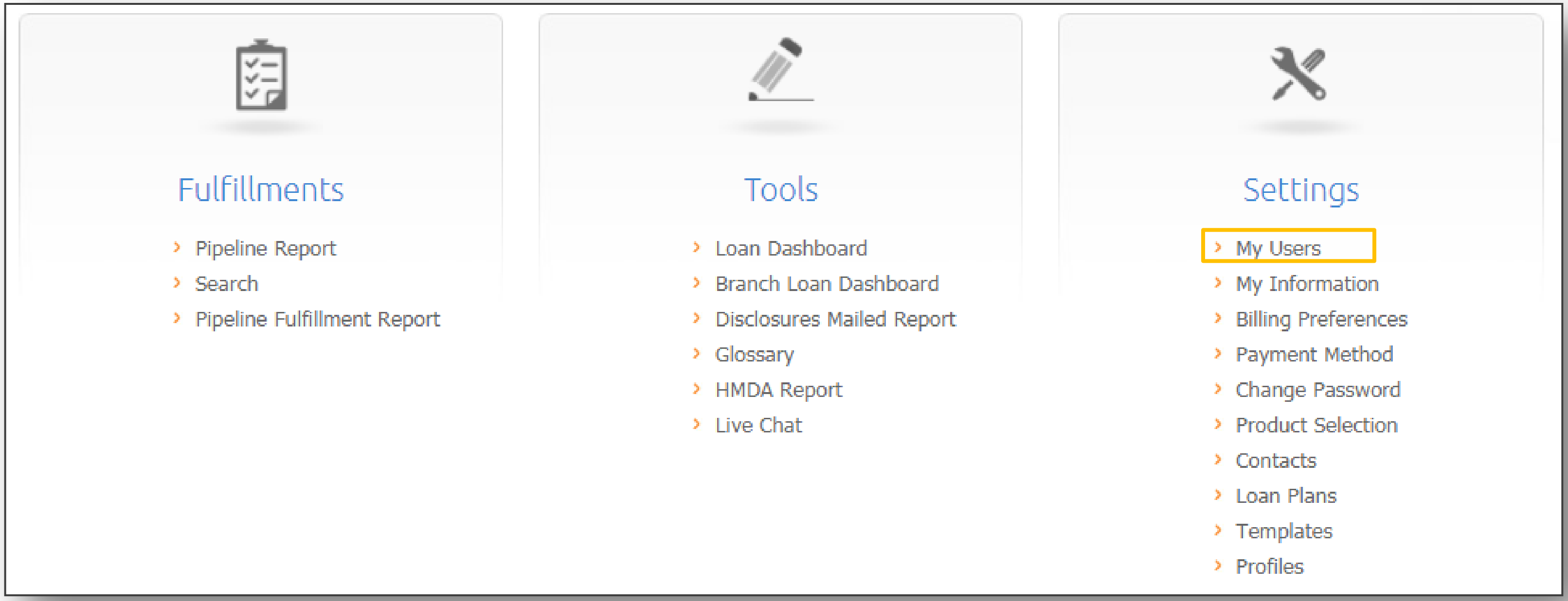
New Admin Guide

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)

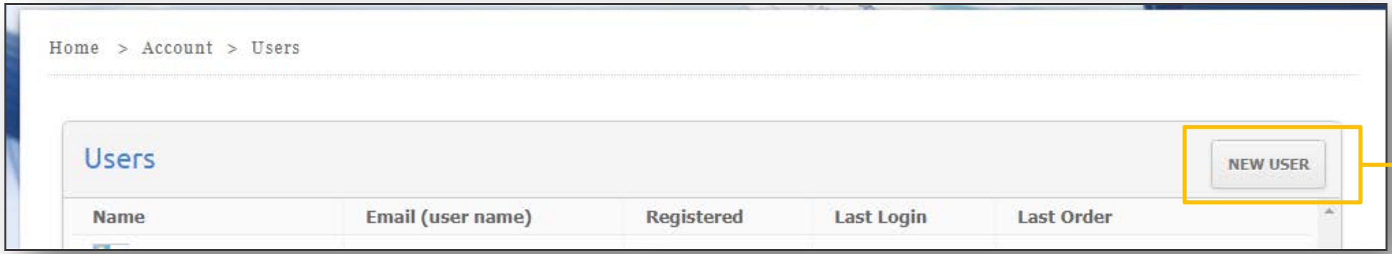
- If you do NOT have “My Users” in your Settings under your Account, please contact support@ppdocs.com and we will be glad to update this for you.

