

Agent Deal/Compliance/Statement View

Searching for Deals

The Deals Menu opens the interface to access your deal information.

1. The section above (green) allows to **search for deals** using various criteria.
2. The section below (orange) **populates search results** depending on the criteria used.
3. TRS Views on the left-hand side (purple) **opens a filtered view of all deals residing within that status.**

The screenshot shows the 'MORTGAGE' interface with a top navigation bar containing 'Deals' and 'Statements'. On the left, a 'TRS Views' menu is highlighted with a purple box, listing various deal statuses with corresponding counts. The main area is divided into two sections: a search form (green border) and a search results table (orange border). The search form includes fields for Deal ID, Lender, Team, Client Name, Lender Ref.#, Agent, Compliance Status, Agent Account, Property Address, and Closing Date. The search results table displays columns for Deal ID, Fee Paid, Paid, Agent Account, Client 1, Client 2, Address, Funded Amt, Compliance Status, and Lender. A red arrow points to the 'Deal ID' column in the results table.

Editing and Interacting with Deals

Click on the **Deal ID** to open a window that displays your deals information. This will also be the **place to provide Compliance Documents and other supporting functionalities.**

This screenshot is identical to the previous one, but with a red arrow pointing to the 'Deal ID' 'MISC-123' in the search results table, indicating the action to click on it.

1. The Details tab contains all information pertaining to the deal.
 - a. Clicking on the **Edit button** will allow agents to **edit information displayed.** (Some fields will be greyed out and only available for admins to use)

Agent Deal/Compliance/Statement View

- b. The **Submit to Compliance** button allows agents to **submit this deal for compliance review**. (Recommended to use under Compliance Checklist tab)

MISC-123 Open(Saved) ✕

Details Compliance Checklist Notes History Participants

Edit **Submit to Compliance** CC Email Addresses Close

Deal Details

Account Agent On Deal Agent Branch Assigned To	PERA1 PERSON A DEMO OFFICE Compliance Admin Testing	Compliance Status Deal Status Mortgage Status Origination Account Origination Account Type	Open(Saved) In Progress In Progress Not Specified
--	--	--	--

Commission Request

Pay To: PERA1
Commission Comments

Borrower & Co-Borrower Details

First Name Last Name Date Of Birth Phone Email First Time Buyer Borrower Self Employed	sadasd test 2023/04/27 (416) 500-7999 <input type="checkbox"/> No	First Name Last Name Date Of Birth Phone Email Co-Borrower Self Employed	No
--	--	---	----

Property Address

Street # & Name City Postal Code	3608 Fortune Place PEI I5M 718	Unit # Province Property Usage	Ontario Primary Residence
--	--------------------------------------	--------------------------------------	------------------------------

2. The Compliance Checklist tab is the area to upload supporting documents to mark a deal compliant.
- Expanding the drop down list for **Checklist Group** will provide different checklist packages depending on the **deal purpose/type**.
 - Agents can add documents in 3 ways; Drag and Drop files, Click to Upload files, Import files from Scarlett Mortgage (**only available if the brokerage uses Scarlett Mortgage**).

MISC-123 Open(Saved)

Details Compliance Checklist Notes History Participants

☰ Checklist Group **Submit to Compliance** CC Email Addresses

Ontario Audit Documents
Ontario Refinance
Ontario Purchase ⓘ Pending

Drop file(s) here or click to Upload

Reasons: Notes:

↓ Know Your Investor Pending

Drop file(s) here or click to Upload

Reasons: Notes:

3. The Notes tab can be used to **relay messages back and forth** regarding required documents or finalization.
- The New button is used in creating new notes. Users will be able to choose whether they want to notify others or keep it as an internal note.

Agent Deal/Compliance/Statement View

b. Each line item is a separate note added and can be viewed or replied to.

MISC-123 Open(Saved)

Details Compliance Checklist **Notes** History Participants

New

Note	Note Type	Date & Time	User	
Submitted all compliance docs	External	2023/04/27 17:30:10	C.Dom	View Reply

Displaying items 1 - 1 of 1

Close