

# How to Submit a Loan

PROCEED TO THE HOMEPAGE

1. <http://www.bluepointmtg.com/>
2. Click Broker Log In

bluepoint  
MORTGAGE

[HOME](#) [ABOUT](#) [GET APPROVED](#) [PRODUCT INFORMATION](#) [FORMS & RESOURCES](#) [CONTACT US](#)



949-771-0000

BROKER LOG IN

SEND ME RATE SHEETS

in

FINALLY, PIPELINE MANAGEMENT FROM YOUR  
MOBILE DEVICE

WELCOME TO

bluepoint  
MORTGAGE

PROCEED TO THE BROKER PORTAL

3. Log in – Proceed to Broker Portal
4. Click – Create New Loan
  - a. Click – Import Loan File



Welcome,

[ Log Off

Portal Mode: Broker ▼

Loans Conditions Tasks

Search Display most recent 25 ▼ loans assigned to anyone ▼

Loan Number	Conditions	Tasks	Last Name	First Name	Loan Amount	Loan Status	Status Date	Lock Status	Lock Exp Date	Loan Officer	Processor
-------------	------------	-------	-----------	------------	-------------	-------------	-------------	-------------	---------------	--------------	-----------

Broker Pipelines

- Loans
- Tasks
- Conditions

QuickPricer

Create New Loan

- Import loan file
- Create purchase loan
- Create refinance loan

Broker Resources

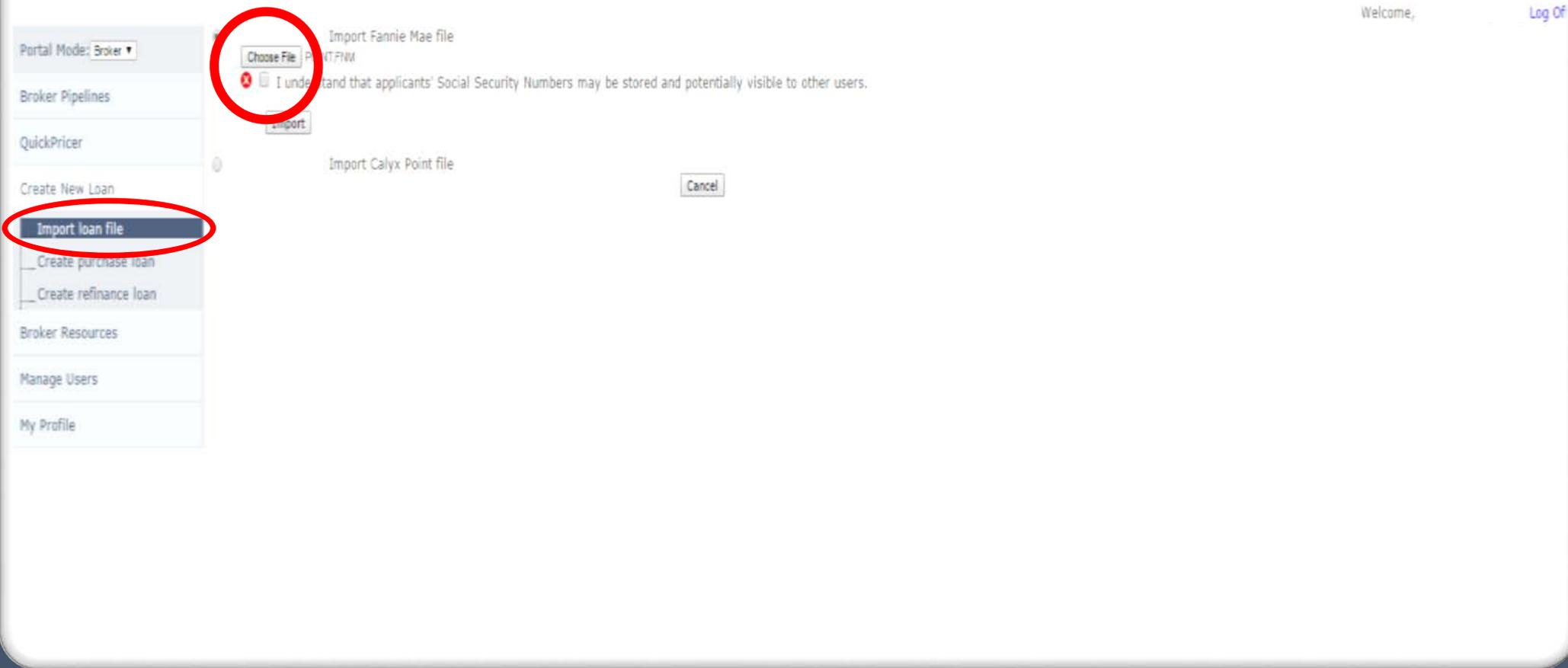
Manage Users

My Profile

5. Click – Choose File
  - a. Upload 3.2 Point File
  - b. Check of “I understand” then click - IMPORT



Welcome, [Log Of](#)



# APPLICATION #1

- c. Click - Application # 1
  - i. Verify all information is correct | Update anything missing or incorrect.
  - ii. Assign Processor if need be and update Pricing Information.
  - iii. Re-Issue Credit: Select Provider -> Log- In -> Import

The screenshot shows a mortgage application management interface. At the top, the 'Loan Officer' and 'Processor' fields are both set to '(re-assign)' and are circled in red. Below this is a table with columns for Loan Number, Loan Status (Loan Open), Name, Phone Number, Email Address, and Lowest Middle Credit Score (0). The interface includes several sections: 'Run Scenario in DO', 'Run Scenario in DU', and 'Send to LP' buttons; a 'Results Filter' section with checkboxes for Term (10yr, 15yr, 20yr, 25yr, 30yr, Other), Amortization Type (Fixed, 7yr ARM, 3yr ARM, 5yr ARM, 10yr ARM, Other), and Product Type (Conventional, My Community / HomeReady, Home