The survival guide for financial services

SOLUTION4
THE FINANCIAL SERVICES ENGINE

Solution4 SENRO Release V4.2 – 23rd November 2010

Dear SENRO Users,

We're pleased to confirm that v4.2 will be released on 23rd November 2010. Further information and instructions and user-guides will be provided next week, prior to the release.

CHANGES AND ENHANCEMENTS

Lead Management Changes

Change Number	Page	Section	Details	Reason/Benefit
3968	Management	Single Ownership Transfers	The clients name has been added to the 'Single Ownership Transfer' page.	Clearer visibility on the transfer details.
3556	Create & Match	Search Results / Create New Opportunity	Tick Box for Warm/Cold Handovers	When creating a new opportunity you can now data capture if the lead is considered a warm or cold handover to the adviser.
3929	Office	Opportunity Management	Shortcut from Opportunity Manager to convert a prospect to a client.	You can create an 'Advice Record' from the Opportunity Manager, enabling you to quickly create a new fact find. However, you can only create an advice for 'Clients'. Therefore, to make the process seamless we have added a 'Convert To Client' button from the Opportunity Manager for Prospects. Once you complete the process you will finish back in the Opportunity Manager enabling you to 'Create the Advice' and get to your fact find without going through the navigation.
3928	Office	Opportunity Manager	Create / Link Appointments from the Opportunity Record	If you manage your leads from the Opportunity Manager, you can create appointments, link existing appointments or access the appointment calendar without leaving the Opportunity record.
3939	Create & Match	Opportunity Record	Dropdown for Preferred Contact	If you have a joint opportunity record, you can now select the preferred contact.
3621	Office	Opportunity Manager	Opportunity Statuses have been enhanced to automatic status changes.	The status of an opportunity has been upgraded to include the following options:- Assigned Allocated Contact Cancelled Application Submitted
4158	Office	Opportunity Manager	Outcomes linked to Opportunity Status	Label configuration has been updated so 'Outcomes' relating to Opportunities can now be linked to an 'Opportunity Status'. This ensures you get accurate reporting, as the 'Outcomes' available to the adviser will be based on the 'Status' they select.

Sales Process Changes

Change Number	Page	Section	Details	Reason/Benefit
3392	Sales Process	Advice and Recommendations	Create / Link Appointments from the Advice Record	If you manage sales from the Advice and Recommendation record, where you can create Opportunities and Fact Finds, you can now also create or link appointments, or access the appointment calendar without leaving the Advice and Recommendation record.
3344	Sales Process	Advice and Recommendations	New Appointment Table	A table was added to the 'Advice and Recommendation' to display linked appointments. This means you can view more activity surrounding the advice.
3506	Sales Process	Advice and Recommendations	Now displays the cancelled fact finds in the fact find table, not a pop up.	This gives you visibility on historical activity in a single view.
3509	Sales Process	Fact Find	New Changes to Fact Find, including menu changes, new questions, calculators and pop ups in the summaries.	The fact find has been significantly enhanced to include new pages, questions, calculators and pop up screens in the summary page for validation. The new fact find enables you to complete a compliant needs analysis and application form.
3507	Sales Process	Fact Find / Advice and Recommendations	You can now reactivate a cancelled fact find.	**NOTE:** You cannot activate a cancelled fact find on the advice, if an active fact find already exists. Only one fact find can be active at any time for each advice record.