Junxure Newsletter

Junxure News, Training & Tips - November 2009

In This Issue:

What's New at Junxure

What's the Best Fit?

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.

Hear experiences from a panel of current Junxure users who have engaged the Solutions Group to help their firm utilize Junxure to its fullest potential. Besides your employees, we all know that training is one of the most important investments you can make and choosing the right approach is just as important.

Learn how to match your needs and learning style to the many different training modes available to gain the most benefit from your choices. This interactive web-based event will also include information from our panel of training and consulting experts and we expect a lively discussion of training options to bring your knowledge of Junxure to the next level.

Bring along your questions for the Q&A part of the session – other Junxure users will also be interested in the answers.

During this Virtual Open House you will have the opportunity to hear about the learning experience for each of the options below. You can consider first-hand which interactive style meets the needs of your firm and your staff.

- Web-based Instructor-led training

- Personal training
- On-site training
- Practice Management 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.

To register for this free event, **click here**.

If you are unable to join us, feel free to peruse the training information on our website at: **http://www.junxure.com/main/training.asp** or if you have questions contact the Solutions Group via email at **training@junxure.com** or via phone at 1-866-586-9873, Option 5.

Favorite Feature of the Month

Email Templates

Email Templates, our favorite feature for this month, is one of many time-saving features built into Junxure.

An email template is a helpful timesaver for those emails that you send out regularly – examples might include a message to a client to follow up on paperwork sent, to confirm their upcoming appointment at the office, or a seminar reminder. You can also personalize your emails by adding Junxure merge fields into your email templates which will auto-fill basic client data (first name, last name, client address, etc.) just like a Microsoft Word Merge document.

This feature is similar to document templates for your letters, however, with emails you are not required to use a template to send out an email through Junxure.

To learn how to create and save Email Templates **click here**.

You may also view our video on Email Templates by **clicking here**.

Junxure Knowledge Base

Junxure Charts

Junxure experts in our Development, Support and Training teams share their expertise every day in new articles posted in the Junxure Knowledge Base. You can search the Knowledge Base (also known as the "Junxure KB") for articles covering Junxure tips and tricks, interfaces, technical bulletins and topics in over 40 categories. In the KB you may discover helpful information that you will not find in any other Junxure support resource. You can access the Knowledge Base at **http://www.junxure.com/kb**

As an example, a recent article posted to the Knowledge Base provided information about how to work with the colorful charts in Junxure. **Click here** to view article.

Tip of the Month - Junxure Support

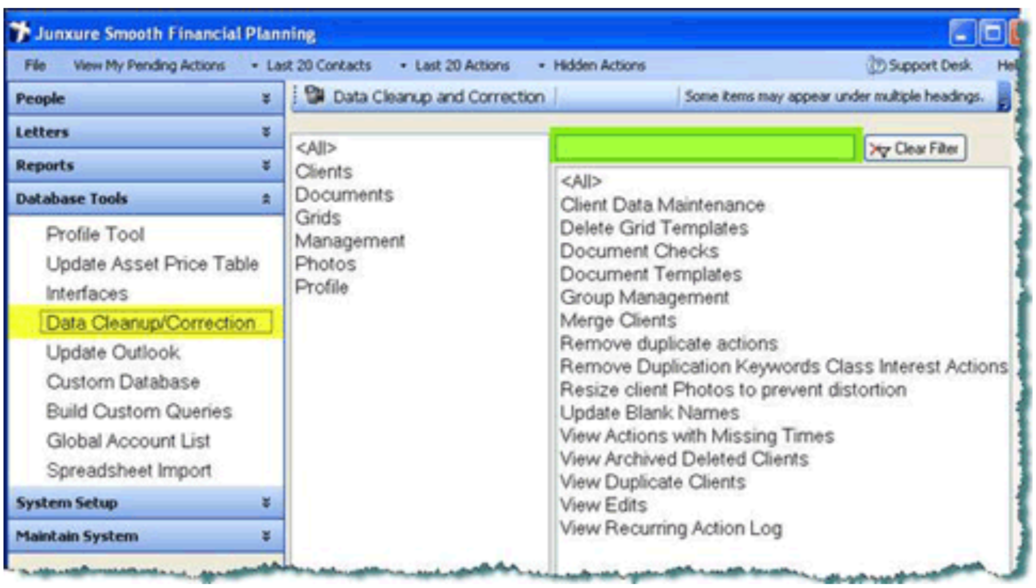
Client Data Maintenance

Perhaps your office previously segmented clients as A, B, C but now uses Gold, Platinum, Silver, or if all of the clients who were previously being billed in January are now being billed in February. Junxure gives you the ability to make this change all at once, without having to go into each contact to change the markers record by record.

