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It's Spring Cleaning Time!

There's a lot to be said for the notion of Spring Cleaning. It's a good time of year to rout out the dirt, dust and disorder that's crept into the home since the holiday season. But Spring Cleaning can also be renewing for offices, and yes, even technology! By doing a thorough Junxure clean-up and data check you'll benefit from more efficient operation throughout the year. Below are some Spring Cleaning tips and techniques that you can use to help clean-up and further optimize your Junxure database.

Contact Record Clean-Up

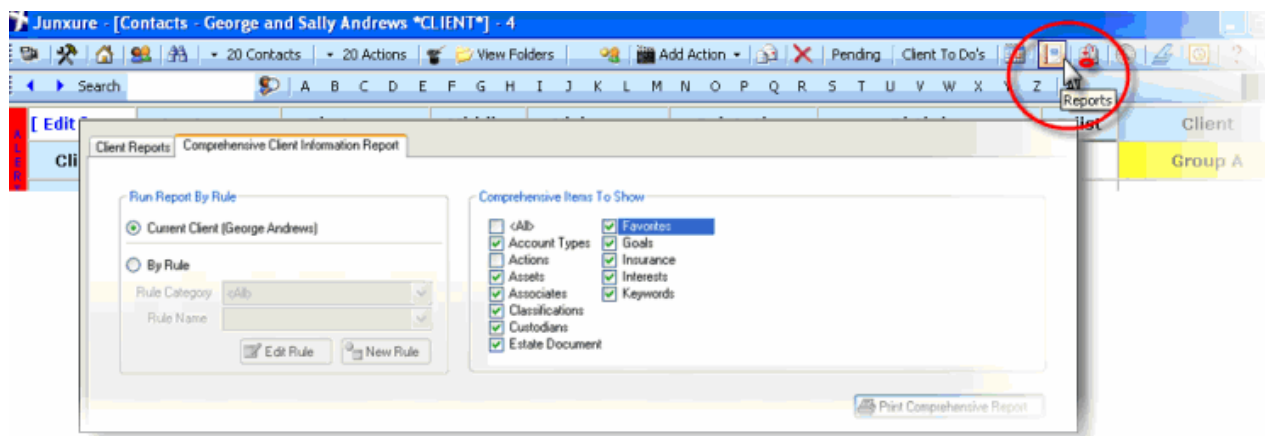
Check the System for any Duplicate Clients

The **View Duplicate Clients** functionality within Junxure [**Main Menu->Database Tools->Data Cleanup/Correction->View Duplicate Clients**] will provide you a list of potential duplicate contact records. If you find any duplicate contacts you can choose to either delete the duplicate record, or merge the duplicate records together.

Perform Client Data Checks

The information that is entered and stored in each contact record enables functionality in different areas of Junxure. Performing regular data checks to ensure all records are complete will benefit your firm when using features such as the Rules Builder, Report Wizard, Searching for Contacts and even the Global Email and Letter/Envelope Wizards. Here are a few basic ways you can perform data checks for your contacts.

- A **Comprehensive Client Information Report** can be run for each individual contact, or a group of contacts, and used to review specific information from within the contact record. To access this report, click on the Reports icon within the contact record and select the boxes for the information you would like to view.



*Note: if you choose to show **Actions** on your report, the report may be rather long as it will include the entire actions history for the selected contact(s).

Classifications and Keywords

Classifications and Keywords are designed to help your firm add additional detail to your contacts and are used when grouping like contacts together within the Rules Builder. Depending on who has access to add new classifications and keywords to Junxure, you may find that some are duplicates, some are spelled incorrectly, one or more may mean the same thing but are entered differently, some on the list haven't been used and even some contacts don't have a classification at all.

- The **Data Checks Report [Main Menu> Reports->Reports List->Data Checks]** allows you to identify those contacts that do not have a Classification assigned to the contact record.

Actions Cleanup

Update Actions That are Missing a Type, Process or Action keyword

Identifying specific details about an action and entering a Type, Process and Action Keywords in the action detail window allows office staff to quickly and easily search for actions later on. Actions that are missing these specifics are more difficult to find among a historical list of actions for a contact.

- To identify pending actions missing a Process you can use the **Actions Dashboard feature [Main Menu->Reports->Actions Dashboard]** and view the pending actions by process. By choosing **No Process Name** a list of all pending actions with no process will appear in the grid below. This is an actionable grid so you can simply double click on each action, go into the action detail window and add a process to each action.

