

Scarlett Mortgage

Version: 1.1.7.24596



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1. Lender Submission - Other lenders (Override the permission)

This change allows agents without standard submission permissions to create manual submissions using the **"Other" lender option**. The option to submit a deal will only appear when these users have selected the "Other" lender option.

Lender Submission(s)

Mortgage Position: First

Application Type: Pre-Approval

Lender: Zenvest Capital

Agent: [Redacted]

Submission Agent: [Redacted]

Language: [Redacted]

Lender Notes: [Redacted]

Other (1)

Other

You do not have permission to submit this deal. Please contact your office administrator or system support group to change your permissions.

CAPMx1729 App Sections + | Services + | Lender Submissions | Documents & Forms | Communication | Notes | History

Lender Submission(s)

Mortgage Position: First

Application Type: Pre-Approval

Lender: Other

Lender Name: [Redacted]

Agent: [Redacted]

Submission Agent: [Redacted]

Language: English

Lender Notes: [Redacted]

Principal Borrower: [Redacted]

Application Purpose: Purchase

Closing Date: [Redacted]

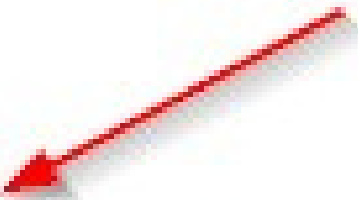
Purchase Price/V: \$795,000.00

Validate Insert Consent Text Generate Notes Submit

2. Add Applicants Assigned to Mortgage in History

Assigning & unassigning applicants from a mortgage is now tracked and accounted for within the deal's History tab.

Applicant(s) Assigned to this Mortgage

- ☒ Applicant: John Doe
 - ☐ Applicant: Mary Doe
 - ☐ Applicant: Mary Jane
 - ☒ Applicant: Mark Carney
- 

History

Action	Date	User	
Update Action - Mortgage Request: Mary Doe is unassigned from the first mortgage	Apr 29, 2025 4:56 PM	Devante D.D. Bally	
Update Action - Mortgage Request: Mary Jane is unassigned from the first mortgage	Apr 29, 2025 4:56 PM	Devante D.D. Bally	

3. Auto-Doc - Rename the "Category" as Owner Occupied /Second Home Other Properties

Previously, there was not a clear Auto Doc category for Second Home Properties. So, the Owner Occupied Auto Doc category has been re-named to "Owner Occupied / Second Home Other Properties". If a property's Occupancy status is set to Owner Occupied, Owner-Occupied & Rental, or Second Home Occupancy, then Auto Docs will populate documents based on this category.

Properties Owned By Applicant(s)

Applicant 1 - Property - 1

Address Lookup

Start typing your address...

