



Creating a Pipeline View – Branch Underwriter

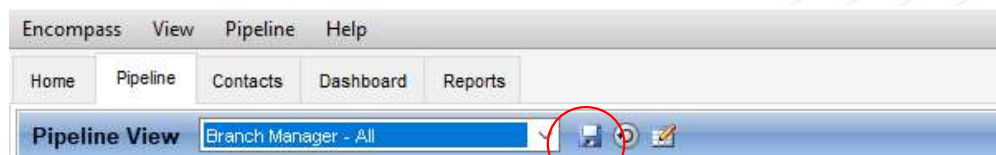


M/I FINANCIAL, LLC
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Creating a Pipeline View – Branch Underwriter

Start by selecting a
pipeline view.

Press the save button.



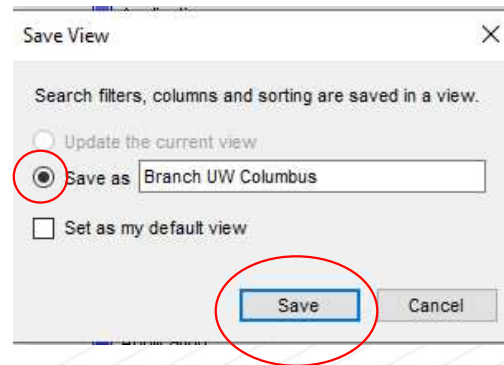
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When you press the save button, the Save View box will open.

Select Save As and rename your pipeline view.

De-select the set as my default view button.

Save your new pipeline view.



Save View

Search filters, columns and sorting are saved in a view.

☐ Update the current view

☒ Save as Branch UW Columbus

☐ Set as my default view

Save Cancel

Clear the **Set as my default view** checkbox if you do not want this view to be the default view that displays when you log in to Encompass and view the tab.

Click **Save**.

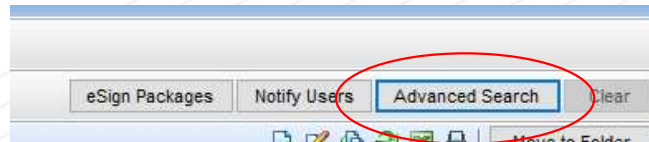
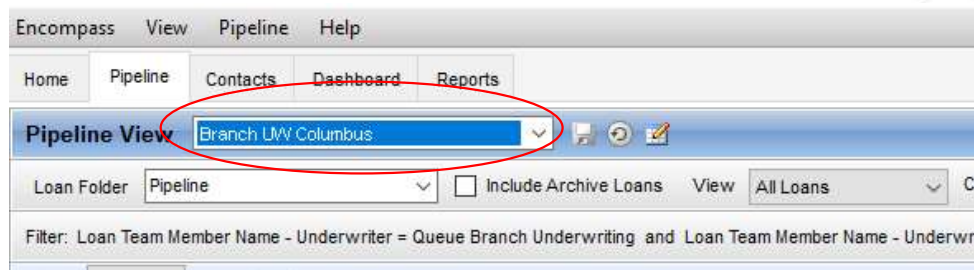


You will not be prompted to save your changes when you log out. If you log out without saving your changes, your data will return to its previous configuration when you log back in.

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In Encompass, select
your new pipeline view
from the drop-down list.

