a MORTGAGE Boutique
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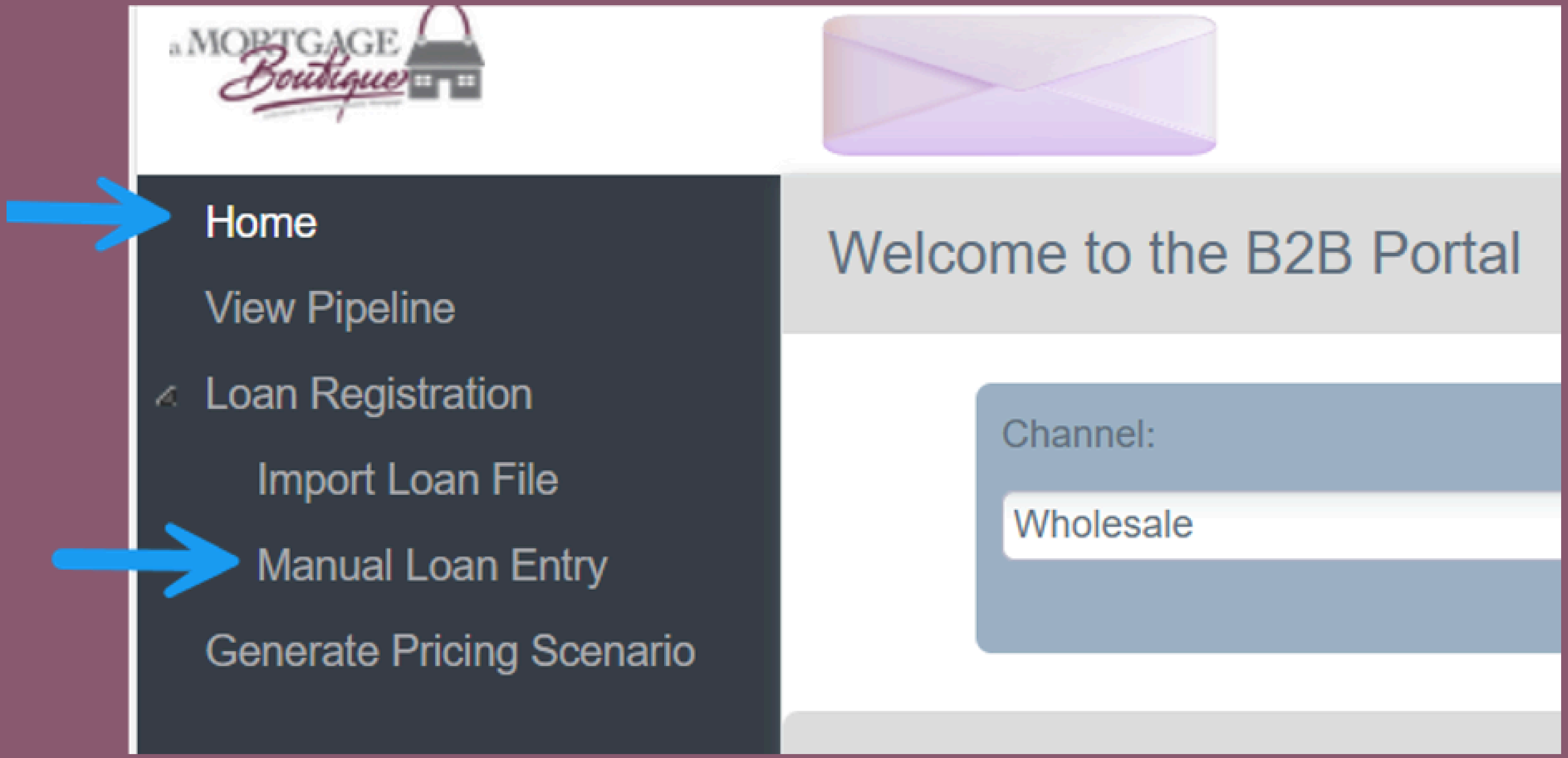
first community mortgage

How to Submit for Income Calculations

https://portal.welovetpo.com/portal/#/login

How to quickly register and securely upload income documentation for income review on a file without uploading a full 3.4 file. Using our TBD process we can review income docs for your potential borrowers.

