Junxure Newsletter

Junxure News, Training & Tips – August 2010

In This Issue:

Reminder Actions

Upgrade to Junxure 8.7

Have you heard? A new version of Junxure is available – See What's New for a summary of new features and enhancements.

How to Upgrade:

The transition to Version 8.7 is quick, easy and can be done at a time that's convenient for you.

Version 8 Users: In Junxure, go to Maintain System > Check for Updates. Follow the Junxure Upgrade Wizard instructions to complete the process.

Version 7 Users: You can perform the upgrade from Version 7 directly to Version 8.7 using our step–by–step Junxure Update Guide.

You also have the option to call Junxure Support at 1(866) 586–9873, option 3 to schedule the upgrade.

Not sure which version of Junxure you're on? Check the bottom of your screen in Junxure or go to Help > About Junxure from the top right menu to see your version number.

What's New at Junxure

- Junxure Version 8.7 now available!
- ClientView Live Update Includes New Security and Client Data Features
- Junxure is now compatible with Microsoft® SQL Server® 2008 R2 Express

Junxure Version 8.7 now available!

We are proud to announce the release of Junxure Version 8.7 – an enhancement to Version 8!

Version 8.7 includes a new PortfolioCenter® Import Wizard that significantly improves data importing from the PortfolioCenter® portfolio management software (from Schwab Performance Technologies®), along with new features and functionality that allow users to better manage their client data through enhancements to formatting, reporting and navigation.

Some of the new features and functionality include:

- Enhanced PortfolioCenter Integration – The PortfolioCenter interface offers broader and more customizable data integration to include Account-level as well as expanded Asset-level data, as well as the ability to import Management Fees.
- Junxure Outlook® Inbox Routing enhancements – An easier, more efficient way to handle incoming emails, this feature allows users to route and block emails by email address, domain, and subject content.
- Formatted Text in Actions – Based on advisor feedback to simplify their desktop display and highlight important items, new formatting functionality for actions enables you to change text colors, add bullets, highlight text, and customize font size and style.
- Enhanced Action Navigation – The new Linked Actions tool makes it easier to search for and link related actions. Quickly find specific client actions with filters and keywords.
- Improved Workflow – Recurring Action Sequences trigger a single action or a set of related actions to ensure that tasks are automatically initiated and followed up on, simplifying workflow processes.

See What's New or read our press release for more information.

ClientView Live Update Includes New Security and Client Data Features

New enhancements to Junxure ClientView™ Live offer master users the ability to create a more secure and seamless user experience.

Note: ClientView Live users will not see any changes in the portal unless the master user logs on and changes any of the new settings.

Feature Highlights for Master Users:

- New Security features. Add challenge questions, change password complexity and

expiration, and add/hide the Forgot Password link.
- New Setup Account features. Better customize and control the information clients see online.

New online help topics are available for reference under the System Setup menu: Setup Account Features, Security Features, and Add Documents to Announcements.

Read our press release for more information.

Junxure is now compatible with Microsoft® SQL Server® 2008 R2 Express

In conjunction with the release of Junxure Version 8.7, we are happy to announce that Junxure is now compatible with Microsoft SQL Server 2008 R2 Express, which has a 10GB database size. Junxure utilizes SQL Server for database management; the previous version of SQL Server (2005 Express) had a 4GB limit.

Note: Any firms still utilizing Microsoft Server 2000 will remain limited to the use of SQL version 2005 Express since Microsoft has not made SQL Server 2008 Express R2 available on this older server operating system.

For more information, see our complete list of Junxure System Requirements.

Junxure in the News

CRM Software, Inc. Receives "2010 Best of West Palm Beach Award" for Second Consecutive Year

July 2010 – For the second consecutive year, CRM Software, Inc. has been selected for the 2010 Best of West Palm Beach Award in the Computers, Peripherals & Software category by the U.S. Commerce Association (USCA). Click here to view the official press release.

