

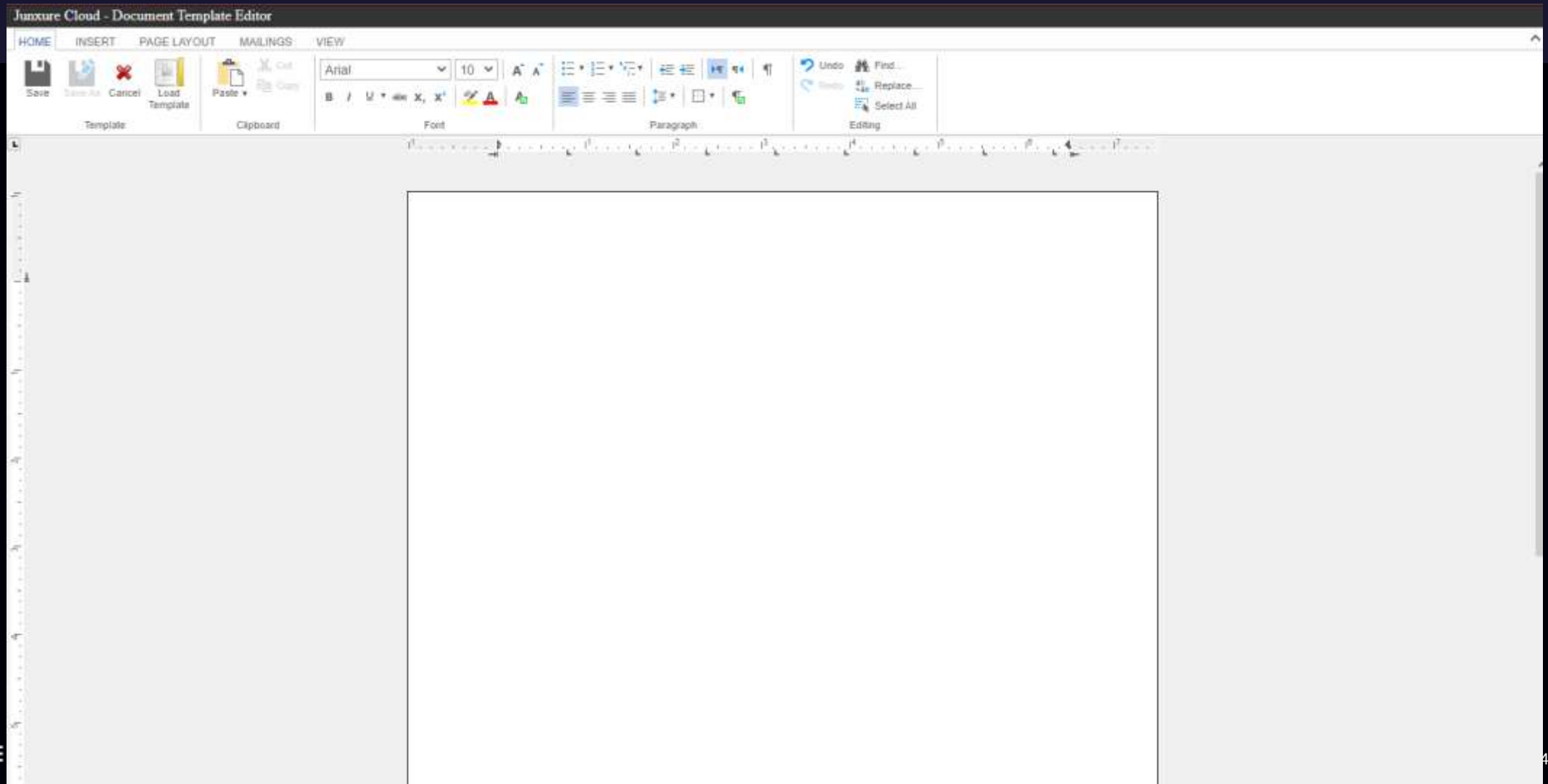
# Save Time with Firm-Customized Correspondence Templates

