

Scarlett Mortgage

Release Notes Version: 2.0.1



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1. Label change for Document(s) Request function under Applicant

Improvement to the Document(s) Request feature in the Applicant Portal to give agents more flexibility and improve clarity for clients:

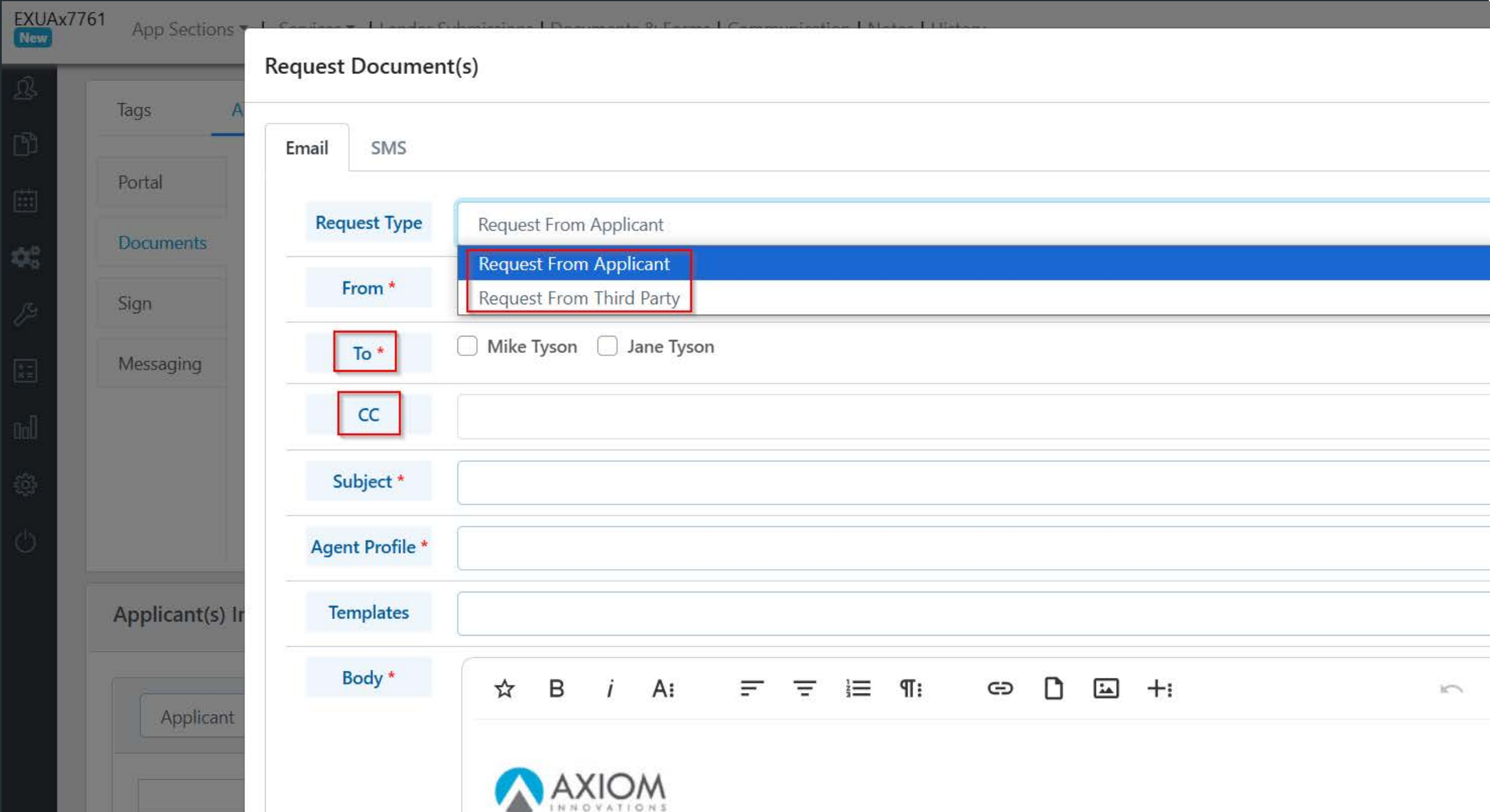
New “CC” Option:

Agents can now add a CC (carbon copy) email address when requesting documents from applicants for better tracking & follow-up

Labels for Sender and Recipient(s) have been updated to improve clarity:

- The Request Type options were revised as follows:
- “From Applicant” is now “Request from Applicant”
 - “From Third Party” is now “Request from Third Party”

The Applicant(s) field has been renamed to “To”



2. Rules update for the interview selections "Renewal" and "Refinance"

This new rule refines the application flow for refinance and renewal options, creating a more efficient and focused experience for clients.

