

Recent SENRO Developments



Introducer Users New Access Rights

Introducer users can now gain access to prospect profiles and prospect notes and activities screen to be updated on progress and leave notes for the prospect administrator.

Using the privacy controls within a Notes and Activities screen you still have control over which notes and activities can be viewed by your introducer user.

Introducer licenses can be purchased in batches of 5 for £10 per month, for which they will be able to log into your SENRO system, pass through referrals, track progress, be updated and have commission calculated and allocated to them.

Fees Page Ability to record source against a fee or commission expectation

On occasion, it may be appropriate for the source against a fee to be different to that of the case or client as this could effect an advisers commission entitlement.

Along with the existing ability to record a source against a client, prospect and a case, you can now record a source against an individual fee.

Should commission need to be allocated to an introducer, it is still essential that 'Non Editable Introducer' is initially selected and then the introducer in question.

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SENRO NEWS

PROVIDED TO YOU BY EKEEPER
GROUP LTD

SENRO



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SENRO News

We explain how your SENRO system provides you and your business with a safe, independent system for those who are not willing to 'put all their eggs in one basket' on page 1.

Wish fulfillment, we have been busy granting numerous wishes over that last few weeks. See recent SENRO developments on pages 1 & 2.

We update you on up and coming SENRO releases on page 3.

Do you get frustrated with the speed and performance of your web browser? We explain how you can 'spring clean your machine' on page 3.

Your Senro System - an Independent System secures your future.

In this industry we spend a great deal of time talking to clients about the value of investing money in their future.

With SENRO you have the potential to increase your new business volume, as well as improving efficiency and time management.

If the lead management tools or user friendly marketing sections of SENRO help you generate 1 new application per user, this would likely cover your costs for the system for the entire year!

Using SENRO generates more revenue, increases your profit margin, improves efficiency and client care. It substantially increase the value of your company; you have made an excellent investment choice .

And don't forget, by having a completely Independent system from a network or network supplier, you have the reassurance that the data contained within the system is owned by you!



Over the past 10 years, SENRO has grown into an established, and extremely effective system used by Mortgage and Financial Advisors throughout the United Kingdom. Through client recommendation the system is what it is today and for this we have to thank you, our users.

Your SENRO System - an Independent System secures your future
A vital system to hold all your client information and add value to your business



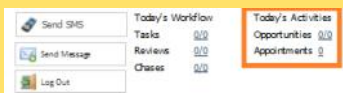
SENRO

THE FINANCIAL SERVICES ENGINE

New Hyperlinks added to diary and client management tools

New hyperlinks have been provided to make your SENRO system more seamless and effective in assisting you in completing your daily duties in the most productive way.

Hyperlinks have been provided within the tool bar at the top of your SENRO screen, providing a direct link to your opportunity manager and also appointment diary.



Additional hyperlinks have also been provided within your Prospect Bank, Client Bank and Business Pipelines.

Last Note	Total Next Chase	Outstanding Activities	Adviser Administrator	Case Value
20/09/2012	0 Chase	0 Review	Your User Here	Upfront: Additional:
--	0 Task		Your User Here	Trails: Renewals:
			Your User Here	

The listed diary activities within the column 'Total Outstanding Activities' are now interactive, and if selected will open the Notes and Activities screen for the case, client or prospect selected.

Commission and Fee Reconciliation New Notification Message

A new notification message has been added to the bottom of reconciliation reports informing our users that claw backs cannot be reconciled through at company level until the policy has been stopped. If a clawback is not reconciling as instructed, you may need to check the progress page of the policy by selecting the magnifying glass to the right hand side of the case within the report.

Should you require any further information on any of the above subjects, please contact SENRO support on 01275 400660.



Spring Clean your Machine

This spring, don't just clean the dust-bunnies out from under the furniture. Dive deep into your PC, even the Windows operating system, to get everything working its best!

As you prepare to tackle the floors, windows, and everything else you've neglected, you should seriously consider giving your PC, be it desktop or laptop, a thorough cleaning as well.

Spring cleaning is a mood booster. Be it our homes or offices, the psychological payoffs that result from tidying up our spaces for the new season are significant and can hopefully bring with it added benefits to your professional performance, and also to the smooth running of your SENRO system and other software programs you may be using.

As technology advances, new browsers and functionality evolve and are constantly released. Sometimes, with these updates previous browser settings can be restored, having a knock on effect in how websites and online software tools appear and function.

See September 2012's issue of SENRO news, which details on page 4 how IE9, without being in compatibility mode, is having an effect on the Notes and Activities page functions.

