

Junxure News, Training & Tips - April 2010

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Action required - Upgrade MoneyGuidePro before May 1, 2010

An update to the MoneyGuidePro interface is now available.

MoneyGuidePro is a client-centered Financial Planning and Retirement Planning Software for Goal Planning, Insurance Needs Analysis, Asset Allocation, and Estate Planning. Junxure exports data to MoneyGuidePro via a button located on the contact record under the Financial Planning tab » Interfaces tab.

Beginning May 1, 2010, Junxure customers will not be able export data from Junxure to MoneyGuidePro until they have downloaded this update.

What to do now:

Junxure 7 customers – click [here](#) to download and install the update. You should overwrite the existing file located at Junxure\AssetImports\JunxureMGP.

Junxure 8 customers – will be prompted to update when you start the export.

If your office currently uses a version below Junxure 7, please contact us at 1(866) 586-9873, option 3.

Not sure which version you have? In Junxure, click Maintain System » About Junxure. The version will appear at the top of the popup.

Changes in this update affect Junxure and ClientView Live:

1. Added security token to Junxure – a new measure by MoneyGuidePro to heighten security. Junxure customers will see no change in their experience.
2. ClientView Live fields – if your firm has ClientView Live, you can now set up clients with access to three new links from MoneyGuidePro:
 - o Current Allocation – this shows a pie chart of their accounts
 - o Net Worth – displays a table showing net worth
 - o [MoneyGuidePro Guest Account](#) – this feature opens a new browser where clients can view customized account information set up by their advisor.

Spring Cleaning your Junxure Database

It's that time of year again to make sure your Junxure database is operating at maximum efficiency. Refer to [this article](#) from a past newsletter for more information. Or sign up for the [Spring Clean your Junxure Database](#) class.

[What's New at Junxure](#)

Download the Latest Updates with the Junxure Upgrade Wizard

Junxure 8 users now have the ability to download the latest updates right from their desktop using the Junxure Upgrade Wizard. Use this [step-by-step guide](#) to get started.

Stay current with your updates and ensure that you are using the latest Junxure technology.

Haven't upgraded to Junxure 8 yet? Details on upgrading are available [here](#), or give us a call at 1(866) 586-9873.

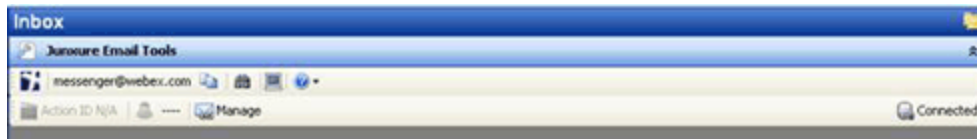
[Favorite Feature of the Month](#)

Junxure Email and Calendar Tools (Outlook Add-In)




A small add-in that packs a punch! Did you know that the Junxure Email and Calendar Tools (also known as the Outlook Add-In) let you import a copy of your Outlook emails into Junxure? That they give you the ability to schedule appointments in Junxure that appear on your Outlook Calendar?

Junxure Email Tools

The Junxure Email Tools are located above any folder in Outlook that contains emails (your Inbox or your Sent folders, for example).



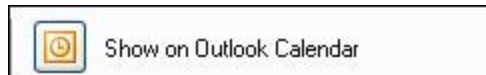
Use Junxure Email Tools to:

- Manually import a copy of your Outlook emails to Junxure using the Junxure Import button 
- Search for a client using the Client Search button , then import a copy of related Outlook emails to Junxure.
- Move an email to a new or existing Junxure action or remove it from a Junxure action by using the Manage Email Option  Manage .
- Import multiple emails to Junxure at once.

