

## Junxure to unveil two new versions of its software

Aim is to create a tool more easily customized

By Davis D. Janowski

September 10, 2009

Version 8 of Junxure [customer relationship management](#) software and Junxure Mobile, a separate product that will provide advisers on-the-go access to their CRM database, are slated to be released soon.

Both offerings will be demonstrated next week at the Charles Schwab Corp.'s Impact 2009 conference in San Diego.

“We are just a few weeks away from a general release for both,” said Greg Friedman, founder and president of CRM Software Inc., the maker of Junxure.

At the request of users, the latest version includes a more customizable offering and a new Business Intelligence Dashboard that generates snapshots of key business metrics such as assets, assets per professional and firm revenue.

Also, there is an Opportunities and Business Development dashboard that allows a firm to display almost any field within the database for tracking prospects, improved account tracking and reporting tools, and a new set of required minimum distribution tools.

There have also been additional integrations with other software and services vendors, including ByAllAccounts, [href="http://www.investmentnews.com/20090614/REG/306149968" target="\\_blank">](http://www.investmentnews.com/20090614/REG/306149968)an account-aggregation vendor.

One of the new tools addresses one of the chief complaints that advisers make about Junxure — that it has so many tools.

“At the last minute we decided to add Junxure Checkup. We had really planned on making it a separate product, but decided it would be far more useful from within Junxure 8,” he said.

This tool allows an adviser to generate a report that tells them if they are using 15 areas of the program.

“It doesn't leave you hanging and provides links to our help files and tips on getting the most out of

particular features and color codes the features, red or white, to highlight whether you are using them or not,” said Mr. Friedman, who is also a principal and co-owner of [Salient-Friedman Wealth Management](#) LLC, a firm with \$600 million in assets under management.

Junxure Mobile enables access through a laptop, a BlackBerry or an iPhone.

Mobile will only work with Junxure 8. Those advisers still on [Junxure 7](#) must upgrade if they want to use this feature.

Pricing for the mobile application has not been finalized but would probably be around \$500 per office each year for up to two gigabytes of data transfer per month, said Ken Golding, vice president of CRM Software and one of Junxure's chief developers.

“I've been running this on my phone for about four months now, and we've been beta testing it, and that amount of data traffic we think will be sufficient for most folks,” he said.

Mr. Golding added that pricing for Junxure 8 will remain at \$1,850 for the first year for up to three users and \$350 per year for each additional user.

For more information, visit the [Junxure](#) home page.

---