

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:

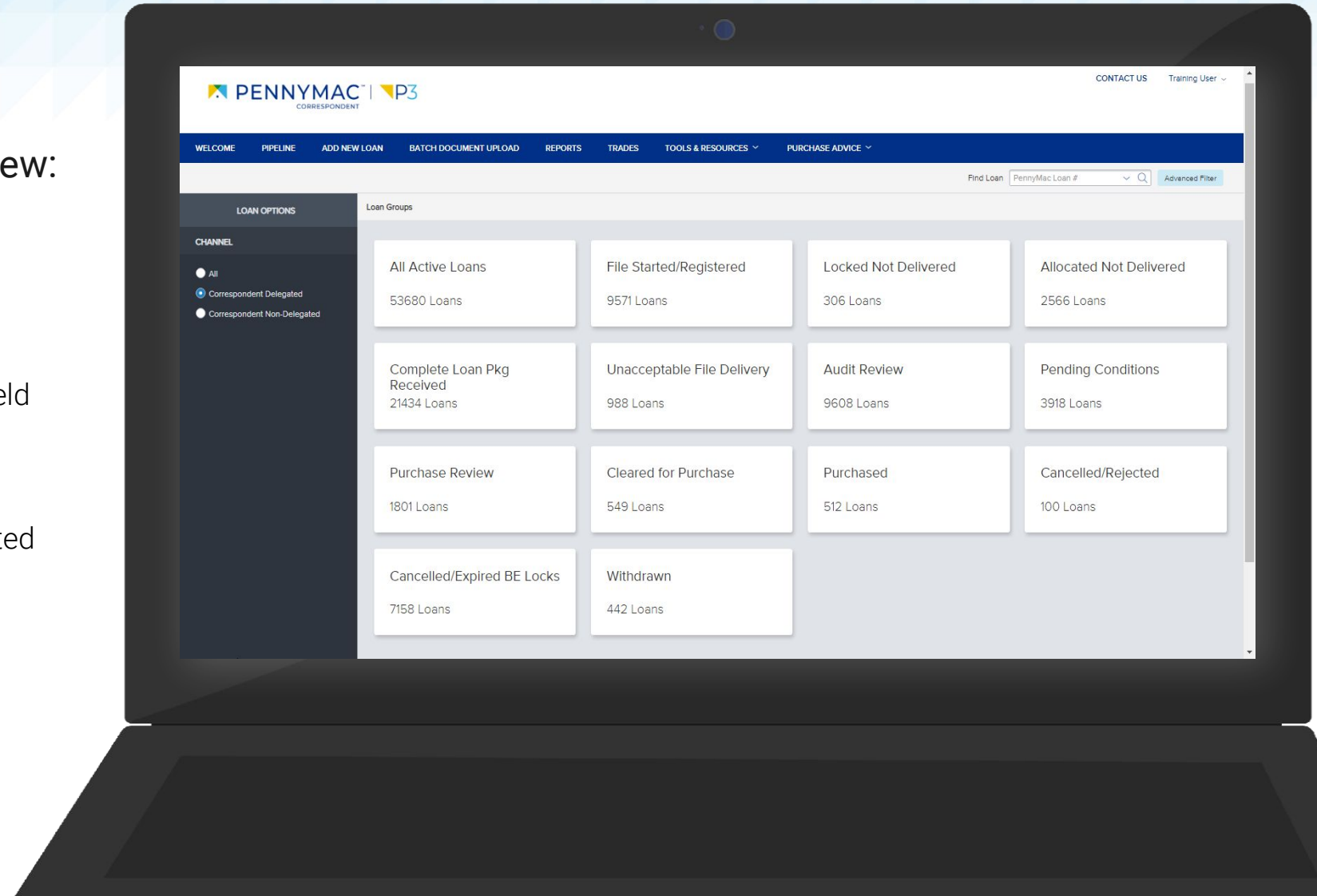
1. For an optimal experience use Google Chrome.
2. If you are assigned multiple personas, you will automatically default to the highest user access at sign-in.
3. Clients experiencing technical issues should be directed to:
 - 1-800-Penny38; press option 3 for technical support
 - Email: PCG.Web.Support@pnmac.com

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.



