

## Recent SENRO Developments



### Client Segmentation

#### Implementation of the Bulk Change tool

This feature has been introduced into V4.31 systems under the Management tab in preparation for the onset of RDR, with some new additional options that will allow you to segment your clients based on their product criteria.

This release will be a gradual roll out, and we will aim for all our clients to receive this feature by the end of the year. For more information on Bulk Change, and its implementation onto V4.31 systems, please contact Laura Stamper [laura.stamper@ekeepergroup.com](mailto:laura.stamper@ekeepergroup.com)

### Improved Outlook Integration

#### Outlook 2010 integration through the SENRO calendar

The new updated version of Outlook integration delivers a more seamless office tool to use within your practice.

This is a 2 way integration, so all calendar appointments and events within SENRO will appear within Outlook should they not already be visible, and vice versa.

To do this, simply run our Outlook plug-in tool by visiting the following address: [www.senro.co.uk/outlookInstall/](http://www.senro.co.uk/outlookInstall/)

Further information on both of the above can also be obtained within the SENRO user guides:

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



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## SENRO News

### RDR UPDATE

Your Senro system is a vital tool to help your business continuity and improve efficiency to meet the challenges and opportunities of RDR.

In this issue:

- **Client Segmentation with Bulk Change**
- **Enhanced Marketing Reports**
- **Efficiency Tips and Facilities**

### DOCUMENT STORAGE

The secure Senro document storage facility is key for your efficiency **as well helping you with a vital statutory requirement.** The FSA has detailed guidelines, backed by the Information Commissioner regarding the secure storage of all client data. **To encourage the use of this important function Senro are reviewing our offering and will be announcing additional attractive storage options for next year.**

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

### OPENWORK INTEGRATION

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

### UPDATED USER GUIDES

Did you know they were on-line?

They have also been updated.

Find out more on page 4.

### DID YOU KNOW?

The eKeeper group have implemented their CRM system into the **Bank of China** to help manage their mortgage offerings.

Bank of China are the oldest bank in China and the 5th largest bank in the world. The London office was founded in 1929 and was the first overseas financial institution formed by any Chinese bank.



## Planned System Enhancements

### Improvements shortly to be released onto your SENRO system

In addition to the developments mentioned on Page 1 of SENRO News, 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.

The aim of these new markers and field selections are to assist our users in the segmentation of their clients based on their product criteria in preparation for the onset of RDR. They have also come about due to the 'wishes' that have been logged by our clients.

Work is progressing well with a view to have these changes available before the end of the year.

For more information on this subject, please contact [sarah.king@ekeepergroup.com](mailto:sarah.king@ekeepergroup.com). More information on our 'wish' service is also available from the online 'user guide' section of SENRO.



## Efficiency Tips and Facilities

With the onset of RDR looming, and with much of your valuable working time being taking up in preparation for this, we felt in each issue over the next few months we could focus on features already available within your SENRO system. This aims to reduce time spent on current tasks enabling you to turn your attention to where it is most needed.

In this edition, we focus on the **Electronic Commission Reconciliation tool** which was first introduced into SENRO V4.31 within the Accounts section of the system.

As a more recent release, we felt it was time to promote this facility and its benefits.

Our **batch import commission reconciliation tool** enables you to **configure your own CSV import templates**, selecting how many columns you have and what data appears in each column, what format it is in. You can also drag and drop the columns to change the order.

This means you can create a template for each product provider, application or fee type, or

one for your Network, so there's no need to cut and dice your spreadsheets.

You can **simply upload the file** in a CSV format which are readily available to download from provider or network sites.

Once you've uploaded the file, the **system will read the number of commission entries**, or lines in your CSV file. You can then run a '**Fee Validation Check**'. This looks at all your applications in the system to find matches.

The validation screen that will then become available enables you to **view the matches found**, or even **enter a missing fee expectation** for those that have found a case match only but no fee.

Once you have reconciled at channel level, you then have the ability to reconcile further at company, advisor and introducer level.

**Templates are available** from SENRO support for your reference, and we would be more than happy to provide templates for those that are not currently available upon request.

**For further information, please contact SENRO support on 01275 400660.**

**Of course your user guides are also available online by selecting the black 'user guide' icon in the bottom right hand corner of your SENRO screen.**





## Communication Templates

The advantages of creating your communication templates within your SENRO system.....

**Are you still creating your client and provider letters in Microsoft Word?**

**Do you have to type your client and plan details onto each letter you create?**

**Do you have to upload every document you create in Word to SENRO?**

**Would you prefer to spend more time looking after your clients and less time making letters?**

You may have answered 'yes' to some of the above, and if so, we are pleased to inform you that SENRO provides a communication template facility that is intended to make this daily activity more streamlined and less time consuming.

