

JANUARY 11TH 2023

Release Notes

Version 1.1.7.24554

POWERED BY
SCARLETT
TECHNOLOGY FOR BROKERS AND LENDERS



We are happy to inform you that **version 1.1.7.24554** of Scarlett Mortgage includes the following additional modules, features and enhancements:

1. New Leads Management Module

2. Enhancements to Online Mortgage Application & Customer Journey

3. Enhancements to Deals Module

4. New Notification Types

5. New and Enhanced Integrations

New Leads Management Module

The new and long-awaited Leads Management module is now live. With this new and exciting module you are now able to:

NEW LEADS MANAGEMENT MODULE

Capture new and existing opportunities prior to application stage

The screenshot displays the 'New Leads Management Module' interface. On the left, a sidebar contains icons for user management, documents, calendar, settings, tools, and analytics. The main area features a '+ New Lead' button and a table of leads. The table has columns for checkboxes and names: First Name, Donald, Mini, Charlie, and Mickey. An orange arrow points from the '+ New Lead' button to the 'First Name' column header. Another orange arrow points from the 'Donald' row to the 'First Name' column header. To the right, a 'Create Lead' form is shown with fields for Lead Source (Website), First Name (Snow), Last Name (White), Email Address (snow.white@scarlettnetwork.com), Mobile Phone ((416) 111-2222), Description, Status (Open), and Lead Owner. The form includes 'Cancel' and 'Save' buttons. Below the main interface, a detailed view of a lead named 'Donald Duck' is shown, including a 'Lead Information' section with fields for Lead Group, Lead Source (Referral), and Status (Lost). The right side of this view shows a 'Notes' section with a note from Joe Tribiani dated Dec 30, 2022 4:00 PM, stating 'I met Donald Duck at the Disney World where he had expressed an interest in applying for a mortgage.' The interface also includes a 'Recent Updates' tab and a 'Create Note' button.

NEW LEADS MANAGEMENT MODULE

Track your lead conversions

+ New Lead	Pipeline(s) Name / Phone / Email Q ⚙ Y							
☐	First Name	Last Name	Lead Source	Status	Classification	Citizenship	SIN	Date
☐	Donald	Duck	Referral	Lost	Hot			
☐	Mini	Mouse	Conference	Closed	Cold			
☐	Charlie	Brown	Website	Open	Unknown			
☐	Mickey	Mouse	Website	Open	Warm			

Leads / Opportunities

Actions

Donald Duck

+ New Tag

Lead Information

Lead Group

Lead Source

Referral

Status

Lost

Classification

Hot

Referred By

Recent Updates

Notes

Documents

Emails

SMS

Activities

Pipelines

Deals

Connect to Deal

Convert

Deal(s)

Deal #

Property Address

Application Date

Closing Date

Mortgage Amount

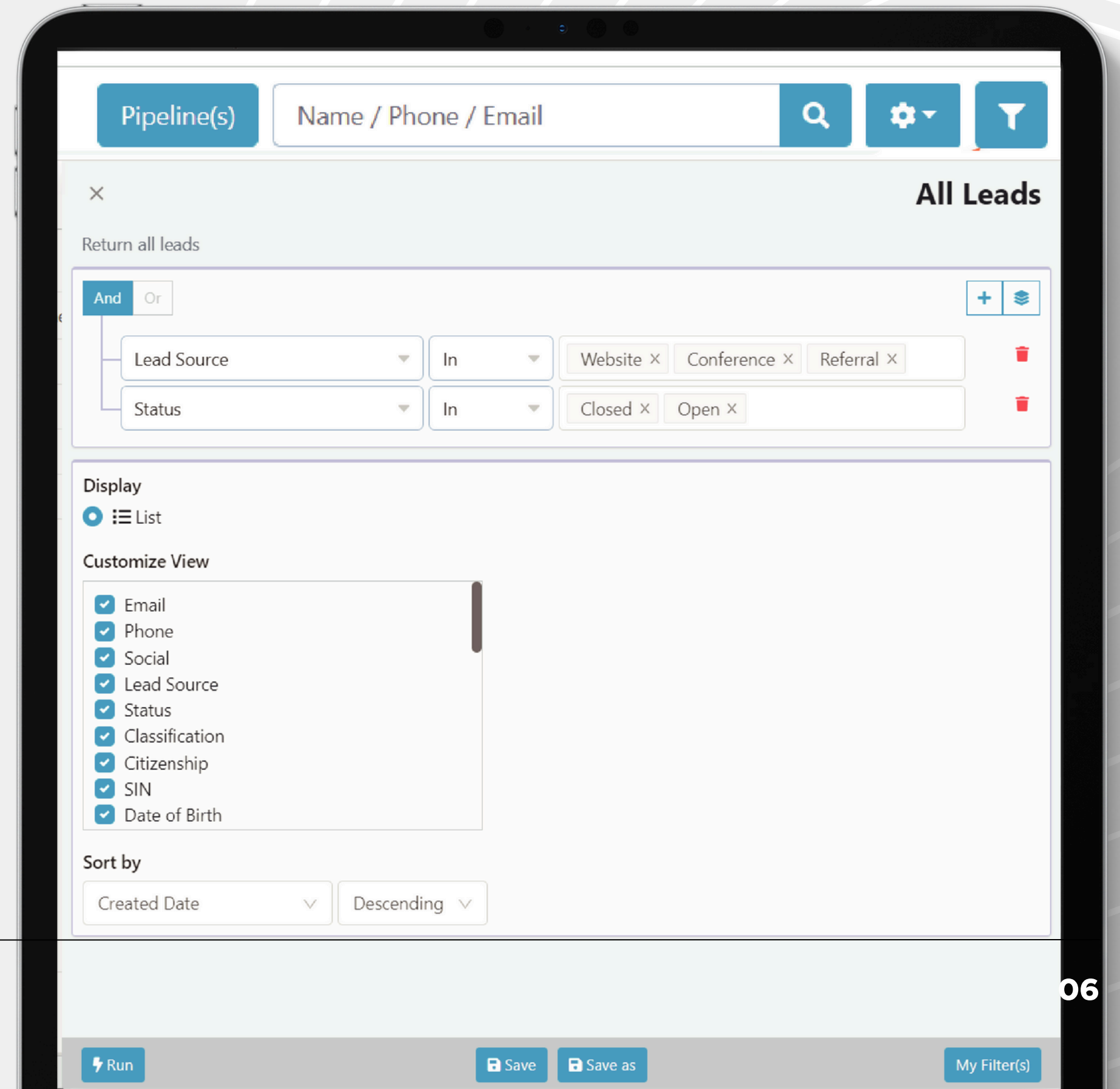
Maturity Date

Disconnect

[RETURN TO HOME](#)

