

# SENRO

**Autumn Newsletter**  
October 2009

# SENRO



**SOLUTION4**  
POWERING YOUR BUSINESS INTO THE FUTURE

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Welcome to the SENRO autumn newsletter. The aim of these newsletters is to keep you updated with what is happening with SENRO and Solution4 rather than provide you with New Release updates which detail the new functionality that has gone into SENRO. We will produce these newsletters on a Quarterly basis.

## The Move to Version 3

The move to Version 3 was complicated as we replaced our current development team with a senior development team who would enable us to take SENRO to a new level. As a result, a number of sections have now been re-written and offer more functionality but also provide stability of the system. There are still some sections that need to be re-written with newer code. Predominantly these are:-

1. Office Section (including the notes/task page)
2. Reports (including the fees page)
3. Marketing
4. Management & Maintenance
5. Financial planning files.

In the last 18 months we've replaced the following pages:-

- Calendar
- Mortgage Files
- Pipelines
- Client Bank
- Occupations
- Health and ID
- Relationships
- Personal and Corporate overviews.

As part of rebuilding these sections, we've provided a large amount of new functionality on the above projects but also implemented the following new projects;-

- Liabilities (within client files and pipelines)
- Corporate mortgages
- Staff pages
- Address History
- Credit History
- Email marketing
- Properties and Assets
- Trigold integration
- Morningstar integration with new fund pages
- Portfolio page
- Impersonate tools

Our current priorities are to address some of the older sections and replace them with new code and better functionality.

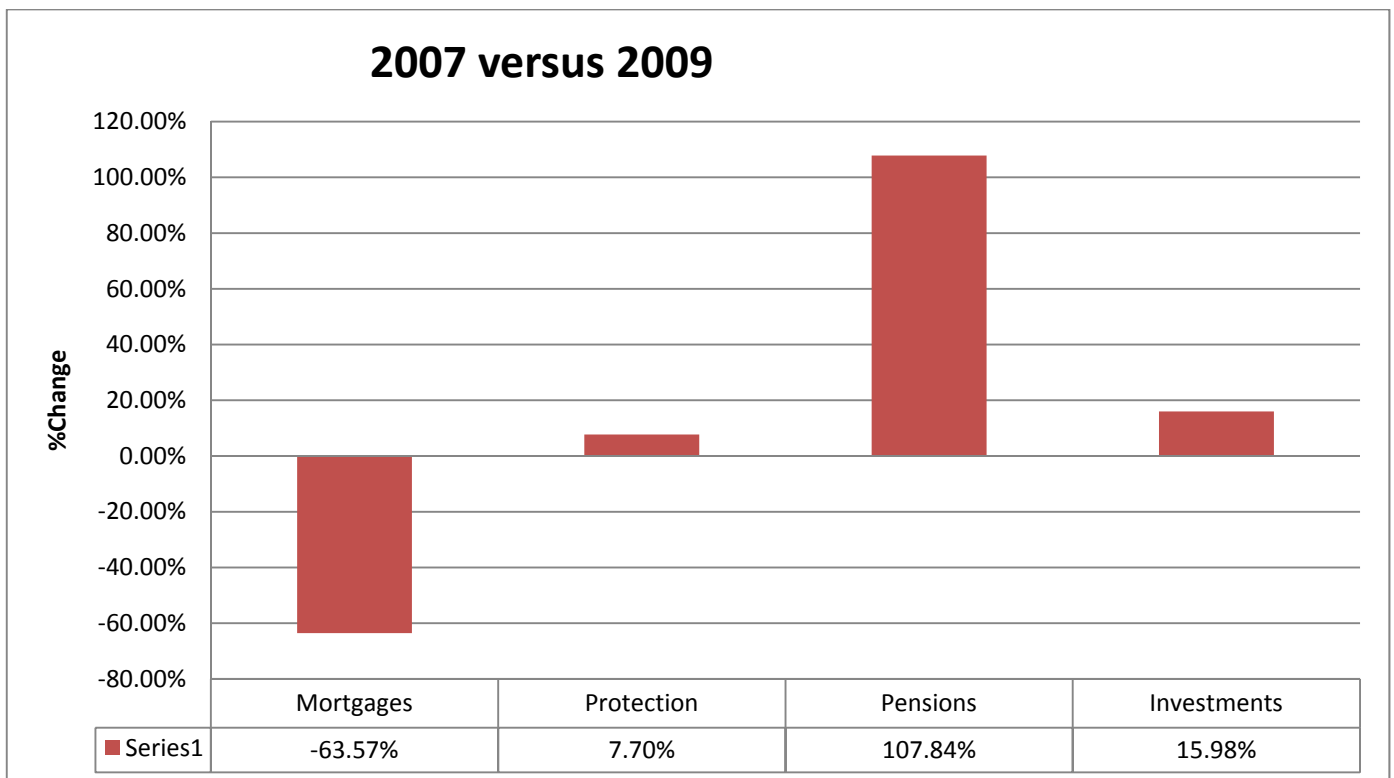
We are aiming to move all clients to Version3 by the end of November, however, should you wish to move sooner please contact us and we will be happy to organise this for you.

