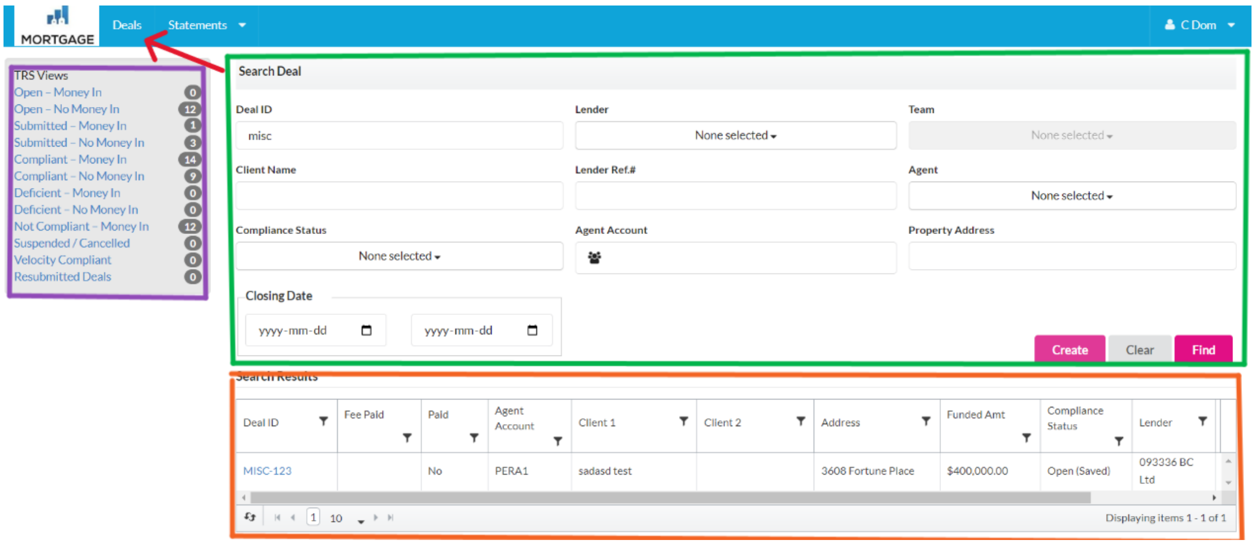
# Agent Deal/Compliance/Statement View

Searching for Deals

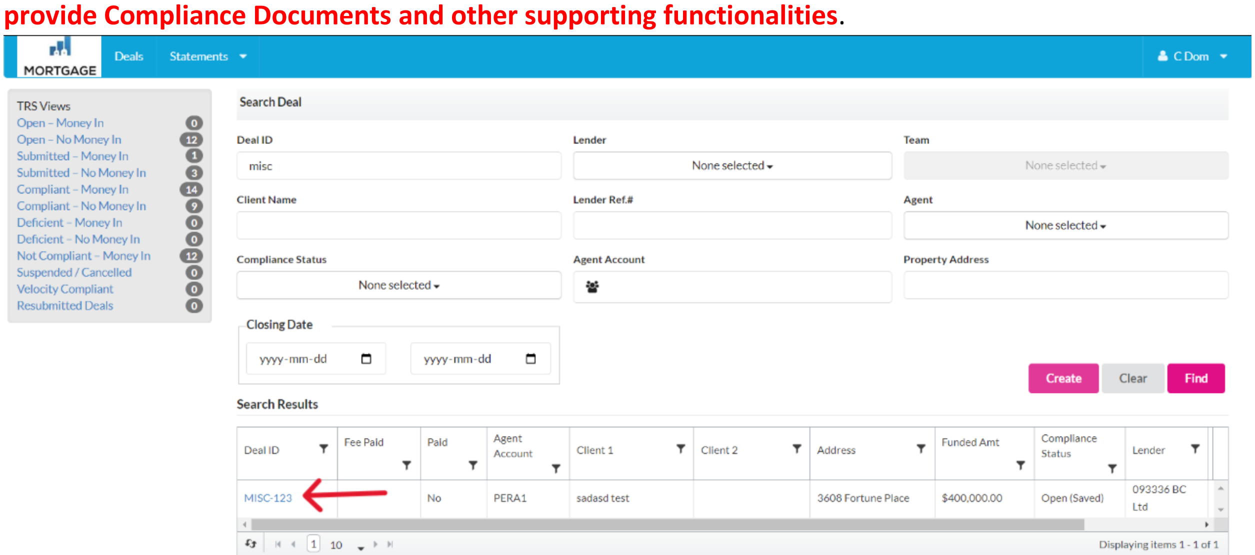
The Deals Menu opens the interface to access your deal information.

