

Scarlett Mortgage

Release Notes Version: 2.1.0





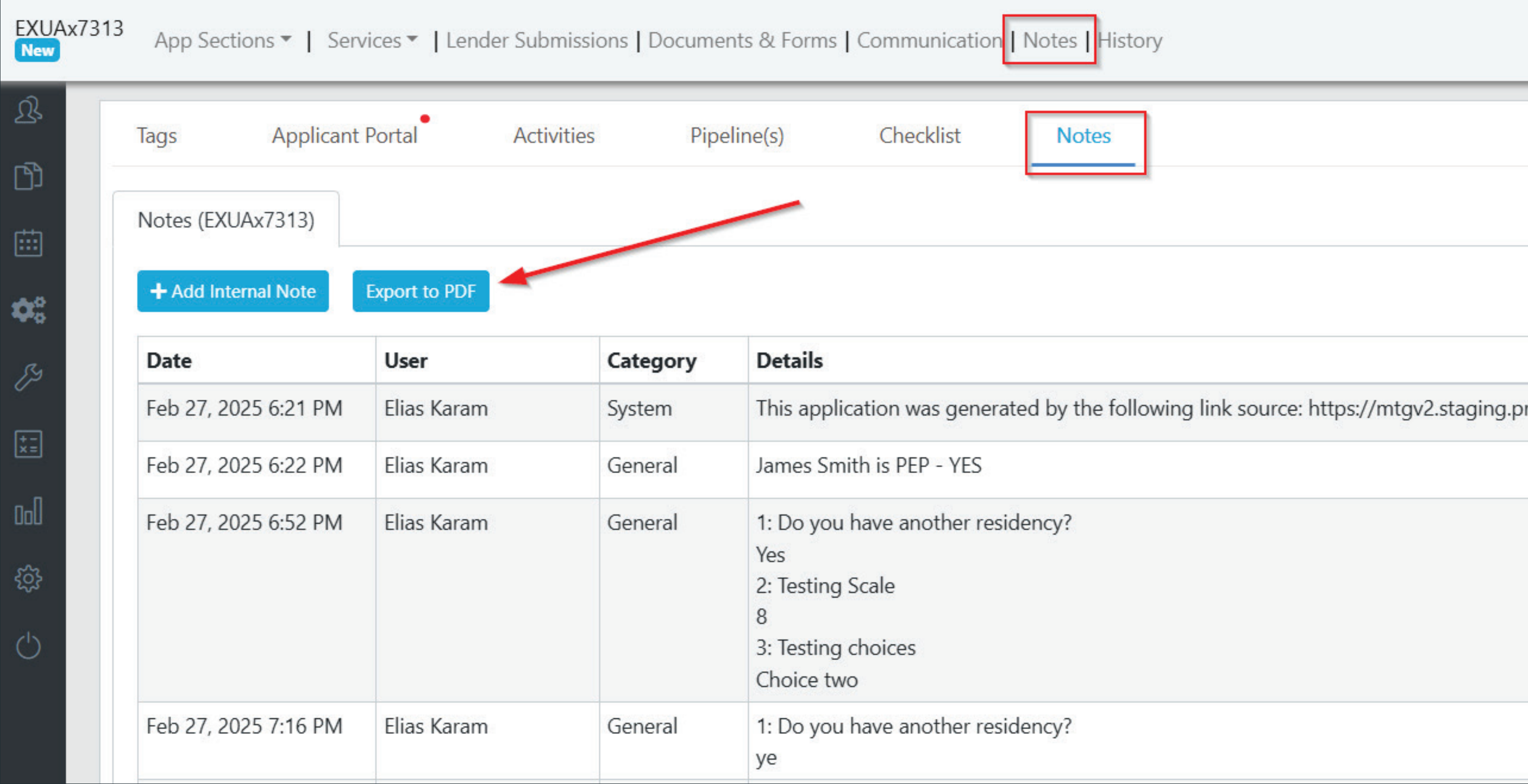
Client Notes Index

- | | |
|----|---|
| 03 | 1. Export Deal Notes to PDF |
| 05 | 2. Select Agent Profile When Generating Forms |
| 06 | 3. FINTRAC - New Incoming System Notifications (IDV Completion) |
| 08 | 4. Clients Now Able to Request a HELOC on the Application |
| 11 | 5. Request Document(s) Update in Leads & Integration with App 3.0 |
| 15 | 6. History Tab Added to Request Documents |
| 16 | 7. Increased Agent Control Over Dashboard Tiles Details |

1. Export Deal Notes to PDF

This update gives agents a quick and professional way to print/share deal notes - improving documentation and compliance tracking.

- A new “**Export to PDF**” button has been added to the Notes section of every deal.



- When selected, the system will generate a PDF containing all internal notes logged on the deal.

Notes

Deal Number: EXUAX7313

Primary Borrower: James Smith

Subject Property Address: 303-23 Lesmill Road North York Ontario M3B 3P6 Canada

Agent on Deal: Elie Moukhaiber

Printed Date: Jul-9-2025 03:33:02 PM

Date	User	Category	Details
2025-02-27 11:21:28 PM	Elias Karam	System	This application was generated by the following link source: https://mtgv2.staging.preprod-axiom.com/Elias_Karam
2025-02-27 11:22:12 PM	Elias Karam	General	James Smith is PEP - YES
2025-02-27 11:52:43 PM	Elias Karam	General	1: Do you have another residency? Yes 2: Testing Scale 8 3: Testing choices Choice two
2025-02-28 12:16:40 AM	Elias Karam	General	1: Do you have another residency? ye
2025-02-28 2:03:04 AM	Elias Karam	General	Mickey Mouse is PEP - NO
2025-06-19 3:56:06 PM	Elias Karam	General	Testing Notes owner on Online App V1
2025-07-07 3:47:22 PM	Elias Karam		eetetete

2. Select Agent Profile When Generating Forms

This update adds a new dropdown that allows agents with multiple profiles to select the appropriate Agent Profile when generating forms - ensuring the correct profile details are automatically filled in.

der Submissions | Documents & Forms | Communication | Notes | History

Generate New Form

Document Type *

Select...

