SENRO

New Release Notification

SENRO

SOLUTION4

POWERING YOUR BUSINESS INTO THE FUTURE

Dear SENRO Users

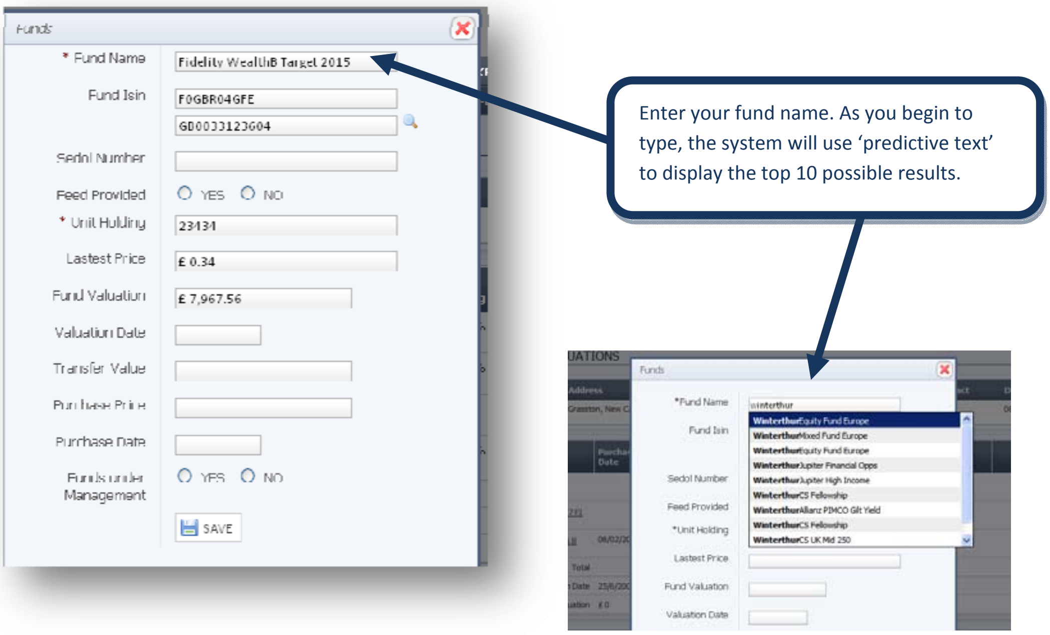
We are pleased to announce that the following new developments have been released in Version 3 as of 14th September 2009.

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.