Possible, FHA, VA, USDA); an 'Alert Messages' section with a red warning: 'Credit has not been ordered for Application #1. Please order credit for more accurate results.'; an 'Applicant Info' section with fields for First Name, Middle Name, Last Name, Suffix, SSN, E-mail, and Citizenship (US Citizen); and a 'Please select an option' section with input fields for Total Payment, Liquid Assets, and Negative Cash Flow from Other Properties. A modal window titled 'Please select an option' is open, showing radio button options for 'Order New Credit Report', 'Re-Issue Credit Report' (selected), 'Upgrade Existing Credit Report to Tri-Merge Report', and 'Manually Enter Credit Report'. Below these options is the 'Credit Provider Information' section, where the 'Credit Provider' field is set to 'Is my credit provider supported?' and is circled in red. A dropdown menu below it shows '<< Select Credit Provider -->'. At the bottom of the modal are buttons for 'Re-Issue Credit' and 'Revise Property & Loan Info'. A red arrow points from the 'Re-Issue Credit' button in the modal to the 'Please select an option' section on the main page.

## PROPERTY & LOAN INFO

6. Click – Property & Loan Info
  - a. Verify all information is correct | Update anything missing or incorrect.
  - b. Ensure Lock is 15/30 days and select yes for Fee Buy Out if needed.
  - c. Click - PRICE when Done.

Loan Officer: (re-assign) Processor: (re-assign) [Message To Lender](#) [Go back to Loan Pipeline](#)

Loan Number	Loan Status	Name	Phone Number	Email Address	Lowest Middle Credit Score
901	Loan Open				<a href="#">(explain)</a>

Run Scenario in DO | Run Scenario in DU | Send to LP

No Pinned Results to Compare

Horizon of borrower interest: 60 months [\(explain\)](#)

Application #1 **Property & Loan Info**

**Property Information**

Street Address: \_\_\_\_\_  
Zip Code: \_\_\_\_\_ State: CA  
County: \_\_\_\_\_  
City: \_\_\_\_\_

In Rural Area?  Yes [explain](#)  
Property Use: Primary Residence  
Has Non-Occupant Co-Borrower?  Yes  
Property Type: SFR  
Structure Type: Detached  
Additional Monthly Housing Expenses: \$160.94 [calculate](#)  
Owner's Title Insurance:  Use estimated title cost.  Use cost quoted by borrower/realtor.