The change is as follows:

- **For Refinance Application:** - The Realtor section has been removed

SCARLETT by AXIOM

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SAVE & CLOSE

?

YOUR APPLICATION MENU >

● Interview

● Subject Property

● Applicant(s)

● Solicitor

● Questions

● Document(s)

● Finalize

How about you tell us a little bit about the purpose of your application?

PURCHASE A NEW HOME

REFINANCE AN EXISTING MORTGAGE

RENEW AN EXISTING MORTGAGE

GET CONSTRUCTION FINANCING

APPLY FOR AN UNSECURED LOAN

- **For Renewal Application:** Both the Realtor & Solicitor sections have been removed

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SAVE & CLOSE

?

YOUR APPLICATION MENU >

● Interview

● Subject Property

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How about you tell us a little bit about the purpose of your application?

PURCHASE A NEW HOME

REFINANCE AN EXISTING MORTGAGE

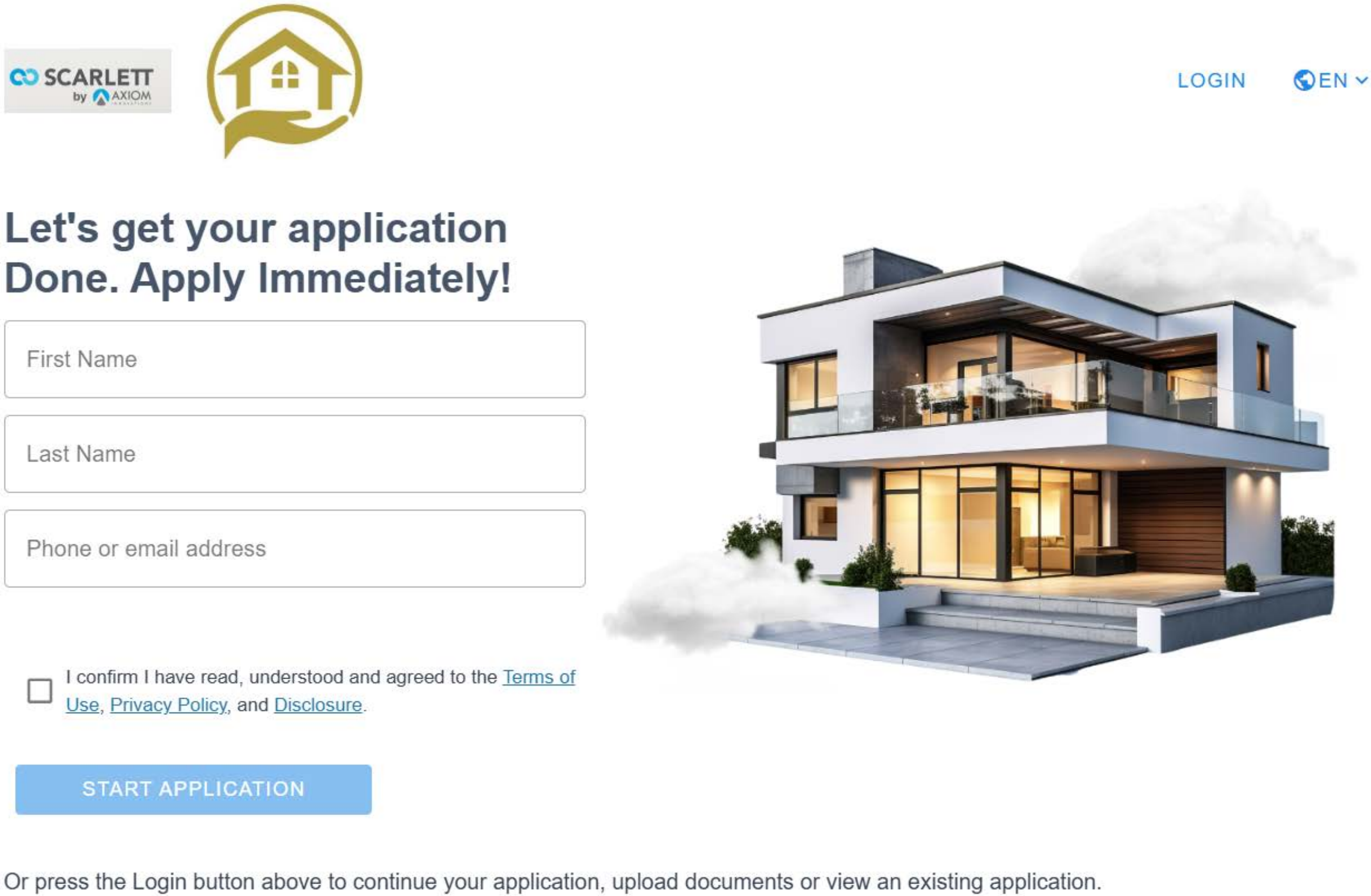
RENEW AN EXISTING MORTGAGE

GET CONSTRUCTION FINANCING

APPLY FOR AN UNSECURED LOAN

3. Login page updated function - Start Application button

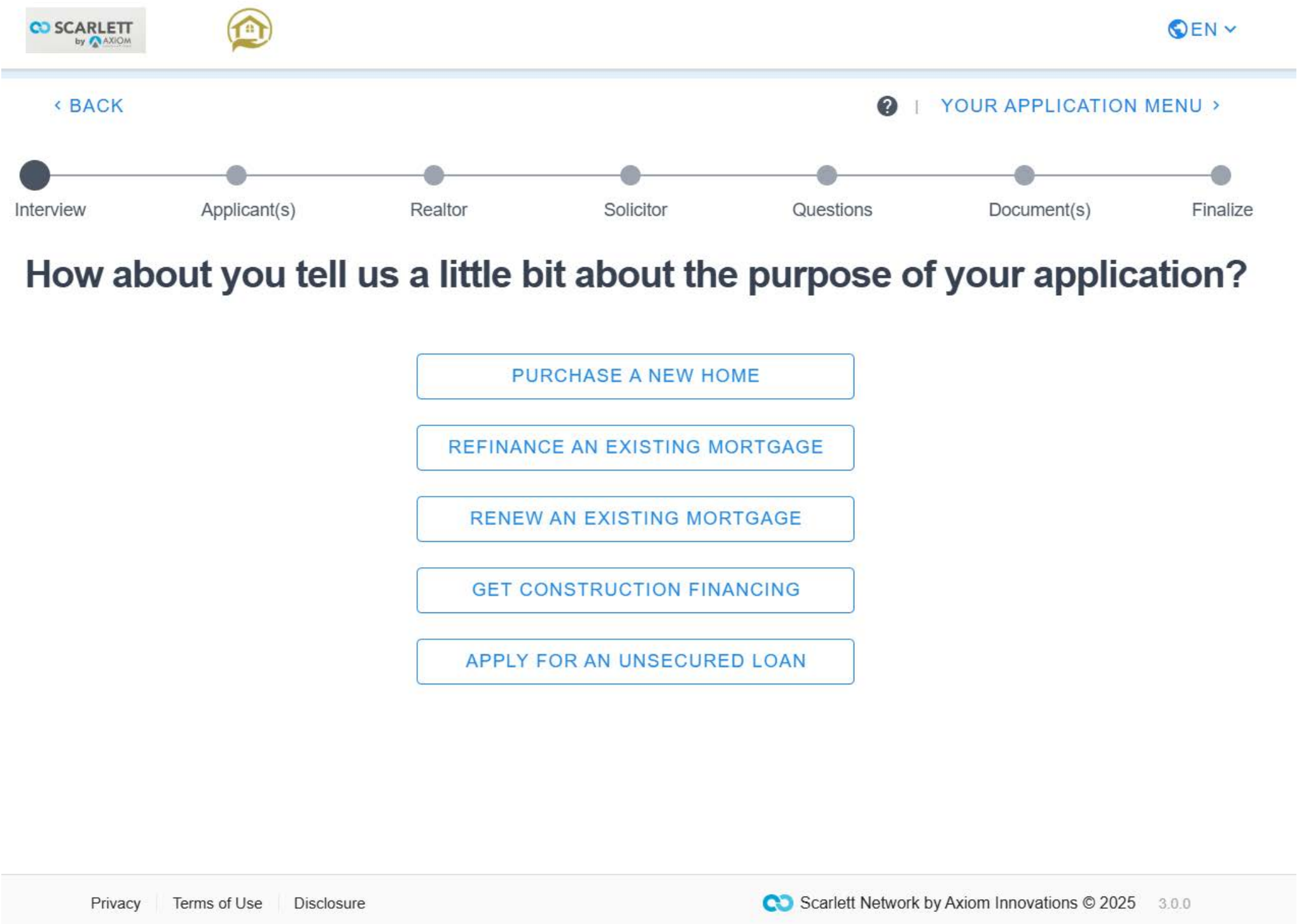
New enhancement improves how Scarlett handles returning applicants on the App 3.0 login page to avoid confusion and accidental duplicate applications.



