PENNYMAC CORRESPONDENT | P3

Client Readiness Training

Introduction to P3

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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

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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:

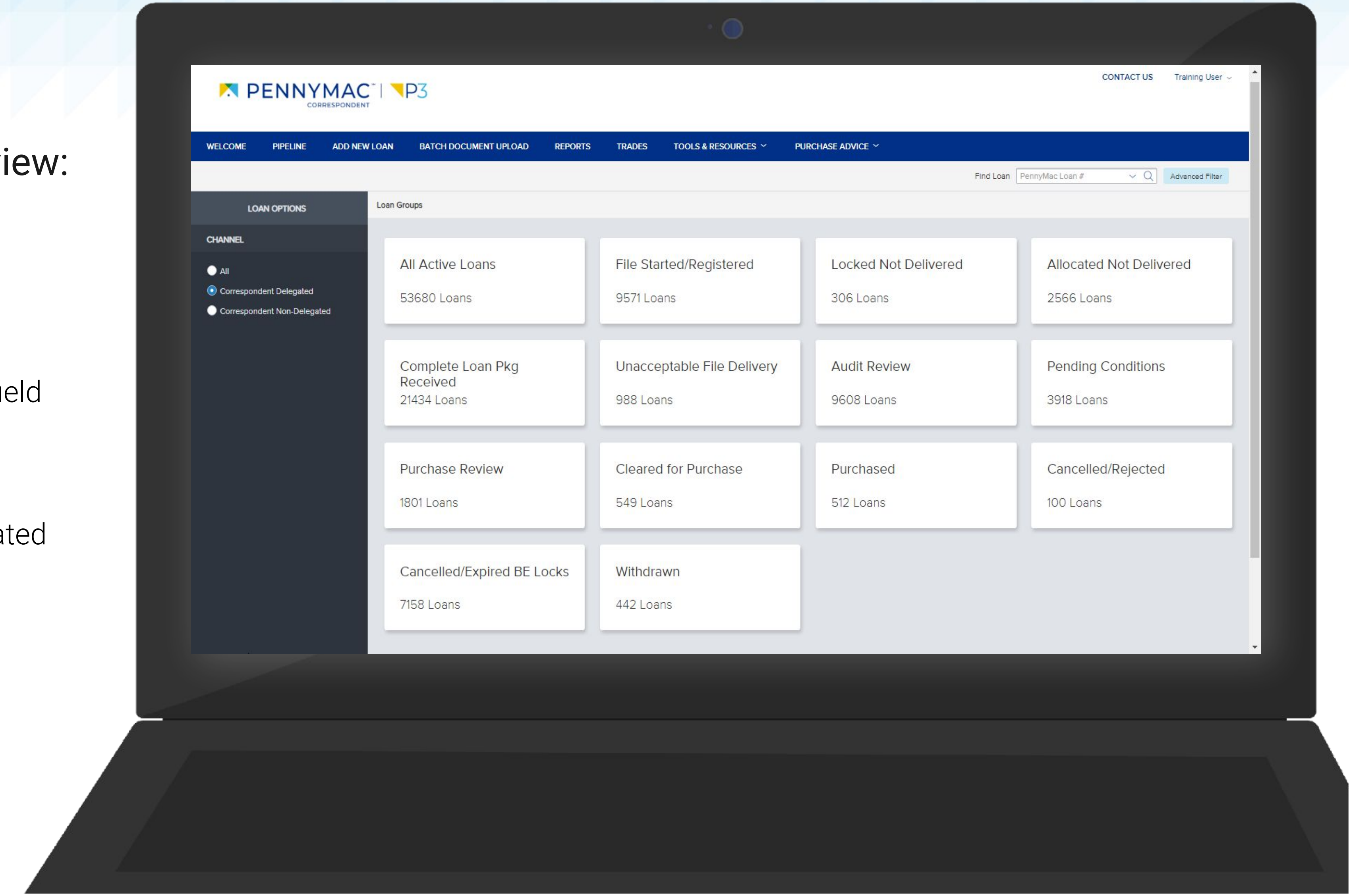
1. **For an optimal experience use Google Chrome.**
2. **If you are assigned multiple personas, you will automatically default to the highest user access at sign-in.**
3. **Clients experiencing technical issues should be directed to:**
   - 1-800-Penny38; press option 3 for technical support
   - Email: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