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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

PennyMac Loan #	Seller Loan #	Borrower Last Name	Property State	Current Status	Loan Type	Loan Amount	Note Rate	Loan Program	Comm
8152982886			FL	File Started		0.00	0.000		
8152939154		123ewq	IL	File Started		0.00	0.000		
8150838861		1a	NY	File Started	Conventional	200,000.00	0.000	Conf 21:30 Fixed	
8150099849		1caws	NY	File Started		0.00	0.000		
8150735249		1owe	NY	File Started		0.00	0.000		
8150120755		222	NY	File Started		0.00	0.000		
8150028169		231212	NY	File Started		0.00	0.000		
8152955326		232453465	IL	File Started		0.00	0.000		
8151580010		234qc444	NY	File Started		0.00	0.000		
8150699094	6002735971	567	CA	File Started		0.00	0.000		

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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 displays the P3 Loan Summary page. At the top, the PENNYMAC CORRESPONDENT logo is visible, along with a navigation menu containing 'WELCOME', 'PIPELINE', 'ADD NEW LOAN', 'BATCH DOCUMENT UPLOAD', 'REPORTS', 'TRADES', 'TOOLS & RESOURCES', and 'PURCHASE ADVICE'. The page title is 'TEST LOAN Test LN'. A sidebar on the left lists navigation options: 'LOAN SUMMARY', 'PRODUCT PRICING & LOCK', 'DOCUMENTS', 'CONDITIONS', 'PURCHASE ADVICE', and 'LOAN ACTIONS'. The main content area features a progress bar with four steps: 'File Started', 'Loan Pkg Delivery', 'In Review', and 'Purchased'. Below the progress bar, there are three summary cards: 'Conditions' (3 Open Conditions), 'Key Dates' (listing submission, purchase, and upload dates), and 'Locked 4.000%' (listing lock date, expiration, and days to lock). To the right, there are two columns of loan details including commitment type, loan program, amount, and purpose.

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

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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



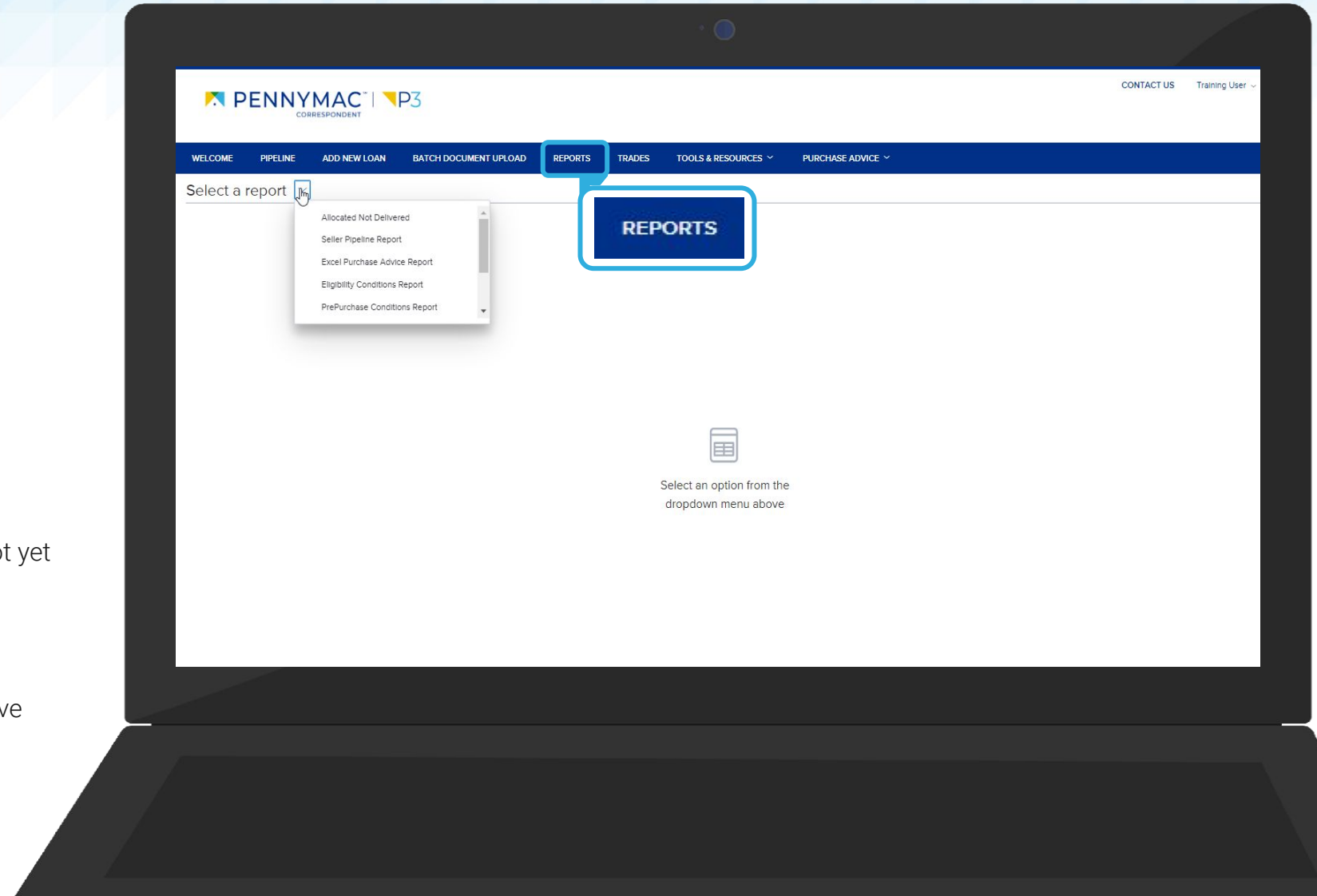
Seller pipeline Report:

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.