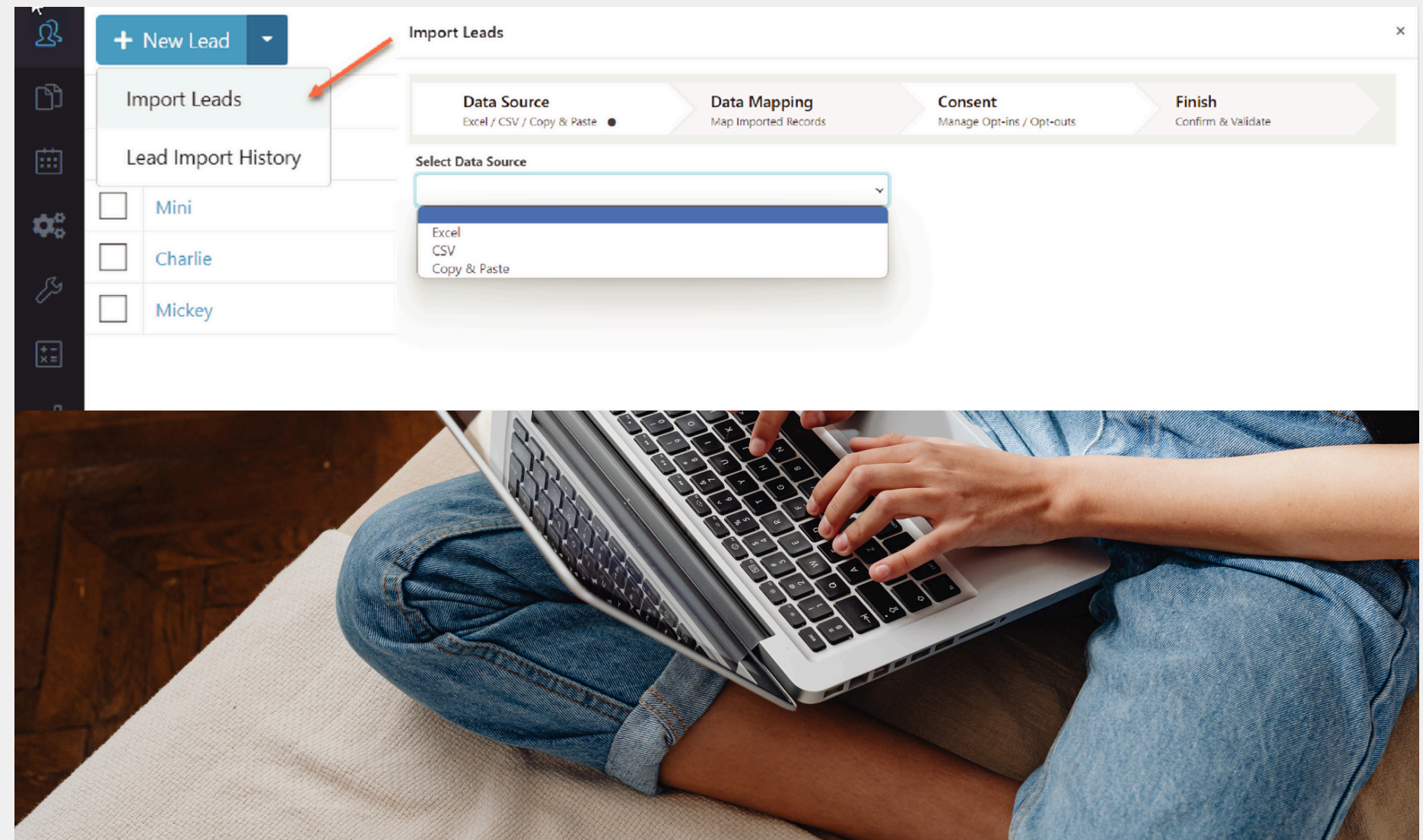
NEW LEADS MANAGEMENT MODULE

Filter and mine your leads



NEW LEADS MANAGEMENT MODULE

Import leads from other sources



Joe Tribiani

Pipeline(s)

Name / Phone / Email

Q

⚙

⌵

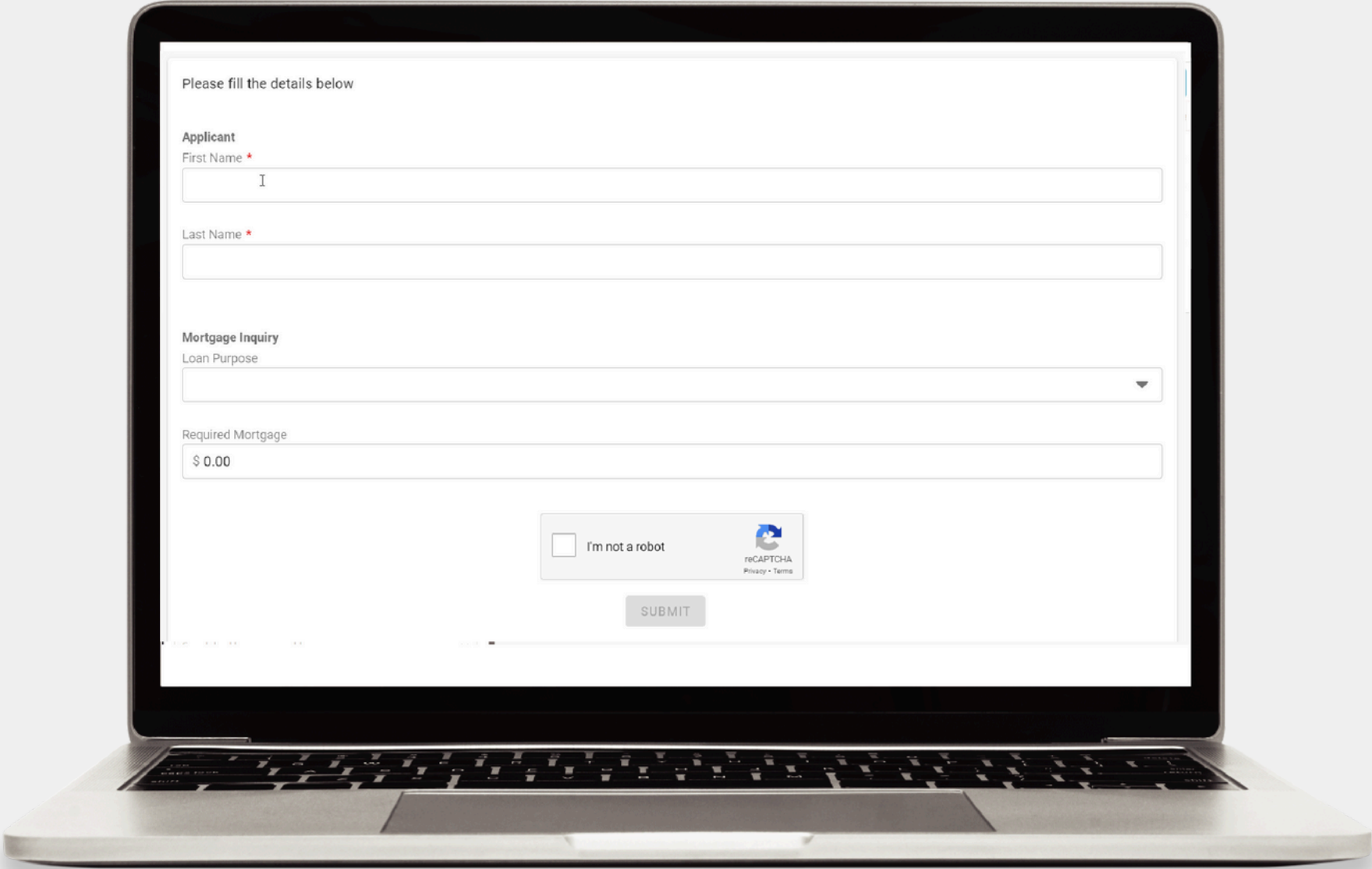
Lead Source	Status	Custom Fields
Referral	Lost	Embedded Form
Conference	Closed	
Website	Open	
Website	Open	