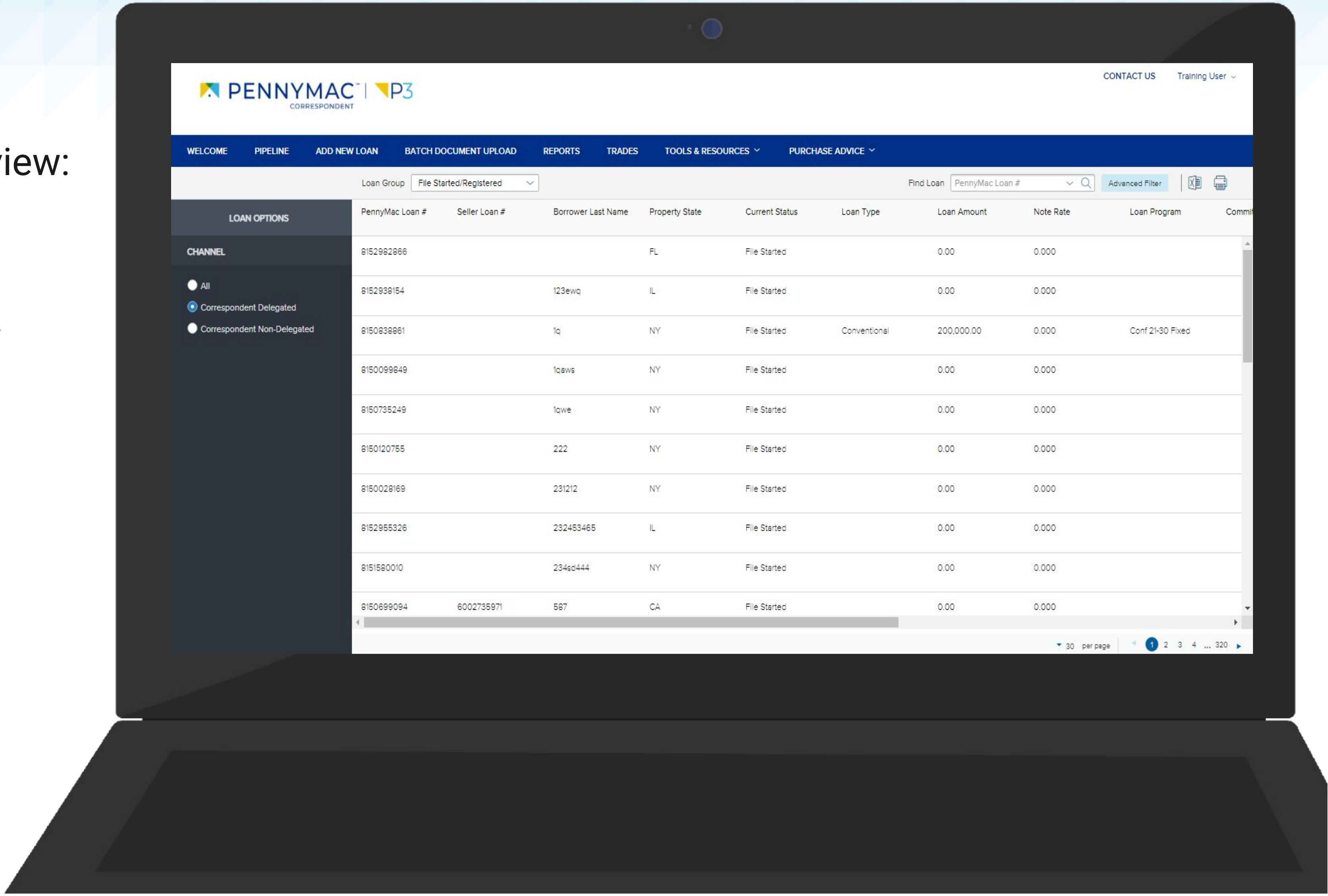


Introduction to P3

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