It is also quite common for newly installed programmes or 'add on's' to also install a new tools

bar within a browser. These tool bars could affect your browser experience as some elements can interfere with website and online software performance.

SENRO currently supports Internet Explorer, Firefox and Safari. Please note however that if you are using Internet Explorer 9, this will need to be in compatibility mode. A userguide is available from SENRO support explaining how this can be completed.

It's really easy to spruce up your computer and won't take long. Follow these 4 simple steps to spring clean your PC:

Step 1: Uninstalling programs (de-clutter)

The trick to any spring clean is knowing what is junk and what you may need later on, when uninstalling old programs this is key.

To find out which programs are currently installed on your computer:

1. On your computer go to **start > control panel**

2. From **control panel** locate **add or remove programs** When you're inside of the 'add or remove programs' menu, every program you've installed will be visible, including Windows

update packs and anti-virus software.

Things you should be looking to uninstall are:

- Toolbars (those annoying extra search bars that sometimes appear in your browser with smiley's, symbols or adverts on them).
- Any out of date anti-virus programs just hanging around (however replace these with newer versions or update your subscriptions).
- Old software, or games that you no longer play.

When you've identified which programs you wish to remove, you need to follow the two simple steps below to remove each one in turn (unfortunately Windows does not offer a mass-uninstall option for multiple programs at once right now).

To uninstall a program from your computer:

- From the 'add or remove hardware' menu, select the program you wish to uninstall.
- Click **uninstall**, it's the first option they offer you at the top of the list.

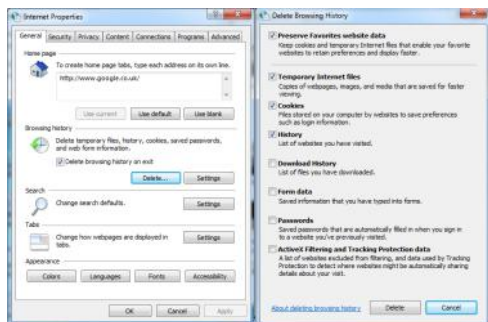
Step 2 - choose your start up programs (speed things up)

Now that you've uninstalled the programs you no longer need, it's time to decide which of the programs you're keeping that should open up straight away when your computer comes on. Some programs automatically add themselves to your start up options when they are installed. This causes your computer to boot more slowly as it needs to load that program before you start your user session. The program sits in the background, using up valuable CPU (your computer's capacity to process tasks, measured out of 100% utilisation). The biggest culprits are iTunes and phone software such as Blackberry Desktop Manager.

To change your start up programs:

1. Go to your **start** bar
2. In the search bar type "**msconfig**" and press **enter**
3. On the window that pops up, go to the **start up** tab
4. From the list of start up programmes that appear, un-tick those that you don't need
5. After this, click **apply** and **restart your system**

I must strongly advise that you only de-select the programs that you know you don't need when your PC first loads up, otherwise you'll end up trawling through menus to open your favourite software far too frequently.



System Configuration Pop-up (Step 2.)

Step 3 - delete your temporary internet files (clean-out)

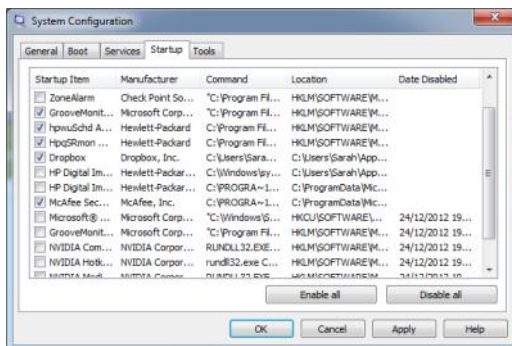
Temporary internet files are small pieces of data about your internet sessions that build up

over time. They store parts of your web browsing history on your machine and take up chunks of memory on your machine. The impact of temporary internet files on your computer storage will be minimal at first, but eventually it will build up.

To clear out temporary internet files:

1. Go to **Start > Control panel**
2. Then **Network & Internet > Internet Options**
3. Next click the **general tab** and then click **delete** under browsing history

Finally confirm that you want to **delete all** of this information.



Internet Options Pop-up's (Step 3.)

Step 4 - smarter digital storage (pack away)

Finally, a good way to free up space on your computer is to move some of your information to external storage, like a physical hard drive that plugs into your PC via USB, or a backup CD, or a virtual cloud drive like Dropbox.

