PENNYMAC CORRESPONDENT | P3

Client Readiness Training

Admin Functions

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Content

On this module, we will go over the following topics:

1 **User Administration**

Understand how to configure a new user and disable a user in P3

2 **Configure Users' Notifications**

Learn to turn on the notifications that users receive by email

MODULE DURATION
6 MINUTES

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Scenario: Admin Functions

As an Admin User, Laura needs to add a co-worker as a user in P3. She also needs to make sure they will receive the proper email notifications.

Let’s see how to perform these task in P3.

User Administration

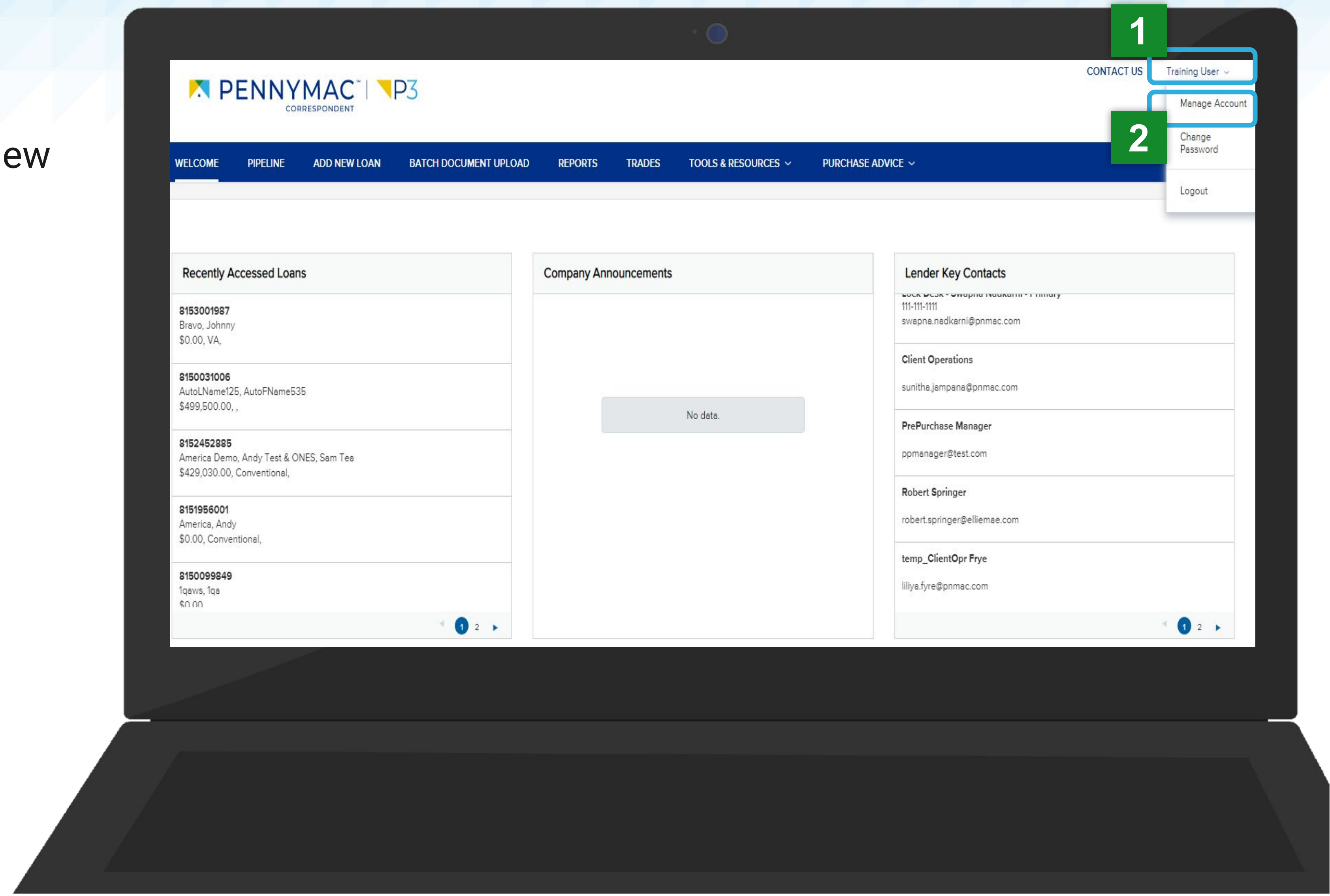
User Administration

Follow the next steps to create a new user:

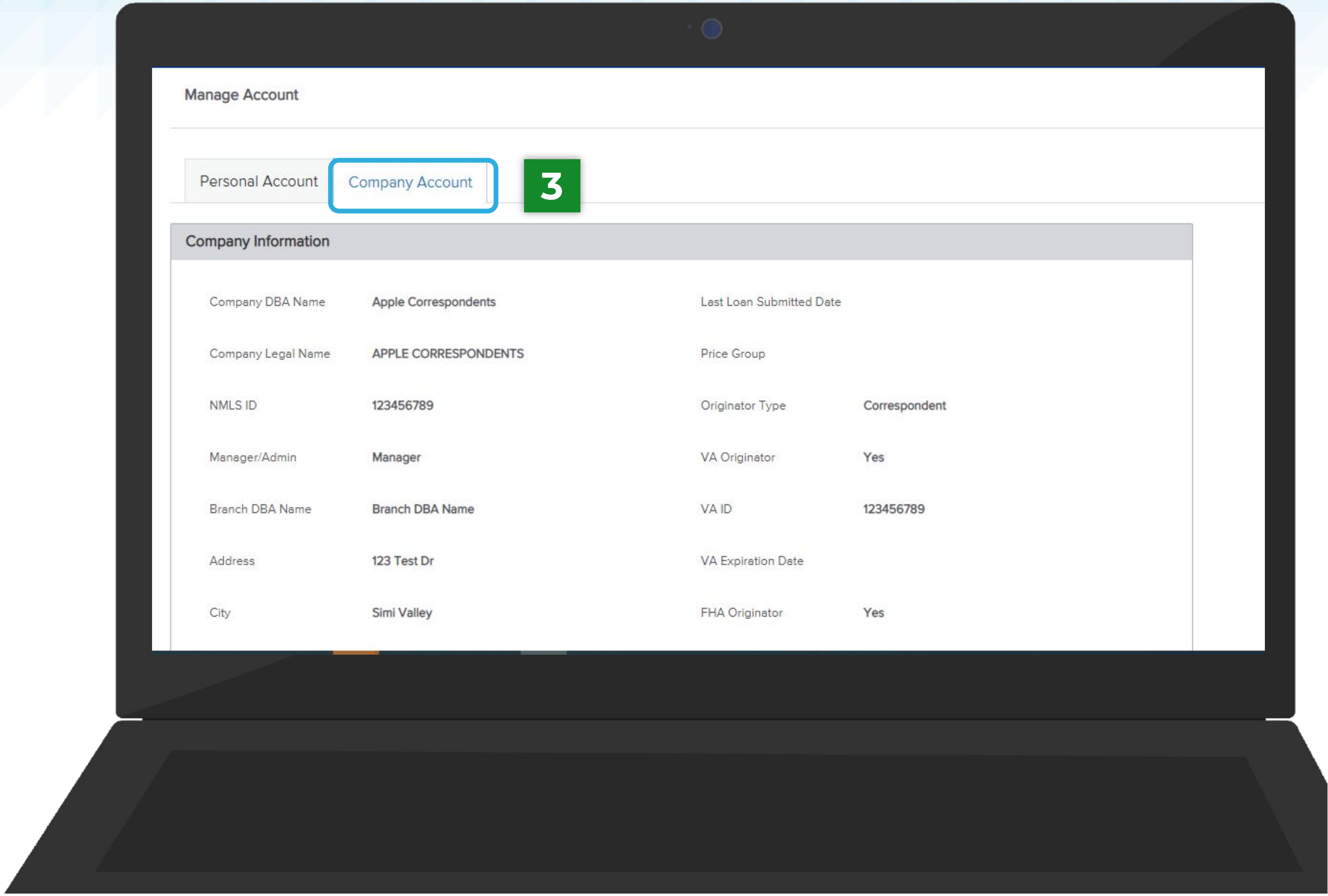
1 After logging into P3, click on ***Your User Name*** field on the upper right corner.

