

Junxure News, Training & Tips – July 2010

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Reminder Actions

- Plan ahead! Schedule a Server Move
- Backing up your Junxure database – Part 2

Plan ahead! Schedule a Server Move

Have you upgraded your hardware recently and need to plan a server move for your Junxure database?

Server moves must be scheduled in advance to ensure a Junxure Support team member is available to accommodate your needs. Please allow a lead time of 5–10 business days for an appointment.

As a reminder, Junxure Support performs server moves during regular business hours only (9:00am – 6:00pm ET, Monday – Friday). Server moves usually take one to two hours to complete depending on the amount of data from Junxure that you need migrated.

Requirements:

- You must be an authorized user listed on the client's [Authorized User List Form](#) to schedule a move of your Junxure database.
- You must have access to both your existing server and your new server

To Schedule: Contact us at 1(866) 586–9873, option 3 or send us an email at support@junxure.com.

Back up your Junxure Database – Part 2

Last month we featured [an article](#) reminding you to back up your Junxure database regularly.

In addition to backing up your actual Junxure *database*, it's also important to keep an additional backup of the *information* stored in your system.

During your initial installation of Junxure, our support team configured a Junxure file directory that is stored locally on your network. This directory stores all of your Junxure data – including documents, captured emails, client folders, templates, etc.

Don't forget! When backing up your database, be sure to back up your Junxure file directory along with the location of your backup files. Without a backup of this information, Junxure support will not be able to restore Junxure data should your local drives crash.

Note: If you don't have a SQL Agent in your backup software, be sure to exclude the JunxureData\JXSQLData or the JunxureData\Junxure\Data folders from your backup routine. This live database is already being backed up on a nightly basis and stored by default in the JunxureData\Junxure\Backup folder.

Questions? Not sure what to back up or where to look? Have your IT person contact Junxure Support at 1(866) 586–9873, Opt. 1.

[What's New at Junxure](#)

- [Junxure Search Beta – Search Our Online Help Resources](#)
- [Update on Microsoft Office 2010](#)

[Junxure Search Beta – Search Our Online Help Resources](#)

We're proud to announce a quick and easy way to search across our support resources to find the information that you need.

Use Junxure Search to:

- Quickly find information on a specific topic in Junxure or ClientView™ Live
- Find *How-to* articles across many of our online help resources
- Filter resources on your search into collections such as videos and KB articles

[Learn More!](#)

Please note: This is a Beta version of our search page – we are steadily adding resources and topics to our search index to deliver the most efficient and time–saving functionality. You can still

access all of our online support resources on our support page [here](#).

Update on Microsoft Office 2010

With the recent release of Microsoft Office 2010, we've received some inquiries about how this new version of Office will work with Junxure.

At this time we are not supporting Office 2010, but we are currently testing compatibility.

We recommend that our customers continue using the following versions of Microsoft Office: 2000, XP, 2003 or 2007 with service packs.

We will communicate any changes in this status as soon as more information is available.

Questions? Send us an email to support@junxure.com.

Tech Tips

Junxure Mobile Skins

Junxure Mobile customers – Are you using the right skin for your Smartphone?

Individual skins were designed to ensure that the formatting on your Smartphone screen appears properly.



To check your skin:

- From the Main Menu, click Select Skin
- Check to see if your Smartphone is selected. If not, choose the skin that best matches your phone.*

* Don't see your Smartphone? We try to ensure that most popular Smartphones work with at least one available skin. If you are unable to find a suitable skin, send an email with your Smartphone type to support@junxure.com.

BlackBerry users: Don't forget to refresh your individual screens after changing skins as screens may be cached.

Want more information on Junxure Mobile? Give us a call at 1(866) 586-9873, Option 2, or send us an email at sales@junxure.com.

Favorite Feature Spotlight

Mass Updates to Client Profile Information

Save time by using the Profile Tool and Client Data Maintenance – two tools that update profile information for multiple clients at once. These handy features are great for adding anything from keywords (sending holiday cards, notices for seminars) to interests (wine lovers, golfers) to classifications (alerts) across your database.



The Profile Tool enables you to enter keywords, classifications, interests and/or custodians to several contacts at once.

1. Click on **Database Tools > Profile Tool**.



2. To apply a rule to filter your database, use the Rule Category and Name. See the [Rules Builder](#) for more information about creating, editing and using rules. To view all contacts in your database, click Select All Contacts.
3. Click Apply Rule to update the grid. Choose which clients that you'd like to add or remove data to by clicking in the box next to their name.



4. Use the tabs to choose the type of data points to change: Keywords, Classifications, Interests, Custodians, Advisor 1 & 2, or the Record Owner.
5. Select the data point you want to remove or add from the available drop down menu.
6. Click Add or Remove (selected button will show green text) then click Go. Junxure adds the data point to the contacts' records and gives you a message that it was added for the number of selected contacts.
7. Click OK

For more information, check out [this video](#) and [this article](#) on using the Profile Tool.

