Reviewing Legacy Pipeline Reports

JOB AID

This Job Aid will help you navigate and export the Legacy Pipeline Reports.

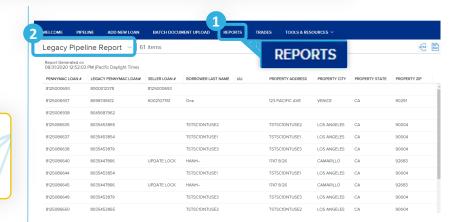
ATTENTION!

The **Reports** function can only be accessed by the following user roles: **Seller Rep**, **Seller Processor**, **Seller Lock Desk**, and **View Only**.

- A To review the Legacy Pipeline Report report, follow the next steps:
 - 1. Navigate to Reports
 - 2. Select the Legacy Pipeline Report.

TIP

The **Legacy PennyMac Loan #** matches the loan number from the old portal, whereas the **PennyMac Loan #** is associated with the migrated loan in P3.



B To pull the Excel Legacy Pipeline report, follow the next steps:

Option 1

 Click on the Export CSV icon to download copy.

Clicking the CSV icon will automatically download the file

Option 2

- Click on the Export PDF icon to download or print a copy.
- Click Print