The USCA "Best of Local Business" Award Program recognizes outstanding local businesses throughout the country. Each year, the USCA identifies companies that they believe have achieved exceptional marketing success in their local community and business category. These are local companies that enhance the positive image of small business through service to their customers and community.

Nationwide, only 1 in 70 (1.4%) 2010 Award recipients qualified as two–time Award Winners. Various sources of information were gathered and analyzed to choose the winners in each category. The 2010 USCA Award Program focuses on quality, not quantity. Winners are determined based on the information gathered both internally by the USCA and data provided by third parties.

CRM Software, Inc. Named one of the "Hottest Companies in the Southeast"

July 2010 – In order to recognize the fastest growing technology companies in Kentucky, Tennessee, North Carolina, South Carolina, Georgia, Florida, Alabama, Mississippi, Arkansas, and Louisiana, Lead411 is proud to announce the release of its "Hottest Companies in the Southeast" award. Click here to view the official release.

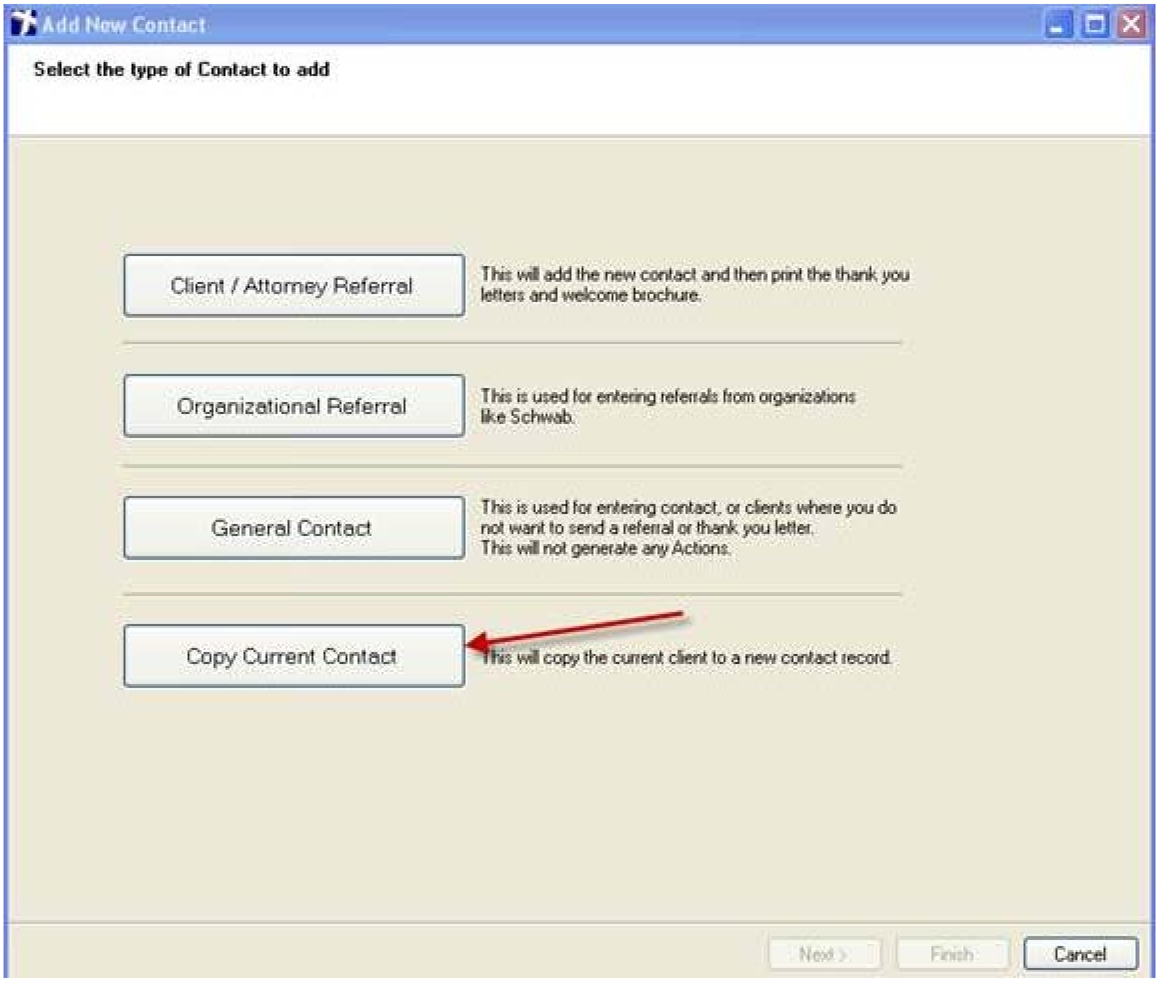
Each day, the Lead411 research team scours through 600+ press releases and business articles including venture capital fundings, company launches, new office openings, customer press releases, etc. This information has given insight to which are the fastest growing companies in the U.S. Their “Hottest Companies” awards have been created to recognize these fast growing companies in different geographic regions. This particular list originally started with over 2400 companies and it has been narrowed down to the top 91. “We have been tracking fast companies for our customers for the past 10 years,” said Tom Blue, CEO of Lead411, “and we felt it was important to recognize these growing brands publicly.”