2 Once drop-down menu displays, click on ***Manage Account*** button.

Remember! Only the Admin Persona user can create new users in P3.

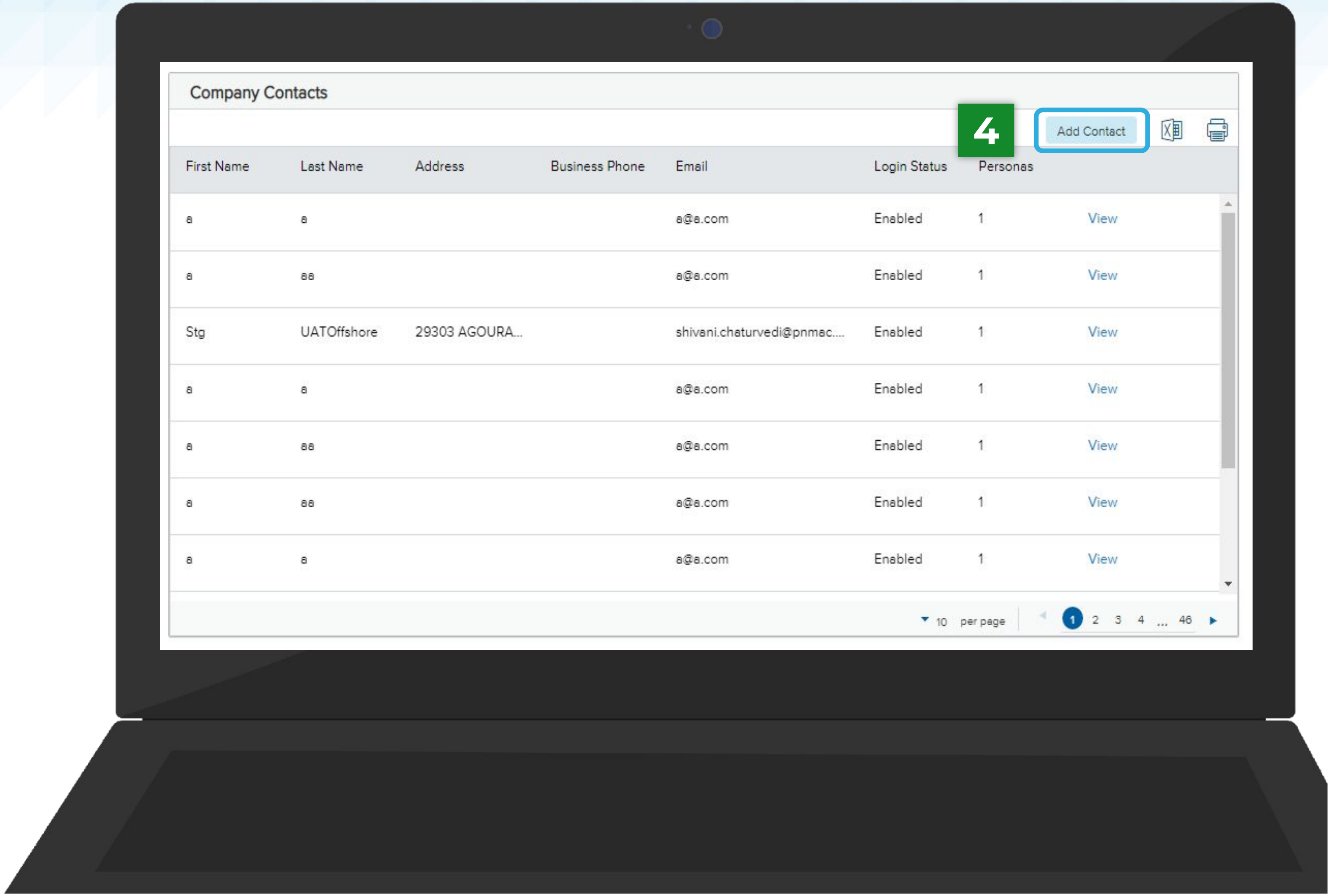


User Administration



3 Once ***Manage Account*** window displays, click the ***Company Account*** tab.

User Administration



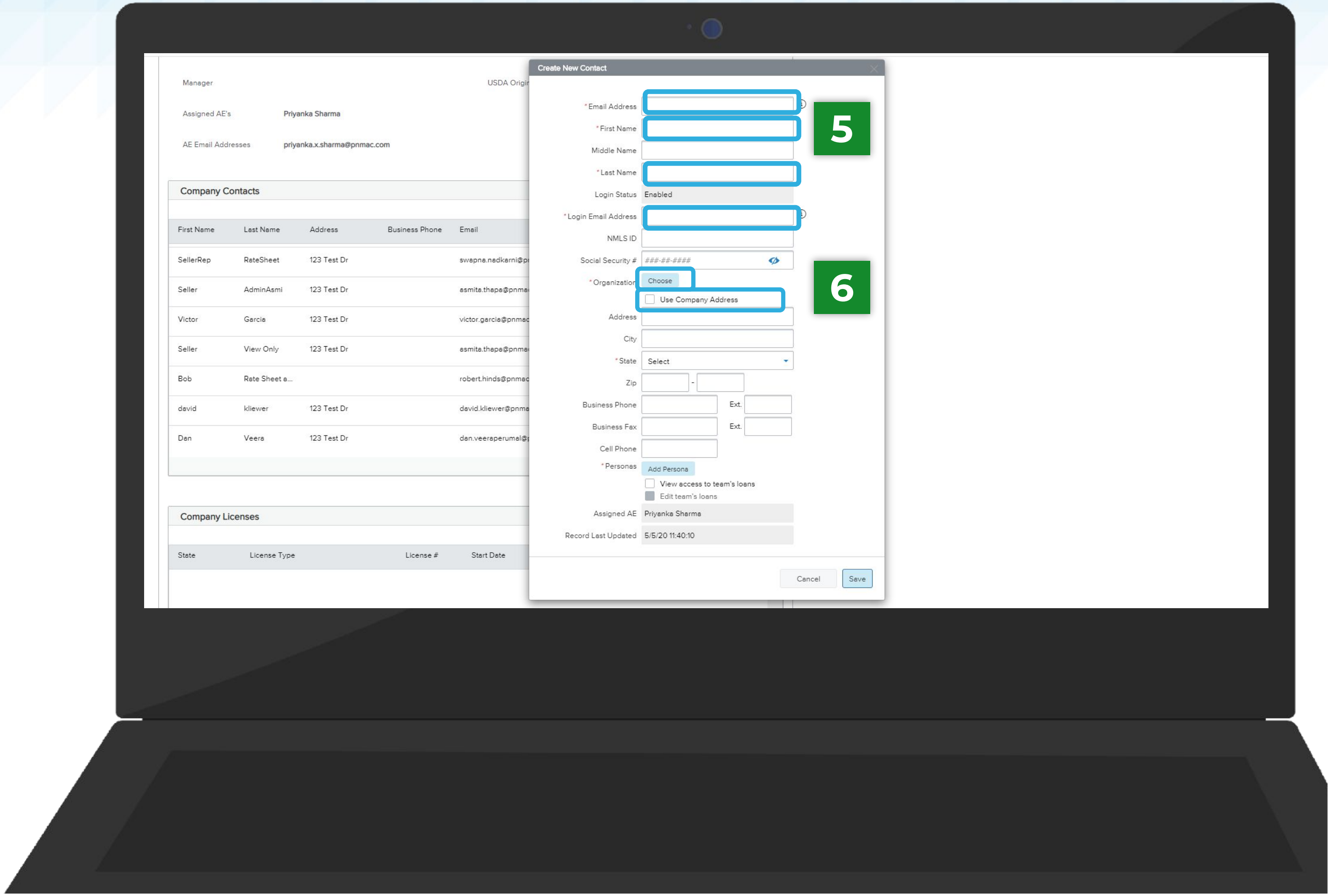
4 Scroll down and click the ***Add Contact*** button in the ***Company Contacts*** section.