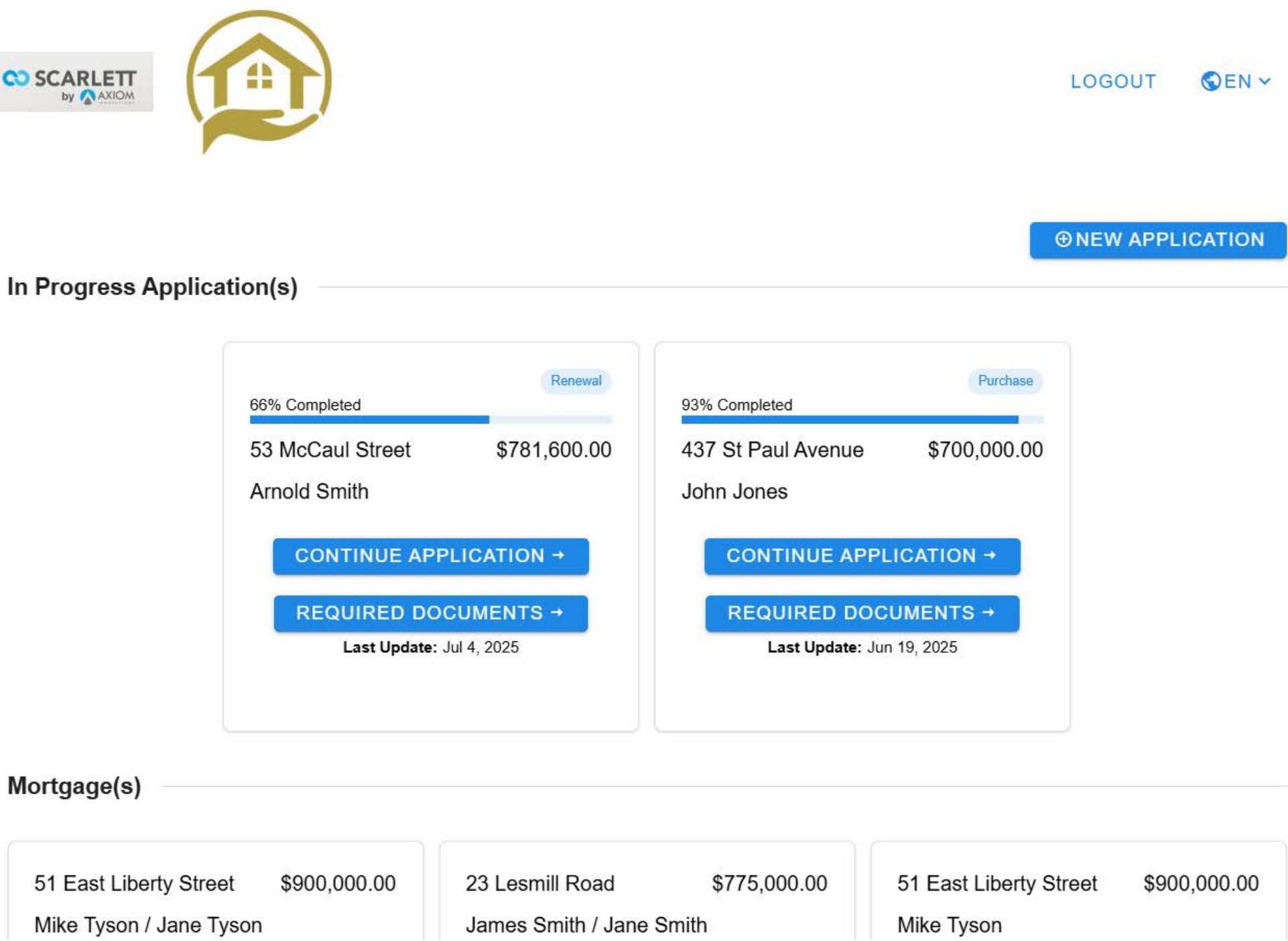
Returning applicants often clicked the **Start Application** button when attempting to review or update an existing file, which unintentionally created a new application instead of continuing their existing one.