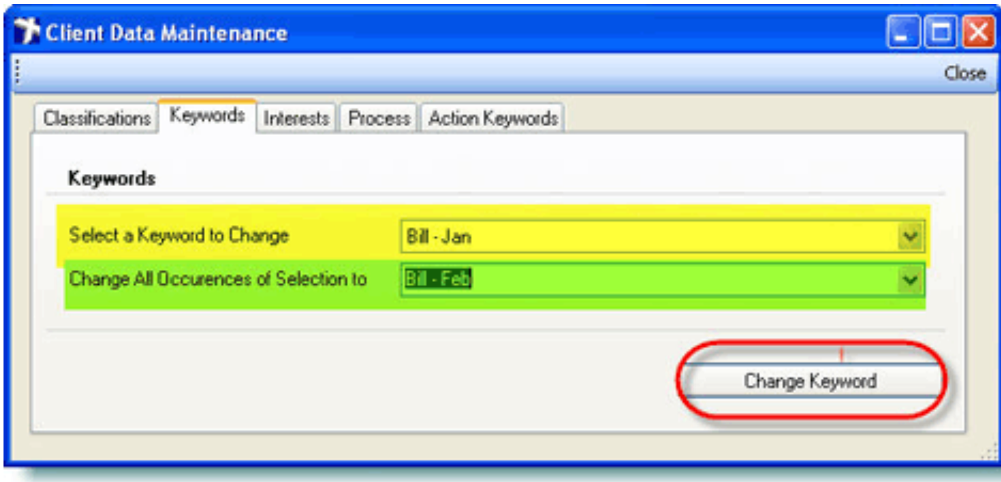
The Client Data Maintenance tool will change Classifications, Keywords, Action Keywords, Interests, and Processes across all contacts.

*Please see **List Data Maintenance** for information about changing the dropdown lists for future application of these markers (keyword, classification, etc). Using this tool will change all current data points, but will not remove the option from dropdown menus. This must be done by removing the old marker from List Data Maintenance.*

Step 1: In the Main Menu, choose **Database Tools**. Then select **Data Cleanup/Correction** and then **Client Data Maintenance**



Step 2: The window below will open. Click on the tab across the top of the window to choose which marker to change (classification, keyword, etc. as listed on the **Profile Tab** or Action Keywords as used on the **Action Detail Screen**)



Step 3: Use the drop down menu highlighted in yellow to indicate the marker to be changed, in this case all contacts that have the keyword to indicate January billing. Use the drop down menu highlighted in green to indicate what the data should be.

Step 4: Click the Change Keyword button. Junxure will report how many instances have been changed.

User to User Forum Highlights

Junxure Hot Keys

Many of our Junxure offices utilize the **User to User Forum** to gain insight into how other offices use the program. The **Forum** is a place post questions about specific categories, read responses and correspond with other users who also use Junxure and ClientView Live in their own practice.

This month we are presenting a user to user forum response about **Keyboard Shorts** or what is also known as "**Hot Keys**"

Junxure User 1: "I'm the original keyboard queen, and I am trying to find keyboard shortcuts."
Junxure User 2: "In Junxure, is there a "cheat sheet" of shortcuts somewhere?"

Forum Response: Here is a list of the keyboard shortcuts (Hot Keys) that are available in Junxure"

Text Box Hot Keys
In most textboxes throughout Junxure, you can use hot keys to quickly insert date and time stamps.

Ctrl + J will insert the user's initials, along with a date/time stamp like this:
JML - 08/01/2008 - 11:16:11 AM

Ctrl + ; will insert the current date like this:
08/01/2008

Ctrl + SHIFT +; will insert the current time like this:
9:41:32 AM

Main Menu Hot Keys
In the Main Menu in the My Pending Actions Screen, there are some hot keys related to contact record searches.

Ctrl + L will open a client search by Last name

Ctrl + F will switch that search to First name

Ctrl + C will switch that search to Company

You must use the hot key of "Ctrl L" to open a search from the Pending Actions screen. The First name and by company search shortcuts can be used after the search form is opened. These shortcut additions were added in the Junxure version 7.2008.1013.1629 released 10/14/2008.