Top Tips

Handling Divorced and Deceased Clients

Here are some helpful tips to consider when changing contact records due to a divorce or a death:

1. Avoid changing a contact’s name on the couple’s record. Changing the name may affect the folder names for storing contact documents. The documents will not be lost, but you may have issues accessing folders.
2. Keep divorcing contacts in one record until after the divorce is finalized. This is helpful if you need to initiate actions or send communications that involve both parties before the divorce is finalized.
3. Use the Copy Contact Feature to create a new contact record once a divorce is finalized. If you continue to work with one or both of the contacts, create a new contact record for each of the parties. The Copy Contact Feature gives you the ability to open a contact record and quickly copy the current client to a new record.



You can also move or copy any actions that you'd like to appear in both the 'old' record and the 'new' record using the 'Move/Copy Action' button at the top right of an action.

4. Consider a divorced contact record or a surviving spouse record a new client. You may need to create a new financial plan, new goals, *etc.* for this client.
5. Associate divorced contacts on their Associates tab. This is helpful in retaining the history of contacts (in particular if you are retaining both contacts as separate clients). Also, classify each record appropriately on the Profile Tab.
6. Keep your staff informed! Make a note of a divorce or a death on the Personal Info Tab, and keep notes in the Actions and in the Important Note field. You should also delete the spouse's name from the 'old' record.
7. Determine how you want to update a deceased client's record if there is a surviving spouse. There are two options – you can remove the deceased contact from the client record and change ownership of accounts to the surviving spouse, or you can keep the deceased client in the system as a record owner, and classify them as am "Ex-Client." For more information and helpful tips, click here.
8. Change classifications for deceased clients without a surviving spouse. Change the classification from "Client" to "Ex-Client", color code the record and add a "0" priority keyword of "Deceased" so that it shows in the upper right hand corner of their contact record.

9. Don’t overlook address and greeting fields. 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 to a deceased or divorced contact. Also, review the record for email addresses, phone numbers or addresses that were specifically for the deceased or former spouse.

Do you have a tip to share? Let us know! Send us an email at admin@junxure.com.

Favorite Feature Spotlight

Formatting Actions Notes

New in Junxure 8.7! Junxure now offers advanced text formatting within action notes. Action Notes are fields in the center of the Action screen that are used to store details regarding a client and any follow–up items that need to occur in relation to this action.

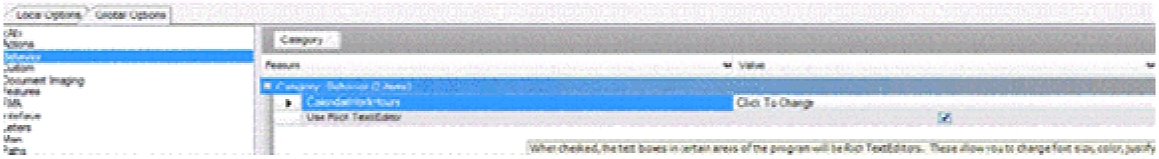
You can now format and add:

- Text color
- Text size
- Font style
- Bullets
- Highlighted text.