## The Current Climate

I'm sure you can appreciate the economy has hit every business including our own. This means we need to work within our current resources. This is difficult as our subscription amount is far cheaper than any other system but requests from our clients for new functionality is still very high and slowly we're building a platform that competes with IntelliFlo and 1<sup>st</sup> software for 1/6<sup>th</sup> of the price.

However, in the meantime our current development team is already working on the 'Office project' and 'Reports' section. Therefore, we should be releasing a new version of both of these sections by the end of the year or the beginning of next year.

We are all aware that the current economic climate has meant that our clients have had to look at new ways to generate both new leads and new business. We have spoken to several SENRO users over the last couple of months, discussing how their business has changed over the last 18 months and the results make interesting reading.



I think we all knew that this was happening, but it has been mostly anecdotal, until now!

## Staying Relevant

In order to ensure that SENRO is still relevant to your business, we have started discussions with several pension and investment companies to look at providing a range of additional services to help you grow your business. The below table demonstrates where SENRO currently is and the providers we are working with. I am sure you will agree with me that this will take your SENRO system to a whole new level and provide you with a set of fantastic tools.

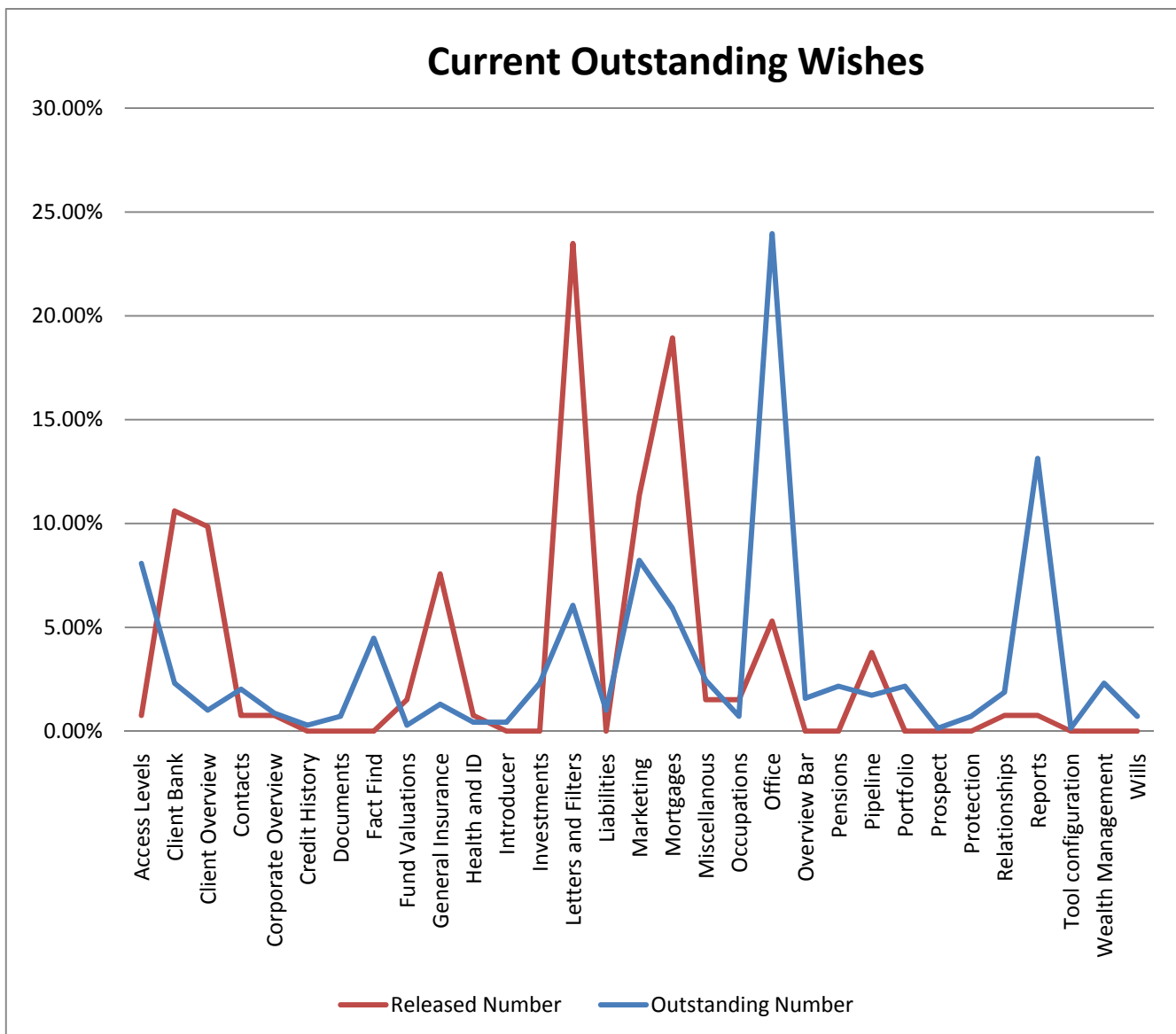
Opportunity Management			Point of Sale				Application Processing		Post Issue		
Analytical Reports	Marketing	Referral Management	Fact Find	Needs Analysis	Pricing	Reasons for Recommendation	Pipeline Management	Diary Management	Fund Valuations	Reports	Commission Reconciliation
Policy Schedule											
Fund Fact Sheet											
Policy Summary											
Net Worth Statement	✓	✓	✓	Aegon Integration	Assure Web Integration	Defacto Integration	✓	✓	Morningstar Integration	Aegon Integration	✓
Savings/Pension /Asset Report											Easy link Integration