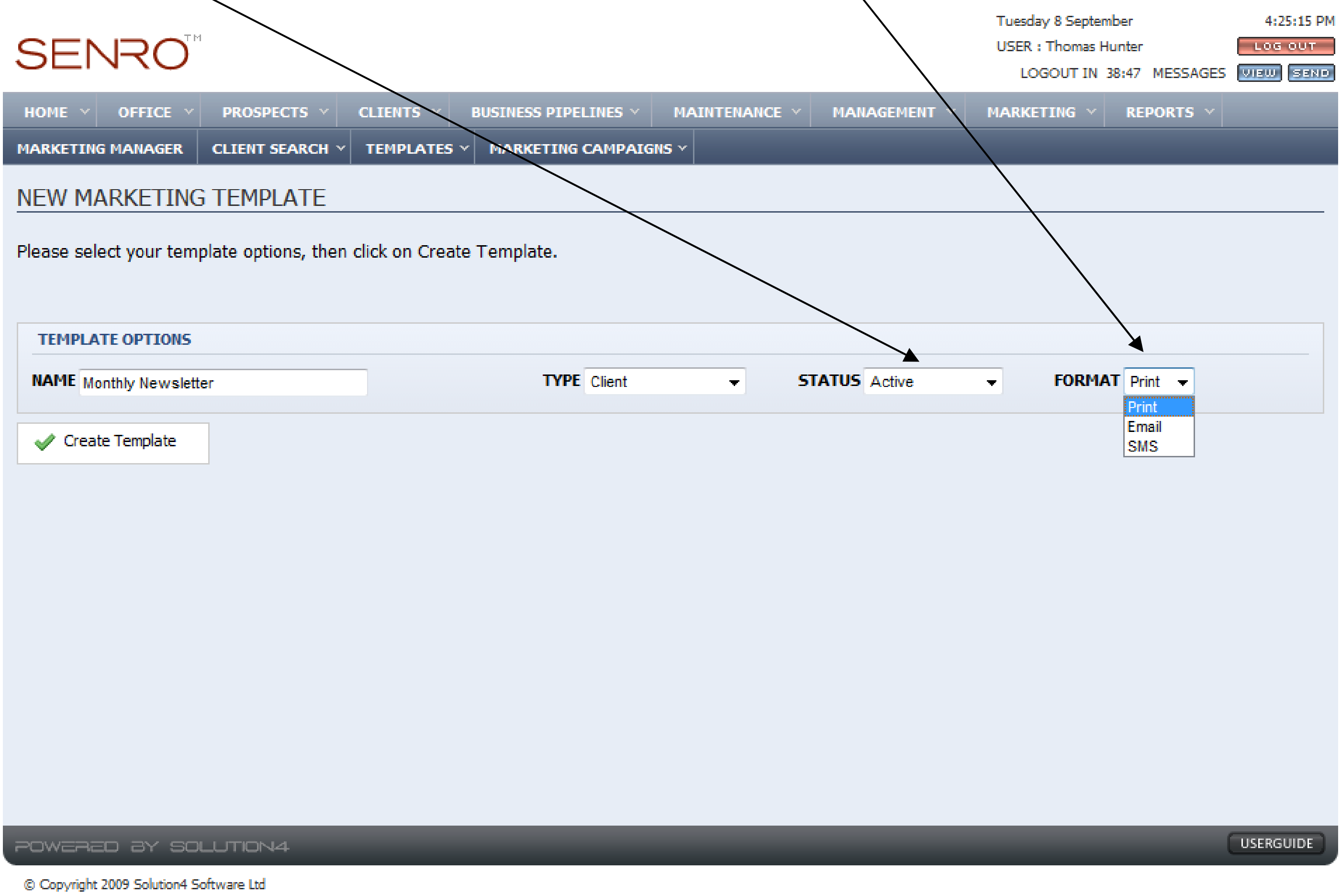
To create a valuation history of updates made to your funds, you must edit the fund and overtype /enter the new details.



