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**Junxure in Color**

Color options in Junxure won't challenge your "color palette", but color can be used to help you to highlight important "need to know" information, distinguish specific details, improve readability, and increase your overall efficiency.

**All About RED**

***Alert Classification***

On the **Personal Info** tab, you have the ability to add notes in the **Important Information** sub tab as shown below circled in Red. This information is generally information that you would like to make sure that the entire office is made aware of. Throughout the program, there are a few places where the important information text will appear, including on the **Dashboard Tab** and in any of the contact preview windows in the **People/People** menu. Another area where this text appear is in an **Alert Notification** box, but only if it is activated.

Dashboard Contact Info **Personal Info** Profile Actions Associates

**Edit Personal Information**

Initials	G.H.A.
Title	Owner
Web Page	http://
SSN	222-22-2222
Assistant's Name	June Johnson
Assistant's Phone	(555) 565-5555
Driver's License #	4555678
D.L. Issue Date	4/17/2007
D.L. Expiration	4/17/2012
Passport	
Passport Expiration	
Citizenship	USA
Gender	M
Marital Status	Married
Job Title	

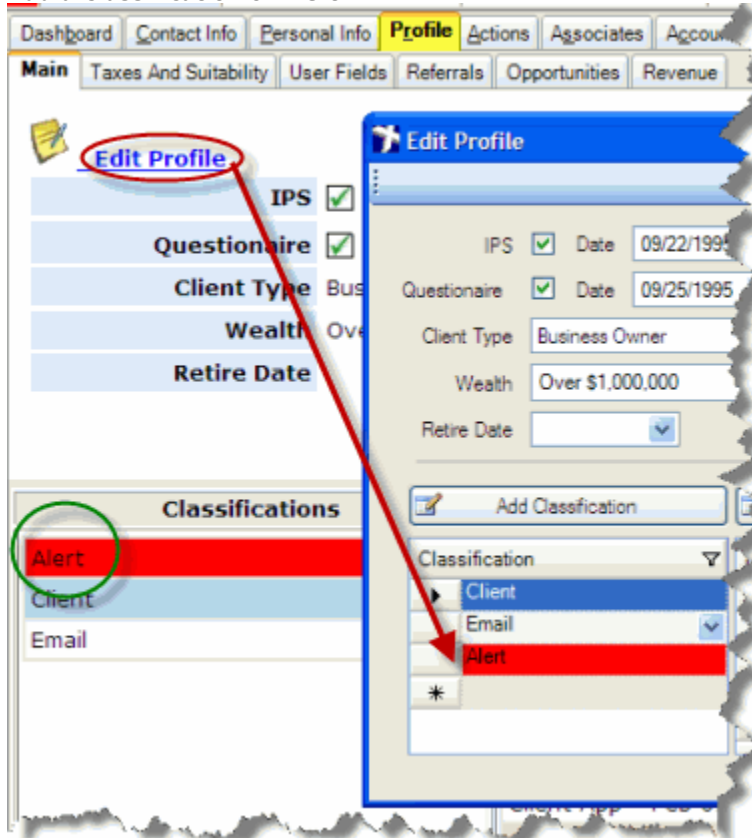
Important Info Billing Note Account Review Note Additional Notes Favorites

George's Mom has been ill, be sure to ask how she is doing - md 7/20/09

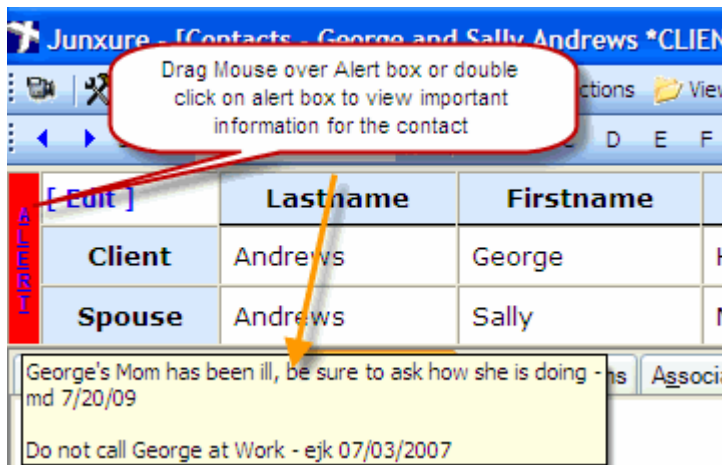
Do not call George at Work - ejk 07/03/2007