Unit #

Street #

Street Name

Street Type

City

Province

Postal Code

Occupancy

Property Value

Original Value

% of Condo Fees

Heating

215

15

Stafford

Street

Toronto

Ontario

M5V

Rental

\$ 600,000.00

\$ 350,000.00

/m

50

%

\$ 120.00

/m

Owner-Occupied

Owner-Occupied & Rental

Rental

Second Home

SCARLETT Scarlett Mortgage

Apps & Deals > Auto Docs

Add Documents

Refinance Deal

Document Type

Note

Active Home Insurance Policy

Most Recent

Mortgage Statement

Most Recent

Municipal Tax Bill

Most Recent

Add Document

Document Type

Category

Interest Income

Other Income

Owner Occupied / Second Home Other Properties

Part Time Employment

Pension Income

Purchase Deal

Refinance Deal

to-ID

Cheque

Photo-ID

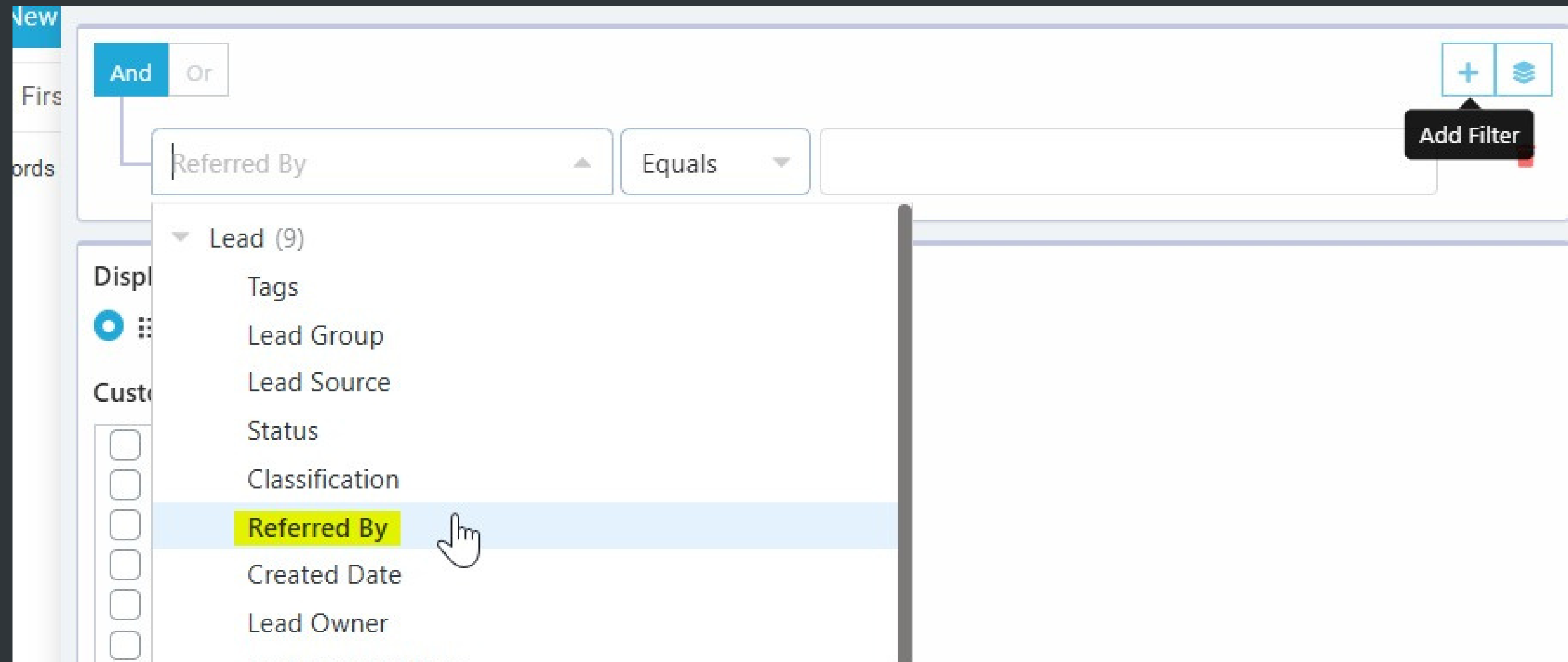
Full Time Employment

Part Time Employment

Seasonal Employee

4. Leads Add Referred By to Filter

A new “Referred By” filter has been added to the Leads section.



5. Permission to View Deal currently does not support viewing Lender Submissions / Responses

This update improves how permissions work on the Lender Submission page to better match user roles.

- Users with View Deal access will now be able to view submission response details.

Submission History

Refresh

1st Mtg

2nd Mtg

 demodb

Application

Lender Note

Add Manual Response

Lender	Application Type	Loan Amount	Submission Date/Time
demodb	Pre-Approval	\$620,250.00	Apr 16, 2025 4:40 PM
Response Date/Acceptance Date	Response Type	Commitment Expiry Date	
Apr 16, 2025	Approve Manual Response		Accept View Edit Delete

- Users with Create/Edit Deal access will continue to have full access (view, edit, delete, & add manual responses).

Submission History

Refresh

1st Mtg

2nd Mtg

 demodb

Application

Lender Note

Add Manual Response

Lender	Application Type	Loan Amount	Submission Date/Time
demodb	Pre-Approval	\$620,250.00	Apr 16, 2025 4:40 PM
Response Date/Acceptance Date	Response Type	Commitment Expiry Date	
Apr 16, 2025	Approve Manual Response	Accept View Edit Delete	

6. Create a search function for automations

A search bar is now available at the top of the Automation & Workflow module to help users quickly find any automation they have previously configured.

Deals / Contacts Automation & Workflows

« < 1 2 > »

20 ▾

1 of 2 pages (34)

Automation / Workflow name

🔍

Name	Next Run Date	Status
Happy Canada Day Send an email to all applicants with an email address wishing them a Happy Canada Day	Recurrent: Yearly, repeat every 1 year(s) on July 1	OFF
Applicant Follow-Up (Pre-Approval) Create task in calendar as a reminder to follow-	Recurrent: Daily, repeat every 1	OFF

