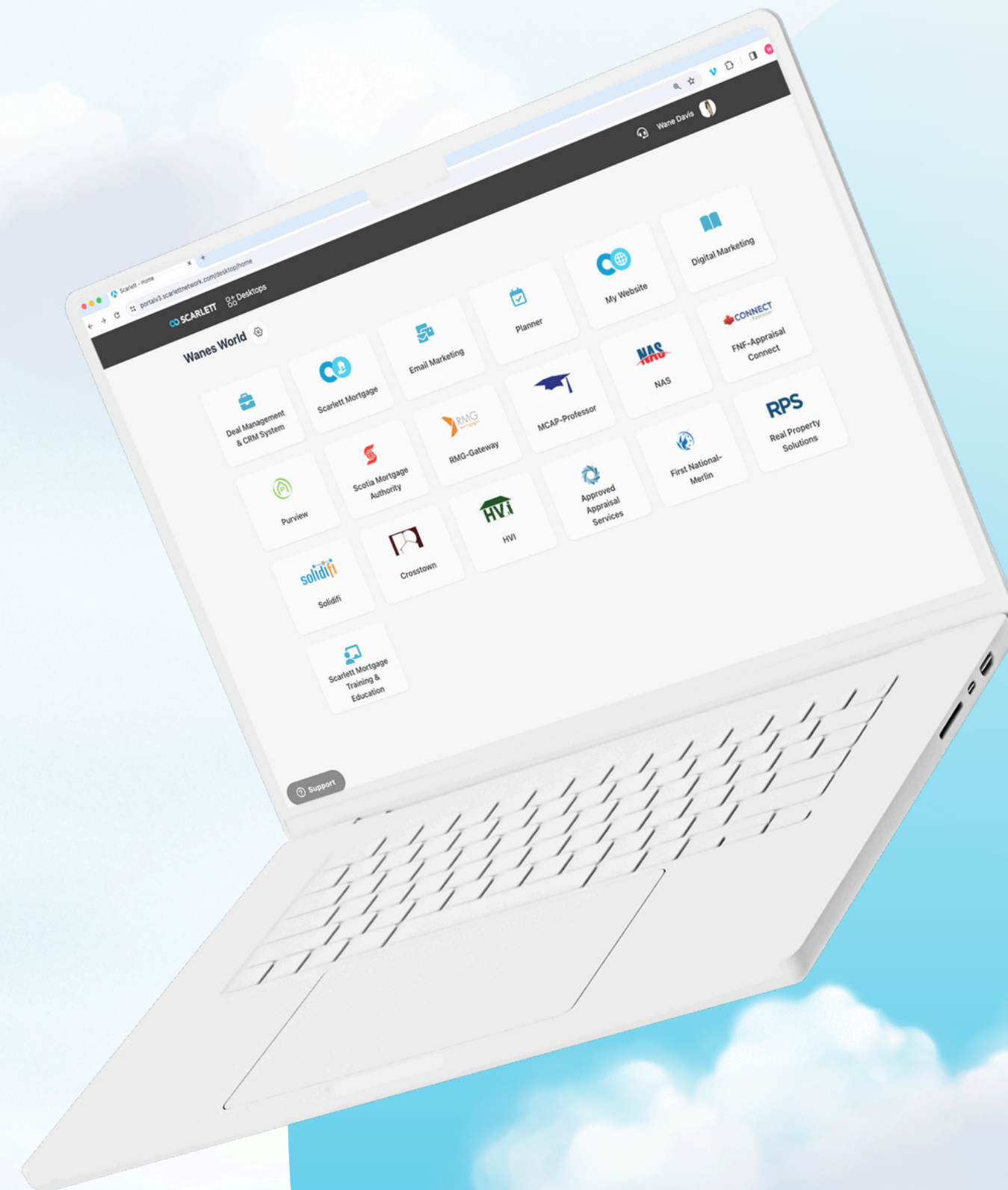


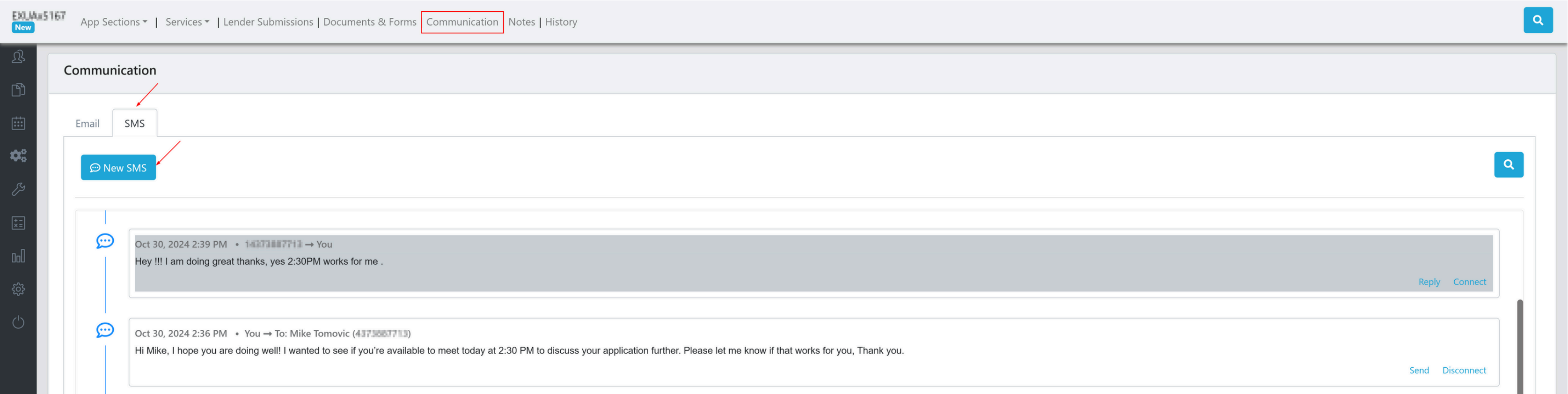
Scarlett Mortgage Release Notes

Version 1.1.7.24590



Incoming Call and SMS History

Agents who have set up their Twilio accounts, can view incoming and outgoing SMS messages relating to their applicants on the communication page for specific leads or deals.



All SMS logs are captured in the "Incoming Call and SMS History" section of the SMS History tab. This includes SMS logs that are not linked to a specific lead or deal.

×