To activate the Alert Notification box for a particular contact, go to the contact's **Profile Tab**, and then add a Classification of **Alert**. This will activate a **RED** Alert notification on the left hand side of the Contact Header Bar. If a Classification of Alert is not available in the drop down list on the profile tab, then it will need to be added to the Classification area in [List Data Maintenance](#) first.

### Add a Classification of Alert



**RED** Alert Notification Feature Activated



Once the Alert Notification box is activated, if you drag your mouse over the alert box, or if you double click on the alert, the text from the notes on the **Important Info** box on the **Personal Info** tab will appear.

## Birthday Notification

As a quick reference, on the **Contact Header Form**, when a birthday is within 2 weeks of the current date, the birthday field will turn red as shown circled in **red** below. This will help bring this fact to the attention of the office staff allowing them to acknowledge the contact's birthday and even engage in conversation about special plans they have/had to celebrate the special day.

[ Edit ]	Lastname	Firstname	Middle	Nickname	Salutation	Birthday	B list
Client	Andrews	George	H.	Bub	Mr.	7/30/1954 (55)	<input checked="" type="checkbox"/>
Spouse	Andrews	Sally	M.		Mrs.	6/30/1957 (52.1)	<input checked="" type="checkbox"/>

## Vacation Notification

Sometimes, it may be important to notify your office staff that a client is on vacation so that anyone trying to contact the client will look to use alternate communication methods or wait to contact the client after they return from vacation. On the Personal Info tab, when you enter a client's vacation departure and return dates as circled in red below, you will activate a **red Vacation Notification** box which is then viewable in three different areas of the program.

1. On the client's **Contact Info** tab.
2. In the **Main Menu** search preview windows
3. In the **Action Detail** screen, just above the phone number.

Note: The vacation notification will automatically de-activate when the vacation end date has passed.




**To Modify the Vacation Start & End Dates, Make Sure you Click on the "Edit Personal Information" Link as Shown by the Gold Arrow Below.**

The screenshot shows the 'Edit Personal Information' tab in the ClientView software. The interface includes a navigation bar at the top with tabs like 'Dashboard', 'Contact Info', 'Personal Info', 'Profile', 'Actions', 'Associates', 'Accounts / Assets', 'Insurance', 'Cash Flow', 'Documents', 'Estate', and 'Financial Planning'. The 'Personal Info' tab is active. Below the navigation bar, there is a section for 'Edit Personal Information' with a gold arrow pointing to the link. The main content area is divided into several sections: 'Client' and 'Spouse' information, 'Wedding Anniversary' (6/20/1987 (22.1)), 'State of Residence' (CA), 'Spouse State of Residence' (CA), 'Binders' (Financial Planning: 1/5/2001, Note: This was full FP; Client Plan: 9/26/1995), and 'Use this field to track your internal client code.' (Junkure Code, Accounting Code: ANDGS01, Vacation Start: 8/1/2009, Vacation End: 8/31/2009, ClientView: ). The 'Vacation Start' and 'Vacation End' fields are circled in red.

