Junxure
Total Firm Technology

News, Training, and Junxure Tips - May /June 2009

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What is one simple thing you can do today to harness more power of Junxure tomorrow?

Answer: Fill out the "action classifier" fields consistently and accurately: Action Type, Process, & Action Keyword.

Why? Today's completed action is tomorrow's living history for each client. As your relationship grows, so will the history, and browsing for those past details won't be as easy. Junxure is built to assist you! By noting the key "action classifiers" each time you add a new action, you make it possible for Junxure to immediately search, report on or drill down into this critical history for you whenever necessary.

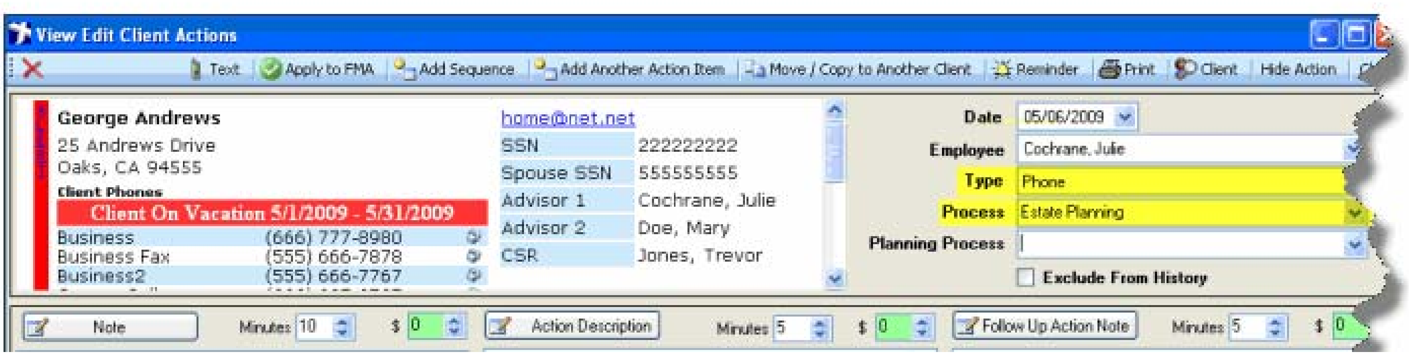
Action Classifiers

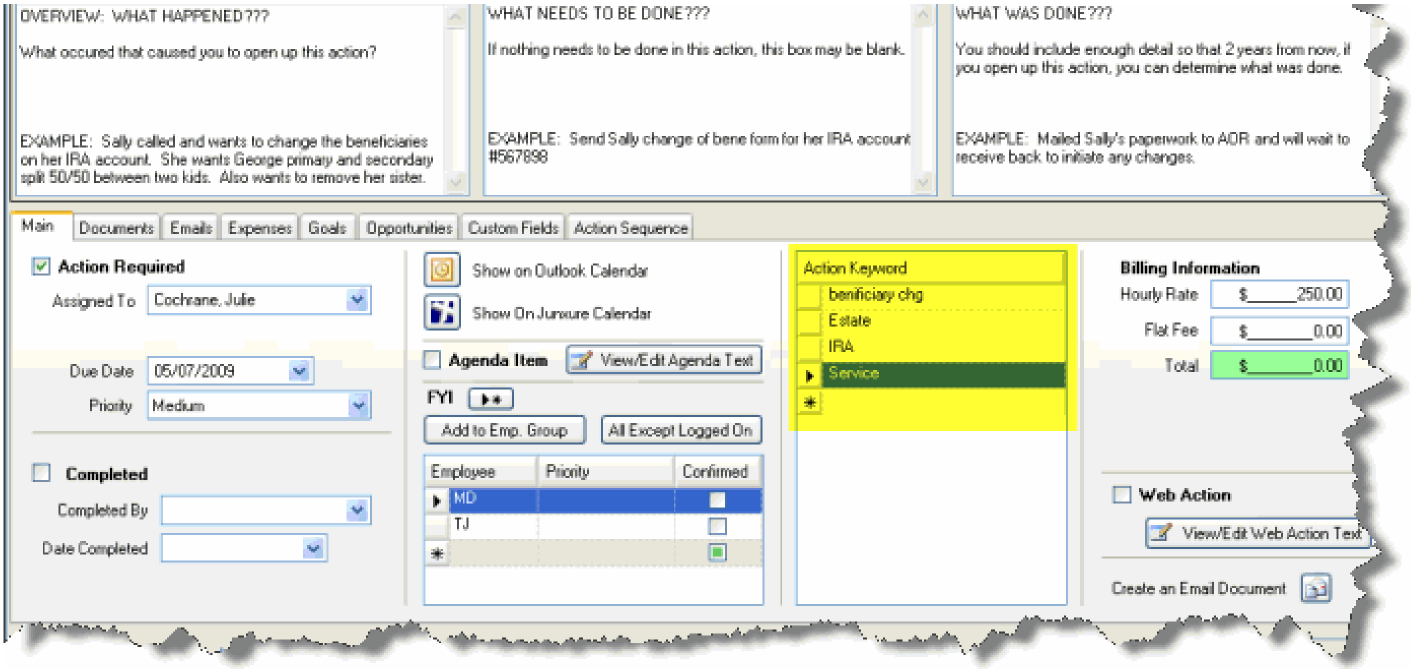
Action Type

Type is the broadest way for you to identify the kind of action. What happened to initiate the action? Was it a phone call, a letter sent, an email received, a meeting held, a note recorded, etc.?

Process

Process is a way for for you to identify what an action is about by using a topic or category. Think about the different services you provide, or areas of your business. Examples include: estate planning, insurance, financial planning, portfolio analysis, trading, seminars, administrative, education, paperwork, meeting prep, etc.





Action Keywords

Action Keywords allow you to enter additional details regarding the action, beyond a general category or topic. With type and process you can only choose one per action. With action keywords you can choose as many as you'd like to classify and note details as they pertain to an action.

How to Determine your List of Classifiers