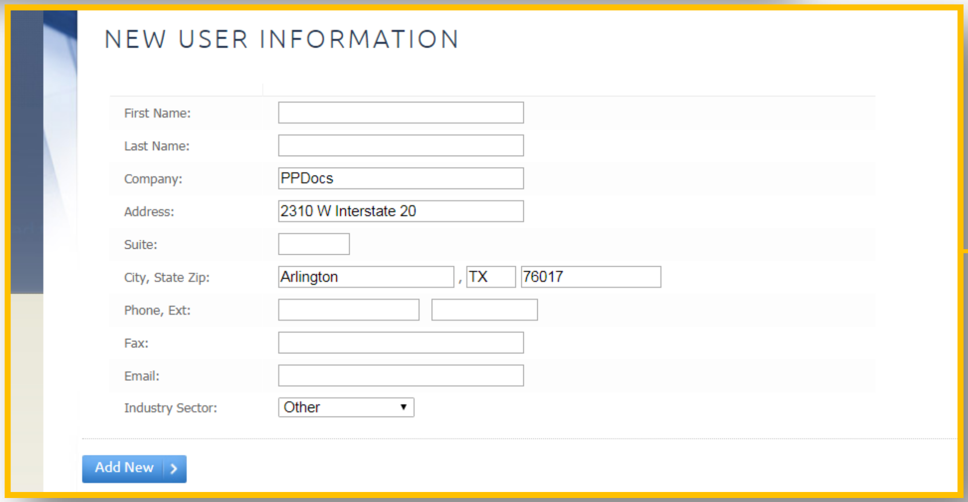


Adding a New User

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

Users

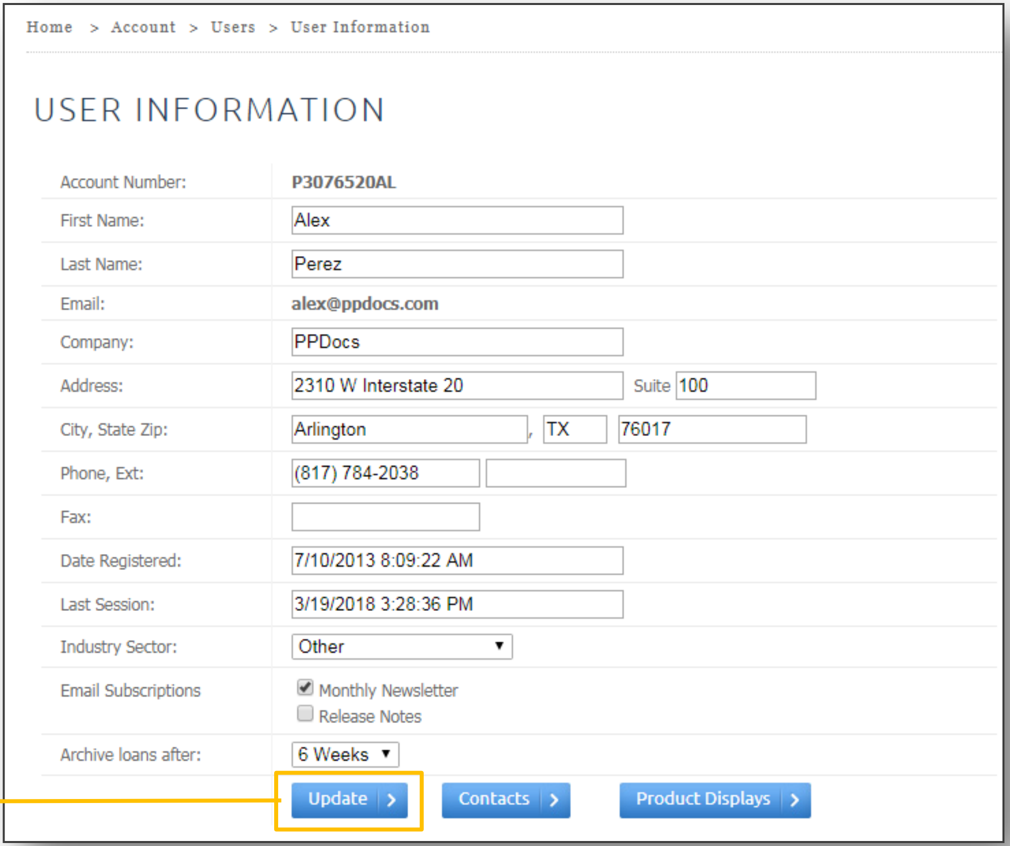
- In your “My Users” page, you are able to see a list of all the users in your branch and their Status (Active/Disabled).