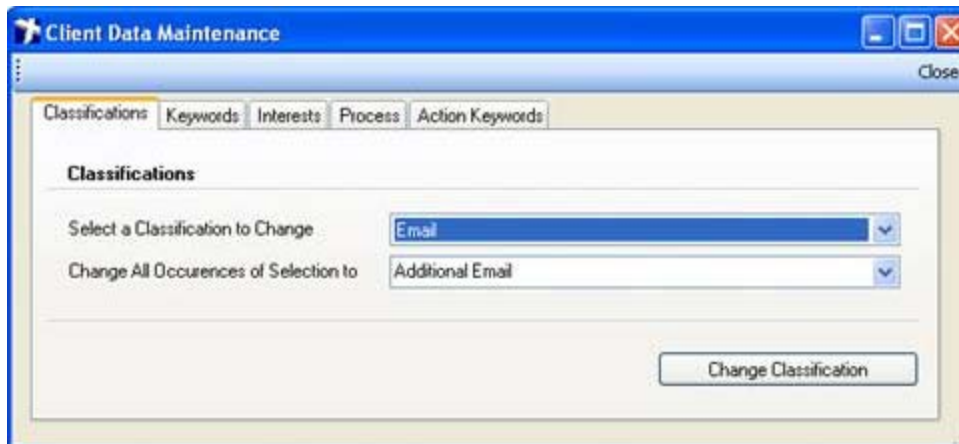
WARNING: Always run a local back-up of your Junxure database before running the Profile Tool. Go to Main Menu > Maintain System > Perform Back-up. If you are adding and removing an item to the same group of contacts, always ADD first before REMOVING data from a contact record.



The Client Data Maintenance feature allows you to select any classification, keyword, interest, process, or action keyword and change the selection to your preference across all clients. For example, if your office previously segmented clients as A, B and C but now uses Gold, Platinum and Silver, this tool will change those assigned keywords across all contacts.

Note: 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 data points from List Data Maintenance.

1. Click on Database Tools > **Data Cleanup/Correction**, double click Client Data Maintenance from the right hand menu. A dialog popup appears.



2. Use the tabs and the drop-down menus to select what changes you'd like to make.
3. Click Change Classification.
4. Click Close.

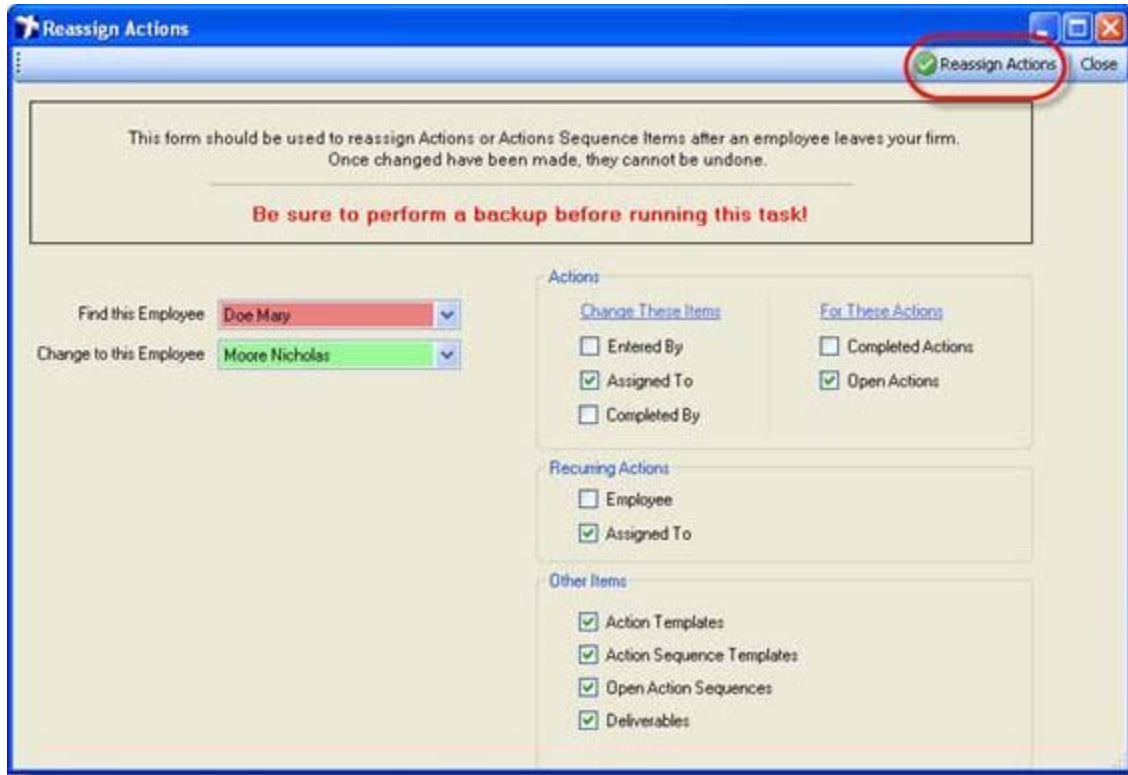
For more information, check out [this article](#) on Client Data Maintenance.