Type, Process, and Action Keywords give you the ability to sort and filter through all actions pertaining to a specific topic or detail in order to quickly pull together actions instead of having to scroll through a long list of historical actions. This search functionality is available both in an individual contact record and also globally across the database using the Actions Rules Builder.

To help your firm determine what you should include in these customizable drop down lists, and to make actions easier to find in the future, use these following questions to help guide you through the decision making process.

1. "What information do I want to know from Junxure?"
2. "What information do I need to look up in a quick pinch when a client calls in looking for information about a task we've done for them?" (trades, address changes, beneficiary changes, account applications, letters, etc.)
3. "What events, revolving around my clients, do I want to make sure will not fall through the cracks, and what events do I need to be proactive about in order to avoid future issues? (Prepare cost basis reports for certain clients and mail them early enough to avoid last minute calls.)
4. "In what way do I want to view or use this information?" (Run a report, review notes before meetings, etc.)

Once you sit down, ask yourself these questions, brainstorm with your staff, and write down everything, you will then be able to have a clearer idea of how to develop your list of action types, processes, & action keywords and determine what actions fall under each classifier. You might want to do some tests to verify that the classifiers (action type, process, action keywords) give you what you need.

If you need further assistance, then you may consider our Practice Management Consulting services which provide you with Junxure's PowerTools, which are pre-built areas of the program. For more information see: http://www.junxure.com/main/consulting/index.asp

Tools to Harness the Power

What if everybody doesn't remember to fill in these areas of the action detail window before closing out of an action?