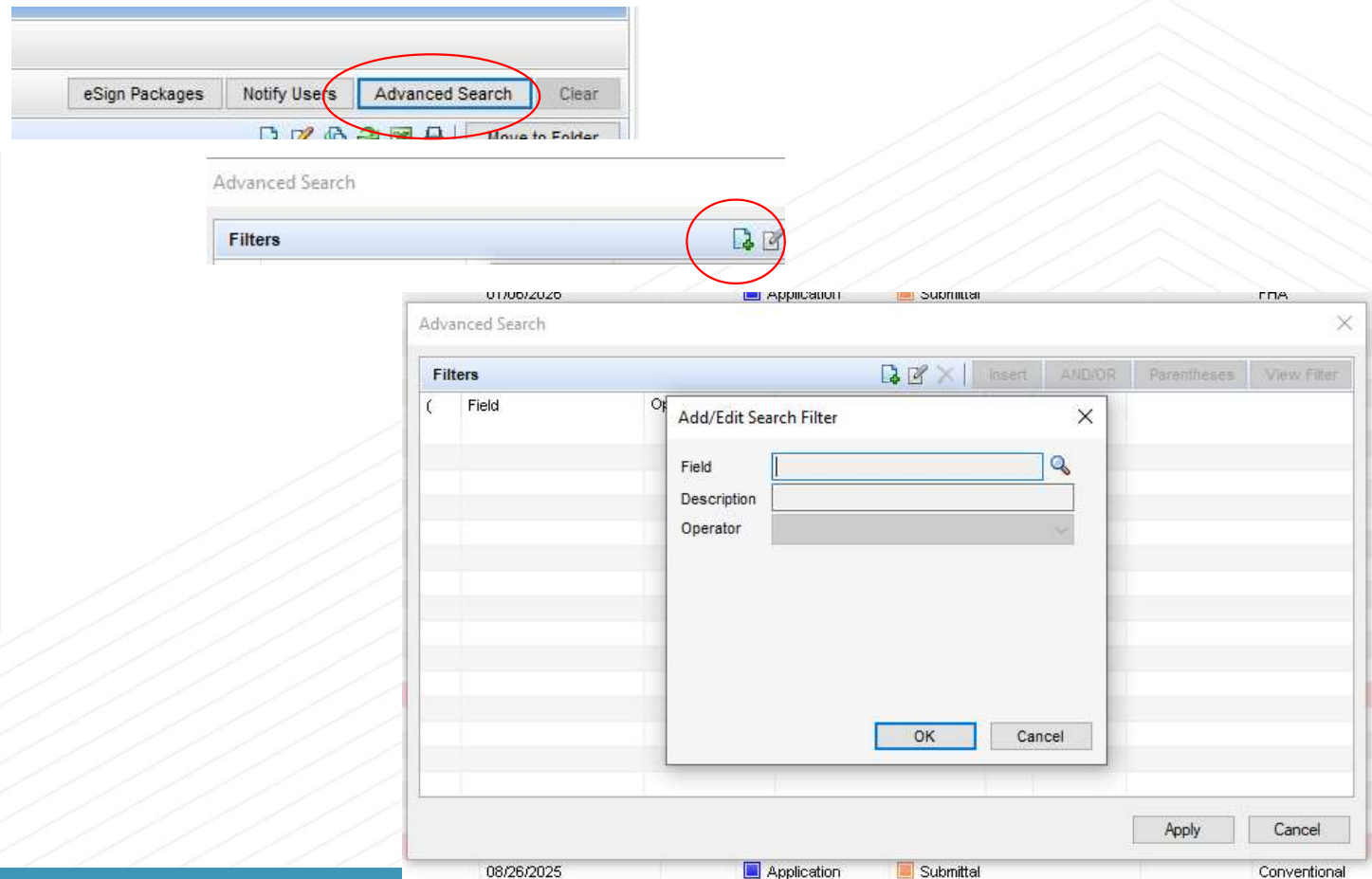
On the far right,
press
the advanced search
button.



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Once Advanced Search is pressed, select the add button.

The Add/Edit Search Filter will open.

