

Junxure News, Training & Tips - January 2010

In This Issue:

- What's New: ClientView Live's new Document Assembly Wizard
 - Favorite Feature of the Month: User Fields
 - Tip of the Month: Make Sure Your Emails Are Getting Captured Automatically
 - User to User Forum Highlights: Grid Templates
 - Solutions Group Expert Advice: Junxure Check-up
 - Junxure Training Solutions: Practice Management Virtual User Groups
 - Junxure in the Field
 - Upcoming Junxure Web Classes
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What's New at Junxure

ClientView Live's new Document Assembly Wizard

ClientView Live now includes a robust Document Assembly Wizard that can help your firm eliminate the chore of manual paper reports.

It's easy to customize each client's report package – perhaps a personalized cover letter followed by performance and tax reports, then your market commentary, followed by a couple of Junxure client reports. You can even take client-specific exceptions into account to automatically customize a client's package from the basic template.

The Document Assembly Wizard can quickly build a customized report package for all (or some) of your clients. Report Packages can assemble reports from:

- Any MS Office document (all file types from Office 2000 to 2007)
- PDF files
- Batched Portfolio Management Reports from PortfolioCenter or dbCAMS
- Junxure reports
- Junxure mail merge templates

Just run your batch of reports in PortfolioCenter or dbCAMS, then run the ClientView Live Document Assembly Wizard. The Wizard will create a personalized package of reports in a single PDF for each client then automatically distribute the package to the client's private ClientView Live web portal. You can even print them the old-fashion way.

Many firms now update report packages once a month rather than making their clients wait for them each quarter.

ClientView Live is an add-on to Junxure that offers your clients a secure web portal with document vault, on-demand reports and enhanced communication channels. For more information, contact our Junxure Sales at 866-JUNIXRE (586-9873) x2 or by email at sales@junxure.com.

If your firm already subscribes to ClientView Live, this upgrade is included in your annual fee.

➔ Favorite Feature of the Month

User Fields

The user field types include: Number, Currency, Drop-down Value List (Combo), Text, Date, and a Yes/No Check Box as shown highlighted in yellow below.

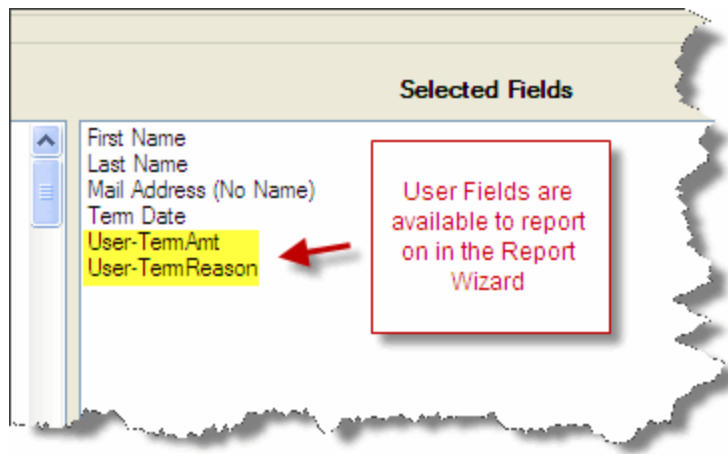
Six user field types are available

WebReports	WebUserID	WebPassword	NUMBER	CURRENCY	COMBO	TEXT	DATE	Y/N	2009 Gift	2008 Gift	Fee Schedule
and77789	4567567	and77789	10,000	\$ 565.00	VALUE THREE	Type Text Here	01/16/2010	<input checked="" type="checkbox"/>	\$ 100.00	\$ 75.00	1.0%

To create user fields, go to [List Data Maintenance](#) located in the Main Menu > System Setup > List Data Maintenance > User Fields

You can add user fields to a report created in the Contact Report Wizard and use these fields in mail merge/letter writing, but you cannot search for contacts or build rules based on user fields.

