

### Junxure News, Training & Tips - June 2010

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#### [Reminder Actions](#)

- [Update your Authorized User list on file with Junxure.](#)
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#### [Update your Authorized User list on file with Junxure.](#)

Who's on your list? Junxure keeps an Authorized List of users on file that you have given our support team permission to handle certain requests related to your database.

Common support requests that require authorization include:

- Password resets
- Junxure 8 customers who need an admin password to perform automatic updates
- Limiting user access within the program
- Copying data from one machine to another

Review your staff list for any new hires or employees who are no longer with your firm – is your list up to date? Take a moment to fill out [this form](#) and send it back to us via email at [admin@junxure.com](mailto:admin@junxure.com).

Not sure who's on your list? Send an email to [admin@junxure.com](mailto:admin@junxure.com), or give us a

call at 1(866) 586-9873, option 3.

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## Back up your Junxure Database

Are you behind on performing your Junxure backup? You may have noticed a warning message on the bottom left hand side of your screen.

(Note: Screenshot below reflects warning message for Junxure 8 users.)



Junxure makes it easy to back up all or a part of your database. Just check the bottom bar on your screen to see your login name, Support ID and the last time you backed up Junxure.



We strongly suggest that you check your backups on a regular basis. For a step by step guide on backing up your database, [click here](#).

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## What's New at Junxure



### Test Drive ClientView Live!

Vrrroom! Vroom! Have you been thinking about adding ClientView Live to your Junxure arsenal?

Imagine having your own private cloud – a secure, encrypted web portal for your clients to access account information, documents and reports in real-time. ClientView Live is an add-on to Junxure that lets you communicate with clients quickly and easily over the web.

ClientView Live Test Drive Overview:

Click on any of the tabs in the top menu for more information, including:

-  Home tab: Alerts tie directly to Junxure actions
-  Accounts: The most current account details in an environment you control

- ➔ Insurance: Clients can view their insurance details when they need them
- ➔ Document Vault: Securely share reports and other files
- ➔ Live Reports: Your clients can view up-to-date reports on their schedule
- ➔ Contact Us: Your clients will be able to send you secure messages and attachments that appear in your Pending Actions in Junxure

Ready to try out our sample program and experience the tool from a client's perspective?

[Start the Test Drive Now](#)

Login Access:

Username: gandrews@119.com

Password: test1234

Questions? Send us an email at [sales@junxure.com](mailto:sales@junxure.com).

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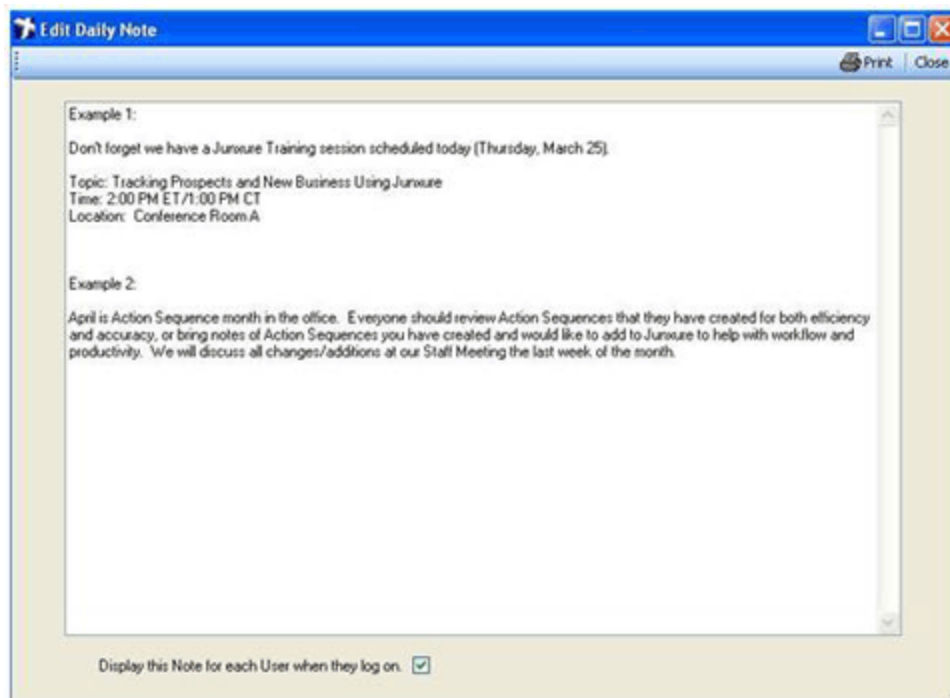
## ➔ Tech Tips

