Stacking Order
Before Adjusting Stacking Order

Before a user can adjust the stacking order, they must have the “Manage Plan Sorting” box checked in their User Profile.

To access their User Profile, the account administrator must login to www.docmagic.com.
Login with your email and password.

Click “LOG IN”
Stacking Order

Choosing Users

Select Users from the Dashboard
Click on the Last Name, First Name, or User Email to update an existing User Account

<table>
<thead>
<tr>
<th>LAST NAME</th>
<th>FIRST NAME</th>
<th>USER EMAIL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Garrett</td>
<td>David</td>
<td><a href="mailto:david@docmagic.com">david@docmagic.com</a></td>
</tr>
<tr>
<td>Truitt</td>
<td>Steve</td>
<td><a href="mailto:struitt@docmagic.com">struitt@docmagic.com</a></td>
</tr>
<tr>
<td>Dunlop</td>
<td>Richard</td>
<td><a href="mailto:rdunlop@docmagic.com">rdunlop@docmagic.com</a></td>
</tr>
</tbody>
</table>
In the “User Privileges” section, make sure the “Manage Plan Sorting” box is checked.

If not, check the box and click the “Finished” button at the bottom of the screen until you’re back on the Dashboard page.
Stacking Order is adjusted by moving the MISMO categories assigned to the forms. The MISMO categories can be easily viewed in the DocMaster viewer.

The next several sheets will go over how to install DocMaster. Start by going to www.docmagic.com.
To access DocMaster hover your mouse on “Solutions” which can be found on the top ribbon of the dashboard. This brings up a drop-down menu.

Click “Downloads”.

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Stacking Order
Downloading and Installing DocMaster
Stacking Order

Downloading and Installing DocMaster

Click “Download Now”.

Get WebDocs
FREE, EASY, FAST and SECURE, a simple password entered at Get WebDocs on our website allows anyone to safely review, retrieve and print complete loan document packages, whenever or wherever needed.

DocMaster v4.5 - Document Imaging Module
View and print emailed or downloaded WebDocs with this easy to use, self-contained utility. Transport a complete set of documents to any email address anywhere... FREE. Enjoy hassle free verification and no wasted paper.

Download Now
Follow the instructions on this page.

Click "Download".
Sometimes a security warning or banner may appear during the installation. If so, click "Run".

DocMaster is safe and will not harm your computer.
Stacking Order

Downloading and Installing DocMaster

Go to the location where the file is saved.

This is usually found in the Downloads folder.
Double-click the *docmaster4580.exe* file. DocMaster will then install automatically.
The installation wizard will appear the first time you launch DocMaster.

Click "Next".
The End User License Agreement (EULA) will appear.

Click "I Agree".
Stacking Order

Downloading and Installing DocMaster

DocMaster will now be installed on your computer.

Once the green bar fills up, you will be able to click “Next” to advance.
Stacking Order

Downloading and Installing DocMaster

DocMaster is now installed.

Click finished.
To view your document package in DocMaster, you will first need to process a set of documents in DocMagic Online.

If you are unsure about DocMagic Online, please consult the DMO workbook.
Enter all relevant information in DMO then click audit.
Stacking Order
Processing a Set of Documents

Click process.
Stacking Order
Processing a Set of Documents

Select “DBK (PCL)” under File Format.

Click Process.
Stacking Order

Viewing Documents in DocMaster

Now you’ll see your documents in the DocMaster viewer shown below.

Press and hold down the “ctrl” key on your keyboard and click the letter “M”.

DocMaster - BORROWER ONE SAMPLE

File Tracking Options Help

View Print Attach file eDelivery

Online... Not modified 0 of 22 pgs documents275417 Add'l Copies: 0

WS # 100BO_110506034770 Plan: 100BO_DSL_CONV
- Esign Disclosure And Consent
- Loan Detail Report
- California Domestic Partnership Addendum To Urla
- Uniform Residential Loan Application
- 4506t - Request For Transcript Of Tax Return
- Loan Estimate
- Notice Of Intent To Proceed With Loan Application
- Social Security Administration Authorization For The Ssa
You will move the forms stacking order by moving the MISMO categories at the DocMagic website.

Now you will see the documents with their MISMO category in parentheses to the right.
Go back to DocMagic’s website and choose Stacking Order from the dashboard.
Stacking Order

Left vs. Right

The left column contains all document categories available.

The right column contains your current stacking order in DocMaster – this is where you will adjust your stacking order.
When you move a MISMO category, you move all the forms that reside in that category.

Clicking on the category details button will allow you to see all the forms in that NISMO category.
Available actions will appear here. Actions not allowed for your current selection will be greyed out.

Click on a category to select it. The category will appear red when clicked.
Enter keywords to search for a specific document category. Results appear automatically.

Click here to add the selected category to your stacking order.
Stacking Order

Available Actions

Click here to remove the selected category from your stacking order.

Click here to move the selected category up or down in your stacking order.
Stacking Order

Available Actions

You can also hold down the left mouse to drag and drop the category into position.

Once the category is where you want it to be, click on it to deselect.
As always, if any changes have been made, scroll down to the bottom of the page and hit Finished to save changes.

Again - stacking order changes done on the website affect the entire account!
Stacking Order

Clicking finished brings you back to the dashboard.

Return to the DocMaster program to see any changes made the stacking order.