With this update:

First time users: {email address or phone number is not linked to any existing application under the agent’s App 3.0 link} will be directed to the first page of interview section to start a new application



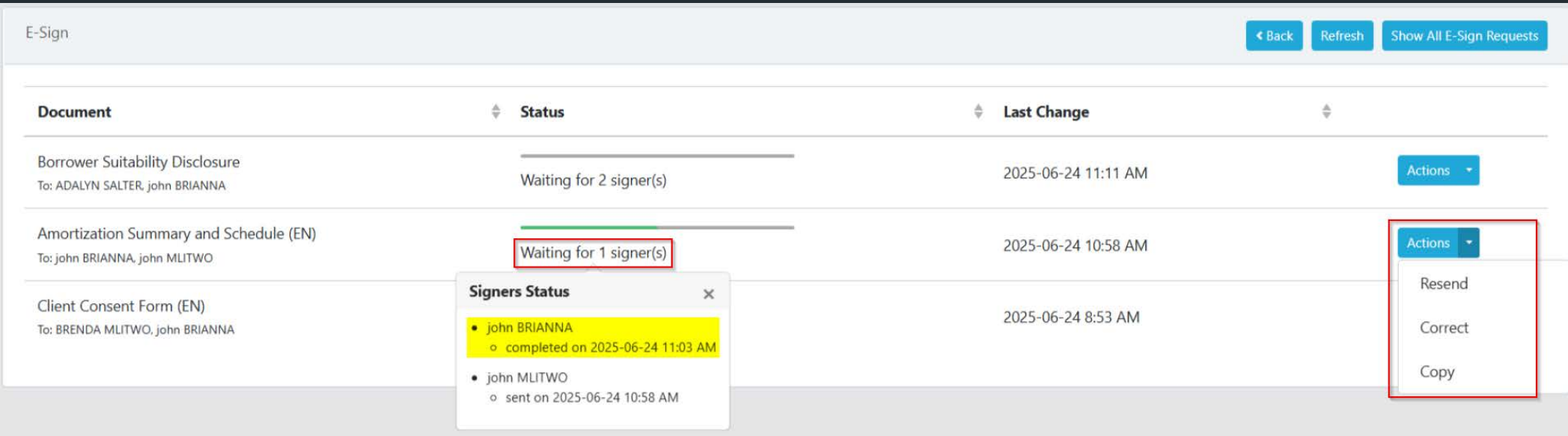
Existing users: {email address or phone number already used to login the agent’s App 3.0 link} will now be redirected to their own dashboard, where they can continue an existing application, action documents or start a new application



