

Scarlett Mortgage

Version 1.1.7.24591



Integration of Canadian Mortgage Application with Scarlett Mortgage

This integration aims to automate the creation of leads and deals in Scarlett Mortgage through webhooks triggered by agents using the Canadian Mortgage Application (CMA)

Settings

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> Mortgage Module Settings

> Email Accounts & Settings

> Zapier

> Lender Conditions

> Twilio Settings

> API Access

> My Preferences

> CMA Web Hook Links

Scarlett Mortgage agents can copy the webhook URLs generated in Scarlett Mortgage via the Scarlett settings page and paste them into the CMA Application for both Leads webhook and Deals webhook to enable lead or deal creation in Scarlett.

SCARLETT Scarlett Mortgage

Pragya Mangwani

CMA Web Hook Settings

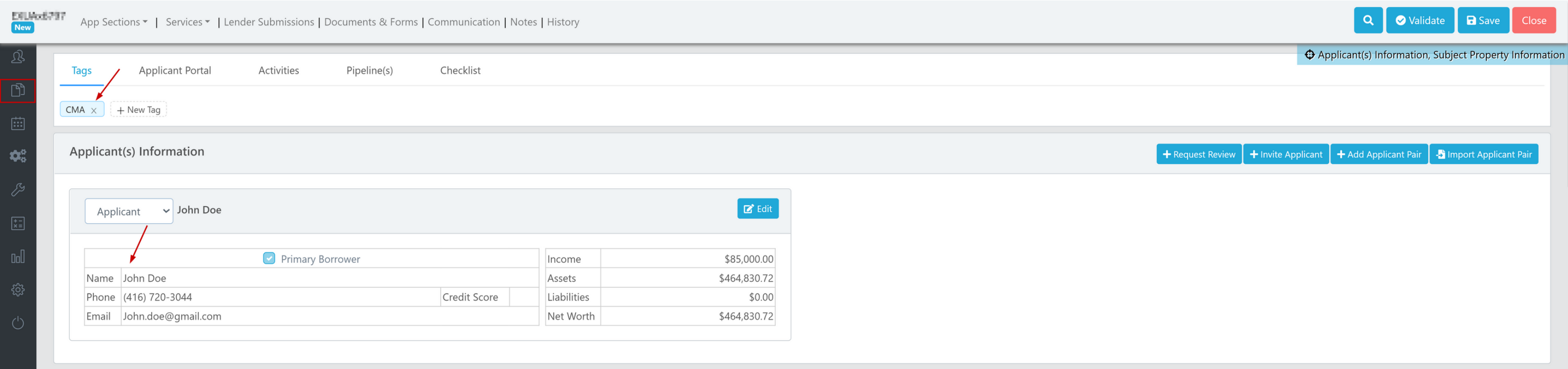
Web Hook URLs can be used to connect the Canadian Mortgage Application (CMA) with your Scarlett Mortgage account, allowing you to create new leads and deals when your clients interact with your CMA profile. "Create Web Hook URL" to get a new link, which you can easily copy to your CMA profile for quick access.

Create Web Hook URL

Name	Branch	CMA Webhook URL	Last Used	
Pragya Mangwani	IND-Queensgate Financial Group-BR1	Leads Webhook URL	https://api.scarlettnetwork.net/v1/cmaintenance/f1b6b044-d13b-4f9-ae9a-72def6a8825dd/create-lead	Copy To Clipboard
		Deals Webhook URL	https://api.scarlettnetwork.net/v1/cmaintenance/f1b6b044-d13b-4f9-ae9a-72def6a8825dd/create-deal	Copy To Clipboard
			Never	Revoke

Deal Integration with Scarlett Mortgage

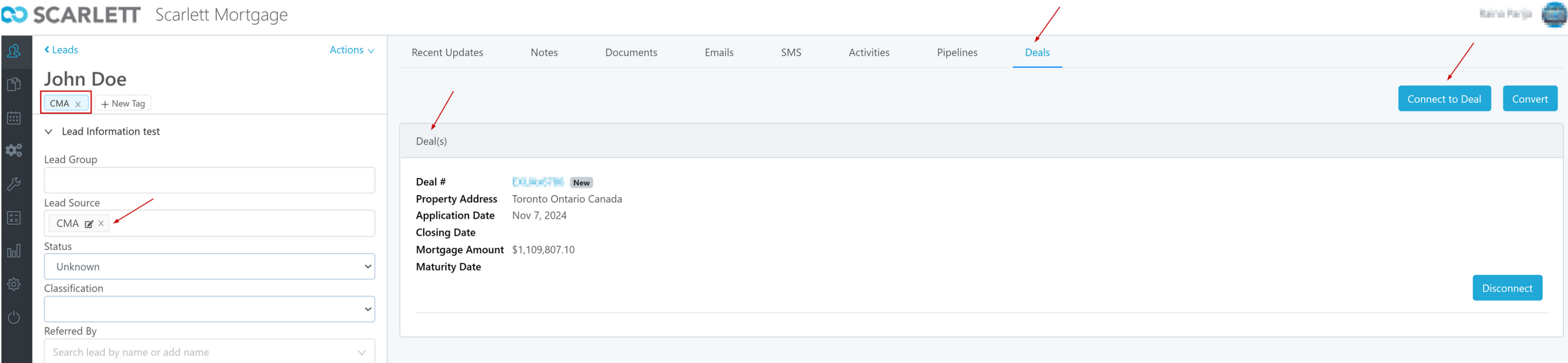
When CMA triggers a webhook with deal information, Scarlett Mortgage receives the webhook and creates a New Deal in Scarlett and it is tagged as "CMA".



Lead Integration with Scarlett Mortgage

When a new lead is created in Scarlett it is tagged as "CMA", and an email notification is sent to the agent. The webhook triggers Scarlett Mortgage to create a New Lead.

When a lead and deal are created together, they are automatically displayed on the Leads page under **Deals tab**.



Deal creation and updates are captured in the History page in Scarlett Mortgage.

New

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

🔍 Close

History

Action	Date	User	
View Action - Deal / File Accessed	Nov 19, 2024 1:37 PM	Raina Pateja	
Add Action - Applicant Assets	Nov 19, 2024 11:54 AM	Pooja (Sangwan)	Details
Update Action - Applicant Contact Details	Nov 19, 2024 11:54 AM	Pooja (Sangwan)	Details
Update Action - Applicant Income	Nov 19, 2024 11:54 AM	Pooja (Sangwan)	Details
Update Action - Applicant Owned Properties	Nov 19, 2024 11:54 AM	Pooja (Sangwan)	Details
View Action - Deal / File Accessed	Nov 19, 2024 11:51 AM	Pooja (Sangwan)	
View Action - Deal / File Accessed	Nov 15, 2024 9:22 AM	Pooja (Sangwan)	
View Action - Deal / File Accessed	Nov 14, 2024 4:01 PM	Pooja (Sangwan)	

We are here to help!

☎ 1.855.561.4399

✉ support@scarlettnetwork.com

All You Need Is One Platform

