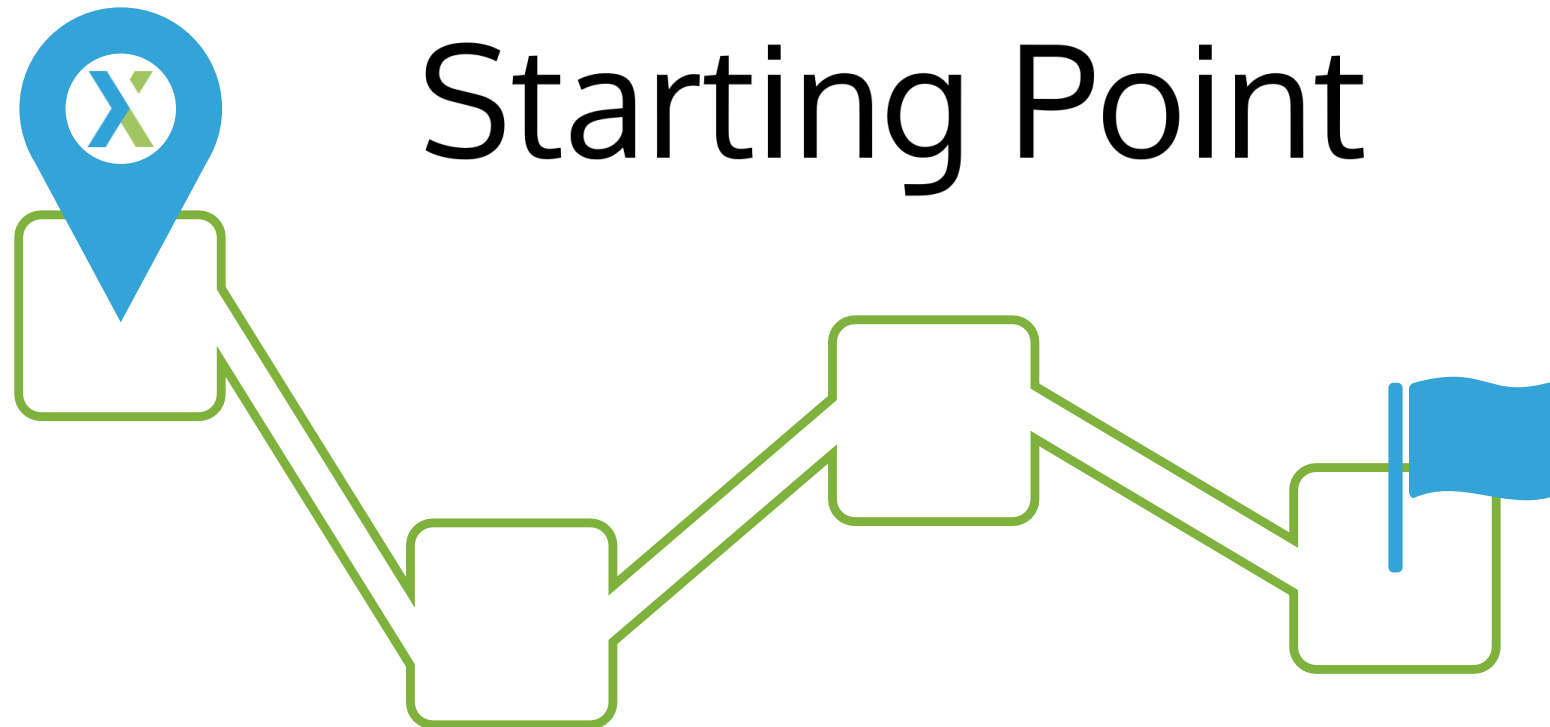


Session 2

Actions Overview



Why Actions?

- Your To Do's
- Phone Conversations
- Notes about a contact
- Email related items
- Meetings notes and follow ups
- Firm related items

“If it's not in Junxure it **didn't happen!**”



Action Fields

Andrews Family Trust

Subject : Short description of the action

[Link To Assets](#) [Documents](#) [Emails](#) [Insurance](#) [Opportunities](#) [User Defined Fields](#) [Calendar](#)

Notes *

← → **Formats** **B** *I* [List Icons] [List Icons] [List Icons] [List Icons]

[List Icons] [List Icons] [List Icons] [List Icons] **A** **A** 12pt [List Icons]

* Any details related to the action

Notes

Task details

Follow-up notes

Entered By * : Haas, John

Date * : 2/15/2019 08:32 AM

Time Spent : [] Minutes

Type * : Note

Category : Select an Option

Tags : Select Tags

Action Required

Assign To : Haas, John

Priority : Select an Option

Start Date : []