Use Daily Notes to Communicate Company-Wide

Did you know that you can create a message that your employees and co-workers will see as soon as they log in to Junxure? The Daily Note is a great way to communicate an important reminder or message to your staff. [Learn how it's done.](#)

Examples of daily notes include:

- ➔ Training reminders
- ➔ Important dates
- ➔ Scheduling changes



How do you use your daily notes? Let us know by sending us an email at [training@junxure.com](mailto:training@junxure.com)

## Favorite Feature Spotlight

### Demystifying Deliverables

What's a Deliverable? What's the difference between a [Deliverable](#) and a [Recurring Action](#)?

Deliverables	Recurring Actions
What it is: A task that occurs based on a timeframe but is not date-specific. (For example, a meeting with a client once a year.)	What it is: A task that occurs on the same date on a regular basis. (For example: the first of the month, the 15th, etc.).
Good for: Keeping track of meetings that get delayed or rescheduled. Deliverables can be grouped into multiple actions to implement service levels for your practice.	Good for: Keeping track of date-specific tasks such as a call to a client on their birthday or an RMD processed every year on December 1st. They ensure that nothing falls through the cracks.

Think of a Deliverable as a Client Service tool. When you have specific tasks for clients that occur on a regular basis (such as a goals or estate planning review), you can use Deliverables as a flexible alternative to Recurring Actions.

### Why Use Deliverables?

We all know that no matter how determined you are to keep regular client meetings on the calendar, conflicts inevitably occur. With Deliverables, the "clock" doesn't start

ticking to remind you of your next call or meeting until you've completed the last one. So no more premature reminders that you'll need to keep delaying or reschedule.

The differences may be subtle but could make a difference in how you manage your workflow. Deliverables are just another way that Junxure considers how you do business, offering you alternatives to setting up tasks and actions.

Want to learn more? Check out these great videos on Deliverables:

- [Deliverable Set-up](#): Learn how to set-up Deliverables which are tasks that occur based on a timeframe not tied to a specific to a date.
- [Adding a Deliverable](#): Add existing deliverables to a contact record.
- [Completing a Deliverable Action](#): Learn how to complete a deliverable action after it has been created.
- [Fulfilling Deliverables Before Due Dates](#): Learn how to take any action and fulfill a deliverable prior to its due date.

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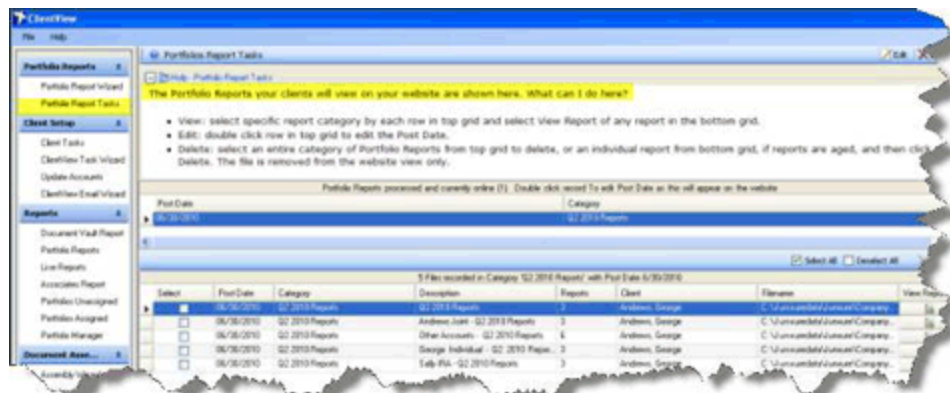
## ➔ ClientView™ Live Top 5

### Helpful Tips to Getting Started

Are you getting the most out of your ClientView Live site? Check out these five tips that can help you take your client service to the next level.

