

SENRO

New Release Notification

SENRO



SOLUTION4
POWERING YOUR BUSINESS INTO THE FUTURE

Dear SENRO Users

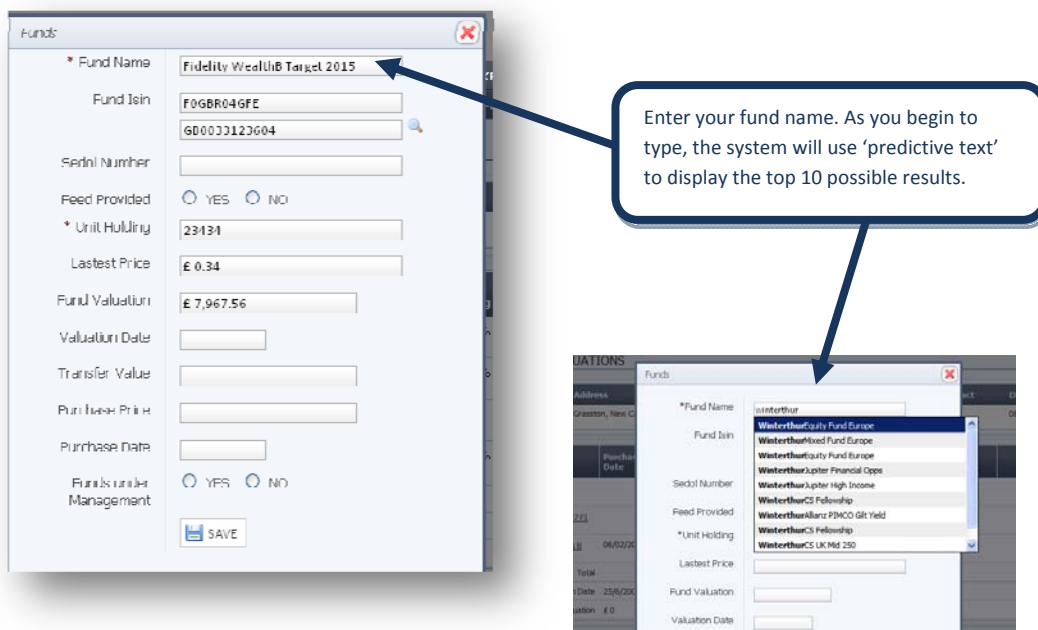
We are pleased to announce that the following new developments have been released in Version 3 as of 14th September 2009.

Funds

The new fund pages are available in both the Pension and Investment files. These pages integrate with 'Morningstar' for daily pricing feeds to calculate your fund values.

Click on the 'Add' button to enter a new fund record.

To create a valuation history of updates made to your funds, you must edit the fund and overtype /enter the new details.



Email Marketing

This new functionality allows you to send HTML emails to your clients; this is really useful if you want to or already produce a monthly newsletter.

To access this functionality within SENRO go to Marketing -> Templates -> input a template name and select what this template relates to, (client, mortgage, protection, general insurance, pension, or investment), remember to set this to "Active" in order for this to be available, Select "Format" as "Email"

The screenshot shows the 'NEW MARKETING TEMPLATE' form in the SENRO application. The form is titled 'NEW MARKETING TEMPLATE' and includes the instruction: 'Please select your template options, then click on Create Template.' The form fields are:

- NAME:** Monthly Newsletter
- TYPE:** Client
- STATUS:** Active
- FORMAT:** Print (with a dropdown menu showing options: Print, Email, SMS)


A 'Create Template' button with a green checkmark is located below the form fields. The page header shows the date 'Tuesday 8 September' and time '4:25:15 PM'. The footer includes 'POWERED BY SOLUTION4' and 'USERGUIDE'.

This will then take you to a new screen (see below). We have provided 9 blank newsletters for you to customise, simply select the template you wish to use and then customise this by entering your own data and SENRO markers into the relevant sections.

