sections. The left section, titled "Loan Plans", contains a list of lenders with checkboxes for selection. The right section, also titled "Loan Plans", shows a detailed view of the "Fannie Mae" category, listing various loan plans with checkboxes and icons for expansion.

**Loan Plans**

Please select loan programs used by your lender

- Agri-Access
- AgStar
- AMTrust
- Aurora
- Bank of America
- Chase Correspondent Lending
- Citi Mortgage
- EMC Mortgage
- Fannie Mae
- Farmer Mac
- FHA
- First Horizon
- Flagstar
- Franklin American
- Freddie Mac
- GMAC RFC
- Green Tree
- Morgan Stanley
- National City
- PeirsonPatterson, LLP
- PHH Mortgage Corp
- Platinum Direct Funding
- Portfolio
- SunTrust
- US Bank
- VA
- Wells Fargo

**Continue...**

**Loan Plans**

Please select loan plans used by your lender

▼ **Fannie Mae**

<input type="checkbox"/>	Plan Name
<input checked="" type="checkbox"/>	FNMA 3200 Fixed-Rate Note
<input checked="" type="checkbox"/>	FNMA 3244 Fixed Rate Home Equity
<input checked="" type="checkbox"/>	FNMA 3244 Fixed Rate Home Equity - 15 Year
<input checked="" type="checkbox"/>	FNMA 3244 Fixed Rate Home Equity - 20 Year
<input checked="" type="checkbox"/>	FNMA 3244 Fixed Rate Home Equity - 25 Year
<input checked="" type="checkbox"/>	FNMA 3255 Growing-Equity Note
<input checked="" type="checkbox"/>	FNMA 3260 Balloon + Adden 3266 & Rider 3180 Cond. Right to Refi.
<input checked="" type="checkbox"/>	FNMA 3271 5- 10- or 15 year Fixed Rate Interest First
<input checked="" type="checkbox"/>	FNMA Biweekly Fixed Rate
<input checked="" type="checkbox"/>	FNMA Biweekly Fixed Rate without Conversion Option

Please contact [support@ppdocs.com](mailto:support@ppdocs.com) if additional assistance is needed.



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