

Latest **SENRO** development news

It was recently announced that I was appointed in May as Sales Director of Solution4 UK. During my first 4 weeks, I spent a great deal of time talking to existing users to understand their expectations from Solution4. It's reasonable to say that a large number of users have felt frustrated in waiting for the Version 3 release.



Gary Shepherd UK Sales Director

The economy has changed and most businesses have been affected, Solution4 have not been immune to the impact of the credit crunch. The development team has been reduced from 7 to 4 developers, which has consequently affected the projects. However, the reasons for the delays have not been adequately communicated to users and I have personally promised to rectify this issue and work closely with the management and development team to provide better communication on realistic expectations for delivery.

Having worked for 1st Software, QUAY and Intelliflo over the last 10 years, I'm confident that SENRO is a market leading product and I personally feel it offers the best value for money. Version 3 has now been released to a number of users, and the feedback has been very positive. So I would like to get as many Version 2 users transferred as soon as possible. I'm aware that there are a number of projects that need to be incorporated into Version 3 to complete the deliverables promised to users during the last 12 months.

Now that the Version 3 release is complete, the development team are fully committed to completing any outstanding projects.

A number of other projects will also be managed simultaneously. On the 22nd May we released our first newsletter with some new features available in Version 3, these newsletters will now be a regular occurrence but will only announce new releases available for immediate use.

I have provided below is a detailed update on each of the outstanding projects and I will ensure a fortnightly communication is sent to all users updating them on any changes to these timelines.

I'm aware that a handful of users still are still on Version 1, as they chose not to transfer to Version 2 when it was launched. Once we've delivered the projects below to the Version 3 users, our aim will be to build the transfer script to transfer Version 1 users as quickly as possible.

If anybody would like to discuss SENRO in more detail or the support Solution4 can provide to your business, please don't hesitate to contact me:

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Openwork

Openwork OBP Integration

Solution4, like our users have been promised integration with Openwork sales process platform since late 2006. However, Openwork's decision to move from OTP to OBP meant it was not feasible for either party to build integration tools for a system that would be discontinued. We understand that OBP integration is now progressing nicely, and the Openwork portal has announced that integration with 3rd party suppliers will be launched in Quarter 4 of this year. We can confirm that we have received the integration schema and will be testing this with the development team over the coming weeks and will keep you updated on the progress.



Outlook Integration

In order to make SENRO diary compatible for 2-way Outlook Integration, a number of modifications needed to be made to the SENRO diary. For example, re-occurring events, different time-zones, appointments per minute (currently has 15/30 minute intervals), and links to the client file. Some of this work has been completed, but the development team are still making the modifications to handle re-occurring events and time zones. The Outlook Integration is the most complicated and time-intensive project, which is why most software systems don't provide 2 way integration. It is difficult to stipulate exactly how long it will take to finalise this project, but we do appreciate the urgency and how important Outlook Integration is to our users. Development will recommence in July and we will keep you updated on the progress.

MORNINGSTAR®

Fund Valuations – Morning Star Integration

Morning Star integration was developed and tested last year. The development team now need to merge the code into the main Version 3 system. This is only estimated to take 3-5 days, but a final test will need to be completed.



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Trigold integration

This development was completed last year, but now needs to be merged into the main SENRO Version 3 code. However, a number of modifications have been made to the SENRO database since the development of this enhancement took place; the development team anticipate 3-5 days additional development time, to make the necessary changes to ensure the integration is still compatible with the latest database modifications before release.

Fact Finds

The majority of the Fact Find has now been re-mapped to the current database structure. However, the tools to commit the changes made in the fact find back to the database need to be re-mapped. In addition to this we have a small number of issues reported by clients that need to be addressed before the Version 3 release can be made. The development team have estimated 3-4 weeks to complete any refinements and fixes in Version 3.



Email and SMS Marketing

The work for email and SMS marketing was completed and tested last year locally by the development team. However, over the last few weeks the UAT team have completed some extensive testing of all marketing letter markers and search filters to ensure they are all selecting and filtering properly in preparation of the new launch. Over the next couple of weeks the development team will be uploading the marketing section to main server so they can test the distribution of emails, including a spam check. The final testing is estimated to take 10 days.



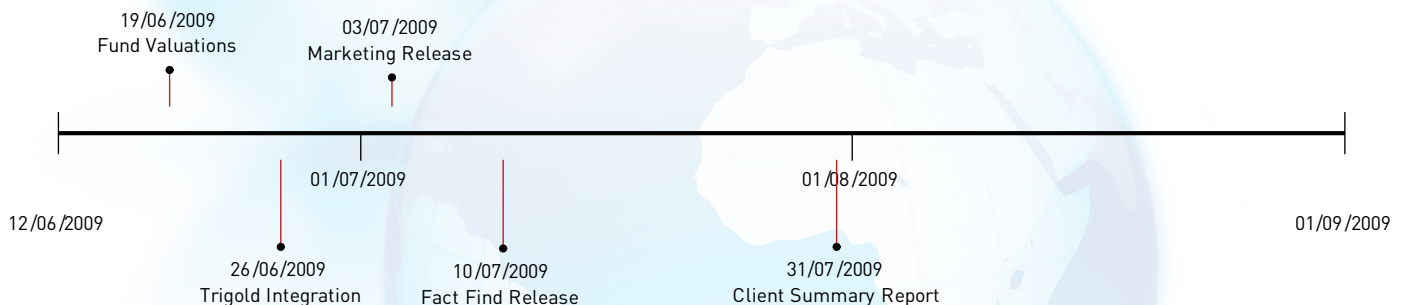
Client Summary Report

The majority of the Client Summary Report was built last year. However, the issues relating to the Version 3 release took priority and this project was put on hold. The ability to create a word or PDF version of an existing client's portfolio had been completed. The development team now need to finish mapping the fields from the existing arrangements into the Client Summary Report. The outstanding work is estimated to take 2-3 weeks.



Development timelines

Release dates for Outlook integration and OBP release to be provided as soon as possible.



Please note: These timelines are based on estimations only and cannot be guaranteed. However, we will keep you regularly updated on any changes.

