PENNYMAC℠ | P3
CORRESPONDENT

Client Readiness Training

Delegated Document Submission & Reporting

Review Purchase Advice

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Review Purchase Advice

Let's review the Purchase Advice export functionality.

There are three ways purchase advice information can be exported:
1. **Single Loan PDF**: Detailed PDF of a single loans purchase advice.
2. **Bulk Loan PDF Pull**: Ability to pull multiple PDFs of a group of loans.
3. **Batch Purchase Advice Data Pull**: Ability to export **summary information** of purchase advises in a large document batch pull.

Review Purchase Advice

To pull and review a *Single Loan Purchase Advice*, follow these steps:

1 After selecting the individual loan from the pipeline, click the *Purchase Advice* section.

2 Click the linked PDF statement for the purchase advice of the loan.

3 Click the three dots on the window that opens and select the *PDF download* or *Print* option.

Review Purchase Advice

To perform a *Bulk Purchase Advice* pull, follow these steps:

1 Navigate to *Purchase Advice* and select the dropdown option.

2 Indicate the range Purchase Advices you wish to search using the following fields:
- *Start Date & End Date - This allows you to specify the date range of PAs to pull.*
- *Search - This allows you to search specific data (i.e. Name, Warehouse Bank).*
- *The Start/End Date & Search fields can be used independently or together to refine your search.*

3 Filtered results will be provided based on your search criteria.

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4 Select the Purchase Advices you wish to include in your bulk PDF pull
- Click the checkbox in the top left corner of the results window to select all PAs.
- You can also select individual loans in the search by clicking their specific boxes.

5 Select the *Download Items* button
- To download an individual loan's PA, select the Download PDF arrow on the right of the specific loan.

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6 Your download will appear in the *History Section* and will be accessible for 24 hours.

7 When your download is complete the *Progress* bar will be solid blue and the *Status* will reflect as *File completed successfully*.

8 Click the *Download Zip* button to obtain a ZIP file containing the PDFs of the Purchase Advices for the loan selected.

Review Purchase Advice

To pull the Excel Purchase Advice report, follow these steps:

1 Navigate to *Reports*.

2 Select the *Excel Purchase Advice Report*.

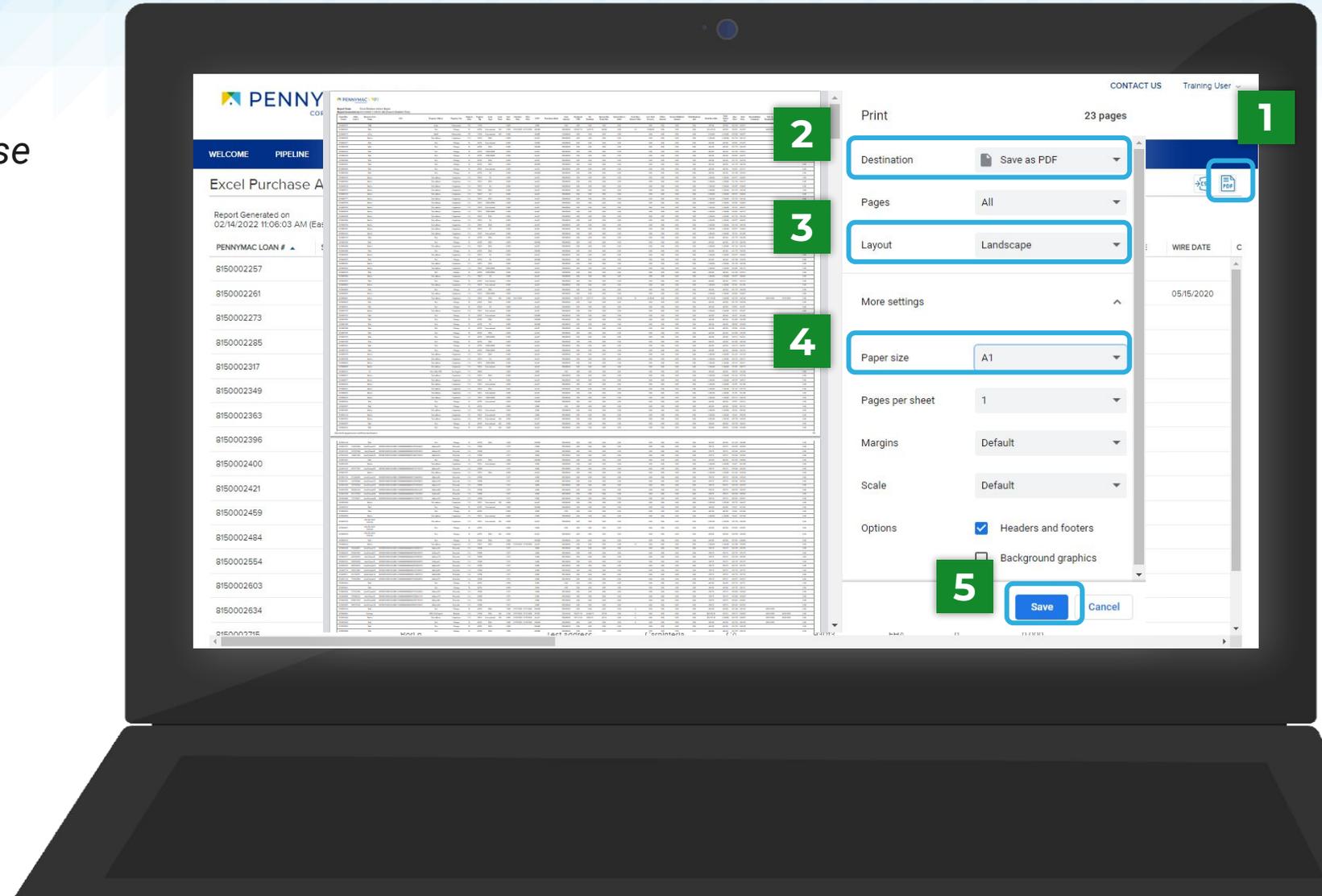**3** Click on the export *CSV* or *PDF* icon to download or print a copy.

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To save a *PDF* of the *Excel Purchase Advice* report, follow these steps:

1 Click on the *Export PDF* icon to download or print a copy.

2 Change the *Destination* to "*Save as PDF*".

3 Change the *Layout* to "*Landscape*".

4 Change *Paper size* to "*A1*".

5 Click *Save*.

THANK YOU!

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