



Release Notes

Version 1.0.39

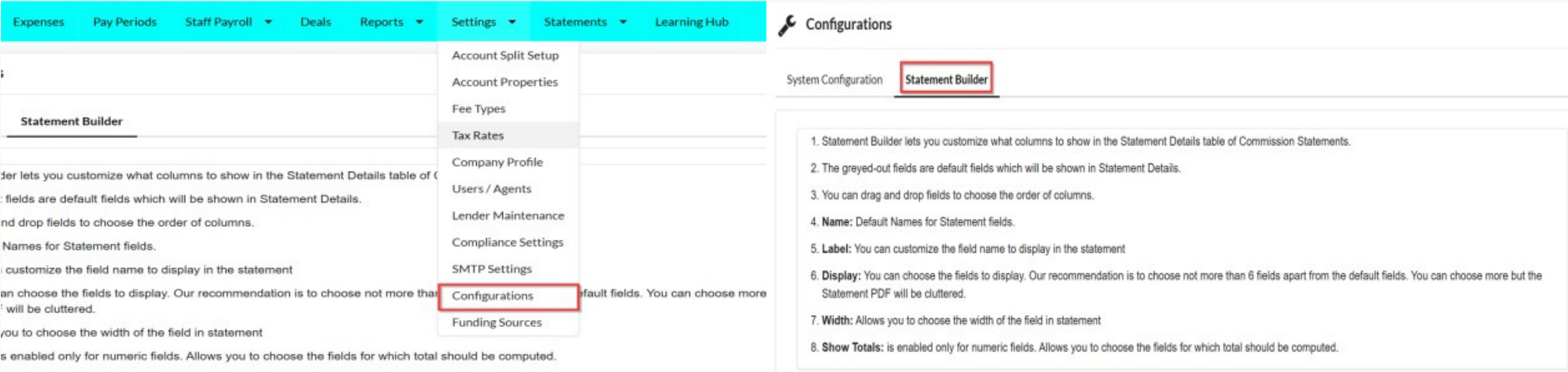


Guide to Use The Statement Builder

Statement Builder allows admins to build their own statement template, giving ability to show required data and hide unnecessary information.

Below are the steps for the statement builder:

1. Go to Settings > Configuration > Click Statement Builder.



2. Read through & follow the instructions provided to customise the tables in your user's commission statements.

Configurations

System Configuration **Statement Builder**

1. Statement Builder lets you customize what columns to show in the Statement Details table of Commission Statements.
2. The greyed-out fields are default fields which will be shown in Statement Details.
3. You can drag and drop fields to choose the order of columns.
4. **Name:** Default Names for Statement fields.
5. **Label:** You can customize the field name to display in the statement
6. **Display:** You can choose the fields to display. Our recommendation is to choose not more than 6 fields apart from the default fields. You can choose more but the Statement PDF will be cluttered.
7. **Width:** Allows you to choose the width of the field in statement
8. **Show Totals:** is enabled only for numeric fields. Allows you to choose the fields for which total should be computed.

3. At the bottom of the page, options are available for the following options.

a. Choose your Statement color:

Default color will display statements in Scarlett Blue. **Favorite colour** will display the color chosen and setup under **SETTINGS > COMPANY PROFILE> FAVORITE COLOR**.

b. Hide /Empty Tables:

Enabling this will hide tables in the statements that have no content to display.

c. Disable Old Statements:

Enabling this will remove access to the old **Commission Statements in the Statements dropdown** and only give access to the new **Commission Statements (NEW)** under statements.

13	Closing Date	Closing Date	☐	Large	☐	
14	Split to HO	Split to HO	☐	Large	☒	?
15	Allocation Description	Description	☐	Large	☐	?
16	Amount / Commission / Net Paid	Amount Paid	☒	Large	☒	?

Additional Settings

Choose your statement color

☒

Favorite Color

☐

Default Color

Hide Empty Tables

☐

Disable Old Statements

☐

4. Once all required selections are made and commission statement is built, click on **Preview** to view how the statement will be displayed if saved.

7. **Width:** Allows you to choose the width of the field in statement

8. **Show Totals:** is enabled only for numeric fields. Allows you to choose the fields for which total should be computed.

Preview

Save & PublishUn-Publish

Finder Fee | Volume Bonus | Other Income

Order	Name	Label (Max 20)	Display	Width	Show Totals	Description
1	Paycode	Paycode	☒	Medium	☐	

5. Once the Statement built is confirmed click **Save & Publish**.

7. **Width:** Allows you to choose the width of the field in statement

8. **Show Totals:** is enabled only for numeric fields. Allows you to choose the fields for which total should be computed.

