



SYSTEM FUNCTIONALITY SENRO

CRM CAPABILITIES

Online Access	✓
Full Support and Hosting	✓
Lead and Referral Management	✓
Opportunity and Prospect Management	✓
CSV Prospect Upload	✓
Private & Commercial Client CRM	✓
Pipeline Management	✓
Data Capture Mortgages and Finance	✓
Data Capture Properties and Assets	✓
Data Capture Protection Products	✓
Data Capture Financial Planning	✓
Communication Tools	✓
Diary Tools with Outlook Integration	✓
Document Storage	✓
Internal Messaging System	✓
Full Diary Management Tools	✓

MARKETING

Reports and Dashboards	✓
Full CRM Data Analysis and Extraction Tools	✓
Letter, Email and SMS Campaign Tools	✓
SMS Marketing	✓
Email Campaign Monitoring Tools	✓
HTML Marketing Tools	✓
CSV Exports	✓
Promotion and Event Management	✓

SYSTEM FUNCTIONALITY SENRO

MANAGEMENT & CONFIGURATION

Call Centre, Head Office, Company and	
Introducer Access Levels	✓
Full Navigation and Function Controls	✓
System Customisation Tools	✓

REPORT AND ACCOUNTING TOOLS

Performance Analysis and Reporting Tools	✓
Full Fee & Commission Reconciliation	✓
Electronic Fee Verification and Reconciliation	✓
7 Tier Commission Structure	✓
Claw back and Commission Risk Management	✓
Trail & Renewal Fee Tracking	✓
Performance Tracking	✓

LEAD MANAGEMENT

Advanced Customer Duplication Check	✓
Opportunity Allocation Engine and Tracking	✓

3rd PARTY SYSTEM INTEGRATION

Integration with Trigold	✓
OBP Integration	✓
Customised 3 rd Party Integration (E.G. Integration with Openwork Network Today)	✓

POINT OF SALE SYSTEMS

Fact Find and Needs Analysis	✓
TCF Audit Trail and Compliance Tools	✓
Source Management	✓

