

Junxure News, Training & Tips - December 2009

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What's New at Junxure

Junxure Educational Videos

Twenty-four Junxure Educational Videos* were recently posted on our junxure.com website. These videos include updated versions of existing videos as well as new videos which feature Junxure 8 enhancements and additions. You may also notice our improved video page which includes updated categories and the addition of a category menu -- all of which make it easier to quickly find a specific educational video.

View these videos and other educational videos on our website at:
<http://www.junxure.com/videos>

*All videos require Windows Media Player.

Last Chance - ClientView Live Offer

Last Chance for Special Pricing on ClientView Live

ClientView Live is still available at the special price of \$1,995 for new purchases completed before the end of 2009. This special offer reflects a \$500 discount from the now-reduced annual ClientView Live license fee of \$2,495. ClientView Live can provide real value to both you and your clients and we encourage you to [sign up for a demo](#) to see it in action.

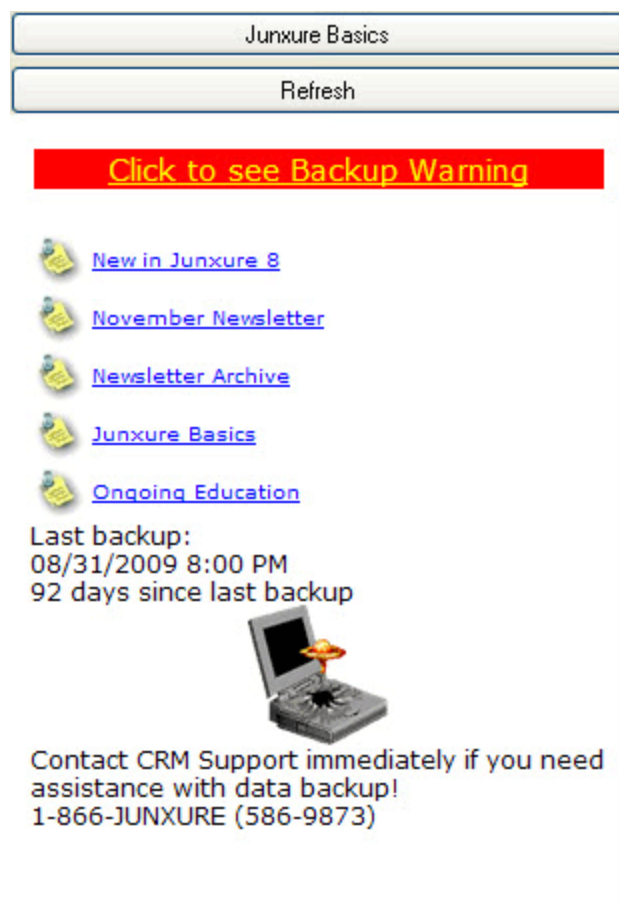
Junxure ClientView Live offers your clients a secure web portal with document vault, on-demand reports and enhanced communication channels. Additionally, ClientView Live's new Document Assembly Tool offers a simple way for you to securely process and post personalized client batched reports. There's no more need for collating, packaging and posting reports each quarter.

To sign up for a demo click [this link](#) or call 1-866-JUNXURE (586-9873). More information is also available on our [website](#).

➔ Favorite Feature of the Month

Junxure Notifications






Keep in the loop with Junxure Notifications. You can access Junxure Notifications from the bottom of the Main Menu in Junxure. Click the Refresh button to view all of the current notifications including a Junxure back-up warning (which appears if a backup has not occurred in more than 24 hours), as well as links to the current newsletter and previous newsletters. If you would like to view Junxure training information, select the link to access information about On-going Education web classes or click the button above the Refresh button to access our Junxure Basics training.




