Junxure
Total Firm Technology
News, Training, and Junxure Tips - **March 2009**

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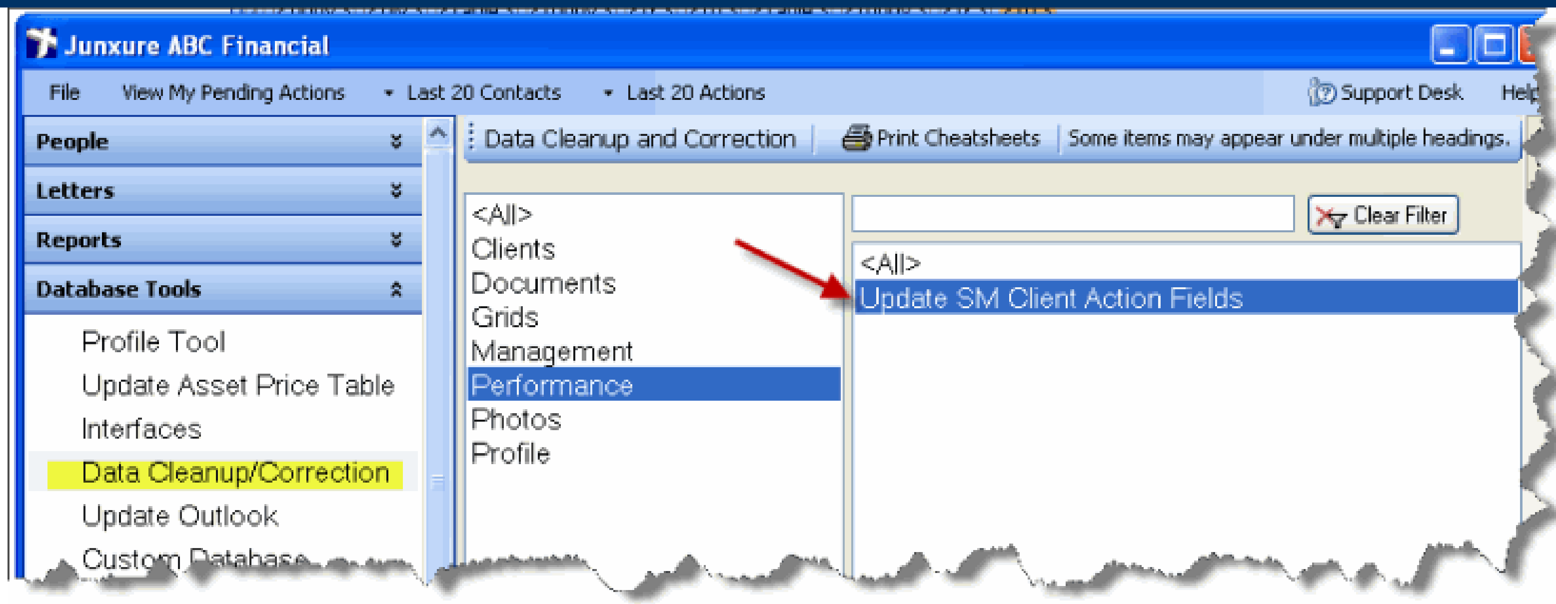
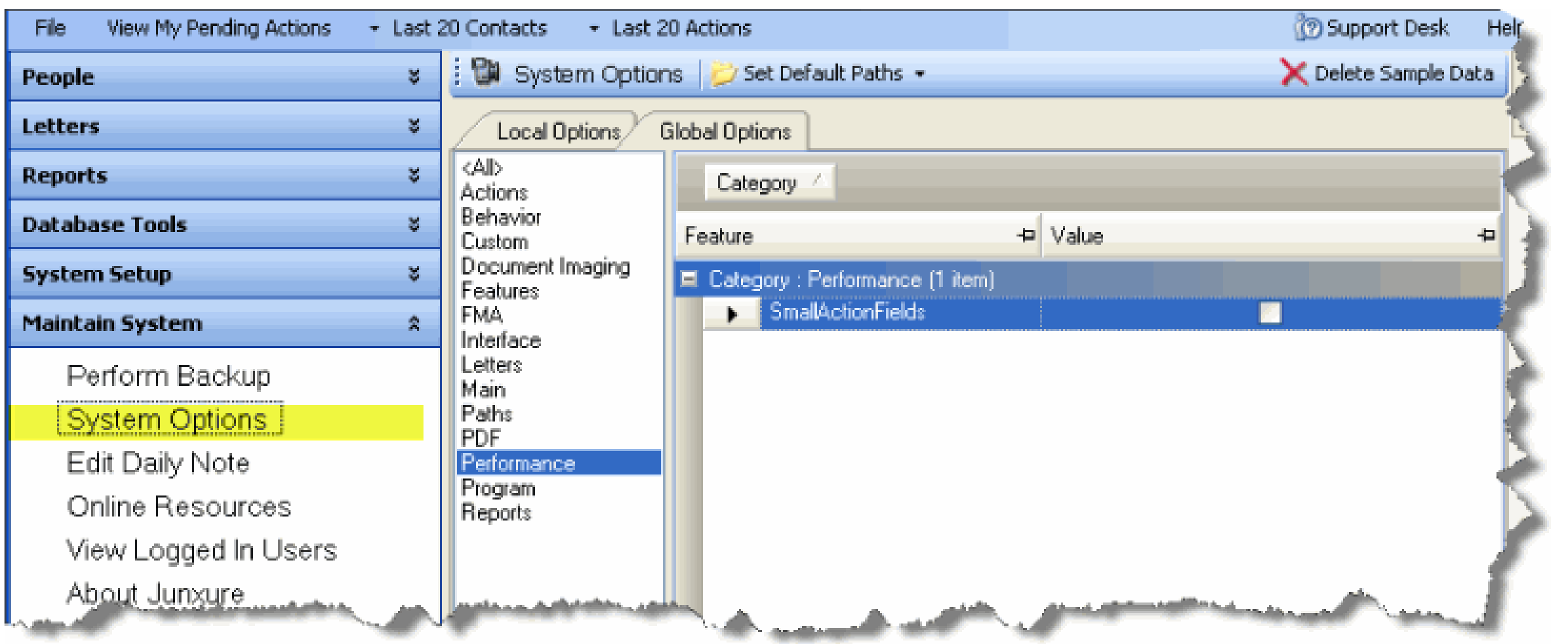
Optimize Your Actions

