

Client Readiness Training

# Introduction to P3

# Content

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

## 1 Introduction to P3

Introduction to P3 navigation and functionality

 **MODULE DURATION**  
**6 MINUTES**

## Scenario: Getting To Know P3

As a Pennymac external client, Amy will be working on a regular basis with P3.

Let's go through some basic key concepts that will help Amy navigate smoothly through P3.



# Introduction to P3

# P3 Quick Facts:

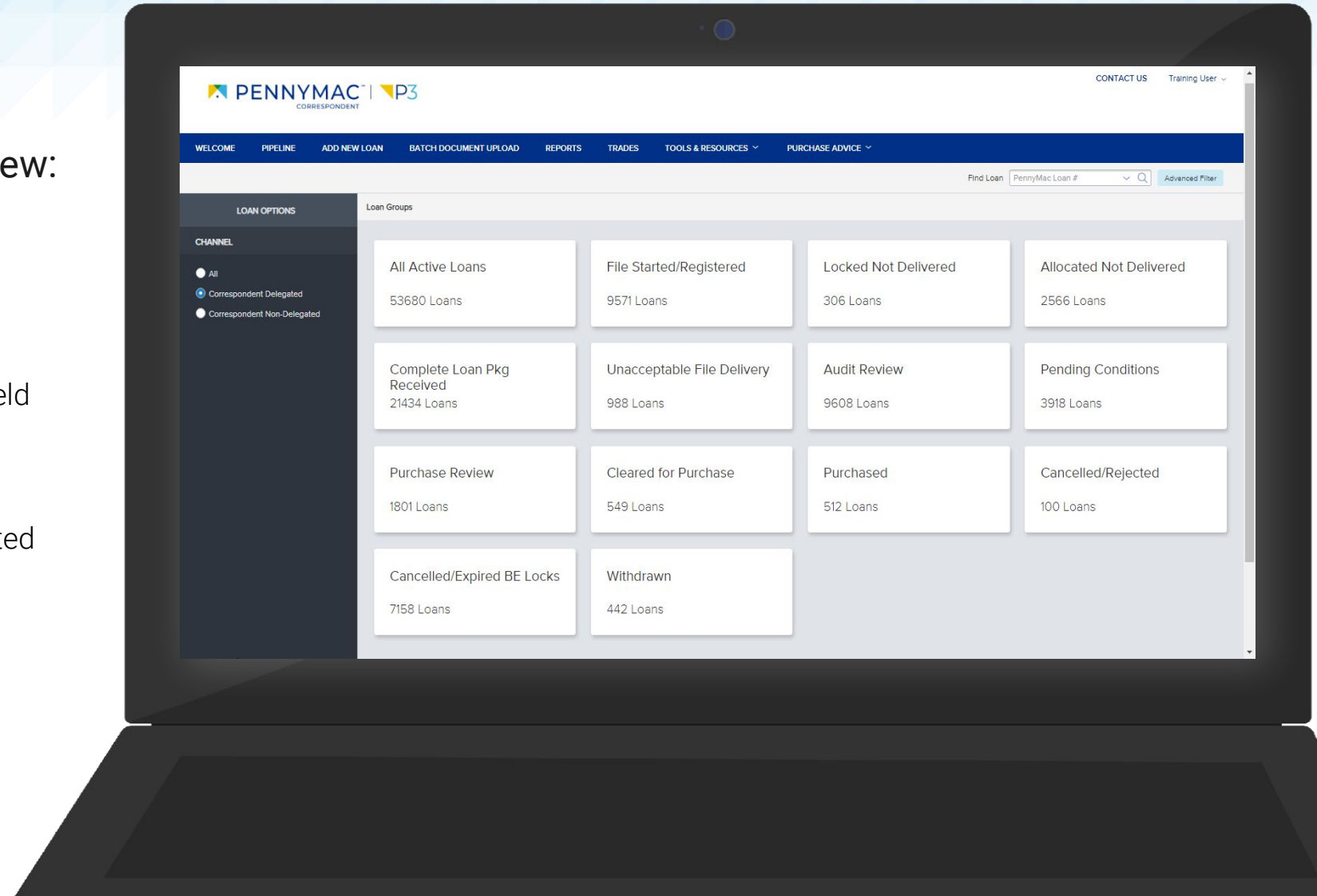
1. For an optimal experience use Google Chrome.
2. If you are assigned multiple personas, you will automatically default to the highest user access at sign-in.
3. Clients experiencing technical issues should be directed to:
  - 1-800-Penny38; press option 3 for technical support
  - Email: [PCG.Web.Support@pnmac.com](mailto:PCG.Web.Support@pnmac.com)

# Introduction to P3

Let's take a look at P3's Pipeline view:

## Contemporary Loan Pipeline:

- Modern user interface organized by loan status tiles
- Intuitive search via the "Find Loan" field using the Pennymac Loan #, Seller Loan #, or Borrower Name
- Advanced Search Filter
- Click on any title to view the associated loan list.