User Fields in the Report Wizard



Report on Terminated Clients

12/22/2009 4:21

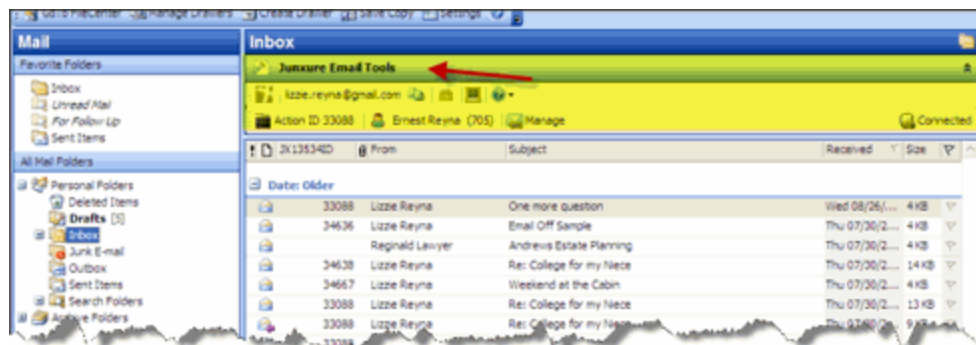
First Name	Last Name	Mail Address (No	Term Date	TermAmt	TermReason
Deborah K.	Barnes	8305 Greywinds Dr. Raleigh, NC 27615	04/04/2008	\$100,000	Moved
Isabella	Talboti	4506 Levy Court San Anselmo, CA 94901	09/01/2009	\$250,000	Didn't like your hair color
Kim Lisa	Marshall Lynn	34566 Main Street American Canyon, CA 99999	02/03/2009	\$0	Deceased

➔ Tip of the Month - Junxure Support

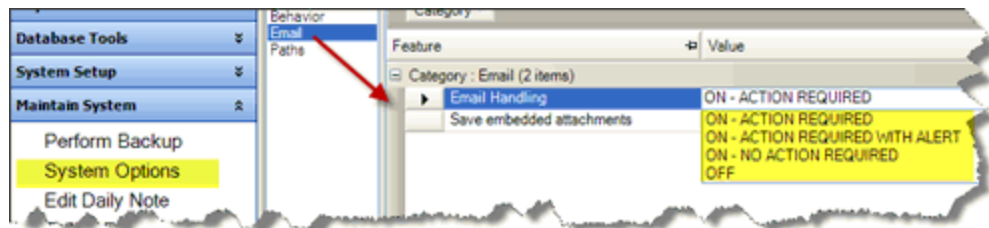
Make Sure Your Emails Are Getting Captured Automatically

In order for Junxure to automatically capture your Outlook email, there are four conditions that must be met:

1. You must have the Junxure Outlook Add-in (a.k.a. Junxure Email Tools) installed on your computer. In most cases, the Outlook add-in is installed or upgraded at the same time as any Junxure install/upgrade.







2. If you would like emails to be captured automatically, make sure that your System Option for email handling is set to one of the "ON" options. To check this, go to the Main Menu > Maintain System > System Options > Local Options > Email Handling. Otherwise, set your email handling to "OFF". For more information about the various email handling options, please review our video [Email Handling Setup](#).