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

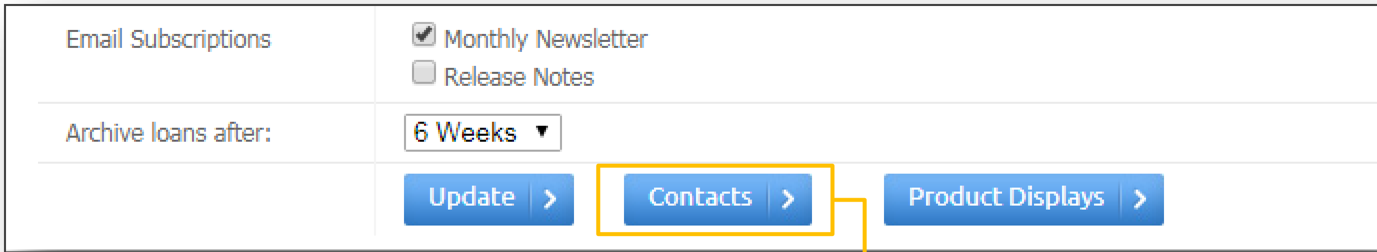
- User Information lists the information your user registered with. You can update their information for them if necessary.

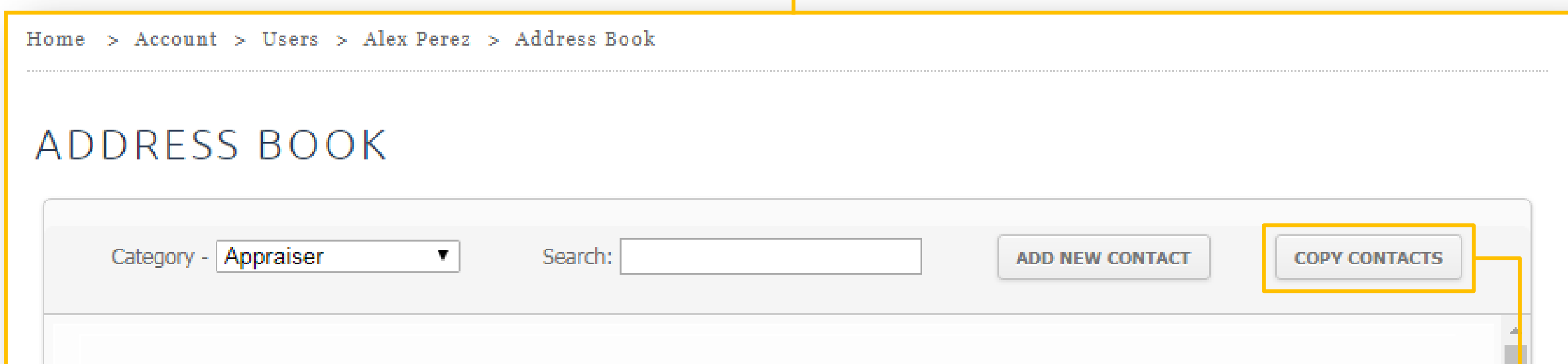


Click **Update** to save any changes made.

