Enhanced TPO Portal

Button has recently transitioned to the Enhanced Condition, offering an easy-to-use and user-friendly experience, along with several new features.

Accessing the Enhanced Condition is the same as the standard condition. To view it, go to the TPO portal, open a loan file, and navigate to the Condition section.

It will reflect the total number of Conditions, number of open conditions (not cleared), number of satisfied conditions (cleared).

- The TPO user should review the conditions that require action. The status of these conditions should be sorted based on "Added".

Status type and their meaning
- ➢ Added - Action is pending from Client
- ➢ Fulfilled - Document is uploaded and Ready for review is clicked.
- ➢ Rejected - Button team has rejected the uploaded document
- ➢ Received - Button team acknowledges that they have received the document however review is pending (Decision is pending (if it should be cleared or not)
- ➢ Reviewed - Button team acknowledges that they have reviewed the document however decision is pending (if it should be cleared or not)
- ➢ Requested - Document is requested by the Button team. Clients need to take action on it.

➢ Re-requested - Document is re-requested by the Button team. Clients need to take action on it.
➢ Waived - Condition is not needed now (not applicable)
➢ Cleared - Condition is satisfied.

Conditions (145)

Filter By Prior To

☐ Closing 0/2 Satisfied	☐ Cond. Approval 0/2 Satisfied	☐ Docs 0/141 Satisfied

OPEN | 145   SATISFIED | 0   ALL | 145

Condition Type ∨   All Conditions

	PUBLISHED	STATUS	CATEGORY	PRIOR TO	TYPE	NAME
▸	03/17/2026	Added	Income	Docs	Underwriting	1099 Statements
▸	03/17/2026	Added	Processing	Docs	Processing	4506-T
▸	03/17/2026	Added	Assets	Docs	Underwriting	Access to Funds
▸	03/17/2026	Added	Income	Docs	Underwriting	Alimony/Child Support

Condition Type ∨   All Conditions

	PUBLISHED	STATUS 🔍 ⇕	CATEGORY	PRIOR TO	TYPE	NAME ▲
▸	03/17/20		Income	Docs	Underwriting	1099 Statements
▸	03/17/20	☐ Added	Processing	Docs	Processing	4506-T
▸	03/17/2026	Added	Assets	Docs	Underwriting	Access to Funds

- To upload a document to fulfill a condition, click the arrow icon shown in the screenshot below.

➢ You have the option to expand all the conditions by clicking on the top arrow highlighted below.

➢ You will have the option to upload a document. To do so, click on **Browse - Local drive**, as illustrated below. You can upload the required document. Please follow this for available open status - Added, Requested and Re-requested conditions.