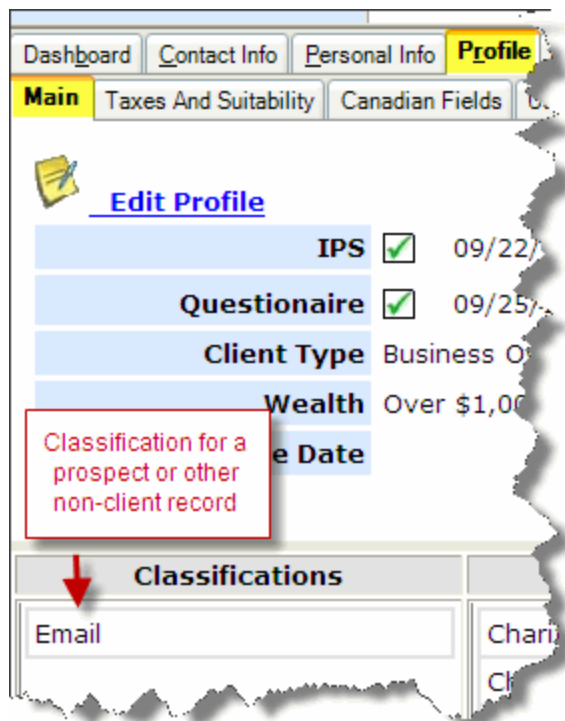
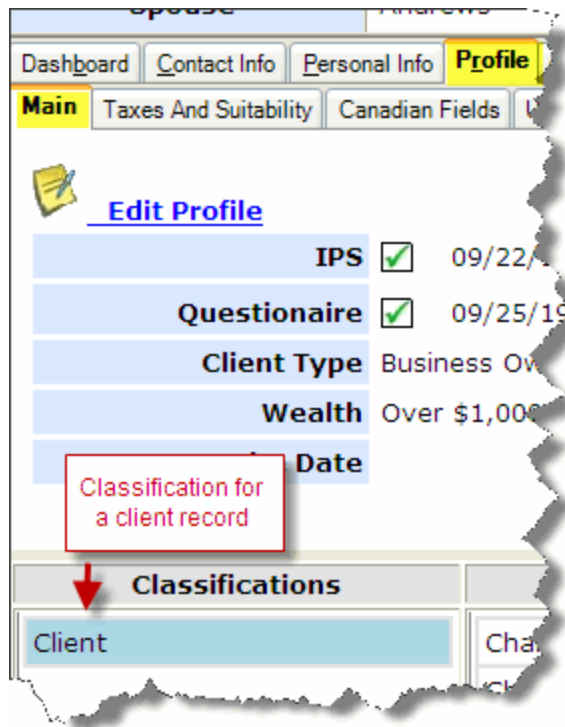
3. If you would like email captured for a contact, there must be one or more email addresses listed on the Contact Info tab in their Junxure record. All email addresses listed in this area will be captured whether they are listed as primary, additional, or not.



 **Email Addresses**

Type	Email	Primary	Add.
Home	bubandrews@gmail.com	<input checked="" type="checkbox"/>	<input type="checkbox"/> 
Assistant	june@net.net	<input type="checkbox"/>	<input type="checkbox"/>
Email	george@net.net	<input type="checkbox"/>	<input type="checkbox"/>
Julie Jones _ Director	dfdsf	<input type="checkbox"/>	<input type="checkbox"/>
Spouse	home@net.net	<input type="checkbox"/>	<input type="checkbox"/>
Spouse Home	home@net.net	<input type="checkbox"/>	<input type="checkbox"/> 
Spouse Work	sally@net.net	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Work	george@net.net	<input type="checkbox"/>	<input checked="" type="checkbox"/> 

4. The contact must have a classification of Client OR Email (spelled exactly this way) recorded in the Profile tab. By adding a classification of Client for contacts in your database that are clients, Junxure will know to capture emails, both sent and received. For any contact in the system that is not a client, such as a prospect or vendor, you would instead add a classification of Email indicating to Junxure that you would like to capture emails, both sent and received as well.



When these criteria are met and you send or receive an email in Outlook, Junxure will try to match an email address listed on the Contact Info tab for any given contact record. When there is a match, Junxure will make a copy of that email and then record the email copy in an action under the appropriate contact record. The original email in Outlook will not be deleted.