Embedded Forms

Form Name	Number of columns
Website Lead Capture Form	1

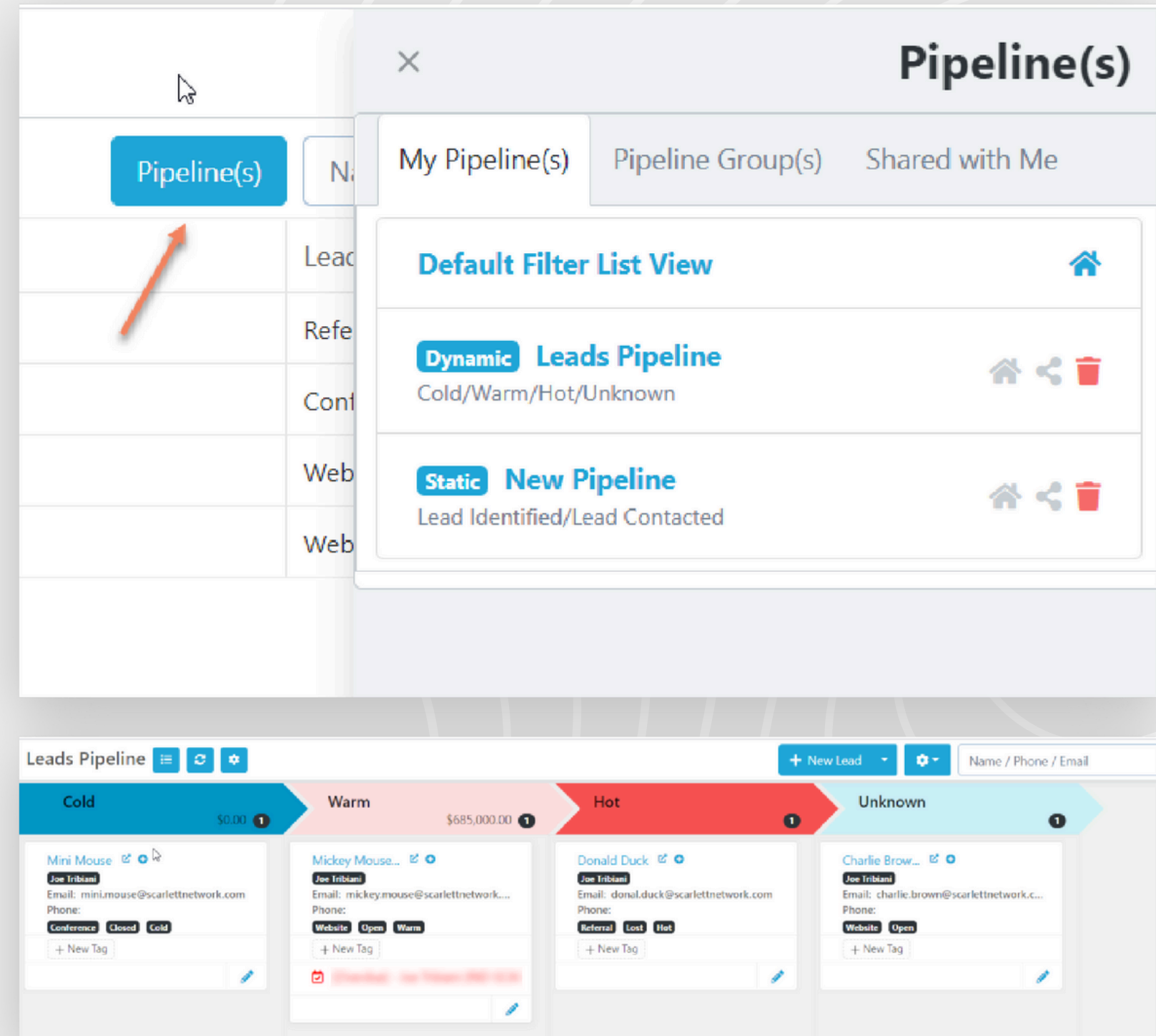
NEW LEADS MANAGEMENT MODULE

Build custom html lead forms and deploy to any website



NEW LEADS MANAGEMENT MODULE

Manage your leads funnel from start to finish



NEW LEADS MANAGEMENT MODULE

Create and configure your custom fields

+ New Lead

⚙️

Name / Phone / Email

1

Unkno

1

Charlie Brow...

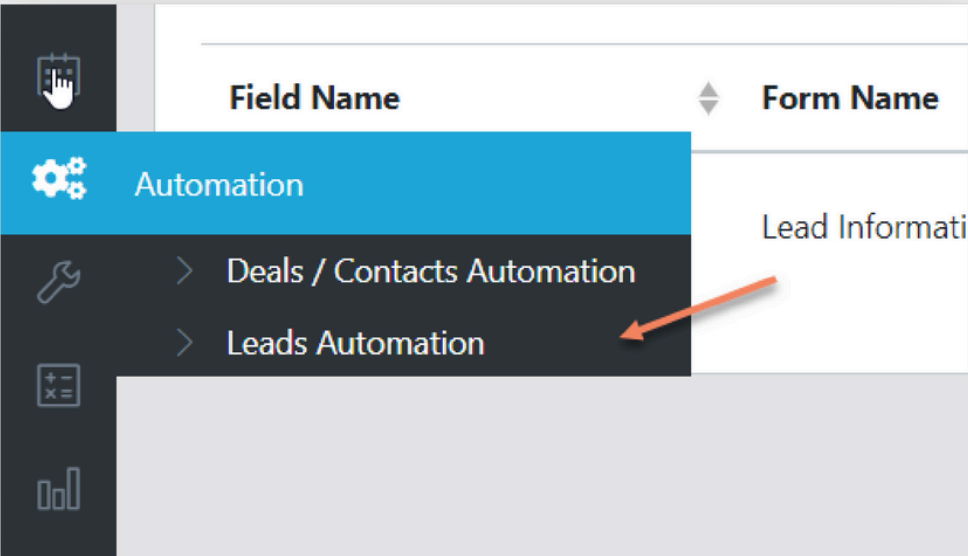
Joe Tribiani

Fields

Field Name	Form Name	Field Type
Custom Field	Lead Information	Single Line Text

NEW LEADS MANAGEMENT MODULE

Automate your leads email and SMS communication



Leads Automation & Workflows	
<< < 1 > >> 20 ▾	
Name	Next Run Date
Happy Birthday (Leads) Send primary applicant a happy birthday email and also creates a task in calendar as a reminder.	Recurrent: Daily, repeat every 1 day(s) at 08:00 AM
Happy New Year (Leads) Send Happy New Year wishes to all lead applicants.	Recurrent: Yearly, repeat every 1 year(s) on January 1

NEW LEADS MANAGEMENT MODULE

Centrally manage your leads communication consent



You have total **4** leads.

- 4** out of **4** leads have opted in for email communication.
- 0** out of **4** leads are opted out for email communication.
- 0** out of **4** leads have not provided consent for email communication.

