

Octane® Broker Account Setup

First Time User Setup

Can't get into Octane? Answer these questions first.	1
First Time User Setup	1
Pipeline and Smart Pipeline Setup	3
Smart Pipeline Not Seeing Your Loans?	4
Octane Multi-factor Bypass	5

Can't get into Octane®? Answer these questions first.

Have you accepted your invite in your email?

Are you using your USERNAME not your email?

Note: Username set up is [firstname.lastname]

Are you using Google Chrome?

Note: Octane is a web-based LOS and works best in Chrome.
Other browsers may experience functional issues.

Have you changed locations?

Note: Octane pings off known IP addresses for security purposes.
If your location changes it can require adding a new IP to your logins.

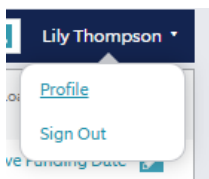
Use this link to request remote access: [Octane Remote Access Request](#)

First Time User Setup

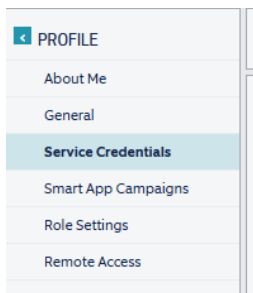
***IMPORTANT* MUST COMPLETE TO RE-ISSUE CREDIT**

When you first log in to Octane follow these steps:

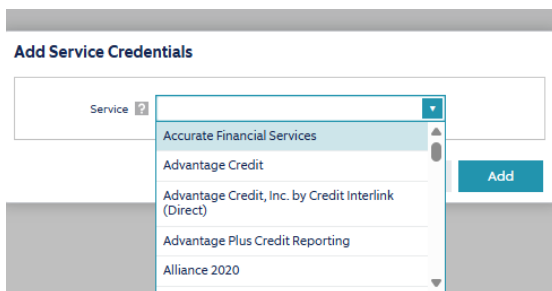
1. Go to profile.



2. Select Service Credentials from the left menu.



3. Choose Add Credentials from bottom right and choose your credit provider: enter login, and SAVE.



4. Go to General on the left-hand side navigation.

[← PROFILE](#)
[About Me](#)
General
[Service Credentials](#)

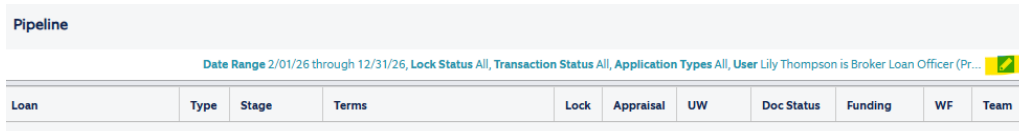
5. Choose your time zone, toggle which notifications about your loan you want to receive, and your landing page when you login—SAVE.

General

Contact Information	Account Information
<p>Name Lily Thompson</p> <p>Nickname <input type="text"/></p> <p>Title Regional Account Executive</p> <p>Email lily.thompson@cardinalfinancial.com</p> <p>Work Phone (208) 279-4839 Ext. <input type="text"/></p> <p>Mobile Phone (208) 559-4426</p> <p>RingLead Phone <input type="text"/> Ext. <input type="text"/></p> <p>Fax <input type="text"/></p> <p>Licensed Address 3530 Toringdon Way Suite 200 Charlotte NC 28277</p> <p>Physical Address 3530 Toringdon Way Suite 200</p>	<p>Username <input type="text"/></p> <p>Time Zone US/Pacific <input type="text"/></p> <p>Training Mode No</p> <p>Preferences</p> <p>E-Sign by Email <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>SMS Message Opt-In <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Note Notifications by Email <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Task Complete Landing Page <input type="text"/> Smart Pipeline <input type="text"/></p>

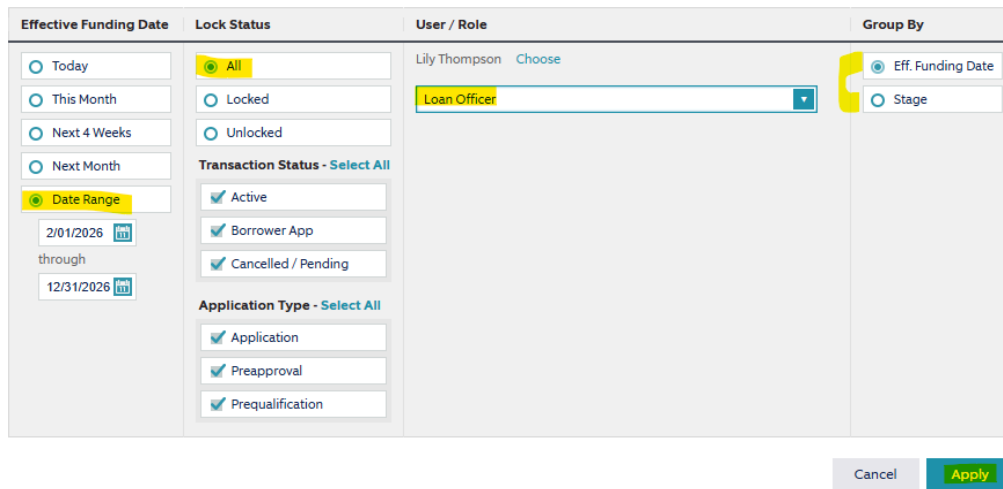
Pipeline and Smart Pipeline Setup

1. Go to your pipeline and choose the edit button from the top right corner.



2. Change settings to make sure you have your date range set, type of loans you want to see in your pipeline, YOUR USER TYPE (such as LO), and sorted by effective funding date or stage→APPLY.

