

# Portal Web Admin

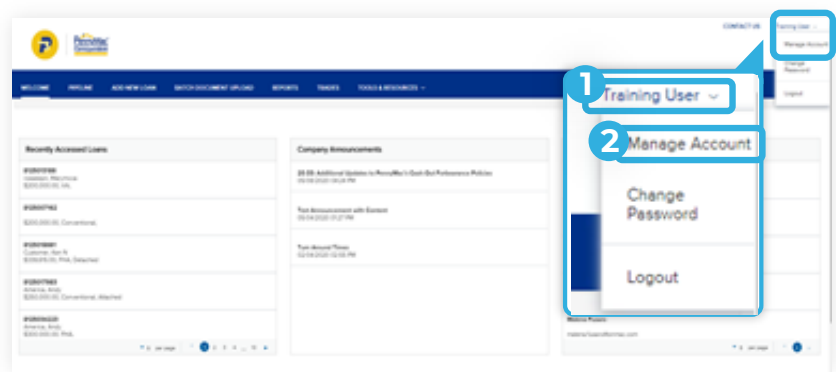
JOB AID

This Job Aid walks you through the functions available for the Admin Role in the new Portal. You will also find a step by step on how to perform each function.

**A** Follow the next steps create a new user:

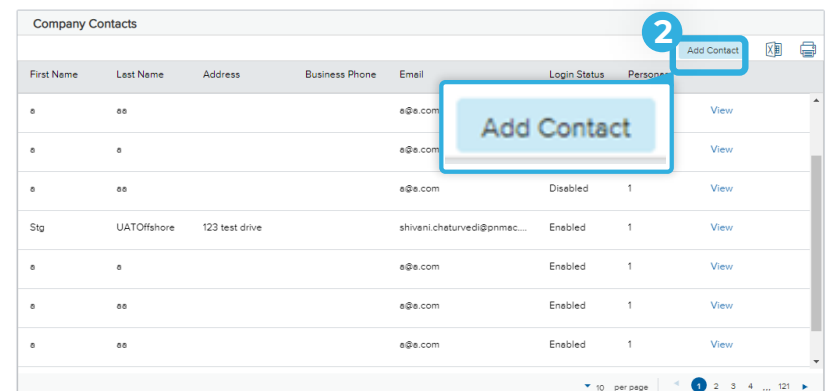
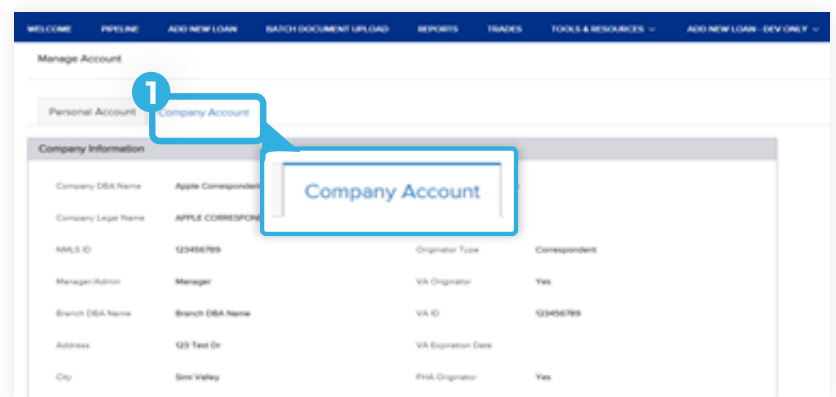
1. After logging into the portal, click on your user name in the upper right corner.
2. Once drop-down menu displays, click on Manage Account button.