Incoming call and SMS History

From Number:

164768976332

To(s):

14373887713

Date:

Oct 30, 2024 2:36 PM

SMS Received:

Hi Mike, I hope you are doing well! I wanted to see if you're available to meet today at 2:30 PM to ... Show More

Applicant(s):

Mike Tomovic (EXUAx5167)

From Number:

164768976332

To(s):

14373887713

Date:

Oct 30, 2024 2:34 PM

SMS Received:

Hi, I hope you are doing well! I wanted to see if you're available to meet today to discuss your app... Show More

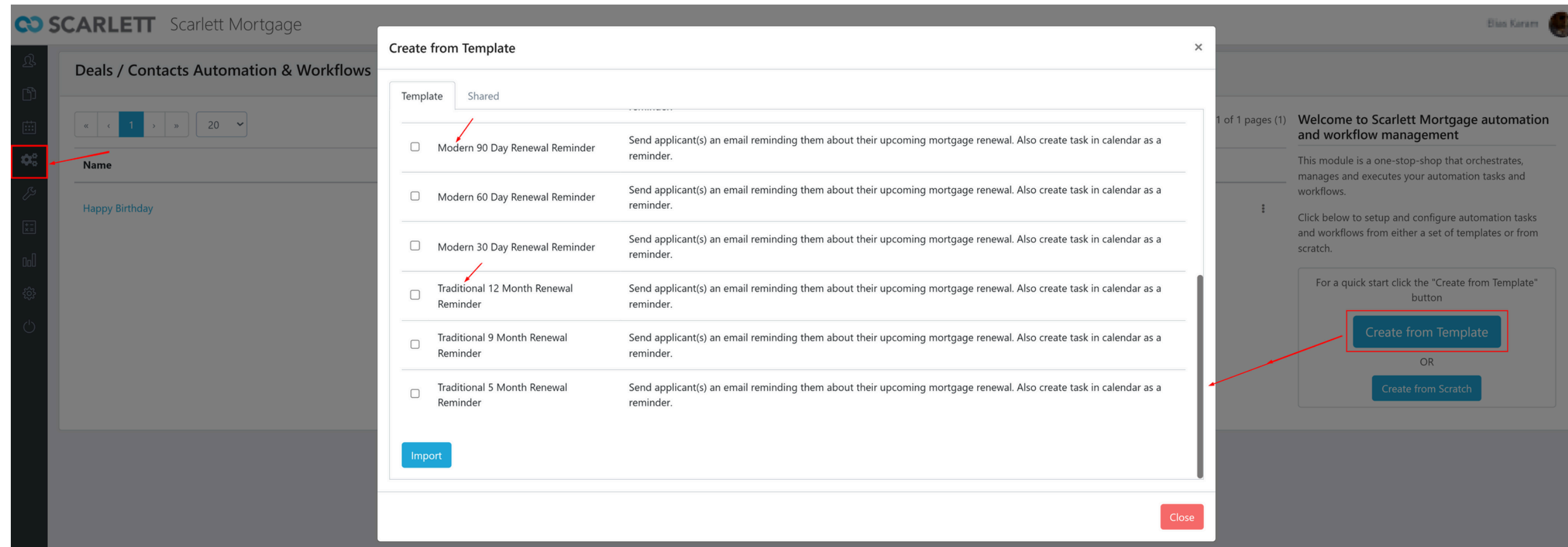
Applicant(s):