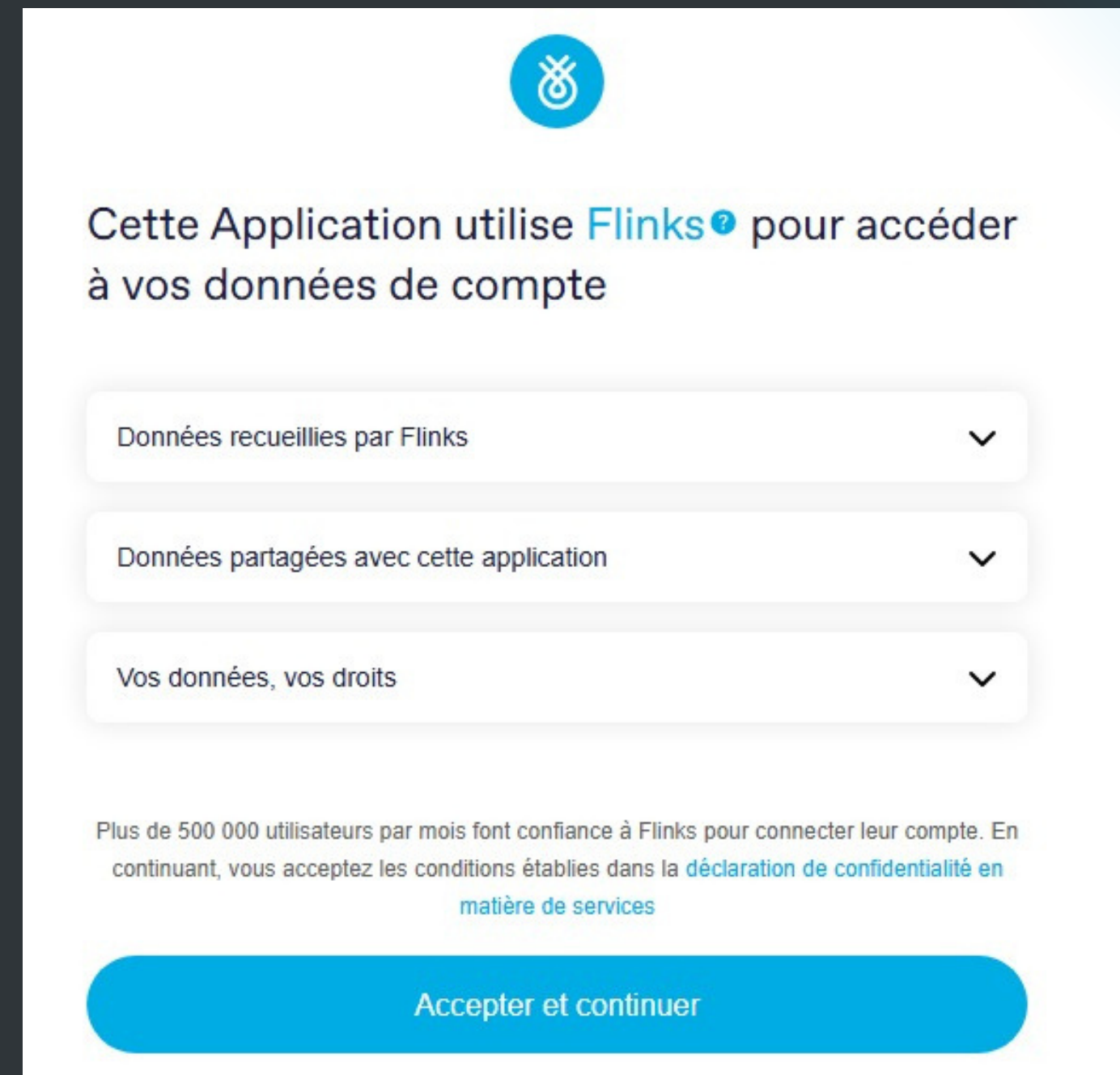
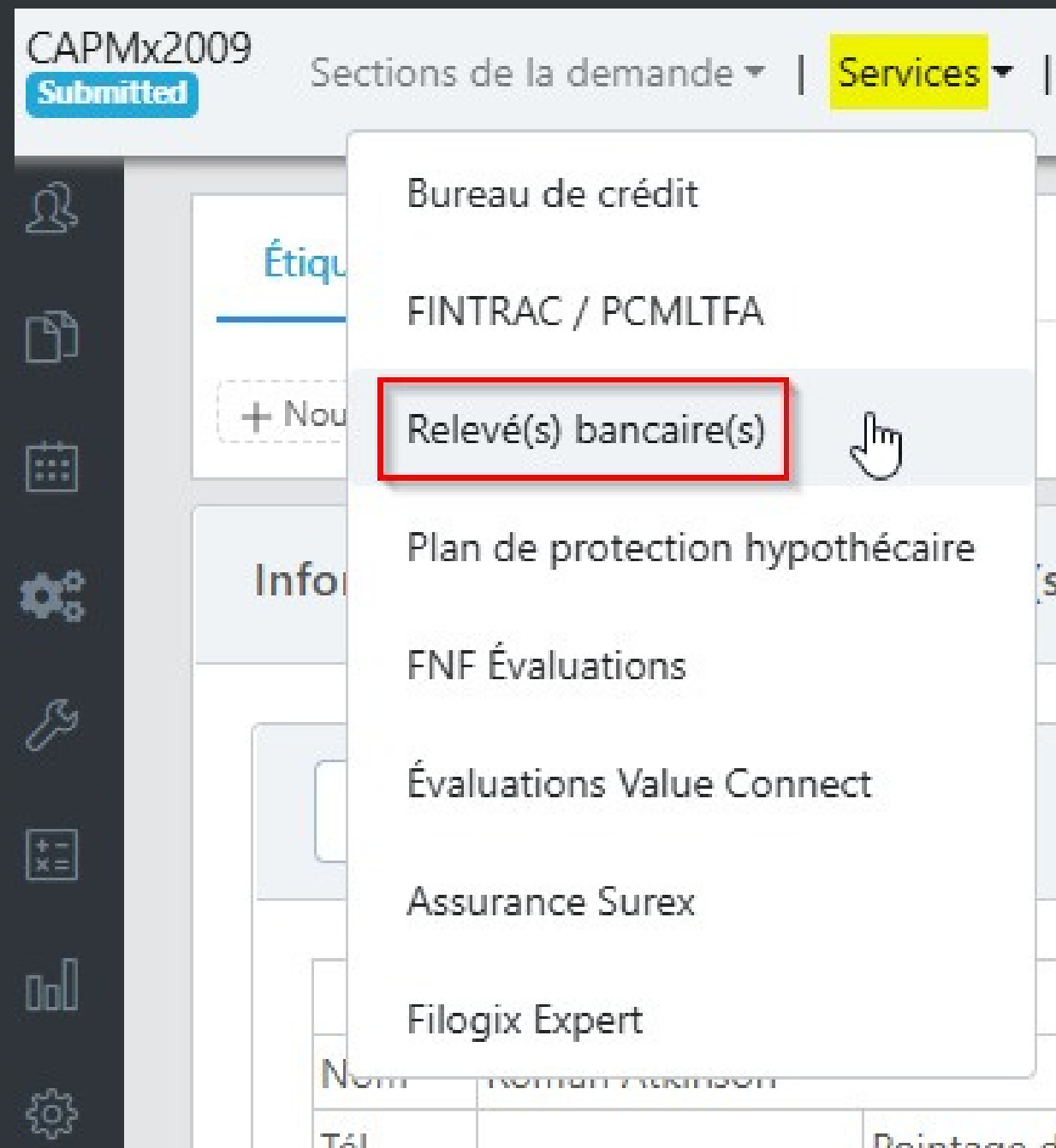
Welcome to Scarlett Mortgage automation and workflow management