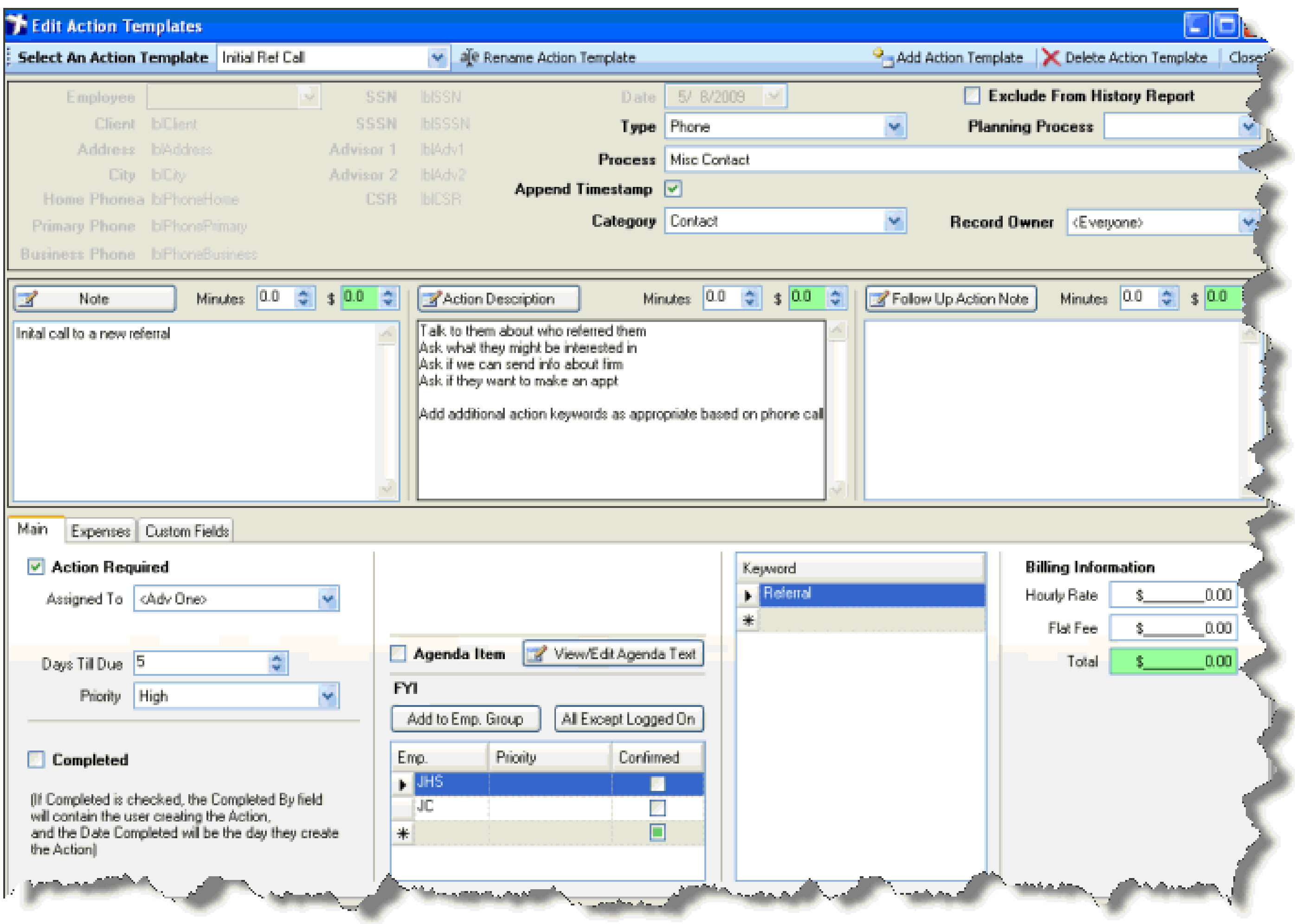
Junxure provides features to make this an unfailing process.

Highlighted below are two tools that will assist you in making sure that action classifiers are filled out consistently, and properly.

Action Templates

First, use Action Templates to help ensure these fields are filled out consistently and properly for different types of actions your office may create on a regular basis.

Action templates allow you to create a (standardized) template for different actions which automatically fills out information within the action detail window when the action is initiated. This could include information such as Note, Action Description, the Assigned To field, as well as Type, Process, and Action Keywords. Here is a sample Action Template that could be used when creating an action for a call made to someone who was referred to your office.



Having this information pre-filled certainly doesn't prevent anyone from adding additional information into the action detail window. However you will know that at a minimum this information will be recorded and not forgotten, along with the Action Type, Process, and Action Keyword being entered.

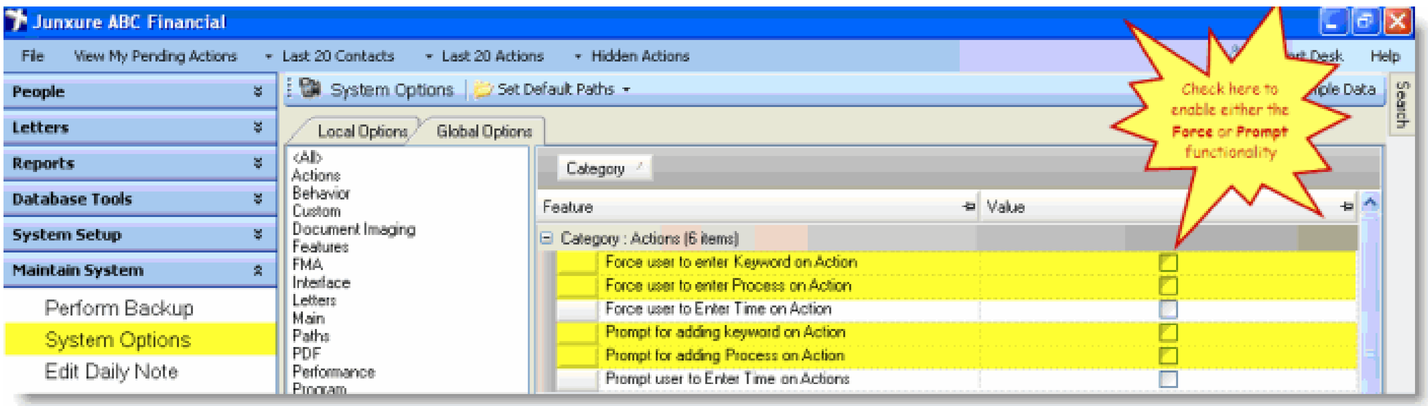
- Action Templates Video
- Action Templates Online Documentation

