

Exporting Purchase Advice

JOB AID

This Job Aid walks you through how to export the single PDF Purchase Advice, bulk PDF Purchase Advice and pull the summary Excel Purchase Advice report.

A To pull a single PDF Purchase Advice, select and open the individual loan, then:

1. Click the PURCHASE ADVICE section.
2. Select the Purchase Advice link to open the PDF.

The screenshot shows the Pennymac P3 dashboard for a loan named 'Andy America'. The left sidebar has 'PURCHASE ADVICE' selected, indicated by a blue circle with the number '1'. A callout box with a blue circle containing a dollar sign and the text 'PURCHASE ADVICE' points to a button in the main content area.

B To pull a bulk PDF Purchase Advice:

1. Navigate to PURCHASE ADVICE and select the dropdown option.
2. Indicate the range of Purchase Advices you wish to search using the following fields:

- ❑ *Start Date and 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 fields and the Search field can be used independently of each other or together to refine your search.*

3. Filtered results will be provided based on your search criteria.
4. Select the Purchase Advices you wish to include in your bulk PDF pull.
5. Select Download Items.

Continued on next page.

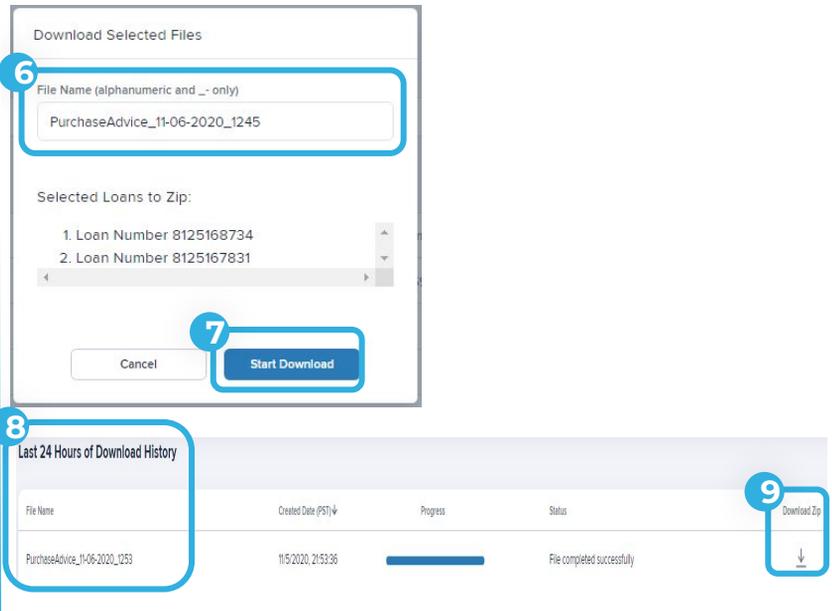
The screenshot shows the search results for purchase advice. A search bar with 'Purchase' is visible. Filter fields for 'Start Date' (11/16/2021) and 'End Date' (02/14/2022) are shown. A dropdown menu for 'PURCHASE ADVICE' is open. A table lists search results with columns for Purchase Date, Full Name, Loan Number, Warehouse Bank, Seller Loan Number, Commitment Number, Loan Status, and Download PDF. Two items are selected, indicated by blue checkmarks. A 'Download Items' button is highlighted with a blue circle and the number '5'. A 'Clear All Selected' button is also visible.

Purchase Date	Full Name	Loan Number	Warehouse Bank	Seller Loan Number	Commitment Number	Loan Status	Download PDF
02/14/2022	John Steudt	815218795		8130025506		Cleared for Purchase	↓
02/13/2022	CARLA SOLOMON	8153124855				Cleared for Purchase	↓
02/12/2022	TEST LOAN EZE DO NOT TOUCH	8153123588				Purchased	↓
02/12/2022	TEST LOAN EZE DO NOT TOUCH	8153123871				Purchased	↓

B To pull a bulk PDF Purchase Advice cont.:

6. On the pop-up screen, rename your file.
7. Click on Start Download.
8. Your download will appear in the History Section and will be accessible for 24 hours.
9. Click the Download Arrow under Download Zip to obtain a ZIP file that will contain the Purchase Advice PDFs you previously selected.

