



Newton's Velocity program offers peace of mind and greater business control by combining all mortgage processes into one simple, secure, cloud-based system. Through Velocity, you will be able to manage your prospects and clients every step of the journey.

Velocity is designed for prospect management, capturing an application, pulling credit reports, sending your file to a lender, managing conditions and storing documents. Velocity includes A-Z CRM functionality and thorough business-intelligence reports. One data entry point for all client, lender and file management activities in one platform.



Velocity is launching its "Classic" platform on March 1st 2017 which includes;

- Robust application intake
- Credit Bureau pulls
- Direct application submission to key lender partners
- Ability to have all client info in one location

### Phase 1 (June 1 2017)

- Seamless condition management
- Unlimited document storage
- Calendar syncing
- Customized and automated email campaigns
- Enhanced production reporting (business activity, lender volumes, status's, referrals by referral source and much, much more)
- Enhanced data mining (pull reports on virtually any piece of client data)
- All key features from Autopilot Media and Client Manager (automated monthly newsletter, weekly rate sheets and many robust communication campaigns and templates) (DLC)
- Robust tracking of email views and click throughs

### Phase 2

- Teranet purview integration (DLC)
- Google Address integration (auto-populating of client addresses)
- Opportunity Creator (rent-vs-buying calculators, scenario creators, client penalty and savings calculations and much more)
- Secure client portal for document uploads and conditions updates
- E-Signature and approval package integration
- Built-in SMS texting for instant client and referral partner communication
- Mobile app for brokers and clients
- Print CRM Integration
- Social media linking
- Many new private lending options
- Payroll integration and pipeline reporting (Industry Solution)

### Phase 3

- Digital bank statement scraping (to verify closing cost and payments)
- NOA connectivity and transmission to lenders
- Automated credit score monitoring
- Greater cross selling opportunities (MPP, InsureLine, Visa Cards and more)
- Realtor Feature Sheet creation tool (print and online)
- Client presentation packages (create customized packages showing mortgages specifics, amortization schedules, prepayment options and more)

for more information  
visit [www.newton.ca](http://www.newton.ca)