### Main Menu Search Preview Window

Client ID:	4 [Text]
Name:	<b>George Andrews</b>
Nickname:	Bub
Spouse:	Sally Andrews
Company:	Andrews Tools Performance Technologies
Client Type:	Business Owner
<b>Client Phones</b>	
<b>Client On Vacation 8/1/2009 - 8/31/2009</b>	
Business	(666) 777-8980
Business 2	(888) 555-1212
Business Fax	(555) 666-7878
Business?	(555) 666-7767

### Contact Info Tab & Action Detail Window

<b>Client On Vacation 8/1/2009 - 8/31/2009</b>		
	<b>Phone Numbers</b>	
<b>Type</b>	<b>Number</b>	<b>Pri</b>
George office	(666) 777-8980	<input checked="" type="checkbox"/> 
Business 2	(888) 555-1212	<input type="checkbox"/> 

## Other Colors in Junxure

### *Color Coded Keywords*

You can assign a color and a priority to any of the keywords added to the profile tab. This will help draw attention not only to top priority keywords displayed at the top right of the contact record, but also to keywords that appear in the keyword list on the profile tab.

Keywords on the Profile Tab

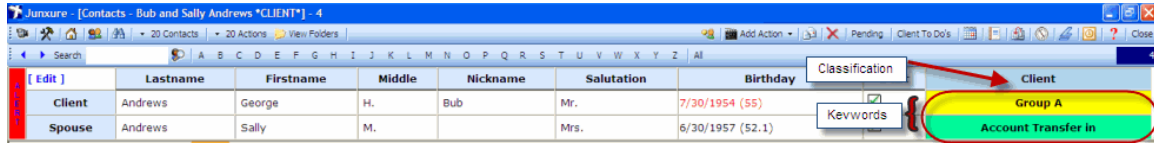
Keywords
Account Transfer in
Charity
Christmas2006gift
Client App - Feb 09
Discretionary
Estate Planning
Financial Plan
Group A
Market Updates
Meet Freq-Q
Mnylnk Withdrawl
MonthlyReports
Newsletter
Retirement Planning
RP Seminar Invitee Feb09
RSVP Seminar May 09
Tax Planning
TaxableAccts

When you add a prioritized/color coded keyword to a contact on their profile tab, the two highest priority keywords will appear as colored boxes on the top right hand corner of the main **Contact Header Form** for each contact. In the example circled in red below, the keywords, "Discretionary" and "Group A" appear as they are the two highest priority keywords for that particular contact.

Note: The top most colored box represents the contact's selected Classification of either, **Client**, **Prospect**, or **Vendor**. These color codes come as a default in your system and cannot be modified.

1. If you add a classification of **Client** to the contact's profile tab, the box will appear in **blue**.
2. If you add a classification of **Prospect** to the contact's profile tab, the box will appear in **gold**.
3. If you add a classification of **Vendor** to the contact's profile tab, the box will appear in **green**.

## Contact Header Form



To color code and prioritize your keywords, go to **System Setup > List Data Maintenance > Keywords**

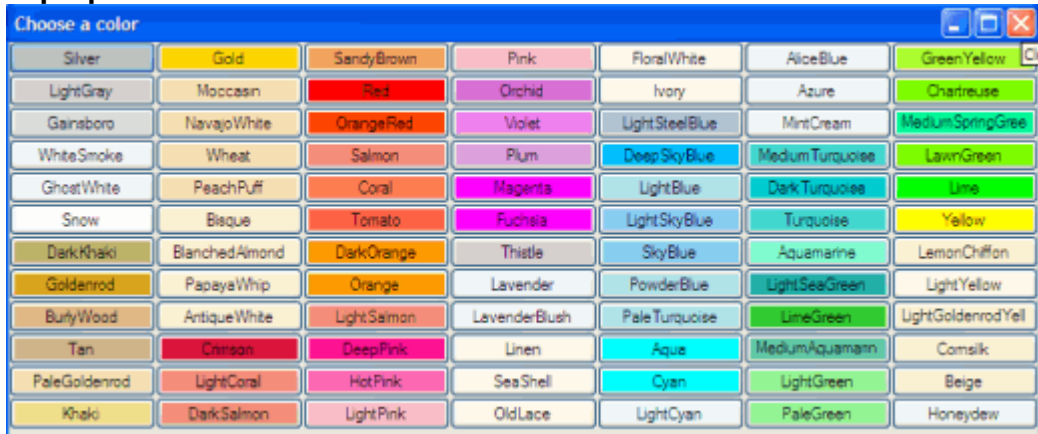
Assign priorities by selecting the corresponding box in the **Priority** column. The lower the number you choose, the higher the priority, with "0 (zero) as the *highest* priority, and "1" as the next highest priority. If two keywords have the same numerical priority, the keyword that is first alphabetically, will have a higher priority. In the example shown below, the **Account Transfer In & Group A** keywords have the highest priorities.

