

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 the My Profile button.

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

The screenshot shows the Pennymac Correspondent portal interface. The user's name 'TU Training User' is visible in the top right corner. A dropdown menu is open, showing options: 'My Profile', 'Account Settings', 'Contact Us', and 'Log Out'. A blue box highlights the 'My Profile' option, and a callout bubble with the number '2' points to it. Another callout bubble with the number '1' points to the user's name in the top right corner.

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

The screenshot shows the 'Manage Account' window in the Pennymac Correspondent portal. The 'Company Account' tab is selected, and the 'Company Information' section is visible. A blue box highlights the 'Company Account' tab, and a callout bubble with the number '1' points to it. Below the 'Company Information' section, the 'Company Contacts' section is visible. A blue box highlights the 'Add Contact' button, and a callout bubble with the number '2' points to it. The 'Company Information' section contains the following data:

Field	Value	Field	Value
Company DBA Name	Apple Correspondent	Originator Type	Correspondent
Company Legal Name	APPLE CORRESPONDENT	VA Originator	Yes
NMLS ID	123456789	VA ID	123456789
Manager/Admin	Manager	VA Expiration Date	
Branch DBA Name	Branch DBA Name	FHA Originator	Yes
Address	123 Test Dr		
City	Simi Valley		

The 'Company Contacts' section contains the following data:

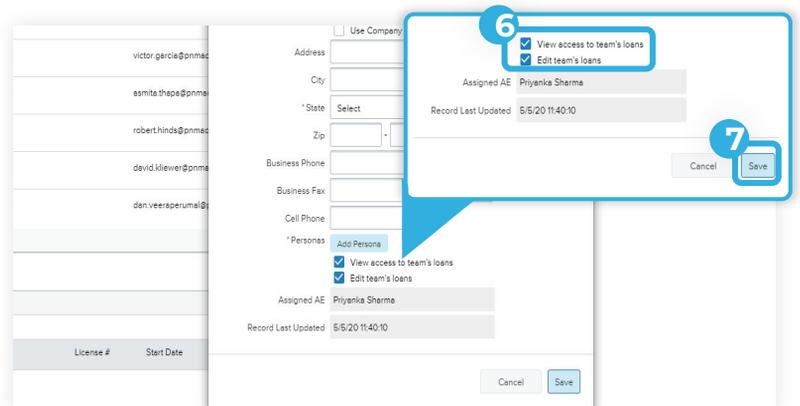
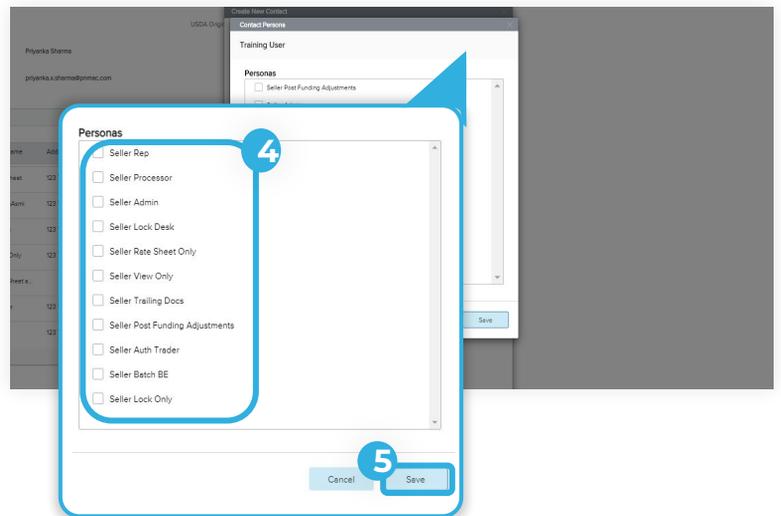
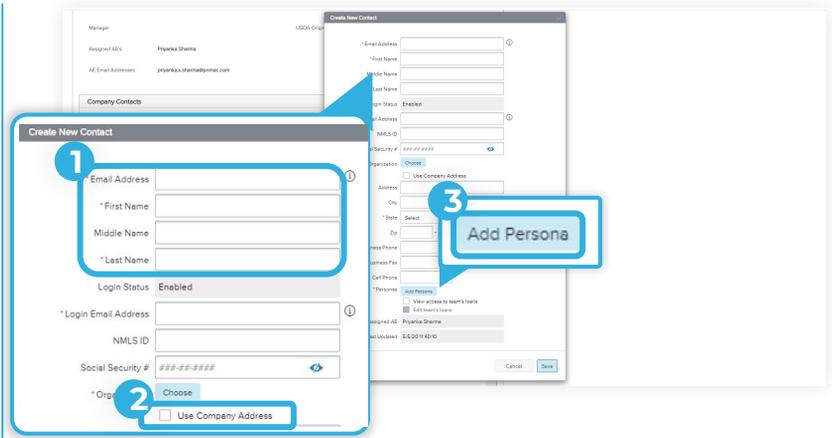
First Name	Last Name	Address	Business Phone	Email	Login Status	Person	Action
a	aa			a@a.com	Enabled	1	View
a	a			a@a.com	Enabled	1	View
a	aa			a@a.com	Disabled	1	View
Stg	UATOffshore	123 test drive		shivani.chaturvedi@pnmc...	Enabled	1	View
a	a			a@a.com	Enabled	1	View
a	aa			a@a.com	Enabled	1	View
a	aa			a@a.com	Enabled	1	View

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.