Best Practices

Systematizing Staff Transitions

Did you know that Junxure can help systematize your process for on-boarding, reassigning and releasing staff? Here are some best practices to help you create a repeatable process for handling staff transitions:

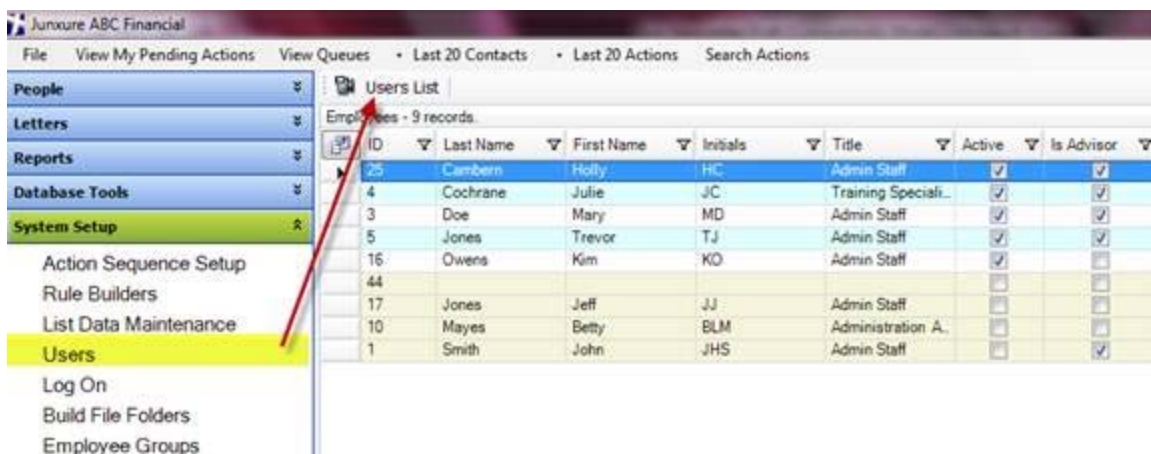
- New Users. Setting up a new user in Junxure is a great first step when you hire new staff. Watch [this video](#) which shows you how to add new users, change passwords, set up employee groups, and add digital signatures.
- Need to reassign actions? Go to People > Actions Management > Reassign Actions. This tool allows you to reassign all open actions, as well as any action templates, recurring actions, action sequences from one employee to another.



WARNING: Run a backup before you reassign actions. Also, be sure to change only “Open Actions” and “Assigned To” fields. Selecting “Completed Actions” or “Entered By” and “Completed By” would change the history of what a user did in the past.

For step-by-step instructions on the Reassign Actions tool, click [HERE](#).

- Don't delete employees! Every employee has a unique ID assigned to them and every action created by that employee is stored. If you delete that Employee ID, you will not be able to access that historical information. We recommend making an employee who is no longer with the firm Inactive.
 1. Go to System Setup > Users and find the user who is no longer at the firm.
 2. Highlight the row of the employee to deactivate, and then double click to open up the record.



3. Click to uncheck the “Active” checkbox.

4. Click Save.

Want more tips on handling new hires and staff transitions? We have many resources to help you – we recommend starting with our [Educational Video Library > Set-up & Maintenance](#).