Assign colors by selecting the corresponding box in the **Click to Change Color** column and then choose from one of the many colors available in the pop-up color chart.

## Keywords in List Data

Keyword	Description	Priority	Click to Change Color
2009 Holiday Gift A			
Account Transfer in		2	
AddedFromSync		9999	
Annuity		9999	
Asset Management		5	
Attorney		9999	
Bill - Apr		9999	
Bill - feb		9999	
Bill - Jan		9999	
Bill - Jul		9999	
Centralink EE		9999	
Charity		9999	
Children adult		3	
Children minor		4	
Christmas07 Gift 1		9999	
Christmas07 Gift 2		9999	
Christmas2006gift		9999	
Client App - Feb 09		9999	
ClientView		2	
ClientView MiniMaster		0	
College Funding		9999	
Commission		9999	
CPA		9999	
Discretionary		9999	
Email Newsltr qtr		9999	
Estate Planning			
Financial Plan		9999	
Financial Planner		9999	
Financial Planning		6	
FP		9999	
Grandchildren adult		9999	
Grandchildren minor		9999	
Group A		1	
Group B		1	
Group C		1	
Group D		1	
Growth			

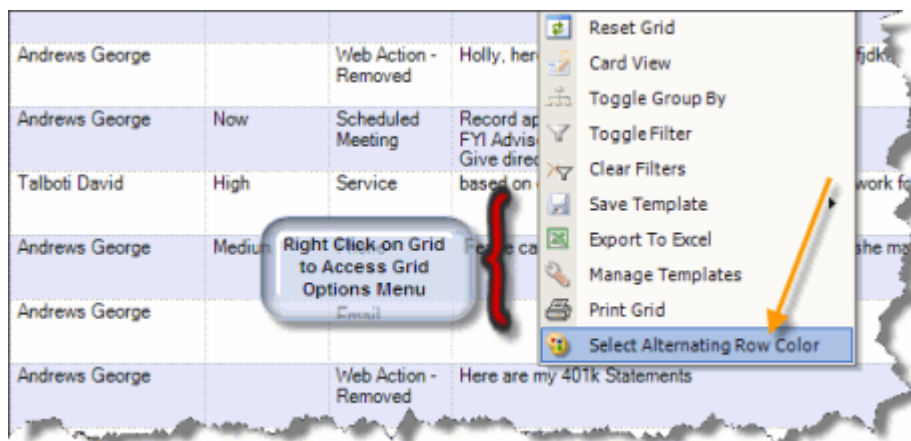
## Pop-Up Color Chart



## Grid Alternating Row Colors

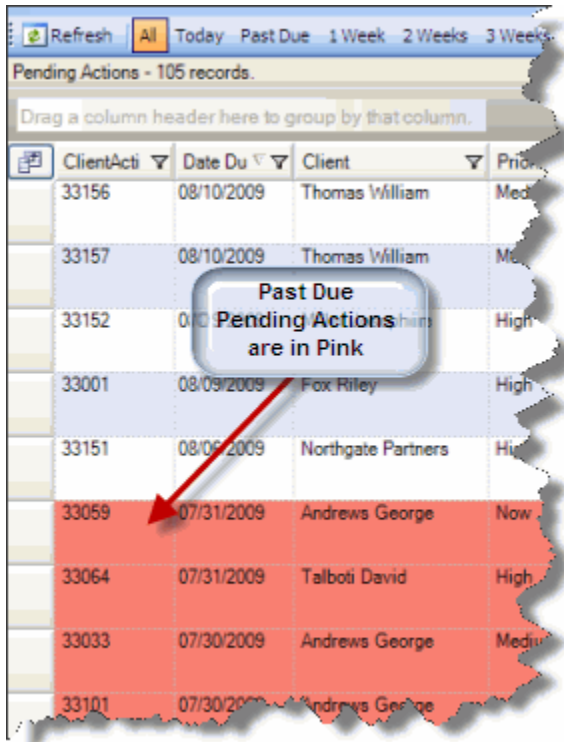
Another colorful, helpful feature is the ability to select a color for alternating rows in any Grid in Junxure. This can improve the readability of a particular grid, or even reflect your mood for a particular day.