1. Keep your site current with Portfolio Report Tasks. Do away with clutter! Remove old files from the Portfolio Reports page to give your clients a clean layout that is current and relevant.

To remove old files, go to ClientView Live Setup Program > Portfolio Reports > Portfolio Report Tasks. You can remove an individual report or an entire post of portfolio reports.



Note: Deleting reports will not remove them from the clients CompanyFiles folder in Junxure.

2. Automatically Update Document Vault Files. Did you know that linked document vault files will automatically update if you make changes to the original linked files?

To update linked documents, open up the file that is linked and make your

changes. Save the file in the same location as before, using the same file name. Your client will instantly access the most recent document.

Best Practice Tip: Make sure all client documents are stored and updated from their document tab in Junxure.



Note: Do not rename or change the location of the original file.

3. Notify Clients that they can send you secure messages and documents. No more snail mail or unsecured emails! When a client sends you a message, a Web Action will appear in Junxure that will allow you to view the message and document. You will also receive an alert, and the action will appear on your pending actions list. No missing important messages from clients!

Note: Make sure your clients send attachments in either a PDF format or in a ZIP (Windows compressed format) file.

4. Create a web portal for Financial Professionals to access mutual client documents. With authorization from your clients, you can grant access to other financial professionals (CPAs, attorneys) to view client account information. This can be a great time saver especially during tax season; you can give a CPA direct access to a client's web portal or add client documents (such as a client's gain/loss report) to the document vault in the CPAs very own web portal!

[Watch a video to learn more!](#)

5. Build customized report packages with the Document Assembly Wizard. Forget manual collating, packaging and posting reports each quarter. With the [Document Assembly Wizard](#), you can start with a personalized cover letter, add performance and tax reports, your market commentary and then any client reports you want to include. You can even take client-specific exceptions into account to automatically customize a client's package.

Haven't signed up for ClientView Live yet? In addition to offering your clients a secure web portal with document vault and on-demand reports (including access to client Portfolio Reports), ClientView Live is the perfect channel for quick, efficient communication with your clients.

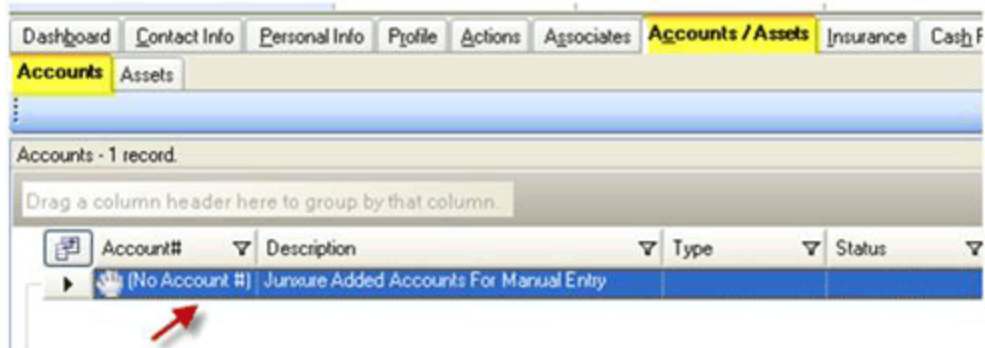
Want to learn more? Call us at 1(866) 586-9873, option 2 or send us an email to [sales@junxure.com](mailto:sales@junxure.com).

## ➔ User to User Forum Highlights

Our [User to User Forum](#) allows Junxure customers to communicate with each other about how they use the program. Below is an excerpt from a recent discussion that may be useful for your firm.