Agent Profile *

IND-Lionsgate Financial Group-BR1
Elias Karam (EXUA-KARAME)

RMAI-360 Lending Solutions
Elie Karam (-KARAME)

Cancel

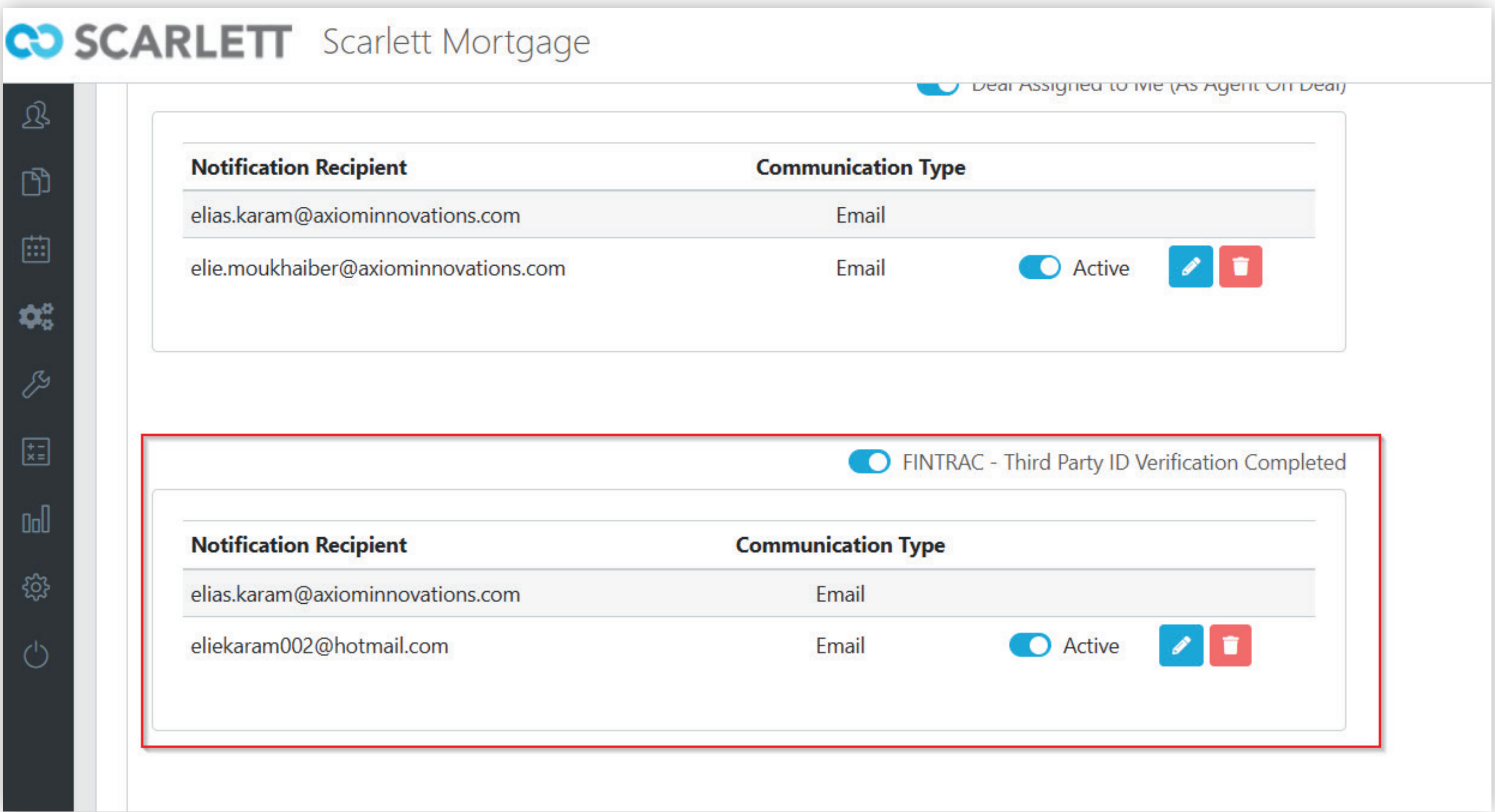
Next

3. FINTRAC - New Incoming System Notifications (IDV Completion)

A new system notification has been added to alert users when an applicant completes their third-party ID verification for FINTRAC compliance.

How it works:
Under **Email Accounts** → **Incoming System Notifications**

A new toggle option is now available:
“FINTRAC – Third Party ID Verification Completed”



When an applicant completes the ID verification (via Equifax or VeriFast), an email notification will automatically be sent to the assigned notification recipients.

This ensures agents are instantly informed when FINTRAC ID verification is complete.

FINTRAC - Third Party IDV Completed - "John Jones"

SS

Scarlett Support <do-not-reply@preprod-axiom.com>

To

Elias Karam

eliekaram002@hotmail.com

😊

↶

↷

➡

🔗

⋮

10:55 AM

This message is from an external sender outside the organization. Please take caution before engaging with the sender, opening any attachments, or clicking on any links.

Hi Elias Karam,

Please note that applicant John Jones has completed the ID Verification for FINTRAC under EXUAX7892.

To review click on the following link:

<https://mortgage.scarlettnetwork.net/mtg/deal/83372/fintrac>

Scarlett Support

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 and do not copy it or use it for any purpose, nor disclose its contents to any other person.

