

# Portal Web Admin

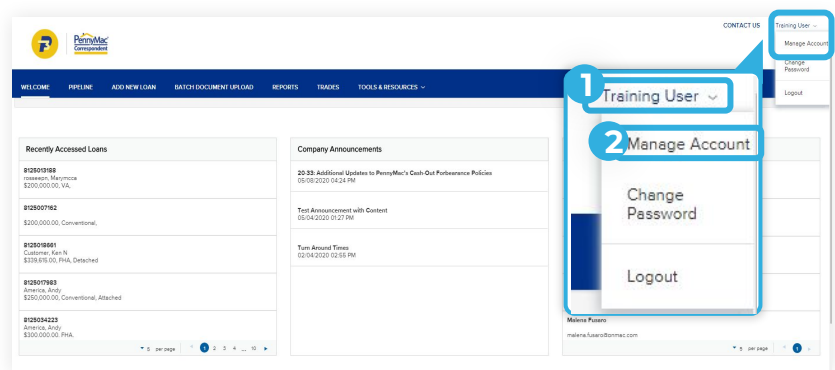
## JOB AID

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:

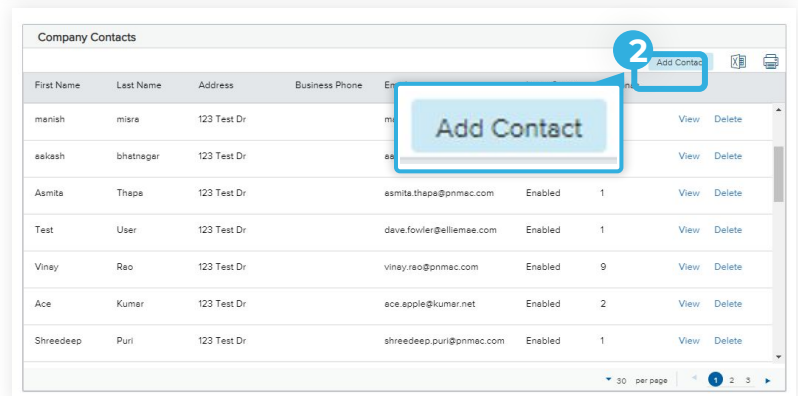
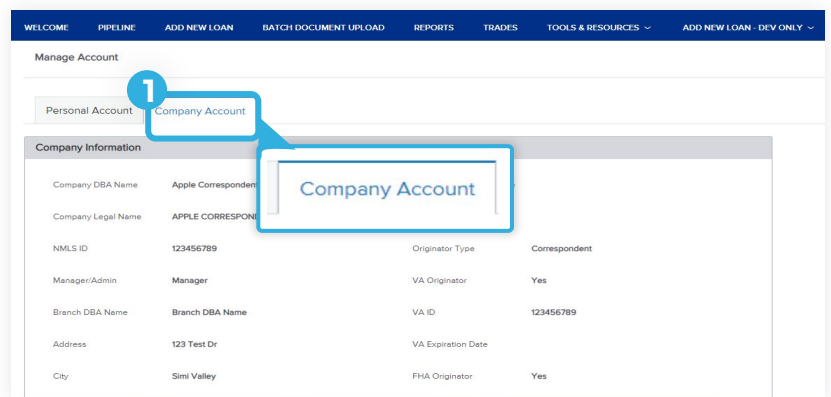
1. After logging into the portal, click on your user name in the upper right corner.
2. Once drop-down menu displays, click on Manage Account button.

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



**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



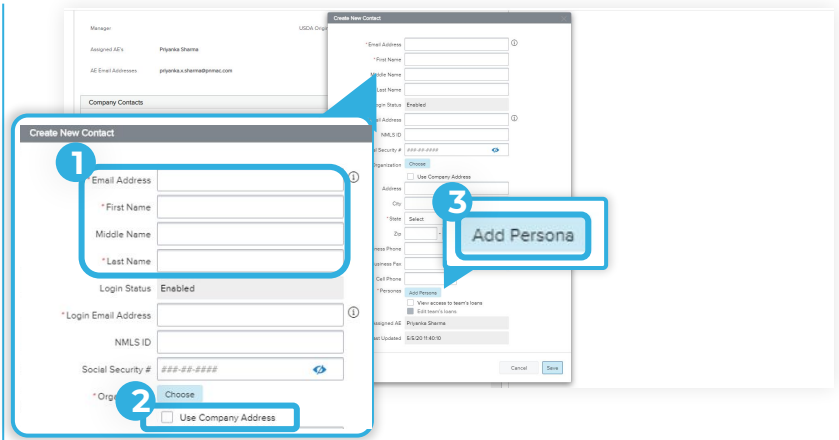
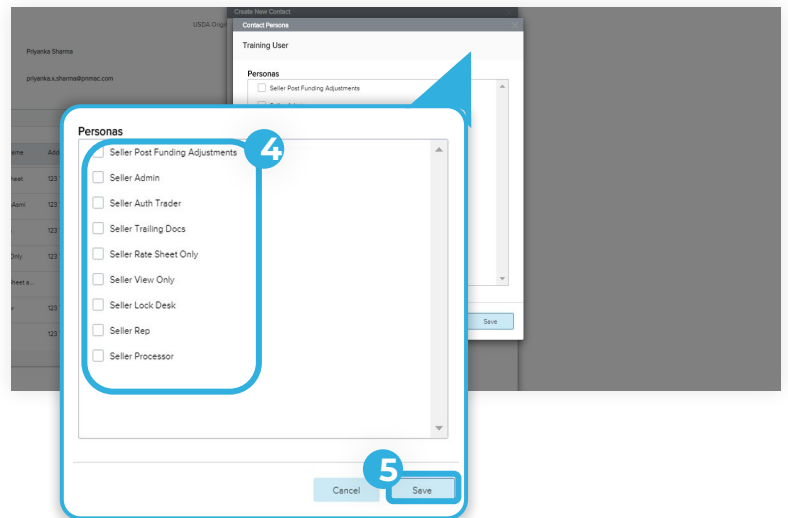
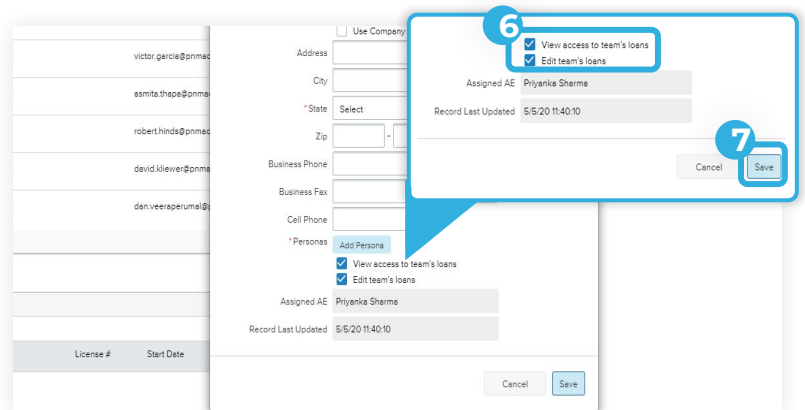
## Create New Contact window displays.