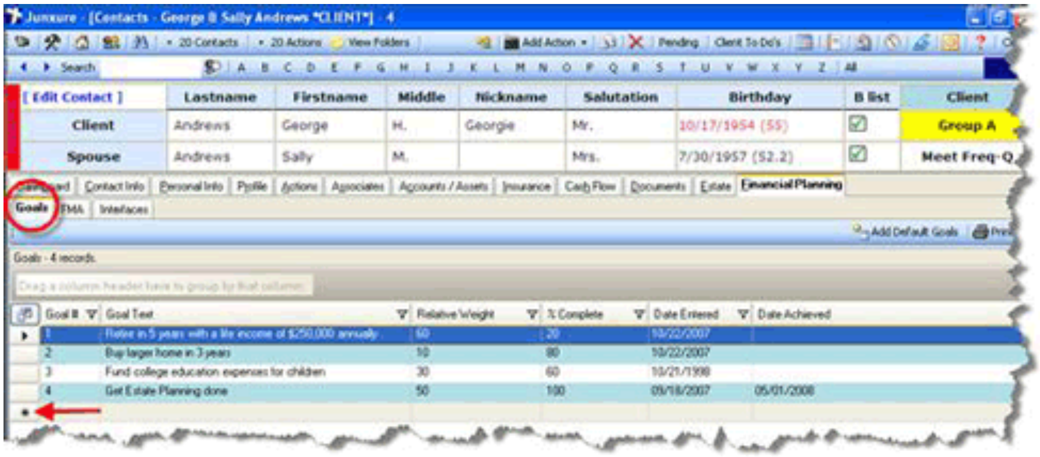
Junxure Solutions Group Expert Advice

The Goals Tab

Talking to clients via the phone on a regular basis doesn't seem to be good enough anymore as everyone is "talking to their clients", and in some cases maybe even yours. Therefore client meetings are becoming more important than ever and providing reassurance has become a static feature on the agenda. To enhance the value of your services utilizing Junxure, consider using the Goals Tab in demonstrating your ongoing focus on results.

Junxure not only can help your office streamline your meeting process by using keywords, prebuilt reports, action templates, action sequences, etc., but it also can help you to show clients exactly what you and your staff have accomplished to help them meet their personal and financial goals.

The **Goals Tab** (Contact Record>Financial Planning Tab>Goals Tab) enables you to record and track the progress of a client's financial goals through assignment of actions to individual goals. When you record client goals in the Goals Tab, you will be able to produce reports you can share with the client (during a meeting) which will outline what their goals are and what steps were taken towards their goals.

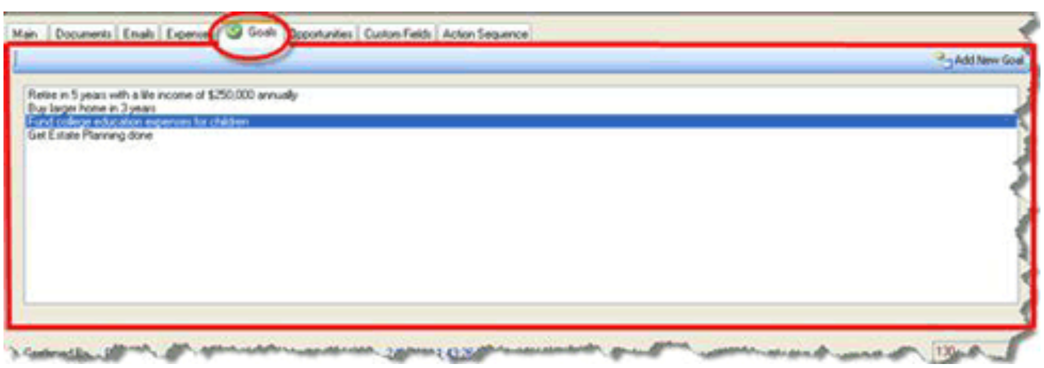


To add goals to a contact record, once on the goals tab you would begin typing information into this area where you see the "*", denoted by the red arrow above. The information you would note here would be:

- Name of the goal
- Relative weight (all goals entered should add up to 100%)
- Percent complete
- Date entered
- Date achieved