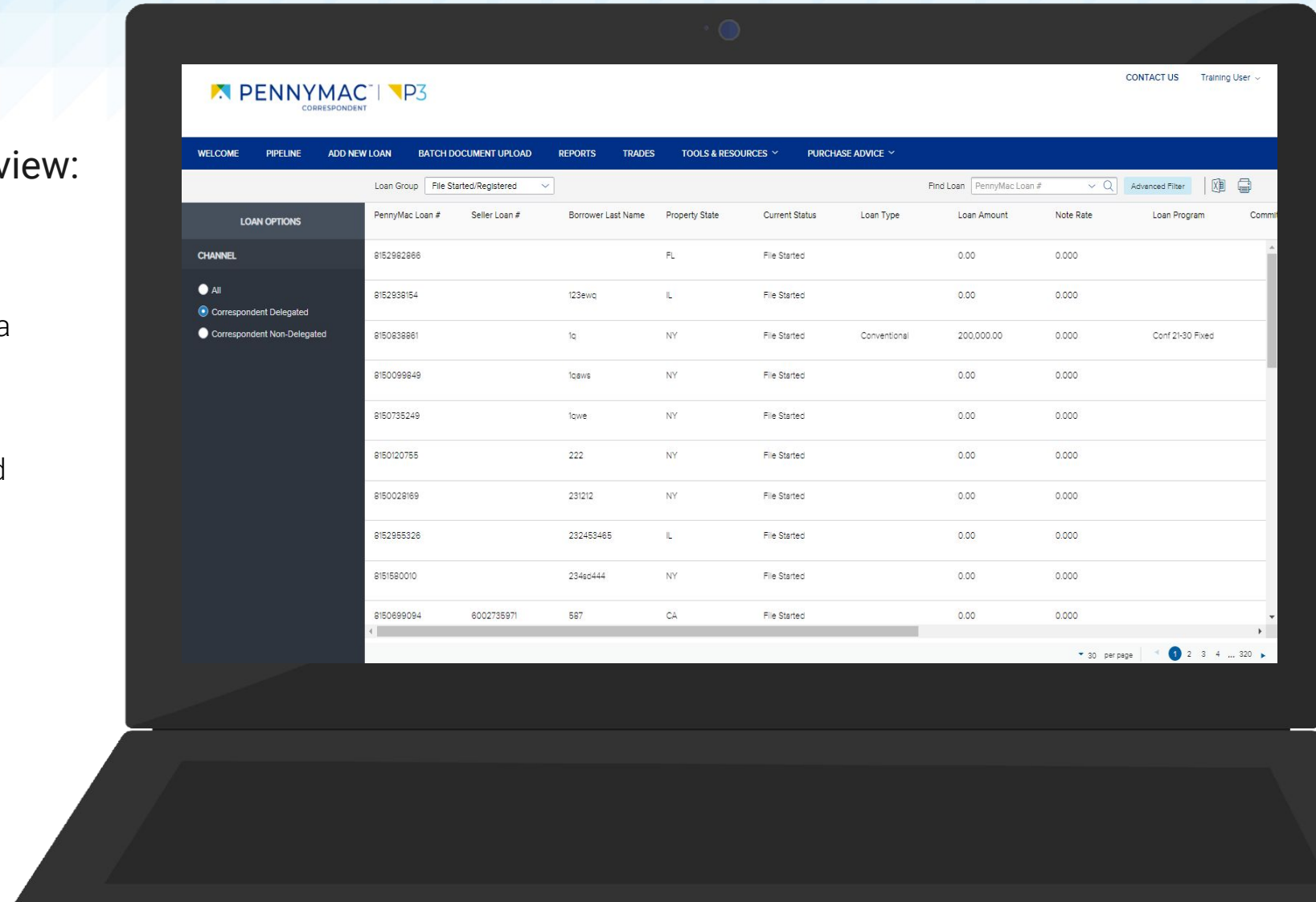


# Introduction to P3

Let's take a look at P3's Loan List view:

Loan List information:

- Loan list is displayed after selecting a pipeline tile
- Loans can be ordered by clicking on the desired column header
- Direct Search via the "Find Loan" field using the Pennymac Loan #, Seller Loan #, or Borrower Name
- Switch easily between tiles using the Loan Group dropdown



# Introduction to P3

Let's take a look at P3's Loan Summary view:

Loan Summary information:

- Click on any loan to view the corresponding Loan Summary Page

The screenshot shows the P3 Loan Summary page for a loan titled "TEST LOAN Test LN". The page features a navigation menu on the left with options like "LOAN SUMMARY", "PRODUCT PRICING & LOCK", "DOCUMENTS", "CONDITIONS", "PURCHASE ADVICE", and "LOAN ACTIONS". The main content area displays a progress bar with four stages: "File Started", "Loan Pkg Delivery", "In Review", and "Purchased", all marked as complete. Below the progress bar, there are several key information boxes: "Conditions" (3 Open Conditions), "Key Dates" (Complete Loan Package Submission Date: 2/6/2022, Purchase Date: 2/7/2022, Last Conditions Uploaded Date: 2/6/2022), "Locked 4.000%", and a table of loan details.