User Administration

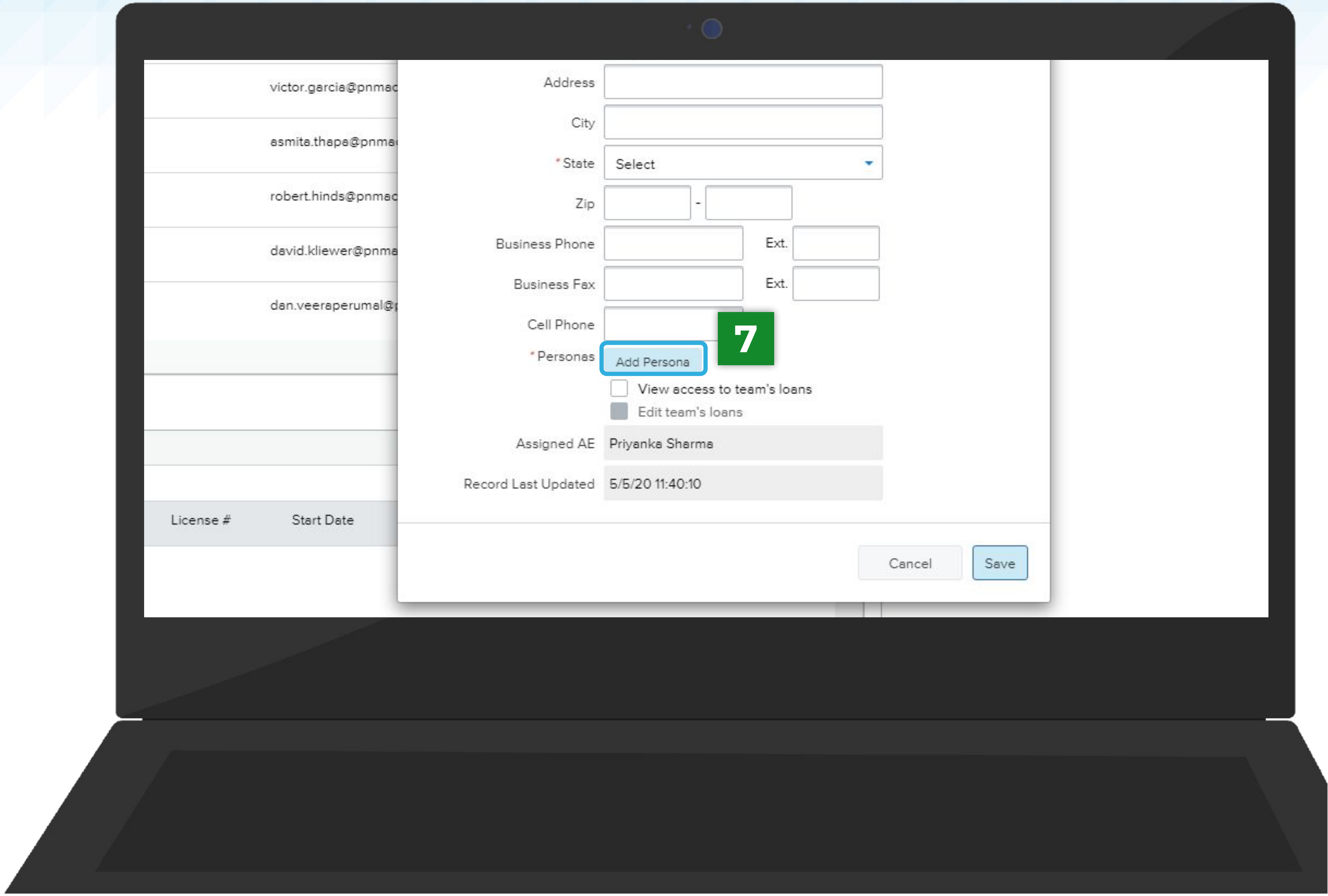
5 ***Create New Contact*** window displays. Enter the required information in the following fields:

- Email Address
- First and Last name
- Login Email Address
- Organization

6 Select ***Use Company Address*** check box to prefill it with the selected organization’s address or type a different one in manually.