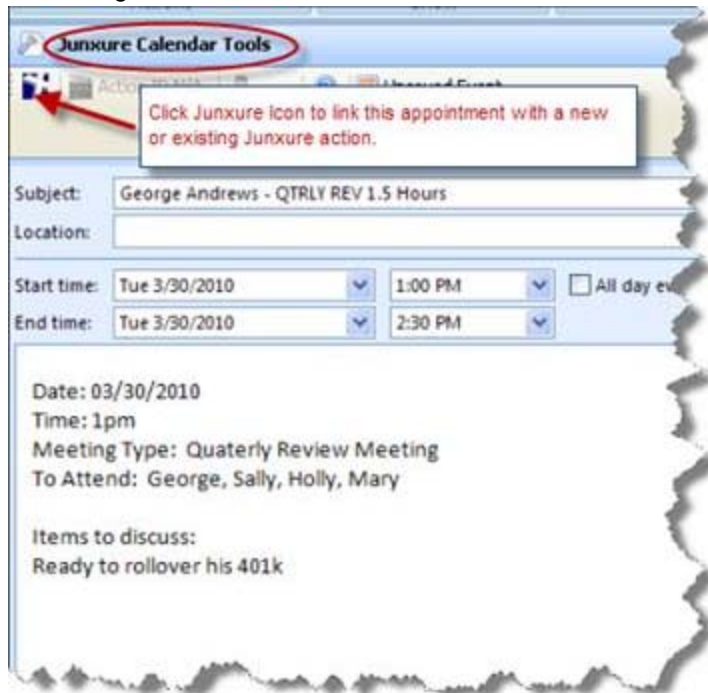
Junxure Calendar Tools

The Junxure Calendar Tools are located at the top of an appointment window in Junxure. Use this helpful tool to:

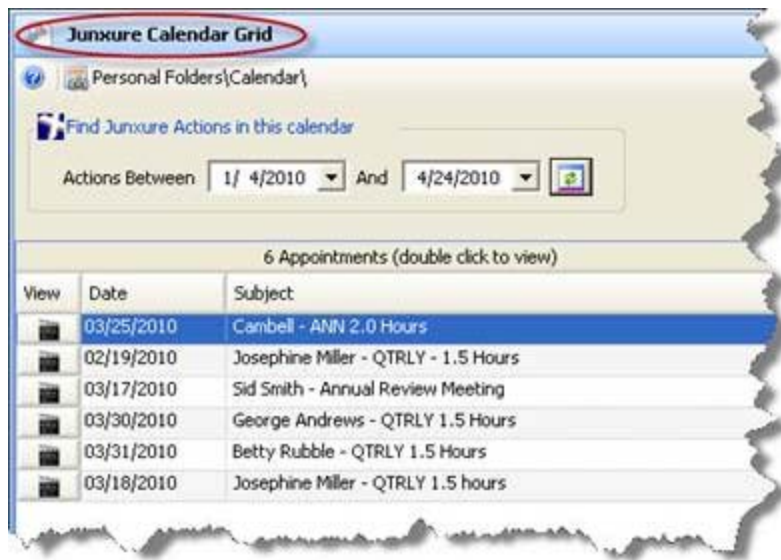
- Schedule appointments in Junxure that flow to Outlook. After [setting up your calendar](#), open the action and click on the Show on Outlook Calendar button.



- Schedule appointments in Outlook which can then be linked to a new or existing Junxure action.




- Use the Junxure Calendar Grid to quickly move back and forth between your Outlook calendar and the associated Junxure action allowing to you review notes recorded in the action before an upcoming meeting, or allow you to make sure notes are updated in Junxure should an appointment time change.



For more information, read [this article](#) that explains all the features of Junxure Email Tools (Outlook Add-In). There's also a great training video that helps you [Set-up Outlook Calendar](#) and [Make Outlook Appointments](#).

Don't see your Junxure Email or Calendar Tools (Outlook Add-In)? It may be disabled. Click [here](#) for instructions on how to enable the tool for your system.

Want even more information? Take advantage of the drop-down Help feature in the Junxure Email Toolbar  that includes training videos, online help and Knowledge Base articles.

[Client Spotlight](#)

DeLynn Zell of Bridgeworth Financial, Birmingham, AL



Advisors DeLynn Zell and Scott Mullins headed the implementation of Junxure in their office of 26 people – no small task. How did they get their office up to speed using the tool?

With 12 advisors and 14 staff members, Bridgeworth Financial recognized that they needed a powerful CRM tool that was not only an upgrade from their current process, but also a game-changing system that allowed their staff to focus on client service while increasing productivity.

In the fall of 2009, DeLynn Zell began the process of introducing the firm to Junxure, through discussions and meeting demonstrations. The result was a strategically implemented "all hands on deck" approach to migration that started in late November and ended when the firm began exclusively using Junxure after the first of the year.