Once you have downloaded your bulk PDFs you can run addition queries using new search terms. To clear the existing search criteria, click the Clear Filters button to the right of the search fields.



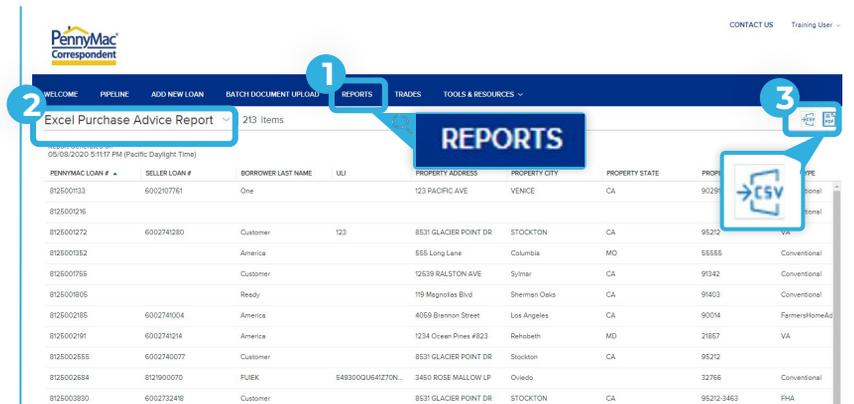
C To pull the Excel Purchase Advice report, follow the next steps:

1. Navigate to Reports
2. Select the Excel Purchase Advice Report.

Option 1

3. Click on the Export CSV icon to download copy.

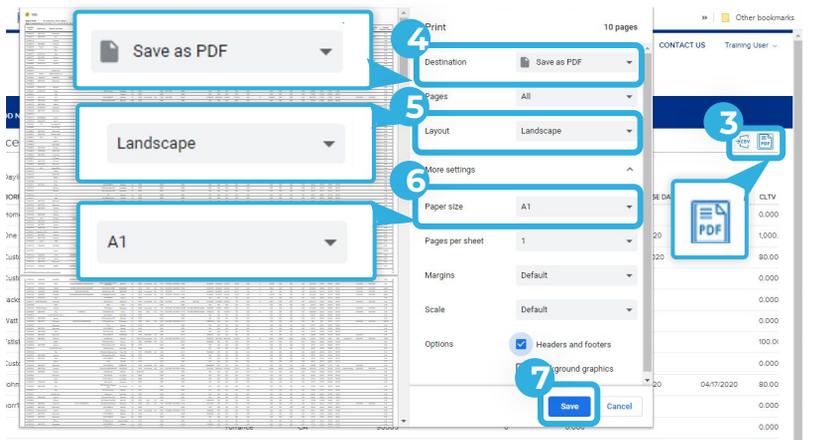
Clicking the CSV icon will automatically download the file



Option 2

3. Click on the Export PDF icon to download or print a copy.
4. Change the Destination to "Save as PDF"
5. Change the Layout to "Landscape"
6. Change Paper size to "A1"
7. Click Save

Formatting the PDF this way makes the document legible and is particularly helpful for Warehouse Clients who need an audit trail.



Equal Housing Opportunity © 2020 PennyMac Corp., 3043 Townsgate Road, Suite 300, Westlake Village, CA 91361. NMLS # 252869 (NMLS Consumer Access). Trade/service marks are the property of PennyMac Corp. and/or its subsidiaries or affiliates. Some products and programs may not be available in all states. Georgia Residential Mortgage Licensee # 33028. Illinois Department of Financial & Professional Regulation, 320 W Washington St, Springfield, IL 62786, Residential Mortgage Licensee # MB.6760811. Minnesota: This is not an offer to enter into an agreement and an offer may only be made pursuant to Minn. Stat. §47.206 (3) & (4). Licensed by the Mississippi Department of Banking and Consumer Finance. Licensed by the New Hampshire Banking Department. Licensed New York Mortgage Loan Servicer - This site is not authorized by the New York State Department of Financial Services. No mortgage solicitation activity or loan applications for properties located in the State of New York can be facilitated through this site. North Carolina Permit No. 108112. This is a secondary market business to business site and not intended for consumer use. This is not an offer for extension of credit or a commitment to lend or to purchase loans. Other restrictions may apply. Terms are subject to change without notice at the sole discretion of PennyMac Corp. All rights reserved. (05-2020)