Force or Prompt Users to Complete Fields

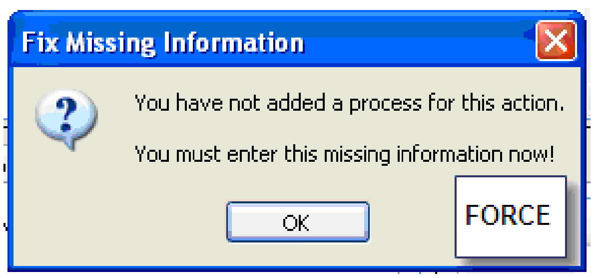
Second, there is global setting available that will either "force" or "prompt" users to enter in a Process or Action Keyword before closing out of an action.

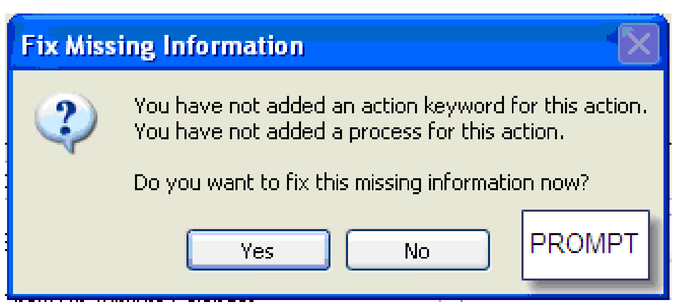
As mentioned, entering Action Type, Process, and Action Keywords into an action can be very valuable, but even adopting this as a "best practice", people can sometimes forget to classify actions using these fields. To help ensure all employees are entering this valuable information, Junxure does provide a setting enabling firms to either prompt, or force, staff members to complete these fields before exiting an action. This feature can also be used as a temporary reminder measure to help staff get used to filling out the action classifier fields.

To turn these features on or off, go to **Main Menu->System Options.** You will find the "Force or Prompt User" feature listed under the category of "Actions" as shown below.



When someone is either forced or prompted to complete the noted fields, they will receive one of the following pop-up boxes.