Once logged into the Blue Sage Portal from the home screen select Manual Loan Entry

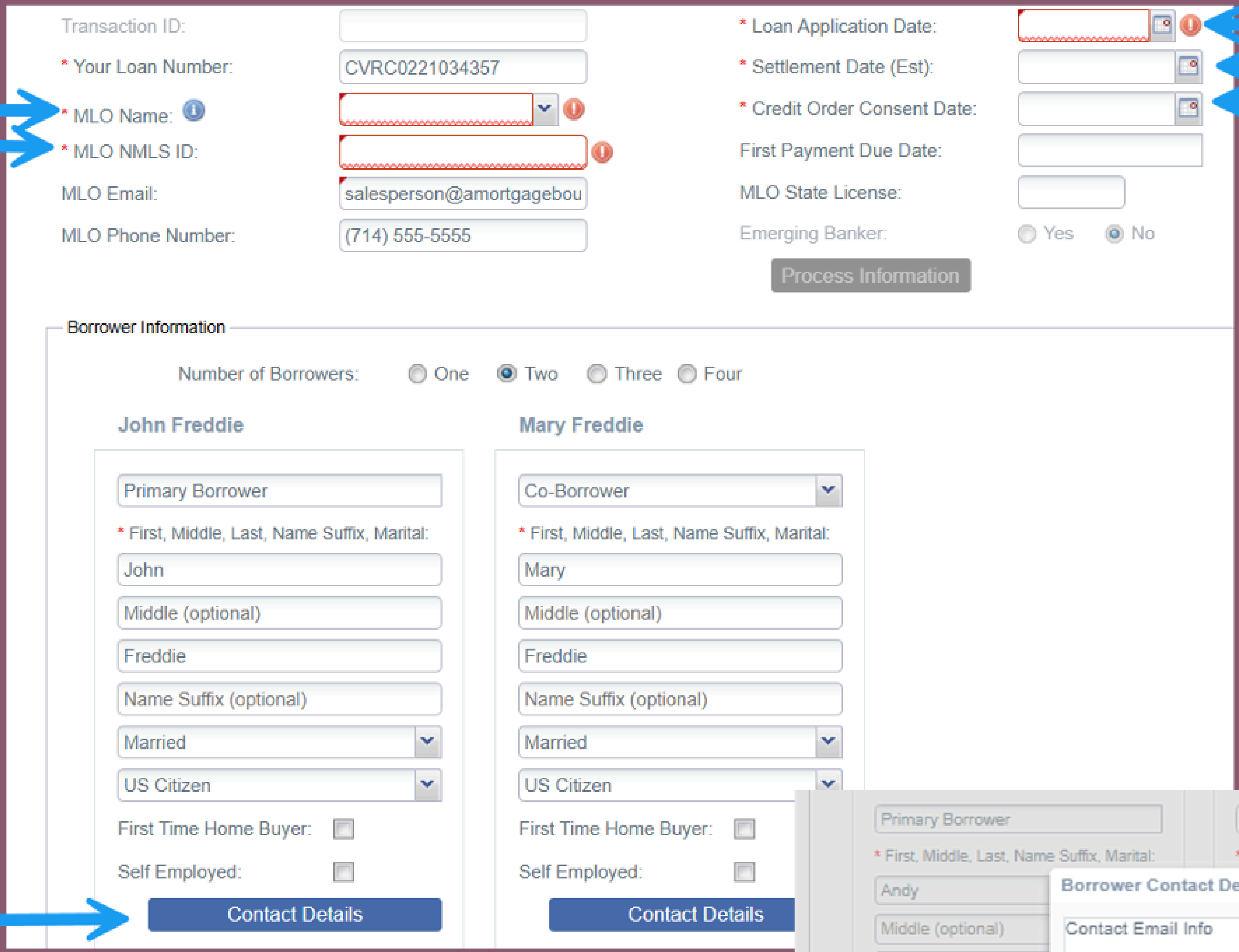


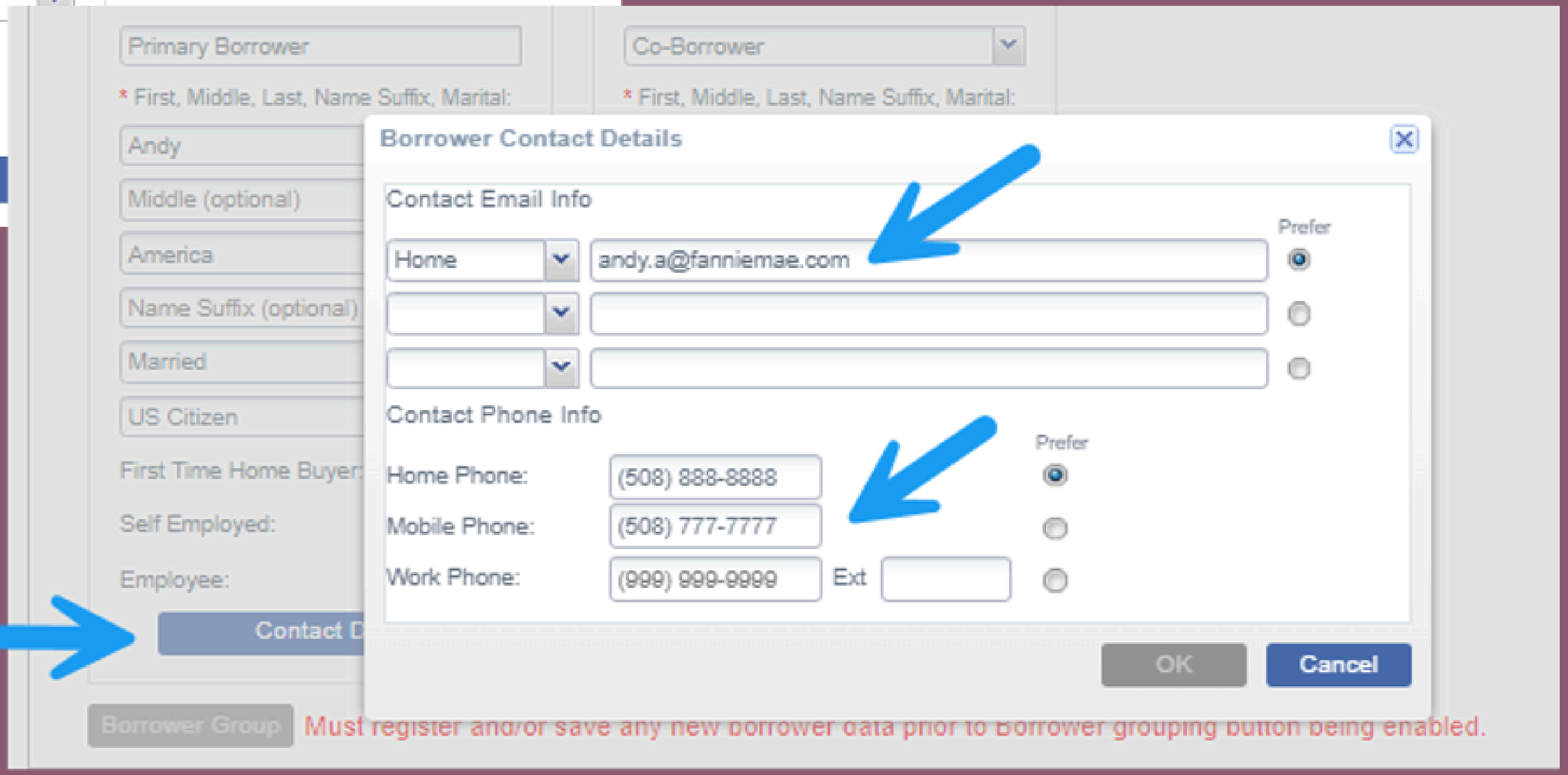
Getting Started

Manual Loan Entry

Please file in screen

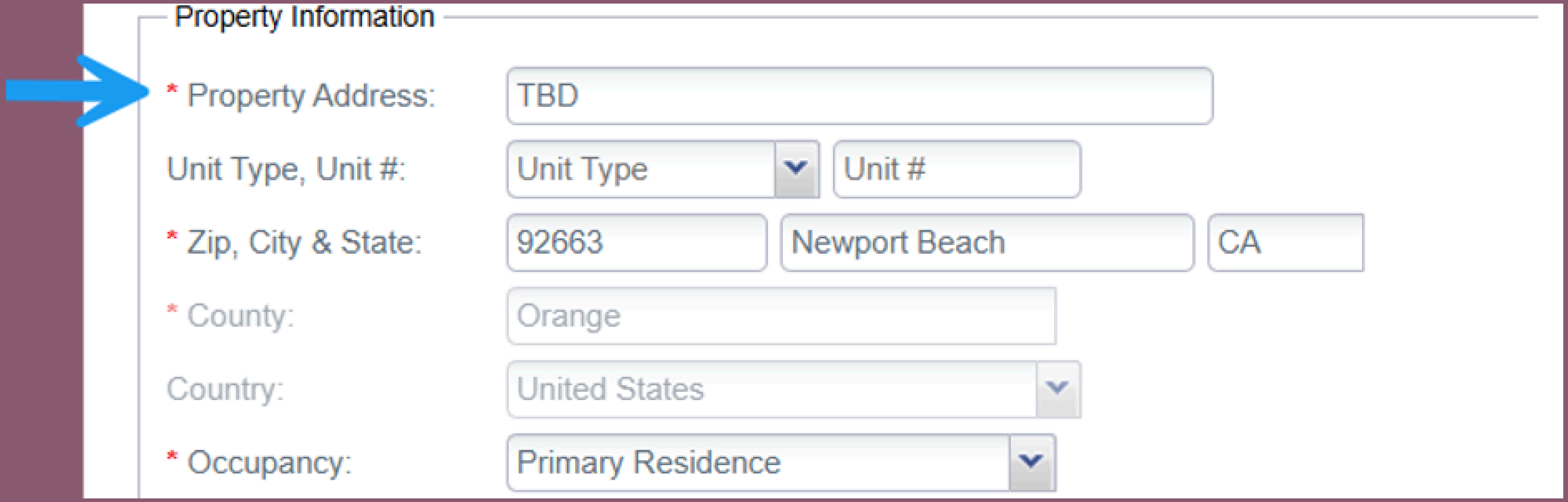
- MLO Name, NMLS ID, Phone Number, & Email Address
- Your loan number can be the borrowers last name
- Please make the application date, the current date, and estimated settlement date are entered in at registration. Once you have Income calculations, a property identified, a new 1003 will be imported in and will override the initial registration information.
- Borrower Contact Details – confirm email and mobile phone number for disclosure purposes when the file moves from a TBD to a complete loan application.





