

TPO PORTAL NOTIFICATION SETUP FORM

Merchants' TPO Portal offers a robust notification framework to keep your team informed about key events and triggers throughout the loan lifecycle. The Notification List below provides a comprehensive list of available notifications, their descriptions, and the applicable channel(s) (Non-Delegated Only or All Channels – Non-Delegated and Delegated). Please complete the setup list on the next page by specifying users in your organization who should receive notifications.

NOTIFICATION LIST		
NOTIFICATION NAME	NOTIFICATION EVENT	CHANNEL
Incomplete Credit Package	Submitted credit package is missing critical documents; conditions for missing documents have been added in the Portal.	Non-delegated Only
Loan Submitted to Underwriting	Loan has been submitted to underwriting for review.	Non-delegated Only
Underwriting Decision	Approved With Conditions, Clear to Close, Declined, Suspended, and Withdrawn.	Non-delegated Only
Lock Expiration Notice: 3 days	Lock is expiring in 3 days.	All channels
Lock Expiration Notice: Today	Lock is expiring today.	All channels
Incomplete Closing Package	Submitted closing package is missing critical documents; conditions for missing documents have been added in the Portal.	All channels
Pre-Purchase Suspended	Initial pre-purchase review is complete and conditions have been added in the Portal.	All channels
Post-Purchase Suspended	Additional issues with the loan discovered after purchase; post-purchase conditions have been added in the Portal.	All channels
Loan Purchased	Loan has been purchased and purchase advice is available in the Portal.	All channels
Declined for Purchase	Loan was declined for purchase due to issues discovered in the pre-purchase review.	All channels
Loan Cancelled Notice	Loan was cancelled by seller.	All channels
Announcements	New TPO Announcement posted to the TPO Resource Center.	All channels

Company Name: _____

Primary Contact Name: _____

Title: _____

CONTACT INFORMATION				NOTIFICATION SETUP													
FIRST & LAST NAME	EMAIL ADDRESS	PHONE NUMBER	CONTACT	NON-DEL ONLY			ALL CHANNELS										
				INCOMPLETE CREDIT PACKAGE	LOAN SUBMITTED TO UNDERWRITING	UNDERWRITING DECISION	LOCK EXPIRATION NOTICE: 3 DAYS	LOCK EXPIRATION NOTICE: TODAY	INCOMPLETE CLOSING PACKAGE	PRE-PURCHASE SUSPENDED	POST-PURCHASE SUSPENDED	LOAN PURCHASED	DECLINED FOR PURCHASE	LOAN CANCELLED NOTICE	ANNOUNCEMENTS		
			*Portal Admin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			*Pay Histories	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			*Final Docs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			*Post Closing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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*Required Contacts