



# The survival guide for financial services



## New Upgrades and Wish List Report Version 3.0 inclusions – 22<sup>nd</sup> May 2009

We're delighted to confirm the following enhancements have been released on Version 3.0 today.

No	Section	Page	Description
1	Management	Impersonate	<p>Practice Principals can now log in as other users but using the new 'Impersonate' tool in management. This means you can experience the system from other users viewing rights without having to use their username and passwords.</p> <p>We have restricted this access to Practice Principals only and they cannot impersonate another Practice Principal.</p> <p>This functionality has been very useful for the Solution4 support team when testing SENRO and providing support to different users. It doesn't compromise security as passwords don't need to be disclosed or changed. Therefore, it's now been released for Practice Principals, who we hope will also get great benefit from this new tool.</p>
2.	Pipelines	Mortgages	<p>A number of clients have requested the ability to see the property addresses in the pipeline.</p> <p>We're pleased to confirm that the Mortgage Pipeline now has a 'Show All Securities' button at the bottom of the page, which will list all property addresses and assets used as security under each mortgage record.</p>
3.	Marketing	Templates / Filters	<p>Our team have undergone extensive testing of the marketing section implementing new markers, testing existing ones and ensuring the language used is consistent between the dropdown menus and field names.</p> <p>Over the next few weeks you will see new changes being made each week to the marketing filters and letter templates markers.</p>
4.	Marketing	Labels	<p>We received a number of calls regarding the marketing labels not fitting the correct size. I'm pleased to confirm the labels have undergone modifications to make the printing of labels more accurate. We still recommend you print a test page, before printing a full batch. Please see the attached guide on printing labels before using.</p> <p>Labels have also been enhanced; you now have single and joint options.</p>

Since 2006, we've been collecting all your individual requests and logging them in our internal 'Wish List' system. Some of these requests are minor refinements and others major enhancements, but they are all taken seriously and regularly reviewed.

It's very important that you keep us updated and tell us what you want to achieve from SENRO because our development schedule is determined by the volume of requests we receive, so each one counts.