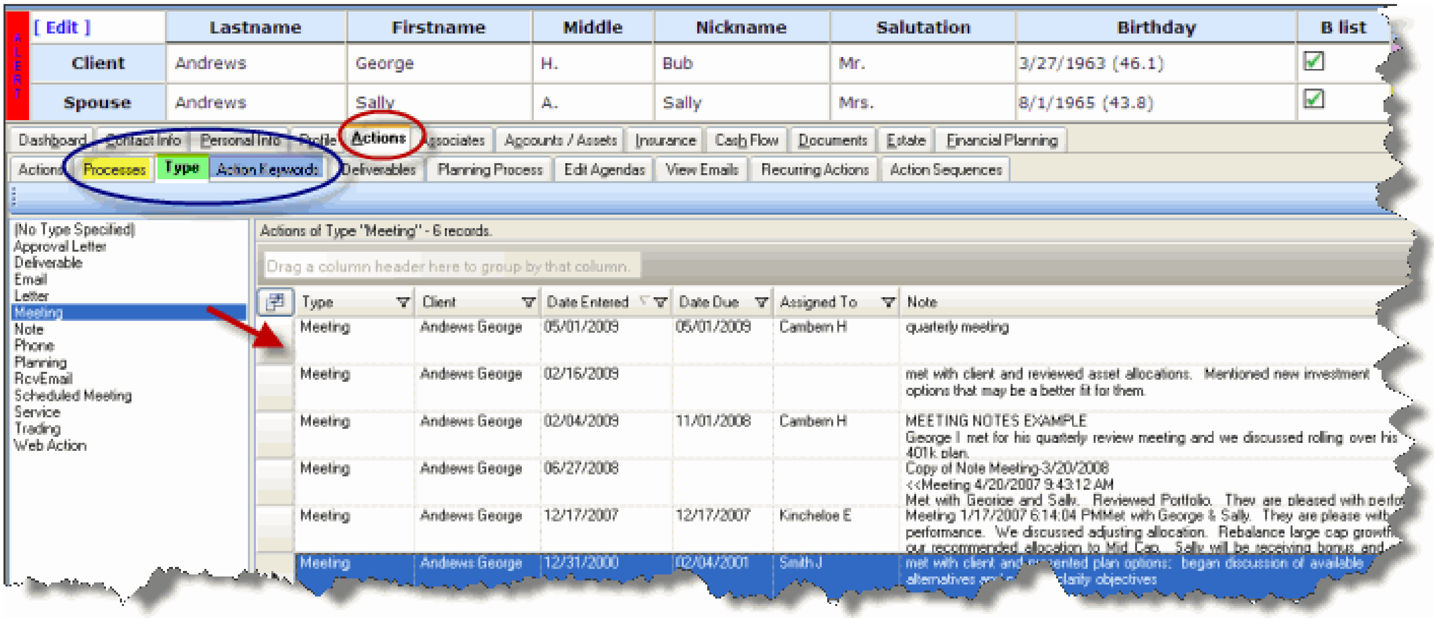
Searching for Actions

Now that we have learned about some tools to help make sure that action classifiers are consistently filled, lets review one of the ways that you can quickly find actions by using the Actions Sub Tabs by "Process", "Action Type", and "Action Keyword" as shown circled in blue below.

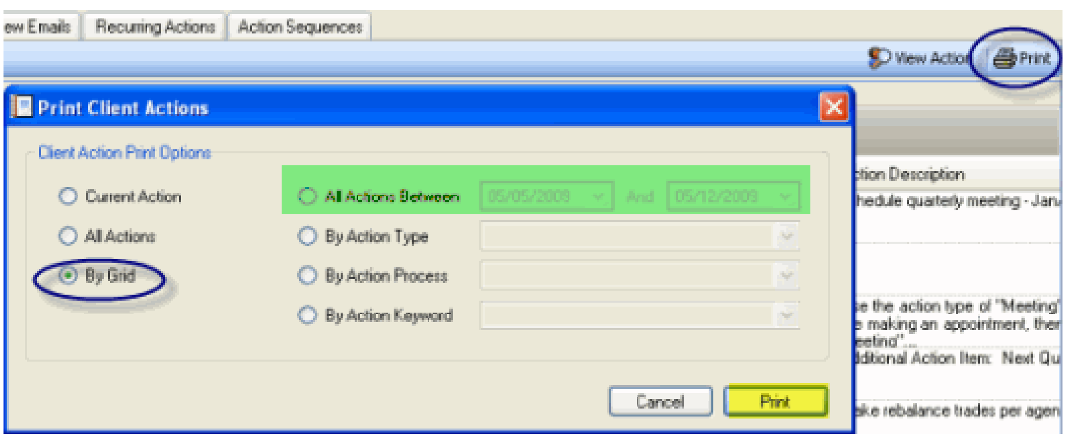
Type", and "Action Keyword" as shown circled in blue below.

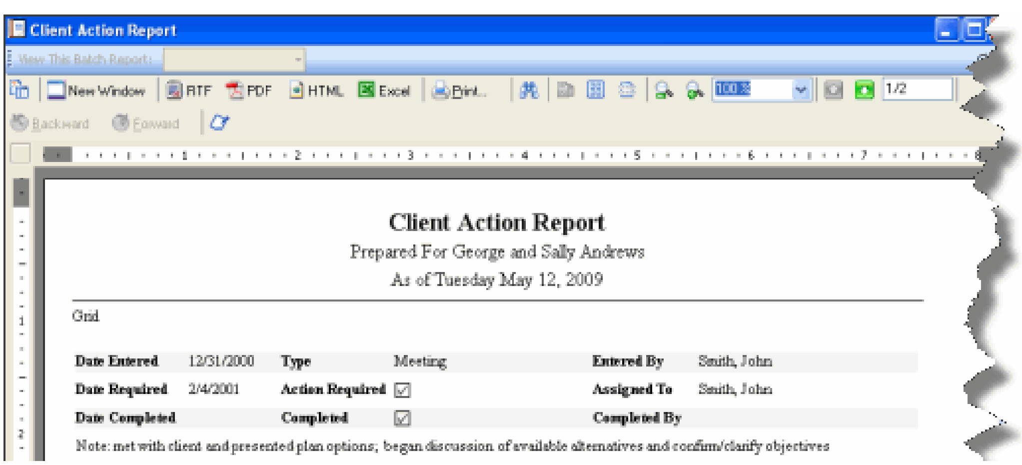
Let's say for example, that you would like to print out a list of meeting notes. If you reserve the action type of "meeting" to use anytime you record meeting notes, then you can quickly search for all meeting notes by selecting the Actions Sub tab of "Type", then select the type of "Meeting".