4. DocuSign enhancements

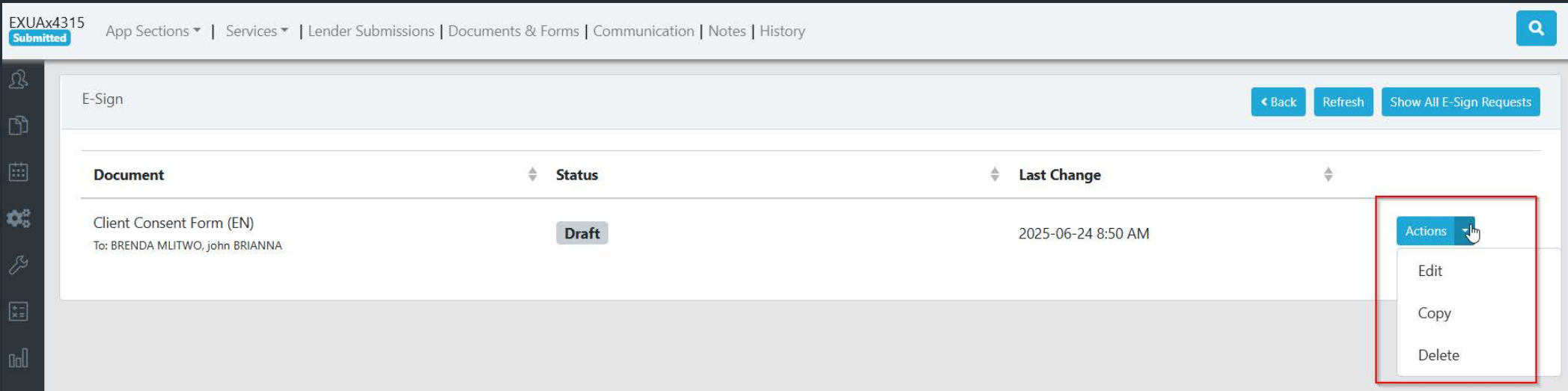
This update introduces several enhancements to the E-Sign Request experience, giving agents more control and flexibility when managing e-signature documents:

Resend Expired Links: Agents can now easily resend an expired signature request link directly from the E-Sign Request page, making it simple to keep the process moving if a client misses their first opportunity.