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Training & Consulting Team

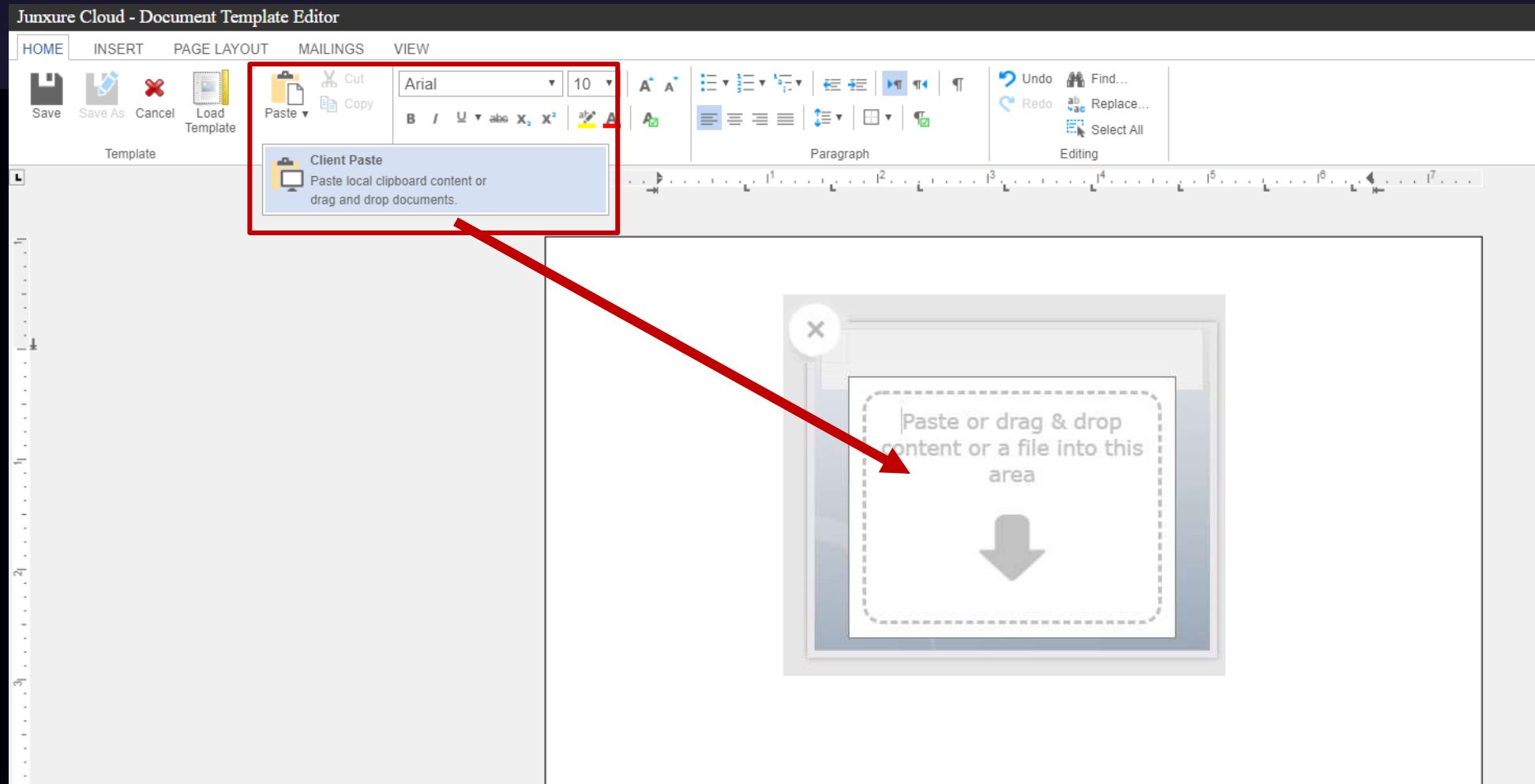
# Today's Agenda:

- ✓ Document Templates
- ✓ Email Templates
  - ✓ Using Exchange
  - ✓ Using M365
- ✓ Correspondence

# Using the Correspondence Editor



# Paste Function is Different



# Use Merge Fields

The screenshot displays the Junxure Cloud - Document Template Editor interface. The top navigation bar includes tabs for HOME, INSERT, PAGE LAYOUT, MAILINGS, and VIEW. The MAILINGS tab is selected and highlighted with a red box. Below the navigation bar, the MAILINGS ribbon contains several icons: Merge Field (highlighted with a red box), Insert Special Field, Delete Field, and Preview Merge Results. A red arrow points from the Merge Field icon in the ribbon to a dropdown menu. The dropdown menu is titled 'Record\_Details' and contains a search bar labeled 'Search for merge fields..'. Below the search bar, a list of merge fields is displayed, including:

- Account\_Review\_Note
- Additional\_Form\_Date
- Address\_Address\_1\_Record
- Address\_Address\_2\_Record
- Address\_Address\_3\_Record
- Address\_City\_Person\_1
- Address\_City\_Person\_2
- Address\_City\_Record
- Address\_Company\_Person\_1
- Address\_Company\_Person\_2
- Address\_Company\_Record
- Address\_Country\_Person\_1
- Address\_Country\_Person\_2
- Address\_Country\_Record
- Address\_Dear\_Person\_1
- Address\_Dear\_Person\_2
- Address\_Dear\_Record
- Address\_Label\_Person\_1
- Address\_Label\_Person\_2
- Address\_Label\_Record
- Address\_Line\_1\_Person\_1
- Address\_Line\_1\_Person\_2
- Address\_Line\_2\_Person\_1

# Sending Email from Junxure/Exchange

Correspondence Assistant - Email

HOME INSERT PAGE LAYOUT MAILINGS VIEW

Cancel Load Template Review Upload Insert Signature Paste Font Paragraph Editing

To: home@net.net

Cc:

Bcc:

Subject:

Attach File Attach from Junxure DM Upload File Attachment size maximum is 25MB

Next

Tricia Cameron  
Portfolio Advisor  
CEO  
Cameron Wealth Management  
growing with you

# Sending Email from Junxure w/Microsoft 365

The screenshot displays the Microsoft Outlook email composition window. The top bar includes 'Send', 'Attach', and 'Discard' buttons. The email header fields are 'To', 'Cc', and 'Add a subject'. The main body of the email contains the contact information for Tricia Cameron, Portfolio Advisor and CEO at Cameron Wealth Management, accompanied by their logo. The bottom of the window features a rich text editor with various formatting tools. A red prohibition sign is overlaid on the 'Send' button in the bottom left corner. On the right side, the 'Junxure for Outlook' sidebar is open, showing a status message 'Template loaded; No template' and a list of templates for selection, including 'Account\_Review\_Note', 'Additional\_Form\_Date', and various 'Address' templates.


Send Attach Discard

To

Cc

Add a subject

Tricia Cameron  
Portfolio Advisor  
CEO

 Cameron Wealth Management  
Growing with You

Discard

Junxure for Outlook

Template loaded; No template

Merge & Send

Search

Account\_Review\_Note

Additional\_Form\_Date

Address\_Address\_1\_Record

Address\_Address\_2\_Record

Address\_Address\_3\_Record

Address\_City\_Person\_1

Address\_City\_Person\_2

Address\_City\_Record

Address\_Company\_Person\_1

Address\_Company\_Person\_2

Address\_Company\_Record

Address\_Country\_Person\_1

Address\_Country\_Person\_2

Address\_Country\_Record

Address\_Dear\_Person\_1

# drive AUSTIN 2022

March 2 — 4, 2022  
Austin Marriott Downtown

<https://events.advisorengine.com>



**THANK YOU**

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