Option 1 is probably the easiest for most people. By moving your pictures, music and videos over to an external hard drive, you are freeing up space on your computer. While this isn't necessarily a vital thing to do, if your computer has a large storage capacity, it does provide you with extra peace of mind that if anything ever happens to your computer your important information will be safely saved on an external disk drive allowing you to simply plug into your next PC and restore your data.



Planned System Enhancements

Improvements shortly to be released onto your SENRO system

We are pleased to confirm the imminent release of some further enhancements to your current SENRO system.

Marketing Searches and Exports

The enhancements planned for the Search and Export section of the SENRO system include over 70 additional filters and field selections that are to be made available within product, client and activity search categories in marketing.

Commissions and Fees & RDR

A new fee type is to be introduced to SENRO called 'Client Servicing Fee'. This fee type is to run alongside the existing additional, Trail, Renewal and Upfront fee types, and will work in a similar way to trail fee's.

We will also create logic to ensure that appropriate fee terminologies such as 'ongoing' are recognised as a client servicing fee within the batch import tools to ensure that these fee types are recognised by SENRO and reconciled correctly.

OWS (Galaxy) Integration

Integration with OWS (Galaxy) is close to release, so you will be able to send your client information to Openwork from your desktop.

The SENRO elements are complete, but we are waiting for the Openwork side to be delivered so we can work with them on testing. We are working closely with Openwork on this project and will keep you updated on launch dates.

For more information on any of the above, please contact sarah.king@ekeepergroup.com

More information on our 'wish' service is also available from the online 'user guide' section of SENRO.

<http://v4userguide.senro.co.uk/>

ONE 4 Kids **A very worthy cause.**

In September 2012, representatives from the eKeeper Group were invited to attend a fabulous evening, hosted by the One Solution Group in aid of their very own charity One4Kids.

One hundred and eighty friends and clients of One Solution were welcomed into Glasgow's impressive Grand Hall. The event itself was truly impressive. Guests dined and enjoyed the delights of the musicians, Estás Tonne and Stória. With ambient lighting and huge screens, the scene – and the stage – were set for a memorable evening.

Those who attended were quite taken aback by the amazing work that One Solution do for this charity, the reasons behind it founding and also by the stories of those children that they help. It was quite uplifting to think that there are people and businesses out there who feel that it is appropriate to do something about it and to also take the time to do so.



The evening started with a champagne reception. Following this, Ken Anderson, the Group's CEO, gave a moving speech about the origins of One4Kids and how the charity forms an essential part of the Group's ethos and culture, noting that every penny of the money raised goes straight into the hands of a child or family in need.

We then watched a montage of photographs taken throughout One4Kids work over the last eight years. A delicious dinner was served before the performers

took to the stage, Estás wowing the audience with his flamenco guitar and vocalist Stória played an enchanting instrument called the hang.

The evening raised over £18,000 for One4Kids as every event is fully funded by the Group. An extremely worthwhile evening and the eKeeper Group felt extremely proud and privileged to have been invited to be part of the event

For more information on One4Kids or if you would like to make a donation, please visit

<http://www.onesolutiongroup.co.uk/one4kids/>

This Month's Q&A Technology Tips

Q: When I try to print something from SENRO, including letters, a website address prints at the top of the letter? How can I stop this from happening?

A: Sometimes, browser setting are configured in a way that includes the URL (website address) from the site you are printing from to include that specific web page in the print out.

It is very easy to prevent this from happening by completing the following:

Short cut key to file menu is ALT F

- Firefox =**
1. File -> Page Set up
 2. Change the Header and Footer filters to 'blank'

so these no longer display on print outs

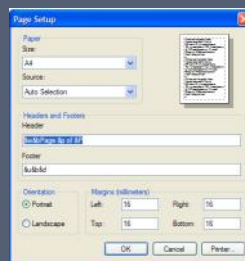
3. This must be done on each PC

Internet Explorer =

1. File -> Page Set up
2. Remove the header code from the Header and Footer fields and OK to save changes.
3. This must be done on each PC



Firefox



Internet Explorer



THE FINANCIAL SERVICES ENGINE



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On the 21st April 2013, **Jim Burns** of **Andrew Kelly and Associates** will be attempting to complete the **Virgin London Marathon** to raise money for the **Openwork Foundation** – part of the Zurich Community Trust – a charity providing much needed financial support to many and deserving children's' causes and charities in the UK and abroad.

This will be the second time that Jim has ran this marathon and is excited about raising funds for such a deserving cause.

PLEASE go to <http://uk.virginmoneygiving.com/JimBurns> to make your donation - and THANK YOU for your help!



The Openwork Foundation
Cares 4 Kids