*Remember! Only an Admin Role user can create new users in the system*



**B** Once in the *Manage Account* window:

1. Click the *Company Account* tab.
2. Scroll down and click the Add Contact button in the Company Contacts section

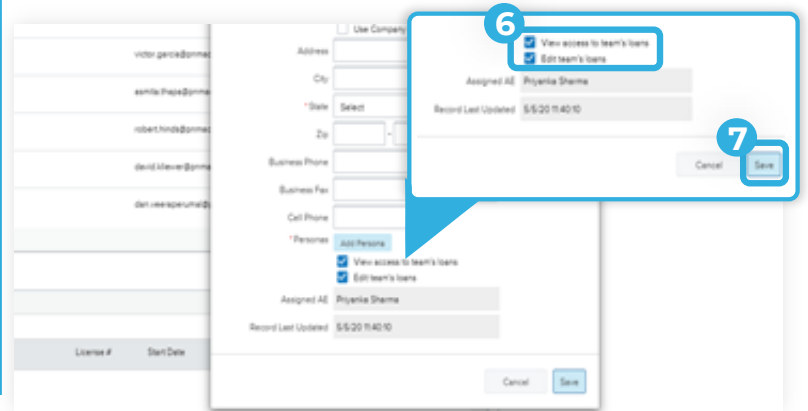
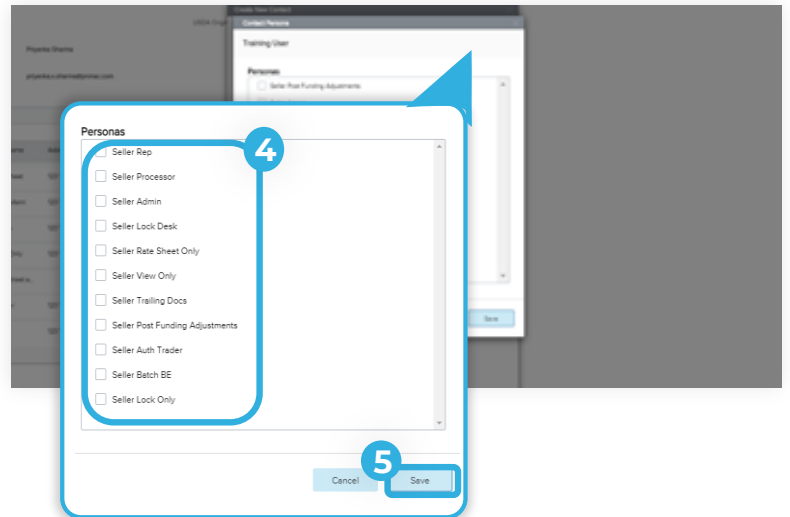
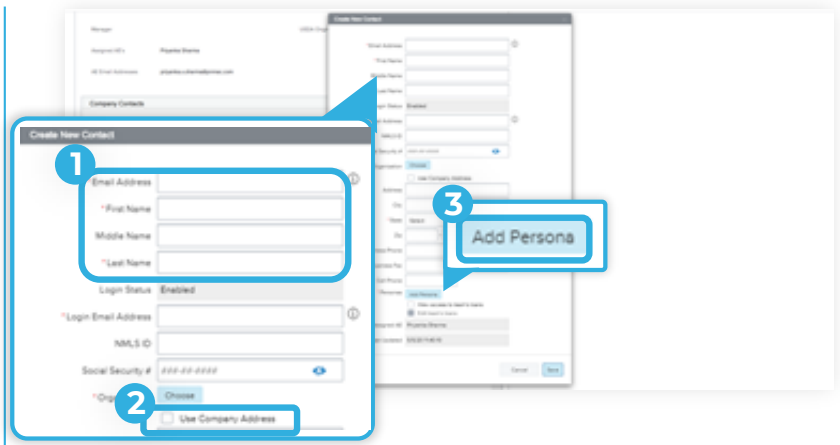


**C** Create New Contact window displays.

1. Insert the current password. Enter the required information in the following fields:
  - Email address
  - First and last name
  - Login Email address
  - Organization
2. Select Use Company Address check box to fill it with the selected organization's address or type a different one manually.
3. Click the Add Persona button to select the type of access for the new user.
4. Select the Persona for the user. More than one Persona may be selected.
5. Click the Save button.
6. Check the View access to team's loans and Edit team's loans boxes.
7. Click Save button.