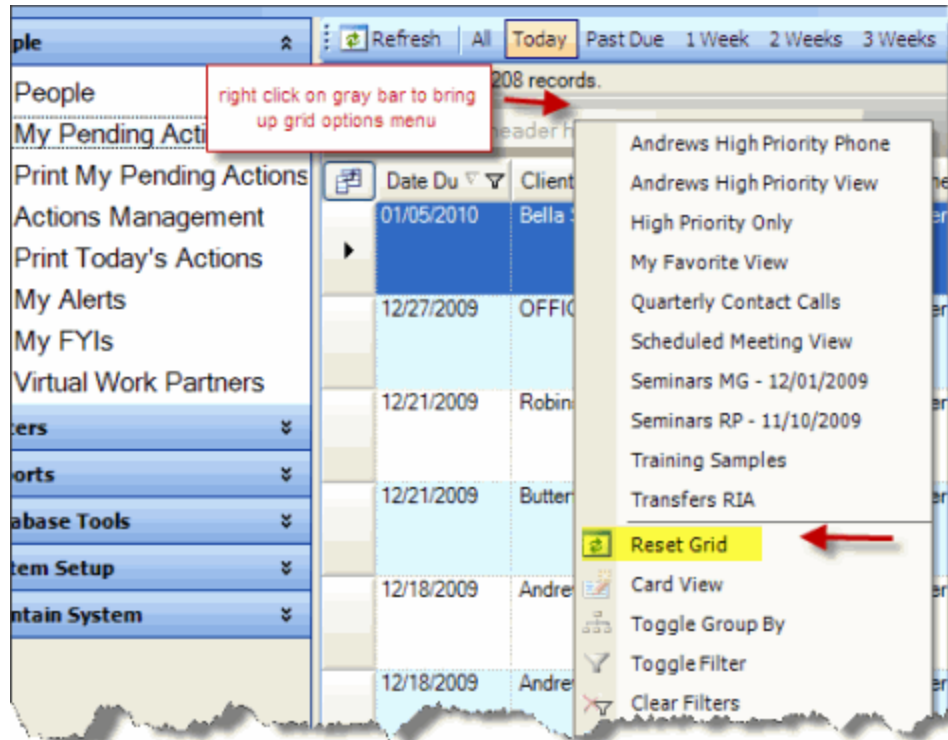
➔ User to User Forum Highlights

Grid Templates - Access templates created by other staff members

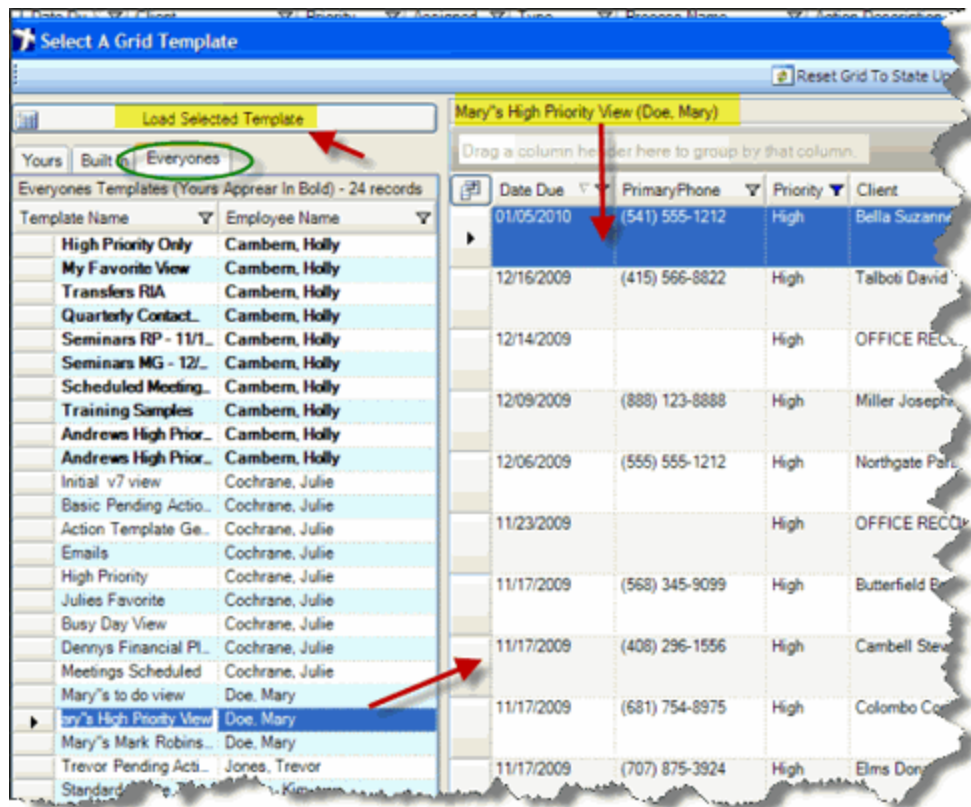
Many of our Junxure offices utilize the User to User Forum to gain insight into how other offices use the program. To register for the User to User Forum [click here](#).

Junxure Office: *I've created some grid templates (Actions, Accounts, etc...) that I would like other users within our office to utilize. Is it possible to make this available to them or does each user have to setup their own?*

Answer: Any user can use any other user's saved grid templates. To access other user's saved grid templates, right click on the gray bar above the grid to bring up the grid options menu and then select Reset Grid.