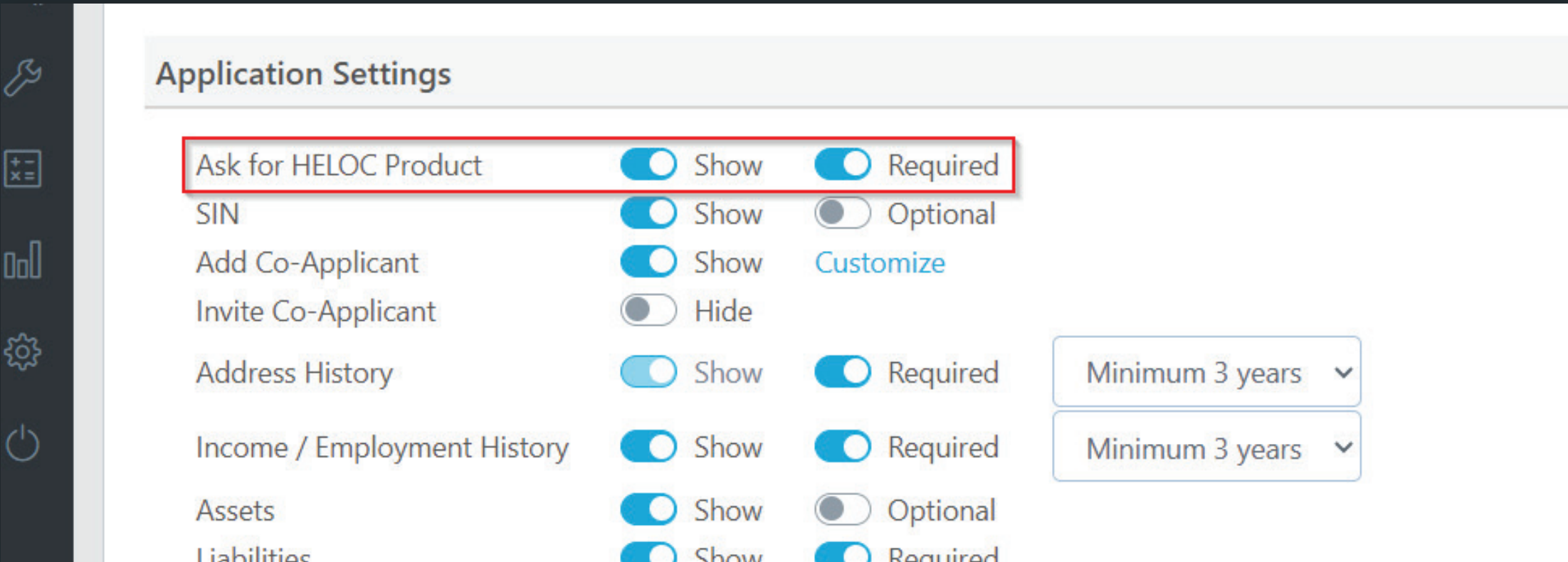
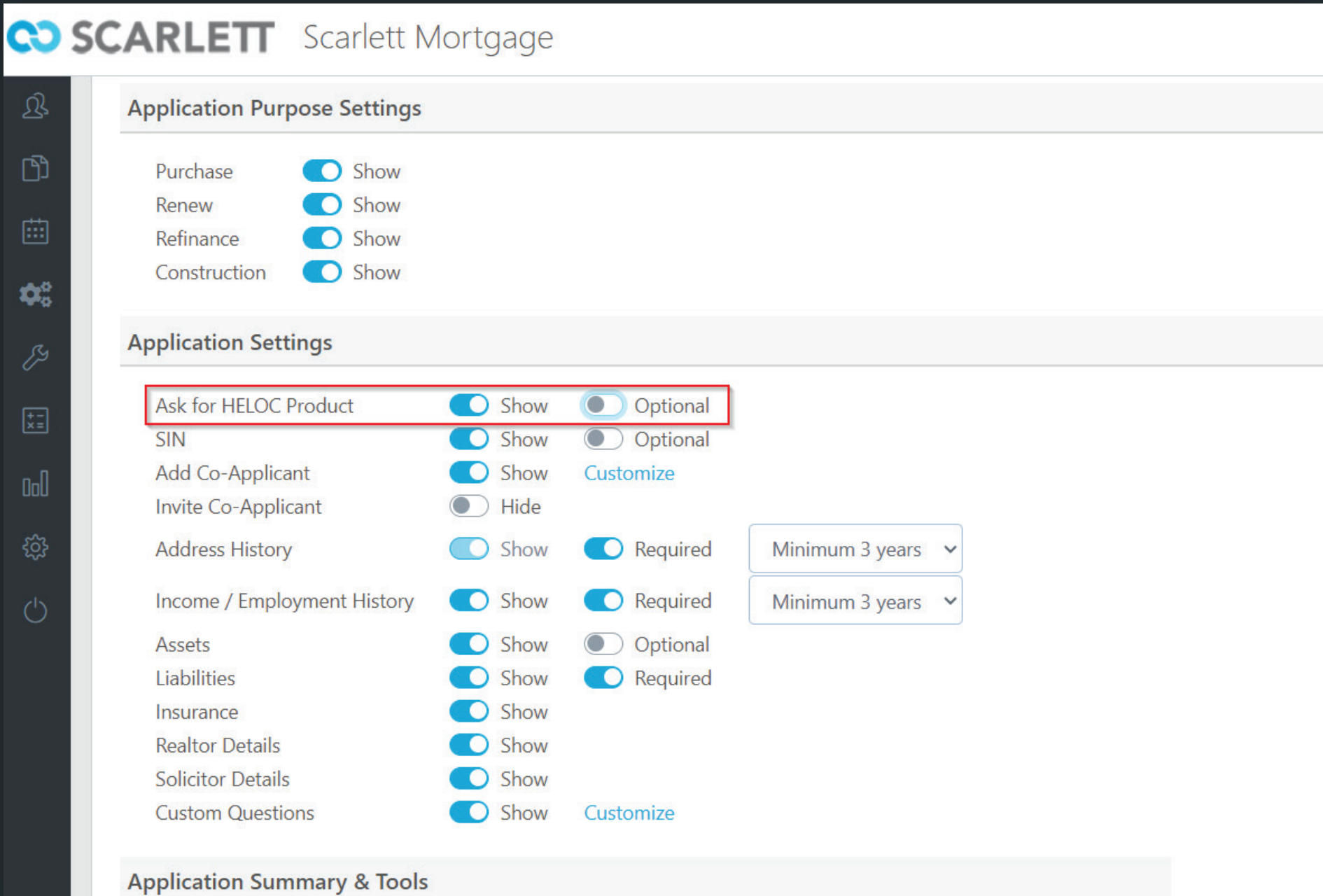
4. Clients Now Able to Request HELOC on the Application