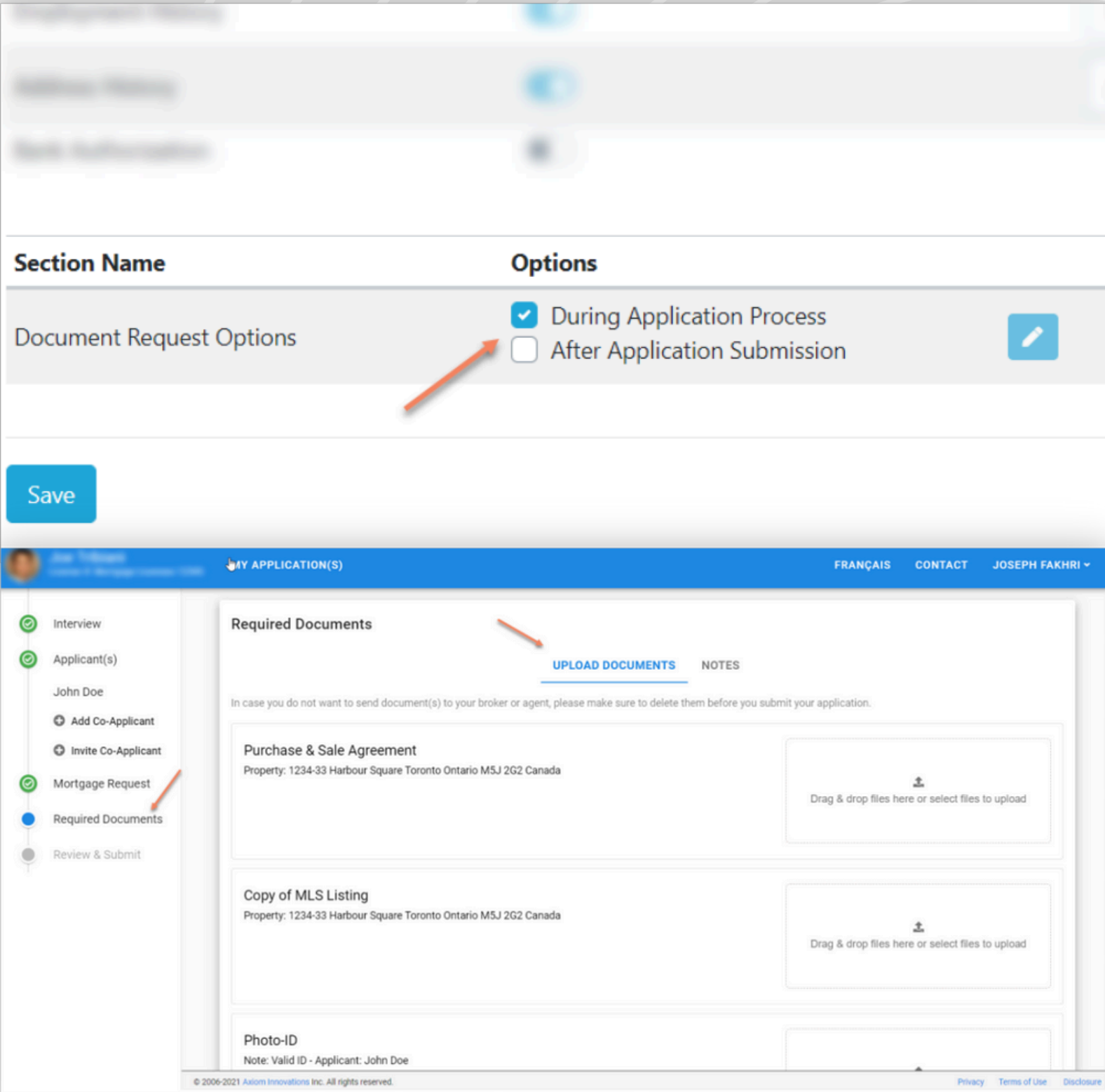
[Opt-in all leads that have not provided consent yet](#) [Search](#)

Enhancements to Online Mortgage Application & Customer Journey

A number of features were added the online mortgage application. Those features are:

ENHANCEMENTS TO ONLINE MORTGAGE APPLICATION & CUSTOMER JOURNEY

Ability for applicants to upload required documents as part of the application process



ENHANCEMENTS TO ONLINE MORTGAGE APPLICATION & CUSTOMER JOURNEY

Ability for applicants to provide authorization to download their bank statements as part of the application process

Section Name	Show	Required	Not Required	Min Required
Home	☒	☐	☒	
Property Details	☒			
Bank	☒	☒	☐	
Income	☒	☐	☒	
Additional Assets (Additional Bank)	☒			
Employment History	☒			
Other Assets	☒			
Bank Authorization	☒			

MY APPLICATION(S)

☒ Interview

☒ Applicant(s)
John Doe

+ Add Co-Applicant

+ Invite Co-Applicant

☒ Mortgage Request

☒ Bank Statements

☐ Review & Submit

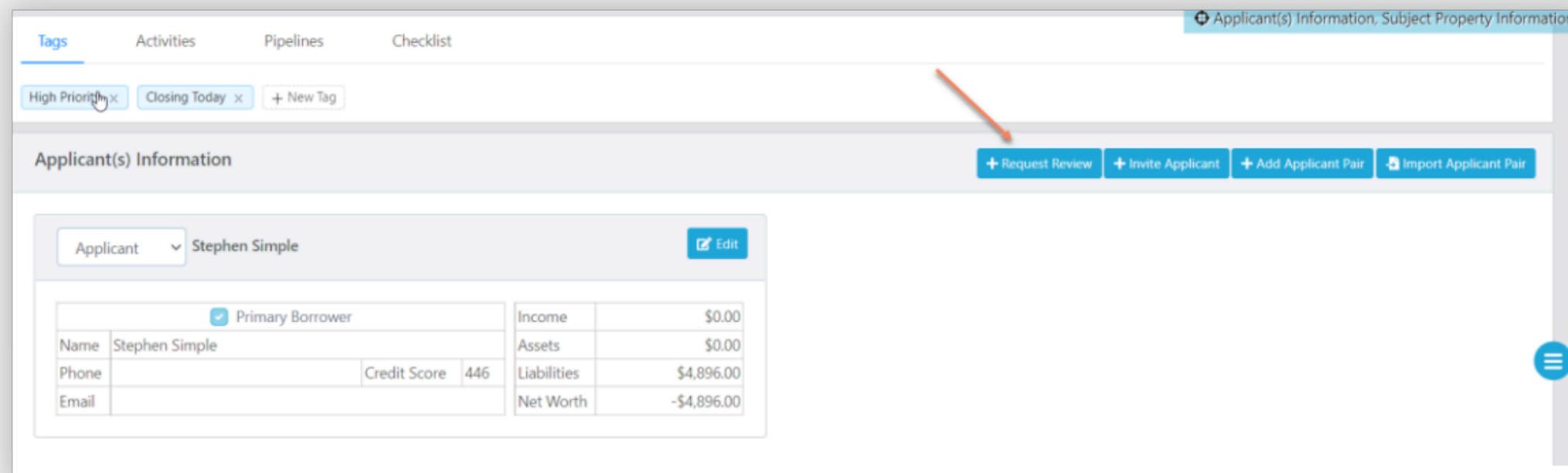
Bank Statements

Click the Authorize button below to provide your broker with copies of your latest bank statements.
Please note you can authorize a maximum of 3 requests per applicant.

AUTHORIZE

ENHANCEMENTS TO ONLINE MORTGAGE APPLICATION & CUSTOMER JOURNEY

Ability for applicants to review their pre-populated mortgage application and make the necessary edits instead of starting an application from scratch. This feature is most useful for your repeat clients.