User Administration

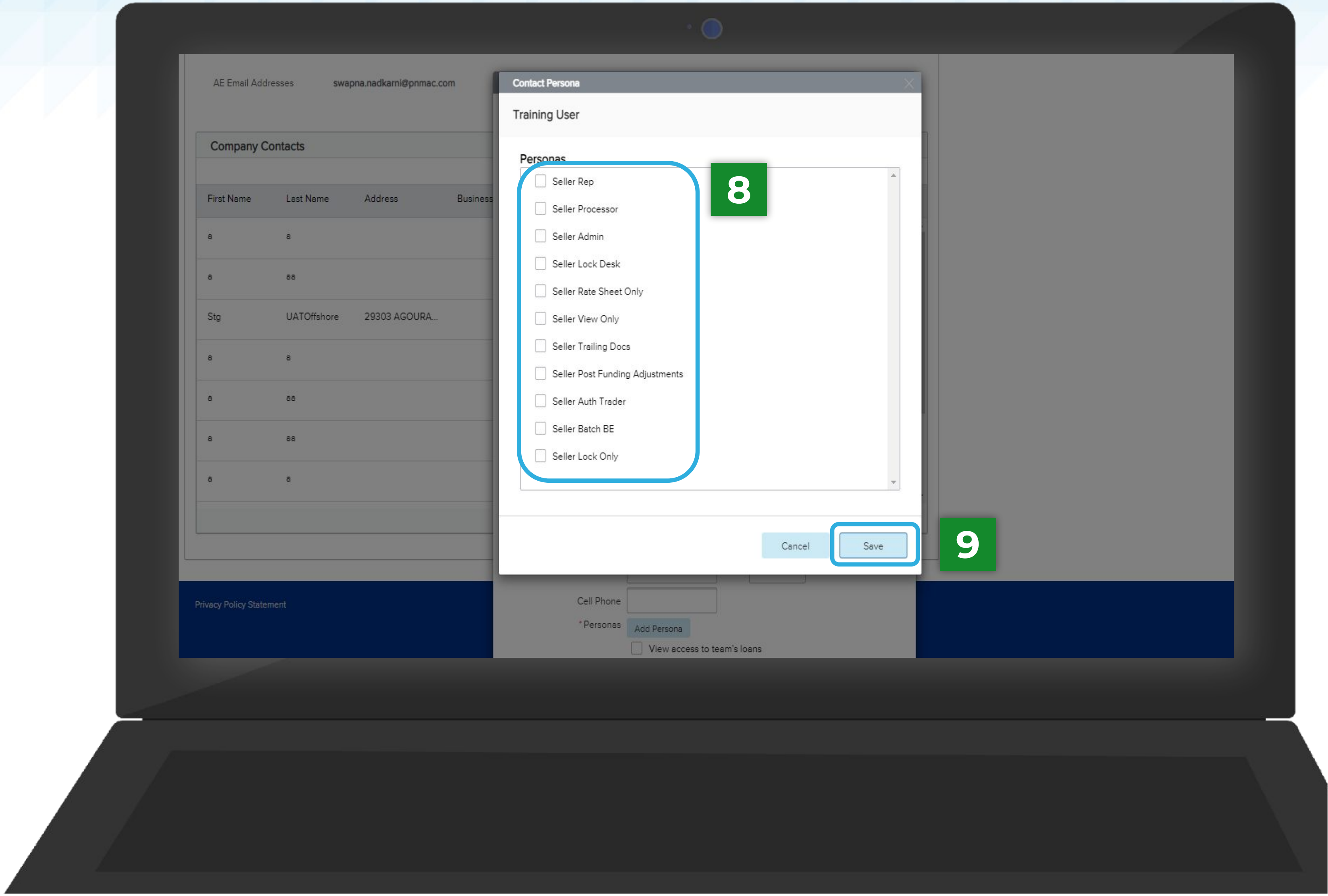


7 Click the ***Add Persona*** button to select the type of access for the new user.

User Administration

8 Select the ***Persona*** for the user. More than one *Persona may be selected.*

9 Click the ***Save*** button.



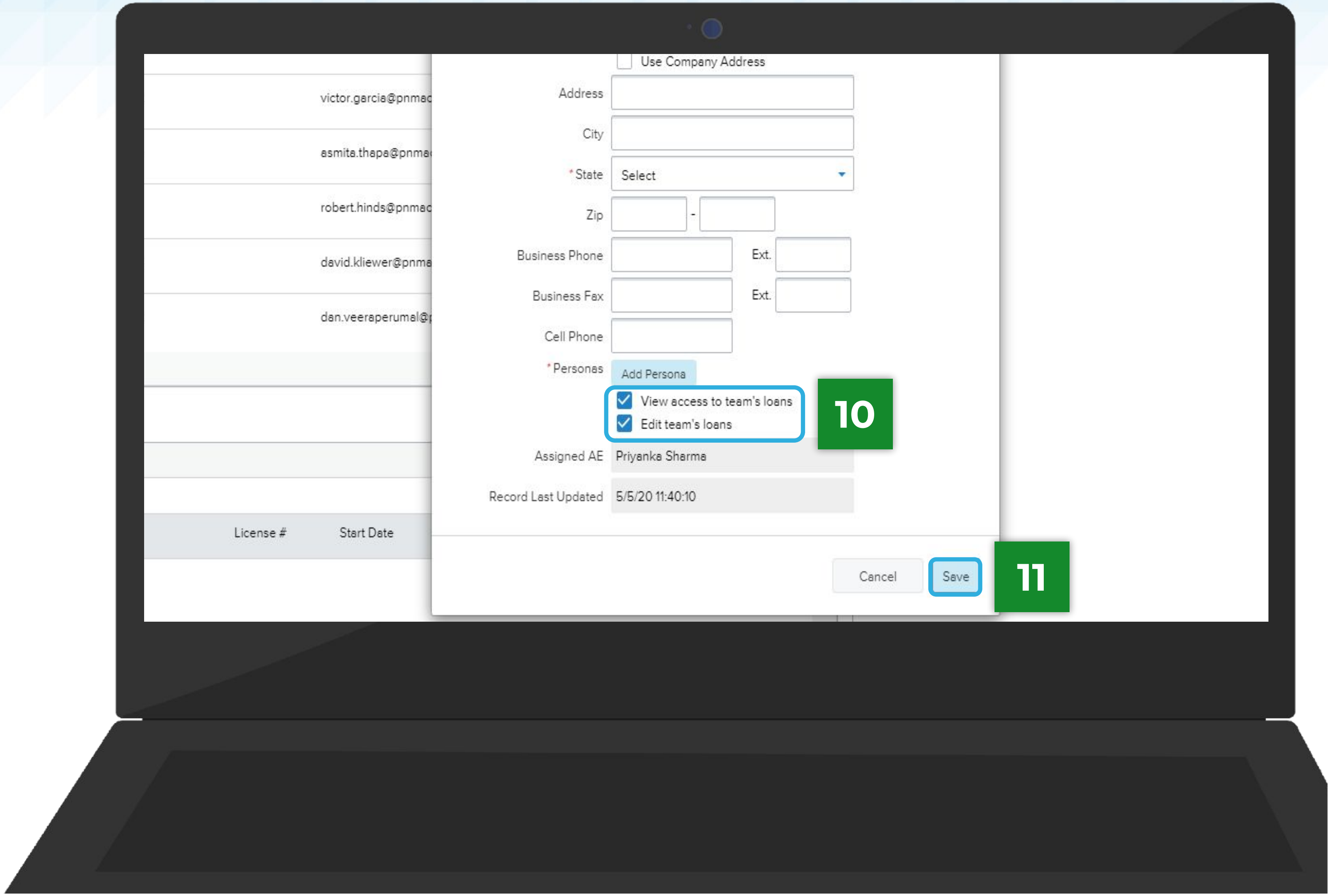
User Administration

10 Check the ***View acces to team's loans*** and ***Edit team's loans*** boxes.

This allows the user to access all the company's loans, otherwise users will only have access to loans they personally created.