Lock Date	Commitment Type	Loan Program	Document Type
2/6/2022	Best Efforts	Conf 21-30 Fixed	Full
Lock Expiration Date	Delivery Type	Loan Amount	Occupancy Type
3/23/2022	Individual Best Efforts	\$200,000.00	Primary Residence
Days To Lock Expiration	Commitment Number	Loan Purpose	
44	--	Purchase	



# Introduction to P3

## Reports in P3:



### Eligibility Conditions Report

Non-delegated only report



### Pre-purchase Conditions Report

Loans that have open conditions.



### Allocated Not Delivered

Mandatory trade loans that are locked but have not yet been submitted to PennyMac



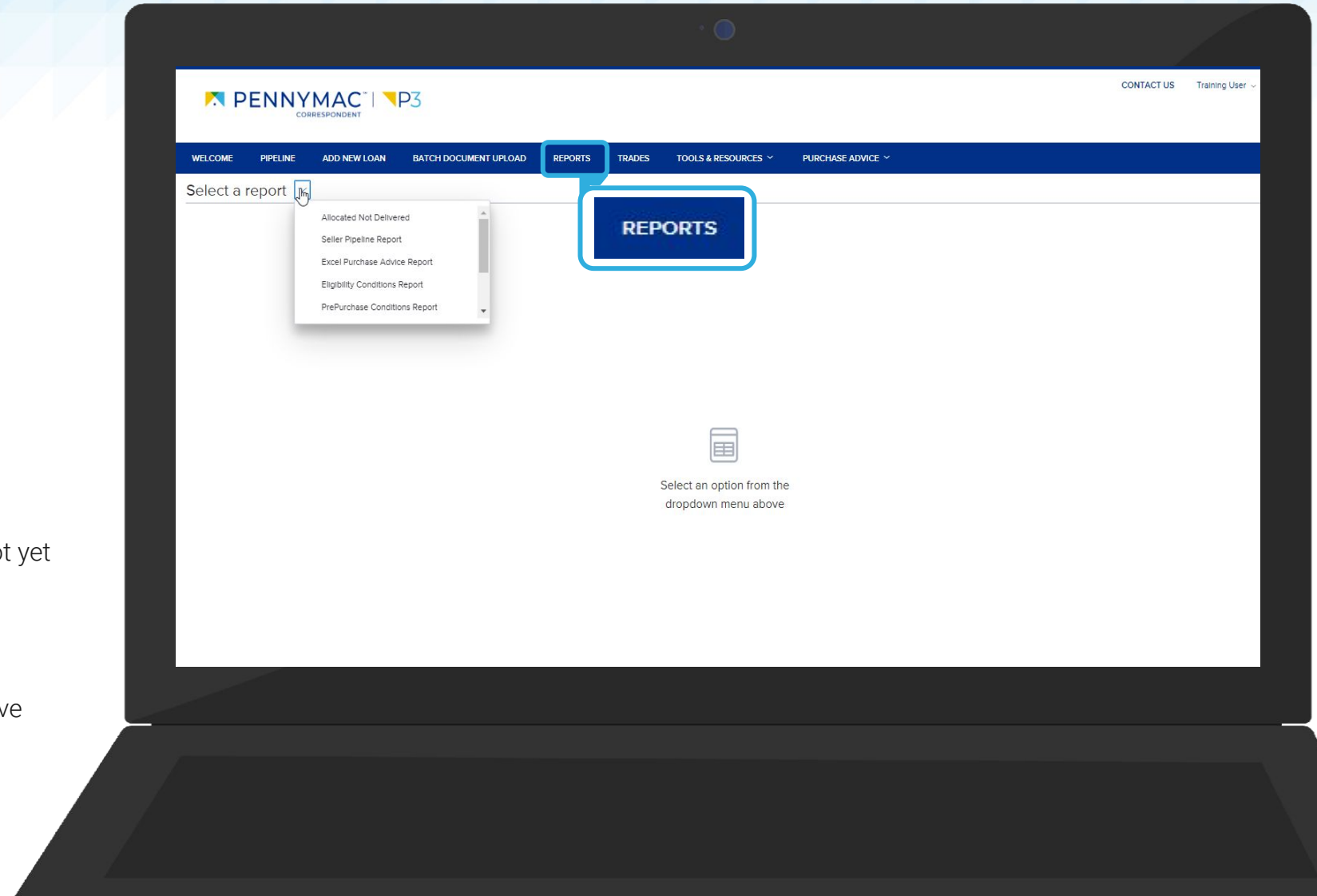
### Seller pipeline Report:

Downloadable version of the data from the all active loans tile on the pipeline tab



### Excel Purchase advice report:

Gives the details on how the client was paid for a particular loan, showing this for all the loans.