To improve performance on the Actions Tab, Junxure has built in an option called **Small Action Fields**. This option will truncate the view of the text in the Note, Action Description, and Follow Up Action Note fields to only the first 500 characters when viewed from the actions screen. This will not delete any data, you just will not be able to view the full text until you open up the individual action.

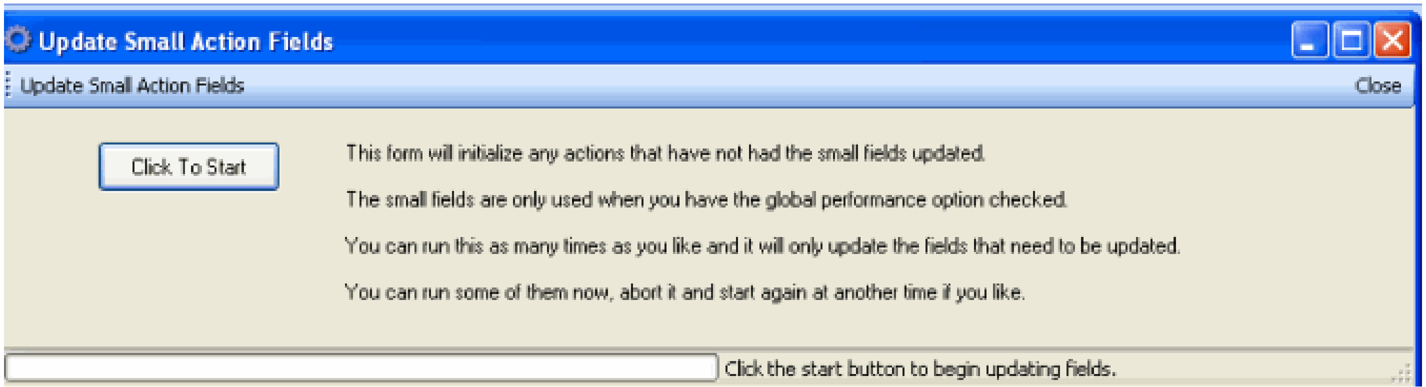
To enable the option, go to **Maintain System > System Options** > Performance and checkmark the **SmallActionFields** box. See the **Very Important Note** below for an additional step to complete this choice.