The screenshot displays the 'Applicant(s) Information' section of a mortgage application system. At the top, there are tabs for 'Tags', 'Activities', 'Pipelines', and 'Checklist'. Below these, there are tags for 'High Priority' and 'Closing Today', along with a '+ New Tag' button. The main section is titled 'Applicant(s) Information' and contains a dropdown menu for 'Applicant' with 'Stephen Simple' selected, and an 'Edit' button. Below this, there is a table with the following data:

Primary Borrower	
Name	Stephen Simple
Phone	
Email	
Credit Score	446
Income	\$0.00
Assets	\$0.00
Liabilities	\$4,896.00
Net Worth	-\$4,896.00

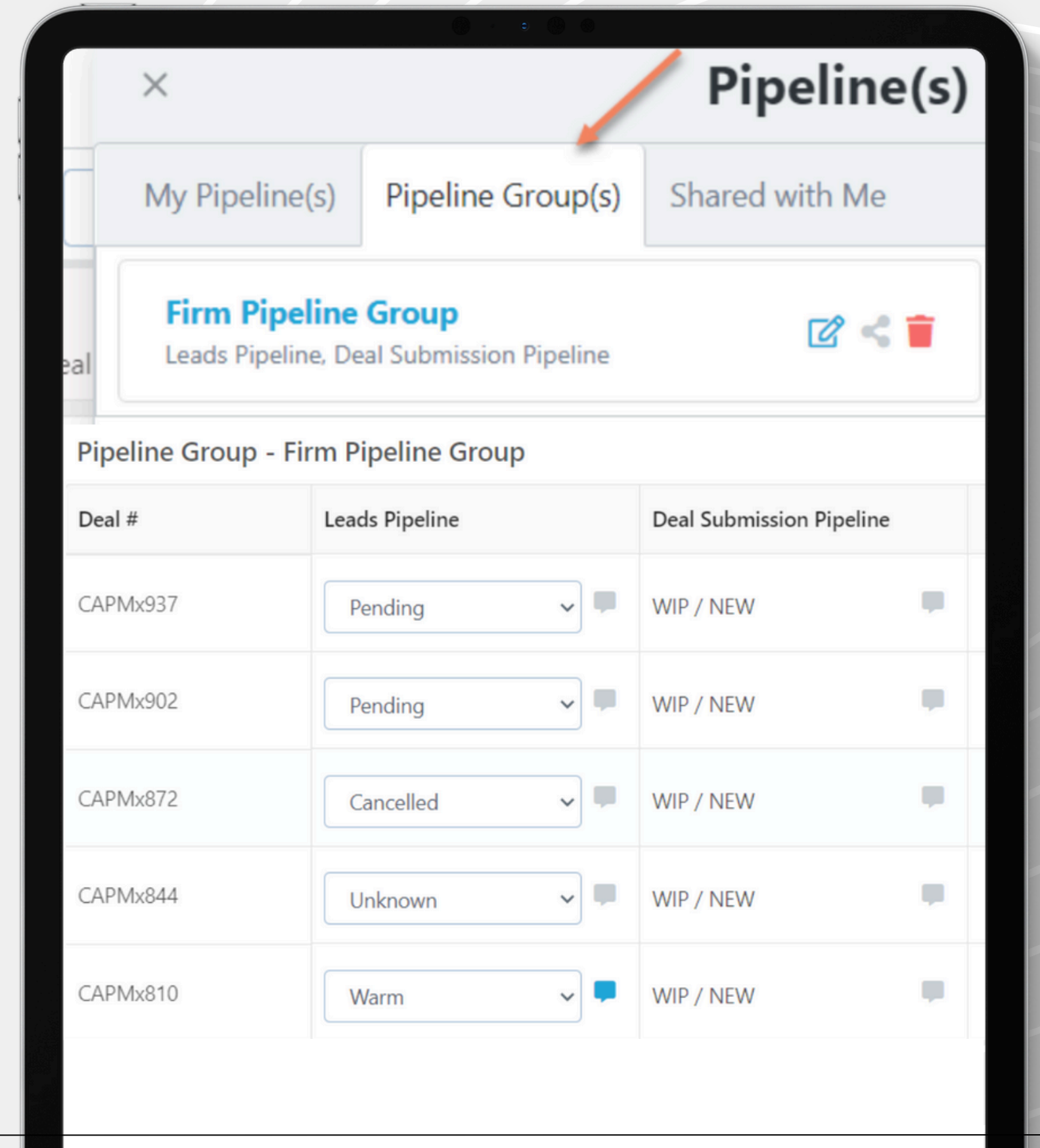
On the right side of the 'Applicant(s) Information' section, there are four buttons: '+ Request Review', '+ Invite Applicant', '+ Add Applicant Pair', and '+ Import Applicant Pair'. A red arrow points to the '+ Request Review' button.



Enhancements to Deals Module

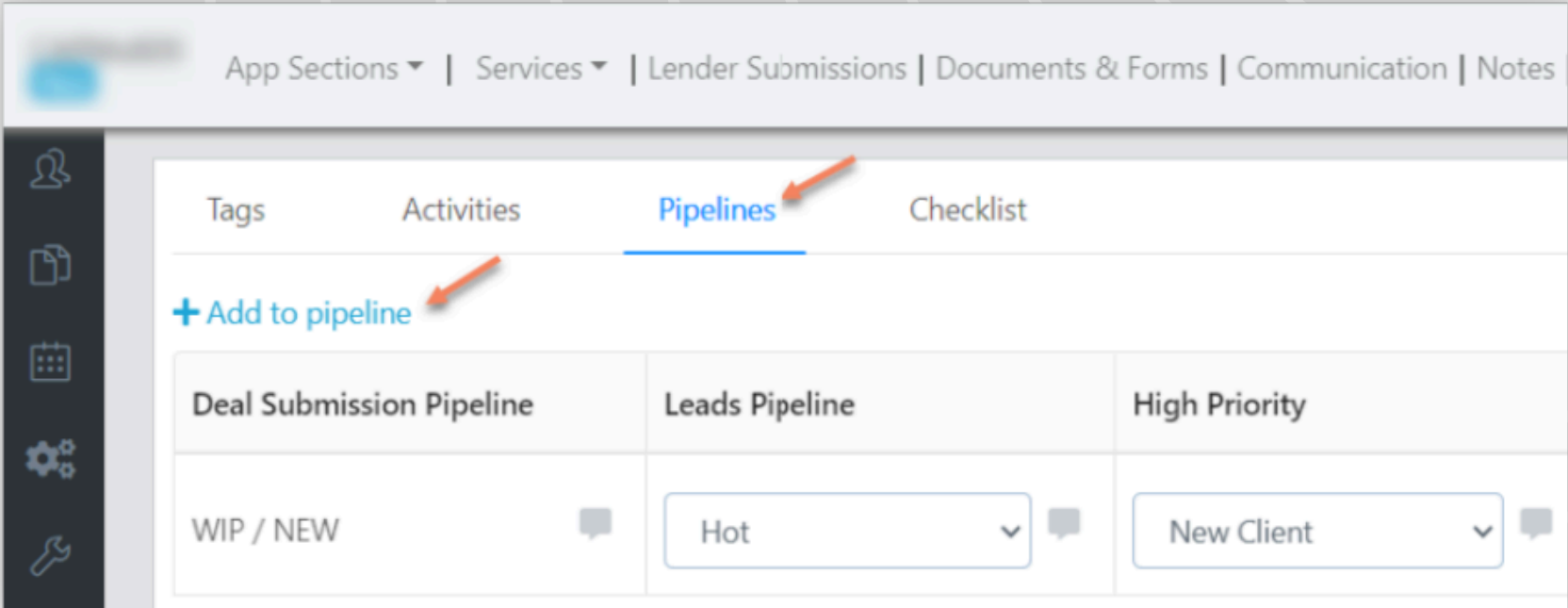
ENHANCEMENTS TO DEALS MODULE

Ability to view a summary of all your deals and each of their respective pipelines. This new feature is known as Pipeline Group