Manual Loan Entry

**NOTE - For Income Calculations please enter “TBD” as the street address, enter the city, state, and zip code. Please do not add any else to the street address except TBD (for example do Not add numbers “12345 TBD”)

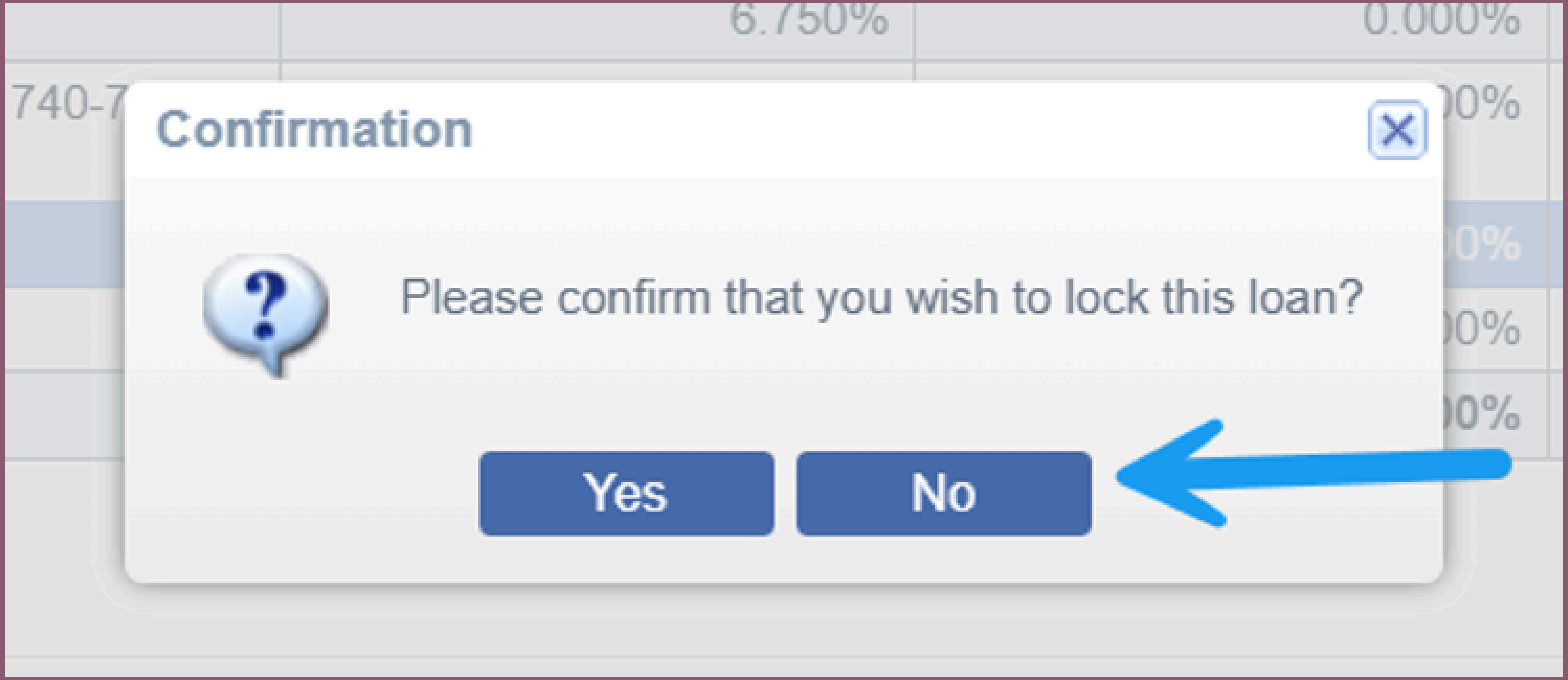

Property Information

* Property Address:	TBD
Unit Type, Unit #:	Unit Type · Unit #
* Zip, City & State:	92663 · Newport Beach · CA
* County:	Orange
Country:	United States
* Occupancy:	Primary Residence

TBD Address

Please fill out the form completely and be sure to select the correct product description by clicking on the magnifying glass. Once complete, click Register at the bottom on the page
The file will need to be registered with a loan number for the income calculations.