Very Important!!!! After you enable this option, you must use a tool to update the existing actions in Junxure. Failing to do so will make the actions grids in the program blank. To update the actions, go to Database Tools > Data Cleanup and Correction > Performance > Update SM Client Action Fields. From this point forward, all newly-created actions will be viewable in an abbreviated format.



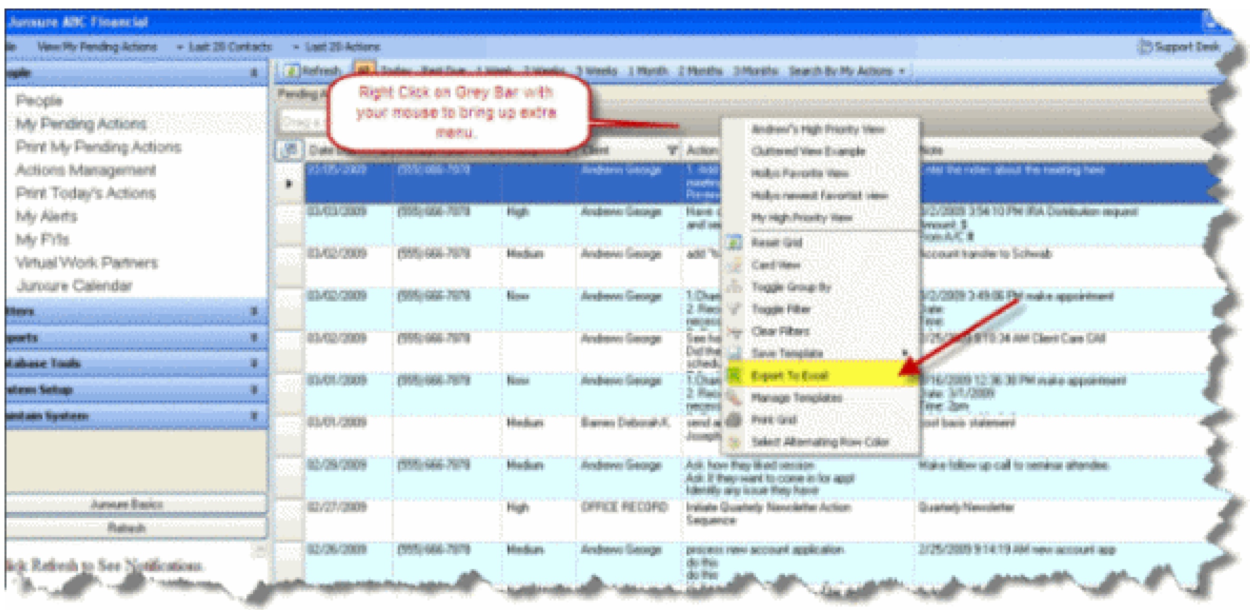
Double click to open and you will see the tool to update the existing actions. This simple tool will update the small action fields. For office's that are long time users, you may have many actions, and the tool make take a while to run. You can abort the tool anytime you want, and when you start it again, the actions that have already been updated will not need to be done again.