No match found

New Template Series for Renewals

We have enhanced our Renewal Email Template Series to help you target renewals, offering agents a choice of two styles for each of the 360, 120, 90, 60 and 30 Day categories.

- Modern template.
- Traditional template.



Both the Modern and Traditional template designs offer additional features, including the ability to select their profile color /brand colour to customize buttons and icons in the email template.



Compounding Period Field Added to Manual Lender Response

We have added a new field, "Compounding Period," to the manual lender response created by agents after a lender submission. This allows agents to modify the Compounding Period set in the application from the Manual Response function, without needing to change it within the application itself. This change may be reflected in the document(s) generated when a response is accepted.

EXL4317Submitted

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

Q

Lender Response

Lender Information

Decision *
Approve

Decision Date *
2024-10-30, 12:00 AM

Lender Reference #

Underwriter First Name *
Rojja

Underwriter Last Name *
Elangovan

Underwriter Phone #

Ext

Response Details

Mortgage Amount
\$ 300,000.00

Mortgage Insurance
\$ 0.00

Payment Frequency
Monthly

Payment
\$ 1,000.13

Total Mortgage Amount
\$ 300,000.00

Rate
0.001 %

Term
1 y 0 m

Amortization
25 y 0 m

Mortgage Insurer
Select...

Mortgage Insurance Reference #

Closing Date
2025-07-12

Commitment Expiry Date

Interest Adjustment Date
2025-07-07

Interest Adjustment Amount
\$ 0.00

