



**newton** | CONNECTIVITY  
SYSTEMS

# Velocity Release Notes

Release Date: March 29th, 2024

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## Overview

The March 29th, 2024 Velocity Broker Release includes various enhancements including:

- VelocityCRM
- Build Reporting
- Compliance Form Language Updates



## VelocityCRM Language Selection

Your VelocityCRM will now send campaigns to suit your client's selected language preference, in English or French.

### Create a Campaign

**Step 4 - What Language is this Campaign?**

**English**  
Send the Campaign to any Audience member whose language is set to **English or has not been selected.**

**Français**  
Send the Campaign to any Audience member whose language is set to **Français.**

[Back](#)

[Find out How](#)



## Addition to Build Reporting

We've introduced a new filter for Assigned Users, enabling you to generate reports tailored specifically for them alongside Agents.

Create a New Report Cancel

*If you are creating a report for another Agent's VelocityCRM, please have them login to their Velocity account.*

**Step 1** REPORT SET UP

*Heads up! If you create a report for Kevin Dear, any contacts that are not yours will be unavailable for Audience Lists in your VelocityCRM.*

<b>OFFICE</b> Origin Home Financial Partners	<b>AGENT</b> Kevin Dear	<b>REPORT NAME</b> Maturities Report	<b>REPORT TYPE</b> Deals
<b>STATUS</b> Complete	<b>APPLICATION TYPE</b> -- Select --	<b>ASSIGNED USER</b> AnaC Robledo	
<b>DATE TYPE</b> -- Select --	<b>DATE RANGE</b> Feb-01-2022	TO	Mar-01-2024

**Current Selected Filters:** STATUS X ASSIGNED USER X DATE X Clear All



## New Brunswick Compliance Form Updates

We've aligned New Brunswick's (NB) Compliance Forms with the current standard, including updates to two form names:

- NB Broker's Disclosure to Borrower
- NB Mortgage Disclosure Statement

Additionally, we have removed the NB Mortgage Brokers' Disclosure to Borrower.



## 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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