# Introduction to P3

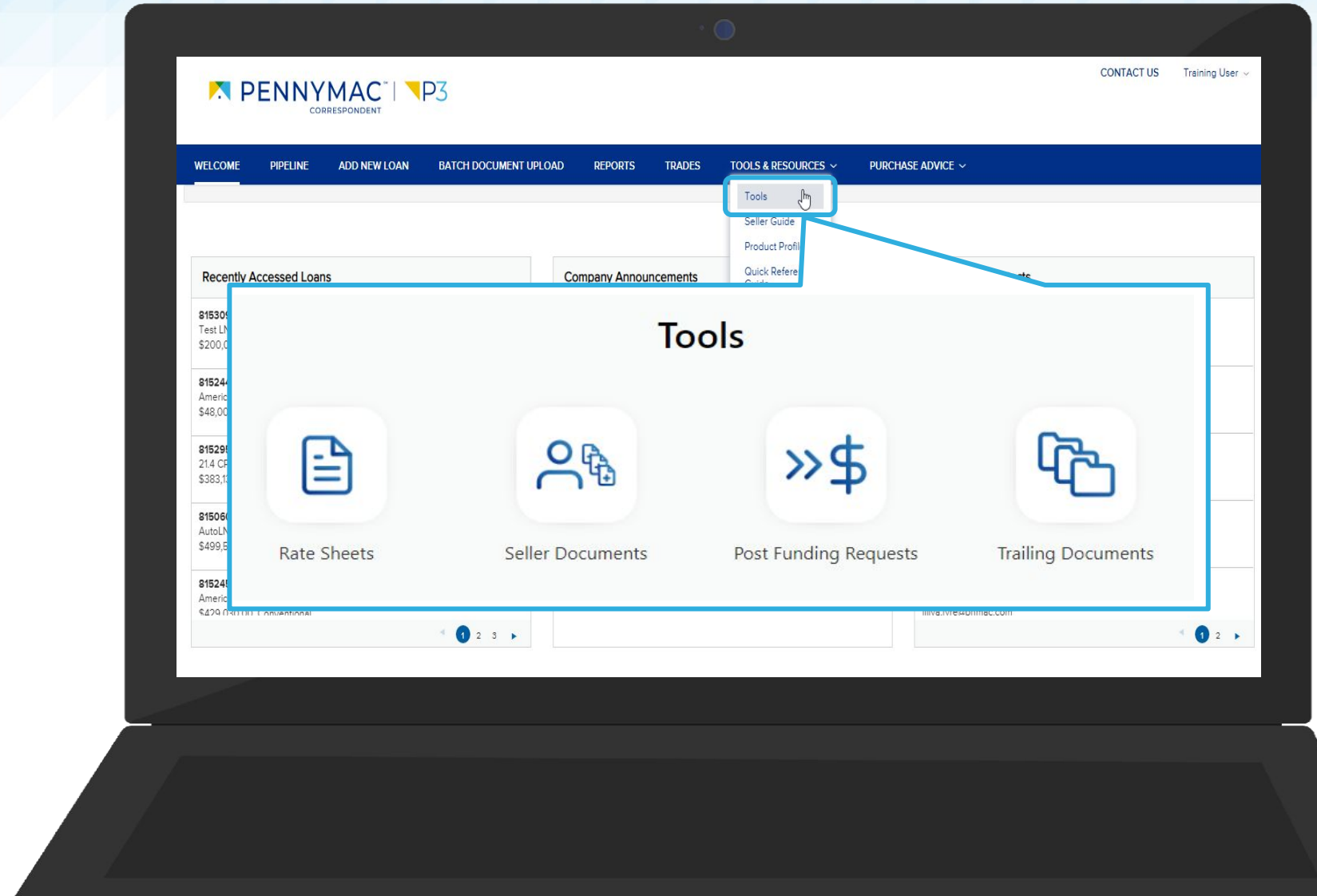
Let's take a look at P3's Tools & Resources tab:

In P3, the Tools and Resources tab hosts applications you may have experience with

- Rate Sheets
- Seller Documents
- Post Funding Requests
- Trailing Documents



Users will only see applications they have been granted access to via user persona.



## Learning takeaways from this case:

- ✓ Overview on how P3 works
- ✓ Understanding P3 functionalities
- ✓ Understanding of how to navigate through the new interface.



**THANK  
YOU!**

