Sticky Filters in Octane
Cardinal Financial Company - Wholesale

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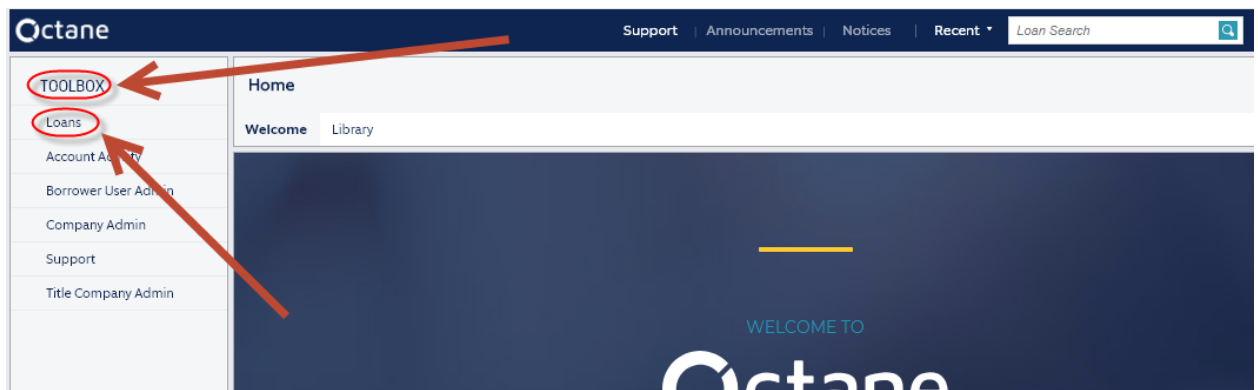
What is a Sticky Filter?

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.
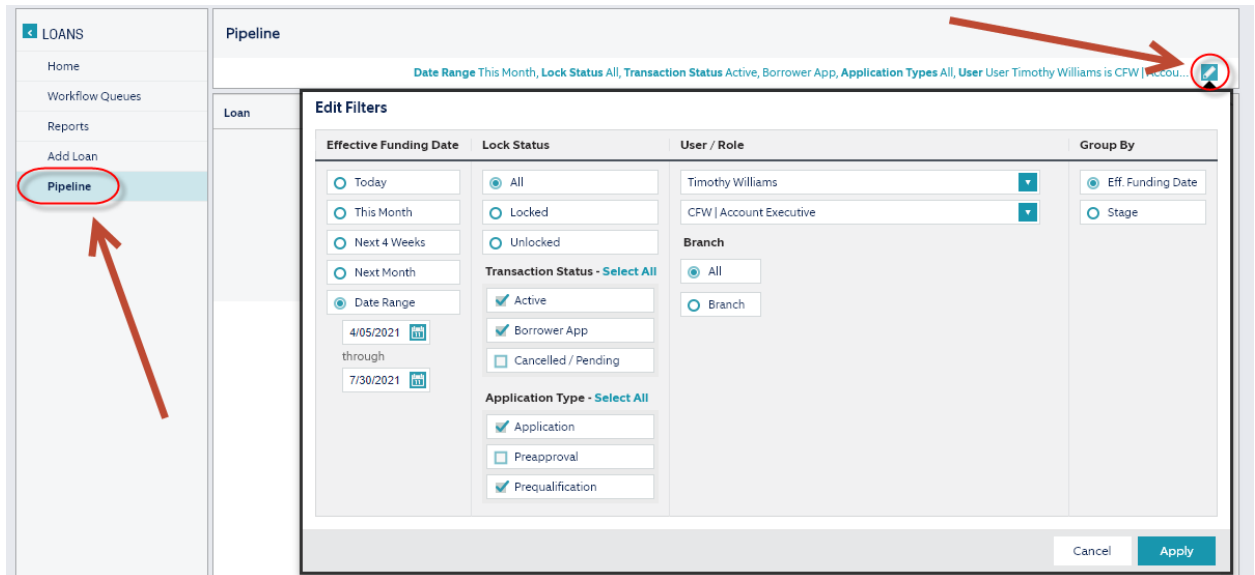
Locating the Sticky Filters

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 ride hand side to edit the filters.

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 - Compete
   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

References

Reference List
[Octane](#)

Revision History

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