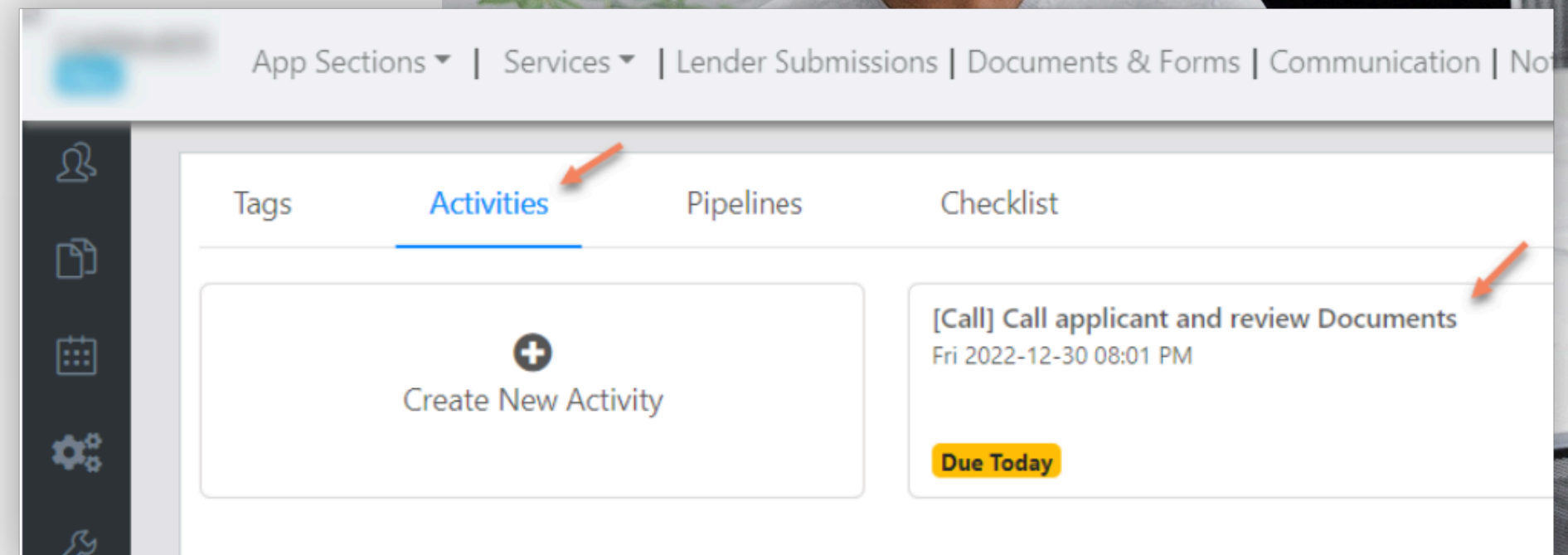
ENHANCEMENTS TO DEALS MODULE

Ability to view, add and edit a deal to any configured pipeline directly form deal page



ENHANCEMENTS TO DEALS MODULE

Ability to add and manage deal activities directly from deal page versus the Activities section



ENHANCEMENTS TO DEALS MODULE

Ability to create and manage deal checklist(s) directly from deal page

CAPMx600
Submitted

App Sections | Services | Lender Submissions | Documents & Forms | Communication | Notes | History

Validate Save Close

Tags Activities Pipelines Checklist

+ Modify Checklist

Select All Delete

	Pre-Approvals	Status	Assign To	Due Date	Note	
☐	Call and review with client upon submission	Select Option	Select Agent			
☐	Review eligible list of lenders	Select Option	Select Agent			

ENHANCEMENTS TO DEALS MODULE

Ability to enter negative income under Employment History

Employment History

Applicant 1 - Employment History 1

Employer Name

Status

Type

Phone

Ext

Fax

Address Lookup

Unit #

Street #

Street Name

City

Province

Job Title

Occupation

Industry Sector

Income Type

Time in Industry

Income Period

Income Amount

Current

Full Time

(111) 111-1111

Start typing your address...

North York

Ontario

☐ Self Employed

Director of Client Sevices

Management

Banking/Finance

Salary

10 y 0 m

Annual

\$ -10,000.00

[← RETURN TO HOME](#)

ENHANCEMENTS TO DEALS MODULE

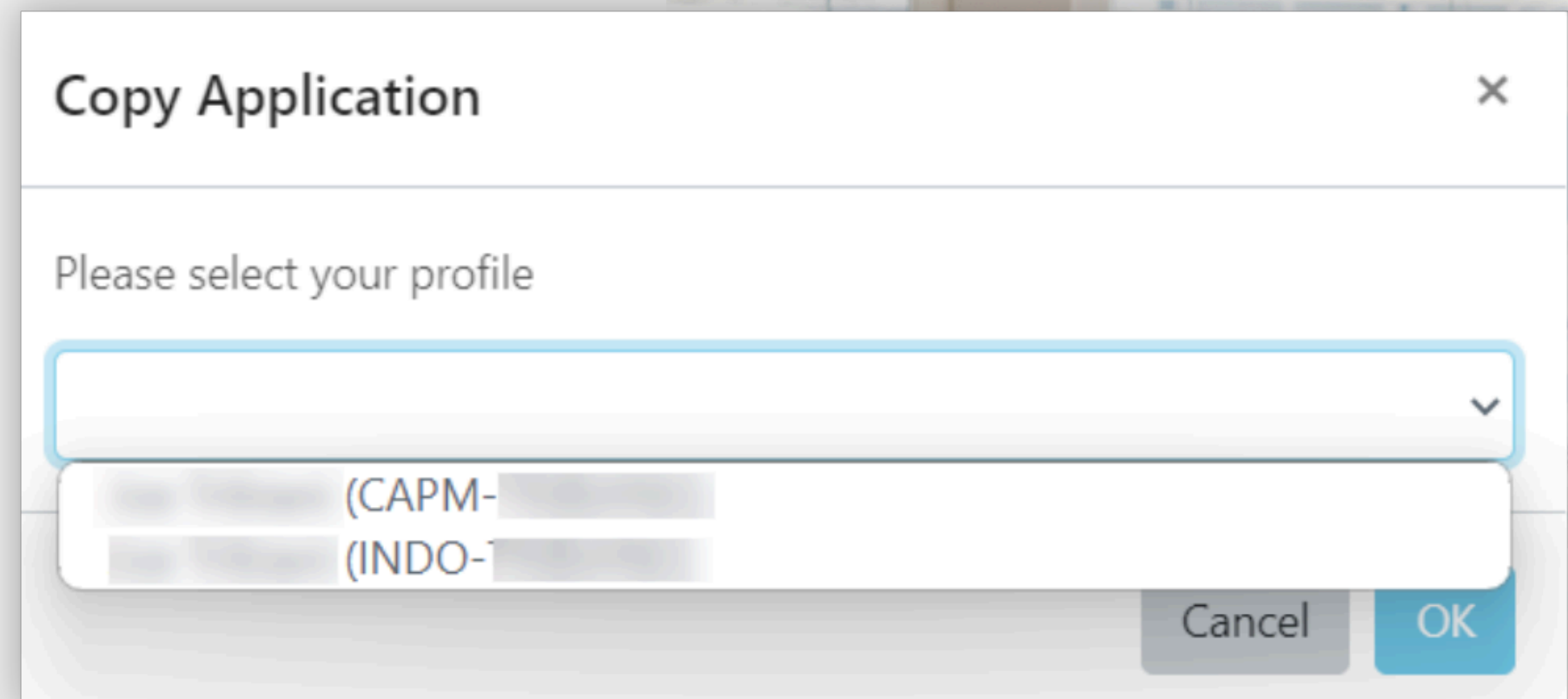
Ability to accept lender responses with a \$0 payment for Reverse Mortgages