To access this feature, go to the grid that you would like to work with; the **Pending Actions** grid is shown below as an example. Then with your mouse right-click on the gray bar, just above the grid, to bring up the **Grid Options Menu**. When you choose the **Select Alternating Row Color** from the menu, the pop-up color chart will appear (same chart as the keywords color chart) and then you can select an alternating grid color for that particular grid.



## Overdue Pending Actions

Lastly, there is a new color feature for your **Pending Actions** grid. If you would like Junxure to automatically highlight all **Past Due** actions on your Pending Actions grid, you can choose to turn on a feature that will highlight all past due pending actions in a pink shade.



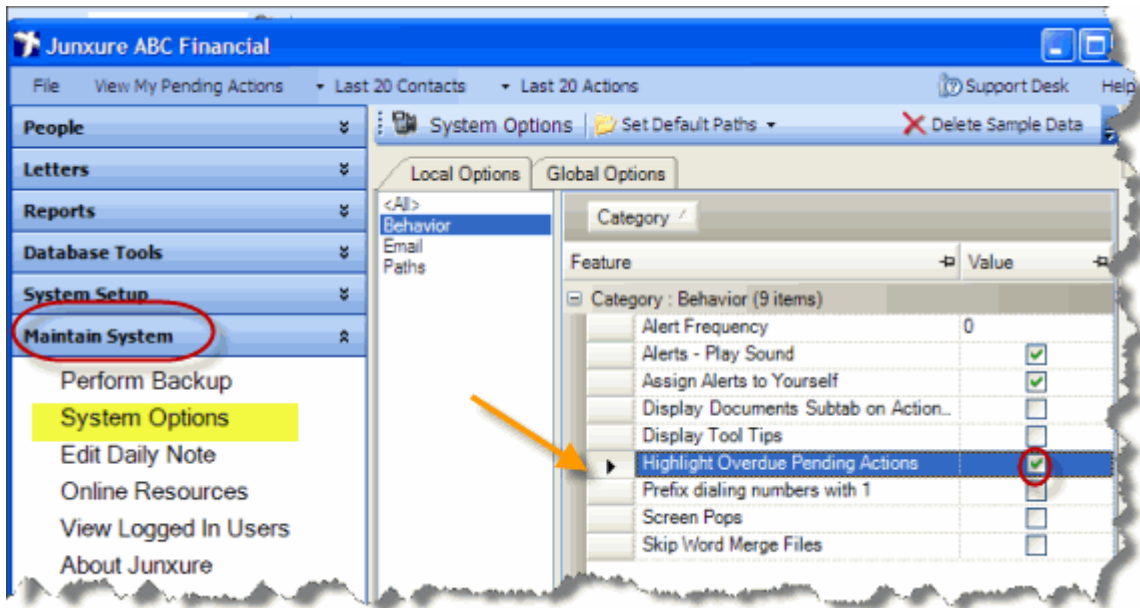
The screenshot shows a software interface for 'Pending Actions' with 105 records. The grid has columns for ClientActi, Date Du, Client, and Prior. A callout box with a red arrow points to a row where the date is 07/31/2009, which is highlighted in pink. The callout text reads: 'Past Due Pending Actions are in Pink'.

