



Pipeline Customization



M/I FINANCIAL, LLC
A Subsidiary of M/I Homes, Inc.

Pipeline Customization

When viewing loans on the Pipeline tab, documents and conditions in the eFolder, contacts on the Contacts tab, or trades and contracts on the Trades tab, you can control the information that is displayed and how it is displayed. You can then save the configuration as a new view and apply the criteria to the data at any time.

Pipeline View

Branch Manager - All

Loan Mailbox

Loan Folder

Pipeline

☐ Include Archive Loans

View

All Loans

Company

Internal Organization

All

Global Search

☐ On

☒ Off

?

Filter: None

eSign Packages

Notify Users

Advanced Search

Clear

1 - 50

of 299

Move to Folder

Alerts	Mess	Linked	Loan Number	Borrower Nam	Application Dat	Loan Amount	Note Rate	Lock & Request Status	Lock Expiration Date	TPO Un	Last Finished Milest	Next Expected Milestone	Underwriting	Loan Type	Amortization Typ	Loan Purpose	Est Closing Date	Closing Date	Subject Property Address	Subject
=	=				=	=	=										=			
6	4		000100193	Motion, Lc	01/14/2025	600,000.00	7.250	(254)	01/21/2026		Ready for Docs	Docs Out		Conventional	Fixed Rate	Purchase	02/12/2025		123 My Way	Nashv
7			000100422	Davis, Ext	03/12/2025	366,000.00	7.625	(239)	01/06/2026		Application	Submittal		FHA	Fixed Rate	Purchase	05/15/2025		TBD	Cypres
7			000100083	Davis, NC	11/20/2024	600,000.00	6.750	(222)	12/20/2025		Application	Submittal		Conventional	Fixed Rate	Purchase	12/11/2024	12/11/2024		Colum
3	1		000100343	Davis, Illnc	02/25/2025	253,592.00	7.000	(103)	08/23/2025		Application	Submittal		Conventional	Fixed Rate	Purchase	05/09/2025	05/09/2025	943 Meadow Ln	Mareng
7			000100146	Gage, Ann	12/26/2024	360,000.00	7.000	(70)	07/21/2025		Application	Submittal		Conventional	ARM	Purchase	05/16/2025	05/16/2025	123 Prop St	Monte
2			000100538	House, VV	04/07/2025	278,000.00	6.625	(58)	07/09/2025		Application	Submittal		VA	Fixed Rate	Purchase	06/20/2025		20219 Oriana Loop	Charlo
6	2		000100539	Shannon,	04/07/2025	278,000.00	6.875	(58)	07/09/2025		Funding	Post Closing		FHA	Fixed Rate	Purchase	04/28/2025	04/28/2025	20219 Oriana Loop	Charlo

Pipeline View – Add or Remove Columns

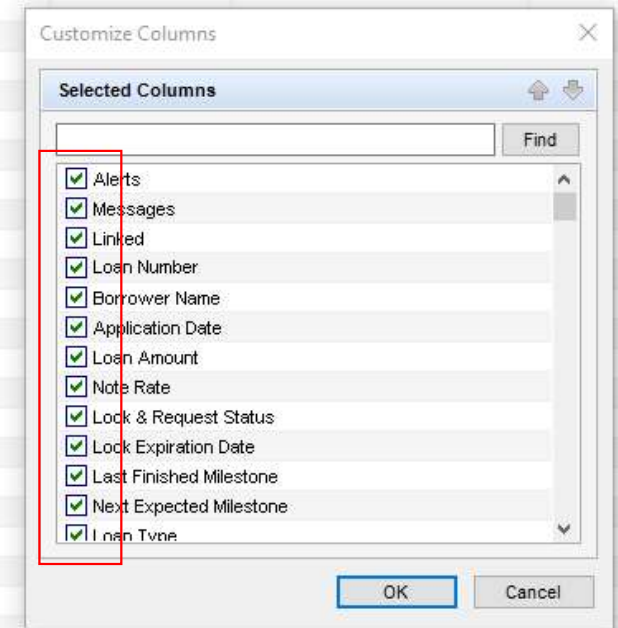
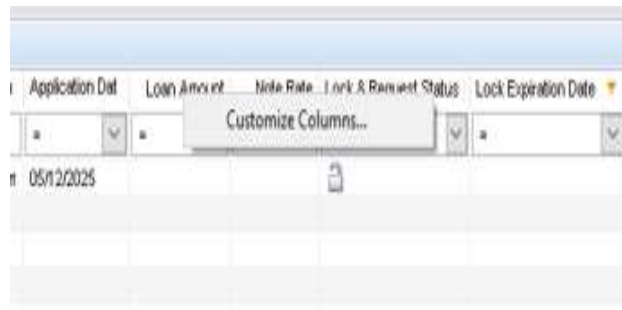
To Add or Remove Columns:

1. Right-click a column header, and then click **Customize Columns**.

2. To remove a column, clear the corresponding checkbox.

3. To add a column, select the corresponding checkbox.

4. Click **OK**.



Pipeline View – Change the Column Order

Click and then drag a column to the desired location.

