
Quick Express Guide to the Borrower Dashboard

Cardinal Financial Company - Wholesale

TABLE OF CONTENTS

Urgent	2
Required	2
Optional	2
References	3
Revision History	3

Dear Borrower (Insert Name)

URGENT: Please follow the below steps as soon as you receive your activation link. Delaying this process can impact your loan and your locked interest rate.

Required:

1. Open your activation email with the Subject Line: Your Octane Loan Invitation
2. Follow the Access link
 - a. Create Password (Something you can remember) plus Challenge Questions.
Optional 2 step verification
3. Enter your 5-digit numeric Loan Key
 - a. Contact your Loan Officer if you do not have the Key)
4. Click Packages to E-sign
5. Click Review / E-sign
6. E-sign through DocuSign

Optional:

1. Navigate back to your portal
2. Download and Print all Documents under “Complete and Upload”
3. Upload wet signed documents

References

Reference List
Octane https://online.cardinalfinancial.com/#/p/signon

Revision History

Date	Description	Approver
10.8.20	Revision	Nyreen Huyser
3.4.2021	Revision	Timothy Williams