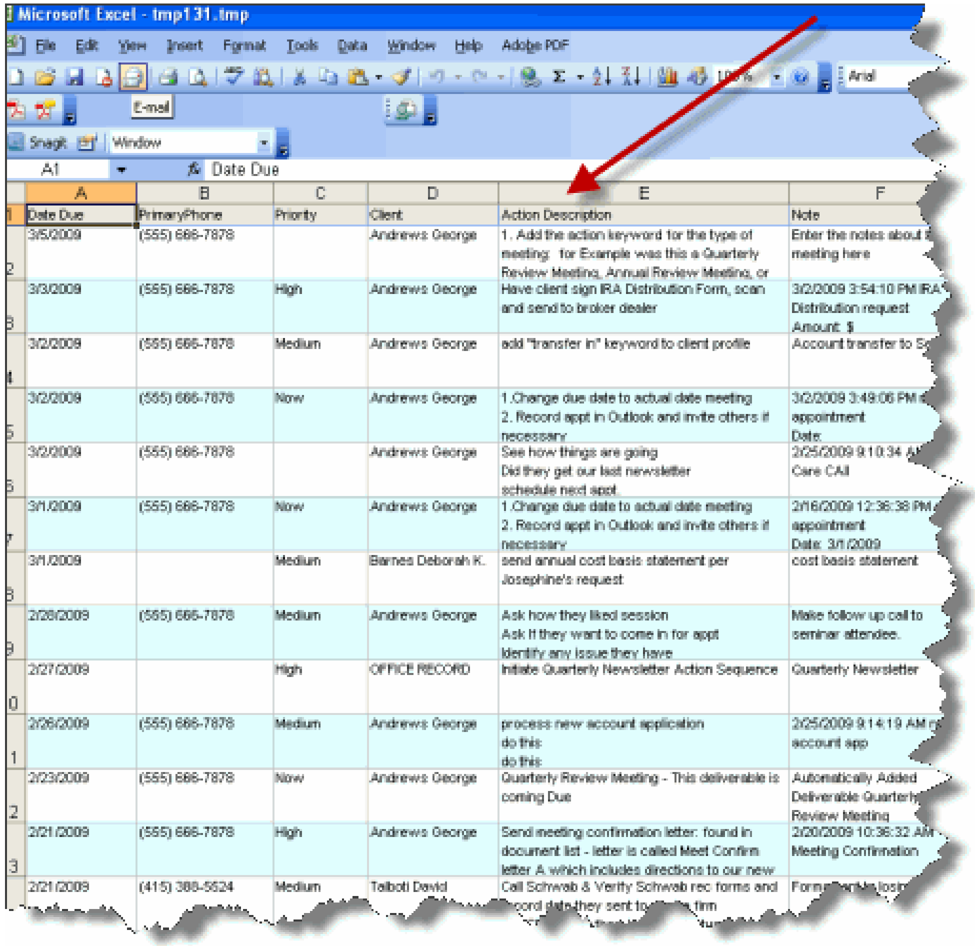


Export your Grids to Excel

Did you Know?- In any grid in Junxure you have the ability to export your grid data into Excel.

- To Export your Grid Data: In any grid, right click on the grey bar (above the grid) with your mouse. The Junxure Grid Menu will appear. Then select the Export to Excel option.





