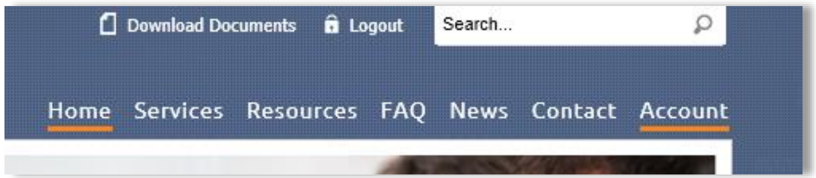
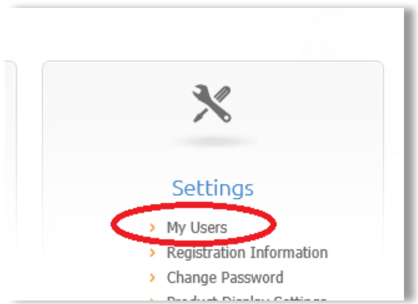
PPDocs, Inc. - New Admin Guide

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**



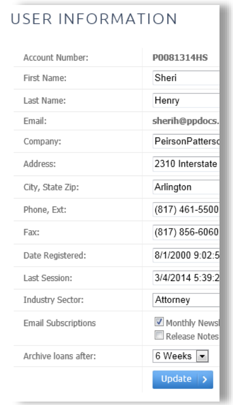
2. Click on **My Users**



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

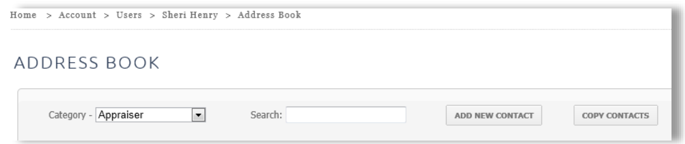
4. Clicking on one of your user's name will display their **User Information**, **Contacts**, **Product Displays**, **Permissions**, **Case File Sharing**, **Templates**, **Profiles**, and **Loan Programs**.

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

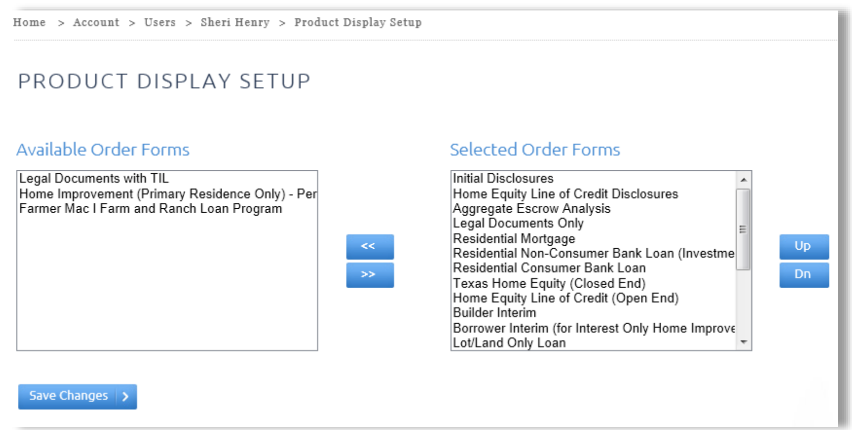


Click **Update** to save the changes

- **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

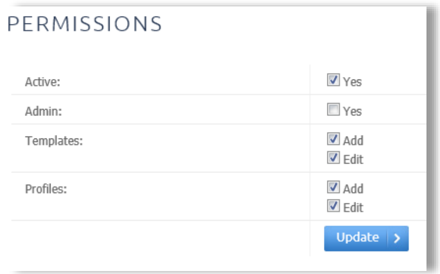


- **Product Displays** lists the available order forms for your branch. Here you can select the order forms that is listed for that specific user and move them up and down to change their order.



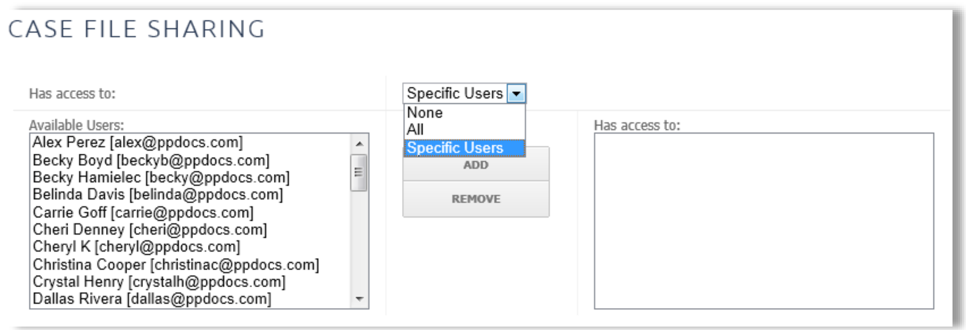
Click **Save Changes**

- **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



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



- **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.