

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

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#### [Reminder Actions](#)

- [Don't forget to upgrade MoneyGuidePro Interface](#)
- [Register today - Junxure 8 Essentials Online Class Ends in May](#)

#### [Don't forget to upgrade MoneyGuidePro](#)

Do you use the MoneyGuidePro interface? Beginning May 1, 2010, Junxure customers will not be able export data from Junxure until they have upgraded to the latest version of MoneyGuidePro Interface.

#### For Immediate Action:

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.

For more information about this update, [click here](#).

## [Register today - Junxure 8 Essentials Online Class Ends in May](#)

Time is running out! May is your last chance to register for Junxure 8 Essentials, a web class designed to familiarize you with the new and enhanced features of Junxure Version 8.

Please note: This class is intended for Junxure customers who want additional instructor-led training on the features in Junxure 8. We offer many resources to help you learn more about Junxure 8 features and enhancements on your own, including a recorded educational video on [Junxure 8 features](#) in the [educational video library](#).

The final Junxure 8 Essentials Class is May 24th at 2 PM (ET). Click [here to register](#).












Haven't upgraded to Version 8 yet? Click [here](#) to learn how.

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## [What's New at Junxure](#)

### New Training Videos Now Available

Check out these great new educational videos now available at [www.junxure.com](http://www.junxure.com):

-  [Adding an Opportunity](#): Add opportunities to a contact record.
-  [Opportunity Fields](#): This overview of available fields on the Opportunity Tab can help you determine which fields work best for your firm.
-  [Opportunity Rule Builder](#): Learn how to query your Junxure database for opportunities that meet your specific criteria.
-  [Overview of Contact Record](#): Learn about the elements within a contact record.
-  [Overview of Personal Info Tab](#): Learn more about this tab located within the contact record.
-  [Overview of Documents Tab](#): Learn how you can view, add and edit documents associated with a contact record.
-  [Deliverable Set-up](#): Track recurring actions with variable due dates tied to when the last action was completed.
-  [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.
-  [Add an Entity Record](#): Add an entity contact record for companies,

trusts or other entities.

- ➔ **Modify Contact to an Entity:** Transform existing client contacts into entity contacts.
- ➔ **Junxure Upgrade Wizard:** Junxure 8 users - learn how to perform self updates with the Junxure Upgrade Wizard.

## Top 5 Reasons You Haven't Yet Upgraded to Junxure Version 8

In our continued effort to provide you with the best products and services available, we recently conducted a poll on why some customers haven't yet upgraded to Junxure Version 8.

Here's what you told us:

1. Junxure Version 7 works just fine for us. Change. Kind of scary. Why bother messing with a good thing, right? Well, with every upgrade, we are not only enhancing the tool with new features, we are also improving on previous versions.
2. What's Junxure 8? We know our customers get enough email to clog the New York subway system, which is why we try to keep our email communications to a minimum. Unfortunately, that means you may not be getting our messages. If that's the case - JUNXURE 8 IS NOW AVAILABLE, AND IT'S FAST AND FREE TO UPGRADE!
3. Do I really need all those features? You use Junxure for exactly what you expect in a CRM tool – to store contacts and track appointments. Did you know that Junxure was designed specifically for financial advisors and that many of our enhancements come directly from your suggestions? You helped us design Junxure – why not check out your handiwork?
4. Upgrading is a pain. We know that you need to be up and running without the frustration of speed and data issues. That's why we've taken care to ensure that the upgrade to Junxure 8 is as seamless and painless as possible. You can even perform the upgrade yourself (Think clicking "Next" in a few popups then "Finish"). The process usually takes between 15-30 minutes.
5. I can't find any documentation on Junxure 8's new features. You need to know what you're getting before you upgrade, and we couldn't agree more. [Click here](#) to see what's included in Junxure 8, then watch [this video](#) to learn more.

Why haven't you upgraded yet? Check out this [Version 8 Update Guide](#) to learn how you can upgrade to Junxure 8.

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### ➔ [Client Spotlight](#)

J.J. Burns from J.J. Burns & Company, LLC, Melville NY



Junx•ur•ize [júngkch?r ız] (Noun or Adjective) Definition: To vastly improve one's financial advisory firm through the committed, enthusiastic use of Junxure total firm technology.

Leave it to investment advisor J.J. Burns and his team at J.J. Burns & Company to add new terminology to the financial advisor's vocabulary. Junxure customers since 2006, J.J. now has anywhere between seven to nine employees logging in to the tool daily; they've even dubbed their process of capturing client data and keeping all team members up to date, "Junxurizing."

So, how did they do it?

They Took the Plunge

J.J. spent some time with the Junxure team, specifically Ken Golding, Junxure's Vice President and Chief Developer, and appreciated the rich relationship between Ken's development team and Greg Friedman's wealth management firm, which used Junxure extensively to see what worked and what didn't. The tool had potential to deliver what J.J. envisioned for his own practice.