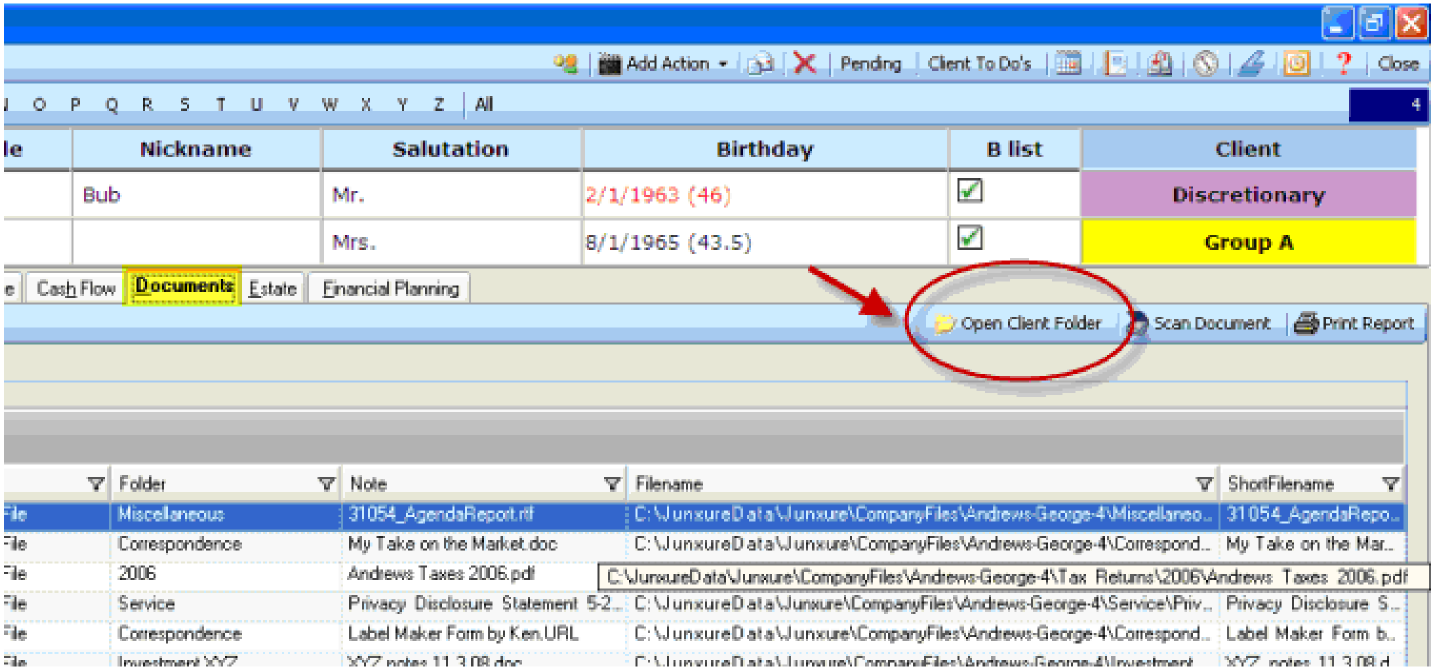
Date Due	PrimaryPhone	Priority	Client	Action Description	Note
3/5/2009	(555) 666-7878		Andrews George	1. Add the action keyword for the type of meeting: for Example was this a Quarterly Review Meeting, Annual Review Meeting, or	Enter the notes about t meeting here
3/3/2009	(555) 666-7878	High	Andrews George	Have client sign IRA Distribution Form, scan and send to broker dealer	3/2/2009 3:54:10 PM IRA Distribution request Amount: $
3/2/2009	(555) 666-7878	Medium	Andrews George	add "transfer in" keyword to client profile	Account transfer to S
3/2/2009	(555) 666-7878	Now	Andrews George	1.Change due date to actual date meeting 2. Record appt in Outlook and invite others if necessary	3/2/2009 3:49:06 PM appointment Date:
3/2/2009	(555) 666-7878		Andrews George	See how things are going Did they get our last newsletter schedule next appt	2/25/2009 9:10:34 A Care CAll
3/1/2009	(555) 666-7878	Now	Andrews George	1.Change due date to actual date meeting 2. Record appt in Outlook and invite others if necessary	2/16/2009 12:36:38 PM appointment Date: 3/1/2009
3/1/2009		Medium	Barnes Deborah K.	send annual cost basis statement per Josephine's request	cost basis statement
2/28/2009	(555) 666-7878	Medium	Andrews George	Ask how they liked session Ask if they want to come in for appt Identify any issue they have	Make follow up call to seminar attendee.
2/27/2009		High	OFFICE RECORD	Initiate Quarterly Newsletter Action Sequence	Quarterly Newsletter
2/26/2009	(555) 666-7878	Medium	Andrews George	process new account application do this do this	2/25/2009 9:14:19 AM account app
2/23/2009	(555) 666-7878	Now	Andrews George	Quarterly Review Meeting - This deliverable is coming Due	Automatically Added Deliverable Quarterly Review Meeting
2/21/2009	(555) 666-7878	High	Andrews George	Send meeting confirmation letter: found in document list - letter is called Meet Confirm letter A which includes directions to our new	2/20/2009 10:36:32 AM Meeting Confirmation
2/21/2009	(415) 388-5524	Medium	Talbott David	Call Schwab & Verity Schwab rec forms and record date they sent to firm	Form