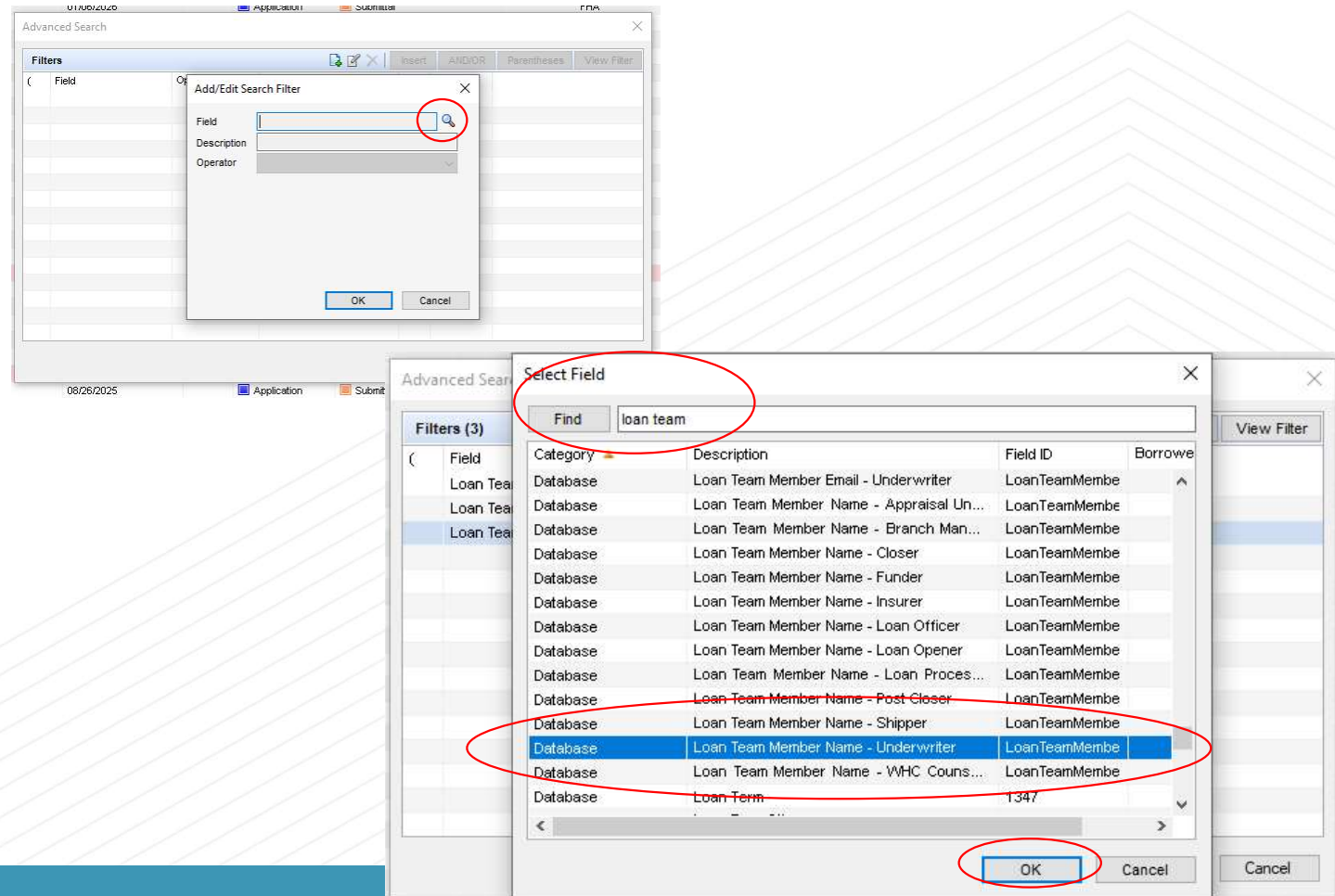


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In the Add/Edit Search Filter, select the Field magnifying glass.

In Find, type Loan Team, press enter.

Scroll down to select Loan Team Member Name – Underwriter and press OK.



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In the Add/Edit Search Filter,
Once the Loan Team
Member Name –
Underwriter is selected, use
the drop down to select:
Is (Exact)
And type the value: Queue
Branch Underwriting

Press OK

The screenshot shows the 'Advanced Search' dialog box. The 'Filters (3)' list on the left contains three entries, all with the operator 'Is'. The 'Add/Edit Search Filter' sub-dialog is open, showing the following fields:

Field	Description	Operator	Value
LoanTeamMember.Name.Underwriter	Loan Team Member Name - Underwriter	Is (Exact)	Queue Branch Underwriting

Buttons for 'OK' and 'Cancel' are at the bottom of the sub-dialog. The main dialog has 'Apply' and 'Cancel' buttons at the bottom right.

The screenshot shows the 'Advanced Search' dialog box after the filter has been added. The 'Filters (1)' list now contains one entry:

Field	Operator	Value
Loan Team Member Em	Is	Queue Branch Underwriting

The 'Joint' column is also visible. Buttons for 'Insert', 'AND/OR', 'Parentheses', and 'View Filter' are at the top right. 'Apply' and 'Cancel' buttons are at the bottom right.