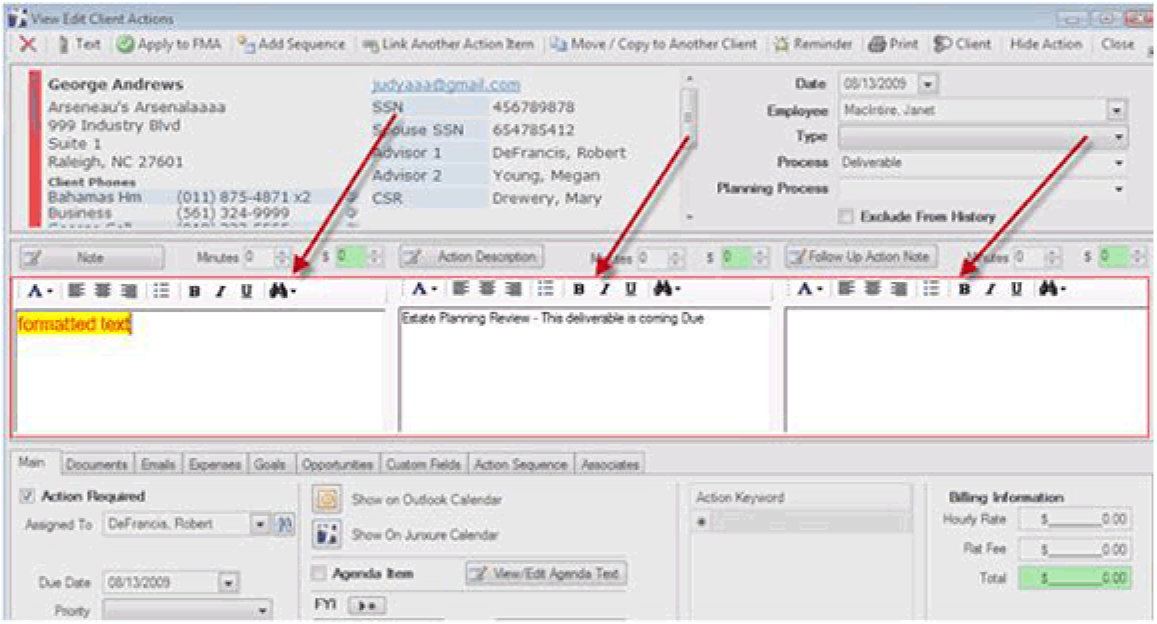
This formatting functionality also applies to notes in the Notes Library and to Action Templates, where you can format not only the templates, but Action Sequences and Recurring Actions.

To get started, you must first enable rich text boxes in Junxure:

1. Go to ***Maintain System > System Options > Global Options > Behavior***. Click in the checkbox next to Use Rich Text Editor.



2. Your actions will now display a formatting menu over action note fields. Select the text you wish to format and use the buttons provided.



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Business Development Best Practices