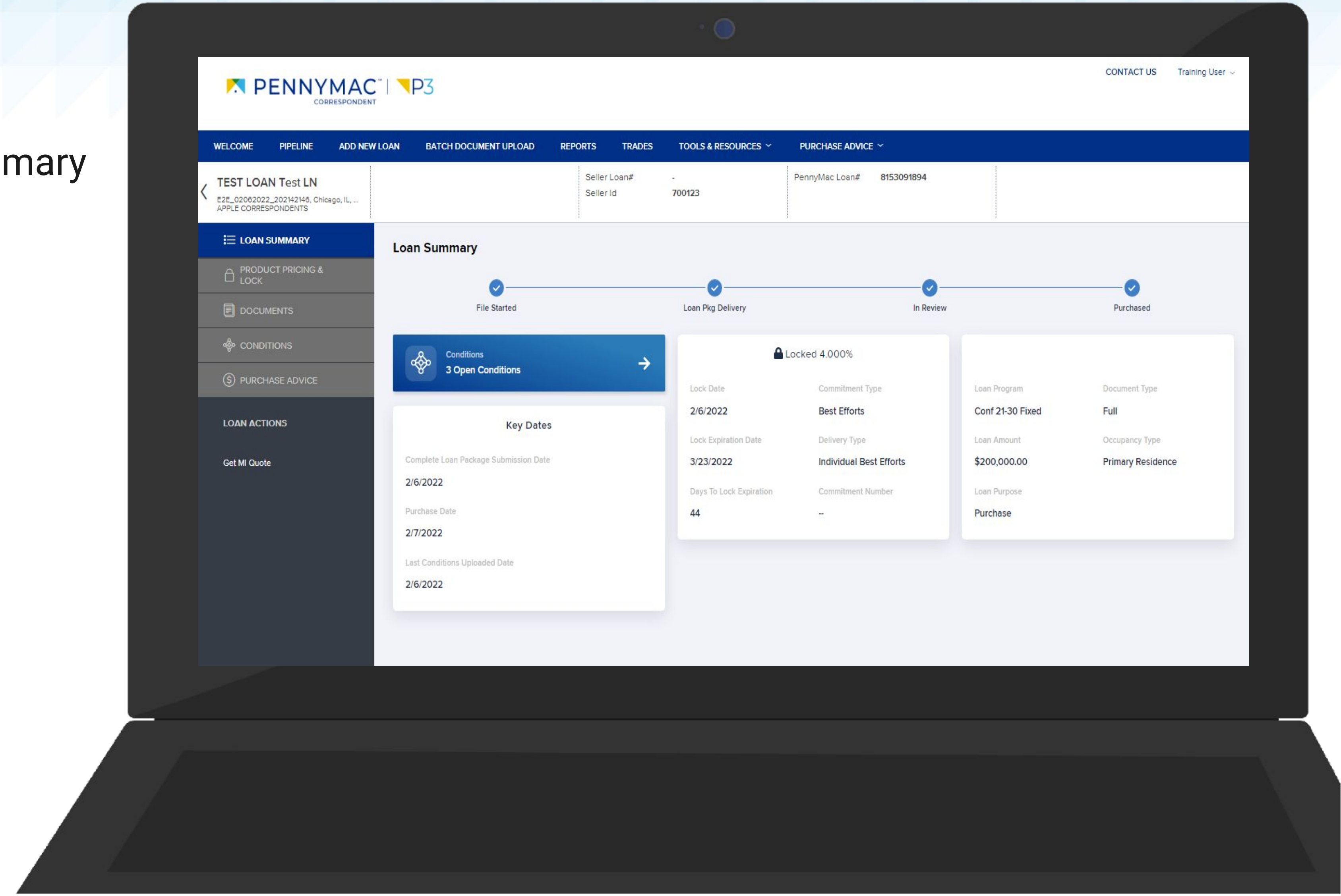


Introduction to P3

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



Introduction to P3

Reports in P3:

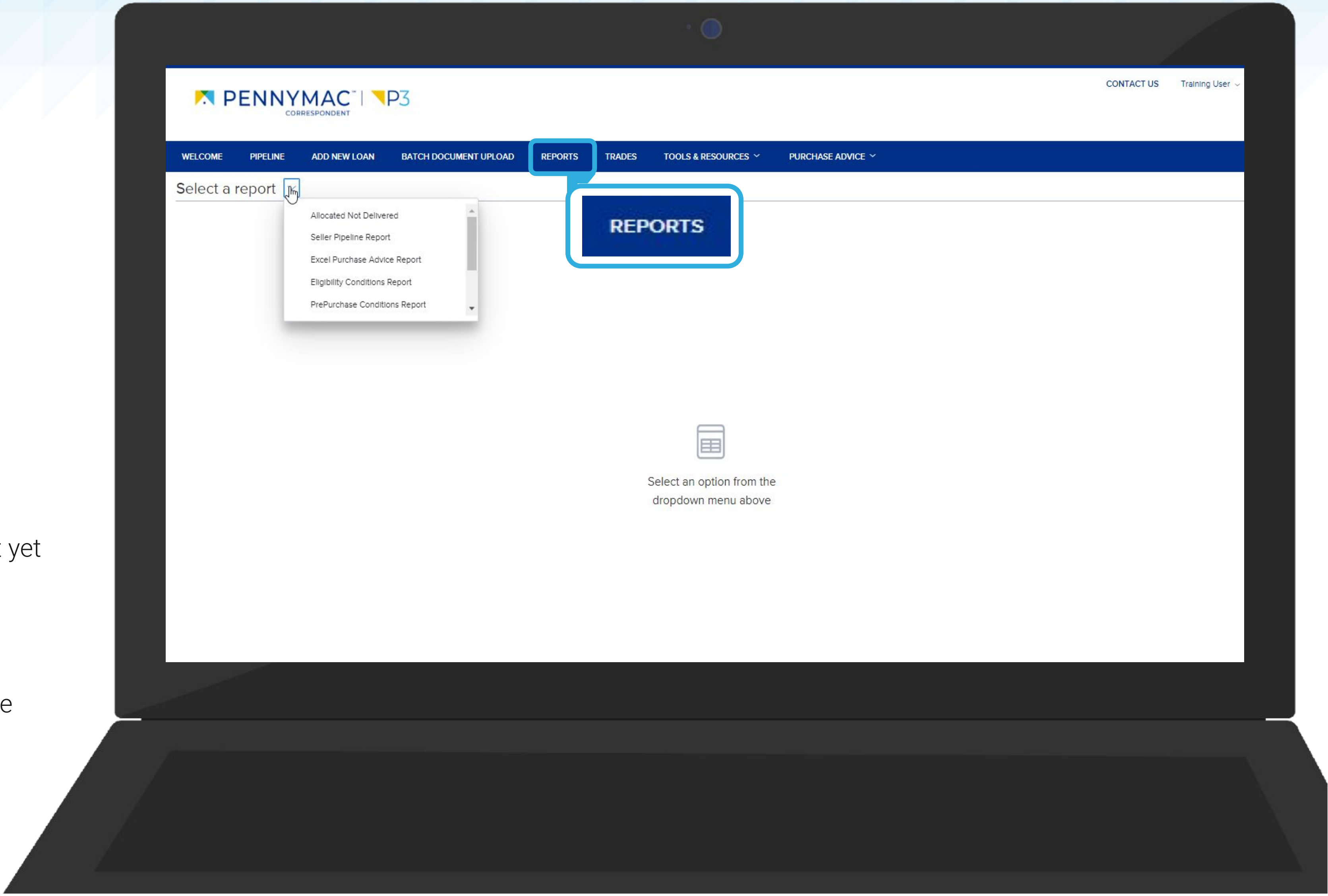
Eligibility Conditions Report
Non-delegated only report

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.