The steps they took:

1. **The Introduction.** It was no secret that the firm needed to find a more suitable CRM tool. But change is daunting. DeLynn began introducing the staff to Junxure with screen shots and snippets of video that showed real-life examples of the tool and how it could work for the firm. The result was less trepidation and more excitement about the possibilities.
2. **Assembling the Key Person Team.** "The key for us was to let the staff take the key role in this process," explains DeLynn. Because the firm is broken down by advisor, a key person was designated for each "team" right from the beginning. Those key people then began working with Julie Cochrane, a Junxure Solutions Group Trainer.
3. **Conversion to Junxure.** During the data migration period, DeLynn held a Key Person Event, where the key people brainstormed ideas on how Junxure would best work for their firm. They also set up the classifications, keywords, list of custodians and account types that the firm would use universally.
4. **The Sandbox.** To alleviate some of the pressure of using a new tool, the firm had between 2-4 weeks to "play" in the system before they received onsite training. DeLynn provided the entire staff with the link to the educational videos at Junxure.com, and tasked them to complete each video.
5. **Training.** Three weeks after migration, Julie Cochrane, a Junxure Solutions Group training specialist, facilitated an on-site training day to ensure DeLynn's staff was comfortable using Junxure. Because the firm had already completed the videos and used the tool, the onsite training was a productive, interactive event.
6. **Show Time.** After the onsite training, the staff started meeting every week, even logging one all-day event to begin creating action sequences, action templates, and email templates for the firm. It was especially helpful that this period occurred over the holidays, DeLynn notes, when office traffic tends to slow down. After the first of year, Junxure was fully implemented and used by everyone in the firm.

"Junxure really was written for financial planners," says DeLynn. "The ability to take notes and assign actions is just so intuitive."

Was it an overnight process? No. Plenty of pre-planning on DeLynn's part went into making the transition as seamless as possible, keeping everyone on board without disrupting the office workflow. The Junxure Solutions Group also played an integral part, tailoring the on-site training to fit the firm's unique needs. The group effort was worth the investment.

"It's saving everybody and hour a day of work, and they love it!" says DeLynn.
"Junxure is the best investment our firm has made in 22 years."

Tell us your story! Send an email to training@junxure.com

➔ Tip of the Month - Junxure Support

Reduce Your Junxure Backup Space with the Audit Log

Running short on server space? Modifying your settings in the audit log can help you reduce costs by condensing the amount of backup space Junxure takes up on your system:

Change the number of days to retain your records: The default setting for Audit Records is to retain all records. This can take up a sizeable amount of space - Junxure captures all edits in all fields as well as timestamp information, user data, and old and new versions of changes. You have the option to condense stored data by changing the number of days to retain these records.

Click [here](#) for a step-by-step guide to modifying your settings.

➔ Junxure Solutions Group Expert Advice

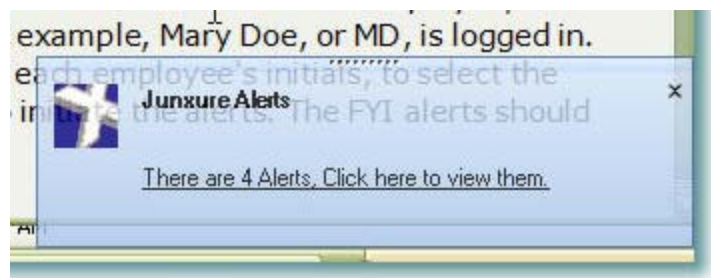
Stay on Track with Junxure Alerts and FYIs

Are you ignoring your Alerts and FYIs? You may be letting important information slip through the cracks.

What are alerts? Why do I need them?

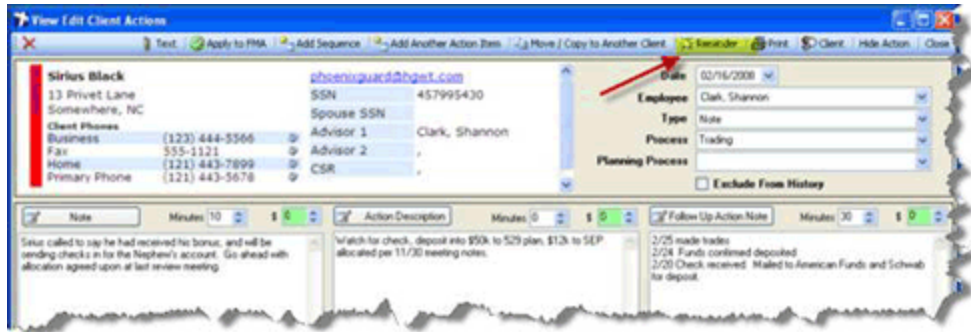
Junxure's pop-up system of alerts is designed to give you a running list of new items for attention. These could include new items requiring action, completed actions or information that another user feels others should be aware of. The [My Alerts](#) menu option allows you to launch your action alerts on demand.

Alerts appear as popups on the bottom right of your screen in Junxure.