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:

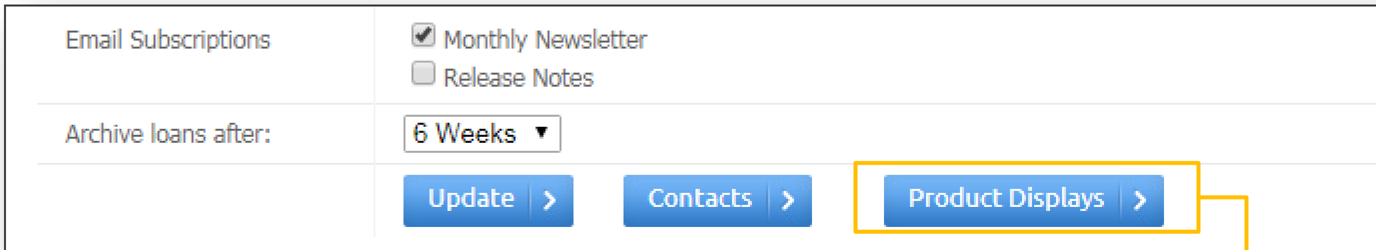


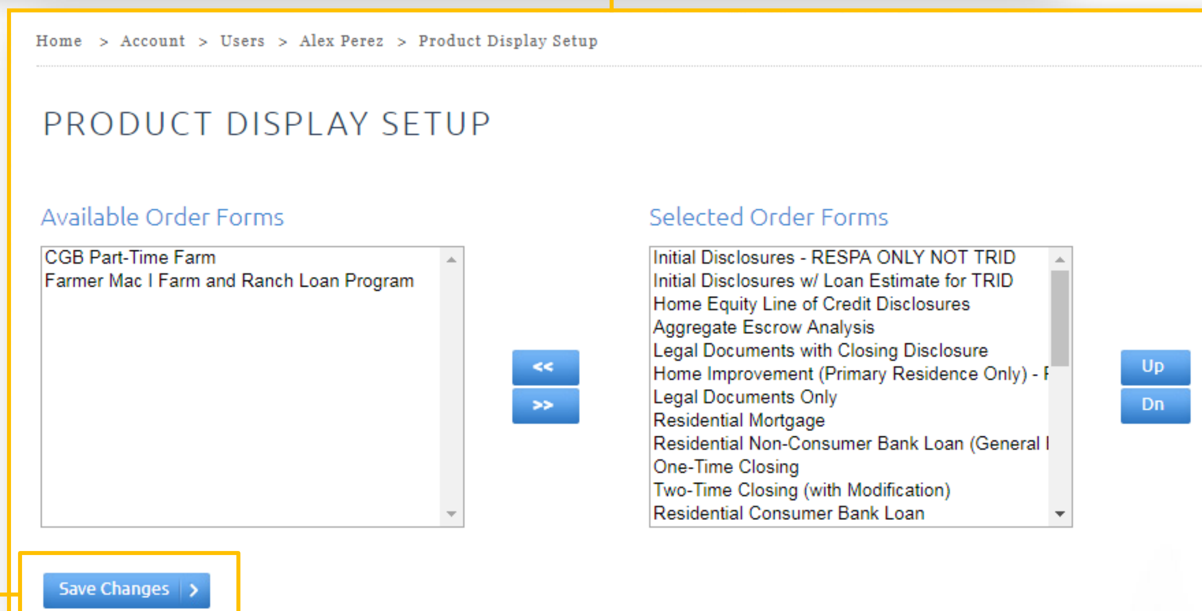


NOTE
"Copy Contacts" button will copy ALL contacts of the **user** you've selected in the "My Users" screen.

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.