Junxure Office 1: In many of our client records, we have accounts that look like this:

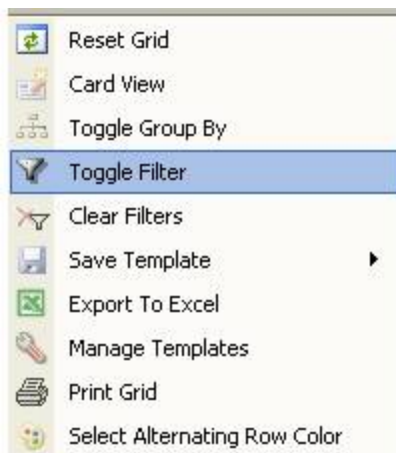
Account# Junxure-XXXX (where XXX is the client id)  
Description: Junxure Added Accounts For Manual Entry



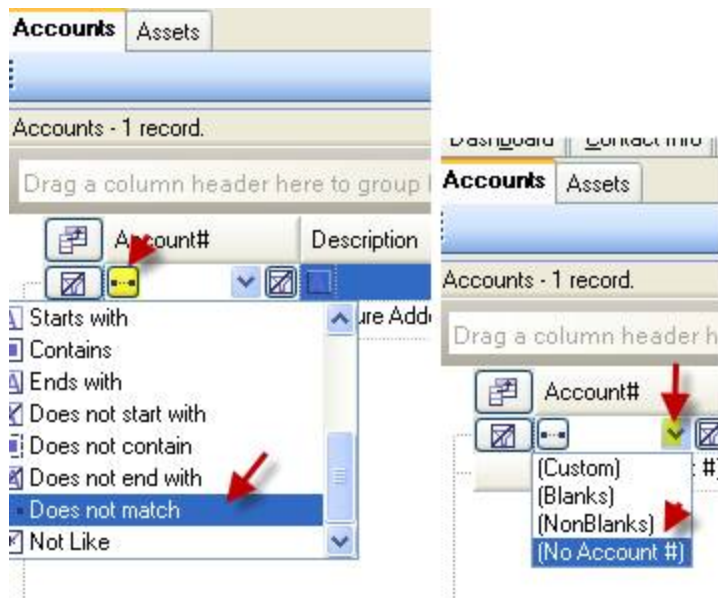
Can anyone tell me why we might have these accounts and what they are used for? I'd like to get rid of them if I can because we don't use them.

Forum Answer: Junxure automatically generates this account when you navigate to the Assets tab to ensure that an account exists to put any manually added assets where the account number is not specified.

TIP: Though you cannot remove this account, you can create a filter on the grid to hide that record. Right click on the top of the grid and click Toggle Filter.



Then click the button on the left hand side of the text box where you can type your criteria in and select "Does not match". Type in (No Account #) into the criteria box and it will hide the Junxure added account.



Ask a question! Join the discussion! To register for the User to User Forum, [click here](#).

## ➔ Junxure Solutions Group Expert Advice



### Junxure: The Spreadsheet Buster (Part 1): Getting Started

Still depending on spreadsheets to track information? Why waste time when Junxure can help you track that same information and store it in one central location that's accessible to everyone on your staff?

This month, we encourage you to try using Junxure instead of spreadsheets to store and track your data.

Benefits of using Junxure to store and track your data:

1. Avoid duplicating data entry
2. Your staff can now easily and instantly update data in one master version
3. Reports are easy and consistent, and can be run by anyone on staff
4. Data gathering is now consistent and centralized
5. The most up-to-date information is right at everyone's fingertips

What should you be tracking in Junxure? Let this checklist help you build your list.

### Junxure Spreadsheet Buster Checklist

New Business – Questions:

- What future money do you expect to come in from your existing clients?
- What are the sources of this new business? (Inheritances/401k

rollovers)

- How much new business do you expect to bring in this year?