In the event you do wish to restrict a user's access to only loans created by the user and not your entire pipeline (e.g. in the case of a LO or LP), leave the boxes unchecked.

11 Click ***Save*** button.



User Administration

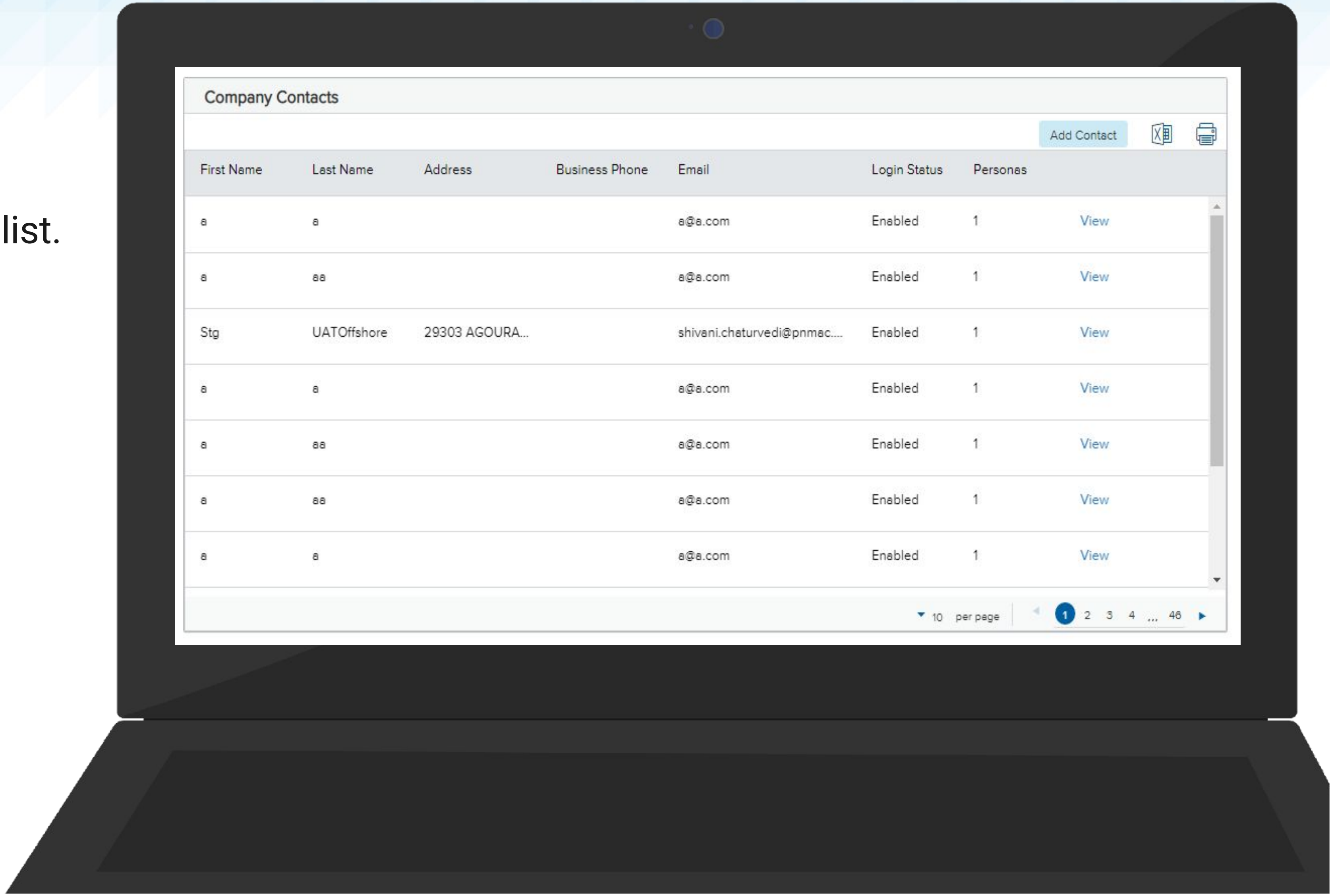
The user creation process is now completed. Now, the new user is displayed in the *Company Contact* list.

Once the process is complete, the new user receives an email with the login credentials and a temporary password.

Temporary password(s) may be changed in the first login.

Admins <u>do not</u> have access to set or change user passwords.

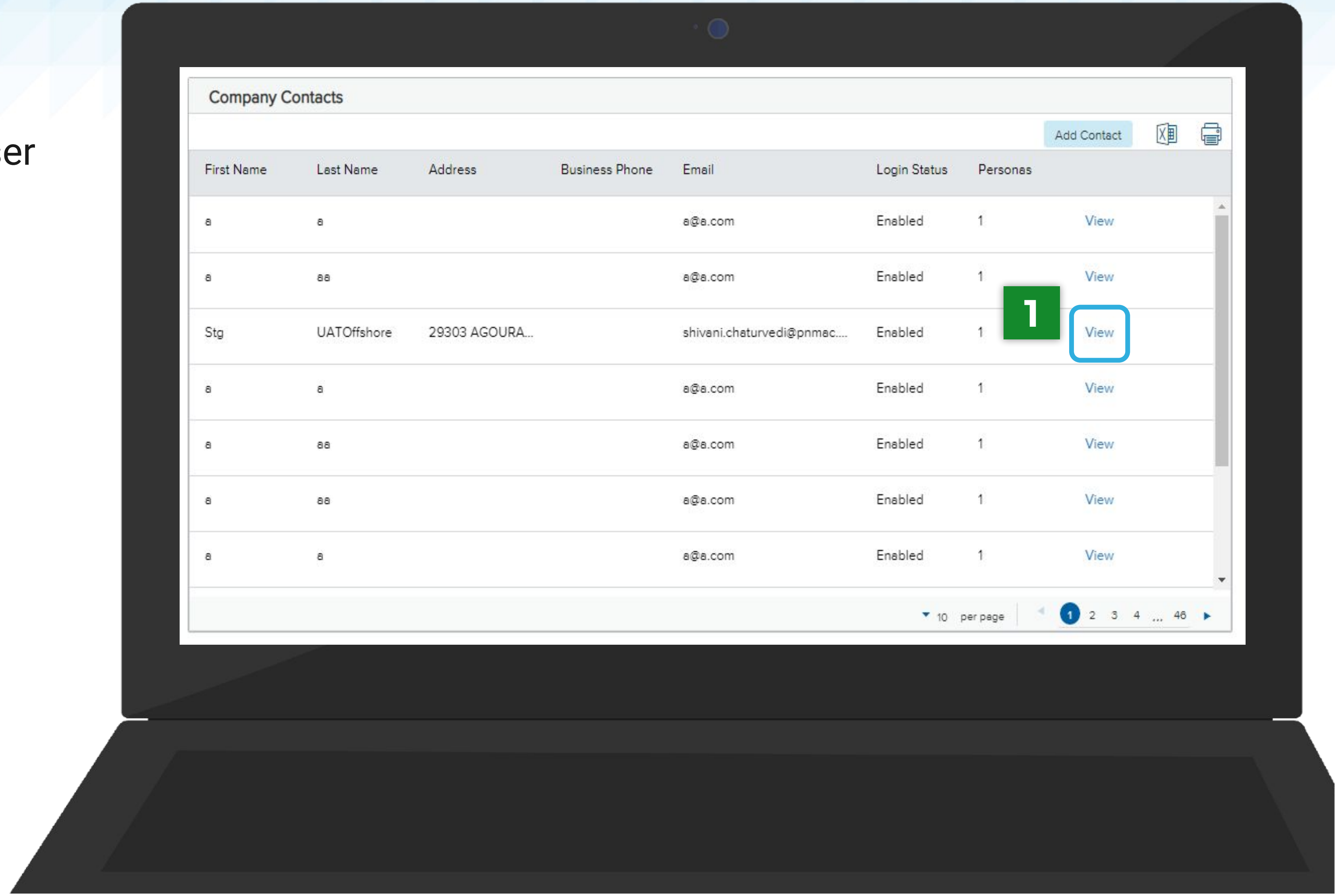
Select ***View*** and ***Disable*** to restrict company contacts that are no longer active.