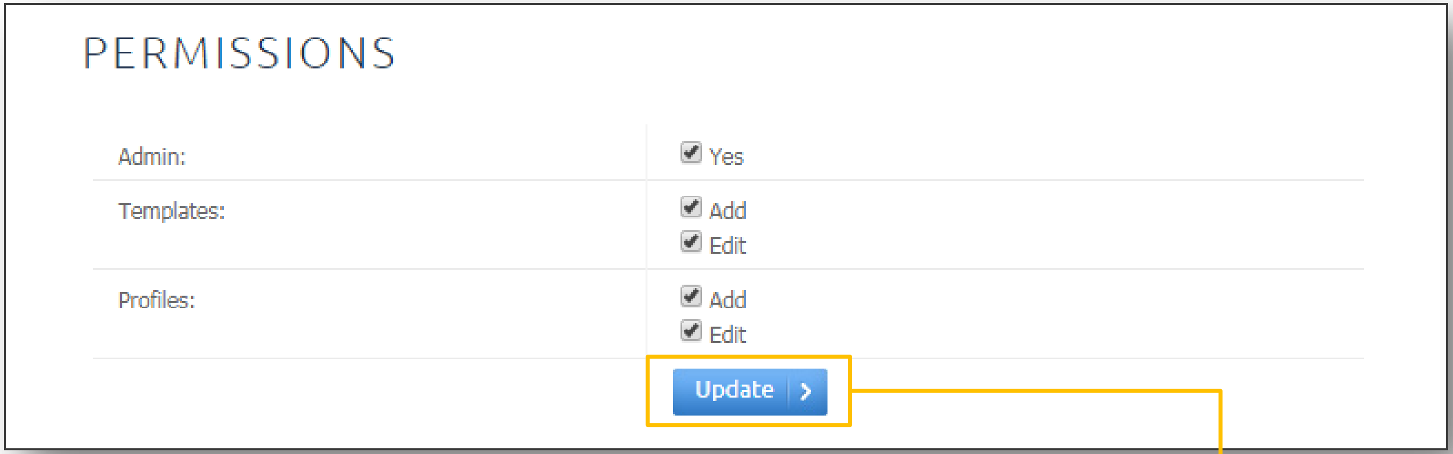




Click **Save Changes** to complete.

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



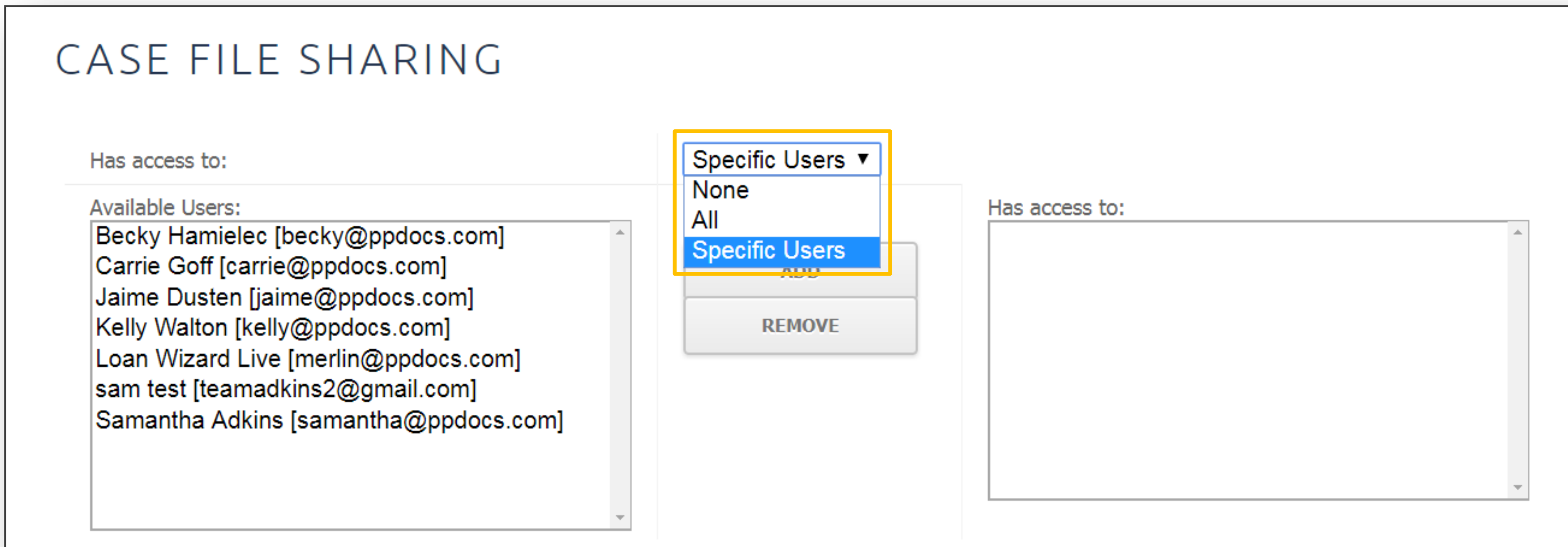
Click **Update** to complete.