ClientActi	Date Du	Client	Prior
33156	08/10/2009	Thomas William	Med
33157	08/10/2009	Thomas William	Me
33152	08/10/2009	Thomas William	High
33001	08/09/2009	Fox Riley	High
33151	08/06/2009	Northgate Partners	Hi
33059	07/31/2009	Andrews George	Now
33064	07/31/2009	Talboti David	High
33033	07/30/2009	Andrews George	Mediu
33101	07/30/2009	Andrews George	

To turn this feature on, go to

**Maintain System > System Options > Local Options**

Then under the category of **Behavior**, check the **Highlight Overdue Pending Actions** check box. As this is a local option, selecting this feature will not affect any other users in your office.



## Bonus Tip from Our Support Team

### *How to Delete an Email from an Action*

Has an unneeded email from a client found its way into your Junxure Actions History?

Oftentimes, we have some great personal conversations with our clients via email, and that is all part of establishing trust with our clients as well as encouraging a strong, loyal, and friendly relationship. But those forwarded email chain letters, jokes or personal messages may not need to be preserved!

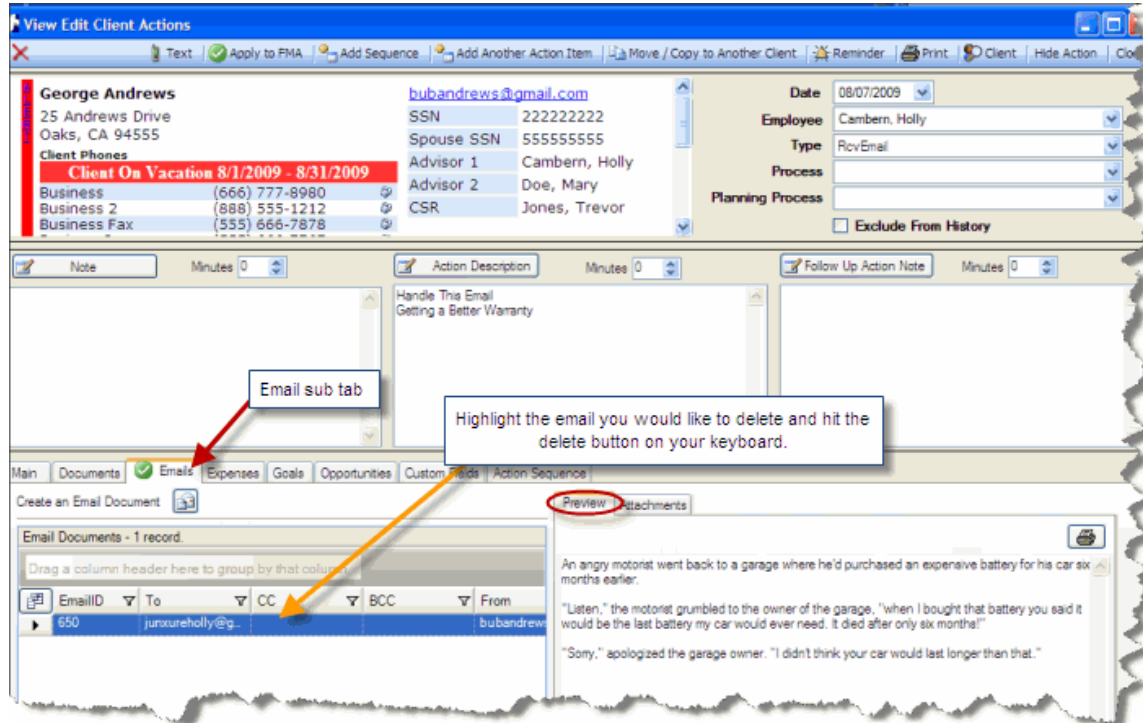
If you would like to remove captured emails in Junxure, there are two options:

- 1) Use the **Manage Email** feature to completely remove the email from Junxure.  
You access this feature from the **Outlook Add-in** tool bar in Outlook. For information on how to use this feature, please review our short video on [Manage Emails](#). This video will show you how to remove emails from an action as well as show you how to move emails to a new or existing action. You will have an option to delete the original action associated with an email.
- 2) Delete the email directly from an action.  
Select this option if you have lost the ability to manage your emails (the emails were moved, or you are not the original owner of the email) or if you want to keep a Junxure action but just want to delete the email from that action.