In the tab called Everyone's, you will be able to view all templates created and saved by anyone in your office for that particular grid. Any grid template that you have created and saved will be shown in bold. When you select any saved template, you will be able to preview the layout in the right-hand side and you will have the option to "borrow" that grid layout, simply by selecting "Load Selected Template". That grid layout will now appear in your grid.



Junxure Solutions Group Note: To learn more about grid customization and saving templates please watch our [Grid Basics Video](#).

➔ Junxure Solutions Group Expert Advice

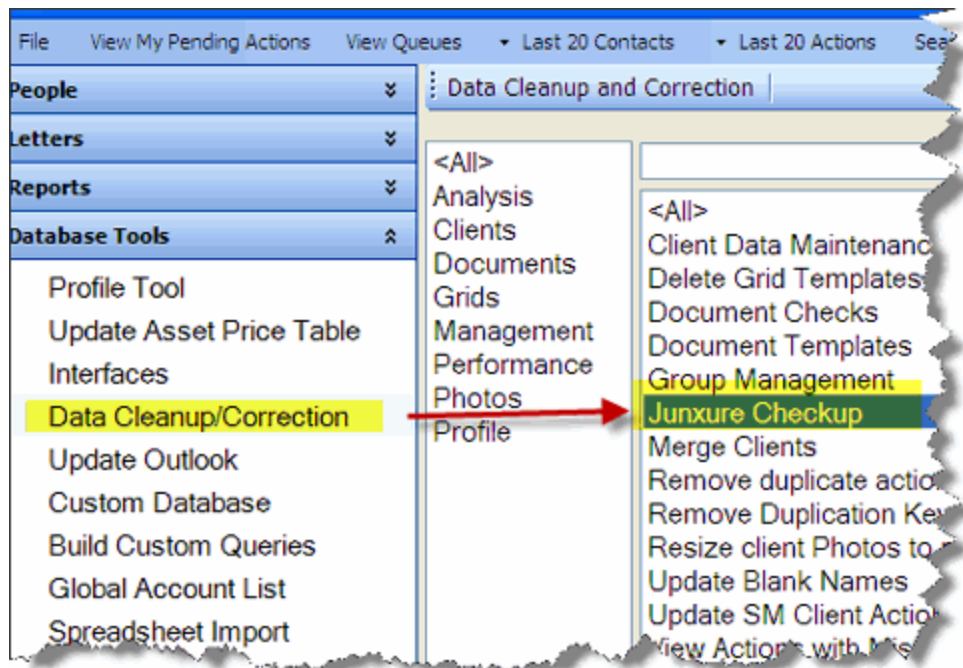
How do I know what I don't know? Junxure Check-up Can Help

"The help function of the future."

Bob Veres

Junxure is such a robust program sometimes you may feel like you don't even know what you don't even know. The *NEW* Junxure Check-up (introduced in Junxure 8) can help your firm identify which mission-critical Junxure aspects you're using well, and where increased adoption can pay off. Using models based on the successful and best practices of Junxure users, this check-up report analyzes your current Junxure usage patterns to pinpoint your best practices and identify opportunities that will quickly benefit your firm.


To access the Junxure Check-up go to the Main Menu > Database Tools > Junxure Checkup




Based on your firm’s overall usage patterns the Junxure Check-up will produce a report offering a top-to-bottom list showing Junxure practices already at the level of "best and highest use" and specific opportunities to quickly build productivity using Junxure.

This action-oriented summary shows you what to look at first – it is ordered to provide advice on the capabilities of Junxure which can benefit your firm the most at this time.




With handy, where-to-go links for online help, educational videos and additional resources on each item, you can create your own self-guided action plan or contact us for assistance in reaching your goals for efficiency and service with Junxure.

You will see shaded highlights and an icon  to guide you to areas with the highest potential to draw greater value from Junxure in operations, customer service and profitability. In each case, you will also find topical links to online help, Educational Video Library entries and web class resources for the feature.

Areas where your current practices are already at the level of the best practice model will be marked as well with an icon  and resource reference information is also included.