Junxure Solutions Group Expert Advice

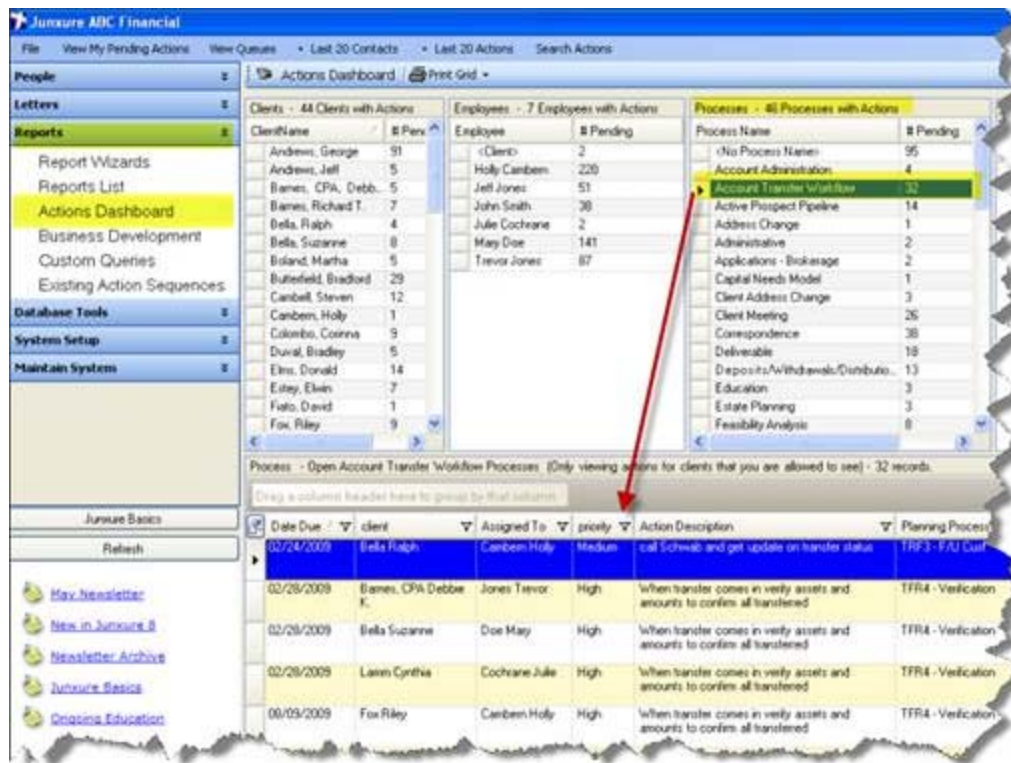


Junxure: The Spreadsheet Buster (Part 2): Tracking data stored in Junxure

Last month we encouraged you to try using Junxure instead of spreadsheets to store your data. Now that you’ve taken the first step, how can you use this information for tracking and reporting purposes?

Here are just a few ways you can use the data stored in Junxure:

- Contact Reports
 - Use the [Contact Report Wizard](#) to run customized reports that include your stored data; Save those reports so they can be accessed easily and at anytime.
 - Keep in mind: [Rules](#) and Reports are dynamic so as you update Junxure, your reports will reflect the very latest information.
- Workflow Reports
 - Search across the firm at the status of processes that are part of an action sequence by running a Global Action Sequences Report. (**Main Menu > Reports > Reports List > Global Action Sequence Report.**)
 - Easily check where each process is in the pipeline as it relates to the [planning process](#) field by running the Graphical Planning Work Status Report. (**Main Menu > Reports > Reports List > Graphical Planning Work Status.**)
- Action Reports
 - Use the [Actions Dashboard](#) (**Main Menu > Reports > Actions Dashboard**) to view everything that is pending across the firm. If you view a specific process, such as “Account Transfers”, you can quickly view outstanding workflow for all of your account transfers.



- Prospect & New Business Reports
 - Track prospects and new business potential by running customized opportunity reports ([Opportunity Report Wizard](#)) and database queries ([Opportunity Rule Builder](#)).
- Meetings / Client Touches
 - Check how often you are contacting clients and track which meetings are overdue by running the [Overdue Meeting Report](#) or the [Last Contact Report](#).
- ClientView™ Live
 - The information you enter into Junxure allows your clients to view assets, account and insurance information from [ClientView™ Live](#), their own customized web portal.
- Accounts/Assets Reports
 - Pull account data entered on the Accounts/Assets tab and then query the database for certain account types, positions held, asset classes, etc., using the [Account Rule Builder](#). Then use the [Account Report Wizard](#) to report on a variety of information including assets under management information.
 - View client [Account Information Reports](#) directly from data entered in the Accounts/Assets tab.

Still not ready to take off the spreadsheet training wheels yet? You can always export your report to Excel or right click on a grid to export data into a spreadsheet.

Want more information?: Call the Junxure Solutions Group and set up a personal web-based training session that can help you transition away from spreadsheets. [Ask about our discounted packages!](#)

Call 1-866-JUNXURE (586-9873) option 5 or email us at training@junxure.com.

Topic: [Tracking Prospects and New Business](#)

Date: Friday, July 30, 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](#).

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.

Hear from Erin and other Junxure users as they share ideas and insights for mining Junxure data. Learn how to use the Junxure reporting features to track important information about actions, employee productivity, accuracy of data, and much more.

Please come ready to ask questions and share your own 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.

For questions, call 1–866–JUNXURE (586–9873) option 5 or email us at training@junxure.com.

[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.

Make sure you 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](#).

July Online Classes include:

Date(s)	Time	Class	Designed For
July 1st – 29th	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.	Entire Firm & Key Person
June 15th	2 PM (ET)	Tracking Prospects and New Business – Part 1	Entire Firm (Advanced Class)
June 18th	2 PM (ET)	Tracking Prospects and New Business – Part 2	Entire Firm (Advanced Class)

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.

[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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