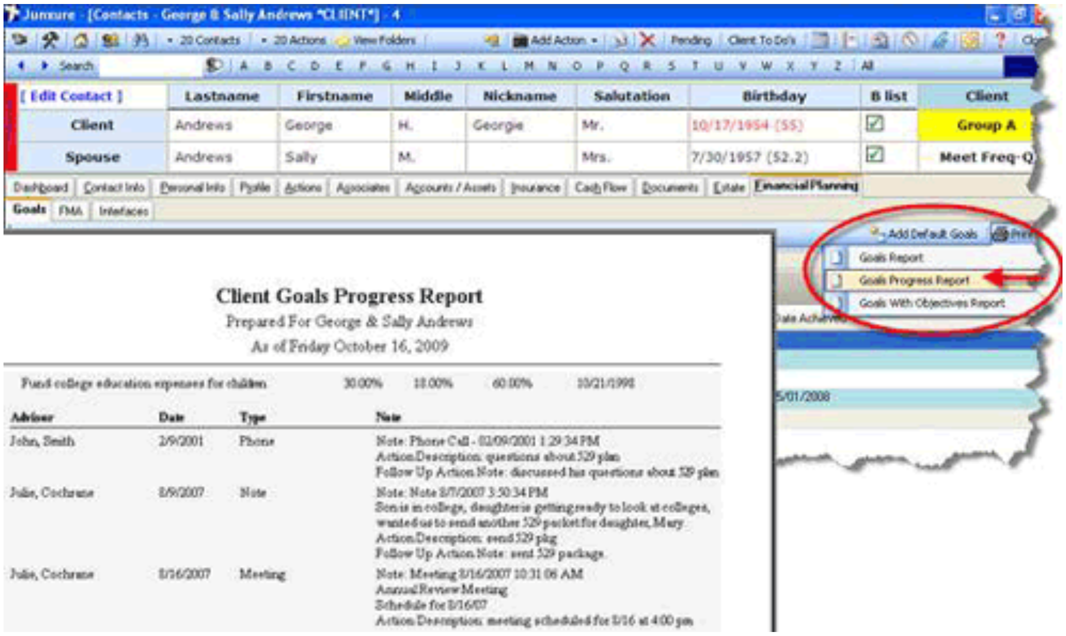
As mentioned above, Junxure not only provides you with the ability to record goals for each client, but also provides you a way to link actions you record within a contact record to a goal.

When you enter an action, from within the action detail window you will see a "**Goals**" sub-tab. It is from this sub-tab where you have the ability to link an action to a goal. To create a link between the action and a goal, simply highlight the goal this action is contributing to.



If you have recorded goals for your clients, and have linked actions to their goals, when it's time to sit down (at your meeting) and reassure clients you've been working for them in this challenging economy, you can show them exactly what your staff has been doing on their behalf. (This doesn't require you to log onto Junxure and show them your screen.)

From within the main **Goals Tab** (Contact Record>Financial Planning Tab>Goals Tab), located in the upper right corner of the grid, there is a print button. This button allows you to print several different reports associated with Goals, one being **Goals Progress Report**, noted below by the red arrow. When this report is selected it will create a dated document listing all of their goals, accompanied by each action you have linked to each goal allowing you to discuss how far they have come since the last time you met with them, making each meeting something they look forward to and see value from.



Using this additional feature that Junxure provides allows you to offer even greater value to your clients and they will appreciate the reports and your focus on their goals.

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. Beginning in the month of November, all web-based classes will introduce forthcoming Junxure 8 enhancements and additions. 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.

Ongoing Education Classes Scheduled for the Month of November includes:

- **Scheduling & Tracking Meetings with Junxure & Microsoft Outlook**
- **Manage & Report on Actions in Junxure**

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**.

Tech Support Reminder

All Junxure users have direct access to Junxure Technical Support from 9:00 am to 6:00pm Eastern time, Monday through Friday by calling 866-JUNXURE (586-9873) option 1 or by emailing us at **support@junxure.com**.

Our team is trained and qualified to troubleshoot all Junxure issues, and is backed up by the Junxure Development team to resolve most Junxure issues the same day. By scheduling in advance, we can also perform migration to a new server at no charge (as long as we can remotely connect to both the old and new servers).

In general, it is not necessary for your IT specialist to be involved in troubleshooting Junxure issues. At your request, we are always happy to work with your IT specialist, but if you rely on IT specialist services from a 3rd-party IT support provider, any charges incurred will be your firm's responsibility.