"The level of employee service that we want to convey is to be better than anyone else," J.J. says of his firm. "The only way to get that level of service is to have such a broad based level of communication electronically, with follow ups, FYIs, actions and to-dos. As the owner of a company, I also need to be able to run productivity reports based on deadlines, time management and thoroughness – these are the main reasons [we bought into] Junxure and we very much committed to it."

They Crowned a Junxure Kingpin

Now that he decided to adopt Junxure firm-wide, J.J. knew he needed to designate a key person who would learn the program from the ground up.

That's where Ricky Bathija, Assistant Portfolio Manager, came in. Ricky was tasked with spearheading the training of the team on their new system, as well as ensuring that no one on the team was lagging behind.

"Ricky was the guy who knew Junxure better than anyone," says J.J. "He steered the course. It was his job to follow up and get everyone learning Junxure. If there was a problem or a team member just didn't understand something, I went to Ricky."

That dedication to getting the team on board earned Ricky the unofficial title of "King Junxure".

They Organized the Intelligence

J.J. and Ricky wasted no time setting up classifications and keywords, noting prospects, clients and even associates such as accountants and attorneys.

"We're much more organized now," Ricky explains. "Every time an employee has contact with a client, it's put into the system and 'Junxurized,' so to speak."

To demonstrate that continuity of communication, J.J. adds, "I'm in my home office right now; going through my nine alerts that I have that my team took care of. I can instantly see that things were done right and now I can do my follow up calls."

In addition to his practice, J.J. is also a highly-respected media resource, appearing regularly in such television programs as "CNBC Power Lunch" and "CNBC Worldwide Exchange" as well as on radio programs and in newspapers and magazines. Junxure helps to organize this element of his business as well, keeping track of media contacts and media blasts that are sent out from his firm.

"Junxure helps us sell the company," he says.

#### They Delivered What They Promised

From the beginning, J.J. was determined to deliver the best level of employee service to his clients. With Junxure, they've been able to achieve that goal.

His latest venture is to "Junxurize" the gift process, noting wedding anniversaries or any occasion for celebration that is meaningful to the client. Just recently, J.J.'s team sent a card to a customer who had been cancer-free for five years.

"I just heard this from Ricky," J.J. notes of a recent client phone call, "The client said, 'Tell J.J. he's not only a fantastic investment advisor, he's a human being, too. Thanks so much for that follow up call.'"

For J.J. Burns, Ricky Bathija and the rest of the team at J.J. Burns & Company, Junxure is far more than just a CRM Tool. It's a practice management tool that enables their team to deliver the best employee service possible.

So now the question remains – have YOU been Junxurized?

Tell us your story! Send an email to [admin@junxure.com](mailto:admin@junxure.com)

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## ➔ Favorite Feature Spotlight

### Junxure Mobile



Stay connected to your Junxure database anywhere, anytime, with Junxure Mobile.

Junxure Mobile delivers secure, real-time, remote access from a web browser or a Smartphone (including BlackBerry, Windows Mobile devices and the iPhone) to the same Junxure database back in your office.

Junxure Mobile is available to Junxure 8 users and delivered as an add-on with an annual license fee.

#### Benefits of Junxure Mobile

- Get it done now. Add new contacts, enter notes, assign follow-up actions to staff and manage their calendars, all in real-time.
- Keep it simple. For advisors who simply need the high-level functionality of Junxure, such as accessing contact records, actions, notes, and alerts, Junxure Mobile may be a great introduction to the program.
- Travel Light. Junxure Mobile users need only a Smartphone or an internet connection to access the interface that includes addresses, phone numbers, e-mail addresses, the client service level, any pending actions for the client, and more.

Junxure Mobile is an add-on to Junxure that is designed to give remote users access to the desktop product. It is not a replacement for the desktop system.

Interested in Junxure Mobile? Attend a [free live demo](#) or contact Junxure Sales for a link to try Junxure Mobile on your own laptop, Blackberry, iPhone, etc.

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

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## Tech Tips

### Restoring a Deleted (Archived) Client

Oops. You accidentally deleted a client by clicking the red “X” button on the contact record. Now what?

First – The record hasn’t been deleted, just archived.

Second – You can restore an archived client by following the procedure below. Be sure to check in advance that you have the proper user rights to restore a contact record. The Key Person in your office should be able to help you if you don’t have the proper rights.

1. Go to the Main Menu > Database Tools > Data Cleanup/Correction.
2. Double click on View Archived Deleted Clients from the column on the right side
3. Highlight the row for the client you wish to restore by clicking anywhere in that row on the grid.
4. From the top menu, click Restore Client.



5. Click Close.

Your client has been restored.

Helpful Hint: You can limit the number of people in your office who can delete contacts by going to Main Menu > System Setup > Setup User Rights > Clients-Buttons > Delete Client and selecting the appropriate security level group for each user.

Note: Junxure 8 customers have the ability to permanently delete all archived records – we highly recommend performing a confirmed local back-up before using this function.