Edit Filters



The 'Edit Filters' dialog box contains the following sections:

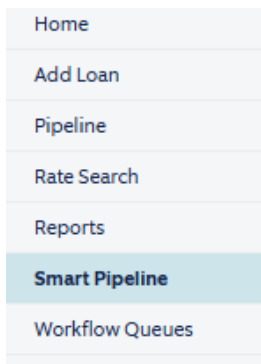
- Effective Funding Date:** Radio buttons for Today, This Month, Next 4 Weeks, Next Month, and Date Range (selected). The Date Range is set to 2/01/2026 through 12/31/2026.
- Lock Status:** Radio buttons for All (selected), Locked, and Unlocked.
- Transaction Status - Select All:** Checkboxes for Active, Borrower App, and Cancelled / Pending (all checked).
- Application Type - Select All:** Checkboxes for Application, Preapproval, and Prequalification (all checked).
- User / Role:** A dropdown menu showing 'Lily Thompson' and 'Loan Officer' (selected).
- Group By:** Radio buttons for Eff. Funding Date (selected) and Stage.

Buttons for 'Cancel' and 'Apply' are located at the bottom right of the dialog.

Note: You will not have to change this every time; only if you want a different view.

Smart Pipeline | Not Seeing Your Loans?

1. Select from left panel at home screen.



2. Select the edit tool from the upper right—make selections and APPLY.

The screenshot shows a software interface with a header bar containing 'eral', 'Performer Needed', and 'Manual Push'. On the right, there is a 'Filter results by...' dropdown menu with 'No filter applied' and a refresh icon. Below the header is a section titled 'Edit View'. It contains two columns: 'Show Me' and 'Group By'. The 'Show Me' column has a dropdown menu with 'Active Pipeline' selected and a star icon. The 'Group By' column has a dropdown menu with 'Effective Funding Date' selected. At the bottom right of the 'Edit View' section are 'Cancel' and 'Apply' buttons.

3. Select refresh on the bottom right if your loans don't automatically populate.

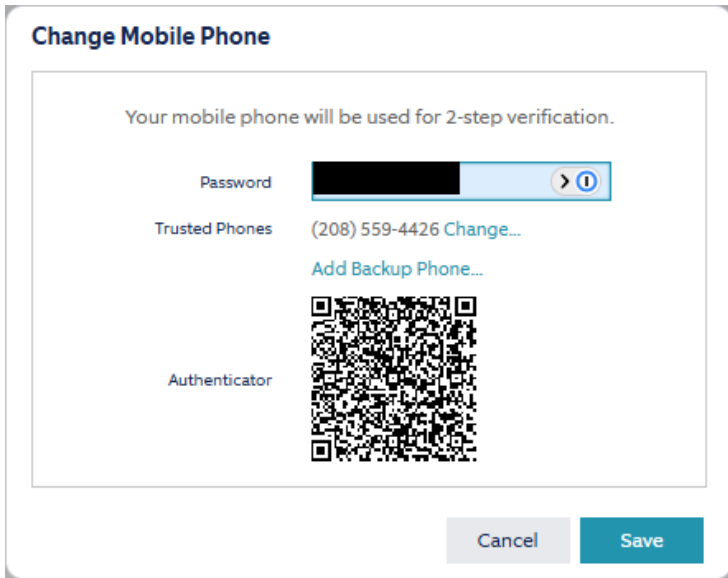
Octane Multi-Factor Bypass

Note: To bypass Octane multi-factor authentication at login (eliminate the need to enter a code each time), you must use a password storage system such as 1Password, LastPass, etc.

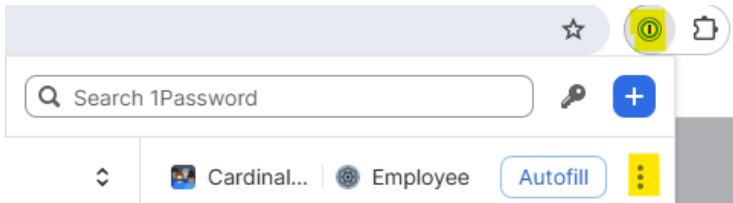
1. In your Octane profile go to General.
2. Bottom right, select Change Mobile Phone.

The screenshot shows a horizontal bar with four buttons: 'Change password', 'Change Challenge Question', 'Change Mobile Phone', and 'Save'. The 'Change Mobile Phone' button is highlighted with a yellow background.

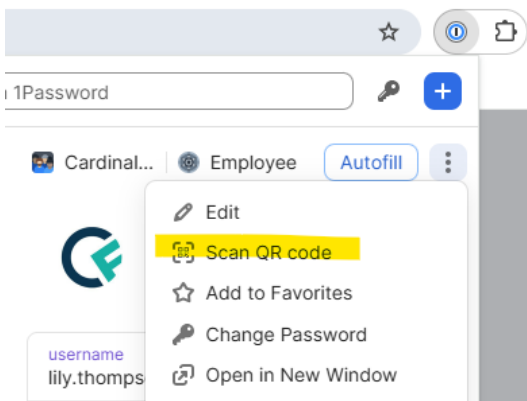
3. Add a trusted phone number if one is not already there.
4. Enter your Octane password from 1Password or other extension.



5. Click on the browser extension of your password storage in the upper right corner of your browser and select the three dots from the drop down menu




6. Choose Scan QR Code from the dropdown menu.



7. You will see: "copied one time password".
8. Sign out of Octane and sign back in.
9. When it prompts you for the passcode you can just select "Sign In" and it will bypass the code requirement*.

Note: *it will show a red error message but it won't effect anything for login.*

There was an error making your request. Refresh your browser and try again. 

2-STEP AUTHORIZATION

A text message with a 2-step verification code was sent to your mobile phone.

Verification Code

478433  

[Resend code](#)

[Sign In](#)

10. Notifications will still come through to your phone number—optionally, you can mute the notifications from that number.