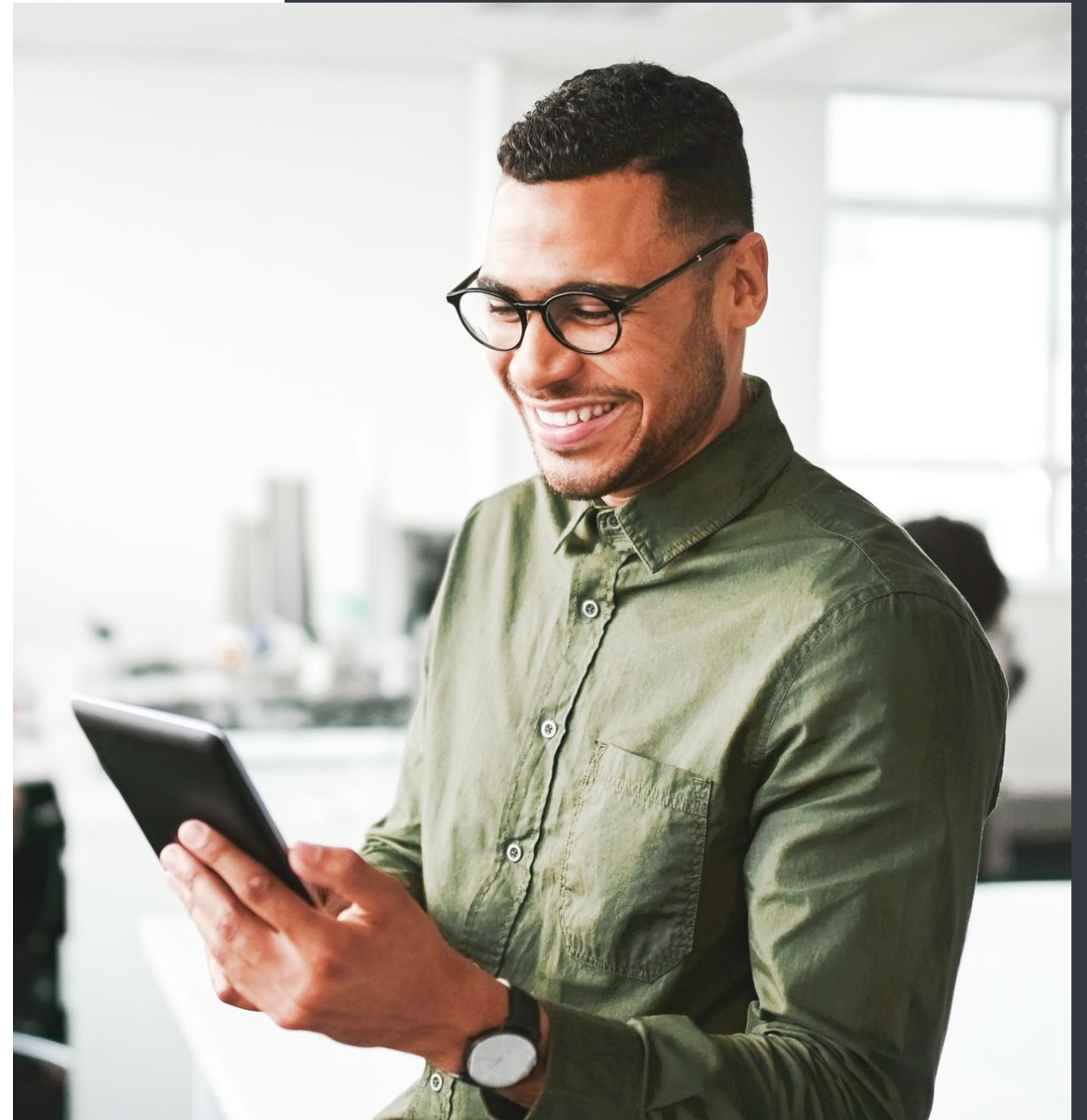


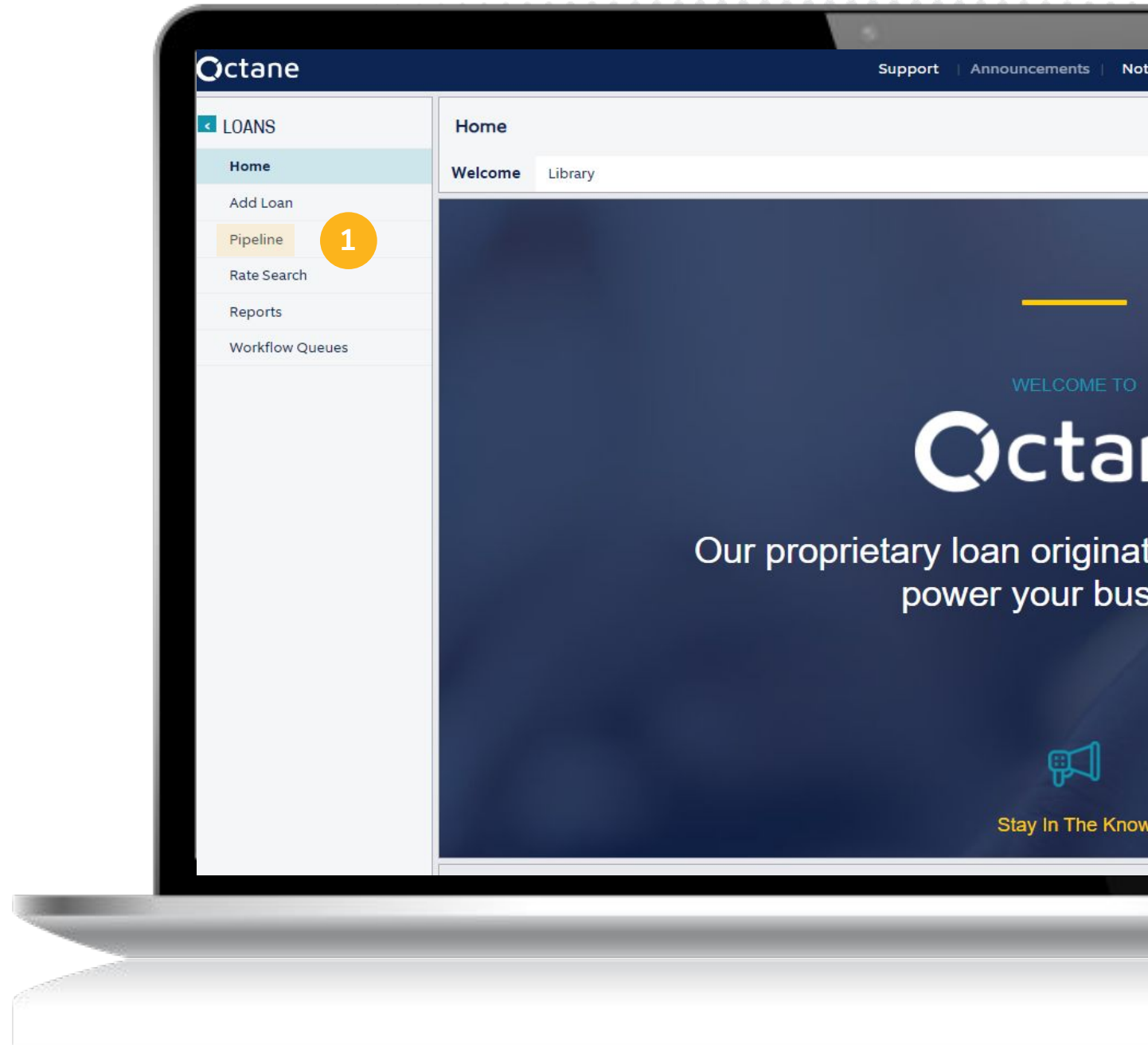
Accessing Pipeline View & Reports in Octane