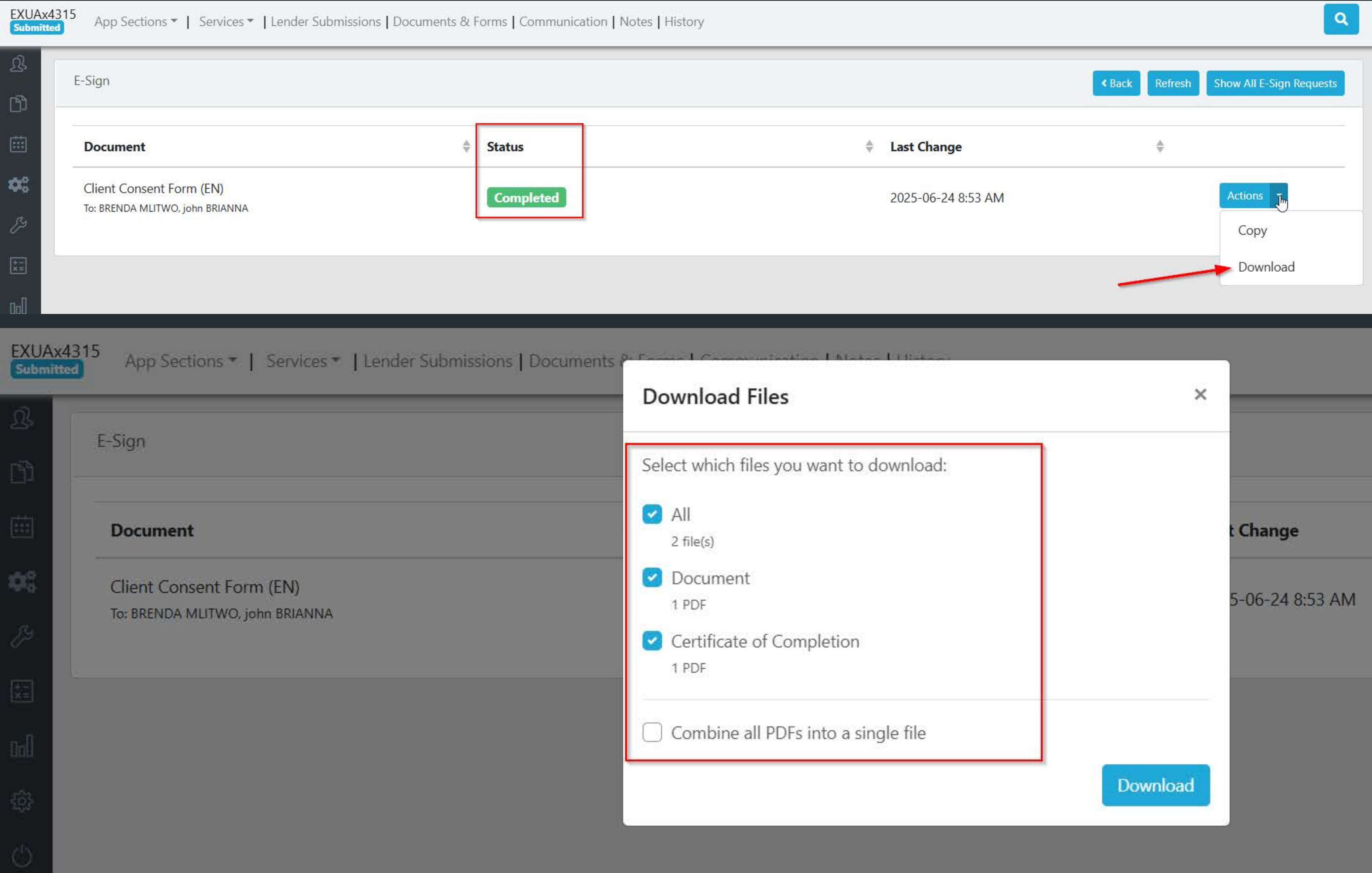


Copy Envelope: A new “Copy Envelope” option has been added, allowing agents to quickly duplicate an existing e-sign package without starting from scratch.

Edit Envelopes: Agents now have the ability to edit an envelope even after a document has been opened, as long as its status is not marked Completed.



Flexible Download Options: A new download window allows agents to choose exactly which components to download from completed or signed files.



5. FINTRAC – Add “Import” function to Equifax PEP & Sanctions report

This update introduces the ability to import results from the Equifax PEP & Sanctions screening within Scarlett deal.

Once the Equifax PEP & Sanctions report is retrieved, an Import button will appear, which can be used to auto-fill relevant FINTRAC fields, helping reduce

EXUAX6994
New

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

PSA Screening (PEP, Sanctions List & Adverse Media)

Not a PEP

Not Sanctioned

Equifax

Screening Date: 2024-12-19

Vendor

Equifax

Import

Screening Date

2024-12-19

Is Applicant/Borrower Politically Exposed

Not Politically Exposed

Does applicant/borrower name appear on any sanctions list?

