
Sticky Filters in Octane

Cardinal Financial Company - Wholesale

TABLE OF CONTENTS

What is a Sticky Filter?	2
Locating the Sticky Filters	2
Pipeline Screen	2
There are 7 different fields to filter through	3
Documents Screen	4
Types of Filters	5
References	7
Revision History	7

What is a Sticky Filter?

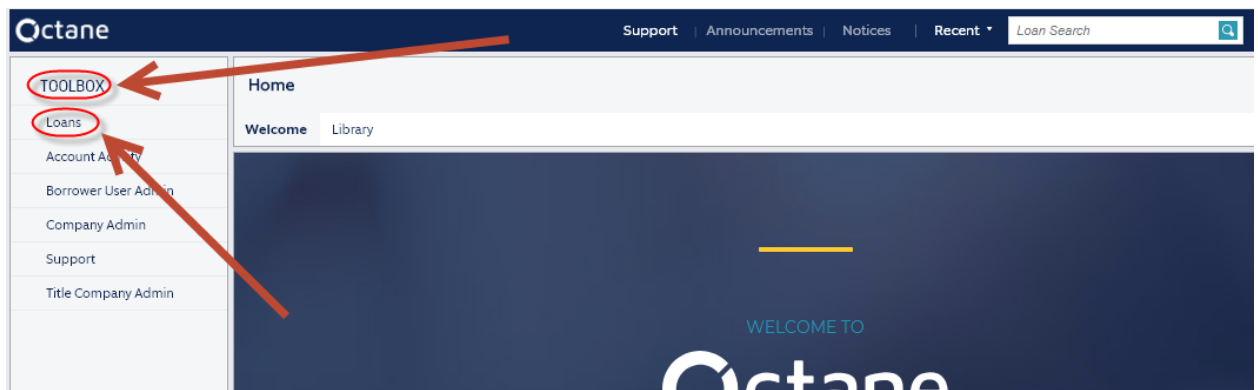
This is a tool in Octane that will help declutter your pipeline view and smart documents only showing what you would like to have displayed.

NOTE: The filter settings will not reset unless there is a system update so make sure you are aware of your set up.

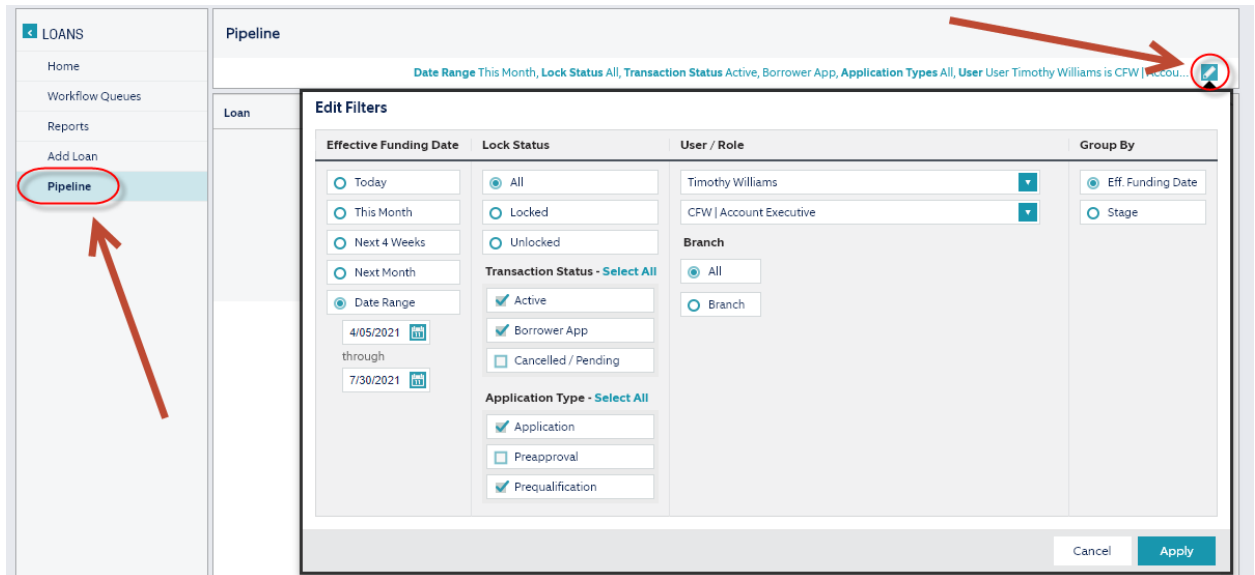
Locating the Sticky Filters

Pipeline Screen

- This is located in the Loan ToolBox on the left hand side of Octane's main Home Screen.



- Ensure you select the “Teal Pencil” over on the right hand side of the screen to edit the filters.



There are 7 different fields to filter through

1. Effective Funding Date
 - a. Today
 - b. This Month
 - c. Next 4 Weeks
 - d. Next Month
 - e. Date Range - Must be a 3 month range
2. Lock Status
 - a. All
 - b. Locked
 - c. Unlocked
3. Transaction Status
 - a. Active
 - b. Borrower App
 - c. Cancelled/Pending
4. Application Type
 - a. Application
 - b. Pre Approval
 - c. Prequalification
5. User/Role
 - a. User Name
 - b. Performer Role

6. Branch
 - a. All
 - b. Branch
7. Group By
 - a. Eff. Funding Date
 - b. Stage

Documents Screen

- This is located on the left hand side of Octane inside a loan application. Then select the "Teal Pencil" on the right hand side to edit the filters.