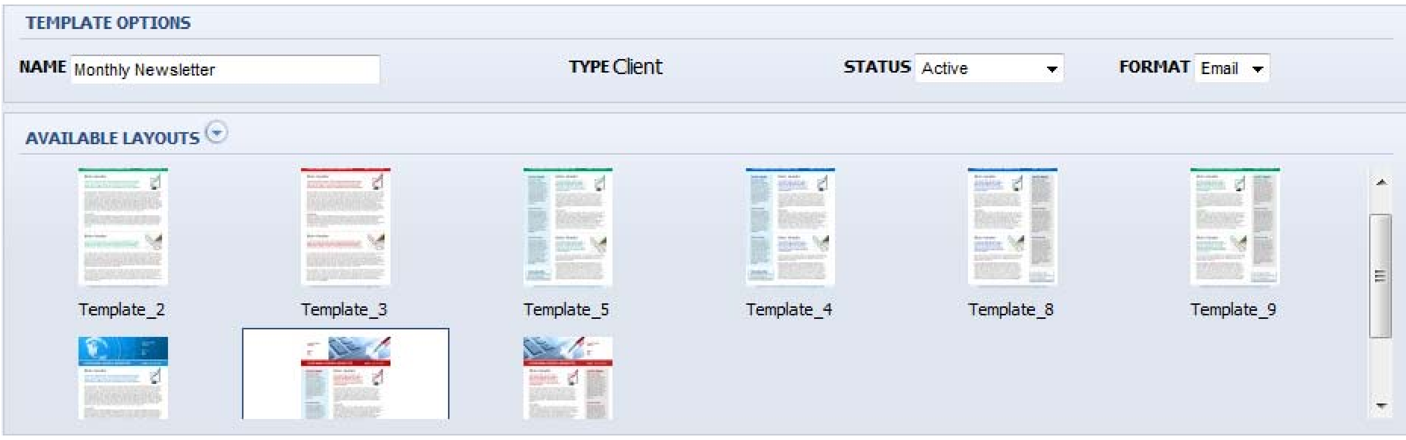
Email Marketing

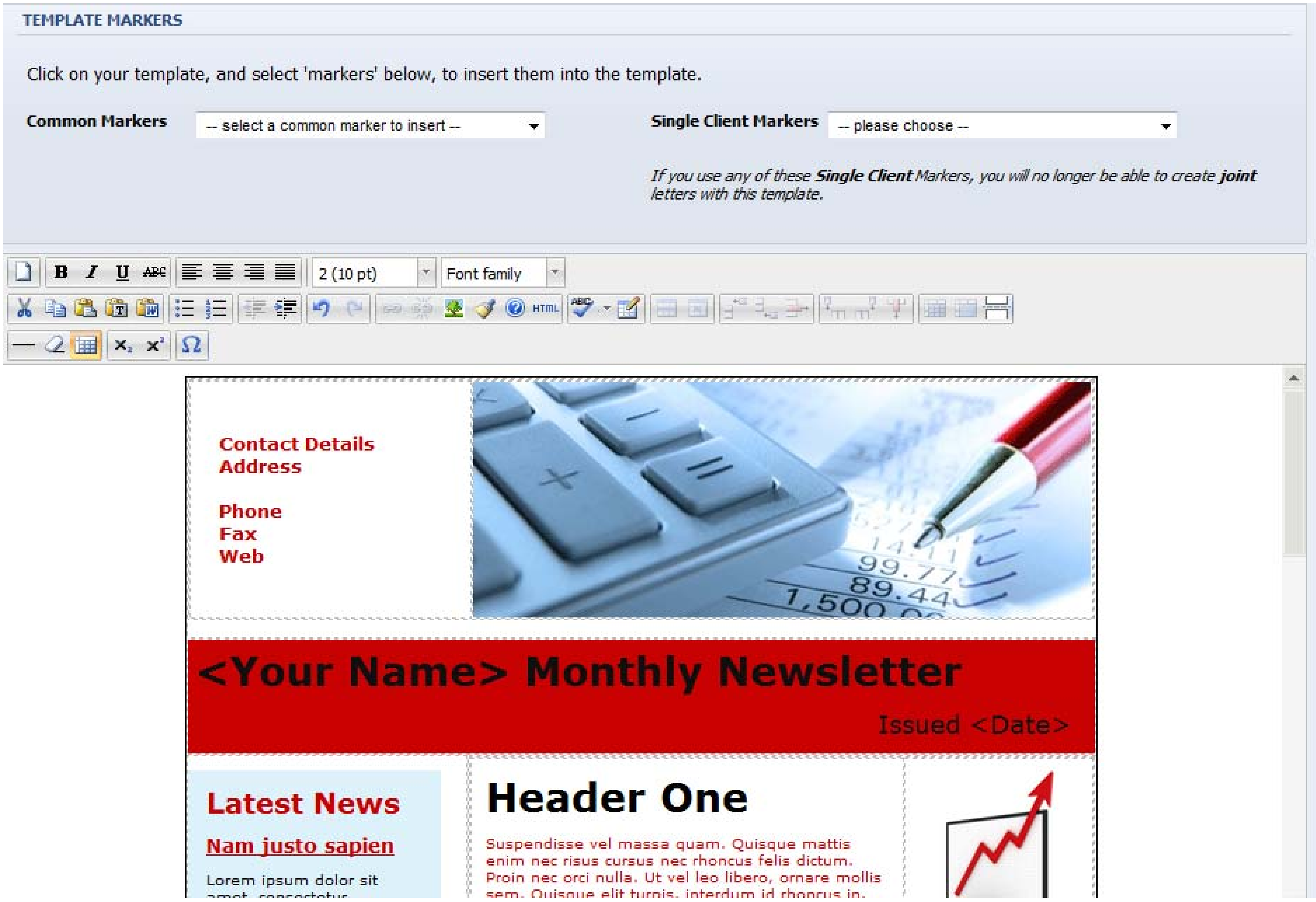
This new functionality allows you to send HTML emails to your clients; this is really useful if you want to or already produce a monthly newsletter.