Manually Add Documents into Junxure

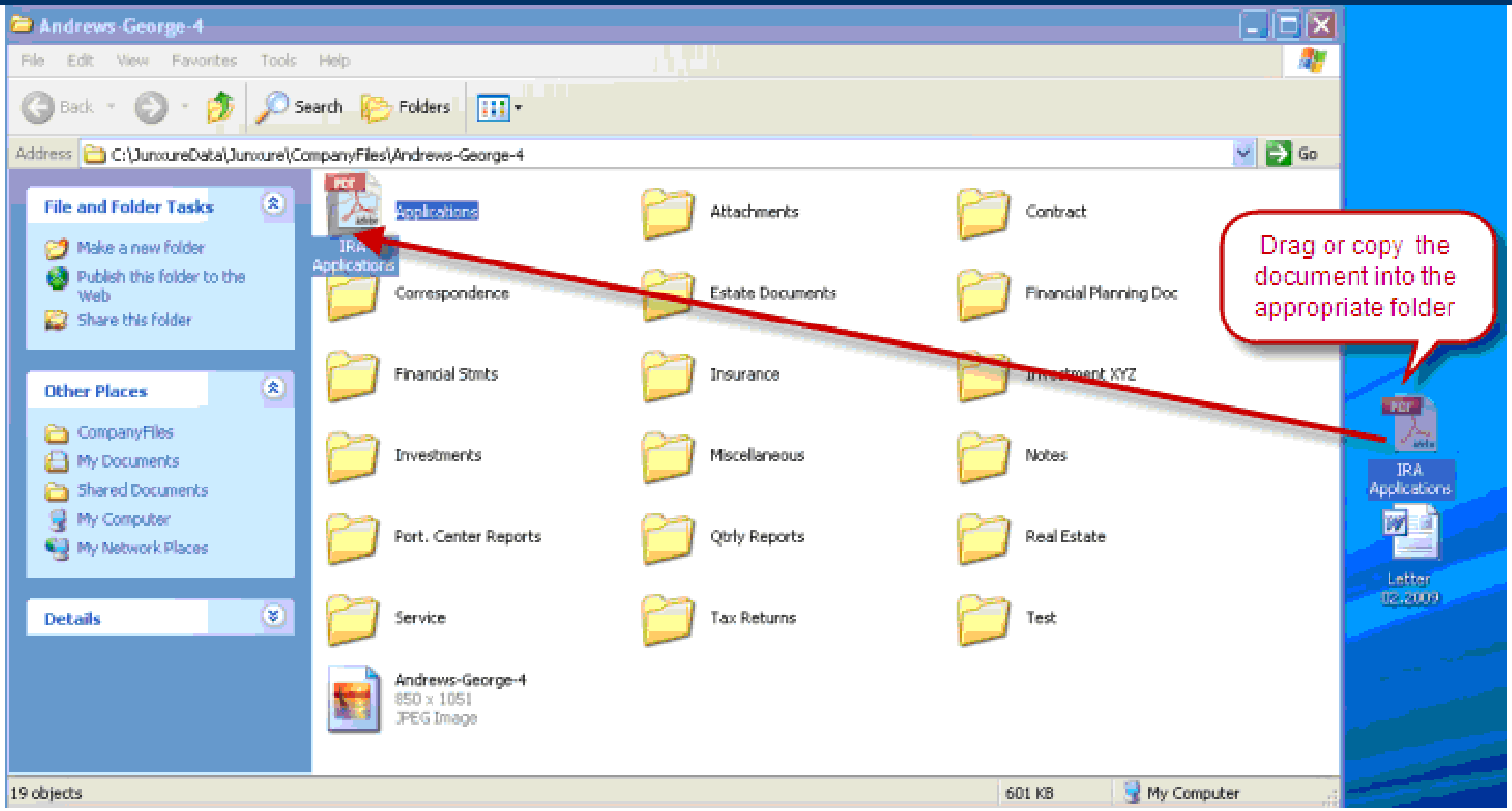
Perhaps you have documents that you created outside of Junxure and you may be wondering if you can bring those documents into Junxure and associate them with a specific contact? The answer is yes, Junxure gives you the ability to manually bring those documents in.