ENHANCEMENTS TO DEALS MODULE

Ability to select agent profile when attempting to copy a deal

This feature is most useful for agents who have multiple accounts and profiles. An example of such a case are agents and users with more than one firm code.



ENHANCEMENTS TO DEALS MODULE

Ability to bulk delete applicant liabilities

Liabilities

Applicant 1

☒	Type	Limit	Balance	Ovr	Pay
☒ CB	Personal Loan	\$ 0.00	\$ 28,008.00	☐	\$
☒ CB	Credit Card	\$ 9,000.00	\$ 8,935.00	☒	\$
☒ CB	Credit Card	\$ 15,000.00	\$ 9,653.00	☒	\$
☒ CB	Other	\$ 0.00	\$ 183.00	☐	\$
Total:		\$24,000.00	\$46,779.00	\$632.67	

Delete Liabilities

+ Add Applicant 1 Liability

ENHANCEMENTS TO DEALS MODULE

Ability to generate Mortgage Commitment forms in French

Generate New Form

Document Type *

Mortgage Commitment (FR) x

- ☐ Amortization Summary and Schedule
- ☐ Client Consent Form
- ☐ Disclosure to Borrower
- ☐ Finder's Fee Disclosure
- ☐ Letter of Direction
- ☐ Mortgage Application
- ☐ Mortgage Commitment (EN)
- ☒ Mortgage Commitment (FR)
- ☐ Mortgage Summary
- ☐ Solicitor Letter
- ☐ Suitability Disclosure

New Notification Types

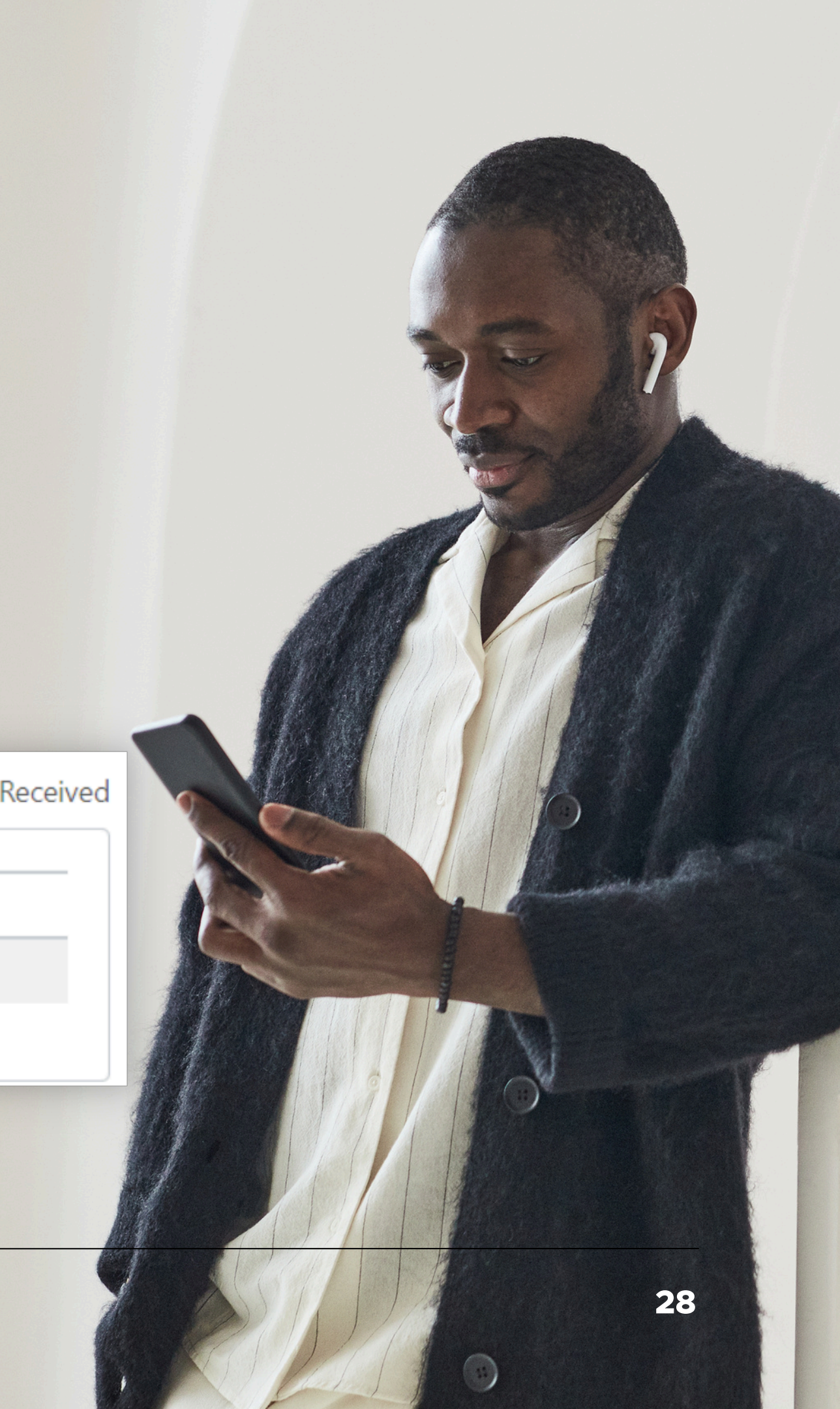
NEW NOTIFICATION TYPES

Ability to receive automatic email notifications upon receiving a reply to an SMS Text message triggered from Scarlett Mortgage



☒ SMS Message Received

Notification Recipient	Communication Type
[REDACTED]	Email



NEW NOTIFICATION TYPES

Ability to run and receive the Weekly Digest Email notification in real-time versus having to wait for the same notification to be received once a week

The screenshot shows a web application interface for configuring a notification. At the top, there's a header with "Notification Recipient" (jason@bfgbroker.ca) and "Communication Type" (Email). Below this, the "Header Section" allows setting a "Background Color" and "Font Color" to "#900028". The main content is divided into three sections: "This week at a glance", "Last week in review", and "In the next 6 months". Each section contains a list of items with corresponding dropdown menus for selection. For example, "Upcoming Condition of Financing" has a dropdown with "Approved, Accepted, Compliance Review, Re...". At the bottom right, there are three buttons: "Reset All To Default", "Run Now", and "Save". An orange arrow points to the "Run Now" button.