TEMPLATE OPTIONS

NAME Monthly Newsletter **TYPE** Client **STATUS** Active **FORMAT** Email

AVAILABLE LAYOUTS



Template_2 Template_3 Template_5 Template_4 Template_8 Template_9

TEMPLATE MARKERS

Click on your template, and select 'markers' below, to insert them into the template.

Common Markers -- select a common marker to insert -- **Single Client Markers** -- please choose --

*If you use any of these **Single Client Markers**, you will no longer be able to create **joint letters** with this template.*



The screenshot shows the email editor interface. At the top is a rich text toolbar with icons for bold, italic, underline, text color, background color, bulleted list, numbered list, indent, outdent, link, unlink, insert image, insert table, insert video, insert audio, insert iframe, insert form, insert signature, and insert link. Below the toolbar is a preview of an email newsletter layout. The layout includes a header with a background image of a calculator and a pen, a red banner with the text "<Your Name> Monthly Newsletter" and "Issued <Date>", a "Latest News" section with the headline "Nam justo sapien" and a "Header One" section with a line graph icon.

Once you have completed this save your template.

To use this template in a client search, go to Marketing -> New Client Search. Select your given criteria and save the search. Then once saved "Create Campaign" and then select your new saved email template. Give your campaign a name and save this.

Liabilities

You may now key in client liabilities within the existing arrangements of the client file. When you “Add” a new liability you will be presented with the following screen.

NEW LIABILITY FOR PROF. ABRAHAM L ADAMS

LIABILITY DETAILS

| | | | |
|--------------|--|---------------------|---|
| Type | <input type="text" value="-- Select --"/> | Repayment Amount | <input type="text" value="£ 0"/> |
| Lender | <input type="text" value="-- Select --"/> | Repayment Frequency | <input type="text" value="-- Select --"/> |
| Branch | <ul style="list-style-type: none"> Credit Card HP / Lease Rental Car Loan Personal Loan Student Loan Store Card Overdraft Family Loan Maintenance Payments Alimony Payments Private School Fees Monthly Expenses Other | Balloon Payment | <input type="radio"/> YES <input checked="" type="radio"/> NO |
| Description | | Balloon Value | <input type="text" value="£ 0"/> |
| Secured Loan | | Outstanding Debt | <input type="text" value="£ 0"/> |
| Conditions | | Term Remaining | <input type="text"/> years, <input type="text"/> months |
| End Date | | Interest Rate | <input type="text" value="0%"/> |
| Details | | | |

APPLICATION PROGRESS

| | |
|----------------|---|
| *Case Status | <input type="text" value="-- Status --"/> |
| Enquired | <input type="text"/> |
| Submitted | <input type="text"/> |
| Approved | <input type="text"/> |
| Offer Issued | <input type="text"/> |
| Offer Approved | <input type="text"/> |
| Start Date | <input type="text"/> |
| Stopped | <input type="text"/> |
| Declined Date | <input type="text"/> |
| Review Date | <input type="text"/> |

APPLICATION DETAILS

| | |
|----------------------|---|
| Company Registration | <input type="text" value="-- Select --"/> |
| Administrator | <input type="text" value="-- Select --"/> |
| Adviser | <input type="text" value="-- Select --"/> |
| Source / Introducer | <input type="text" value="-- Select --"/> |
| <hr/> | |
| Arranged In-House | <input type="radio"/> YES <input checked="" type="radio"/> NO |
| Type of Submission | <input type="text" value="Electronic"/> |

NOTES

Complete the relevant fields where appropriate.

Liabilities will be available within both marketing and reports in the near future.

Personal and corporate filter in client bank

A new advanced filter has been added to the client bank to search 'Client Type'. This enables you to filter 'Personal' or 'Corporate' clients.

Partner link in client bank

You now have partner details link from the client bank.

New Title in Client Overview

"Master" has been added to the 'Client Title' dropdown in the client overview.

Save and Exit buttons in Letters

The letter templates have been updated with SAVE and EXIT buttons at the top and bottom.

Letter Preview Function

A preview option has been added to the client letter files.

Please continue to provide us with your feedback, every request is taken seriously and helps us to deliver the system you want.

Regards

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SENRO

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