- **Step 1** - Locate the document(s) that you want to work with. They might be stored on your desktop or somewhere on your server.
- **Step 2** - Go to the contact record where you want to move documents to, then select the Documents tab as shown highlighted in yellow

- **Step 3** - Select the file folder icon Open Client Folder as shown circled in red. This will bring up the folders for that contact. Note: For information on how to customize and build these file folders, select this link: [Build File Folders Online Documentation]

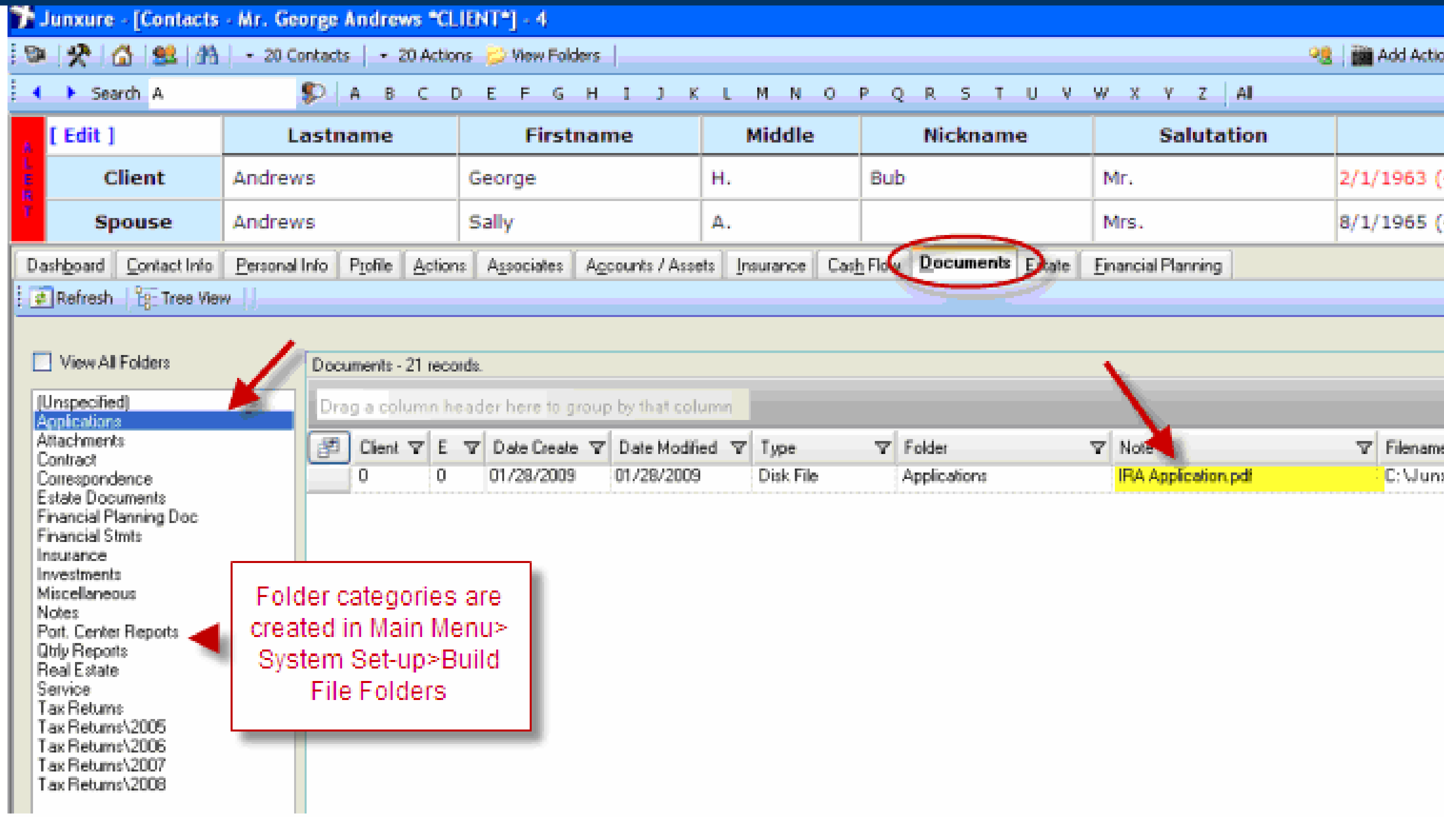


- **Step 4**- Minimize all junxure windows, except for the "client folders" window, so that you can still have easy access to the documents that you want to bring into Junxure. Notice that the file location name shows you which contact folder you are working with as you can see the client name and Junxure ID at the end of the file location name, in this case it is "Andrews-George-4"



- **Step 5** - Then, simply drag (or copy) the document(s) into the appropriate folder category. In the example above, I dragged George Andrew's IRA application (in a PDF format) into the appropriate folder called "Applications". Junxure allows you to manually bring in many different types of documents such as PDFs, Excel spreadsheets, Word documents, or even PowerPoints.

Go back to the client's documents tab (in this case it was George Andrews), then from the left hand menu, select the category you placed the document in (in this example, it was the Applications folder). After you select the Refresh button you will then be able to view the document that you just manually brought in.



New Advanced Online Class Just Added

New **Friday - April 17th, 2009**

Successful Seminar & Event Planning Using Junxure

Hosting seminars and events are a highly effective way for financial professionals to market their services. They are a valuable tool that can introduce you to new clients, enhance your presence in the community, and enhance your stature with existing clients. However, successful seminars/events require an orchestration of some basic fundamentals and careful attention to detail as preparation and follow-up are the keys to a successful seminar/event