Preview

Save & PublishUn-Publish

Finder Fee | Volume Bonus | Other Income

Order	Name	Label (Max 20)	Display	Width	Show Totals	Description
1	Paycode	Paycode	☒	Medium	☐	
2	Deal ID	Deal ID	☒	Medium	☐	

6. This will enable agents to view **Commission Statement (NEW)** under their Statement dropdown.

7, To disable Commission Statement (NEW) from showing up for the Agents click on **Unpublish**.

7. **Width:** Allows you to choose the width of the field in statement

8. **Show Totals:** is enabled only for numeric fields. Allows you to choose the fields for which total should be computed.

Preview

Save & Publish

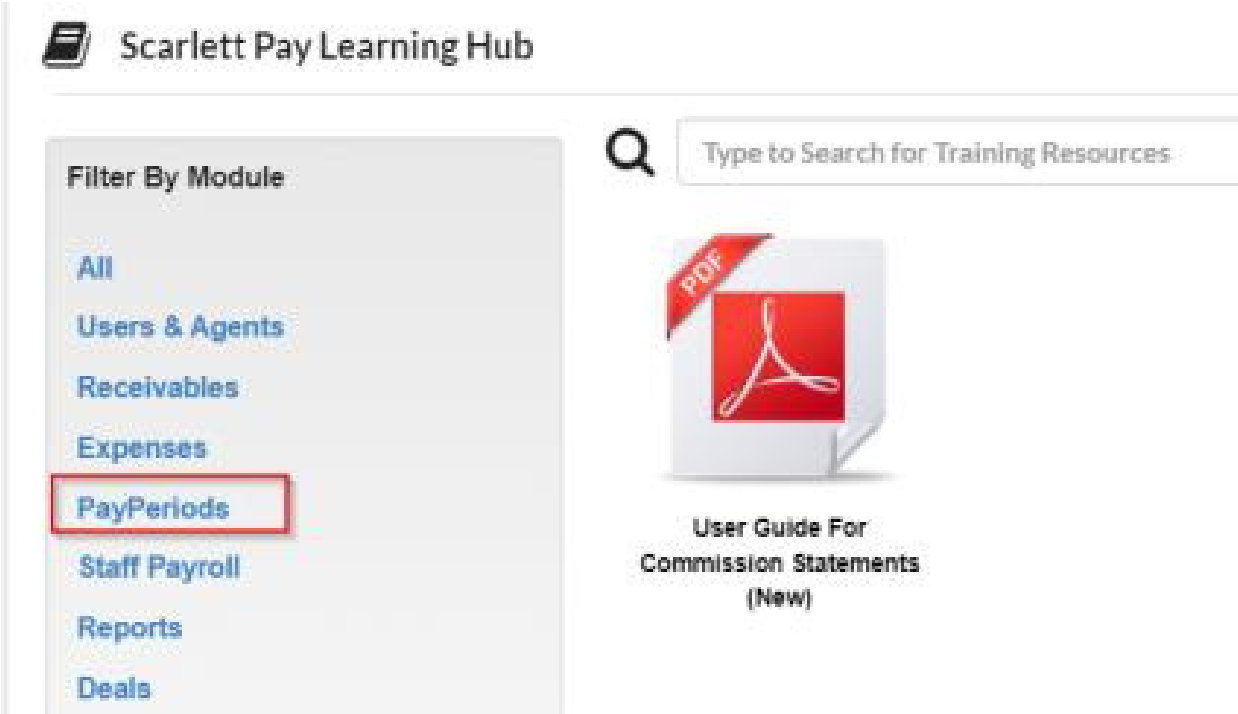
Un-Publish

Finder Fee | Volume Bonus | Other Income

Order	Name	Label (Max 20)	Display	Width	Show Totals	Description
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****Once the New Commission Statement is published to Agents, you can send the Module highlighted below for their reference.**

****IN TIME TO COME THE “OLD” COMMISSION STATEMENT WILL BE DECOMMISSIONED AND REPLACED BY THE NEW COMMISSION STATEMENT****



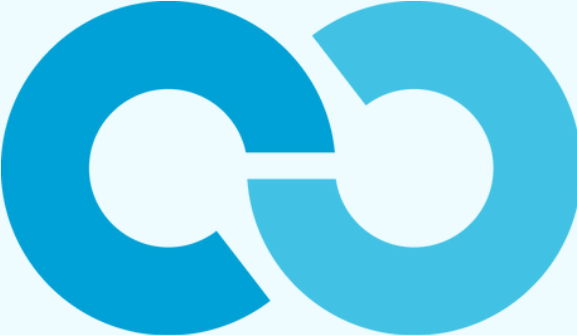
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☎ 1.855.561.4399

✉ support@scarlettnetwork.com

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