Junxure Basics

Refresh

Click to see Backup Warning

-  [New in Junxure 8](#)
-  [November Newsletter](#)
-  [Newsletter Archive](#)
-  [Junxure Basics](#)
-  [Ongoing Education](#)

Last backup:
08/31/2009 8:00 PM
92 days since last backup



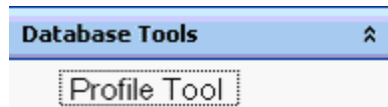
Contact CRM Support immediately if you need assistance with data backup!
1-866-JUNXURE (586-9873)

➔ Tip of the Month - Junxure Support

Profile Tool

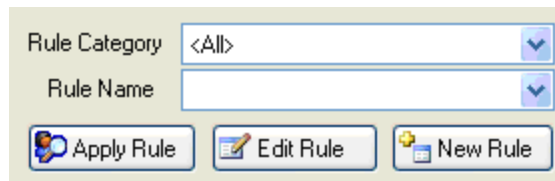
Do you need to add or remove a Classification, Keyword or Interest for a group of contacts all at once? That's the purpose of the Profile Tool! You can run the Profile Tool using Rules, (a pre-saved group of contacts) or you can choose to view all contacts in your database and manually select or de-select the appropriate contacts. By choosing all contacts, you'll have enormous flexibility in adding and removing information for only those contact records you need to change. You can also use this tool to add or remove Custodians, Adv1, Adv2, CSR, or Record Owner.

The Profile Tool is located under Main Menu > Database tools > Profile tool



As an example, let's say you have imported contact information into Junxure (using the Spreadsheet Import Tool) and you realize that you did not list the Adv1 (Advisor 1) on the spreadsheet and so a group of contact records are missing data in that important field. You can add the Advisor 1 to each of those contact records all at once by using the Profile Tool rather than going into each contact record individually to make the change.

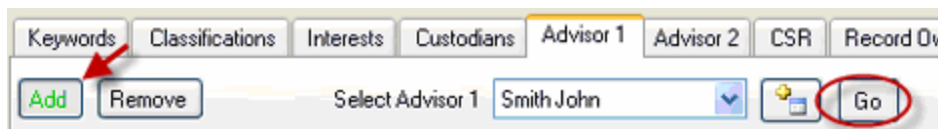
- Step 1: Choose your rule and then select Apply Rule to view everyone that you have the security rights to see in the database.



- Step 2: Select which contacts you would like to make changes to. In the example below, we did not want to make a change to the Advisor 1 for George Andrews, so the check box next to his name is deselected.


Clients Found For Rule - 20 records.						
	Select	ClientID	Client Name	Company	Employee ID	
	<input type="checkbox"/>	4	Andrews George	Andrews Tools	3	
	<input checked="" type="checkbox"/>	9	Andrews Jeff		3	
	<input checked="" type="checkbox"/>	7	Barnes Deborah...	UTA Charles Sc...	3	
	<input checked="" type="checkbox"/>	8	Barnes Richard T.	UTA Charles Sc...	3	
	<input checked="" type="checkbox"/>	13	LastName FirstN...	Company	3	
	<input checked="" type="checkbox"/>	14	LastName FirstN...	Company	3	
	<input checked="" type="checkbox"/>	3	Miller Josephine		3	
	<input checked="" type="checkbox"/>	1	Northgate Partn...		3	
	<input checked="" type="checkbox"/>	18	Office		3	

- Step 3: Next, choose Advisor 1 on the Profile Tool tab (selected tab has a yellow line as shown below) and from the drop down list, select the advisor 1 we would like to add to our selected group of contacts. If you are adding the Advisor 1 to the contacts records, choose the Add button. If you are removing the Advisor 1 from the contact records, choose the Remove button. Important: The selected button will appear in green.



- Step 4: Then select the Go button as shown circled in red above. A pop-up window will let you know that the changes were made and how many contact records were affected.

As you can imagine, if you are in the process of adding or removing items to or from a group of contacts, the Profile Tool can save a great deal of time. Be sure to look at our Profile Tool educational video at <http://www.junxure.com/videos> under the heading, "Set-Up and Maintenance".



WARNING: Make sure you always run a local back-up of your Junxure database before running the Profile Tool. Go to Main Menu > Maintain System > Perform Back-up. If you are doing an addition and a removal of an item to the same group of contacts, make sure you ADD first, before you REMOVE something from a contact record.

➔ User to User Forum Highlights

Tracking Referrals to Other Professionals

Junxure Office 1: Is there a way to track referrals that we referred out showing who we referred them to?

Junxure Office 2: I created an Action Template with a Process of "Referred to" and an Action Keyword of "Referred". Then I ran an Action Rule Report using the Action Keyword of "Referral" and it gave me the info I needed.