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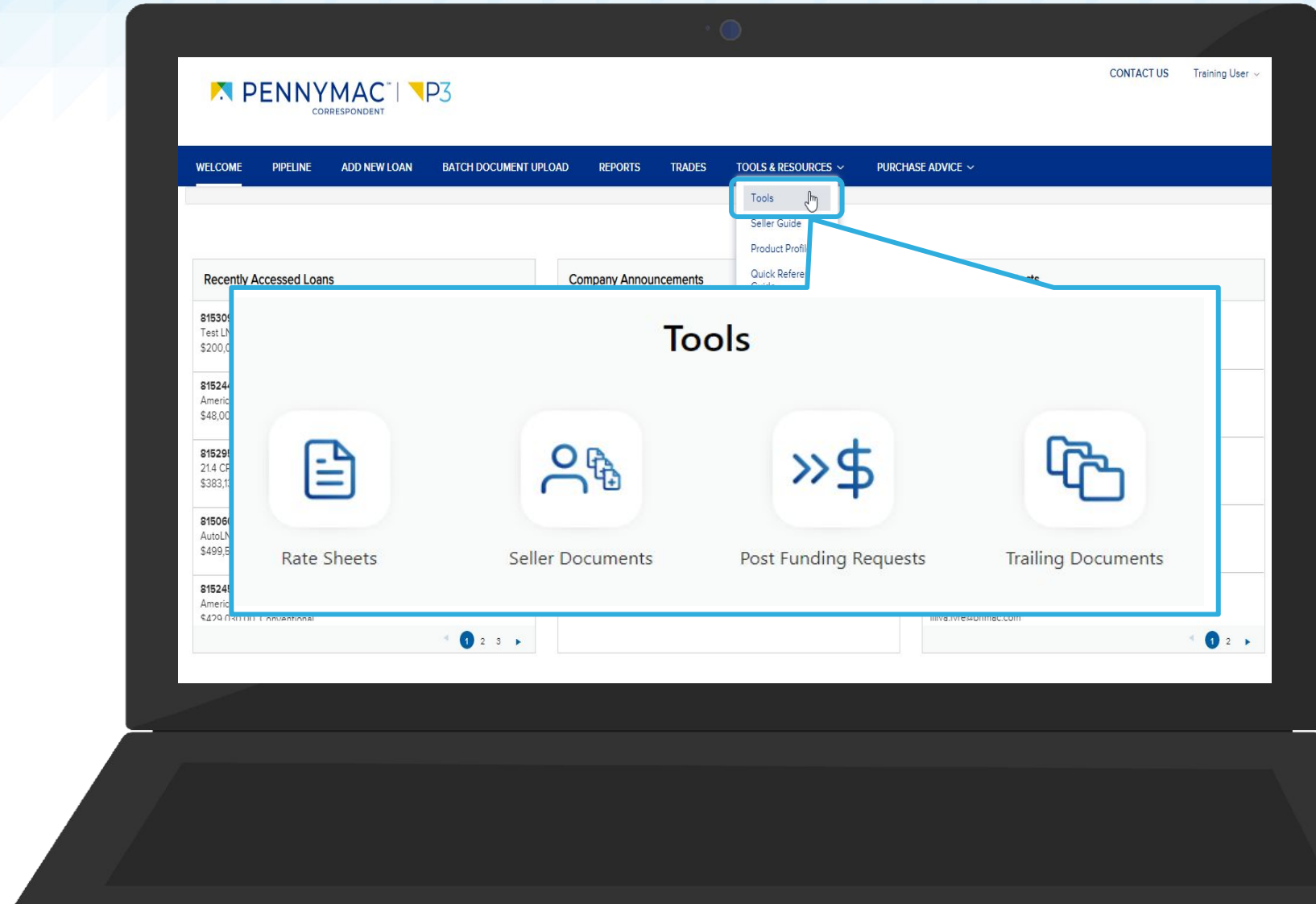
Let's take a look at P3's Tools & Resources tab:

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!**