Your step-by-step guide



First things first

1. To access **Pipeline View**, click on **Pipeline** in the left side menu.



Select your filters

2. Click on the pen icon in the top right corner to open the **Filters** menu.

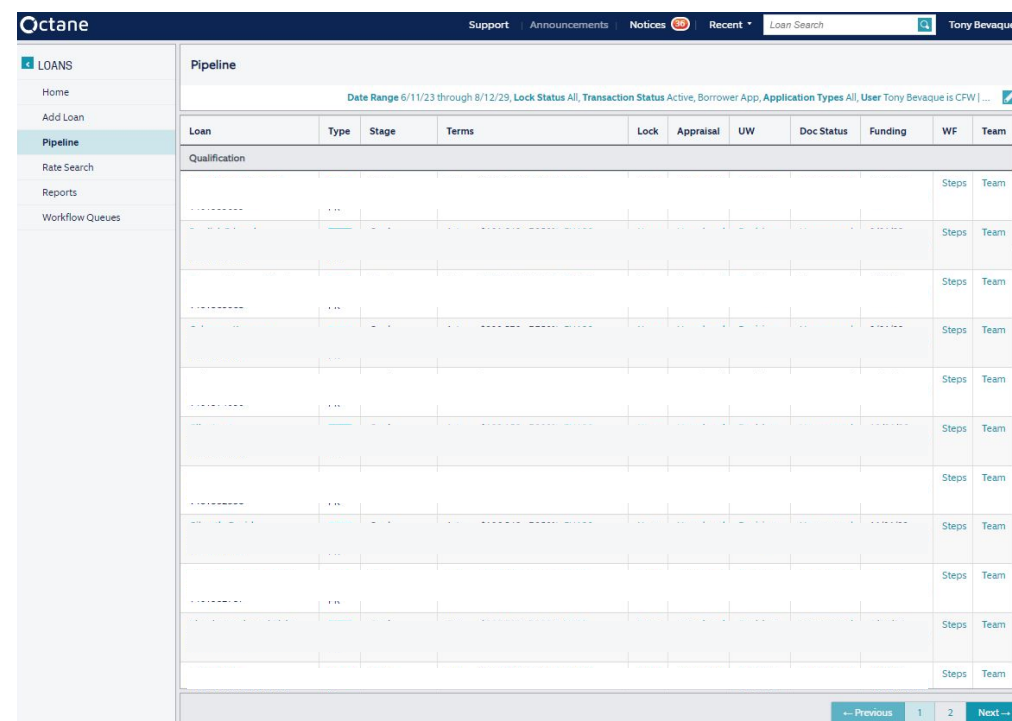
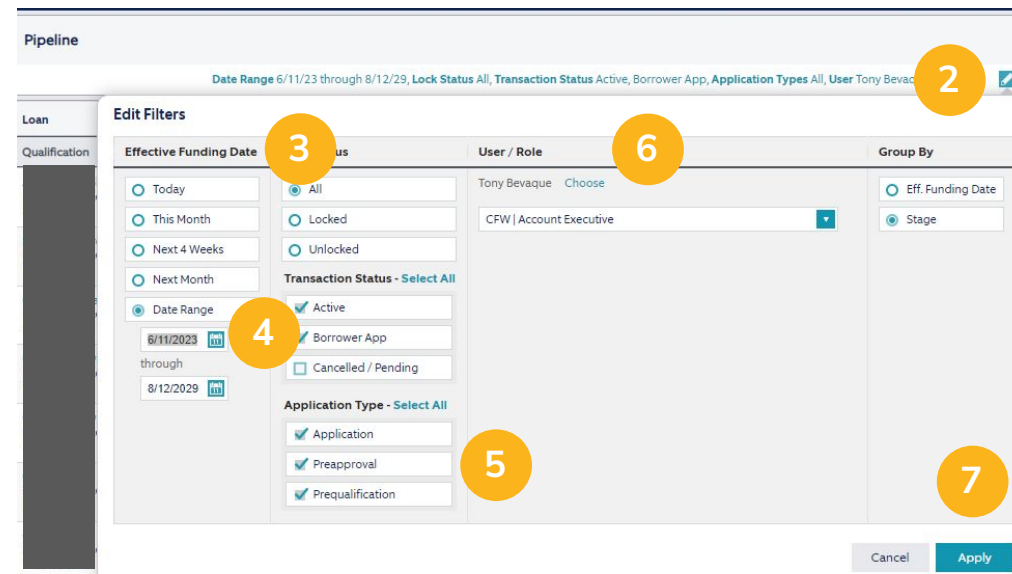
3. Click **Effective Funding Date** and select the date range.