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

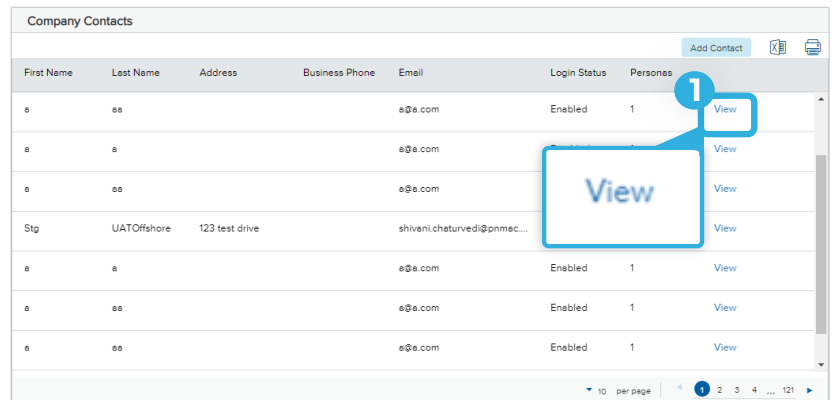
*In the event you do wish to restrict a user's access to only loans created by that user and not your entire pipeline (e.g. in the case of a LO or LP), leave the boxes unchecked.*



Now, let's review how to disable user access:

**A** Back on the Company Contacts section:

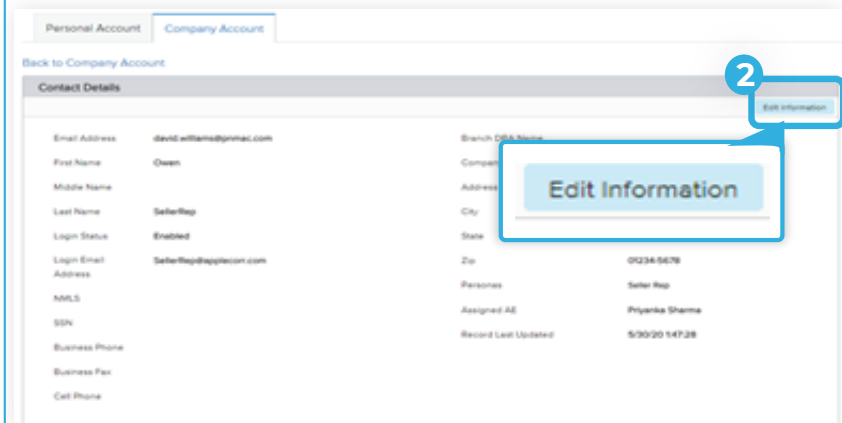
1. Select "View" field on the user to edit the users access.



The screenshot shows a table titled "Company Contacts" with columns: First Name, Last Name, Address, Business Phone, Email, Login Status, and Personas. A "View" button is highlighted with a blue box and a callout "1".

First Name	Last Name	Address	Business Phone	Email	Login Status	Personas	
	ee			e@e.com	Enabled	1	View
	e			e@e.com			View
	ee			e@e.com			View
Stg	UATOffshore	123 test drive		shivani.cheturvedi@pnmec...			View
e	e			e@e.com	Enabled	1	View
e	ee			e@e.com	Enabled	1	View
e	ee			e@e.com	Enabled	1	View

2. Click the Edit Information button.

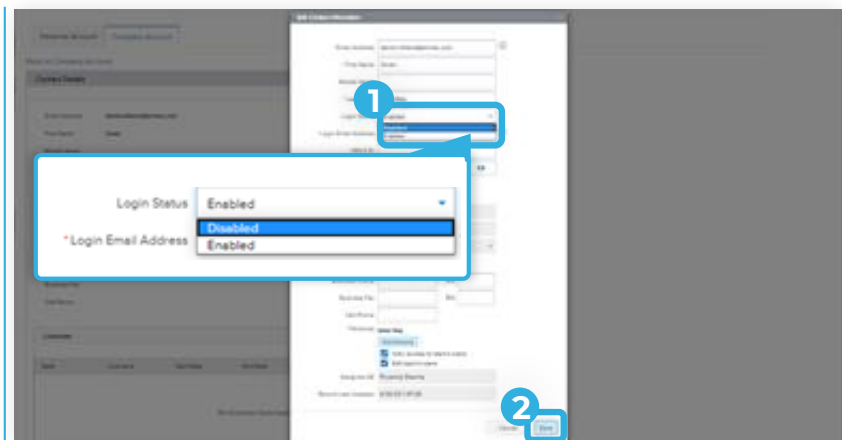


The screenshot shows the "Edit Information" form for a contact. The "Edit Information" button is highlighted with a blue box and a callout "2".