Agents can now capture client interest in a Home Equity Line of Credit (HELOC) directly within the Client Application process for **Purchase & Refinance** Option.

A new setting “**Ask for HELOC Product**” is now available under App Settings 3.0:

Agents can choose to:

- **Show** or **Hide** the question
- Set it as **Optional** or **Required**



A new question has been added at the end of the Interview section:

“Are you interested in applying for a Home Equity Line of Credit (HELOC)?”

SCARLETT
by AXIOM

EN

[< BACK](#)

[SAVE & CLOSE](#)

?

 | [YOUR APPLICATION MENU](#) >

●

●

●

●

●

●

●

●

Interview

Subject Property

Applicant(s)

Realtor

Solicitor

Questions

Document(s)

Finalize

Are you interested in applying for a Home Equity Line of Credit (HELOC)?

YES

NO

< BACK

SKIP >

SCARLETT
by AXIOM

EN

[< BACK](#)

[SAVE & CLOSE](#)

?

 | [YOUR APPLICATION MENU](#) >

●

●

●

●

●

●

●

●

Interview

Subject Property

Applicant(s)

Realtor

Solicitor

Questions

Document(s)

Finalize

Are you interested in applying for a Home Equity Line of Credit (HELOC)?

YES

NO

< BACK

If the applicant selects ‘YES’,

- HELOC Flag is Enabled in the application created on Scarlett MTG:

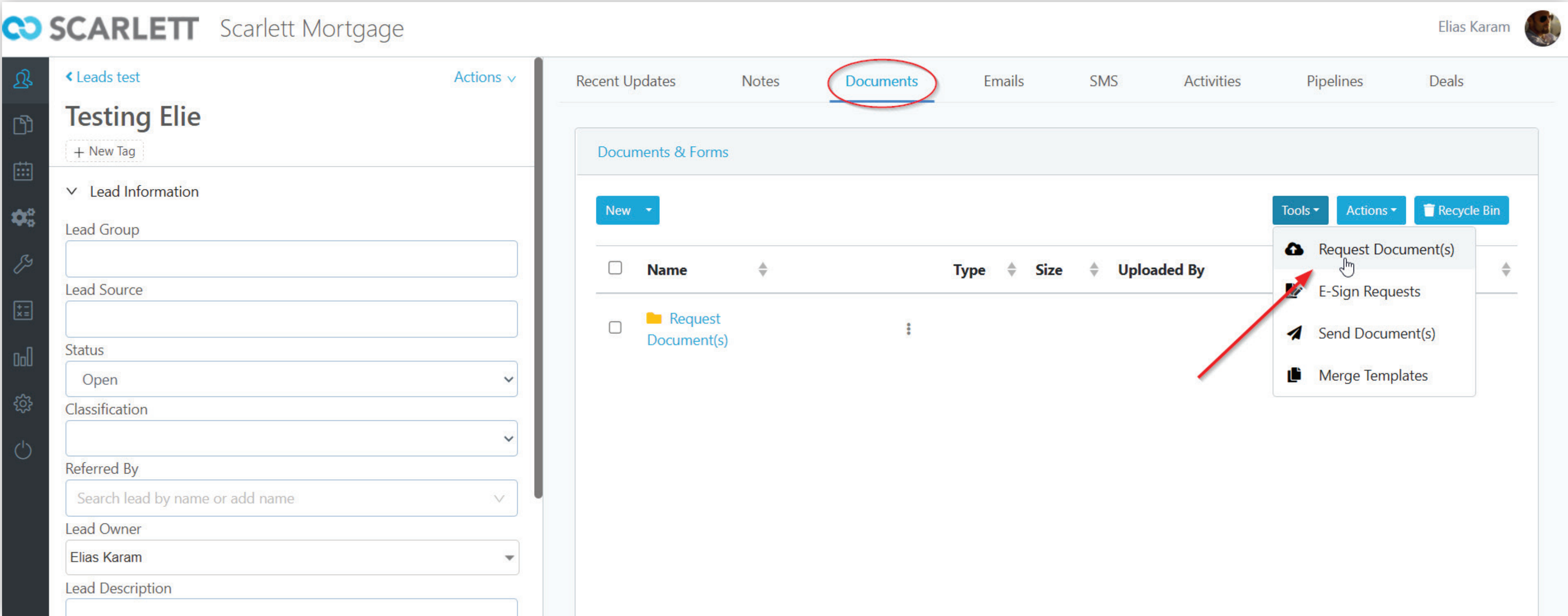
- The response is automatically logged in the deal’s Notes section