Yes

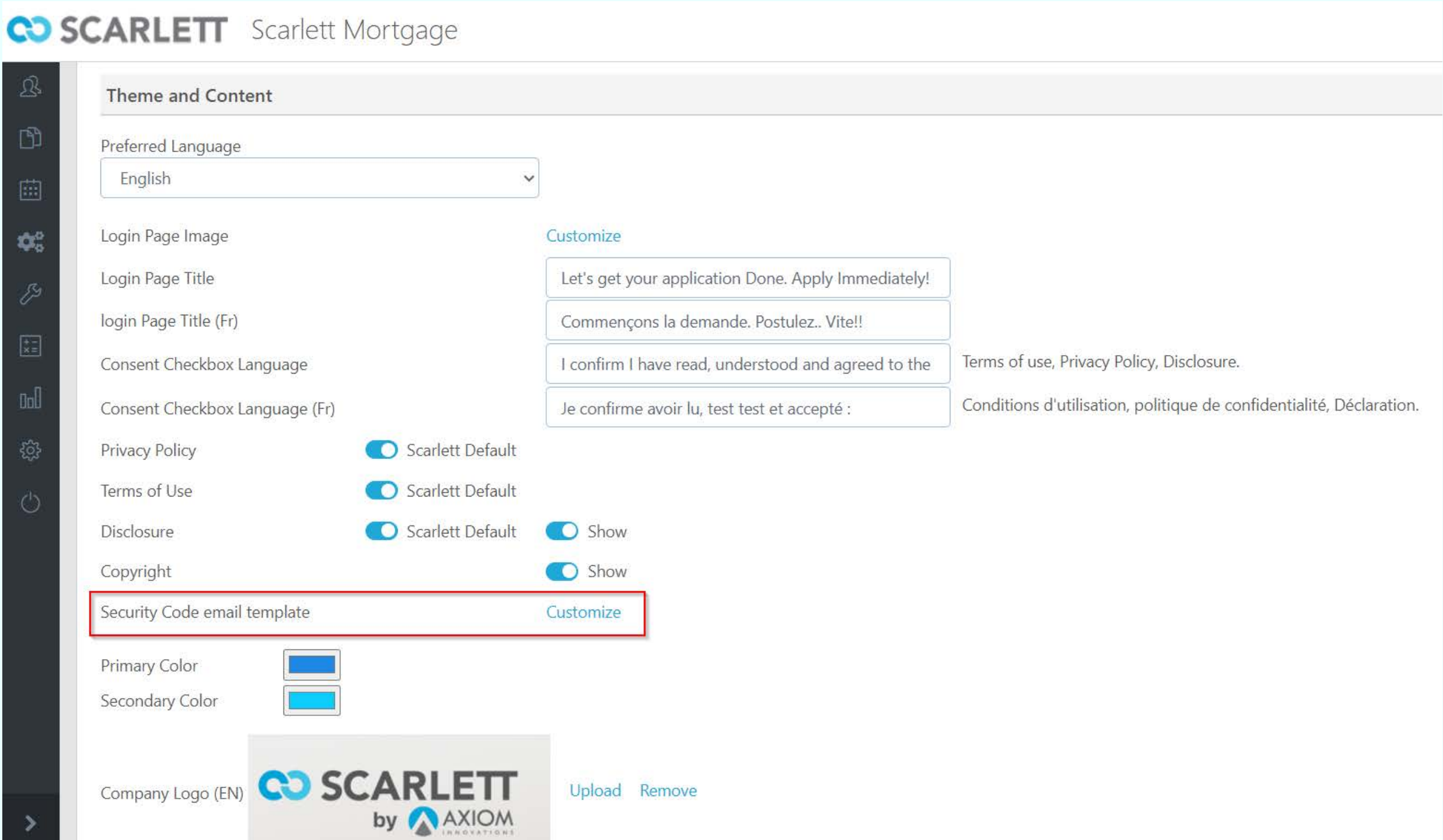
No

Screen Applicant

Service	Request Date	Status	PSA
Equifax - PEP & Sanctions List	Dec-19-2024 12:00:58 PM	Completed	Download
VeriFast - PEP & Sanctions List	Dec 19 2024 12:00:34 PM	Pending	

6. App Settings 3.0 – New feature to edit Security Code content

Scarlett now allows customization of the verification code email, giving agents more control over client communication during the App 3.0 process.



The subject and body of the verification email template (both English & French) can be customized by clicking the “Customize” button in the App 3.0.

Security Code email template

Subject *

Account Verification Code update

Body *

☆ B i A: [text alignment icons] [link icon] [image icon] [plus icon]

Hi,
update

This email was sent automatically in response to starting a new application with Elias Karam. This email is sent for your protection; only you, the recipient of this email, can take the next step to proceed with your application journey.

Your verification code is %Security_Code%. Please enter code provided in order to continue your application.

This message was automatically generated, please do not reply. This email and any attachments have been scanned for known viruses using multiple scanners. This email message is intended for the named recipient only. It may be privileged and/or confidential. If you are not the named recipient of this email, please notify us immediately

Cancel

Add Code (Merge Field)

Save