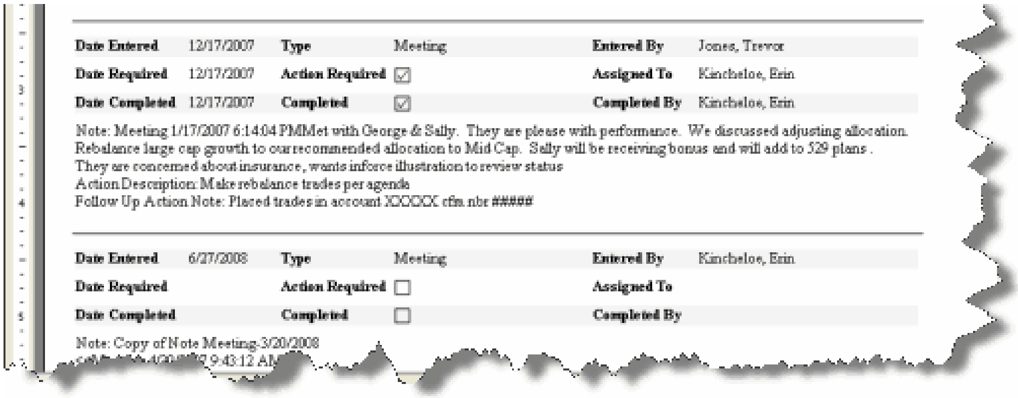
You will now see all actions with an action type of "meeting" in the grid to the right, making it much easier than scrolling through a long historical list of actions on the Actions sub tab.



Next select the "Print" icon, then select the "Print Grid" print option, then select the print button as highlighted in yellow below. This will print out all of your meeting notes for the selected contact as shown in the report below. If you would like to see the meeting notes within a specific date range, then select the "All Actions Between" and record your date range as highlighted in green below.







Date Entered	12/17/2007	Type	Meeting	Entered By	Jones, Trevor
Date Required	12/17/2007	Action Required	☑	Assigned To	Kincheloe, Erin
Date Completed	12/17/2007	Completed	☑	Completed By	Kincheloe, Erin

Note: Meeting 1/17/2007 6:14:04 PMMet with George & Sally. They are please with performance. We discussed adjusting allocation. Rebalance large cap growth to our recommended allocation to Mid Cap. Sally will be receiving bonus and will add to 529 plans.
They are concerned about insurance, wants inforce illustration to review status
Action Description: Make rebalance trades per agenda
Follow Up Action Note: Placed trades in account XXXXX cfm nbr #####

Date Entered	6/27/2008	Type	Meeting	Entered By	Kincheloe, Erin
Date Required		Action Required	☐	Assigned To	
Date Completed		Completed	☐	Completed By	

Note: Copy of Note Meeting 3/20/2008

Wanted: ByAllAccounts Users

Help us test a new Junxure interface!

The Junxure Development team is working with ByAllAccounts to build a new Junxure interface. If you are a user of ByAllAccounts and would like to help us test and complete the interface for Junxure, please let us know with an email message to admin@junxure.com. Thank you!

Upcoming Junxure Web-Based Classes

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
May 24	May 25	May 26	May 27	May 28	May 29	May 30
					ON-GOING EDUCATION: Tracking Prospects and New Business in Junxure	
May 31	June 1	June 2	June 3	June 4	June 5	June 6
		Key Person 1	Key Person 2	Key Person 3		
June 7	June 8	June 9	June 10	June 11	June 12	June 13
		Key Person 4	ON-GOING EDUCATION: Successful Seminar and Event Planning	Key Person 5		
June 14	June 15	June 16	June 17	June 18	June 19	June 20
		General Staff 1	General Staff 2	General Staff 3		ON-GOING EDUCATION: Accounts Assets Tab

June 21	June 22	June 23	June 24	June 25	June 26	June 27
	General Staff 4	General Staff 5				
June 28	June 29	June 30				

Version 7.0

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Click to View Class Schedule or Register

*ON-GOING 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