**Loan Information**

Impound?  Yes Interest Only?  Yes  
Doc Type: Full Document  
Appraised Value: \_\_\_\_\_  
Sales Price: \_\_\_\_\_  
Down Payment: 3.500% \$3,728.00  
1st Lien: 96.499% \$102,772.00  
2nd Financing?  No  Yes  
Rate Lock Period: 30 days  
Rate Lock Expiration Date: \_\_\_\_\_

**Results Filter**

**Term**  
 10yr  25yr  30yr  Other

**Amortization Type**  
 Fixed  7yr ARM  3yr ARM  10yr ARM  5yr ARM  Other

**Product Type**  
 Conventional  FHA  My Community / HomeReady  VA  Home Possible  USDA

Price

Number of Programs: 4

**Other Information**

Loan Originator is  Lender  Borrower  
Lender Fee Buyout Requested?  Yes  
Expected AUS Response: DU Approve/Eligible  
Number of Financed Properties: 1 [explain](#)  
Prior Sales Date: mm/dd/yyyy [explain](#)  
Conv Loan PMI Type: No MI  
Is UFMIP/FF Financed?  Yes Override Auto-Calculated UFMIP/FF?  Yes  
VA UFMIP: 1.750% VA Funding Fee: 0.000%  
USDA Rural Guarantee Fee: 1.000%

Price

PRICING RESULTS

- 7. Click – Register next to preferred Rate
  - a. Loan is ready for uploading submission items

### Results Filter

<p><b>Term</b></p> <p><input type="checkbox"/> 10yr    <input type="checkbox"/> 25yr</p> <p><input type="checkbox"/> 15yr    <input checked="" type="checkbox"/> 30yr</p> <p><input type="checkbox"/> 20yr    <input type="checkbox"/> Other</p>	<p><b>Amortization Type</b></p> <p><input checked="" type="checkbox"/> Fixed    <input type="checkbox"/> 7yr ARM</p> <p><input type="checkbox"/> 3yr ARM    <input type="checkbox"/> 10yr ARM</p> <p><input type="checkbox"/> 5yr ARM    <input type="checkbox"/> Other</p>	<p><b>Product Type</b></p> <p><input type="checkbox"/> Conventional    <input checked="" type="checkbox"/> FHA</p> <p><input type="checkbox"/> My Community / HomeReady    <input type="checkbox"/> VA</p> <p><input type="checkbox"/> Home Possible    <input type="checkbox"/> USDA</p>
--	---	---

Price

Number of Programs: 4

---

### Results

Rates shown in red are expired.

\* - The costs displayed are the borrower's non-financed settlement charges.  
\*\* - exceeds Max DTI

Eligible Loan Programs			RATE	POINT	PAYMENT	DTI	APR	QM	CLOSING COSTS	RESERVE MONTHS	
<b>30 YR FIXED FHA</b>											
<a href="#">pin</a>	<a href="#">register</a>	<a href="#">request lock</a>	4.750	-0.386	545.49	45.089	5.785	⊗	\$414.43	4.6	<a href="#">BluePoint 30 Yr FHA Standard</a>
<a href="#">pin</a>	<a href="#">register</a>	<a href="#">request lock</a>	4.625	-0.662	537.64	44.807	5.658	⊗	\$403.54	4.7	<a href="#">BluePoint 30 Yr FHA Standard</a>
<a href="#">pin</a>	<a href="#">register</a>	<a href="#">request lock</a>	4.500	-0.377	529.84	44.527	5.530	⊗	\$392.65	4.8	<a href="#">BluePoint 30 Yr FHA Standard</a>
<a href="#">pin</a>	<a href="#">register</a>	<a href="#">request lock</a>	4.375	-0.131	522.10	44.249	5.403	⊗	\$381.75	4.8	<a href="#">BluePoint 30 Yr FHA Standard</a>
<a href="#">pin</a>	<a href="#">register</a>	<a href="#">request lock</a>	4.250	0.179	514.42	43.974	5.276	⊗	\$370.86	4.9	<a href="#">BluePoint 30 Yr FHA Standard</a>
<a href="#">pin</a>	<a href="#">register</a>	<a href="#">request lock</a>	4.125	0.957	506.80	43.701	5.148	⊗	\$359.97	4.9	<a href="#">BluePoint 30 Yr FHA Standard</a>
<a href="#">pin</a>	<a href="#">register</a>	<a href="#">request lock</a>	4.000	1.181	499.23	43.429	5.021	⊗	\$349.08	5.0	<a href="#">BluePoint 30 Yr FHA Standard</a>
<a href="#">pin</a>	<a href="#">register</a>	<a href="#">request lock</a>	3.875	1.575	491.73	43.160	4.894	⊗	\$338.18	5.1	<a href="#">BluePoint 30 Yr FHA Standard</a>
<a href="#">pin</a>	<a href="#">register</a>	<a href="#">request lock</a>	3.750	2.026	484.28	42.892	4.767	⊙	\$327.29	5.2	<a href="#">BluePoint 30 Yr FHA Standard</a>
<a href="#">pin</a>	<a href="#">register</a>	<a href="#">request lock</a>	3.625	3.559	476.89	42.627	4.736	⊗	\$1,423.80	3.7	<a href="#">BluePoint 30 Yr FHA Standard</a>

