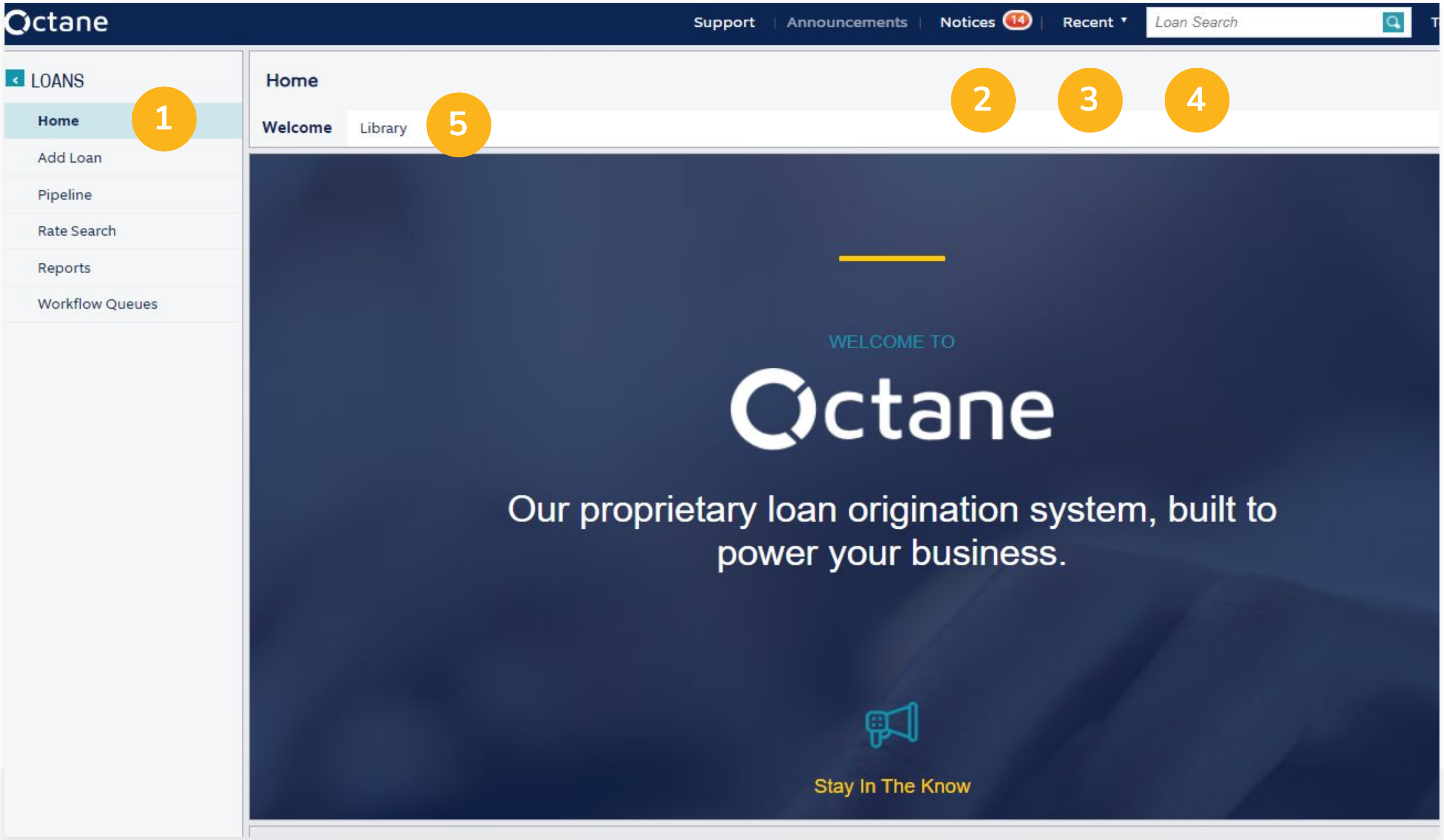
Navigating Octane

Your step-by-step guide

WHOLESALE
A DIVISION OF CARDINAL FINANCIAL, NMLS 66247

Becoming Familiar with the Homepage

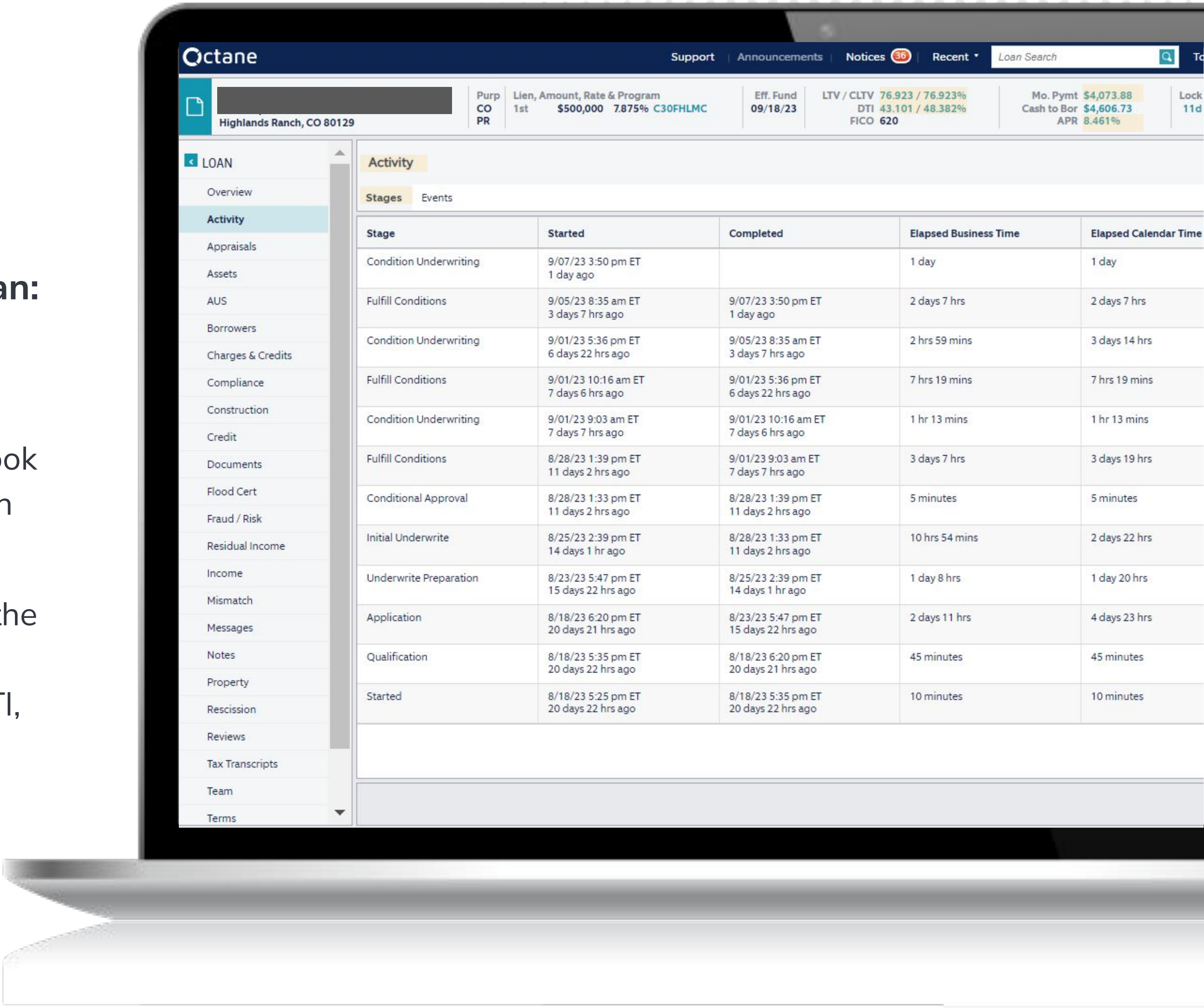
1. The **Main Menu** on the left-hand side is your primary navigation tool within Octane. The menu selection changes with each level of the site.
2. **Notices** is where you get notified anytime you are tagged in a file.
3. **Recents** will take you to your most recently accessed loans.
4. **Loan Search** is a tool you can use to find a specific loan using the borrower name or loan number.
5. **Library** contains resources and guides to answer all of your questions.