Rate Hold Days
0

Rate Type
Fixed

Term Type
Closed

Compounding Period
Semi-Annually

Lender Notes

Cancel

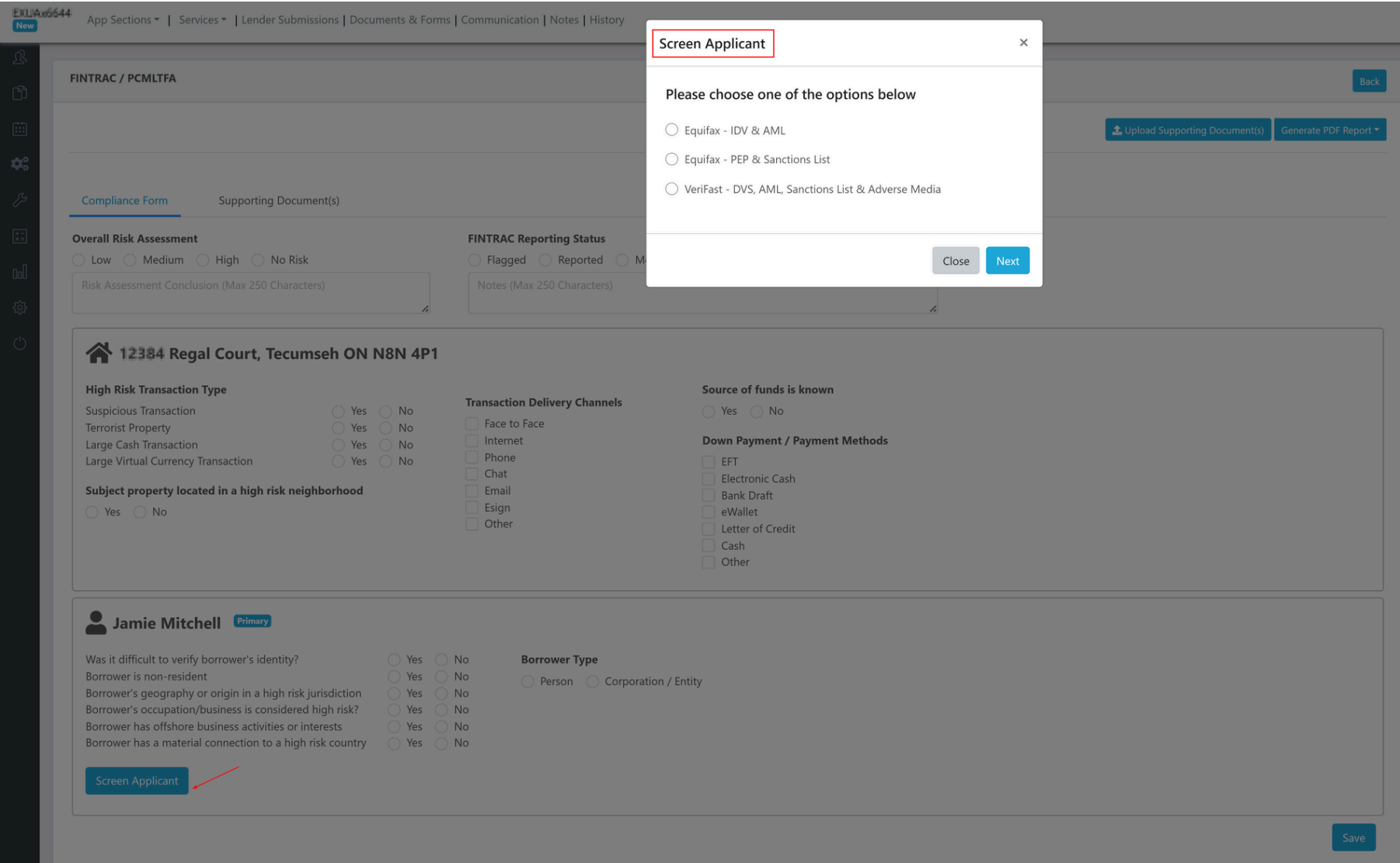
Submit

FINTRAC Equifax Integration

FINTRAC now includes a "Screen Applicant" Option. This provides the User with the ability to select from three available options to aid in screening their applicant(s).

- Equifax - IDV & AML .
- Equifax - PEP & Sanctions List .
- VeriFast - DVS, AML, Sanctions List & Adverse Media .

The Reports are provided as a downloadable PDF, which will also be accessible from the Documents and Forms section in Scarlett, in the FINTRAC folder.



Jamie Mitchell

Primary

Was it difficult to verify borrower's identity?

☐ Yes

☒ No

Borrower is non-resident

☐ Yes

☒ No

Borrower's geography or origin in a high risk jurisdiction

☐ Yes

☒ No

Borrower's occupation/business is considered high risk?

☐ Yes

☒ No

Borrower has offshore business activities or interests

☐ Yes

☒ No

Borrower has a material connection to a high risk country

☐ Yes

☒ No

Screen Applicant

Service

Date

Status

IDV

PSA

VeriFast - DVS, AML, Sanctions List & Adverse Media

Oct-10-2024 12:23:25 PM

Completed

Download

Download

Borrower Type

☒ Person

☐ Corporation / Entity

Is Applicant Politically Exposed

Not Politically Exposed

Borrower's identity was verified with the following:

☐ Government Issued Photo ID

☒ Credit File Method (min 3 years history)

☐ Dual Process Methods

☐ Previously Verified



We are here to help!

☎ 1.855.561.4399

✉ support@scarlettnetwork.com

All You Need Is One Platform