## SENRO Wishes

We continue to receive and prioritise all of the requests for changes to SENRO. We currently receive over 50 requests each month from you. In order to make this process easier and more transparent, we would like to change the way we receive these wishes. At the moment, our clients either call or email support and ask for new functionality, we would like to change this to email only, using the email address below. Please include as detailed an explanation as possible with your wish.

- Email us at [wishes@solution4.co.uk](mailto:wishes@solution4.co.uk)

You will receive a confirmation of your wish together with a "wish reference number" This will allow us to more easily track all wishes and notify you when a decision has been made regarding the wish, that is, whether or not it will be added to SENRO.



## SENRO Questionnaire

We will be conducting a client survey over the coming months and we invite you all to share your thoughts with us. This will cover all aspects of your contact with Solution4 from support to accounts. We will be publishing the results of the survey once completed. We are very keen to be completely transparent in our dealings with you and would greatly appreciate your support with this survey. It will take no longer than 10 minutes of your time.

## OBP Integration

For our Openwork members you will be pleased to hear that testing is currently taking place and we can confirm that we will do everything in our power to ensure that this integration is ready for the release of OBP.

## Funds Pages – Morningstar Integration

Several changes have taken place recently on the fund pages within SENRO. These changes were done to reflect the Morningstar integration. We are aware that this has caused some confusion for some of our clients and we are therefore currently reviewing how these pages work within SENRO. Please bear with us whilst we take all of the requests for changes into consideration and a new development specification is written to address these requests.

## Contact Details

Please feel free to contact us to discuss any of the points raised in the above. Our contact details are;

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Kind regards



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