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**.




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**.




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)**

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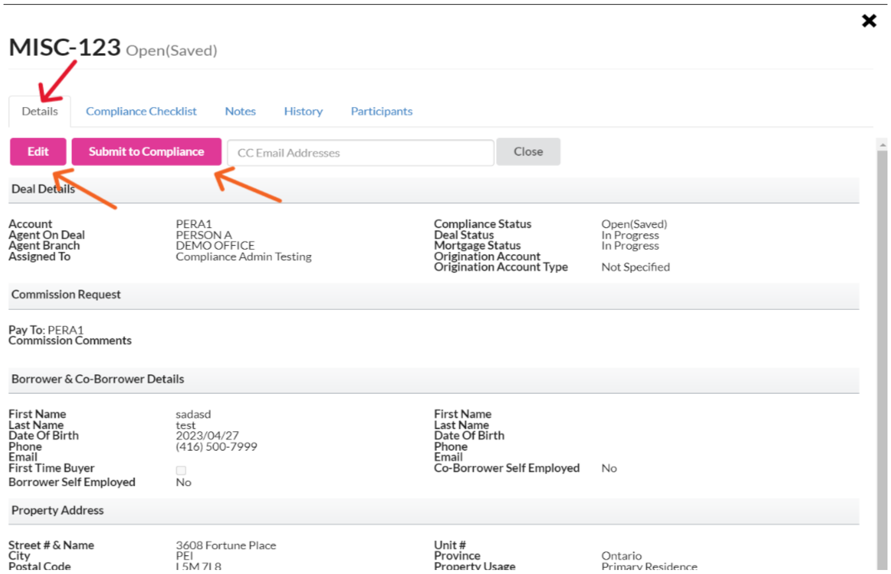
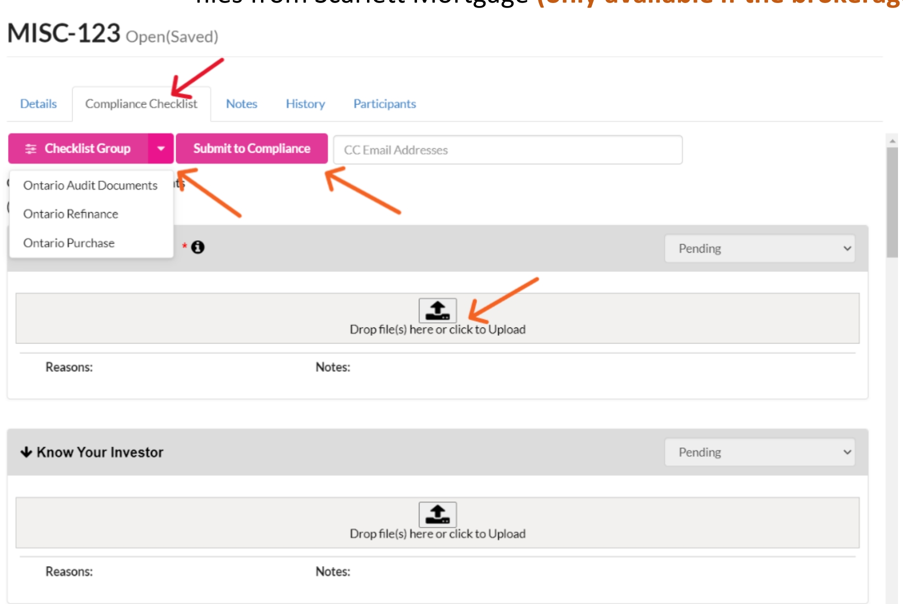
b. The **Submit to Compliance button** allows agents to **submit this deal for compliance review**. **(Recommended to use under Compliance Checklist tab)**




2. The Compliance Checklist tab is the area to upload supporting documents to mark a deal compliant.
    a. Expanding the drop down list for **Checklist Group** will provide different checklist packages depending on the **deal purpose/type**.
    b. 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).**




3. The Notes tab can be used to **relay messages back and forth** regarding required documents or finalization.
    a. 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.

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