Contact Details	
Email Address	david.williams@pnmec.com
First Name	Owen
Middle Name	
Last Name	SellerRep
Login Status	Enabled
Login Email Address	SellerRep@appleicon.com
NMLS	
SSN	
Business Phone	
Business Fax	
Cell Phone	
Branch CBA State	
Company	
Address	
City	
State	
Zip	01234 5678
Personas	Seller Rep
Assigned AE	Priyanka Sharma
Record Last Updated	5/30/20 14:28

**B** Once the *Edit Contact Information* section displays:

1. Click on the drop down arrow in Login Status and select Disable.
2. Select Save to complete the process.



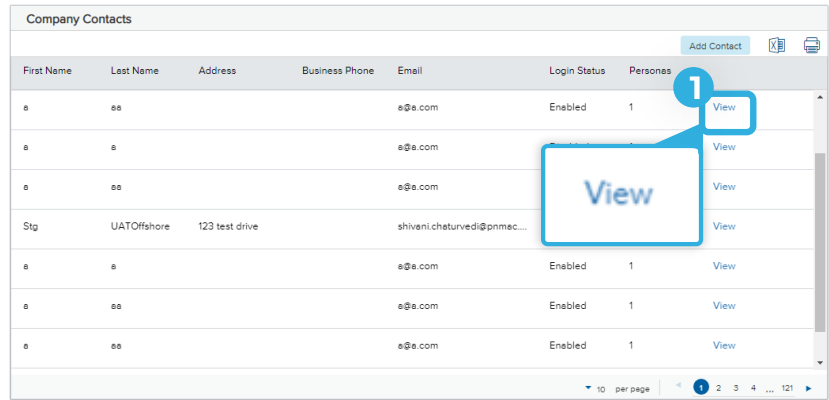
The screenshot shows the "Edit Contact Information" form with the "Login Status" dropdown menu open, showing "Disabled" selected. The "Save" button is highlighted with a blue box and a callout "2".

Login Status	Enabled
*Login Email Address	Disabled
	Enabled

Now, let's review how to setup user's notifications:

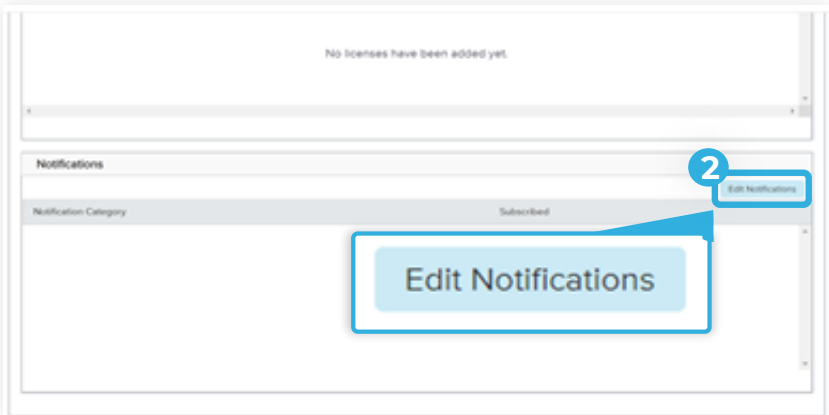
**A** Back on the Company Contacts section:

1. Select "View" field on the user to disable access.
2. Scroll down and click the Edit Notifications button in the Notifications section.