Prospects – Questions:

- How many active prospects are we working with?
- How many prospects converted to a client in 2010?
- What sources are these prospects coming from?  
(Seminars/Ads/Referral)
- What are the investable assets for each prospect?
- What are the actual assets that came over if they became a client?

Meetings – Questions:

- When is the next scheduled meeting client by client?
- What meetings are coming up in the next month?
- Who do we need to schedule for a meeting?

Account Transfers in Process – Questions:

- What transfers are currently in process and where are they coming from?
- What is the value of assets expected to transfer?
- What transfers are completed?
- Where are we in the transfer process overall and on a client by client basis?

Existing Client Data – Consider tracking:

- Total Assets
- Total Net Worth
- Total Liabilities
- Total Managed
- Insurance Information
- RMD Information

Where can I store this information in Junxure?

Now that you've determined what you want to track, the next question is where? Junxure has many areas where you can store data instead of collecting it in a spreadsheet.

For example:

- [Profile Tab](#). Great for storing information that allows you to query your database, including Keywords, Classifications, Interests, and Custodians. Add a keyword of "Prospect-Active" to a prospect record (in addition to a Prospect classification), for example, allows you to create a list of all active prospects in the system.
- [Action Types](#). Consistently entering action types will allow you to track specific events such as scheduled meetings and meetings actually held.

*Helpful Tip:* In an action revolving around meetings, we recommend that you use the action type of "Scheduled Meeting" anytime you are making an appointment and reserve the type of "Meeting" when you actually hold the meeting and record the notes in that action.

- [Action Keywords](#). Track specific actions using action keywords (For

examples, you can track meetings by keyword: MTG-quarterly, MTG-annual, etc.)

- **User Fields.** Customized User Fields let you create fields you need if a specific field isn't already available in Junxure.
- **Taxes & Suitability Tab.** Track tax information and suitability (Investment objectives, Experience, Annual Income, Risk Tolerance, and Liquid Net Worth) information. Did you know that you can archive tax information for each year and quickly retrieve archived information?
- **Opportunities Tab.** Track all expected future money including opportunities for 401k rollovers, new prospects, property sales, inheritances, etc.
- **Action Sequences.** Track and report on specific procedures such as Account Transfers. Use the Action Sequences Sub Tab to view where you are in the process of a specific transfer directly from within any action that is part of an action sequence. You can even move between action steps from this area.
- **Accounts/Assets Tab.** You can either manually enter accounts and managed/non-managed assets on this tab, or you can automatically import managed assets using one of our portfolio management system [interfaces](#) (if available). You can also capture Required Minimum Distribution information in the new RMD tab.

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.

NEXT MONTH: Junxure the Spreadsheet Buster (Part 2): After you capture the data, how do you track it?

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](mailto:training@junxure.com).

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## [Junxure Training Solutions Reminder](#)

### JUNXURE Practice Management Virtual User Group

Topic: Mining Your Database

Date: Friday, June 25, 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.

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 offering practice management suggestions for your office.

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

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## 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](#).

June Online Classes include:

Date(s)	Time	Class
June 8th – 30th	2 PM (ET)	<a href="#">Junxure Basics</a>
June 15th	2 PM (ET)	<a href="#">Scheduling and Tracking Meetings</a>
June 18th	2 PM (ET)	<a href="#">Actions Management and Reporting</a>

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.

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## Junxure in the Field

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

June 2nd – 3rd	<a href="#">Financial Planning Association (FPA) Nor Cal Conference (San Francisco)</a>

June 9th – 11th	<a href="#">Pershing Insite™ 2010 (Hollywood, FL)</a>
June 14th	<a href="#">FPA Illinois Financial Forum 2010 (Oak Brook, IL)</a>
October 1st	<a href="#">Technology Trends for 2010 &amp; Beyond (New York, NY)</a>
October 9th – 12th	<a href="#">FPA Annual Conference (Denver)</a>
October 26th – 29th	<a href="#">Schwab IMPACT® 2010 (Boston)</a>

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



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