- For each required condition, upload the corresponding document and then click "Ready For Review."
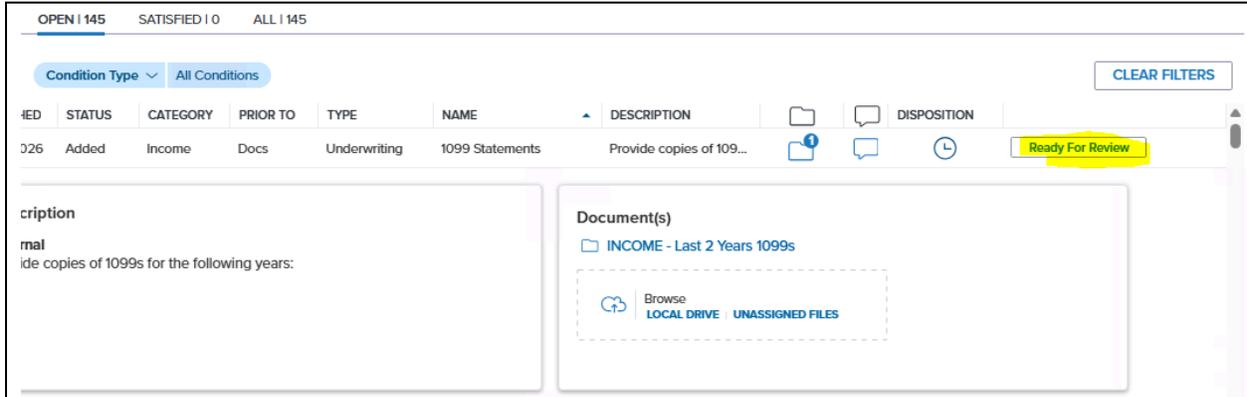
Once the document is uploaded and "Ready for review" is clicked then Status of condition will be changed to "Fulfilled".
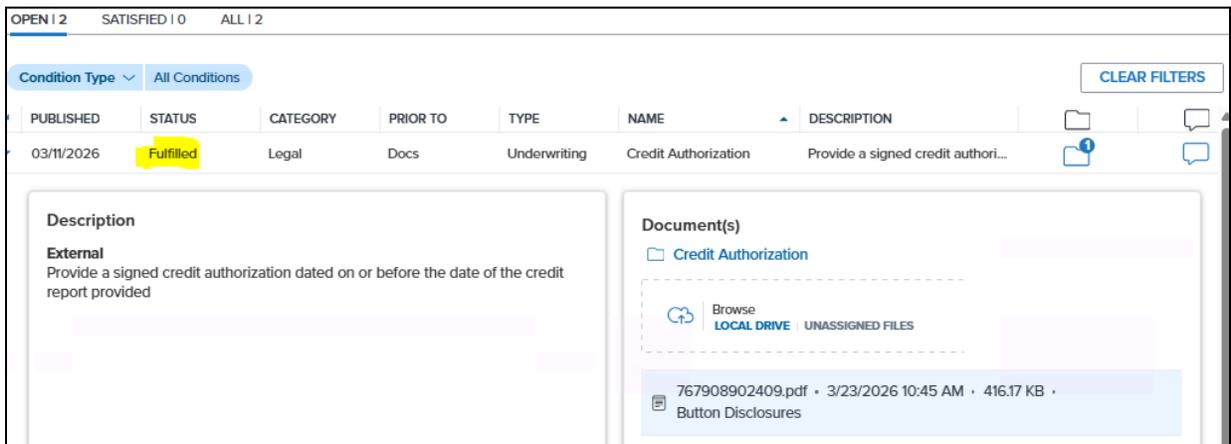
After a condition is submitted for review, it will update from "Ready for Review" to "Re-open." You can click on Re-open and upload new documents if you missed in the first attempt but make sure to click Ready For Review again.
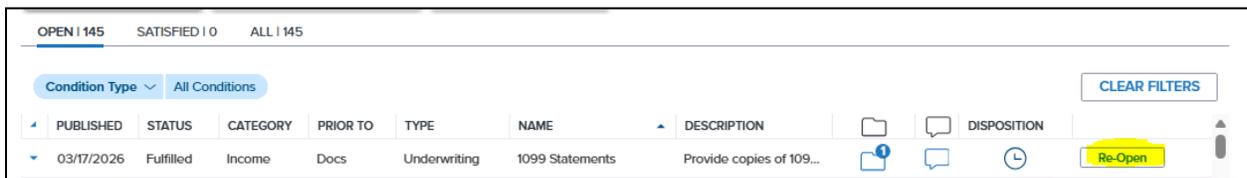
- Please select "Notify Lender" once all open conditions are satisfied (documents are uploaded and "ready for review" is clicked). Make sure there is no open condition.

Users will get the alert that "Lender was notified"

- The filters can be cleared by clicking on the highlighted option

Additional feature:

- Adding Comment: If TPO user wants to add a comment then click on highlighted box.
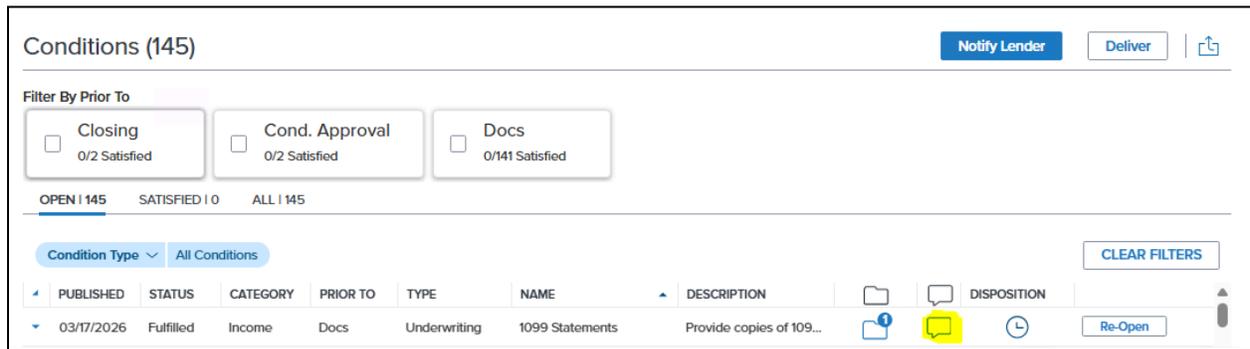
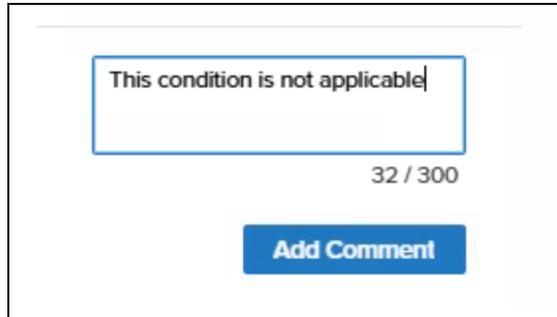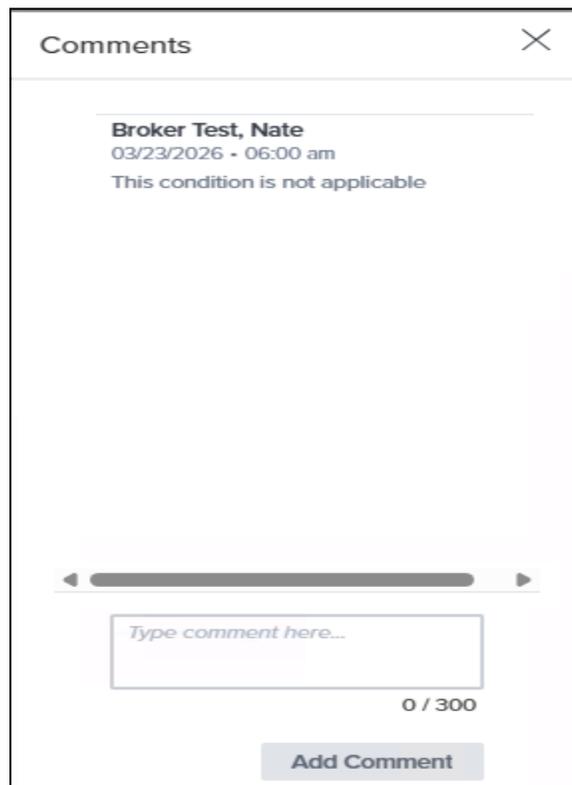It will open a box to add comments. Users can add comments in the box. Once comment is added in box then click on "Add Comment"
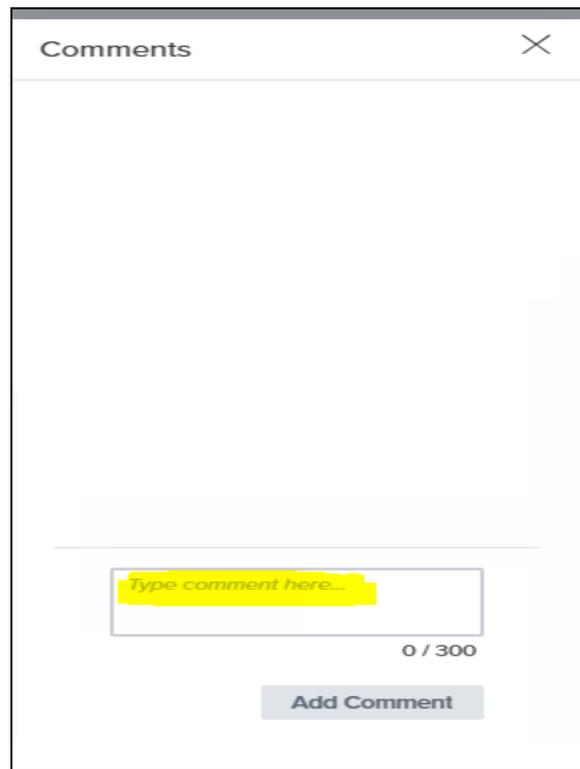
Once the comment is added then TPO user will be able to see the comment.

If Button will add a comment then TPO User can view the comment under the same option.

- Users can export the condition in Excel.

- Default views are available based on "Status" and "Prior To,"

➢ TPO users can click on the highlighted options to view conditions based on their status: "Open" or "Satisfied." Selecting "All" will display every condition, regardless of status (both Open and Satisfied conditions). It will eliminate the applying filter in Status (Added or Satisfied).

Open will include all conditions which are not satisfied (not cleared). It will include fulfilled conditions as well.

➢ Users can filter the condition based on "Prior To". It will eliminate the applying filter in the Filter option.

➢ TPO users have several options to filter and sort conditions according to their needs. These options include: Published, Status, Category, Prior To, Type, Name, Description, and Disposition.

● Meaning/Purpose of each option:
➢ Published - Date on which condition is added
➢ Status - Status of condition as per the action taken like Added, Fulfilled, Waived, Cleared, Rejected, Requested etc
➢ Category - Its category of condition based on documentation like Assets, Credit, Income, Property etc
➢ Prior To - It specifies the stage by which a condition must be cleared. For instance, if set to "Prior to Approval," the condition must be cleared before the approval is issued.
➢ Type - This indicates the team responsible for reviewing and clearing the condition.
➢ Name - Name of Condition
➢ Description - Description of Condition (what is needed).
➢ Disposition - If the condition is open or Satisfied. This will be changed to Satisfied once the Button team will clear the condition.