This module is a one-stop-shop that orchestrates, manages and executes your automation tasks and workflows.

Click below to setup and configure automation tasks and workflows from either a set of templates or from scratch.

7. Flinks page translate to French

When a user has set their Scarlett Mortgage language preference to French, the Flinks Bank Statement portal sent to their clients will be translated to French upon receipt.



8. E-Sign - Add Delete Function

The update adds more control over e-signature workflows with the ability to **delete e-sign envelopes** when needed. A user can delete e-sign envelopes if:

- The signing package is still in Draft and has not been sent
- The envelope is sent, but neither party has begun signing (all sides in Pending)

Tags

Applicant Portal

Activities

Pipeline(s)

Checklist

Notes

Portal

Documents

Sign

Messaging

Create Signing Package

Document	Sent	Package Status	Signature Status	
Disclosure to Borrower, T5 Investment Income	Apr 30, 2025 11:15 AM	DRAFT	John Doe - Pending Mary Doe - Pending	Edit Delete
T5 Investment Income, Disclosure to Borrower, Photo-ID	Apr 8, 2025 1:40 PM	DRAFT	John Doe - Pending Mary Doe - Pending	Edit Delete
Void Cheque	Apr 8, 2025 1:34 PM	SENT	John Doe - Pending Mary Doe - Pending	Edit Delete
Disclosure to Borrower	Apr 8, 2025 1:25 PM	DRAFT	John Doe - Pending Mary Doe - Pending	Edit Delete
Employment / Job Letter, Photo-ID	Apr 3, 2025 4:28 PM	DRAFT	John Doe - Pending Mary Doe - Pending	Edit Delete

9. Fintrac-Generated PDF Report: Download or Upload in English and French

The update allows users to generate then download or upload FINTRAC compliance reports in either English (EN) or French (FR), depending on their requirements.

FINTRAC / PCMLTFA

Back

Upload Supporting Document(s)

Generate PDF Report ▾

Compliance Form

Supporting Document(s)

Overall Risk Assessment

☐ Low ☐ Medium ☐ High ☐ No Risk

FINTRAC Reporting Status

☐ Flagged ☐ Reported ☐ Removed ☐ Not Reported

Download (EN)

Download (FR)

Upload to Docs & Forms (EN)

Upload to Docs & Forms (FR)

10. Activity Page - Additional fields to be displayed before "Show More"

This update has improved the activity creation experience by bringing the most important fields front and center. Users will now see the following fields immediately, without needing to click the "Show More" button.

Schedule Activity

Activity Subject

Apr 30,2025

hh:mm AM

-

Apr 30,2025

hh:mm AM

☐ All Day

Notes

Notes are private and visible only within your Scarlett Mortgage account.

Belong To

☒ Deal ☐ Lead

Devante D.D. Bally (CAPM-DEVANTE)

☐ Notify Owner ☐ Notify Agent on Deal

CAPMx2040

Applicant(s)

Load Applicant(s)

Show more...

11. Replication of the Notes Tab inside a Scarlett deal

The Notes tab is now available in two spots - amongst the top module items and within the lower deal sections.