## Instructions on How to Delete an Email from an Action:

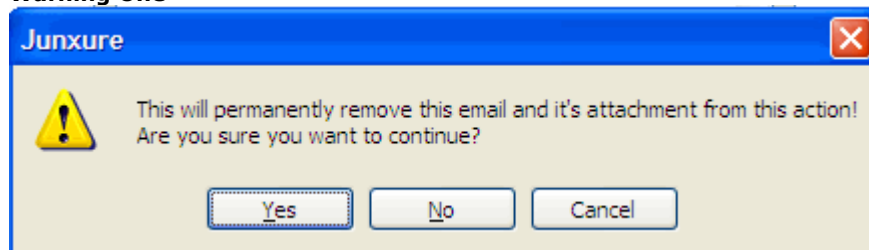
1. Open the action with the email you would like to delete.
2. Click on the **Emails** sub tab; it should have a green check box next to the word "Emails".
3. Click to highlight the email that should be deleted.
4. Select the row to be deleted and hit the **Delete** key on your keyboard.

### Action Detail Window & Email Sub Tab



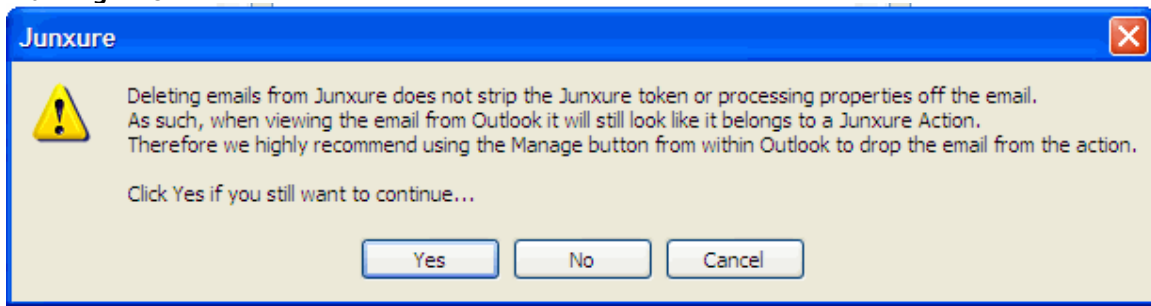
5. A warning window will appear. Click **Yes** or **No** or **Cancel**, and then another warning message will pop-up. Once again, click **Yes**, **No**, or **Cancel**.

### Warning One



6. Clicking on **Yes** in warning two will completely remove the Email from the action; however, it will not delete the action. Make sure you read this second warning carefully so that you understand the consequences of choosing to delete an email in this manner.

## Warning Two



## Back to School

### ***Our Web Based Training Classes***

#### **Junxure On Going Education**

Our On-Going Education Classes are designed for those who are already proficient with the basic features in Junxure and would like to bring their knowledge to the next level. These classes often focus on specific features in the program that are typically not covered in the Key Person or General Staff Class Series, such as "How to Handle Meetings in Junxure".

#### **General Staff Classes**

The General Staff Class Series is designed for those who will be interacting with Junxure on a daily basis in an administrative or general capacity. These classes are not only useful to a new Junxure office, but can also help to train new your office employees on Junxure's features and functionality.

#### **Key Person Classes**

The Key Person Class Series is designed for those who will be responsible for the set-up and maintenance of the Junxure system.

For a schedule of our web based training classes, please visit:

<http://junxuretraining.webex.com>