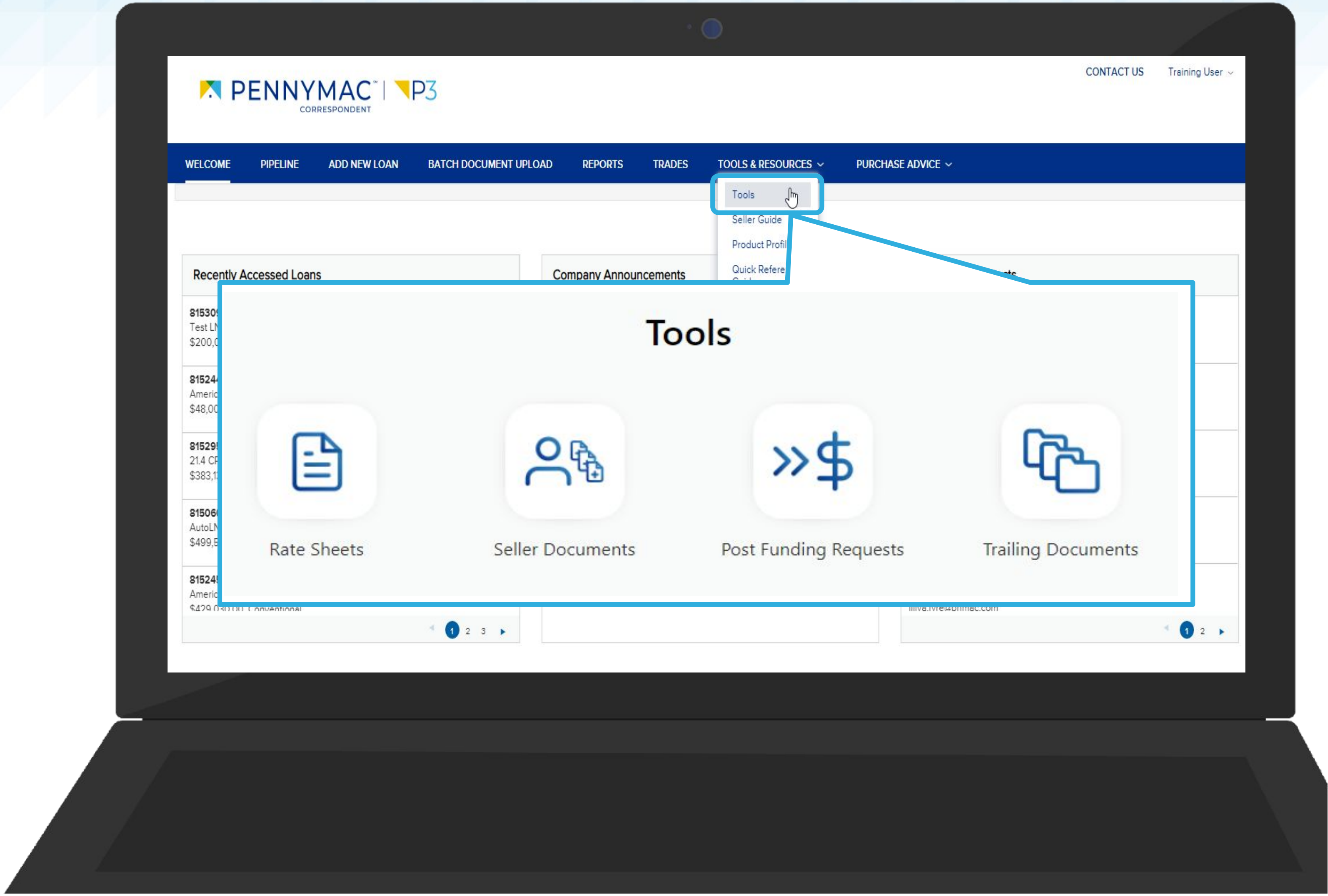


Introduction to P3

Let's take a look at P3's Toole & 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.

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Learning takeaways from this case:

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

THANK YOU!

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