



The survival guide for financial services



Solution4 SENRO Release V4.3.1 – 14th January 2011

Dear SENRO Users,

We're pleased to confirm that v4.3.1 will be released on 14th January 2011. For further information please refer to the user-guide or the support team.

CHANGES AND ENHANCEMENTS

Lead Management Changes

Change Number	Section	Page	Details	Reason/Benefit
5722	Prospects	Prospect Imports	New warning messages in Prospect Import regarding mandatory fields	Fields 'Branch' and 'Source mode' are mandatory when Importing Prospects. This is to ensure viewing right permissions can be applied. This means imported files must contain these fields and the correct relationships with advisers to branches, and source modes to source configuration.

Sales Process Changes

Change Number	Section	Page	Details	Reason/Benefit
5066	Sales Process	Fact Find	A number of new fields have been added to the Fact Find and questions have been reordered.	To allow more data capture to support a compliance sales process and ease of navigation through the Fact Find. Please refer to the Fact Find Questions spreadsheet for more information on each change.
5550	Sales Process	Applications	Back To Advice Button	To allow the user to easily navigate back to the Advice and Recommendations page from the Application form.
5761	Sales Process	Serviceability Calculators in Mortgage Product Searches	New fields have been added to Serviceability for Tax deductible loans and percentage ownership.	To improve the accuracy of the calculations for lender specific maximum borrowing capacity.
4935	Sales Process	Mortgage Product Searches	New navigation	A new navigation has been added to POS to assist the user with completing a Mortgage Product Search by clicking on the arrows to navigate to the next step.
	Sales Process	Advice and Recommendations	New navigation	A new navigation has been added to the Advice and Recommendations page to assist the user in understanding the Sales Process for an opportunity.



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Management Changes

Change Number	Section	Page	Details	Reason/Benefit
3545	Call Centre	Call Centre Staff	New 'Back to Call Centre Details' button added to Call Centre Staff	Ease of navigation from Call Centre Staff profiles back to Call Centre details.

Commission Changes

Change Number	Section	Page	Details	Reason/Benefit
5085	Accounts	Import Templates	'Date Paid' filter option included	To allow the user to Import a date that a commission payment was received that is different to the day the file is imported.
5379	Accounts	Fee Account Balances	The ability to export Fee Account Balance report into Excel	To enable greater reporting, sorting and filtering capabilities of commission data in excel.