



newton | CONNECTIVITY
SYSTEMS

Velocity Release Notes

Release Date: February 16th, 2024

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Overview

The February 16th 2024 Velocity Broker Release includes enhancements to:

- Client Consent Confirmation
- Annual Reports



Client Consent Confirmation Update

An additional agent signature line has been added to the document with the ability for eSign.

Third Party Disclosure Consent

SIT - Third Party Disclosure Consent test text - English

This text should not be mandatory, and is available for the Office Admin to fill in.

DocuSigned by:
Mayank Singh
BA 8A4F5EF07E41468...

I accept the above terms and conditions

John Doe
Client

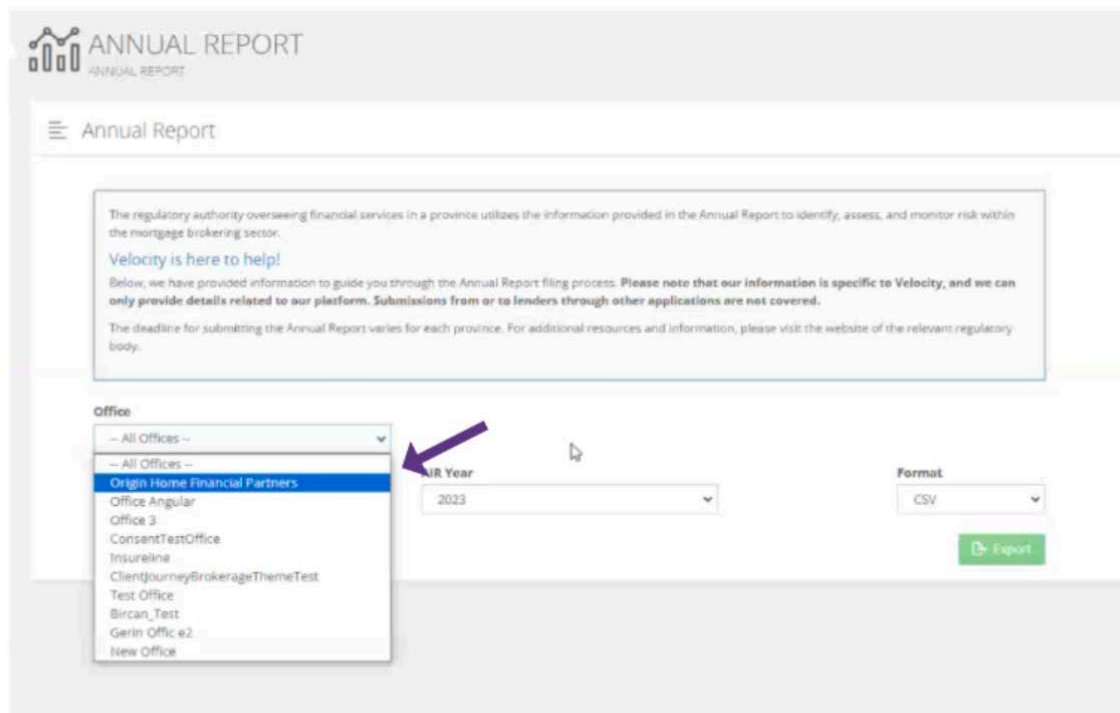
Mayank Singh
BA

Consented By: John Doe
ID: 674a41dd-e45d-40d1-8c0d-f78b7a3257af - Newton
IP Address: 99.251.3.35
Consent Date: Jan. 30 2024, 10:01:56 EST



Annual Reports Update

Should your brokerage have multiple offices, you are now able to pull an Annual Report (AR) by office.



The screenshot displays the 'ANNUAL REPORT' interface. At the top left, there is a logo with three vertical bars of increasing height and the text 'ANNUAL REPORT' and 'ANNUAL REPORT' below it. Below the logo is a hamburger menu icon followed by the text 'Annual Report'. A large text box contains the following information:

The regulatory authority overseeing financial services in a province utilizes the information provided in the Annual Report to identify, assess, and monitor risk within the mortgage brokering sector.

Velocity is here to help!

Below, we have provided information to guide you through the Annual Report filing process. **Please note that our information is specific to Velocity, and we can only provide details related to our platform. Submissions from or to lenders through other applications are not covered.**

The deadline for submitting the Annual Report varies for each province. For additional resources and information, please visit the website of the relevant regulatory body.

Below the text box, there are three dropdown menus and an 'Export' button:

- Office:** A dropdown menu with a list of options: -- All Offices --, -- All Offices --, Origin Home Financial Partners (highlighted in blue), Office Angular, Office 3, ConsentTestOffice, Insureline, ClientJourneyBrokerageThemeTest, Test Office, Bircan_Test, Gerin Office e2, and New Office. A purple arrow points to this dropdown menu.
- AR Year:** A dropdown menu with the value '2023' selected.
- Format:** A dropdown menu with the value 'CSV' selected.
- Export:** A green button with a download icon and the text 'Export'.



Clear Cache

Due to our system update, be sure to clear your cache for optimal deal screen performance!

If you need instructions on how to do so, please click the relevant link below.

[Clear Cache - MAC](#)

[Clear Cache - PC](#)





About Us

As a smart man once observed; "An object in motion tends to remain in motion along a straight line unless acted upon by an outside force." **We're that force!** The force that moves you from that straight, flat line to increasing your sales, improving your clients and lender's satisfaction while reducing your cost, time and aggravation. Our goal is fulfilling your needs and exceeding your expectations. Newton provides a complete range of hosted and licensed system solutions capable of achieving seamless straight through processing of mortgage applications from initial customer enquiry to final mortgage advance.

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