CAPMx2028
Submitted

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



Tags

Applicant Portal

Activities

Pipeline(s)

Checklist

Notes

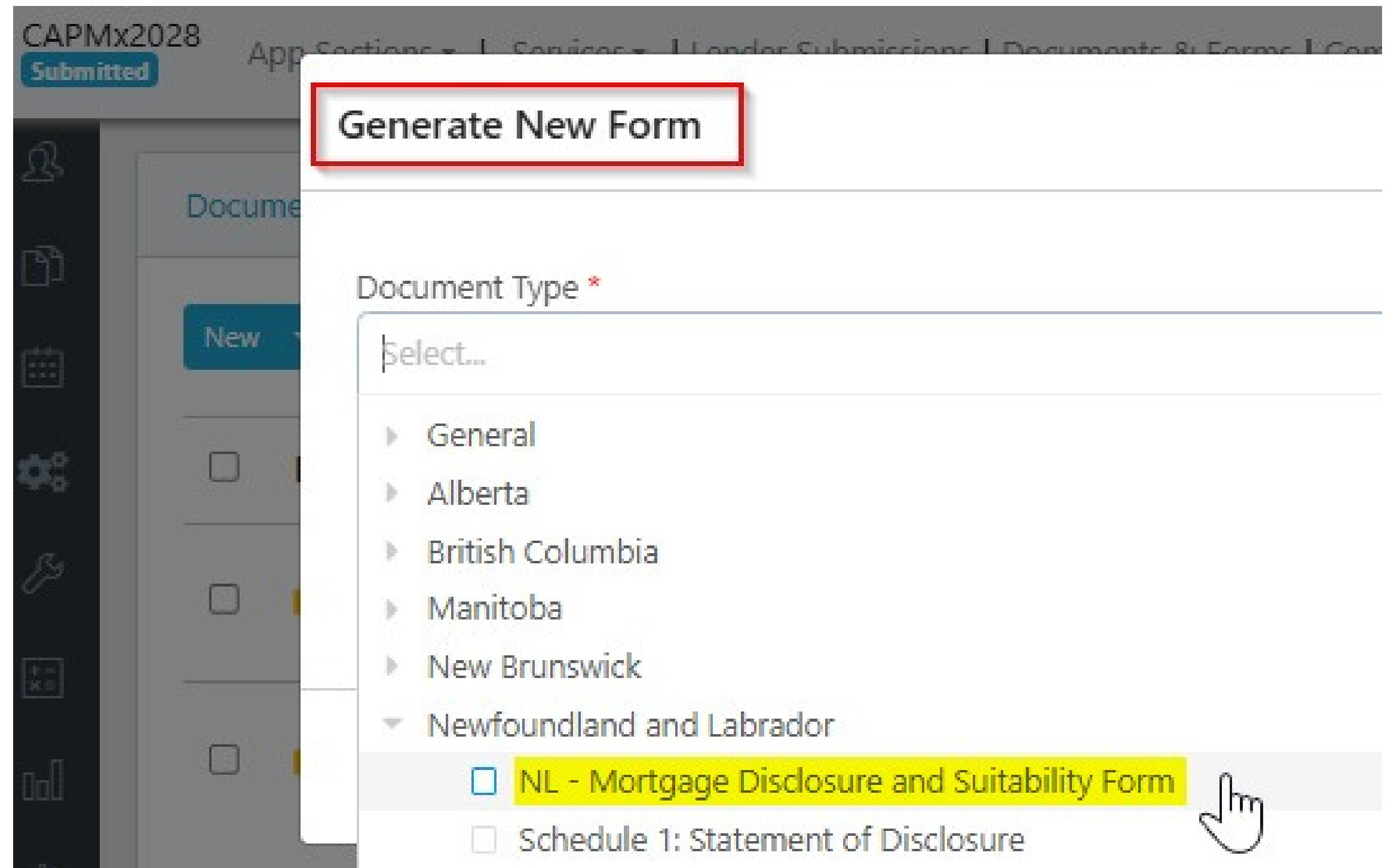
Notes (CAPMx2028)

+ Add Internal Note

Date	User	Category	Details
Apr 30, 2025 2:54 PM	Devante D.D. Bally	General	Samples notes for the deal

