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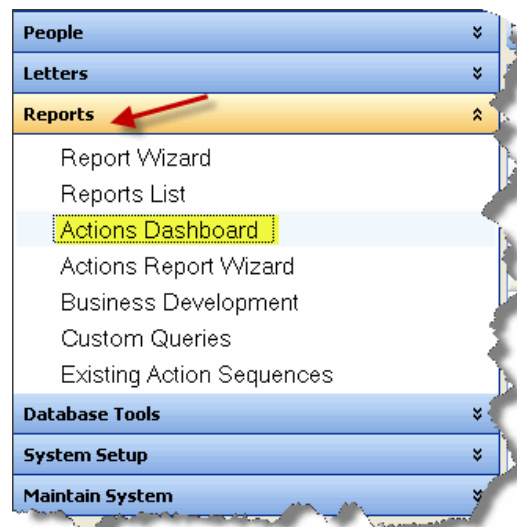
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The Actions Dashboard - Stay on Top of Pending Actions!

Ever need to see what is assigned to another employee? Need to see at a glance what is pending for a certain client? How about knowing all the actions in the system that are open for a certain process, such as trading?

Use the Actions Dashboard!!!

In Junxure go to the **Main Menu->Reports->Actions Dashboard**



Once the Dashboard opens, then you can click on any client to view the actions that are pending for that client. The grid below will populate. Once it does, you can double click on any action there to open the action and view the full notes.

You can likewise select any employee and see all the actions that are assigned to that employee as shown in the example below for "Trevor Jones". Many offices use this for when an employee is out of the office, and someone needs to cover the actions that are due that day.

Actions Dashboard

Print Grid

Clients - 24 Clients with Actions

| ID | ClientName | # Pending |
|-----|--------------------|-----------|
| 1 | Smith, Suzie | 1 |
| 2 | Smith, Sam | 12 |
| 3 | Miller, Josephine | 25 |
| 4 | Andrews, George | 40 |
| 5 | Samson, Michael | 10 |
| 6 | Walters, Fred | 2 |
| 7 | Barnes, Deborah K. | 2 |
| 9 | Andrews, Jeff | 1 |
| 219 | Jones, Mary | 1 |
| 244 | Gudy, Kelly | 7 |
| 245 | Elms, Donald | 3 |
| 246 | Hickman, John | 2 |

Employees - 8 Employees with Actions

| ActionAss | Employee | # Pending |
|-----------|----------------|-----------|
| 2 | <Client> | 3 |
| 4 | Erin Kincheloe | 4 |
| 19 | Holly Cambren | 45 |
| 17 | Jeff Jones | 17 |
| 1 | John Smith | 44 |
| 16 | Kim Owens | 3 |
| 3 | Mary Doe | 57 |
| 5 | Trevor Jones | 14 |

Processes - 30 Processes with Actions

| Process Name | # Pending |
|------------------------------------|-----------|
| <No Process Name> | 24 |
| Account Administration | 2 |
| Applications - Brokerage | 1 |
| Applications - RIA | 1 |
| Capital Needs Model | 2 |
| Client Meeting | 3 |
| Correspondence | 4 |
| Deliverable | 12 |
| Deposits/Withdrawals/Distributions | 9 |
| Estate Planning | 2 |
| Events | 1 |
| Financial Planning | 2 |
| Insurance | 1 |

Employees - Open Actions for Trevor Jones (Only viewing actions for clients that you are allowed to see) - 11 records.

| Date Due | Assigned To | Action Description |
|------------|-------------|--|
| 11/01/2008 | Jones T | Do these things to prep for mtg |
| 11/12/2008 | Jones T | Make sure client takes annual RMD by end of year if they haven't already. |
| 05/07/2008 | Jones T | review overall plan with Advisor and prepare revisions and additional an |
| 03/05/2008 | Jones T | Call client and set appt for Qtrly meeting |
| 10/12/2007 | Jones T | Call client and cfm meeting date and time. Ask about any documents p |
| 10/12/2007 | Jones T | Check agenda report to see if anything else necessary for meeting |
| 07/30/2007 | Jones T | send doc requested |
| 04/23/2007 | Jones T | build client computer files in Junxure; move existing files from "Inactive |
| 04/23/2007 | Jones T | enter all available information into Junxure -- FP Checklist; give client |
| 04/18/2007 | Jones T | please send to |