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.



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

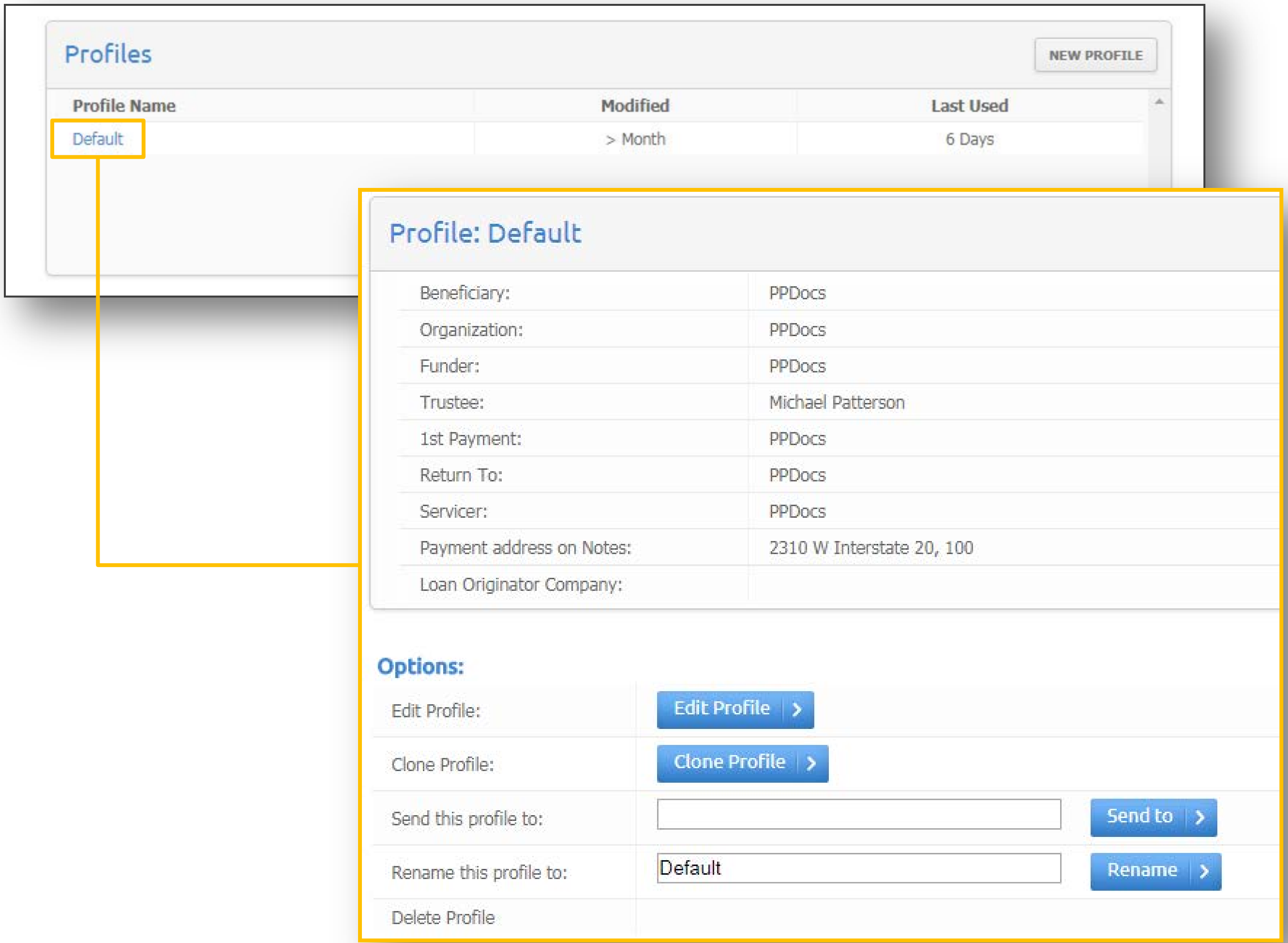
Template Name	Order Form	Modified	Last Used
Initial Disclosure - Conv Purchase	Initial Disclosures w/ Loan Estimate for TRID	10 Days	12 Days
Modification of Perm	Modification or Assumption of Permanent	> Month	> Month
Initial FHA Purchase	Initial Disclosures w/ Loan Estimate for TRID	Today	> Month
Initial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