Loan Screen

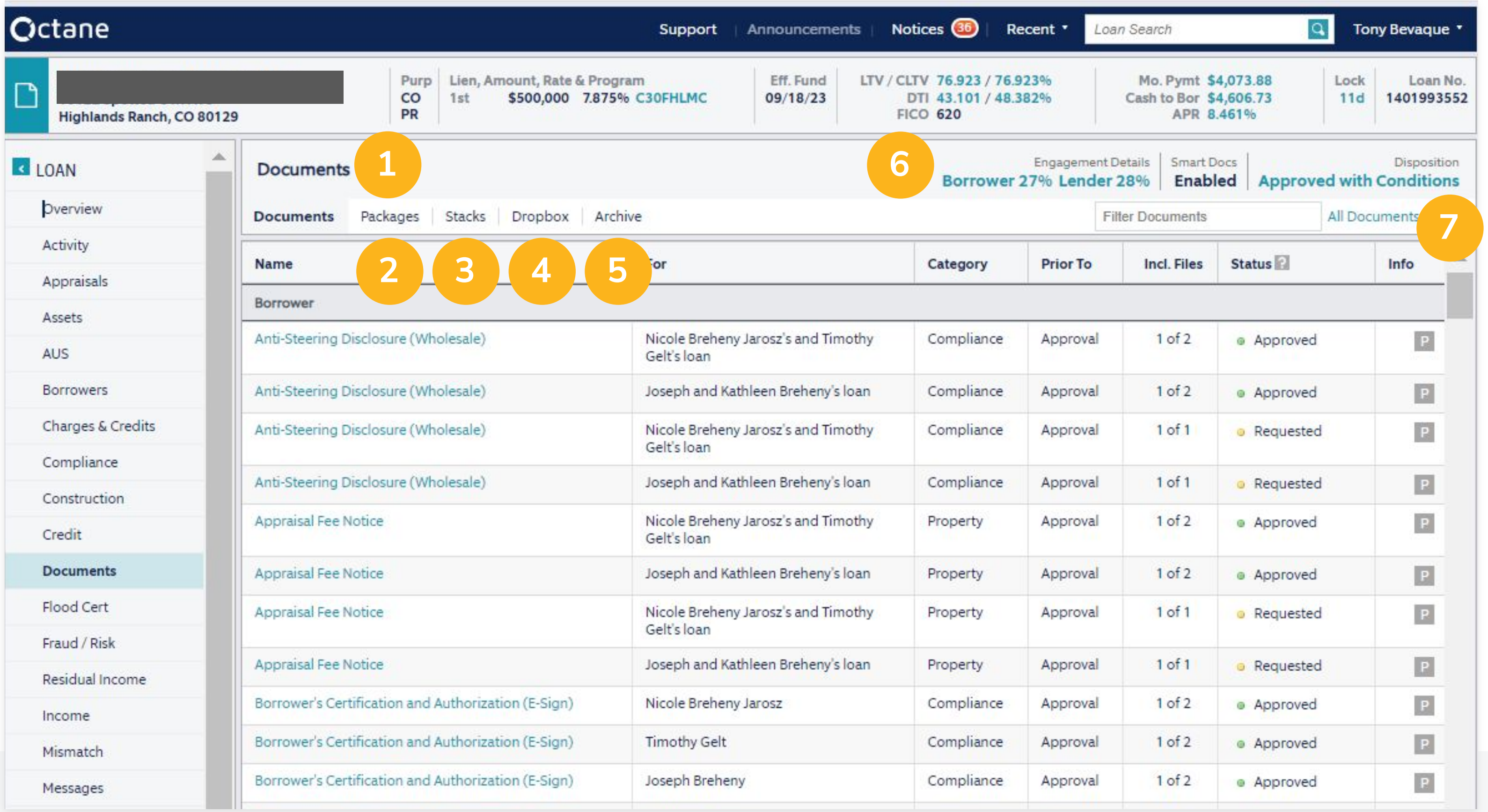
Once you are in the Loan screen, you can:

- Click on **Activity** to see which stage of the process your loan is currently in.
- Navigate to the **Events** tab for a detailed look into all of the action that has taken place on the loan.
- View the **Loan Details** menu at the top of the screen, which contains figures about the specific loan. Want to see what is in the DTI, for example? Give it a click and see the additional details.