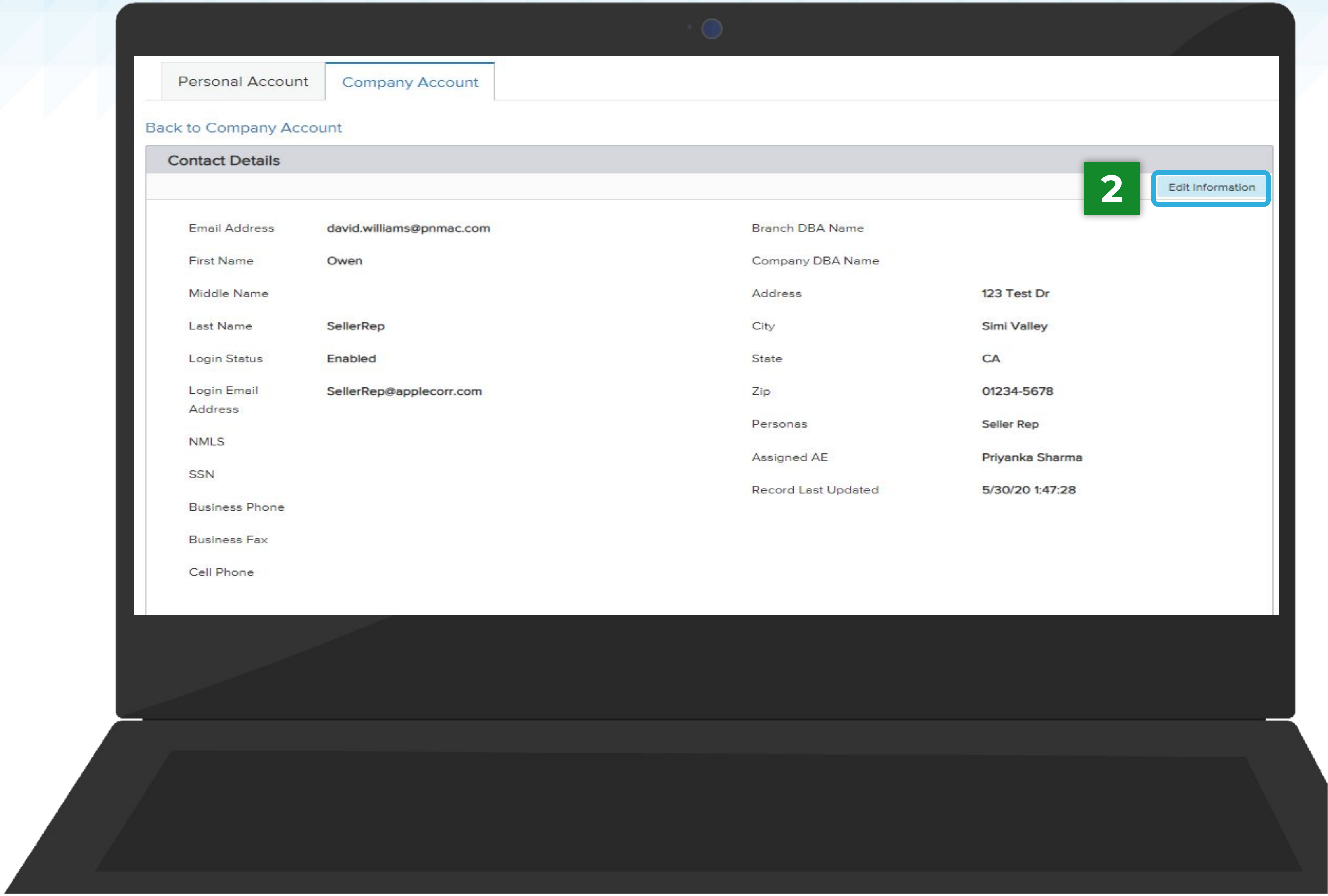
User Administration

Follow the next steps to disable user access:

1 Select ***View*** field on the user to disable access.



User Administration

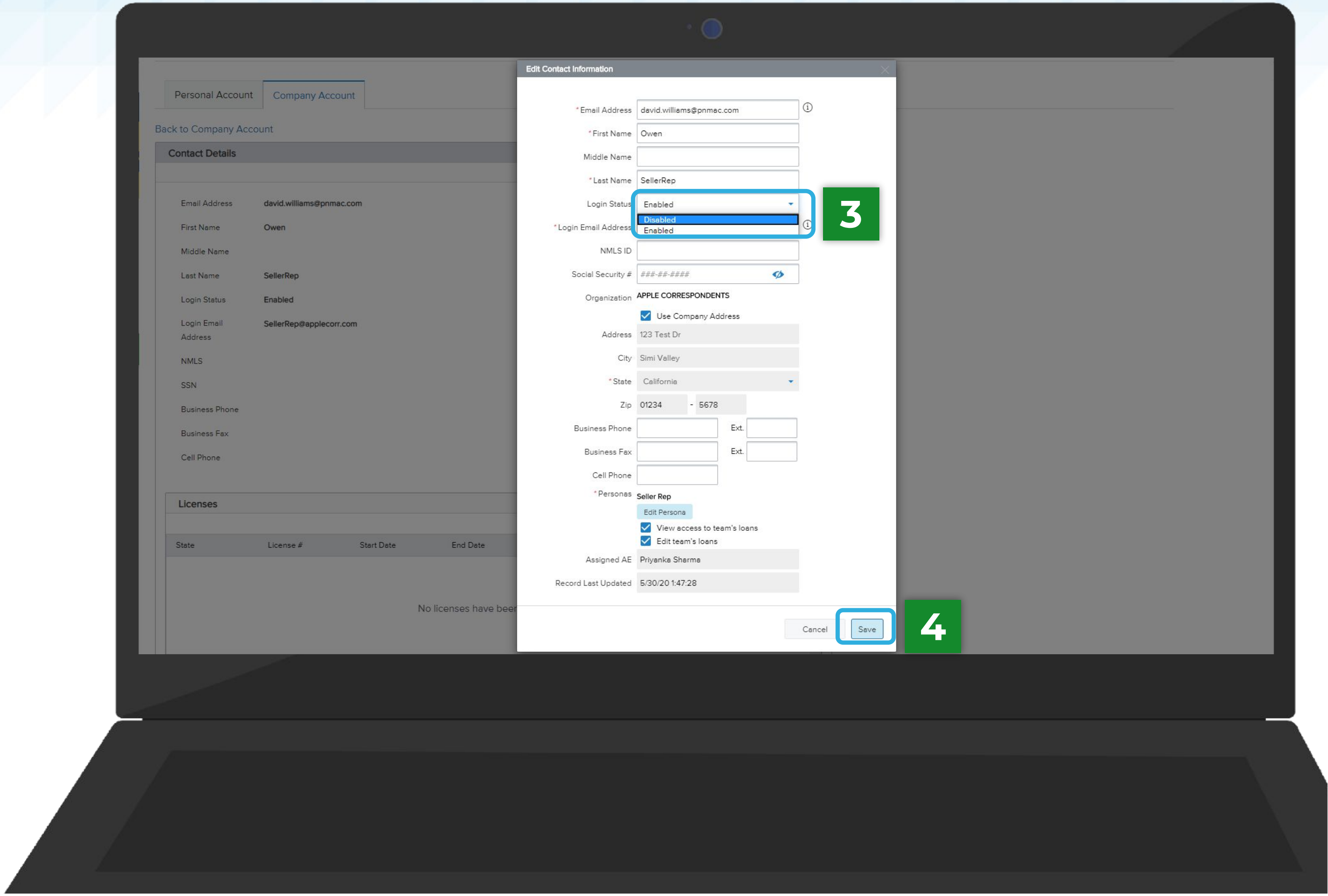


2 Select ***Edit information*** field. A popup will appear.

User Administration

3 On the ***Edit Contact Information*** popup, click on the drop down arrow in ***Login Status*** and select ***Disable***

4 Select ***Save*** to complete the process.



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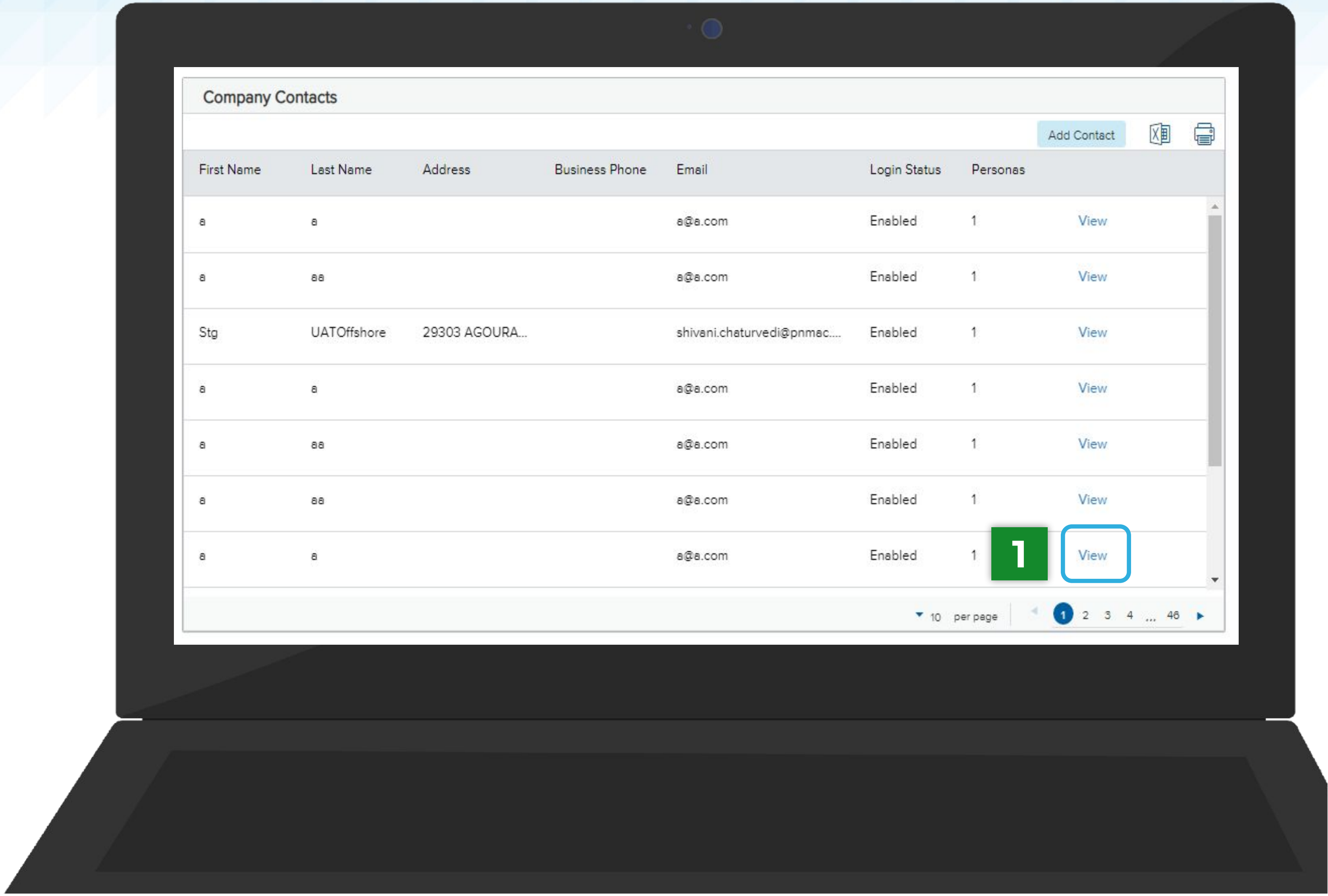
Configure User's Notifications