The screenshot shows the 'Documents' screen in Octane. On the left is a navigation menu with 'Documents' highlighted. The main area displays a table of documents with columns: Name, For, Category, Prior To, Incl. Files, Fulfillment, Decision, and File Status. A filter dropdown is set to 'All Documents'. A teal pencil icon in the top right corner is circled in red, with an arrow pointing to it from the text above. Another arrow points from the text above to the 'All Documents' filter dropdown.

Name	For	Category	Prior To	Incl. Files	Fulfillment	Decision	File Status
Advanced Fee Agreement Disclosure - Utah	Kyle and Julie Clark's loan	Compliance	Approval	1 of 1	Unfulfilled	Pending	Requested
Anti-Steering Disclosure (Wholesale)	Kyle and Julie Clark's loan	Compliance	Approval	1 of 1	Unfulfilled	Pending	Requested
Borrower's Certification and Authorization (E-Sign)	Kyle J. Clark	Compliance	Approval	1 of 1	Unfulfilled	Pending	Requested
Borrower's Certification and Authorization (E-Sign)	Julie B. Clark	Compliance	Approval	1 of 1	Unfulfilled	Pending	Requested
Letter of Explanation Cash Out Proceeds (E-Sign)	Loan	Compliance	Approval	1 of 1	Not Required	Pending	Requested
Notice of Intent to Proceed with Loan Application	Kyle and Julie Clark's loan	Compliance	Approval	1 of 1	Unfulfilled	Pending	Requested
Personal Tax Return Transcript for 2017 Tax Year	Kyle J. Clark	Income	Approval	0 of 0	Unfulfilled	Pending	Unrequested
Personal Tax Return Transcript for 2018 Tax Year	Kyle J. Clark	Income	Approval	0 of 0	Unfulfilled	Pending	Unrequested
Personal Tax Return Transcript for 2019 Tax Year	Kyle J. Clark	Income	Approval	0 of 0	Unfulfilled	Pending	Unrequested

The screenshot shows the 'Edit Filters' dialog box in Octane. The 'All Documents' filter is selected in a dropdown menu. Below the dialog is the same document table as in the previous screenshot. A teal pencil icon in the top right corner of the dialog is circled in red, with an arrow pointing to it from the text above. Another arrow points from the text above to the 'All Documents' filter dropdown.

Types of Filters

1. All Documents
 - a. All documents you can access on a loan
2. Borrower - Unreceived

-
- a. All borrower-provided documents that have been requested, unfulfilled requirements, with no files.
 3. Borrower - Received
 - a. All borrower-provided documents that have been received with files.
 4. Borrower - Re-Requested
 - a. All borrower-provided documents that have been re-requested, are unfulfilled and have included files.
 5. Borrower - Complete
 - a. All borrower-provided documents that have been received, fulfilled, and approved.
 6. Borrower - Unrequested
 - a. All borrower-provided documents that are fulfilled and approved but unrequested.
 7. Broker - Unreceived
 - a. All broker- and borrower-provided documents that have been requested, unfulfilled requirements, with no files.
 8. Broker - Received
 - a. All broker- and borrower-provided documents that have been received and fulfilled, is pending a decision, with files.
 9. Broker - Re Requested
 - a. All broker- and borrower-provided documents that have been re-requested, are unfulfilled and have included files.
 10. Broker - Complete
 - a. All broker- and borrower-provided documents that have been received, fulfilled, and approved.
 11. Broker - Unrequested
 - a. All broker- borrower-provided documents that are fulfilled and approved but unrequested.
 12. Custom Forms
 - a. All documents sourced from custom forms.
 13. Ready for me to Decision
 - a. All documents with decision pending, rejected, or approved, that you can 'decision' and have a file with include-status Unknown.
 14. Ready for me to Fulfill
 - a. All documents with fulfill status working or unfulfilled, that you can fulfill.
 15. Requires Attention
 - a. All documents that have been received, fulfill status is working or unfulfilled, or decision status is pending.

16. Prior to Approval - All
 - a. All PTA documents.
17. Prior to Approval - Unapproved by Provider
 - a. All unapproved PTA documents sorted by provider.
18. Prior to Approval - Unapproved by Category
 - a. All unapproved PTA documents sorted by category.
19. Prior to Document - All
 - a. All PTD documents.
20. Prior to Document - Unapproved
 - a. All unapproved PTD documents.
21. Prior to Funding - All
 - a. All PTF documents
22. Prior to Funding - Unapproved
 - a. All unapproved PTF documents.
23. Prior to Delivery - All
 - a. All PTDL documents.
24. Prior to Delivery - Unapproved
 - a. All PTDL documents.
25. Advanced
 - a. Fields to Filter Through
 - i. Files, File Status, Fulfillment, Prior To, Provider, Decision, Category, Source, Role, Group By, Trash

Edit Filters

Advanced ▼

Files

Files

File Status Unknown

No Files

File Status

Requested

Re-requested

Received

Unrequested

N/A

Fulfillment

Unfulfilled

Working

Fulfilled

Not Required

Decision

Pending

Rejected

Approved

Waived

Not Required

Prior To

Approval

Document

Funding

Delivery

Provider

Not Applicable

Lender

Borrower

Broker

Category

Income

Asset

Credit

Property

Legal

Compliance

Miscellaneous

Source

Custom Form

Standard Form

External

No File Required

Role

Any Role

Decision

Fulfill

Decision or Fulfill

Group By

Provider

Category

Trash

Hide Trash

Trash Only

Tip: At least one choice must be selected in each filter.

Cancel Apply

References

Reference List

[Octane](#)

Revision History

Date	Description	Approver
12.23.2020	Initial Revision	Timothy Williams
4.6.2021	Revised	Timothy Williams