Documents Screen

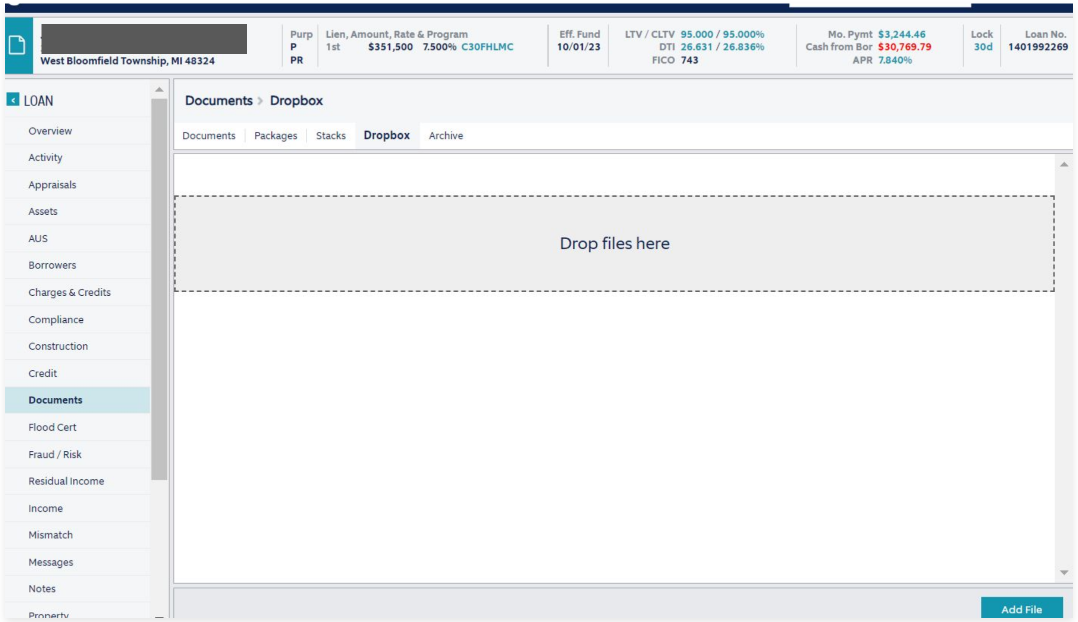
1. The **Documents** tab will show you all the files that have been added to this loan.
2. **Packages** displays the packages that have been sent to the borrower and if they have been signed.
3. **Stacks** allows you to create single pdfs of a full package for compliance, etc.
4. **Dropbox** is our easy-upload location for documents.
5. **Archive** is the holding place for all documents that are no longer needed.
6. **Engagement Details** shows how far along the borrower's file is in the process.
7. **Disposition** shows your conditions if you click on the status. Note: This automatically updates as the loan progresses.