Due Date : 2/15/2019

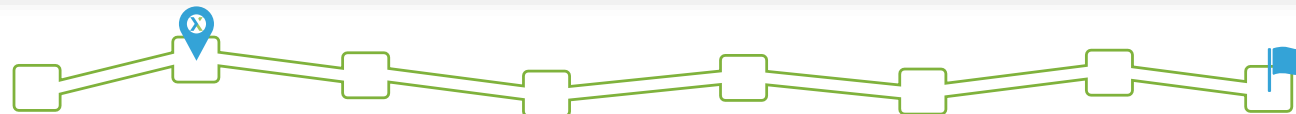
FYI on Save :

Select Group : Select Group to FYI

Viewing : All

- Adv 1
- Adv 2
- CSR
- Cochrane, Julie
- Graeber, Chris
- Haas, John
- Operations, Queue -
- Wenzel, Amber

Cancel Save & Close Save & Add Related



Action Fields

☆ Actions » Record Actions

0 selected

DRAG A COLUMN HEADER AND DROP IT HERE TO GROUP BY THAT COLUMN

			Assigned To	Action Type	Action Subject	Action Note	Due date	Complete
+	⋮	<input type="checkbox"/>	Haas John	Meeting	Meeting Notes - Andrews family	Date: Time: Location: Type of Meeting: Meeting Attendees: Meeting Notes:	2/21/2020	<input type="checkbox"/>
+	⋮	<input type="checkbox"/>	Haas John	Note	IRA Contribution	Date of Contribution: Contributor Name: Custodian: Account #: Amount: \$ Type (regular/catchup or both): Deductible: (Y/N) Year:	2/20/2020	<input type="checkbox"/>
+	⋮	<input type="checkbox"/>	Satterfield Beverly	Note	Recurring Action - Account Rebalance	* Please launch the account rebalance workflow for this record.	2/10/2020	<input type="checkbox"/>
+	⋮	<input type="checkbox"/>	John Haas	Phone	Account Retitling - Receipt Verification	Contact custodian to verify that paperwork has been received and retitling is complete. Do this thing	1/21/2020	<input checked="" type="checkbox"/>
+	⋮	<input type="checkbox"/>	John Haas	Other Activity	Account Retitling - Paperwork	Paperwork received from client in good order? If yes, scan paperwork and supporting documents into document storage system and send to custodian. If no, followup with client and leave as pending action until paperwork is received	1/21/2020	<input checked="" type="checkbox"/>
+	⋮	<input type="checkbox"/>	John Haas	Letter	Account Retitling - Paperwork	Prepare and send paperwork to client for signatures. If unsure of which paperwork and supporting documents to send - contact custodian.	1/21/2020	<input checked="" type="checkbox"/>
+	⋮	<input type="checkbox"/>	Satterfield Beverly	Phone	Birthday Call	Call Client and wish them a Happy Birthday Tell george he is old	1/19/2020	<input type="checkbox"/>
+	⋮	<input type="checkbox"/>	John Haas	Meeting	Meeting notes	Notes	1/8/2020	<input checked="" type="checkbox"/>
+	⋮	<input type="checkbox"/>	Satterfield Beverly	Prep	Meeting Prep - Prep Reports	Prep the reports and pass on to ADV 1	12/29/2019	<input checked="" type="checkbox"/>
+	⋮	<input type="checkbox"/>	Satterfield Beverly	Scheduled Meeting	Meeting Prep - Call to Schedule	Call client and schedule next meeting Date: Time: Location: Attendees: Notes:	1/10/2020	<input checked="" type="checkbox"/>

Action Fields

Entered By *	: Haas, John	▼
Date *	: 2/15/2019	08:32 AM ▼
Time Spent	: <input type="text"/>	Minutes
Type *	: Note	▼
Category	: Select an Option	▼
Tags	: Select Tags	
<input checked="" type="checkbox"/> Action Required		
Assign To	: Haas, John	▼
Priority	: Select an Option	
Start Date	: <input type="text"/>	
Due Date	: 2/15/2019	

FYI on Save	: <input type="checkbox"/>
Select Group	: Select Group to FYI ▼
Viewing	: All ▼
<input type="checkbox"/>	Adv 1
<input type="checkbox"/>	Adv 2
<input type="checkbox"/>	CSR
<input type="checkbox"/>	Cochrane, Julie
<input type="checkbox"/>	Graeber, Chris
<input type="checkbox"/>	Haas, John
<input type="checkbox"/>	Operations, Queue -
<input type="checkbox"/>	Wenzel, Amber