-OR-

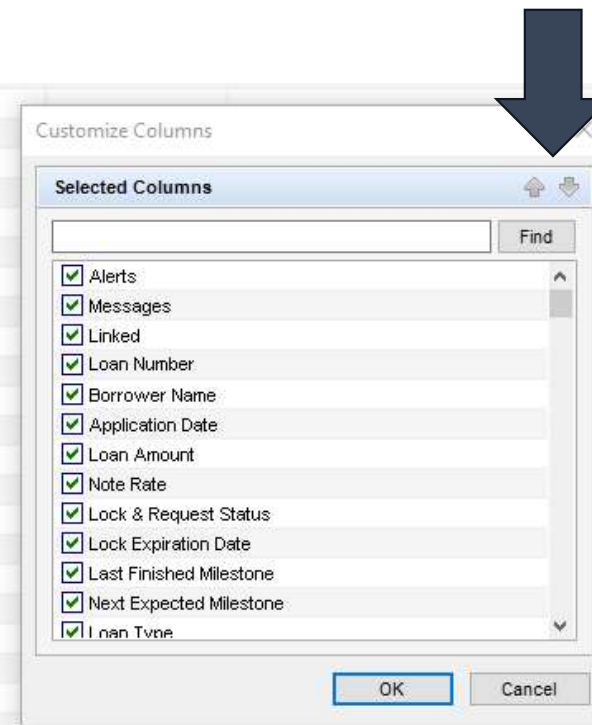
1. Right-click a column header, and then click **Customize Columns**.

2. On the Customize Columns window, select a column name in the list.

3. Click the **up arrow** or **down arrow** in the upper-right corner to move the column up or down in the list.

4. The column at the top of the list displays on the far left of the table. The remaining columns display from left to right according to their list order.

4. Click **OK**.



Sorting Pipeline Data

Sorting the data

1. Click a column header to display data in ascending order based on the information in the column.

2. Alternately click the header to sort the data in descending or ascending order.

3.Example: On the Pipeline, click the Loan Amount column to display loans with the lowest amounts at the top of the Pipeline and loans with the highest amounts at the bottom. Click the header again to display the highest amounts at the top.


4. You can sort loans based on two levels of loan data. For example, on the Pipeline you can sort loans based on the loan amount and the last finished milestone. First, click the **Loan Amount** column header to sort by ascending loan amount. Then, click the **Last Finished Milestone** column header. The loans are sorted by last finished milestone, and the loans within each milestone group are sorted in ascending order by loan amount.

Borrower Name	Application Dat	Loan Amount	Note Rate	Lock & Request Status	Lock Expiration Date	TPO Un	Last Finished Mil
BUILDER, SUZI	05/13/2025	400,000.00	7.375				Started
Firsttimer, Alice	05/27/2025	245,000.00	7.000	(56)	07/28/2025		Submittal
Firsttimer, Alice	05/20/2025	425,000.00	7.250				Submittal
America, Andy	05/19/2025	467,500.00	7.000				Submittal
Firsttimer, Alice	05/20/2025	300,000.00	7.000	(56)	07/28/2025		Cond. Approval
Firsttimer, Alice	05/20/2025	360,000.00	7.500	(86)	08/27/2025		Cond. Approval
Motion, Loco	05/20/2025	405,000.00	6.750	(25)	06/27/2025		Cond. Approval
Firsttimer, Alice	05/02/2025	425,000.00	7.500	(56)	07/28/2025		Cond. Approval
AMERICA, ANDY	05/15/2025	427,500.00	6.875				Cond. Approval
Motion, Loco	05/20/2025	427,500.00	7.125	(56)	07/28/2025		Cond. Approval
Loanseeker, Homer	05/20/2025	455,000.00	6.750	(25)	06/27/2025		Cond. Approval
Motion, Loco	05/20/2025	475,000.00	6.875	(21)	06/23/2025		Cond. Approval
Motion, Loco	05/20/2025	482,500.00	6.375	(28)	06/30/2025		Cond. Approval
America, Andy	04/21/2025	500,000.00	6.500	(24)	06/26/2025		Cond. Approval
Loanseeker, Homer	05/02/2025	500,000.00	6.875	(56)	07/28/2025		Cond. Approval
Homeowner, John	05/07/2025	589,500.00	7.125	(42)	07/14/2025		Cond. Approval

Pipeline View – Save Your Changes

Save the View

After changing the columns, sorting the data, applying search criteria, or selecting All Loans or My Loans (where applicable), you can save the new configuration as a new custom view. After you save a view, you can select it at any time to apply the criteria to your loan, documents, conditions, or contact data.

1. After you have set up the data to your specifications, click the **Save** icon. 
2. Select **Save as**.



The **Update the current view** option is available only for custom views. You cannot save or update a standard view.

3. Type the name of the view.
4. 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.
5. 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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M/I TITLE, LLC



M/I FINANCIAL, LLC
A Subsidiary of M/I Homes, Inc.



TransOhio Residential Title



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