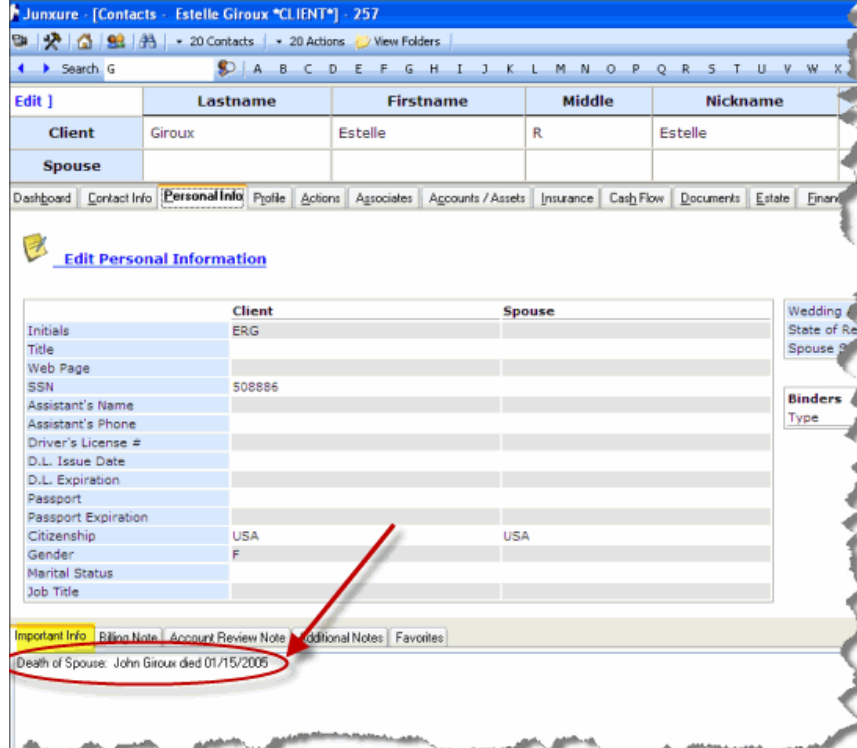
You can also view pending actions by process as shown in the area circled in orange above. For example, if you want to view all pending actions with a process of "Estate Planning", you would highlight **Estate Planning** and then those pending actions would populate in the grid below.

How to Handle a Contact Record for a Deceased Client and Surviving Spouse

Many advisors have asked the question: In Junxure, how do we best deal with a client's death when there is a surviving spouse?

Here are two methods for dealing with this:

- Remove the deceased name from the client record.
- Move the surviving spouse to the first name on the record, essentially renaming the record.
- Check the accounts tab for any accounts that had the deceased listed as the owner, and then change the ownership of the account to the surviving spouse.
- Check the Insurance tab to reflect any expired/matured insurance policies.
- Record notes about the death under the important info in the Personal Tab.



Or

- If you prefer to keep the deceased in the system as a record owner, on the profile tab, remove the Client classification and add Ex-Client instead.
- Then use the "Add New Record" button from that client's record, and choose "Copy Current Client" and enter the Spouse name.
- Using this method, on the new record, you will need to manually enter all information except for what is on the "Contact Info" tab, and you will need to be sure to move any accounts, contacts, etc. into the new record.
- Using this will also allow you to continue to report based on the deceased name.

Special Tip:

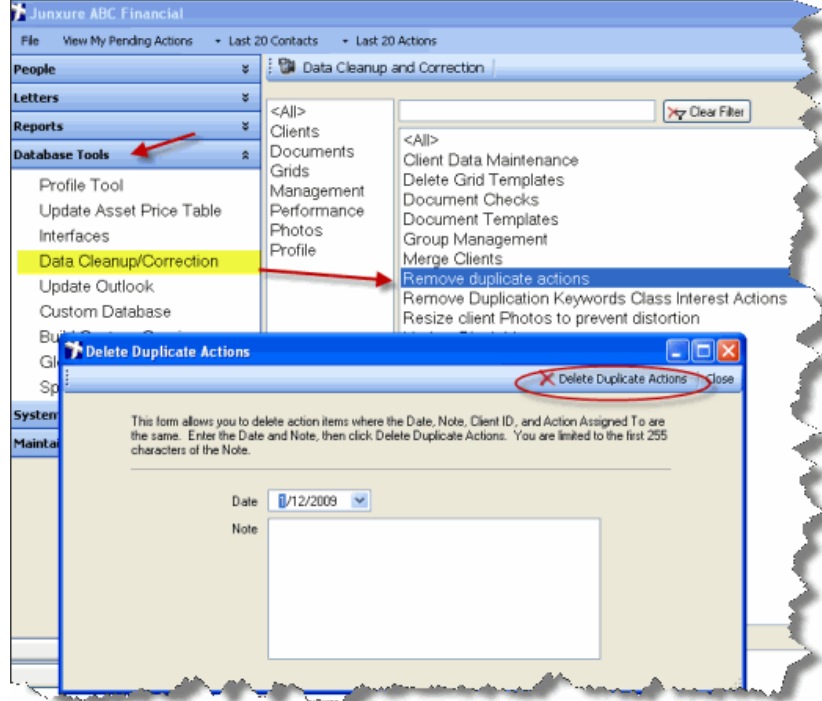
Make sure that you update fields in the "Preferred Mail Name" field and the "Dear" field on the **Contact Info** tab. This is important so that you don't inadvertently send mail with the deceased name in it.

Additionally, you will want to clean up any email addresses, phone numbers or addresses that were specifically for the deceased.

How to Delete Duplicate Actions

Occasionally, multiple instances of actions will be added to your database. To remove the extra actions from the database, that have exactly the same **Type**, **Date**, **Client**, **Assigned to**, and **Note**, use the Delete Duplicate Actions Tool. Make sure you have approved access in your office to run this tool and always run a back-up of your Junxure database first.

- **Step 1:** In the Main Menu, choose Database Tools. Select Data Cleanup/Correction. A window similar to the one below will open. Choose Delete Duplicate Actions.
- **Step 2:** The window below will open. Fill in the date the action was created, and up to the first 255 characters of the Note box (the first box on the Action Detail Screen). Click the Delete Duplicate Action button, and Junxure will report the number of instances removed.



This process is not reversible! Run a Database Back-up First, or Call Junxure Technical Support for assistance at 1-866-JUNXURE (586-9873) Option 1

FAQ:

How does the system know which actions to keep and which ones to delete?

The actions with the higher ActionID will be removed where the date, note, and assigned to fields are the same.

February 2009

Junxure Web-Based Class Schedule

| Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
|--------|--------|---------------------------------|---------------------------------|--|---|----------|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| | | Key Person 1 | Key Person 2 | Key Person 3 | | |
| 8 | 9 | 10 | 11 | 12 | 13 | 14 |
| | | Key Person 4 | Key Person 5 | Junxure 7 Essentials for the Upgraded Office | | |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| | | General Staff 1 | General Staff 2 | General Staff 3 |  Handling Meetings in Junxure* | |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| | | General Staff 4 | General Staff 5 | |  Actions Reporting in Junxure* | |

[Click here to register for all online classes](#)

*THIS CLASS IS NOT FOR THE NEW USER OF JUNXURE - IT IS AN ADVANCED TOPIC DESIGNED FOR THE USER WITH BASIC PROFICIENCY WITH THE JUNXURE PROGRAM

Upcoming Basic Training Boot Camp

Atlanta, GA / March 6, 2009

- Integrating Junxure into your Office
- Junxure Main Menu Navigation
- Junxure Key Areas
- Data Entry & Maintenance Methods
- Rules Builder
- Report Wizards
- Actions & Workflow
- Advanced Actions & Workflow
- Actions Reporting
- Document Management in Junxure
- Letters & Other Client Communication
- Email Communication
- Advanced Junxure / Outlook Integration

| City | Location | Date | Time | Click Link to Enroll |
|-------------|---------------------------------------|---------------|------------|---------------------------------|
| Atlanta, GA | Marriot Airport Hotel | March 6, 2009 | 9am to 4pm | Basic Boot Camp |

For more information about our Boot Camps, please visit:
http://www.junxure.com/main/training_bootcamp.asp

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