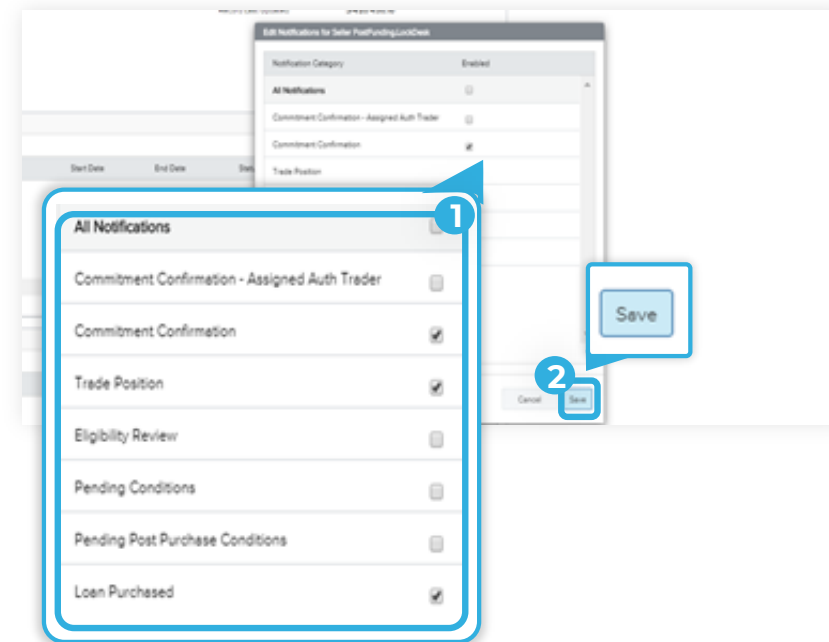
The screenshot shows a table titled "Company Contacts" with columns: First Name, Last Name, Address, Business Phone, Email, Login Status, and Personas. A "View" button is highlighted with a blue callout box and the number 1. The table contains several rows of contact information.

First Name	Last Name	Address	Business Phone	Email	Login Status	Personas
	ee			e@e.com	Enabled	1
	e			e@e.com		
	ee			e@e.com		
Stg	UATOffshore	123 test drive		shivani.cheturvedi@pnmec...		
e	e			e@e.com	Enabled	1
e	ee			e@e.com	Enabled	1
e	ee			e@e.com	Enabled	1



**B** Once the *Edit Notifications* window displays:

1. Check all the needed boxes to enable email Notifications.
1. Click Save button



On the following sections, we will go over User Roles and their assigned functions per user role:

## USER ROLES

### SELLER ADMIN

- Administration
- View Pricing
- Lock Loans
- Register Loans
- View Pipeline
- Upload & Submit Docs
- View Rate Sheets
- Submit Trailing Docs
- Request Post Funding Adjustments

### SELLER REP

- Register Loans
- View Pipeline
- Upload & Submit Docs
- Batch Document Upload
- Reports

### SELLER PROCESSOR

- View Pricing\*
- Register Loans
- View Pipeline
- Trade Management
- Reports
- Upload & Submit Docs
- Batch Document Upload
- Trailing Docs
- View Purchase Advice

\*On locked/allocated loans only

### SELLER LOCK ONLY

- View Pricing
- Lock Loans
- View Pipeline

\*This is a supplement to the Seller Rep role to allow the Seller Rep to lock loans.

### SELLER RATE SHEET ONLY

- Rate Sheet
- Receive Rate Sheet Notification

### SELLER LOCK DESK

- View Pricing
- Lock Loans
- Register Loans
- View Pipeline
- Trade Management
- Upload & Submit Docs
- Batch Document Upload
- Reports
- View Purchase Advice
- View Rate Sheets
- Post Funding Requests
- View Trailing Docs

### SELLER VIEW ONLY

- View Pricing\*
- View Pipeline
- View Trades
- View Documents / Conditions
- View Reports
- View Purchase Advice

\*On locked/allocated loans only

### SELLER TRAILING DOCS


- View Trailing Docs

### POST FUNDING ADJUSTMENTS

- Post Funding Requests

### ATTENTION!

Authorized Trader: Ability to execute trades with PennyMac. This is not a login role; it is used as a control for trading only.

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