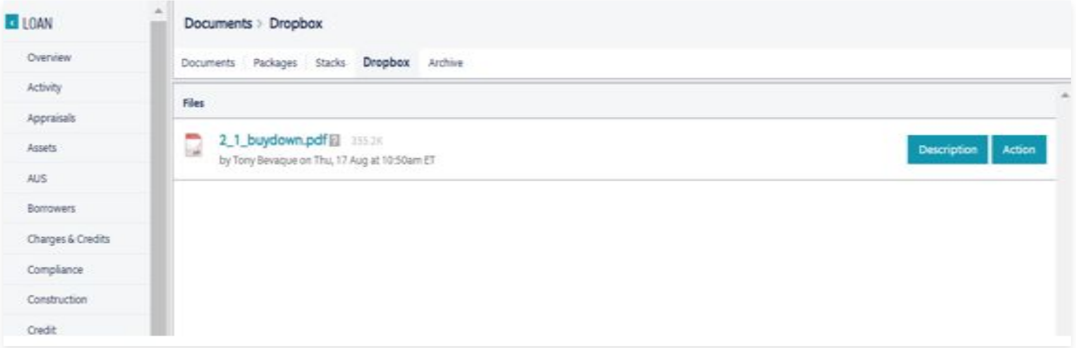
Dropbox

- To add files to the **Dropbox**, you can simply drag and drop from your desktop into the grey box, or click **Add File**.
- Once the files have fully loaded, you will have the ability to either add a description or note.
- Clicking on **Action** allows you to manage the file in a various ways.

