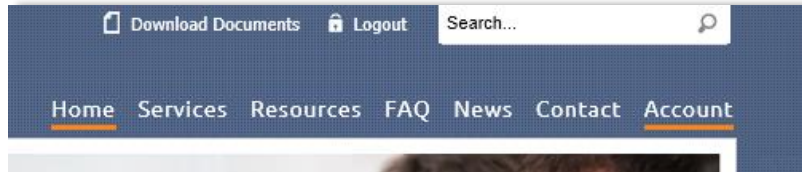


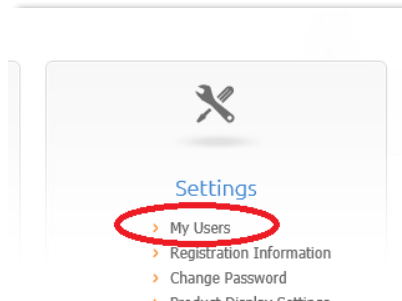
PPDocs, Inc. - New Admin Guide

Once you have been given Branch admin privileges you may begin administrating your users via our new admin page. If you have not been granted admin privileges please contact us at support@ppdocs.com and we will be glad to add that for you.

1. Login to the admin account and click on **Account**




2. Click on **My Users**



3. Here you will be able to see a list of the users in your branch and their status:



Users					NEW USER
 Sheri Henry	sheri@ppdocs.com	8/1/2000	> Month	5/28/2009 4:46:48 PM	
 Carrie Goff	carrie@ppdocs.com	2/15/2013	> Month	N/A	

4. Clicking on one of your user's name will display their **User Information, Contacts, Product Displays, Permissions, Case File Sharing, Templates, Profiles, and Loan Programs.**

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

USER INFORMATION	
Account Number:	P0081314HS
First Name:	Sheri
Last Name:	Henry
Email:	sherih@ppdocs.
Company:	PeirsonPatterson
Address:	2310 Interstate
City, State Zip:	Arlington
Phone, Ext:	(817) 461-5500
Fax:	(817) 856-6060
Date Registered:	8/1/2000 9:02:5
Last Session:	3/4/2014 5:39:2
Industry Sector:	Attorney
Email Subscriptions	<input checked="" type="checkbox"/> Monthly News <input type="checkbox"/> Release Notes
Archive loans after:	6 Weeks
Update	

Click **Update** to save the changes

- **Contacts** lists the users contacts, here you can add a new contact for your user or copy their contacts to another user in your branch

Home > Account > Users > Sheri Henry > Address Book

ADDRESS BOOK

Category: **Appraiser** Search:

[ADD NEW CONTACT](#) [COPY CONTACTS](#)

- **Product Displays** lists the available order forms for your branch. Here you can select the order forms that is listed for that specific user and move them up and down to change their order.

Home > Account > Users > Sheri Henry > Product Display Setup

PRODUCT DISPLAY SETUP

Available Order Forms

- Legal Documents with TIL
- Home Improvement (Primary Residence Only) - Per
- Farmer Mac I Farm and Ranch Loan Program

Selected Order Forms

- Initial Disclosures
- Home Equity Line of Credit Disclosures
- Aggregate Escrow Analysis
- Legal Documents Only
- Residential Mortgage
- Residential Non-Consumer Bank Loan (Investme
- Residential Consumer Bank Loan
- Texas Home Equity (Closed End)
- Home Equity Line of Credit (Open End)
- Builder Interim
- Borrower Interim (for Interest Only Home Improve
- Lot/Land Only Loan

[<<](#)
[>>](#)
[Up](#)
[Dn](#)

[Save Changes](#)

Click **Save Changes**

- **Permissions** lists the items they are able to do when logged in.
 - **Active** – Enables/Disables their account. This can be used to restrict them from logging in or they leave your branch.
 - **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

Active:	<input checked="" type="checkbox"/> Yes
Admin:	<input 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
<input type="button" value="Update >"/>	

Click **Update** to save the changes

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

CASE FILE SHARING

Has access to:

Available Users:

- Alex Perez [alex@ppdocs.com]
- Becky Boyd [beckyb@ppdocs.com]
- Becky Hamielec [becky@ppdocs.com]
- Belinda Davis [belinda@ppdocs.com]
- Carrie Goff [carrie@ppdocs.com]
- Cheri Denney [cheri@ppdocs.com]
- Cheryl K [cheryl@ppdocs.com]
- Christina Cooper [christinac@ppdocs.com]
- Crystal Henry [crystalh@ppdocs.com]
- Dallas Rivera [dallas@ppdocs.com]

Specific Users

- None
- All
- Specific Users

ADD

REMOVE

Has access to:

- **Templates** allows you to click on each template and it will bring up the familiar template information screen. You can edit, create, send, copy, and delete as normal for each of your users.
- **Profiles** allows you to 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 your users.

- **Loan Program** allows you to hide or mark as favorite specific loan plans. Use the drop down box to select the type and hide or favorite specific loan plans.

<input type="checkbox"/> Visible		<input type="checkbox"/> Favorite		Plan ID	Plan Name	Note #	Rider #	Adden #
<input checked="" type="checkbox"/>		RuraLiving w/o Rider 15yr	RuraLiving Home Mortgage - 15 year (w/o Rider)	3200				