Configure User's Notifications

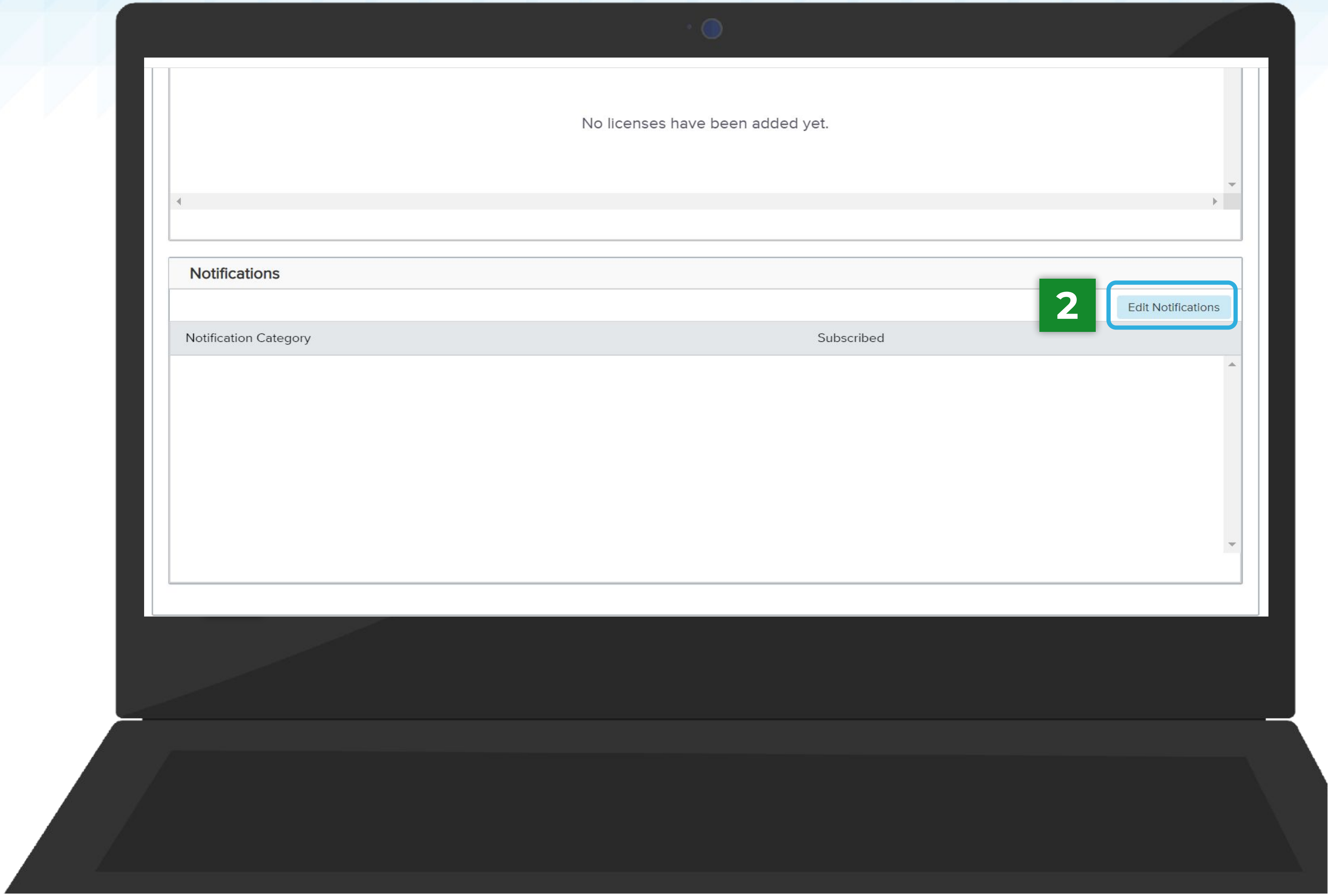
Follow the next steps to set up notifications for the user:

1. Click the ***View*** button of the user in the ***Company Contacts*** list.



Configure User's Notifications

2 In the new window, scroll down and click the ***Edit Notifications*** button in the ***Notifications*** section.

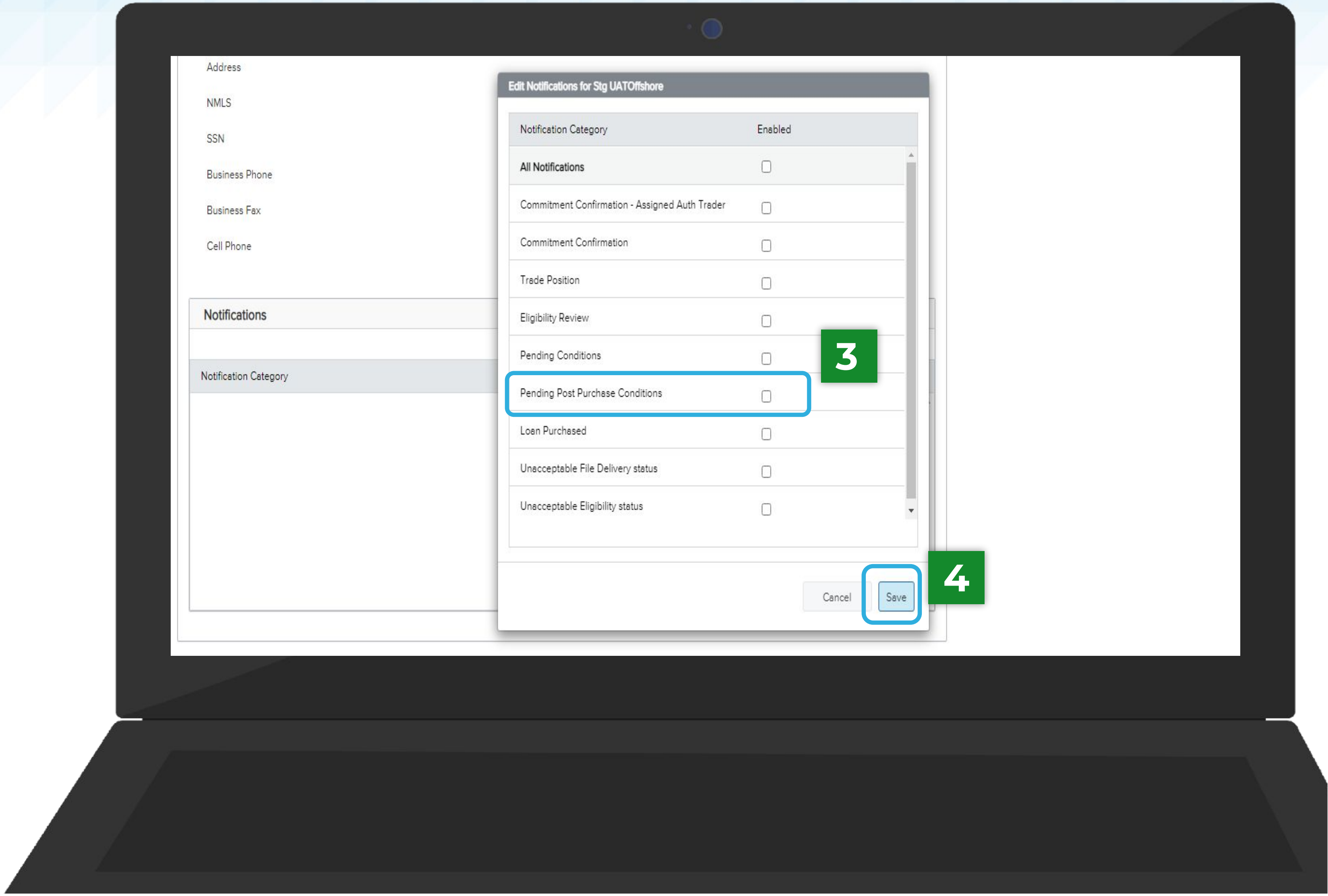


Configure User's Notifications

3 Check the boxes to enable email ***Notifications***.

All necessary notifications can be selected.

4 Click ***Save*** button.



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Learning takeaways from this case:

- How to set up a new user.
- How to configure the newly created user.
- How to disable a user.
- How to set up notifications for the new user.

THANK YOU!

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