Date	User	Category	Details
Jul 8, 2025 4:00 PM	Elias Karam	System	This application was generated by the following link source: https://mtgv2.staging.preprod-axiom.com/Elias_Karam
Jul 8, 2025 4:02 PM	Elias Karam	General	John Jones is PEP - YES
Jul 8, 2025 4:45 PM	Elias Karam	General	Interested in HELOC Product - YES

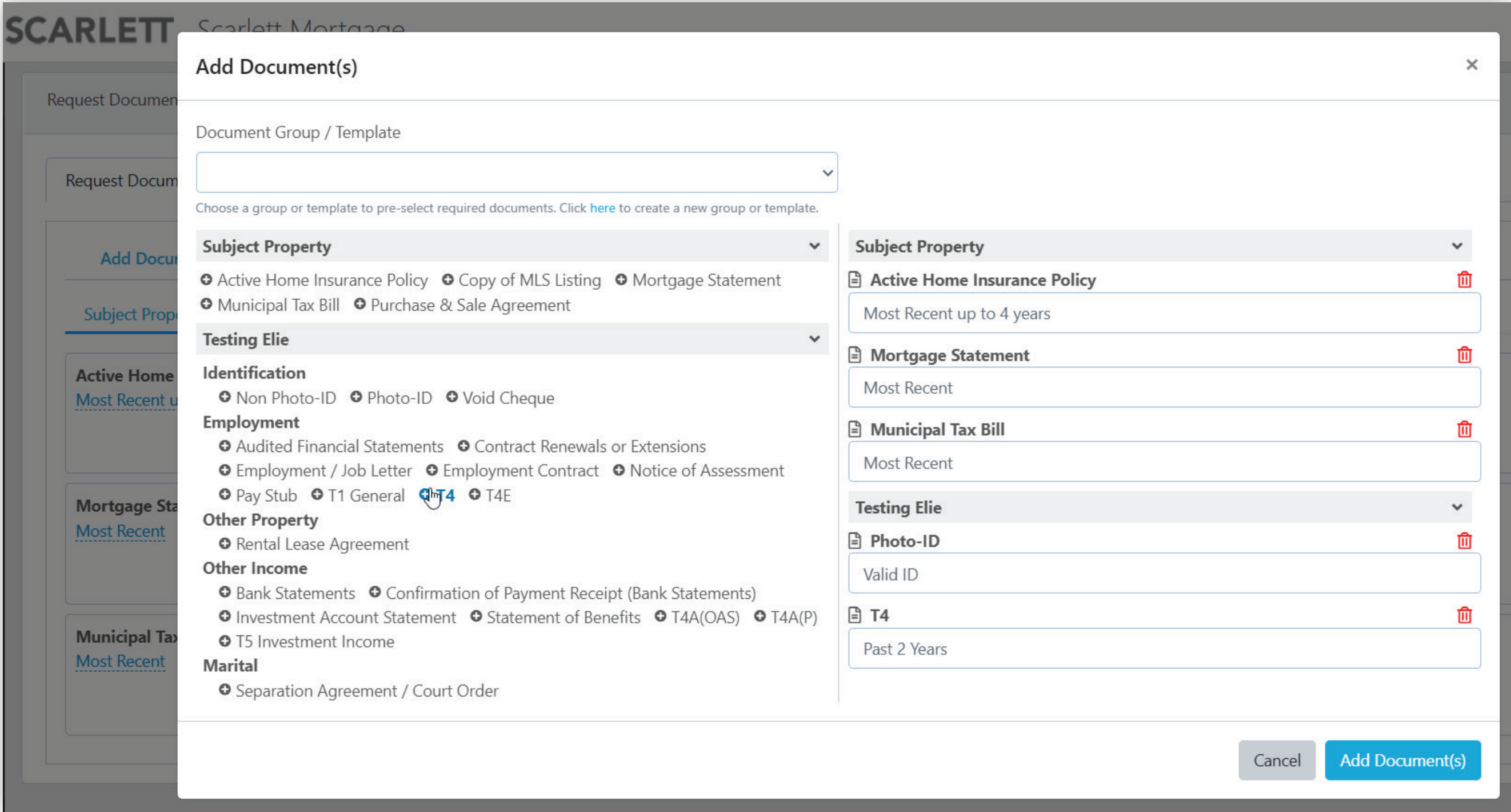
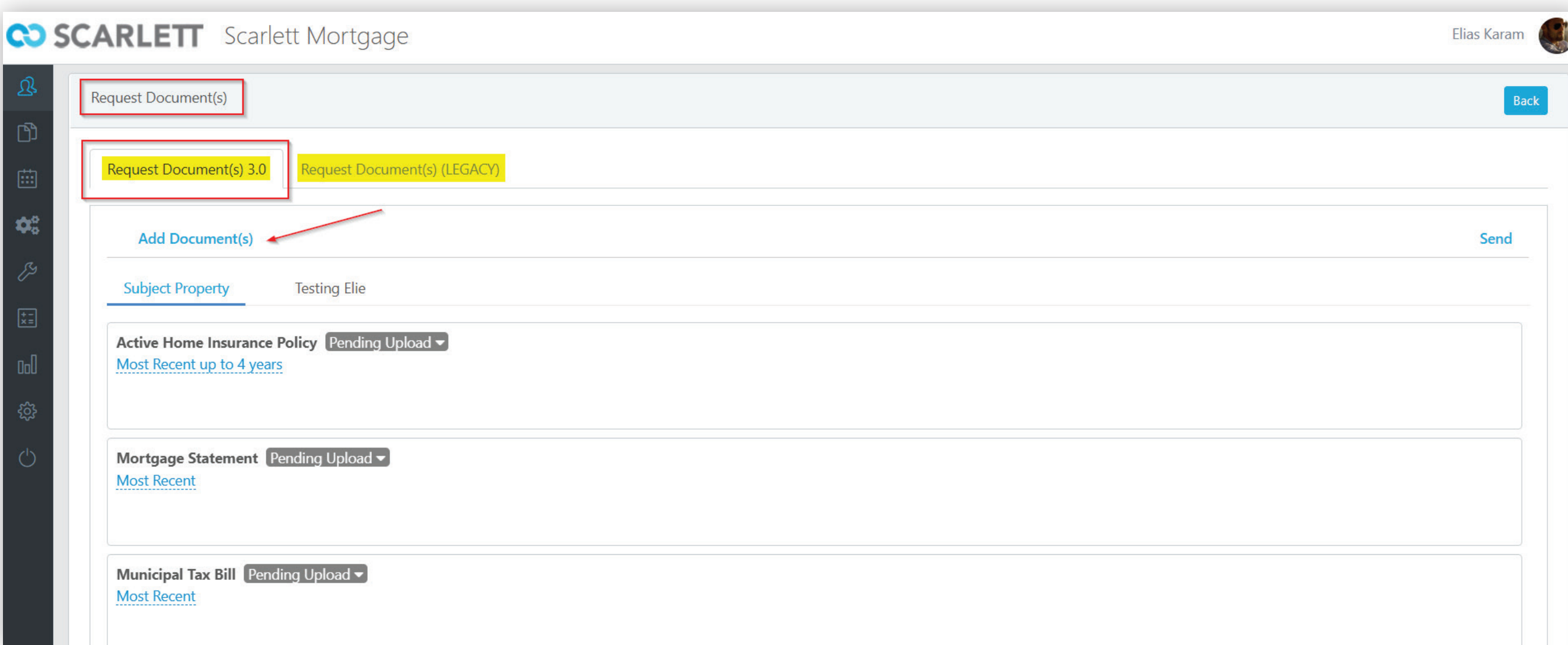
5. Request Document(s) Update in Leads & Integration with App 3.0