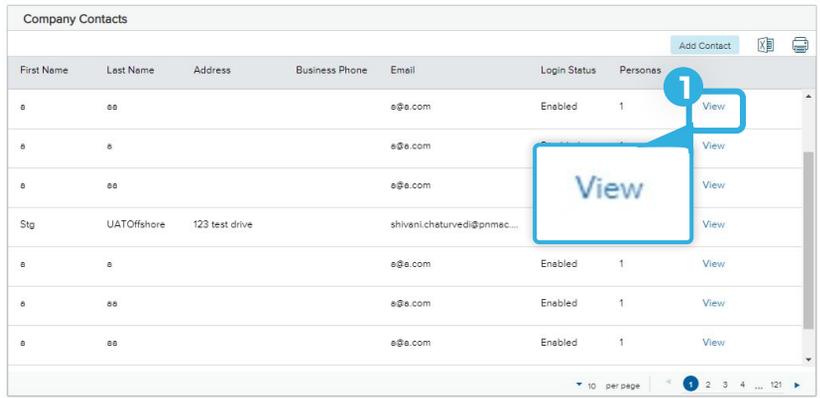
In the event you do wish to restrict a user's access to only loans created by that user and not your entire pipeline (e.g. in the case of a LO or LP), leave the boxes unchecked.



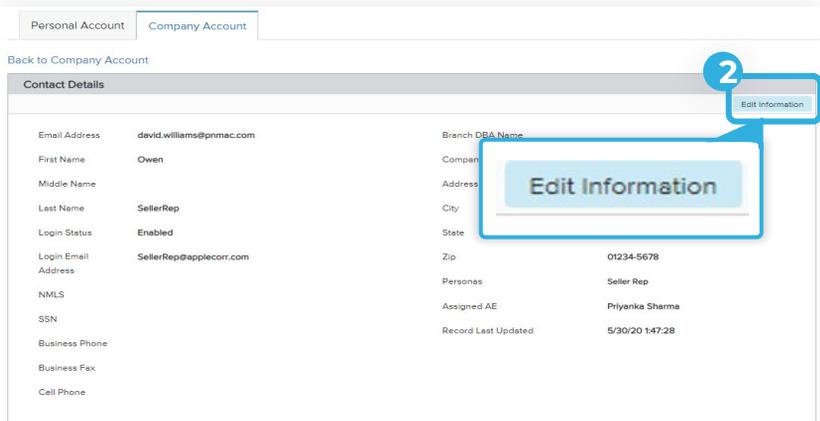
Now, let's review how to disable user access:

A Back on the Company Contacts section:

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

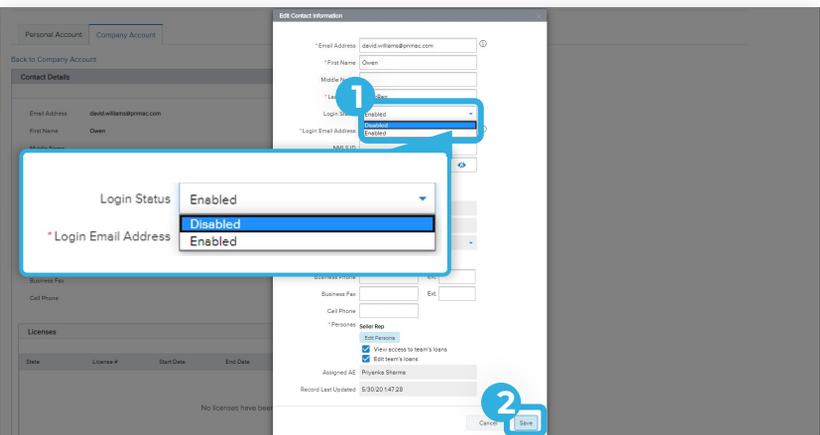


2. Click the Edit Information button.



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 completes the process.



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'.

First Name	Last Name	Address	Business Phone	Email	Login Status	Personas	View
e	ee			e@e.com	Enabled	1	View
e	e			e@e.com			View
e	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

The screenshot shows a section titled 'Notifications' with a sub-section 'Subscribed'. An 'Edit Notifications' button is highlighted with a blue callout box and the number '2'.

B Once the *Edit Notifications* window displays:

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

The screenshot shows a dialog box titled 'Edit Notifications for Seller PostFundingLockDesk'. It contains a list of notification categories with checkboxes. A 'Save' button is highlighted with a blue callout box and the number '2'. A blue callout box with the number '1' highlights the checkboxes.

Notification Category	Enabled
All Notifications	<input type="checkbox"/>
Commitment Confirmation - Assigned Auth Trader	<input type="checkbox"/>
Commitment Confirmation	<input checked="" type="checkbox"/>
Trade Position	<input checked="" type="checkbox"/>
Eligibility Review	<input type="checkbox"/>
Pending Conditions	<input type="checkbox"/>
Pending Post Purchase Conditions	<input type="checkbox"/>
Loan Purchased	<input checked="" type="checkbox"/>

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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