

Octane Navigation Cheat Sheet

Inside a Loan		
<p>Overview</p> <ul style="list-style-type: none"> • General • Workflow <p>Activity</p> <ul style="list-style-type: none"> • Stages • Events <p>Agency Integration</p> <ul style="list-style-type: none"> • Track/submit • LPA checks • DU checks • EC checks • VA Loan review <p>Assets</p> <ul style="list-style-type: none"> • Assets • Funds for Closing • Grants <p>Borrowers</p> <ul style="list-style-type: none"> • Borrower information <p>Charges & Credits</p> <ul style="list-style-type: none"> • Charges • Recording • IPC • Escrow selection • Taxes • Property insurance • Mortgage insurance • Escrow analysis • Invoices 	<p>Closing</p> <ul style="list-style-type: none"> • Documents • Settlement agent • Closing preparation snapshots <p>Communications</p> <ul style="list-style-type: none"> • Messages • Calls <p>Compliance</p> <ul style="list-style-type: none"> • Compare • CFPB History • Disclosures • Key Dates • ATR/QM • HMPL • HOEPA • Costs <p>Construction</p> <ul style="list-style-type: none"> • Setup • Draw Ledger • Contractors • Permits <p>Credit</p> <ul style="list-style-type: none"> • Overview (shows Credit report) • Liabilities • Net tangible benefits • Public records • Inquiries • Addresses • Achieved reports 	<p>Documents</p> <ul style="list-style-type: none"> • Documents • Packages • Stacks • Dropbox • Archive <p>Income</p> <p>Notes</p> <p>Property</p> <ul style="list-style-type: none"> • Subject property <p>Residual Income</p> <p>Reviews</p> <p>Team</p> <ul style="list-style-type: none"> • Members • Managers • Access log <p>Terms</p> <ul style="list-style-type: none"> • Terms • Locks • Concessions • Eligibility <p>Transaction</p> <p>Work Flow</p>