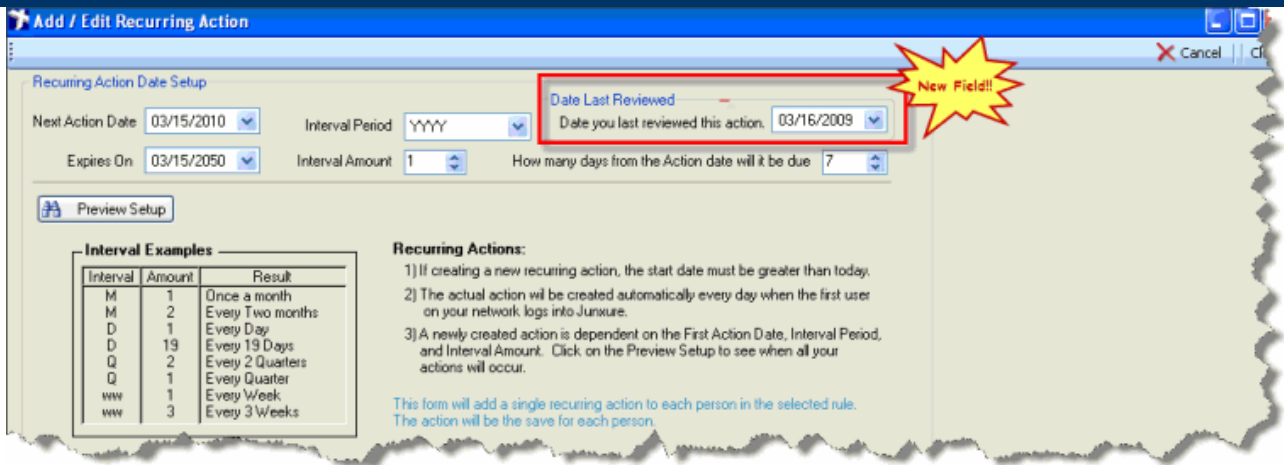
The screenshot displays the 'Actions Dashboard' in the Junxure ABC Financial application. It features a navigation menu on the left with options like 'People', 'Letters', 'Reports', 'Database Tools', 'System Setup', and 'Maintain System'. The main area is divided into three summary sections: 'Clients - 40 Clients with Actions', 'Employees - 7 Employees with Actions', and 'Processes - 40 Processes with Actions'. The 'Processes' section is expanded to show a list of processes, with '<No Process Name>' selected. Below these sections is a main data grid with columns: Client, Date Du, Days, Assigned To, Note, Action Description, and Follow Up Note. A notification box on the left indicates the last backup was on 3/3/2009 at 9:00 AM, 24 days ago.

ID	ClientName	# Pending	ActionAssignedTo	Employee	# Pending	Process Name	# Pending
1	Northgate Partn..	12	0		1	<No Process Name>	47
2	Smith, Sam	13	2	<Client>	8	Account Administrat...	96
3	Miller, Josephine	58	17	Jeff Jones	98	Account Transfer In	47
4	Andrews, George	75	1	John Smith	78	Address Change	1
5	Samson, Michael	22	4	Julie Cochrane	303	Applications - Broke...	2
6	Lawyer, Reginald	2	3	May Doe	73	Applications - RIA	1
7	Barnes, Debo...	3	5	Trevor Jones	75	Capital Needs Model	1
8	Barnes, Richard...	5				Client Address Cha...	7
9	Andrews, Jeff	3				Client Meeting	25
219	Jones, Mary	2				Compliance	41
243	TRAINING TES...	10				Correspondence	15
244	Guidry, Kelly	7				Deliverable	14
245	Elms, Donald	7				Deposits/Withdraws...	9
246	Hickman, John	5				Education	3
250	Colombo, Corinna	5				Estate Planning	2
						Feasibility Analysis	1

Client	Date Du	Days	Assigned To	Note	Action Description	Follow Up Note
Colombo Corinna	03/31/2009	4	Cochrane J			
Andrews George	03/19/2009	-8	Cochrane J	Appointment made in Outlook		
Andrews George	12/09/2008	-108	Cochrane J	12/8/2008 2:38:36 PM		
Miller Josephine	06/18/2008	-282	Doe M	Send stmt to Rob based on email	Handle This Email	
Andrews George	05/27/2008	-304	<Client>	5/19/2008 10:04:20 AM	she emailed and want...	
Miller Josephine	05/27/2008	-304	Jones J	5/22/2008 10:31:15 AM Enter note about george won lottery		

Review Recurring Actions to Determine if They're Still Valid

NEW FIELD Junxure has added a new field to the Add/Edit Recurring Action window. Once you've reviewed the recurring action you can now enter in the date to show when this action was last reviewed. For any action that is no longer applicable you can either change the expiration date or delete the recurring action from the recurring actions tab for that contact.



Documents Clean-Up

Cleanup Document Folders

Junxure may have been installed with default folder categories viewable in the Documents tab. If your firm does not utilize some of the default folder categories, they can be deleted to reduce clutter or possible confusion. Take time to review **[Main Menu->System Setup->Build File Folders]** and delete those folder categories that you are not using and create additional folders and/or sub-folders that are more specific to your firm.

Junxure will be offering a one-time "Spring Cleaning" Web-Based Class in May to review the different ways for you to easily review and monitor your Junxure data on a regular basis. See more details below. Remember, the information output from Junxure is only as good as the information you input.