Notification Recipient	Communication Type
jason@bfgbroker.ca	Email

Header Section
Background Color: #900028
Font Color: #900028

This week at a glance
Upcoming Condition of Financing: Approved, Accepted, Compliance Review, Re...
Upcoming Closings: Approved, Accepted, Compliance Review, Re...
Upcoming Activities: Open
Mortgage Anniversaries: Work in Progress, New, Submitted, Pending, A...

Last week in review
New Applications: Approval
Mortgage Closings: Approved, Accepted, Compliance Review, Re...
Mortgage Pre-Approvals: Pre-Approval

In the next 6 months
Mortgage Renewals: Approved, Accepted, Compliance Review, Re...

Buttons: Reset All To Default, Run Now, Save

New and Enhanced Integrations

NEW AND ENHANCED INTEGRATIONS

Ability to access and view confirmed property information with the enhanced OPTA integration.
With this new enhanced function you can:

**Automatically download
and fill accurate and
confirmed property data**

Weekly Digest

Notification Recipient: jason@bfgbroker.ca

Communication Type: Email

Header Section

Background Color: #900028

Font Color: #900028

This week at a glance

Upcoming Condition of Financing: Approved, Accepted, Compliance Review, Re...

Upcoming Closings: Approved, Accepted, Compliance Review, Re...

Upcoming Activities: Open

Mortgage Anniversaries: Work in Progress, New, Submitted, Pending, A...

Reset Section To Default

Last week in review

New Applications: Approval

Mortgage Closings: Approved, Accepted, Compliance Review, Re...

Mortgage Pre-Approvals: Pre-Approval

Reset Section To Default

In the next 6 months

Mortgage Renewals: Approved, Accepted, Compliance Review, Re...

Reset Section To Default

Reset All To Default Run Now Save

← RETURN TO HOME

NEW AND ENHANCED INTEGRATIONS

Ability to access and view confirmed property information with the enhanced OPTA integration.
With this new enhanced function you can:

View and download property street and satellite images



NEW AND ENHANCED INTEGRATIONS

Ability to access and view confirmed property information with the enhanced OPTA integration.
With this new enhanced function you can:

Generate property reports to share with lenders



OPTA RESIDENTIAL REPORT

User name:

Joe Tribiani

Company:

IND-SCAR-Paul Smith

Deal Number:

14x782-e58geA7H2K53X40y6DzBw

Year built	2017
Total floor area (sq. ft)	3706
Foundation type	Basement
Architectural style	Detached
Building storeys	2
Kitchens	1
Bathrooms	More
Exterior wall type	Brick veneer
Roof type	Asphalt
Finished basement	Yes
Garage type	Built-in garage
Garage number of cars	2
Swimming pool	None
Heating type	Natural gas forced air
Auxiliary heating	Unknown
Plumbing type	Unknown
Commercial indicator	No
Outbuilding	Unknown
Lot size (sq. ft)	6936
Sewage type	Municipal
Water type	Municipal

Market value range

\$2,808,000 - \$3,108,200

opta

NEW AND ENHANCED INTEGRATIONS

Ability to access and view confirmed property information with the enhanced OPTA integration.
With this new enhanced function you can:

View property value estimates

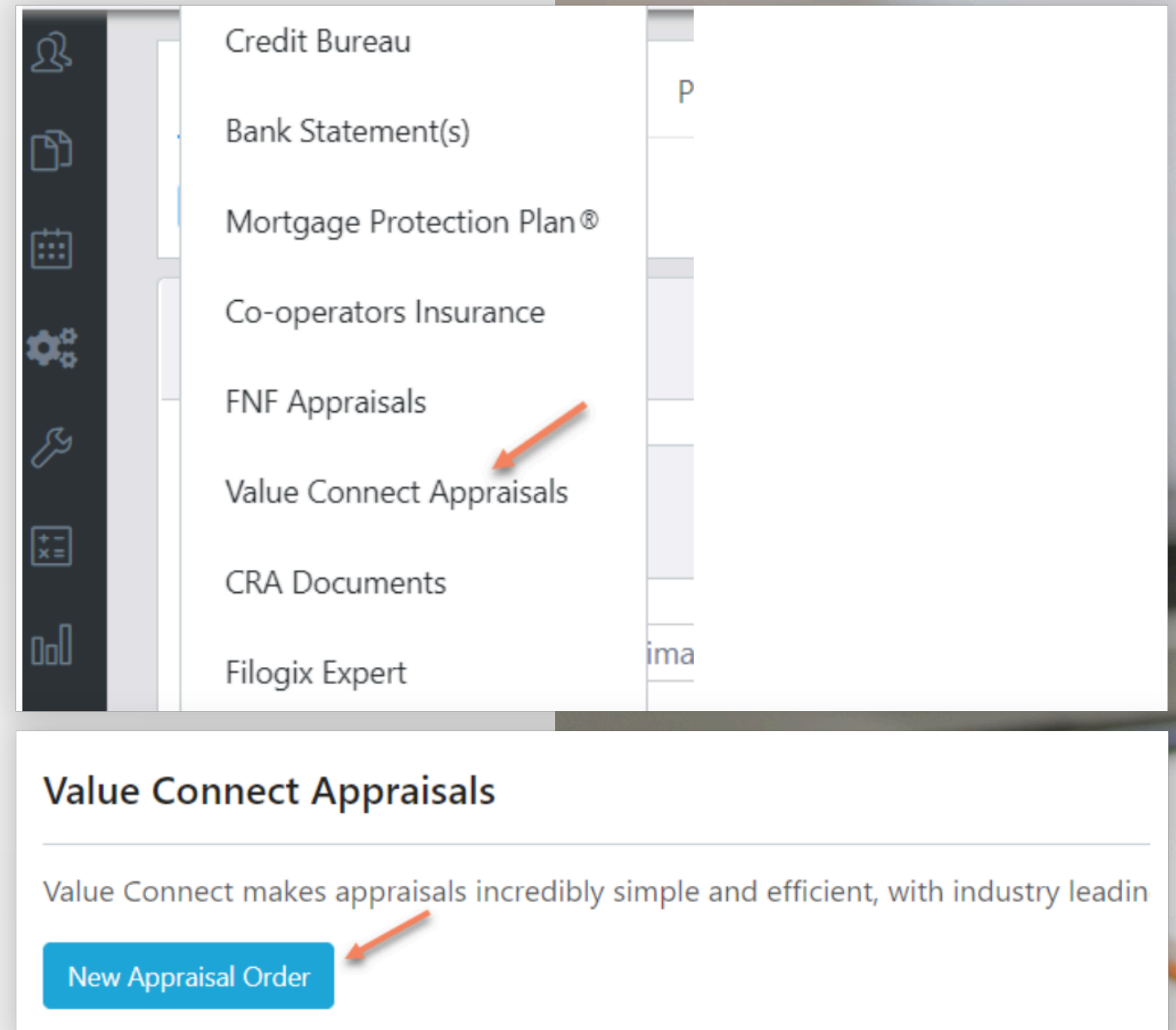


← RETURN TO HOME

NEW AND ENHANCED INTEGRATIONS

Ability to access and view confirmed property information with the enhanced OPTA integration.
With this new enhanced function you can:

Ability to submit appraisal requests via Value Connect



To Learn More Contact Sales...

📞 1.855.561.4399

✉️ sales@scarlettnetwork.com