---

**Loan Programs Requiring Additional Borrower Info**

None

---

[+ Display Ineligible Loan Programs](#)

## UPLOADING SUBMISSION PACKAGE

8. Click – Loan number which is to be submitted
  - a. Click - Open EDocs



Welcome,

[ Log Off ]

Portal Mode: **Broker**

Broker Pipelines

- Loans
- Tasks
- Conditions

QuickPricer

Create New Loan

Broker Resources

Manage Users

My Profile

Loans | Conditions | Tasks

Search

Display most recent 25 loans assigned to anyone

Loan Number	Conditions	Tasks	Last Name	First Name	Loan Amount	Loan Status	Status Date	Lock Status	Lock Exp Date	Loan Officer	Processor
901											
view 1003 status											
view app-pkg certificate											
<b>open EDocs</b>	6 Conditions	1 Task			\$	Registered		Locked			
order services								view confirmation			
extend lock											
Credit Plus - Settlement Services Worksheet (SSW)											
901	0 Conditions	1 Task			\$	Loan Canceled					

## UPLOADING SUBMISSION PACKAGE

9. Click – Select Doc Type
  - a. Select: **\*\*NEW FILE UPLOAD\*\*** -> Initial Loan Package Upload
  - b. Repeat Process for multiple uploads. (Type a description if necessary). *Can upload only 6 at a time.*
  - c. For multiple borrowers – select correct one
  - d. YOU'RE DONE – Any question or concerns, please direct them to your AE.

Back to Loan Pipeline    Loan Number: [REDACTED]    Borrower Name: [REDACTED]    Loan Amount: [REDACTED]    Property Address: [REDACTED]

Upload Docs    Fax Docs    Document List

You may upload up to 6 PDFs at a time with a total upload size of 50MB.

Doc Type / Application	File Upload	Description
<b>**NEW FILE UPLOAD**</b> : INITIAL LOAN PACKAGE UPLOAD <small>select Doc Type or scan barcodes</small>	Choose File    submit 1.pdf	<input type="text"/> 0 of 200 characters
No Doc Type Selected <small>select Doc Type or scan barcodes</small>	Choose File	<input type="text"/> 0 of 200 characters

+ Add Doc    Upload Docs

**Select a Doc Type**  
Search for:     Search

Choose a Doc Folder  
Folder

- \*\*NEW FILE UPLOAD\*\***
- \*\*OUTSTANDING CONDITIONS\*\***
- APPLICATION
- APPRAISAL
- ASSETS
- BORROWER
- COMPLIANCEEASE
- CREDIT
- DATA VERIFY
- DISCLOSURES
- DOCMAGIC
- ESCROW
- FHA DISCLOSURES
- FILE UPLOAD EARLY DISCLOSURE REQUEST
- FINAL CLOSING PACKAGE
- INCOME
- INITIAL DISCLOSURE PACKAGE - BROKER

Close