Junxure Check-up Sample Report

Item Name	Item Description	Contacts Pct/Count	Client Pct/Count
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 Classifications	Each contact record should have at least one Classification. Classifications are one of the most important ways to group contacts for reporting and contact searches. This is a percentage score showing both total contacts in the database and client only records that have at least one Classification listed on the Profile tab. Keywords v. Classifications Creating Classifications Training Class - General Staff 1 Classification and Keywords - video	83 %	100
 Classifications LDM	This is the number of Classifications you have created in List Data Maintenance. Keywords vs. Classifications Profile Tab Profile Tab Video Training Class - Key Person 2 Classifications vs keywords - video	23	
 Unused Classifications in LDM	This is the number of Unused Classifications in List Data Maintenance. Keywords vs. Classifications Profile Tab Profile Tab Video Classifications vs keywords - video	7	

In the example report shown above, you will notice that for Classifications, it was determined, based on experience and best practices of Junxure users, that in order to fully utilize classifications and other Junxure features, each contact should have at least one classification. In the second to last column on the right it shows that only 83% of the contacts in the Junxure database have classifications.

This resulted in a  warning for Classifications.

If you require some assistance in interpreting and applying the results of this Junxure Checkup Summary, please contact our Junxure Solutions Group at 1-866-JUNXURE (586-9873) option 5 or click this link to send an email to training@junxure.com.

Junxure Training Solutions

Back by Popular Demand – JUNXURE Practice Management Virtual User Groups

Junxure Practice Management Virtual User Group sessions 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.

In these 1 hour virtual users groups, Erin will share ideas and insights on the various topics. These sessions are also for sharing YOUR QUESTIONS, IDEAS AND SUGGESTIONS with others in the group.

Schedules and Topics:

January 29th	Workflow and Systematizing the Office – Action Templates, Action Sequences, Recurring Actions, Notes Library

February 26th	Mining your Database – Rules & Reporting
March 26th	Tracking Prospects, Business Development and Additional Revenue using Junxure
April 30th	Compliance – How Junxure can help with your Compliance Requirements

The number of participants will be limited to 25 per meeting in order to insure a high quality, interactive experience for the attendees. Attendance will be on a first-come, first-served basis. The purpose of these meetings will be to discuss specific practice management and implementation ideas using Junxure.

YOUR QUESTIONS AND INPUT ABOUT HOW YOU USE JUNXURE ARE ENCOURAGED!

Cost to attend these sessions is \$75 per computer logged in (unlimited attendees). In addition to limited class size, the number of classes is also limited and attendance will be on a first-come, first-served basis. Please visit our web site at <http://www.junxure.com/training> or simply [click here](#) for scheduled times and to sign up.

NOTE: This is not a training class and should NOT be attended in lieu of our training classes. These User Groups are discussions on practical applications of these tools as well as offering practice management suggestions for your office.

If you have questions contact the Solutions Group via email at training@junxure.com or via phone at 1-866-586-9873, Option 5.

Junxure in the Field

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

January 17th – 20th	AICPA Advanced Personal Financial Planning Conference (Orlando, FL)
February 3rd – 6th	TD Ameritrade 2010 National Conference (Orlando, FL)
February 11th	Cambridge Investment Research Technology Forum (Anaheim, CA)
February 17th – 20th	2010 "T3" Technology Tools for Today Conference (La Jolla, CA)

Stop by and say "Hi!" We're happy to discuss Junxure Mobile, ClientView Live and the upgrades and improvements in Junxure version 8, like the Junxure Check-Up, the Prospecting & Opportunities Dashboard, Client Profitability Reports, Business Development Dashboards, etc.

Upcoming Junxure Web Classes

Junxure Web-based Training 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 January include:

Date(s)	Time	Class
January 28th	1 PM (ET)	Junxure 8 Essentials
January 22nd	2 PM (ET)	Tracking Prospects & New Business
January 6th, 7th, 13th, 14th	2 PM (ET)	Key Person Class Series
January 19th, 20th, 21th, 26th, 27th	2 PM (ET)	General Staff Class Series

Make sure you register early! These popular classes fill up quickly as space is limited. For more detail about each class, to review the schedule, or register for our upcoming web classes [click here](#).

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



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