Sharing Events in the Closing Portal

About:

With the Closing Portal, you can now let Client Users know the status of various Events you have created for the file they are tied to.
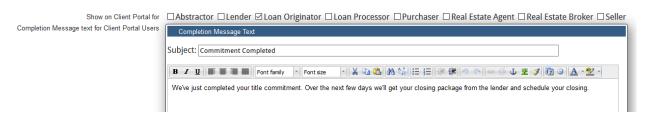
Setting up the event

If you aren't currently using the Events and Checklists, you will need to set those up before utilizing this feature.

If you are utilizing the Events and Checklists, and have always wished that there was some way to alert the Borrower that a task has been completed, your wish has been granted!

To get started, from your Whiteboard go to Back Office -> Events Menu ->Manage Events List.

Click on the Event you wish to edit, in this example, we will work on the Prepare Commitment task.

You will see a new field called "Show on Client Portal for" with several options. If you select, say, the Purchaser (and you can select as many as you would like), a new field will pop open called "Completion Message text for Client Portal Users":

Here, we have some boilerplate verbiage, which you can edit, if you wish. This is the message that the Purchaser will receive through the Closing Portal when you complete the event in your file. If you wish for the client to see the status of an event but not receive notification you can leave the Message text blank.

To save your changes, click Update Event List on the bottom.

Events in the Portal

When a Closing Portal user is logged in, they will see on the Details page, Open Events and Completed Events:

The date of the Open Events, is the due date that was set by your checklist or manually set in your file. Once we check the event off as completed in the file, you will be able to make changes to the stock message you have, if you want to personalize it. Once you are all set, click SEND. The Client User will now see that the event has been completed:

The Client User will see that the event "Prepare Commitment" has been completed and will receive a message regarding what to expect next.

Now, your Client Users will know where you are at with their file at any given time!