The **Request Documents** tool within the **Leads module** has been upgraded to fully match the App 3.0 experience - giving agents a modern, seamless document collection workflow directly from a lead profile.

How it works:
Under any **Lead** → **Documents** tab, agents can now access:
Tools → Request Document(s)



Select ‘Request Document (s) 3.0’
tab → click on ‘Add Document(s)’
will open the list of documents (mirrors
the layout, behaviour and flexibility of
document request within Apps & Deals)



Once a document request is sent from the lead, the applicant will see it in their **App 3.0 portal** under a new section called **‘Future Application Document(s)’**

This allows clients to submit documents securely - even before starting a formal application - ensuring all uploaded files are stored in one unified experience.

Mortgage(s)

23 Lesmill Road\$775,000.00

James Applicant / James Smith

1 year

Total Principal (On Maturity Date): \$0.00 (0%)

CONTINUE APPLICATION →

APP SUMMARY AND TOOLS →

Closing Date: May 18, 2025

Future Application Document(s)

Vin Diesel

REQUIRED DOCUMENTS →



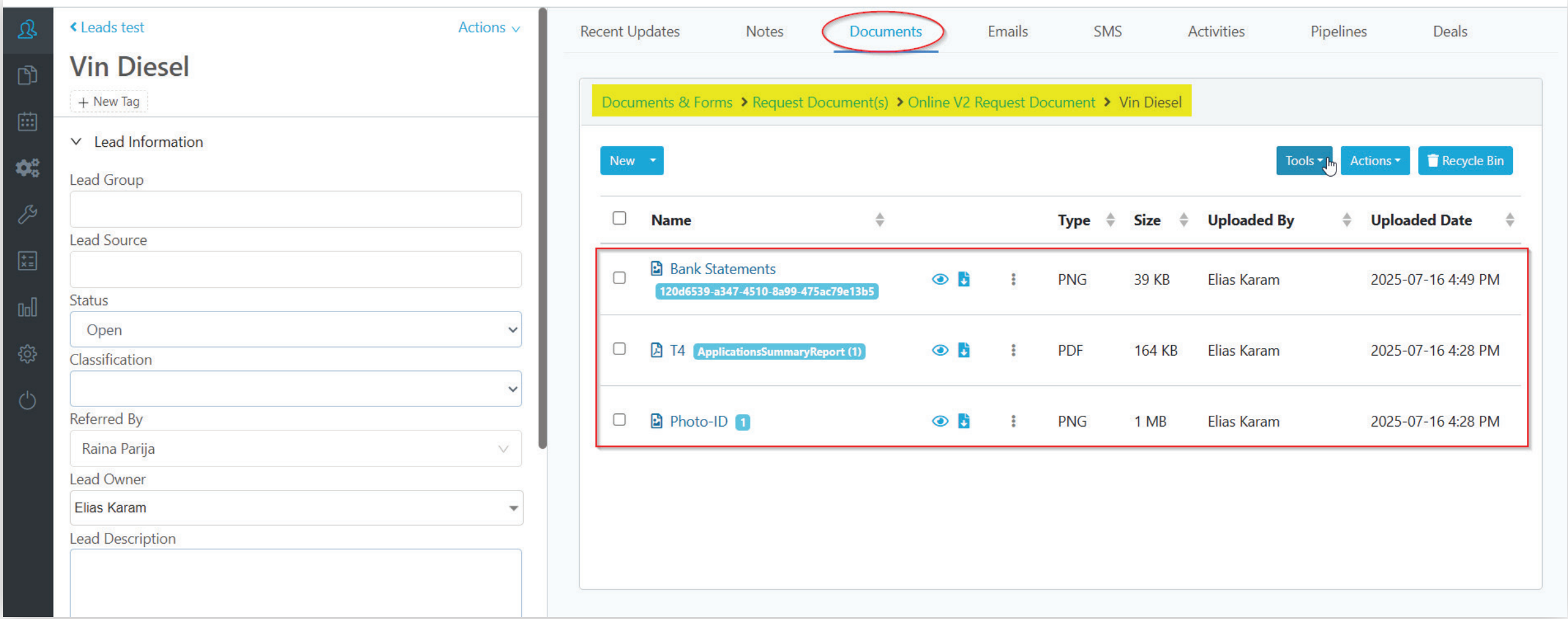
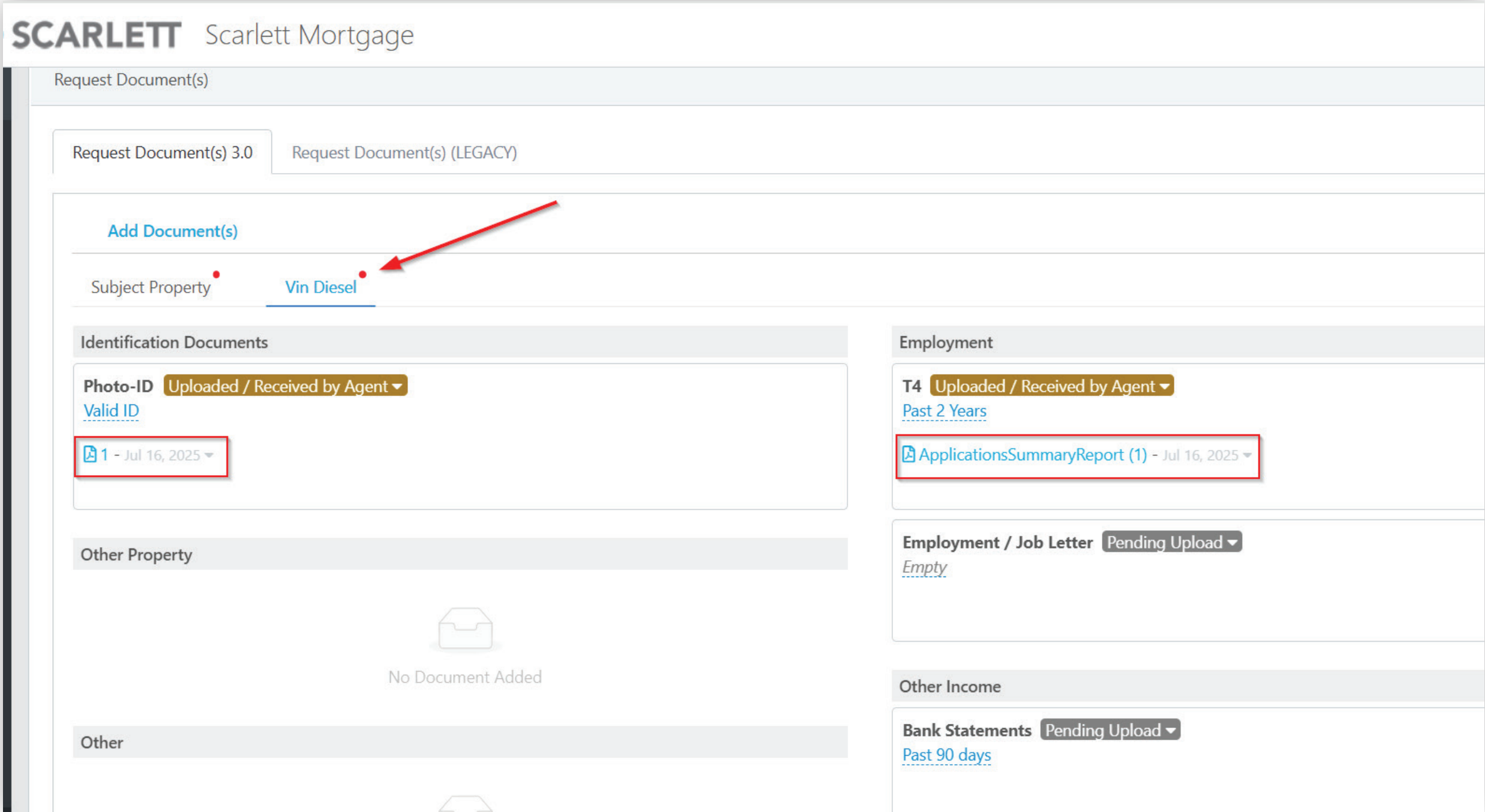
Elias Karam