4. Click on the calendar date and change the year to several years out.

5. Make sure all **Application Types** are marked.

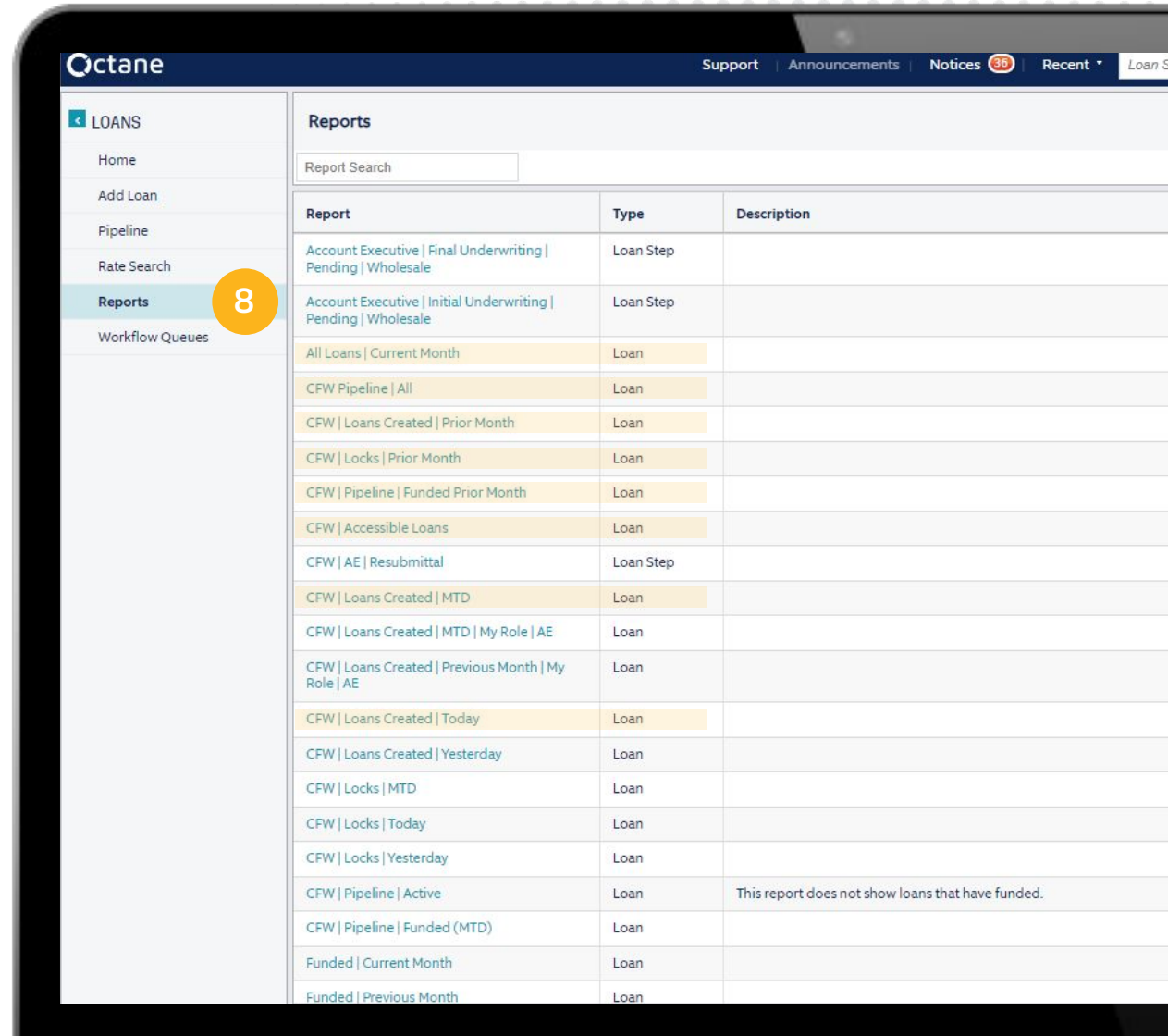
6. Select the proper role for you.

7. Click **Apply** to view the list of loans within your set parameters.



Home stretch

8. Click **Reports** to view several reports that will allow you many different views of your pipeline, locks, and more.



The screenshot shows the Octane web application interface. The top navigation bar includes the Octane logo, a search bar, and links for Support, Announcements, Notices (with a 36 notification badge), and Recent. The left sidebar contains a menu with options: Home, Add Loan, Pipeline, Rate Search, Reports (highlighted with a blue bar and a yellow circle containing the number 8), and Workflow Queues. The main content area is titled 'Reports' and features a 'Report Search' input field. Below this is a table listing various reports.

Report	Type	Description
Account Executive Final Underwriting Pending Wholesale	Loan Step	
Account Executive Initial Underwriting Pending Wholesale	Loan Step	
All Loans Current Month	Loan	
CFW Pipeline All	Loan	
CFW Loans Created Prior Month	Loan	
CFW Locks Prior Month	Loan	
CFW Pipeline Funded Prior Month	Loan	
CFW Accessible Loans	Loan	
CFW AE Resubmittal	Loan Step	
CFW Loans Created MTD	Loan	
CFW Loans Created MTD My Role AE	Loan	
CFW Loans Created Previous Month My Role AE	Loan	
CFW Loans Created Today	Loan	
CFW Loans Created Yesterday	Loan	
CFW Locks MTD	Loan	
CFW Locks Today	Loan	
CFW Locks Yesterday	Loan	
CFW Pipeline Active	Loan	This report does not show loans that have funded.
CFW Pipeline Funded (MTD)	Loan	
Funded Current Month	Loan	
Funded Previous Month	Loan	

Thank you!

Questions? Get in touch anytime.



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