

Client Readiness Training

Delegated Loan Processing





Follow the next steps to register a delegated loan:



After logging into P3, click on the **Add New Loan** tab

Recently Accessed Loans		Company Anr	nouncements		Lender Key Contacts	
8152982866 , Sharat \$0.00, ,					Lock Desk - Swapna Nadkarni - Primary 111-111-1111 swapna.nadkarni@pnmac.com	
8151956001					Client Operations	
America, Andy \$0.00, Conventional,				No data.	sunitha.jampana@pnmac.com	
8152938154 123ewq, 1qwwwe \$0.00, ,					PrePurchase Manager	
8150848752 875, Torrance & 13 295, \$499,479.00, ,					Robert Springer robert.springer@elliemae.com	
8153064404 America Jr, Andy Tommy \$0.00 Conventional					temp_ClientOpr Frye	
	< 1 2 ▶					1 2 🕨
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Privacy Policy Statement						



2

Once in the Add New Loan screen there are 2 options to complete the information:

а

Option a: Click Browse button or use the Drag and Drop option to upload Fannie Mae 3.2 (FNM) files. P3 extracts the information and populates the required fields.

WELCOME	PIPELINE	ADD NEW LOAN	BATCH DOCUMENT UPLOAD	REPORTS	TRADES	TOOLS & RESOURCES ~	PURCHASE ADVICE \sim		
			Add New Loan						
			Import Loan Data					a	
					6				
					Drop file Supports fine	es or browse 1, txt and xml files.			
			Loan Data						
			BORROWER INFORMATION						
Privacy Policy St	atement								





<u>Option b</u>: complete the required fields manually:

- First Name
- Last Name
- Social Security Number
- Address
- Postal Code
- City
- State
- County
- Seller Loan Number



The postal code automatically looks up the city, state and county. If it is associated with more than one city, it gives multiple options to select.

M PE		MAC [®] \P	3	CONTACT US Training User ~
WELCOME	PIPELINE	ADD NEW LOAN	BATCH DOCUMENT UPLOAD REPORTS TRADES TOOLS & RESOURCES V PURCHASE ADVICE V	
		b	Loan Data BORROWER INFORMATION First Name ' Middle Last' Suffix Social Security Number	
			City* State* County* I I I I	
			LOAN INFORMATION	
			Seller ID Seller Name Seller Loan Number 700123 APPLE CORRESPONDENTS	
			Underwitting Method Type File Type Universal Loan Identifier Delegated	



- **3** To submit the loan. There are two options of doing this:
 - a <u>Option a</u>: Click the **Submit and Price** button to save the loan and be directed to the pricing section.
 - **b** Option b: Click **Submit & Add Another Loan** button to submit the loan, save it to the pipeline and repeat the step in order to add another loan.

With **option b**, a green message notifies that the loan was successfully saved.

Loan 8125001967 saved successfully Click here to Price the Loan

		Address				
		City *	State *	Count	y*	
		LOAN INFORMATION	Seller Name	Seller	Loan Number	
		700123 Underwriting Method Type Delegated	APPLE CORRESF	PONDENTS	rsal Loan Identifier	
	а	Submit & Price	bmit & Add Another Loan	b		
Privacy Policy Statement						



Complete Loan Package

Selecting Option a, the Product Pricing & Lock screen displays.

(i)

An alternative way to get to this screen is searching the created loan in the **File Started** tile in the pipeline, go into the loan, and click the **Product Pricing & Lock** tab.

WELCOME PIPELINE	ADD NEW LOAN	BATCH DOCUMENT UPL	DAD REF	PORTS TRADES	TOOLS & RESOURCES 741258963	· → PURCHAS	E ADVICE ~	8153112056		
123 Test Loan Drive, Tampa, FL, 3362 APPLE CORRESPONDENTS	8			Seller Id	700123					
E LOAN SUMMARY						LOCK DESK OPE	N			
	Prie	cing and Lock								
	L	.ock Data	Pricing Summary		Expand All					
	L	LOAN REFERENCE PROF								~
	s	Seller Loan Number		Universal Loan Identifi	er	Borrower Count*		MORTGAGE DETAILS		~
		741258963					+ -	LTV		~
LOAN ACTIONS	в	Borrower First Name*		Middle	La	ist*	Suffix	BASE LTV	TOTAL LTV	
Submit for Review		Test				Loan		LTV -	LTV	
Withdraw Loan	Р	PROPERTY DETAILS						HCLTV	HCLTV -	
Get MI Quote	A	Address* Postal Code* LOCK DETAILS								
		123 Test Loan Drive				3	Commitment Type	Batch ID		
	c	City*	County*				Best Efforts	-		
		Tampa ×	✓ FL	~	Hillsborough		× ~	Requested By	Rate Sheet Date &	& Time
	P	Property Type*		Occupancy Type*		Number of Units				
		Select	~	Select	\sim	1	+ -	Extension Days	Lock Date & Time	



THANK YOU!