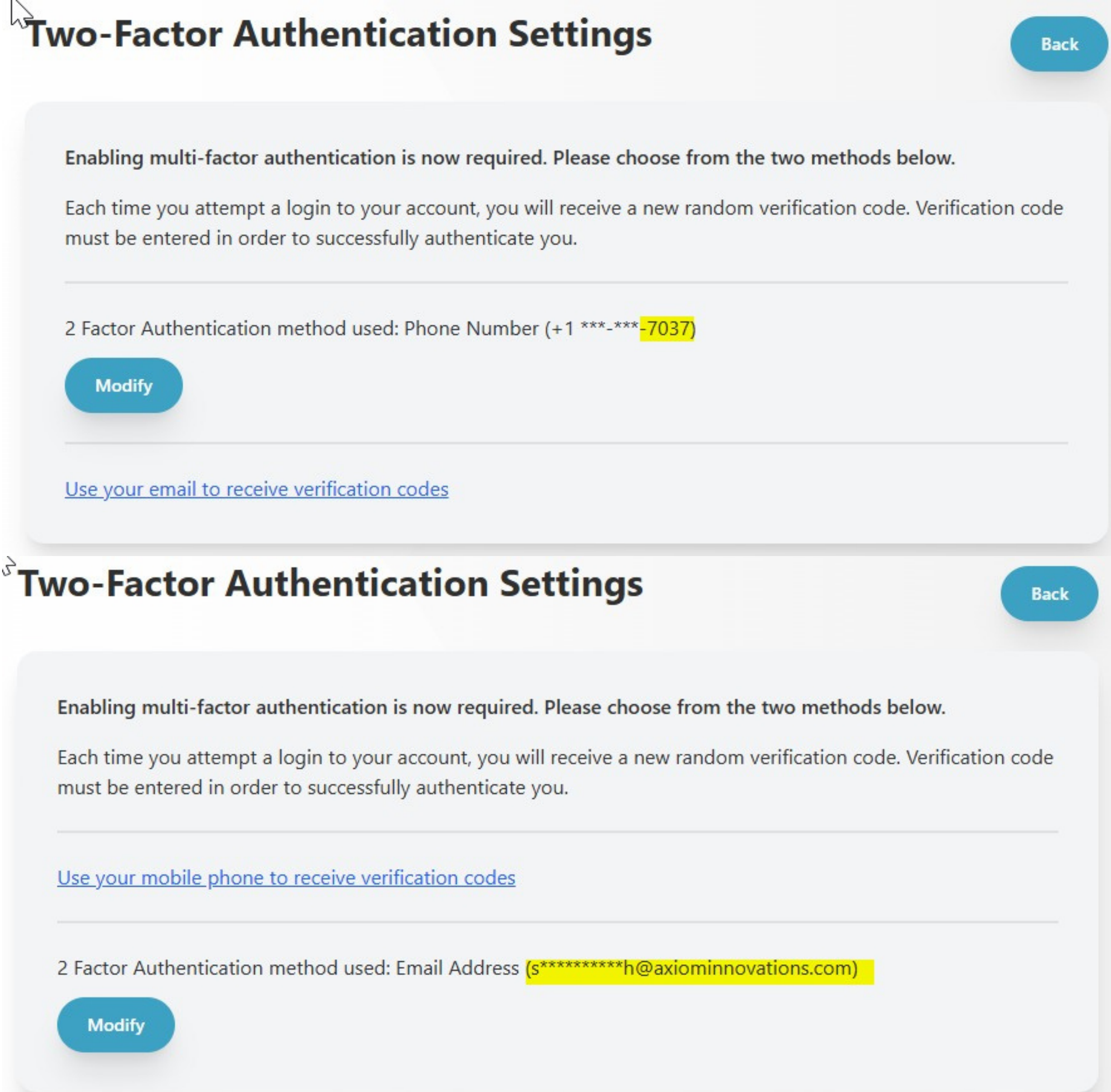
12. New Form for Newfoundland and Labrador

A new Mortgage Disclosure And Suitability Form has been added under 'Newfoundland and Labrador' in the Generate New Form section for users.



13. Scarlett 2 FA - Display Method and masked information

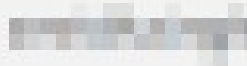
Users can now see which 2FA method they're using (phone or email) and can update this at any time through their Two-Factor Authentication Settings.