Before

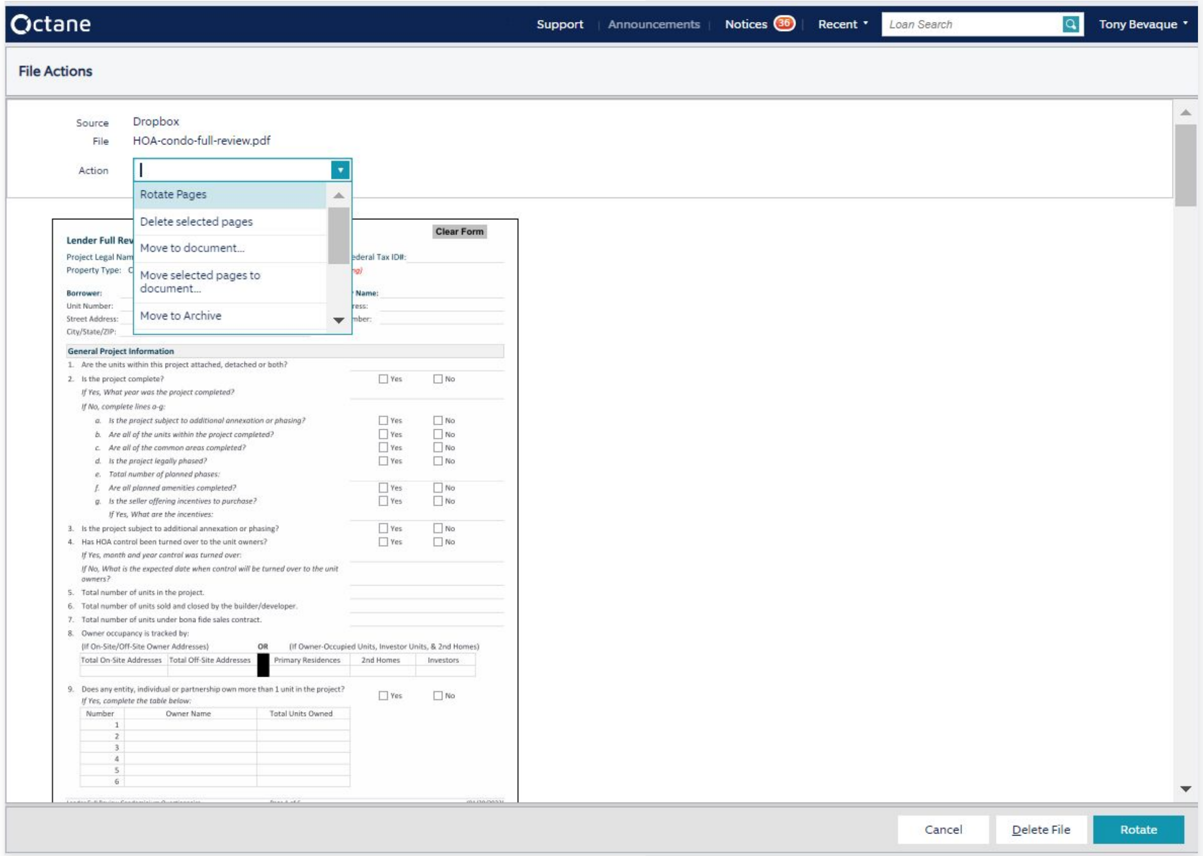


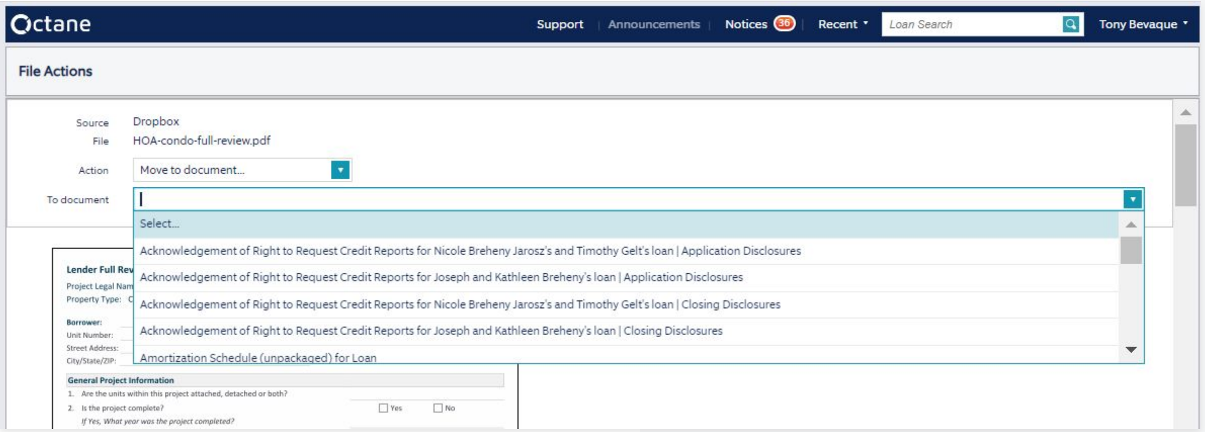
After



File Actions within the Dropbox

- The **Action** dropdown menu is where you can assign the file to a specific category or location.
  - If you select **Move To Document**, you can click on the second drop down and type out the document name or scroll to find it.
  - Bucketing the conditions will ensure they get seen and aren't lost in set up.
- You can also rotate or delete the file if needed by clicking the buttons in the bottom right corner.