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Continue to press the
add filter button

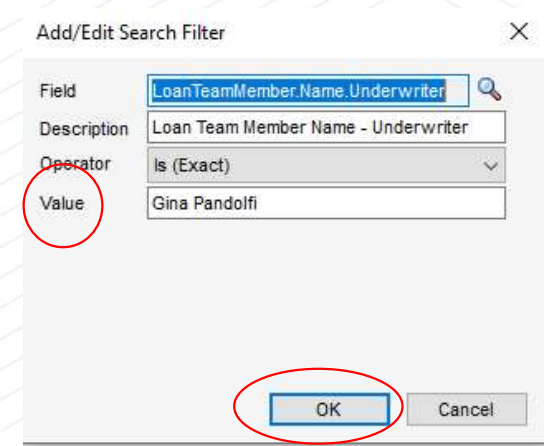
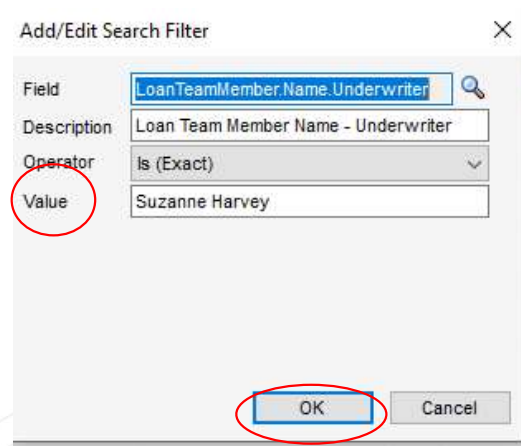
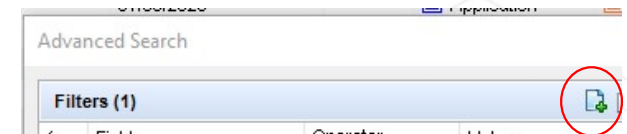
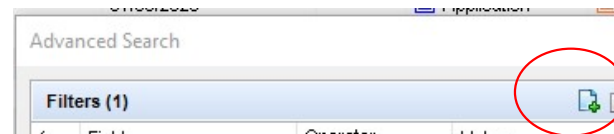


to add each of your
underwriters.
The Field will still be
Loan Team Member
Name – Underwriter

Operator dropdown to
Is (Exact)

Type their names into
the Value area.

Press OK



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Once you have completed entering your underwriters, you will need to select/highlight the second line and press the AND/OR button. The second line will need to reflect OR.

Press Apply

The screenshot shows the 'Advanced Search' dialog box. It contains a table with the following data:

(	Field	Operator	Value	)	Joint
	Loan Team Member Na	Is	Queue Branch Underwriting		and
	Loan Team Member Na	Is	Suzanne Harvey		or
	Loan Team Member Na	Is	Gina Pandolfi		

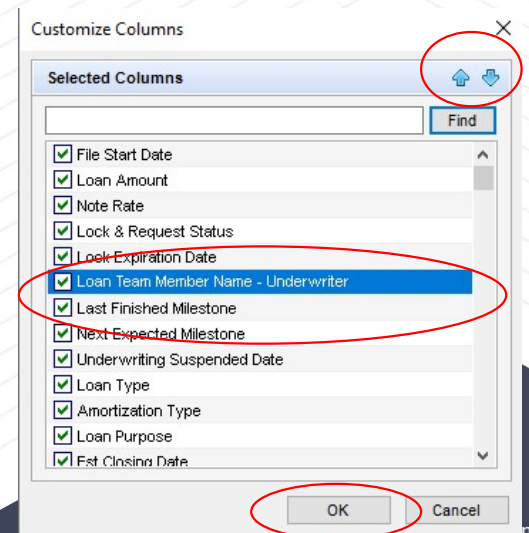
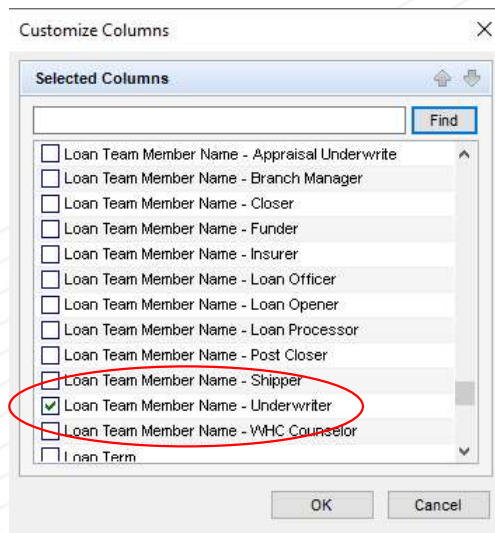
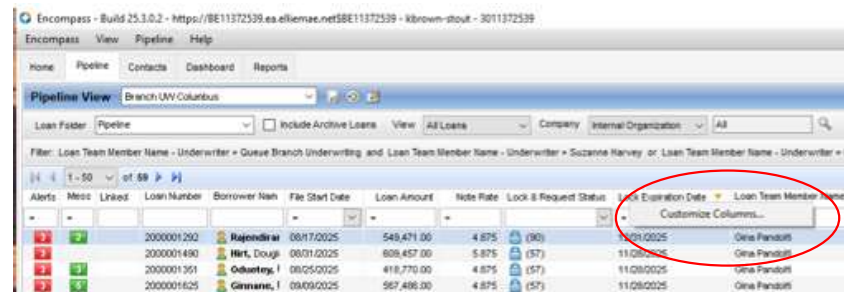
The 'AND/OR' button in the top right corner is circled. The second row of the table is highlighted. The 'Apply' button at the bottom right is also circled.