14. New Incoming System Notifications (Deal Assigned to me – As Agent on deal)

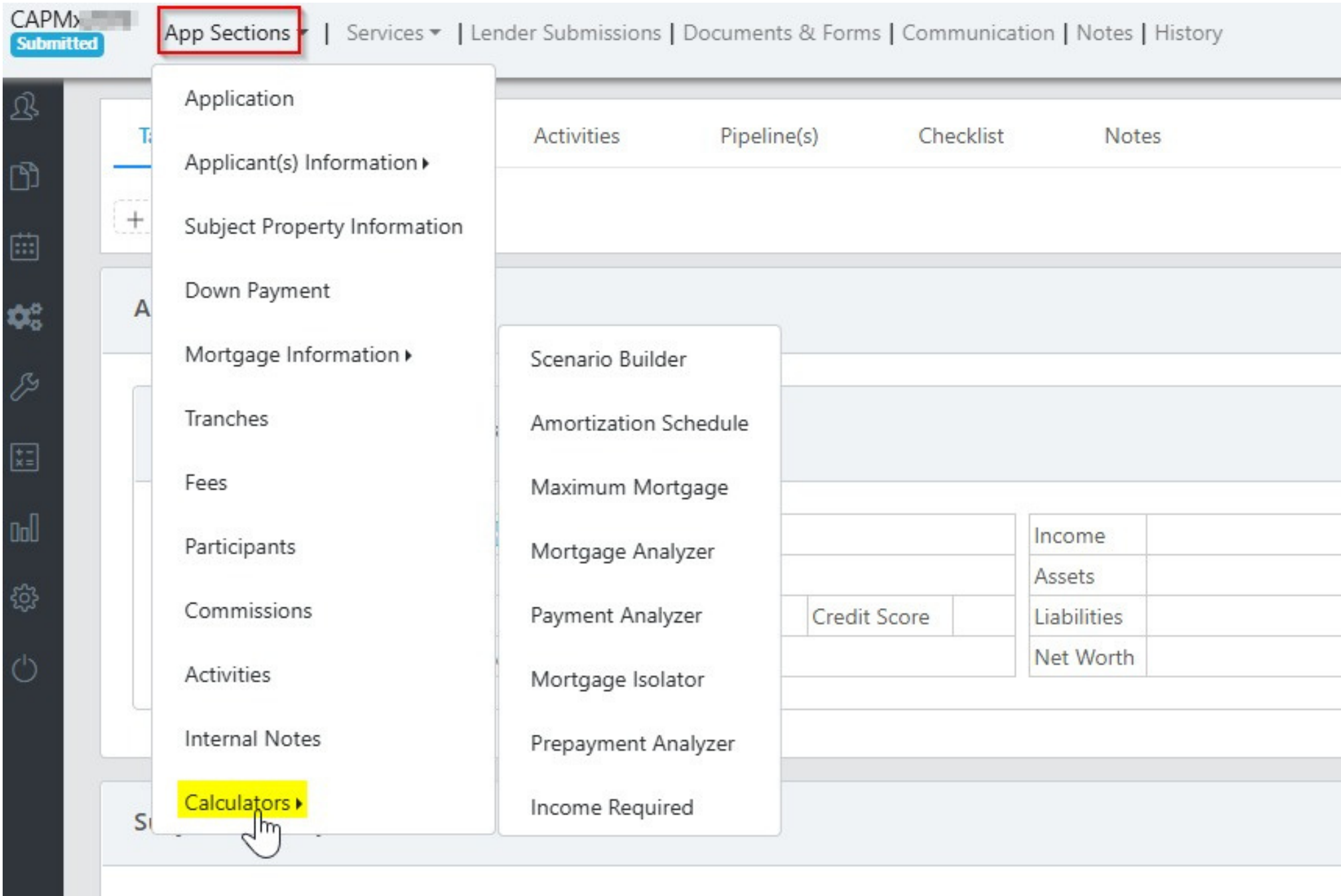
If enabled in their settings, Agents will now receive an email notification whenever a new deal is assigned to them by another Scarlett user.

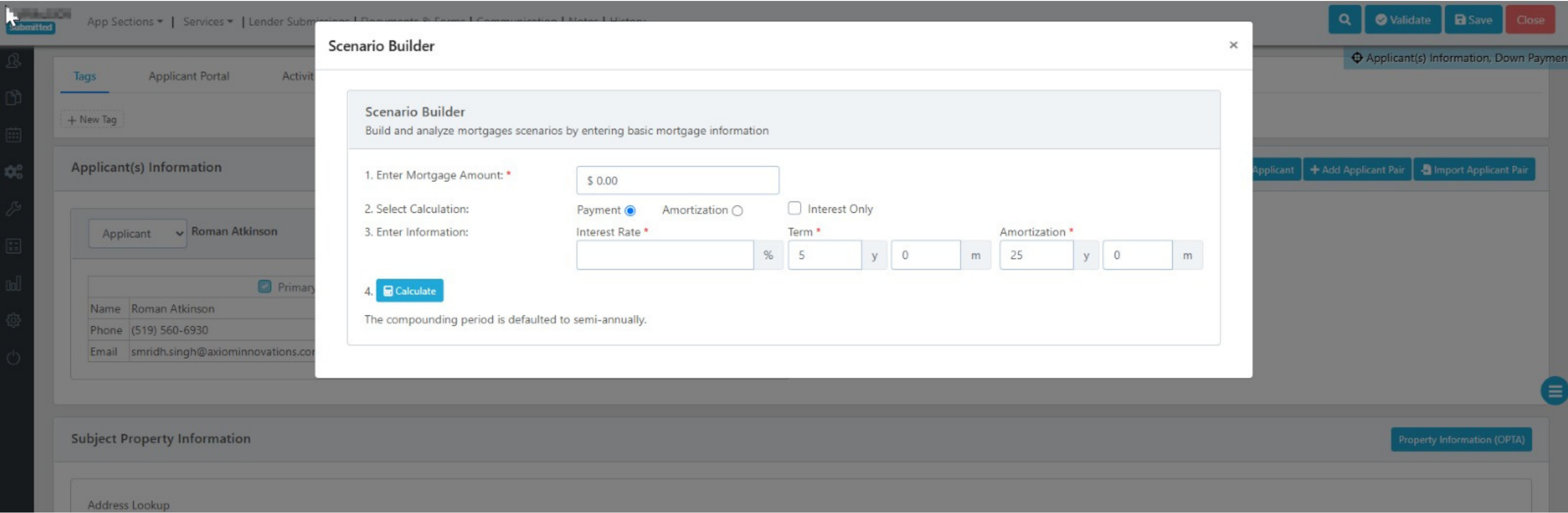
 Deal Assigned to Me (As Agent On Deal)

Notification Recipient	Communication Type
 @axiominnovations.com	Email

15. Add Calculators to App dropdown & Hamburger Menu menu

This update adds calculators directly within a deal. Users can run calculations while working on a deal without needing to exit that deal, keeping everything in one place for a smoother workflow.