Junxure allows you the opportunity to develop automated procedures revolving around seminar/event setup and follow-up as well as create a list of invitees, create and send invitations, and track RSVPs. In this class you will learn how Junxure can assist you in growing and maintaining your business by helping you to automate procedures and tasks associated with hosting seminars and events.

Along with Seminar "How To's" this Successful Seminar and Event Planning class will cover the following topics: Using Action Sequences* for set-up and follow-up Using Keywords, Interests and customized User Fields* Creating Invitations* and mailing lists Recording/Adding the same Action to a group of contacts

*examples are available to attendees after training

IMPORTANT - 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

Pricing: $150 per class or $625 for all 5 Advanced Classes

Version 7.0 Junxure

Click to View Class Schedule or Register

Upcoming Junxure Web-Based Classes

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
March 8	**March 9**	**March 10**	**March 11**	**March 12**	**March 13**	**March 14**
		Key Person 3	Key Person 4	Key Person 5	New ADVANCED: Tracking Prospects & New Business in Junxure*	
March 15	**March 16**	**March 17**	**March 18**	**March 19**	**March 20**	**March 21**
		Gen Staff 1	LAST CHANCE! Junxure 7 Essentials for the Upgraded Office	Gen Staff 2	New ADVANCED: Accounts / Assets Tab in Junxure*	
March 22	**March 23**	**March 24**	**March 25**	**March 26**	**March 27**	**March 28**

		Gen Staff 3	Gen Staff 4	Gen Staff 5		
March 29	**March 30**	**March 31**	**April 1**	**April 2**	**April 3**	**April 4**
		General Staff 4	General Staff 5			
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 ADVANCED: Successful Seminar & Event Planning Using Junxure*	

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