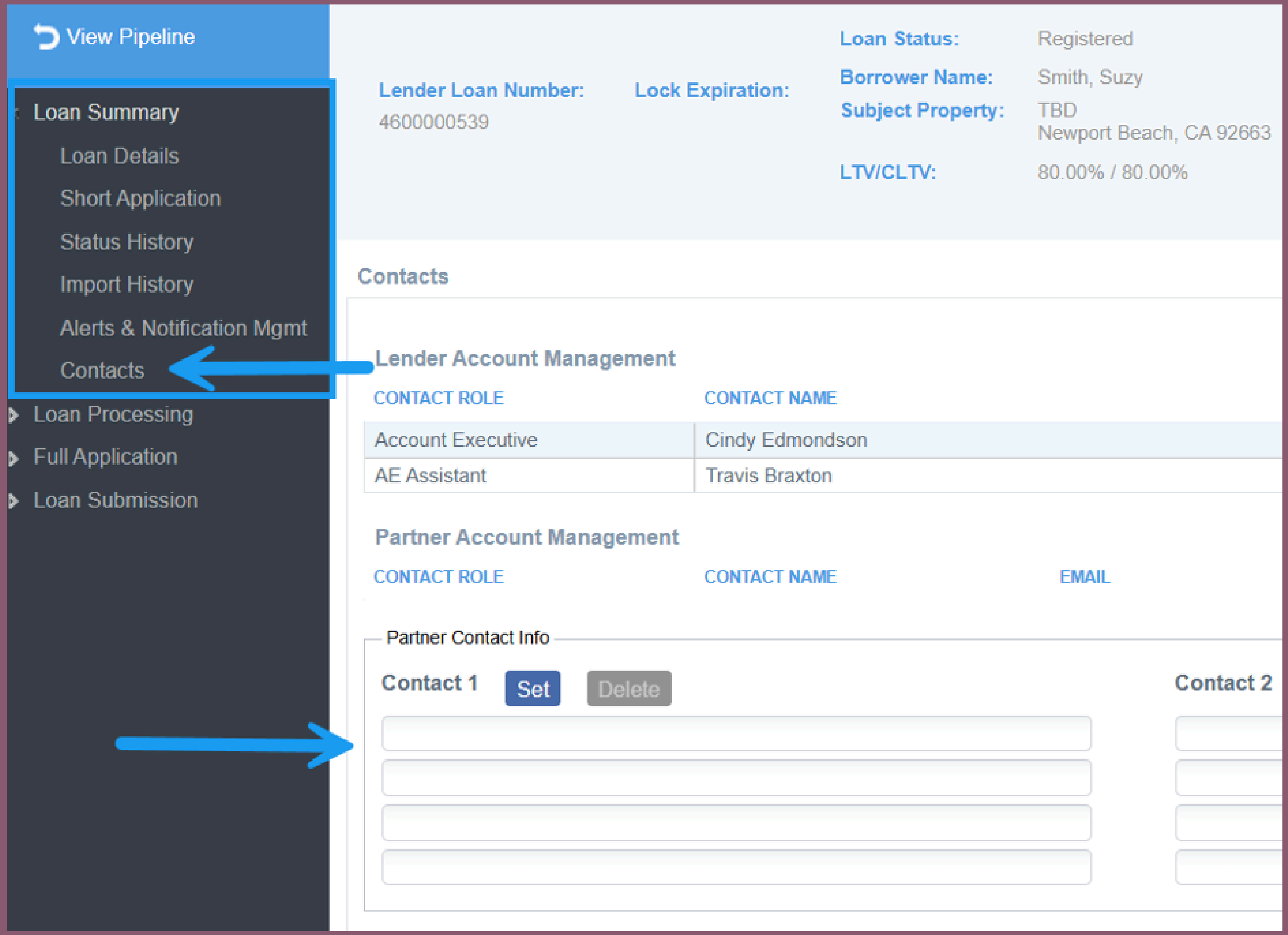
**NOTE - Please do not lock the loan while income calculations are in progress. Once the income has been calculated and a property identified and entered the system, you may then lock file.



Register and Float File

Please review registration under Loan Summary on left side of screen to confirm all information.