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From the pipeline view you just created, right click on any of the columns to create a customize column.

In Custom Columns, select Loan Team Member Name – Underwriter. Use the up and down arrows to move the column to where in the pipeline you would like this column to be placed.

Press OK



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You now have your newly created pipeline view with the underwriter designated.

Pipeline View

Branch UW Columbus

Loan Folder

Pipeline

☐ Include Archive Loans

View

All Loans

Company

Internal Organization

All

Global Search

☐ On

☒ Off

Filter: Loan Team Member Name - Underwriter = Queue Branch Underwriting and Loan Team Member Name - Underwriter = Suzanne Harvey or Loan Team Member Name - Underwriter = Gina Pandolfi

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Alerts	Mess	Linked	Loan Number	Borrower Nam	File Start Date	Loan Amount	Note Rate	Lock & Request Status	Lock Expiration Date	Loan Team Member Name - Underwriter	Last Finished Milest
=	=				=	=	=		=		
3	2		2000001292	Rajendirar	08/17/2025	549,471.00	4.875	(90)	12/31/2025	Gina Pandolfi	Cond. Approval
3			2000001490	Hirt, Doug	08/31/2025	609,457.00	5.875	(57)	11/28/2025	Gina Pandolfi	Cond. Approval
3	3		2000001351	Oduetey, F	08/25/2025	418,770.00	4.875	(57)	11/28/2025	Gina Pandolfi	Cond. Approval
3	6		2000001625	Ginnane, E	09/09/2025	567,486.00	4.875	(57)	11/28/2025	Gina Pandolfi	Cond. Approval
4	4		2000001567	Melcher, E	09/06/2025	513,970.00	4.875	(57)	11/28/2025	Gina Pandolfi	Cond. Approval
3	6		2000001723	Uanino, R	09/15/2025	499,833.00	4.875	(57)	11/28/2025	Gina Pandolfi	Cond. Approval
3	2		2000001697	Lammlein,	09/14/2025	547,510.00	4.875	(57)	11/28/2025	Gina Pandolfi	Cond. Approval
6	6		2000001144	Schirtzing	07/29/2025	525,650.00	5.875	(29)	10/31/2025	Gina Pandolfi	Cond. Approval
4	2		2000001146	Meyung, M	07/29/2025	419,768.00	5.875	(29)	10/31/2025	Gina Pandolfi	Cond. Approval
2	2		2000001165	Hunt, Greg	08/01/2025	320,390.00	4.875	(29)	10/31/2025	Gina Pandolfi	Cond. Approval
5	4		2000001191	Halley, Rol	08/04/2025	134,216.00	5.875	(19)	10/21/2025	Gina Pandolfi	Cond. Approval
1	6		2000001122	Alba, Errol	07/27/2025	547,000.00	4.875		09/30/2025	Gina Pandolfi	Post Closing
2	2		2000001152	Ghabayen	07/31/2025	437,415.00	4.875		09/30/2025	Gina Pandolfi	Post Closing
1	1		2000001064	Parfitt, Mai	07/19/2025	356,290.00	5.875		08/29/2025	Gina Pandolfi	Purchasing
7	4		2000001030	Pierce, Me	07/16/2025	457,296.00	6.000			Gina Pandolfi	Cond. Approval
4	4		2000001163	Sprowl, S	08/01/2025	530,544.00	6.625			Gina Pandolfi	Cond. Approval
2	2		2000001211	Hunter Jr,	08/07/2025	580,000.00	6.375			Gina Pandolfi	Cond. Approval
3	4		2000001521	Turos, Kier	09/02/2025	475,211.00	6.250			Gina Pandolfi	Cond. Approval



M/I TITLE AGENCY



M/I TITLE, LLC



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TransOhio Residential Title



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