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.

*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.*

7. Click Save button.

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.

*Do not use Delete! When users are deleted, loans created by this user will no longer be accessible.*

2. Click the Edit Information button.

The screenshot shows the 'Company Contacts' section with a table of users. A blue box labeled '1' highlights the 'View' button next to the user 'Owen'. Below the table, the 'Edit Information' button is highlighted with a blue box labeled '2'.

First Name	Last Name	Address	Business Phone	Email	Login Status	Personas	View	Delete
Jimmy	Ratesheet	123 Test Dr		david.williams@pnmac.com	Enabled	1	View	Delete
Seller	AdminAsmi	123 Test Dr		esmita.thapa@pnmac.com			View	Delete
Owen	SellerRep	123 Test Dr		david.williams@pnmac.com			View	Delete
Victor	Garcia	123 Test Dr		victor.garcia@pnmac.com			View	Delete
Seller	RepRemya	123 Test Dr		bodem.remya@pnmac.com	Enabled	1	View	Delete
Seller	View Only	123 Test Dr		esmita.thapa@pnmac.com	Enabled	2	View	Delete
Bob	Rate Sheet a...			robert.hinds@pnmac.com	Enabled	2	View	Delete

Below the table, the 'Edit Information' button is highlighted with a blue box labeled '2'.

## 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.

The screenshot shows the 'Edit Contact Information' section. A blue box labeled '1' highlights the 'Login Status' dropdown menu, which is currently set to 'Enabled'. A second blue box labeled '2' highlights the 'Save' button at the bottom right of the form.

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 the 'Company Contacts' section with a table of users. A callout labeled '1' points to the 'View' button in the 'Personas' column for the first user, Jimmy Ratesheet. Below the table, there is a section for 'Notifications' with a callout labeled '2' pointing to the 'Edit Notifications' button.

First Name	Last Name	Address	Business Phone	Email	Login Status	Personas	View	Delete
Jimmy	Ratesheet	123 Test Dr		david.williams@pnmac.com	Enabled	1	View	Delete
Seller	AdminAsmi	123 Test Dr		esmita.thapa@pnmac.com			View	Delete
Owen	SellerRep	123 Test Dr		david.williams@pnmac.com			View	Delete
Victor	Garcia	123 Test Dr		victor.garcia@pnmac.com			View	Delete
Seller	RepRemya	123 Test Dr		bodem.remya@pnmac.com	Enabled	1	View	Delete
Seller	View Only	123 Test Dr		esmita.thapa@pnmac.com	Enabled	2	View	Delete
Bob	Rate Sheet a...			robert.hinds@pnmac.com	Enabled	2	View	Delete

**B** Once the *Edit Notifications* window displays:

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

The screenshot shows the 'Edit Notifications for Seller PostFunding.LockDeal' window. A callout labeled '1' points to the 'All Notifications' checkbox, which is checked. Another callout labeled '2' points to the 'Save' button at the bottom right of the window.

Notification Category	Enabled
All Notifications	<input checked="" 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

### ADMINISTRATOR

- 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 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 PROCESSOR

- View Pricing\*
- Register Loans
- View Pipeline
- Trade Management
- Reports
- Upload & Submit Docs
- Batch Document Upload
- Submit Trailing Docs
- View Purchase Advice

\*On locked/allocated loans only

### 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

### RATE SHEET VIEW ONLY

- Rate Sheet
- Receive Rate Sheet Notification

### VIEW ONLY

- View Pricing\*
- View Pipeline
- View Trades
- View Documents / Conditions
- View Reports
- View Purchase Advice

\*On locked/allocated loans only

### TRAILING DOCUMENTS

- 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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