Types of Alerts:

- Action Item Alerts. Generated when a new action is assigned to you. See [Adding a Single Action](#) for more information.
- FYI Alerts. Users can manually create FYIs to notify others of status changes or notes that do not necessarily require an action. See [Adding An FYI](#) for more information about creating FYI Alerts in the action details.
- Reminder Alerts. Initiated by the logged-in user. Use these alerts as reminders for existing tasks that are set to go off (like an alarm clock) in minutes, hours, days, months or on the day the task is due. To create a Reminder alert, click the button at the top right hand corner of any [Action Detail](#) as shown below.



What Alerts and FYIs Do For You:

- ➔ Allow you to control your workflow and address action items in a timely manner
- ➔ Help you avoid overlooking important tasks
- ➔ Keep you up to date on client activity
- ➔ Using FYI alerts instead of sending an email can be a huge timesaver because it prevents typing duplicate messages. Also, with easy access to the actual associated action, you've now got all the important details at your fingertips. FYI alerts even track whether or not you have confirmed that you read your alerts!

Alerts and FYIs were designed to improve the efficiency of your office workflow and keep you in the loop on client activity. Unfortunately, the alerts feature is one area of Junxure that many firms fail to take advantage of or worse, misuse.

Most Common Mistakes That Could Affect the Efficiency of Your Office:

- Ignoring alerts by postponing them or choosing to "Postpone All"



when they pop-up

- Turning alerts "off"
- Ignoring FYI alerts
- Sending Outlook email to keep others in the loop instead of using the Junxure FYI alert feature.

Are you using your alerts and FYIs to their full potential? Want to learn more? Check out this [short video on Alerts and FYIs](#).

Reminder: Practice Management Virtual User Group

Topic: [Compliance – How Junxure can help with your Compliance](#)

Date: April 30, 2010

Time: 1:00 PM (ET)

Cost: \$75 per computer logged in (session size limited to 25 firms)

How to register: Visit our website at <http://www.junxure.com/training> or [click here](#).

Erin Kincheloe, Director of our Junxure Solutions Consulting and Training Group, is your host. Erin is a former advisor who used Junxure in her firm, and has provided training and consulting to many of our Junxure clients.

While Erin will share ideas and "best practice" insights during this 1 hour virtual session, it is also for sharing YOUR QUESTIONS, IDEAS AND SUGGESTIONS with others in the group.

Please note: These User Groups are not training classes – they are discussions on practical applications of our tools as well as offering practice management suggestions for your office.






Contact: You can reach the Solutions Group via email at training@junxure.com or via phone at 1-866-586-9873, Option 5.

Transform Your Business Workshops – Sign up now for May and June

Hold the Dates: May 7, 2010 in Raleigh, NC and June 4, 2010 in San Francisco for our next Transform Your Business Workshops.

Think your CRM is just a data storage tool? Think again.

Junxure was designed to go far beyond the basic day-to-day tasks of a typical CRM tool. From the ground up, its features and functionality were built to help advisors:

-  Increase customer service
-  Strengthen customer loyalty
-  Streamline office efficiency
-  Boost productivity
-  Positively impact your bottom line

If you are ready to take the next step and harness the power behind Junxure - this workshop is for you.

[Click here to register today!](#)

Date	Location	Hotel	Time
Friday, May 7	Raleigh/Durham, NC	Homewood Suites by Raleigh-Durham Airport/Research Triangle 4603 Central Park Drive Durham, NC 27703 Phone: 1-919-474-9900 Use code "JUN" to receive special hotel rate.	8:00am – 4:00pm (ET) <i>lunch included</i>
Friday, June 4	San Francisco Bay Area, CA	Courtyard San Francisco Airport 1050 Bayhill Drive San Bruno, CA 94066 Phone: 1-650-952-3333	8:00am – 4:00pm (PT) <i>lunch included</i>

*More workshops are planned and will be announced as they are scheduled.

Ready to sign up? Want more information? Click [here](#).

[Upcoming Junxure Web Classes](#)

If you are new to Junxure or already proficient with the basic features, our web-based training curriculum 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 March include:

Date(s)	Time	Class
March 30th - April 28th	2 PM (ET)	Junxure Basics
April 9th	2 PM (ET)	Spring Cleaning – Maintaining an Efficient Junxure Database
April 26th	1 PM (ET)	Junxure 8 Essentials
April 29th	2 PM (ET)	Systematize Office Tasks and Procedures Using Junxure's Workflow Tools

Make sure you register early! For more detail about each class or to register for our upcoming web classes [click here](#).

All web-based classes will introduce Junxure 8 enhancements and additions.



www.junxure.com/learnmore • 1-866-JUNXURE (586-9873)
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