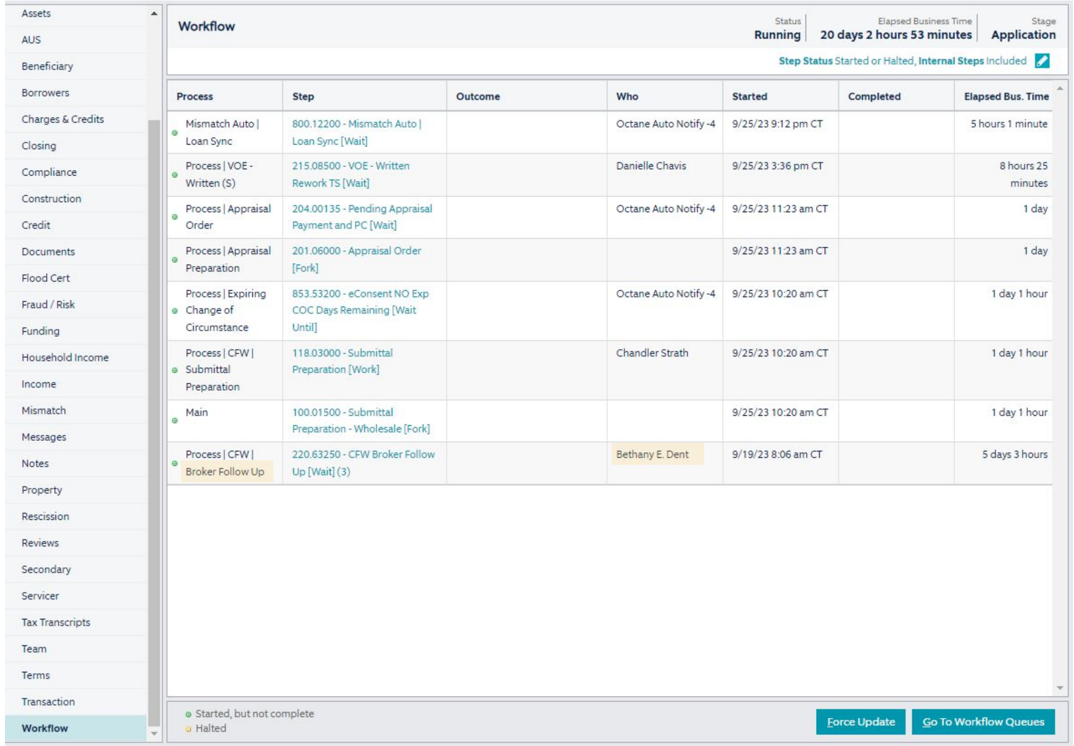


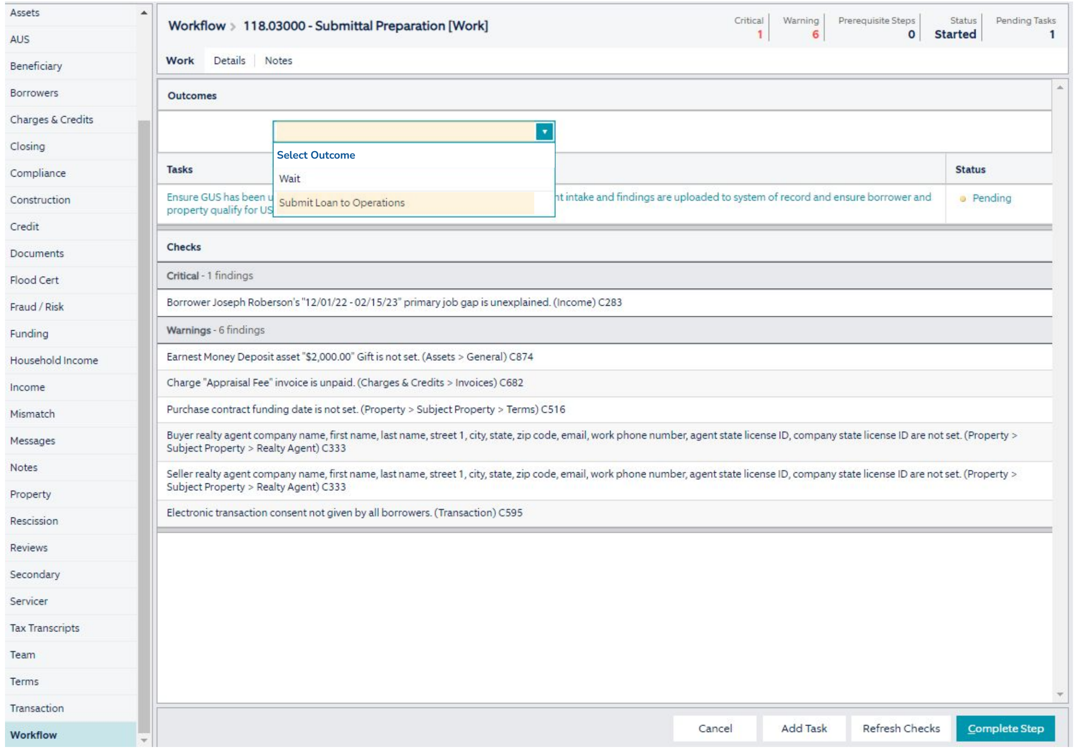
Workflows

To get to the **Workflows** screen, Navigate to the **Main Menu** (side bar) and scroll down until you see the selection.

Clicking the **Workflow** selection will open right into your workflow step.

You can click on **Submit Loan To Operations** and then click **Complete Step** to send to underwriting.





Next Steps

- Once the loan goes to **Set Up**, our underwriting team will email you if anything is missing.
- Underwriting will review all the documents and details before setting conditions.
- You will be emailed once the file releases.
- Questions? Feel free to contact your Account Executive, or your WCA.

Thank you!

Questions? Get in touch anytime.

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