



The survival guide for financial services



SOLUTION4
THE FINANCIAL SERVICES ENGINE

SYSTEM FUNCTIONALITY	SENRO	SYSTEM FUNCTIONALITY	SENRO
CRM		Business Builder	
Online Secure Access	✓	Database Analysis and Reporting Extract	✓
Multi User Access and Viewing Controls	✓	Search Filters	✓
Call Centre and External Introducer Access	✓	Campaign Generator	✓
Prospect Import Tools	✓	Campaign Monitor & Communication Tracking	✓
Opportunity Allocation	✓	Campaign Templates (Print/Email/HTML/SMS)	✓
Client Relationship Management	✓	Event Management	✓
Address and Credit History Records	✓	Promotion Management	✓
Client Portfolio Management	✓		
Mortgage Data Capture	✓	Peak Performance	
Property / Asset Data Capture	✓	Performance Reporting	✓
Insurance / Protection Data Capture	✓	Task Reports	✓
Pensions / Investment Data Capture	✓	Outstanding Commission and Fee Report	✓
Pipeline View	✓	Commission CSV Import Tools	✓
Prospect and Client Notes	✓	Full Commission Reconciliation	✓
SMS / Email Communication Tools	✓	Commission Statements / Invoicing	✓
		Rules Engine for Commission Structures	✓
Office Manager		6 Tier Commission Structure	✓
2 Way Outlook Integration	✓	Adviser Financing Tools and Statements	✓
Online Appointment Calendar	✓	Claw-back and Commission Risk Management	✓
Internal Message Book	✓	Arrears Management	✓
Workflow Diary	✓	Mortgage Balance and Servicing Statements	✓
Opportunity Management	✓		
Website Integration for Leads	✓	Platinum Business	
Letter / SMS and Email Generator	✓	Integration for Electronic Lodgement	✓*
Document Storage	✓	Morning Star Integration	✓*
Task Management	✓	Status Back Channelling	✓*
Review Date Management	✓	Online Credit Reports	✓*
Pipeline Chase Management	✓	Online Valuation Reports	✓*
Alert Configuration and Management	✓	* Platinum Business Coming Soon	
Point of Sale System			
Offline Access (All Point of Sale Tools)	✓		
Configurable Fact Finds	✓		
Mortgage Product Searches	✓		
Serviceability Calculators	✓		
Split Loan Product Searches	✓		
Full Product Qualification	✓		
Stamp Duty Calculations	✓		
Printable Product Comparisons / Summaries	✓		
Lender Document Library	✓		
Quick Product Search Tools	✓		
Credit Card Searches	✓		
Personal Loan Searches	✓		
Insurance Cover Searches	✓		
Financial Planning Calculators	✓		
NCCP Documentation & Management	✓		