Sample Action Template for Referral Out

By creating an Action Template to record this type of information it ensures

consistency when entering these actions and improves the ability to report on the information entered later on.

Junxure Solutions Group Comment: By classifying actions using the Process and Action Keyword fields you have the ability to create action rules grouping like actions together and reporting on information that has been entered into these actions. This information could include notes entered into any of the three notes boxes [in this case the type of referral and professional's name they referred this contact to], who in the office made the referral, and even the date they created the action. This information can be collected and reported on by using both the Action Rules Builder and the Action Report Wizard.

For information on how to use Action Templates, Action Rules Builder or Action Report Wizard view the following resources:

- [Action Templates](#)
- [Action Rule Builder](#)
- [Action Report Wizard](#)

[Junxure Solutions Group Expert Advice](#)

End of Year Junxure Checklist

Eleven months in the making but how quickly it has approached; the time of year when we begin to tie up loose ends, de-clutter the office, thank clients for their business, and get ready to start another New Year off on the right track. As you prepare yourself, your staff, and your clients for 2010, it's important to include Junxure in that preparation list too.

Here is a checklist designed to help you focus on some areas of Junxure that you should not overlook. We suggest that you review these areas at least on an annual basis, as it will make a difference in the programs efficiency and use for years to come.

- Check for any unassigned Pending Actions that have not been completed, avoiding important tasks falling through the cracks.
 - Main Menu > Reports > Actions Dashboard
- Make sure every contact has at least one Classification. This will ensure that reports, queries and correspondence to groups of contacts are accurate.
 - Main Menu > Reports > Reports List >Data Checks
- Review your list of Classifications, Keywords, Processes, and Action Keywords for any duplicates or more than one entry that may have similar meanings or are spelled differently/misspelled.
 - Main Menu > System Set-up > List Data Maintenance > Print Cheatsheets
- Run a report that shows which contact records might be missing important information.

Main Menu > Reports > Reports List > Client Data
Summary

- Or, create your own customized report using the Report Wizard

- Search the database for actions without a Process or Action Keyword. Without these classifiers it will take longer to search through actions that had been completed in previous years.

- Main Menu > People > Print Today's Actions > Actions without Processes, Action Keywords

- Review your existing Recurring Actions to verify if they are still valid. Enter date last reviewed in each of the recurring actions.

- Main Menu > Reports > Report List > Global Recurring Actions Reports

- Run the Junxure Checkup. (available in Version 8) This will show you which of your Junxure practices are already at the "best and highest use" and also offer specific opportunities to quickly build productivity using the program.

- Main Menu > Database Tools > Data Cleanup/Correction > Junxure Checkup

- Seek out different training options to increase the staff's knowledge of Junxure features and functionality that may make the use of their time in the office more efficient.

- Attend the Free Solutions Group Virtual Open House on December 11 @ 1:00 PM Eastern Time. [Click here to register.](#)

[Junxure Training Solutions](#)

Take the Tour to Help You Decide

Don't forget to sign up for our new, free Solutions Group Virtual Open House on Friday, December 11th at 1:00 PM Eastern Time (10:00 AM Pacific Time) for a live tour of the growing set of choices for Junxure Interactive Training and Consulting. As a participant, you will also be eligible to win a free Personal Training session (valued at \$350) which will be raffled off during the session. For more information [click here](#).

[Upcoming Junxure Web Classes](#)

Junxure On-Going Education

Our web-based classes are designed for those who are either new to Junxure or

already proficient with the basic features in Junxure and would like to bring their knowledge to the next level. All web-based classes will include references to Junxure 8 enhancements and additions where they are relevant. Our web-based training curriculum is intended to supplement your overall Junxure training and is one of the many [training options](#) available to help you access the full potential of the Junxure system.

Online Classes Scheduled for the Month of December include:

- [Junxure 8 Essentials](#) - designed to introduce you to the essential enhancements and new features in Junxure version 8.
- [Key Person and General Staff Classes for the New Office](#) - two sets of classes to help your office get up to speed with Junxure basics quickly and efficiently.

Make sure you register early! These popular classes fill up quickly as space is limited.

To see the schedule of our upcoming web classes [click here](#).



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