Action Classifiers

Category →

↓ Action Tags

Money Movement	Compliance
ACH	Trade Error
Check – Rcvd.	ADV
Check - Sent	Privacy Policy
Deposit	Complaint
Withdrawal	
IRA Contribution	



Action Quick Search

Quick Info Add Action Add Asset Add Oppty Add Insur. Correspond Reports Add Record Tools Andrews - George & Sally

Don't call home after 6:00pm

☆ Actions » Record Actions

0 selected

DRAG A COLUMN HEADER AND DROP IT HERE TO GROUP BY THAT COLUMN

Quick Search

			Assigned To	Action Type	Action Subject	Action Note	
+	⋮	<input type="checkbox"/>	Haas John	Meeting	Meeting Notes - Andrews family	Date: Time: Location: Type of Meeting: Meeting Attendees: Meeting Notes:	2/21/2020 <input type="checkbox"/>
+	⋮	<input type="checkbox"/>	Haas John	Note	IRA Contribution	Date of Contribution: Contributor Name: Custodian: Account #: Amount: \$ Type (regular/catchup or both): Deductible: (Y/N) Year:	2/20/2020 <input type="checkbox"/>
+	⋮	<input type="checkbox"/>	Satterfield Beverly	Note	Recurring Action - Account Rebalance	* Please launch the account rebalance workflow for this record.	2/10/2020 <input type="checkbox"/>
+	⋮	<input type="checkbox"/>	John Haas	Phone	Account Retitling - Receipt Verification	Contact custodian to verify that paperwork has been received and retitling is complete. Do this thing	1/21/2020 <input checked="" type="checkbox"/>
+	⋮	<input type="checkbox"/>	John Haas	Other Activity	Account Retitling - Paperwork	Paperwork received from client in good order? If yes, scan paperwork and supporting documents into document storage system and send to custodian. If no, followup with	1/21/2020 <input checked="" type="checkbox"/>



Action Quick Search

Quick Search

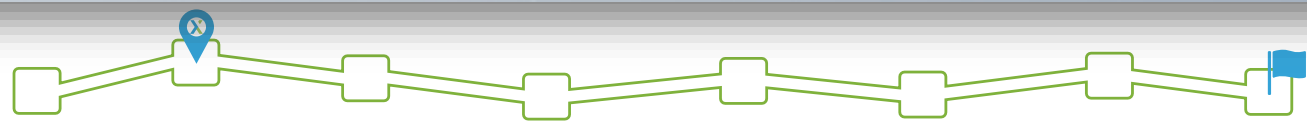
Load Saved Search: Save this Search:

[Delete Saved Search](#)

ActionType:	ActionCategory:	ActionTag:
<input type="checkbox"/> Completion step	<input type="checkbox"/> Billing	<input type="checkbox"/> 401k
<input type="checkbox"/> Email	<input type="checkbox"/> Business Development	<input type="checkbox"/> 457
<input type="checkbox"/> Fax	<input type="checkbox"/> Client Service	<input type="checkbox"/> 529
<input type="checkbox"/> Letter	<input type="checkbox"/> ClientView Message	<input type="checkbox"/> ACH
<input type="checkbox"/> Meeting	<input type="checkbox"/> Compliance	<input type="checkbox"/> Address Change

Date Entered	Date Due	Date Completed	Master Action Subject
<input type="text" value="Is equal to"/>	<input type="text" value="Is equal to"/>	<input type="text" value="Is equal to"/>	<input type="text" value="Contains"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[Apply Results](#)



Life Cycle of an Action Tracking the Story



Where do I go to add another action?

Start a new story

Quick Info **Add Action** Add Asset Add Oppty Add Insur. Correspond Reports Add Record Tools Move / Copy Andrews - George & Sally

[8] more Tags(s)

Actions » Record Actions Show All Expand All Expand All Collapse All Note Width: Default Full

« Return to List

Summary

IRA Contribution

Linked Items

- Assets
- Documents
- Emails
- Insurance
- Opportunities

Status: Incomplete **Assigned :** Haas, John **Type:** Note **ID:** 9047

Subject : IRA Contribution

Notes:
Date of Contribution: 3/4/20
Contributor Name: Sally
Custodian: Schwab
Account #: 1234-5678
Amount: \$ 1500.00
Type (regular/catchup or both): Regular
Deductible: (Y/N) Year: 2020

Entered By : Haas, John
Created : 02/20/2020 4:52 PM
Time Spent : Minutes

Type : Note
Category : Money Movement

Assigned : Haas, John
Priority : Medium
Start Date :
Due Date : 03/06/2020

Assignee:
Haas, John

Continue the story



Ensure your success
by finishing this
series!

Next Session:
System Setup

Starting Point