**Some of the advantages of creating your communication templates within SENRO include:**

**Saving you valuable working time and effort.**

Communication templates can be made with minimal effort. Because the content of your letter may well be contained within the client, prospect or product profile, we provide the ability for you to use 'markers'. These will pre-populate the data content, meaning you may not need to manually enter any of the information in your letter as this tool will do it for you.

**Create letters on the move.**

Because SENRO is a web based solution, you can create, edit, save and print your letters anywhere that you may have internet access. You can start you letter on the train, at home, and then print it when you return to the office and maybe even on a different machine, without the need to use a USB or disk.

**SENRO's communication templates will take up no document storage space.**

Letters that are created within SENRO will not have any affect on your document storage. This brings the benefit of having a more cost effective system in place for your business.

**Ability to create bespoke communications from standard letter templates.**

You can create set communication templates within the system, with the ability to pre-populate the content of your letter. They can also be edited on an individual basis.

**Don't forget that not only can you print letters and postage labels from SENRO, you can also create email and SMS communication templates.**

**For more information on this subject or if you require any assistance, please contact SENRO support on 01275 400660.**

**You can also access your online SENRO user guides by selecting the 'user guide' icon in the bottom right hand corner of your SENRO screen.**

## EYE ON IT

Current Industry News & Trends

**More banks withdraw from investment Advice**

**A threat or an opportunity?**

Lloyds bank has become an-other high street bank to withdraw from offering mass market advice in a recently announced u-turn. It is thought they will instead direct customers to IFAs via the FSA web-site.

**Is the impact of RDR in danger of undermining its objectives?**

'The end result with RDR will be an awful lot of clients who do not have anywhere to turn. Considering that the whole point of RDR was to increase clarity and value clients, I think it could turn out to be a massive "shoot yourself in the foot" exercise'

Lloyds has since conducted a review and found that the majority of consumers with less than £100,000 of investable assets would not be willing to pay a fee for the service.

However some have commented:

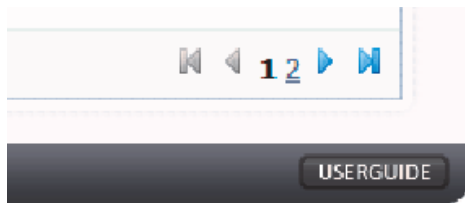
'Whoever a customer goes to, Bank, IFA or Insurance Company, it comes down to professionalism and trust. The principle of it being a selling job will not change, neither will the fact that people buy from people.'



## SENRO User Guides

Did you know that there is free online access to the SENRO users guides through your own SENRO systems?

The SENRO user guides are available by selecting the 'USERGUIDE' icon in the bottom right hand corner of your SENRO screen as shown below.



The SENRO user guides cover all the features that immediately improve the efficiency and productivity of your business.

We recommend you use the SENRO user guides in conjunction with our recommended training sessions incorporating modules for the SENRO system.

You also have the ability when accessing the user guides to let our support team know about any issues you are encountering, and even log a 'wish' which allows you to have input into future development projects.

At the eKeeper Group, we are committed to building a long lasting working relationship with you and aim to help you get the most from your SENRO system.

## This Month's Q&A Technology Tip

**Q: When I am creating letter and email templates in my SENRO system, it seems to add in additional characters, paragraph spacing, why is this?**

A: If you notice multiple fonts or formatting errors within the text, the issue may be caused by copying and pasting content from word processing programs into SENRO.

Software programs such as Microsoft Word and Apple iWork use complex and specialised code to create formatting within documents. Although this code is invisible on the page, it can sometimes be included when copying and pasting text from one program to another. Web browsers and internet applications also have their

own coding language used for formatting and displaying content and sometimes struggle to interpret instructions from word processors, resulting in font disparities and the loss of formatting within the web browser. In most cases content will look erratically formatted,

while some content may fail to display entirely.



To solve this issue, SENRO has a special 'copy and paste' tool which can be accessed by selecting the below icon within your SENRO communication template screen. A pop-up will then open allowing you to 'Ctrl -V' which allows you to paste without formatting issues occurring.



SENRO

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## We want to hear from you!

Do you have any feedback on any of the articles contained within SENRO News?  
Are you or your business involved in an exciting event that you would like us to promote?

Do you have any feedback in relation to your SENRO system?

Do you have an article or have a view on current industry trends you would like to see included?

**We want to provide you, our clients, with the opportunity to be involved with SENRO News.**

If any of the above is of interest, please contact Sarah King [sarah.king@ekeepergroup.com](mailto:sarah.king@ekeepergroup.com)

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