16. Add Participant Status in Deal Filter & Add Additional Status Field in Application Report

Participant Status (Active or Inactive) has been added as a new filter option and is now available across other areas of the Scarlett Mortgage Platform.

The screenshot displays the 'Participants' form in the Scarlett Mortgage Platform. The form is titled 'Participants' and includes a close button (X) in the top right corner. The form fields are organized as follows:

- Participant Type:** A dropdown menu.
- Active?:** A dropdown menu with 'Yes' and 'No' options. The 'Yes' option is currently selected.
- Share with team?:** A dropdown menu.
- First Name:** A text input field.
- Last Name:** A text input field.
- Company Name:** A text input field.
- Mobile Number:** A text input field.
- Email:** A text input field.
- Address Line 1:** A text input field.
- Address Line 2:** A text input field.
- City:** A text input field.
- Province:** A dropdown menu.
- Postal Code:** A text input field.
- Special Notes:** A text area.
- Communication Consent:** A section with checkboxes for 'Email' and 'Phone'.

At the bottom of the form, there are 'Close' and 'Save' buttons.

=> Field Added in participant section

Applications Report Criteria

The Applications Summary Report allows you to gather applications based on selected criteria.

Level: *

Agent [Select all](#)

Deal Source:

Lender:

Application Status:

Application Type:

Referral Source:

Referral Source Status:

Date Type:

Active

Inactive

Group By:

Run Report

✓ Set Default Settings

✓ Reset To Default

✕ Exit

=> Field added in
Application Report Section

AndOr

Participant Type

In

Referral Source X

Participant Status

=

Active

Display

☒ Tiles

☐ List

Customize View

☒ Subject Property Address

☒ Application Date

☒ Closing Date

☒ Maturity Date

☒ Application Type

☒ Applicant Information

☒ Financing Waiver

☒ Participants

☒ Activities Summary

‘Participant Status’ is now available as a filter

17. FINTRAC / Equifax - Update PEP & Sanctions details in PDF

The Equifax Pep & Sanction PDF report now displays more detailed information when there's a positive match for PEP (Politically Exposed Person) or Sanctions screening.

Applicant PEP/Sanctions List Report

Borrower Name:

Application #:

Date of Birth:

Agent/User:

Request/Search Date & Time:

02:46:18 PM

PEP Screening

Result:

Yes

Note:

Provides indication as to whether an individual has been located on a politically exposed persons (PEP) list.

Details:

Name of PEP list(s) the subject was located on.
PEPChecker

Sanctions List

Result:

Yes

Note:

Provides indication as to whether an individual has been located on a sanctions list.

Details:

Name of Sanctions list(s) the subject was located on.
OFAC SDN List
HMT Sanctions List UK
France DG Tresor Sanctions List
US ITA Consolidated Screening List
Belgian Financial Sanctions
EU Consolidated Travel Bans
EU EEAS Consolidated Sanctions
French National Asset Freezing System
Monaco National Fund Freezing List
Swiss SECO Sanctions and Embargoes
UK FCDO Sanctions List

Verification Source

Equifax

18. Bulk Status Update & Bulk Agent on Deal change for list view

Users can now select multiple deals to add those deals to a custom Pipeline, change the status of those deals, or re-assign the Agent On Deal for multiple deals at once directly from their Deal Dashboard while in List-View using the new Bulk Actions menu.

+ New

☐	Deal #	Property Address	Applicant(s)	Term	Amortization	Loan Amount	Net Rate	Interest Ra...	Discount R	down ...	Closing Date	Application Stat...	Application
☒	CAPMx				25 y	\$1,946,710.00	0%	0%		0%	2025-07-03	Submitted	Approval
☒	CAPM	Waterloo Ontario Canada			25 y	\$873,107.00	0.000%	0%		0%	2025-06-25	New	Pre-Approval
☒	CAPM	Ontario Canada			25 y	\$0.00	0%	0%	0%	0%		New	Approval
☐	CAPMx	Ontario Canada			25 y	\$0.00	0%	0%	0%	0%		New	Approval
☐	CAPMx	Ontario Canada			25 y	\$0.00	0.000%	0%	0%	0%		New	Approval
☐	CAPMx	Ontario Canada			25 y	\$0.00	0%	0%	0%	0%		New	Approval

Bulk Actions

Pipeline(s)

Deal # / Applicant Name / Address / Phone # / Tag

Q

Add to Pipeline

Change Deal(s) Status

Change Agent on Deal

We are here to help!

☎ 1.855.561.4399

✉ support@scarlettnetwork.com

All You Need Is One Platform