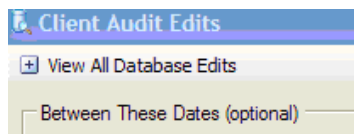
How to limit the Junxure file size growth

Most Junxure offices were installed with a free version of Microsoft SQL Express, which is the "Server" side of Junxure that houses the database. Free versions of Microsoft SQL server come with a limit to how big your database can grow before you will need to purchase a fully licensed version of Microsoft SQL server.

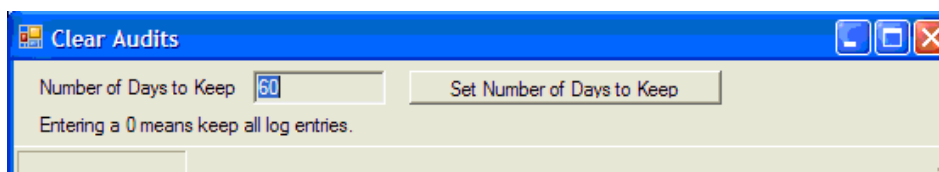
The main cause of Junxure database growth is the **Audit log** that you can view from **Database Tools ->Data Cleanup and Correction -> View Edits**. This is a log of all data that has been changed in Junxure, including where and when the changes were made and by whom. For example: if a user changes a phone number in a contact record, the audit log will make an entry for the change, storing the old value and the new value. Over time, this can become a very large log, especially when you have used Junxure for a number of years.

How do you limit the size of the Audit Log?

From **Database Tools->Data Cleanup and Correction-> View Edits**, you will see a button at the top that states "Clear Audits . . ." or "Set number of days" depending on the version of Junxure you are running. Users on the most recent versions will need to click on the "View All."



Clicking that will prompt the user for the Admin password for Junxure. Once you have entered the admin password, then you will be presented with a form in which you will be able to set a number of days to keep this audit history.



Once you have set a number here, then Junxure will clear out all Audits older than the number of days specified. It will continue to do this on an ongoing basis, limiting the size that the Junxure database file will grow to and assist you in keeping costs down by not needing to purchase a more capable version of SQL Server. In addition, this will greatly reduce the size of the Junxure database backups, which can save space

on the server, as well as save on external backup costs.

Happy Spring Cleaning!!

Live Spring Cleaning Class via WebEx

New *Thursday - May 7th, 2009 / 2pm (Eastern)
Spring Cleaning in Junxure*

The tips and techniques shared in this newsletter are only some of the many ways for you to ensure the information and data in Junxure is complete and current. Junxure will be offering a one-time "Spring Cleaning" class in May which has been designed to take you through a more comprehensive data clean up of your Junxure database. This class will review these features in detail as well as review clean-up techniques utilized by other offices, including Greg Friedman's office.

This Web-based training class is presented live by an experienced trainer for one hour. Your office will gather at a computer to watch Junxure in action as the trainer provides you step-by-step instruction via the Internet and a conference call. The phones are left open the entire time, so you can ask questions whenever you'd like.

There will be several offices participating in each training class simultaneously. You will be able to hear all questions and answers during each class.

If you have questions about this class, please do not hesitate to give us a call at **1-866-586-9873, Option 5.**

IMPORTANT - THIS CLASS IS NOT FOR THE NEW USER OF JUNXURE - IT IS DESIGNED FOR THE USER WITH BASIC PROFICIENCY WITH THE JUNXURE PROGRAM. THIS CLASS IS ONLY OFFERED ONCE PER YEAR.


Pricing: \$150 per class or \$625 for 5 Continuing Education (Advanced) Classes



[Click to View Class Schedule or Register](#)

Upcoming Junxure Web-Based Classes

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
April 5	April 6	April 7	April 8	April 9	April 10	April 11
		Key Person 1	Key Person 2	Key Person 3		
April 12	April 13	April 14	April 15	April 16	April 17	April 18
		Key Person 4		Key Person 5	New CONTINUING EDUCATION: Successful Seminar and Event Planning	
April 19	April 20	April 21	April 22	April 23	April 24	April 25
		Gen Staff 1	CONTINUING EDUCATION: Handling Meetings in Junxure*	Gen Staff 2		
April 26	April 27	April 28	April 29	April 30	May 1	May 2

		General Staff 3	General Staff 4	General Staff 5	CONTINUING EDUCATION: Actions Reporting in Junxure*	
May 3	May 4	May 5	May 6	May 7	May 8	May 9
	Key Person 1	Key Person 2	Key Person 3	 CONTINUING EDUCATION: Spring Cleaning in Junxure*		
May 10	May 11	May 12	May 13	May 14	May 15	May 16
	Key Person 4	Key Person 5	Gen Staff 1	Gen Staff 2	Gen Staff 3	

Version 7.0



Junxure

[Click to View Class Schedule or Register](#)



*CONTINUING EDUCATION CLASSES ARE NOT FOR THE NEW USER OF JUNXURE - THESE CLASSES ARE DESIGNED FOR THE USER WITH A BASIC PROFICIENCY WITH THE JUNXURE PROGRAM