Please see our Templates Guide in our PPDocs Guides for further assistance on Templates

Profiles

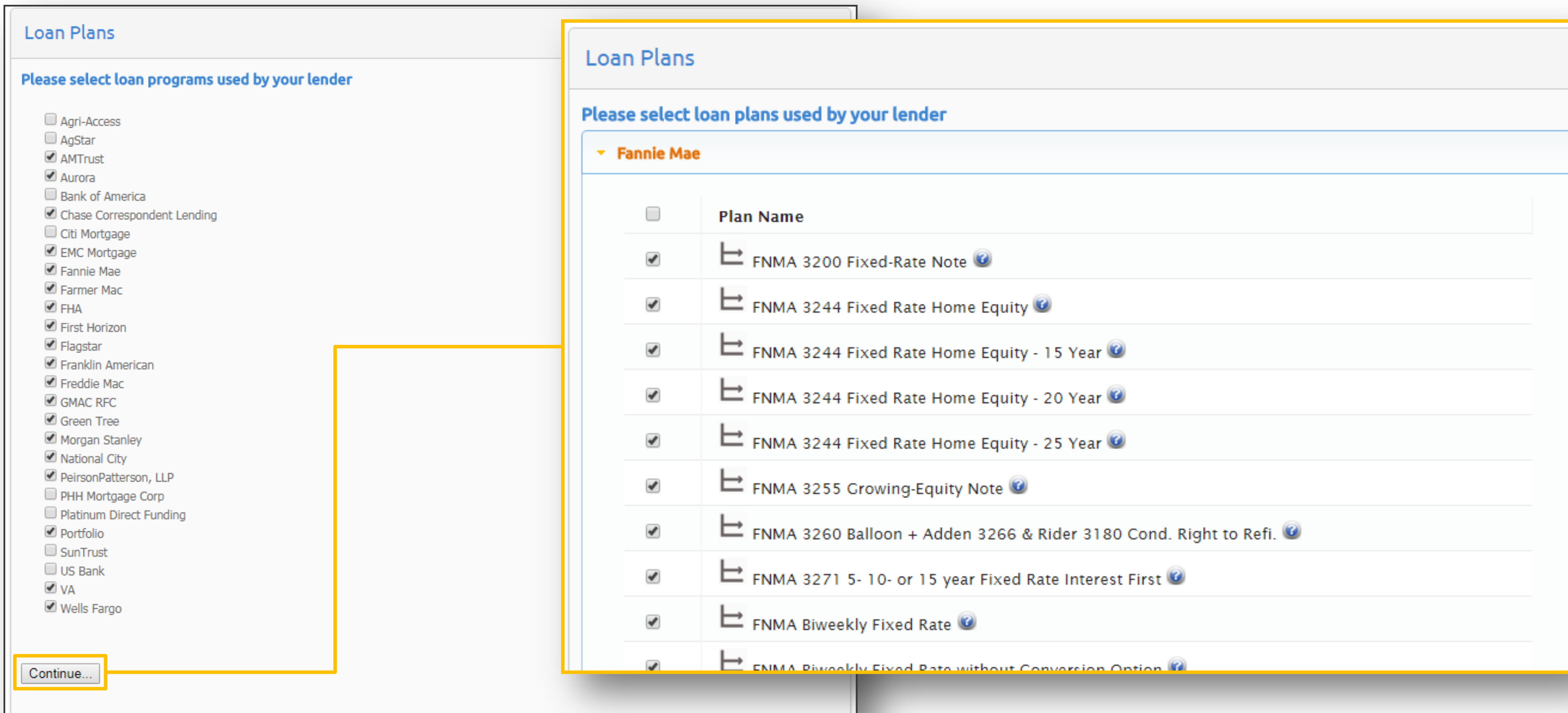
Similar to your Templates you can click on each profile and it will bring up the familiar profile information screen.

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



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.



Please contact support@ppdocs.com if additional assistance is needed.

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