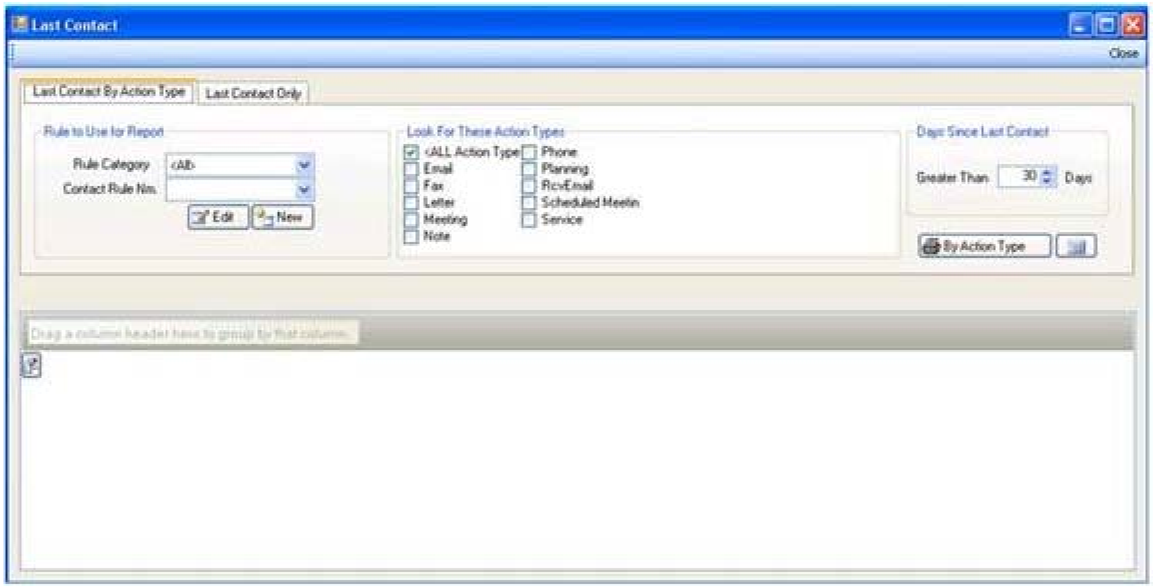
Last Contact Report

Are you staying on top of how often you contact clients and prospects? Need to know quickly when you last called a prospect?

The Last Contact Report is a great tool that can report on all or specific types of Actions based on the last interactions you had with a client or prospect.

Get Started:

1. In Junxure, go to Reports > Reports List > Last Contact Report



2. Determine if you want to create a report based on either the Last Contact By Action Type or by only the Last Contact (see tabs above).
3. On either tab, you can select your desired criteria to customize your report.
4. Choose to print your report or preview the information in a grid.
    - If you choose to preview in the grid, you will also have the ability to double click on any of the results to open that contact's record in Junxure.

For more information, check out the Last Contact Report article in Online Help.

Junxure Training Solutions Reminder

JUNXURE Practice Management Virtual User Group

Topic: How Junxure can help with your compliance
Date: Friday, August 27, 2010
Time: 1:00 PM (ET)
Cost: $75 for first computer logged in $25 per additional connection (session size limited to 25 firms)
How to register: Visit our website at http://www.junxure.com/training or click here.

This session will be hosted by Erin Kincheloe, Director of our Junxure Solutions Consulting and Training Group. As a former advisor who used Junxure in her firm, as well as training and consulting with many of our Junxure clients (including Greg Friedman's firm), Erin brings a wealth of "best practice" insights to these sessions.

We will cover ways in which Junxure can assist you in compiling the information that you will need when an auditor shows up on your doorstep. This material is based on Greg Friedman's (the original user of Junxure) personal experience with SEC audits in his firm. We will talk about items that the SEC requested from Greg and how to produce that information quickly and efficiently using your Junxure database.

Please come ready to ask questions and share 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 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.

Upcoming Junxure Web Classes

Our web–based curriculum is one of many training options available to help you recognize the full potential of your Junxure system.

Register early! These classes fill up quickly as space is limited. For more details about each class or to register for an upcoming class, click here.

August Online Classes include:

Date(s)	Time	Class	Designed For
August 3rd – 31st	2 PM (ET)	Junxure Basics – A series of 10 classes that are designed for both the key person (responsible for the set–up and maintenance of Junxure), and all other staff members who use Junxure.	Key Person & Entire Firm

For more details about each class or to register for an upcoming web class, click here.

Note: All web–based classes are taught using Junxure 8.7.

Junxure in the Field

Junxure representatives will be in attendance at the following conferences in 2010:

October 1st	Technology Trends for 2010 & Beyond (New York, NY)
October 9th – 12th	FPA Annual Conference (Denver)
October 26th – 29th	Schwab IMPACT® 2010 (Boston)

We'd love to meet you, so please stop by and say hello!

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