Project Lead - License: LIC123456

(151) 116-5151

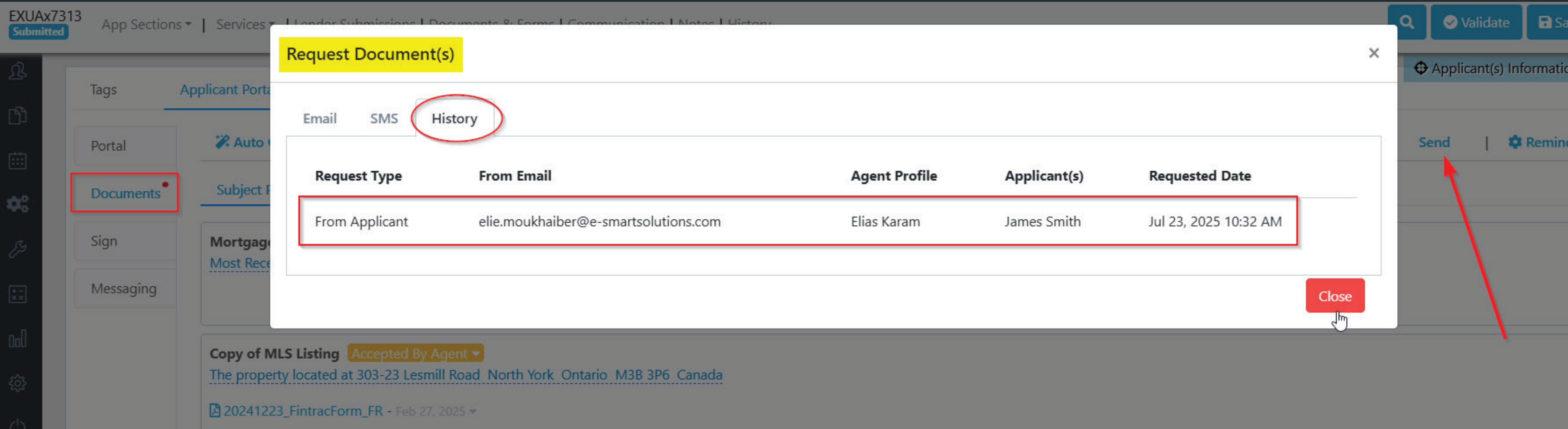
(416) 275-6635

- Any documents uploaded by the applicant will appear in the
- **Request Document(s) 3.0** interface
 - Sync to the **Documents tab** under the lead profile



6. History Tab Added to Request Documents

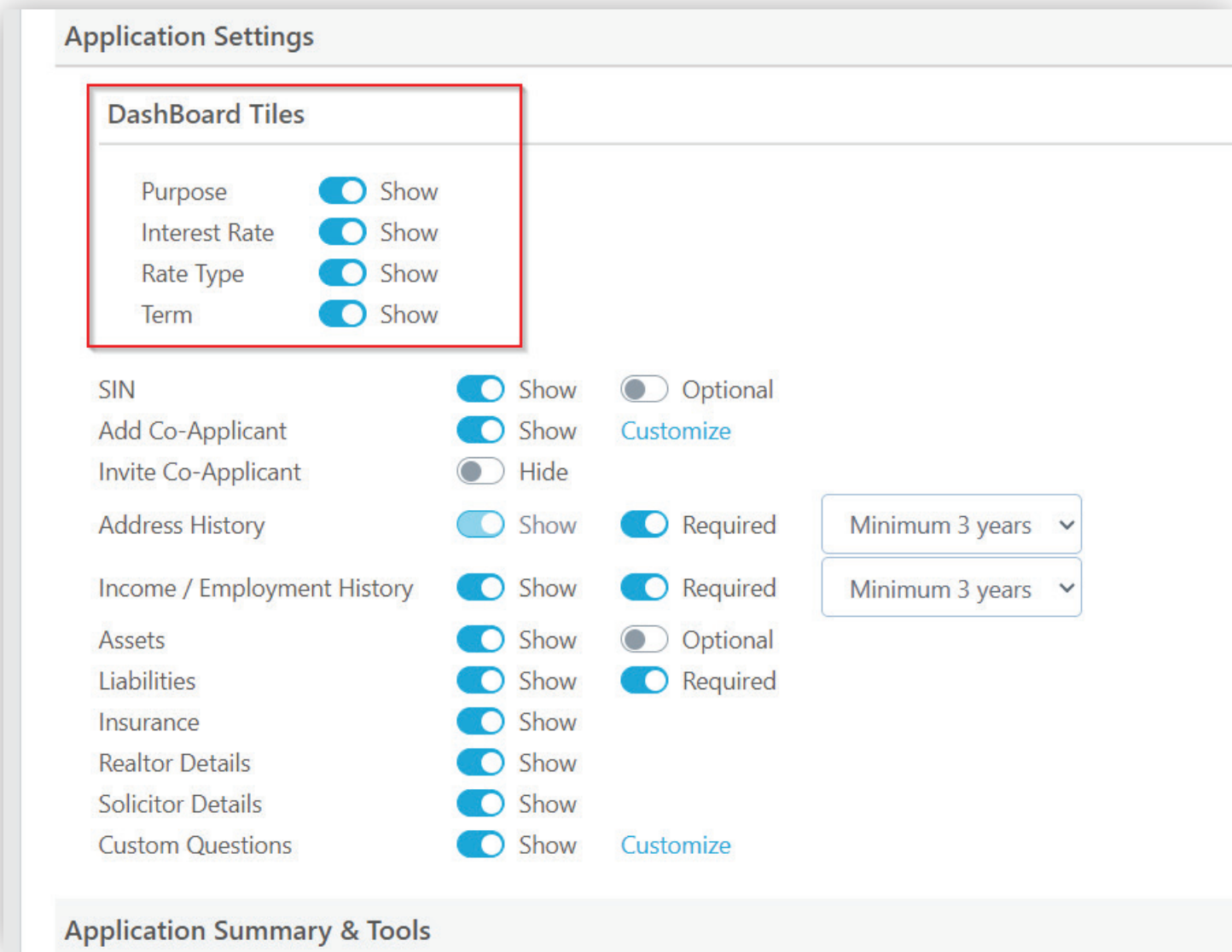
A new “**History**” tab has been added to the **Request Document(s)** window in the Application Portal, making it easy for agents to track all document requests.



7. Increased Agent Control over Dashboard Tiles Details

Agents can now show or hide the following:

- Purpose
- Interest Rate
- Rate Type
- Term



Agents now have more control over what their clients see in the App 3.0 dashboard. A new **Dashboard Tiles** section has been added under App Settings 3.0 → Application Settings, allowing agents to choose which key details are visible on the client-facing tile.