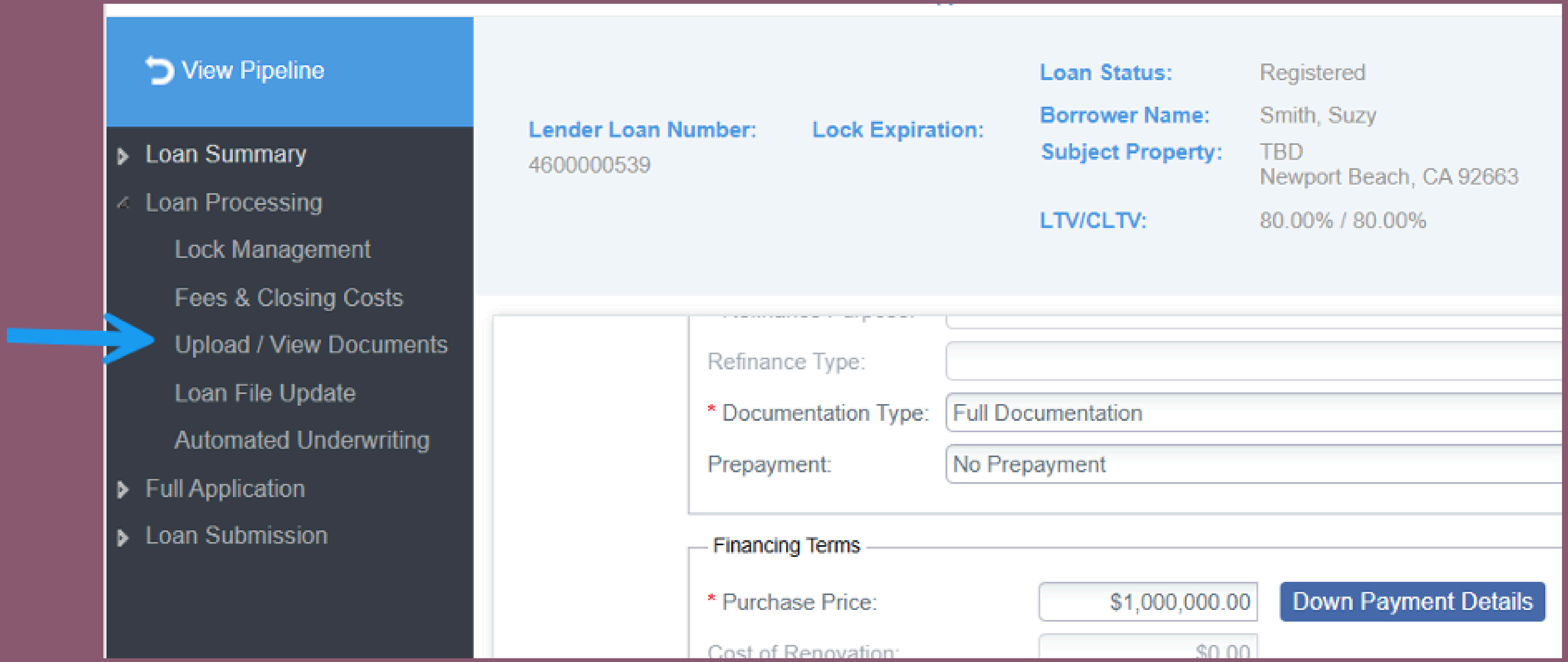
- Loan Details
- Short Application
- Contacts- make sure to enter the Loan Officer and processor as file contacts. This is where you will note parties to receive automated email updates



Loan Summary

Once the file is Registered as a TBD for income calculations, proceed to upload your Income documents and the AMB Income Calculation Form. (Contact AE for Form)

To upload from left hand tool bar select Loan Processing, then Upload /View Document



Once everything has been uploaded please contact your AE who will be your primary point of contact. Please Do NOT submit the loan into UW by using the loan submission function.

Secure Document Upload & Contact your Account Executive