## ➔ Junxure Solutions Group Expert Advice

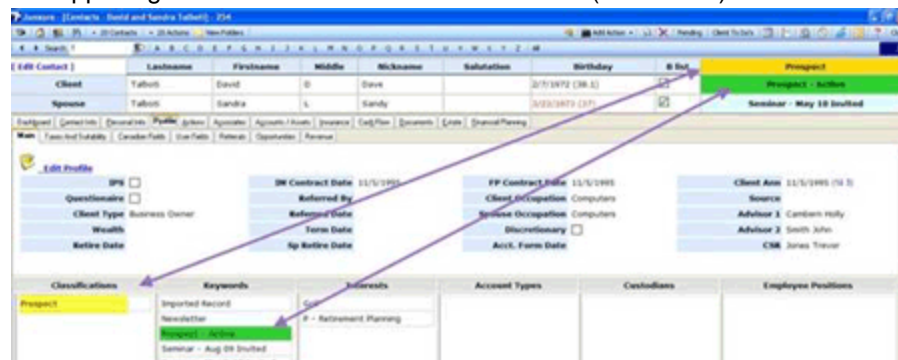
### Tracking Your Prospects

Tracking prospect information is just as important as tracking client data, and many of you have asked us how you can use Junxure to help track opportunities for new business. Whether you want to categorize prospects, note the services a prospect is interested in or capture potential new business leads, Junxure is the perfect tool to record this information and much more.

#### 8 Steps to Begin Tracking Prospects with Junxure:

1. Start by confirming that your prospects have contact records in Junxure. If not, create a record.
2. Make sure to note the Source of each prospect, who referred them (if they were a referral) and the date they were referred.
3. Add the Classification of “Prospect” to each prospect’s contact record. ([Watch a video on classifications and keywords.](#))
4. Add applicable Keywords to categorize your current prospects. ([Show me how.](#)) Keyword suggestions: Prospect-Hot, Prospect-Warm, Prospect-Cold or Prospect-Active.

Tip: You can color code these keywords (in [List Data Maintenance](#)) and give them a high priority (0 = highest priority) so that it will appear in the upper right hand corner of the contact record (see below).



5. Identify in the Interests column what each prospect is interested in. This could include services you provide such as asset management, financial planning, insurance, etc., or financial topics they’re interested in learning more about.
6. Begin tracking potential assets/new business information including projected asset value, probability, projected close date, assigned to, status, etc. using the [Opportunities Tab](#) located at Contact Record > Profile Tab > Opportunities
7. Create reports based on Opportunity information in your contact records.

Two Options:

- a. Print a report specific to one contact from within the [Opportunities tab](#).
- b. Create your own customized rules and reports of all opportunities within your database using the Opportunities Rule Builder (Main Menu > System Setup > Rule Builders > Opportunity Rule Builder) and Opportunity Report Wizard (Main Menu > Reports > Report Wizards > Opportunity Report Wizard)

Tip: Use the Opportunities Dashboard to view a variety of graphs and charts that track such criteria as the Current Status, Projected Revenue, Lead Source and Employee Assigned of your opportunities. (Main Menu > Reports > Business Development > Opportunities Dashboard)

8. Create an Action Sequence to be used each time a new prospect is added to your database, ensuring no important task slips through the cracks. ([Main Menu > System Setup > Action Sequence Setup](#))

Want more? There are two upcoming classes dedicated to showing you how you can track your prospects. We will share more information on these classes as they become available.

#### July Ongoing Education Classes

Date(s)	Time	Class
Friday, July 16, 2010	2 PM (ET)	Tracking Prospects and New Business - Part 1
Friday, July 23, 2010	2 PM (ET)	Tracking Prospects and New Business - Part 2

Can't wait until July? We offer personalized web training that is tailored to meet the needs of your firm. Contact us at 866-586-9873 option 5 or by email at [training@junxure.com](mailto:training@junxure.com) for more information.

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### [Practice Management Virtual User Groups](#)

Topic: Workflow and Systematizing the Office  
Date: May 28, 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](mailto:training@junxure.com) or via phone at 1-866-586-9873, Option 5.

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## Upcoming Junxure Web Classes

Interested in training at your pace? Our web-based curriculum is one of many [training options](#) available to help you recognize the full potential of your Junxure system.

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May Online Classes include:

Date(s)	Time	Class
May 10th - May 27th	2 PM (ET)	<a href="#">Junxure Basics</a>
May 12th	2 PM (ET)	<a href="#">Manage Emails &amp; Appointments in Junxure &amp; Outlook</a>
May 21st	1 PM (ET)	<a href="#">Mining Your Database</a>
May 24th	2 PM (ET)	<a href="#">Junxure 8 Essentials*</a>

*\* Please note: this is the final Junxure 8 Essentials 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.

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## Junxure in the Field

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

June 2nd – 3rd	Financial Planning Association (FPA) Nor Cal Conference (San Francisco)
June 9th – 11th	Pershing Insite™ 2010 (Hollywood, FL)

June 14th	FPA Illinois Financial Forum 2010 (Oak Brook, IL)
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 see you, so please stop by and say hello!



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