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”



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.



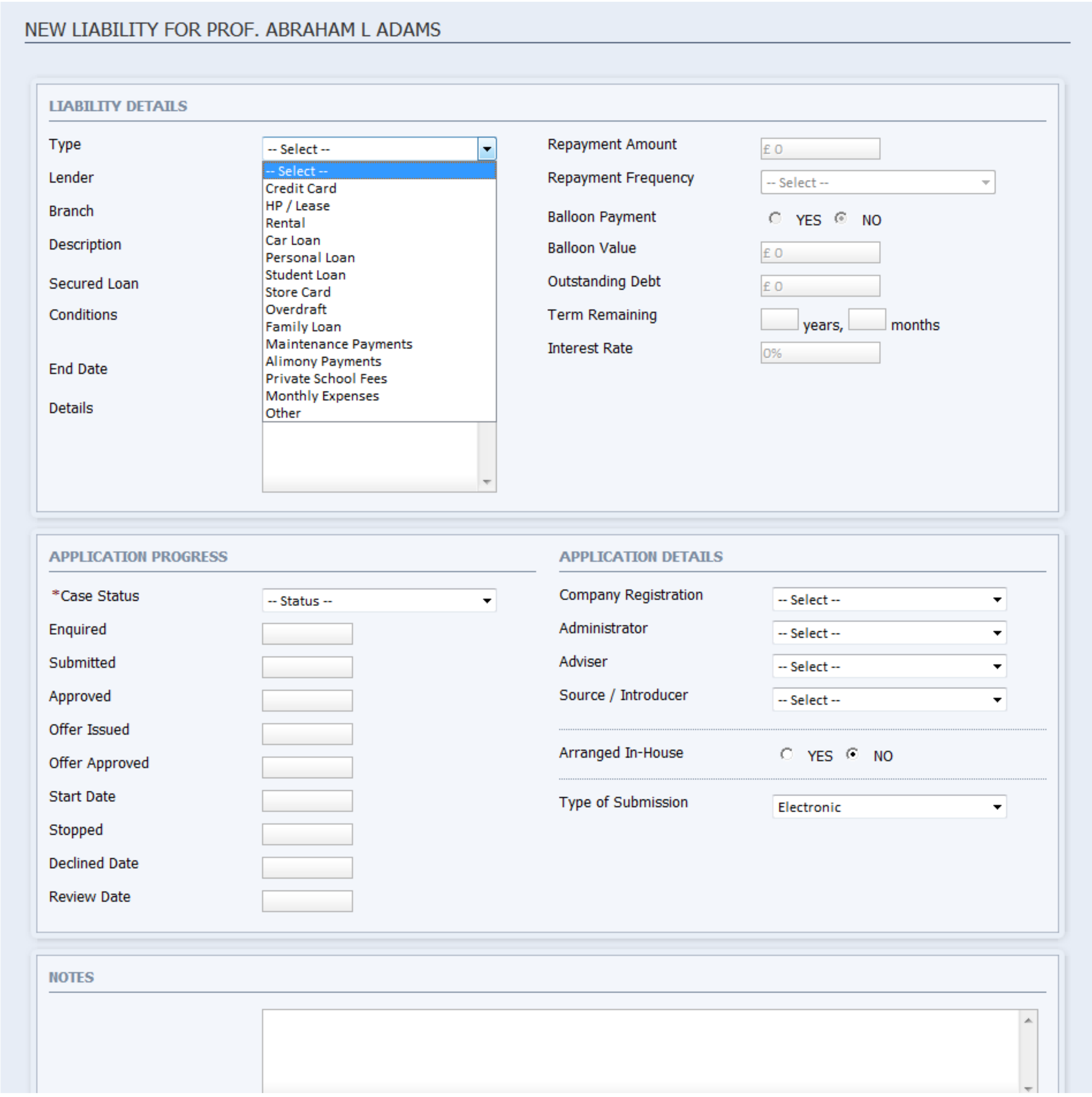


Once you have completed this save your template.

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.



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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