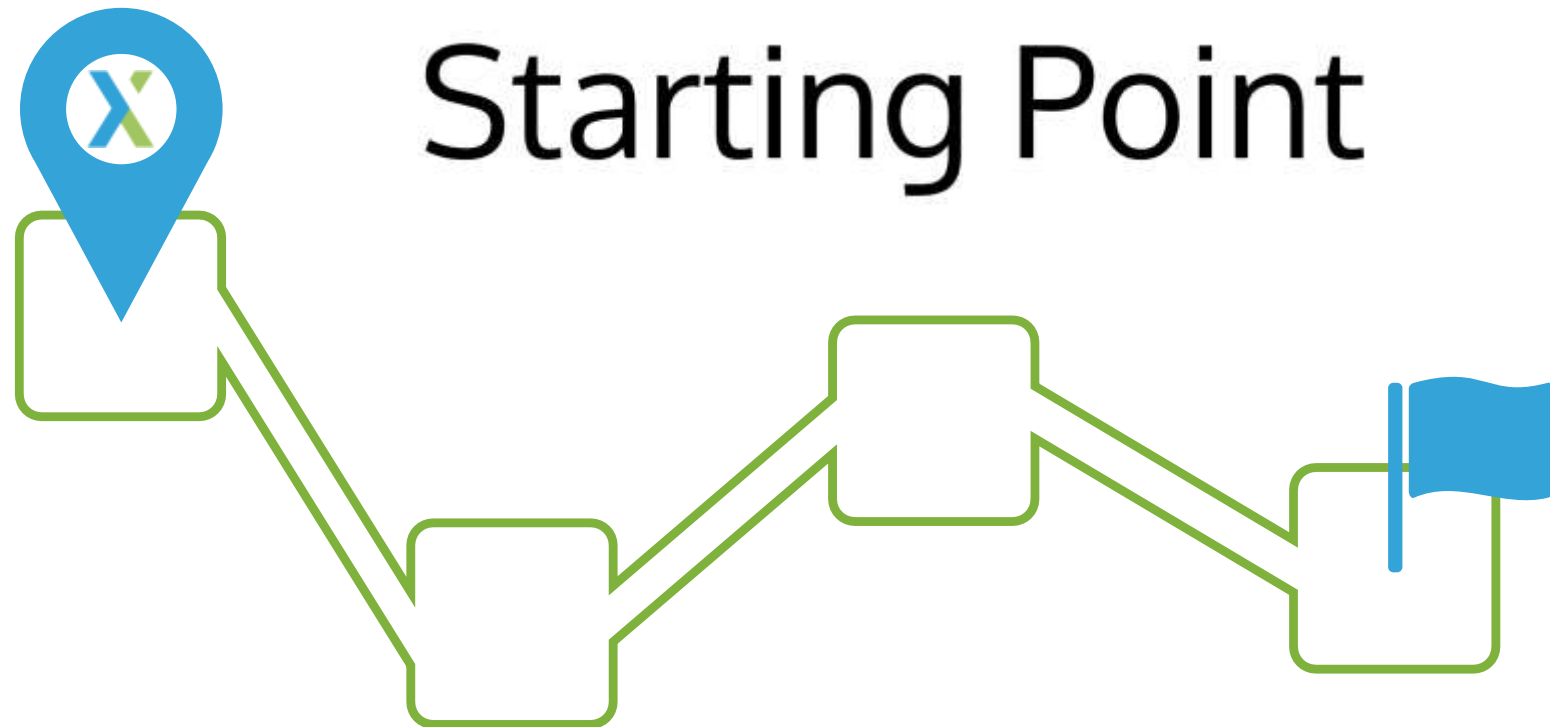


Session 5A

Managing Emails in Junxure (Exchange)





Today's Topics

- Email Integration - The What and the Why
- The Junxure Outlook Add-in
 - Email
 - Calendar
- Sending an Email from Junxure

The What and the Why

“Capture”





The What and the Why



Junxure/Outlook Add-in



Conditions to be Met

Andrews - George and Sally

[+ Edit Record](#)

Record ID: 2
Service Level: Platinum

Advisor 1: Haas, John
Advisor 2: Graeber, Chris
CSR: Wenzel, Amber

Home Phone: (555) 666-7878
George Home: bubandrews@gmail.com

Address: 25 Andrews Drive
Oaks, CA 94555 USA

No Mail

George (Bub) Andrews

Nickname: Bub
DOB: 2/26/1940 Age: 77.9

Home Phone: (555) 666-7878
George Work: gandrews@andrewstools.com

Address: 1050 Northgate Drive
Suite 570
Santa Barbara, CA 94955 USA

Sally Andrews

Nickname: Sal
DOB: 7/15/1938 Age: 79.5

Sally Cell: (555) 780-7687
Sally Home: sally@email.net

Address: 47865 Bay View Terrace
Honolulu, HI 96846 USA

Classifications: [Center of Influence, Client](#)

Tags: ABC Event - Invited, Client-Platinum, Estate Planning, Financial Planning, Holiday Gift
[\[6\] more Tags\(s\)](#)

ALERT:
Don't call home after 7:00pm

★ Profile » Contact Info » **Email Addresses**

Type	Email	Label	Belongs To	Primary	Add'l
Home	bubandrews@gmail.com	George Home	Andrews - George and Sally	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Business	gandrews@andrewstools.com	George Work	Andrews, George (Bub)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Home	sally@email.net	Sally Home	Andrews, Sally	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Business	Sally@professional.net	Sally Work	Andrews, Sally	<input type="checkbox"/>	<input type="checkbox"/>
Business 2	Rlawer@net.net	Sallys Attorney	Andrews, Sally	<input type="checkbox"/>	<input checked="" type="checkbox"/>

← Client or Email



The Outlook Add-in

Search Current Mailbox Current Mailbox

All Unread By Date ↑

Junxure Email Tools ⬆

| jhaas@junxure.com | | | 64 |

Action ID N/A | --- | Manage JUNXURE CLOUD

JX16289... ! @	From	Subject	Received	
▼ Older				
	John Haas	Email with attachment	Mon 7/22/2019 1:...	
8,368	John Haas	How are things?	Thu 6/6/2019 9:26...	
	George Andre...	Too Funny!	Fri 3/8/2019 9:50 ...	
9,043	Lizzie Reyna	Re: College Planning for my Niece	Fri 3/8/2019 9:44 ...	
7,750	Lizzie Reyna	Re: College Planning for my Niece	Fri 3/8/2019 9:33 ...	
7,750	Lizzie Reyna	College Planning for my Niece	Fri 3/8/2019 9:31 ...	
9,042	George Andre...	New Baby!	Wed 3/6/2019 2:3...	
9,041	George Andre...	Meeting Questions	Wed 3/6/2019 2:3...	



Manual Capture

Junxure Email Tools

bubandrews@gmail.com

Action ID N/A | Manage

JUNXURE CLOUD

Manual Email Import

Client Search

Last Name Search: Andrews

ID	Last Name	First Name	Middle
2	Andrews	George (Bub)	H
1	Andrews	Jeff	
2	Andrews	Sally	A

Email To Import

Received From: bubandrews@gmail.com

Hi John,

I have a few questions about our upcoming meeting. Can you give me a call so we can go over those before the meeting. I am available today anytime between Noon and 2pm and all day tomorrow.

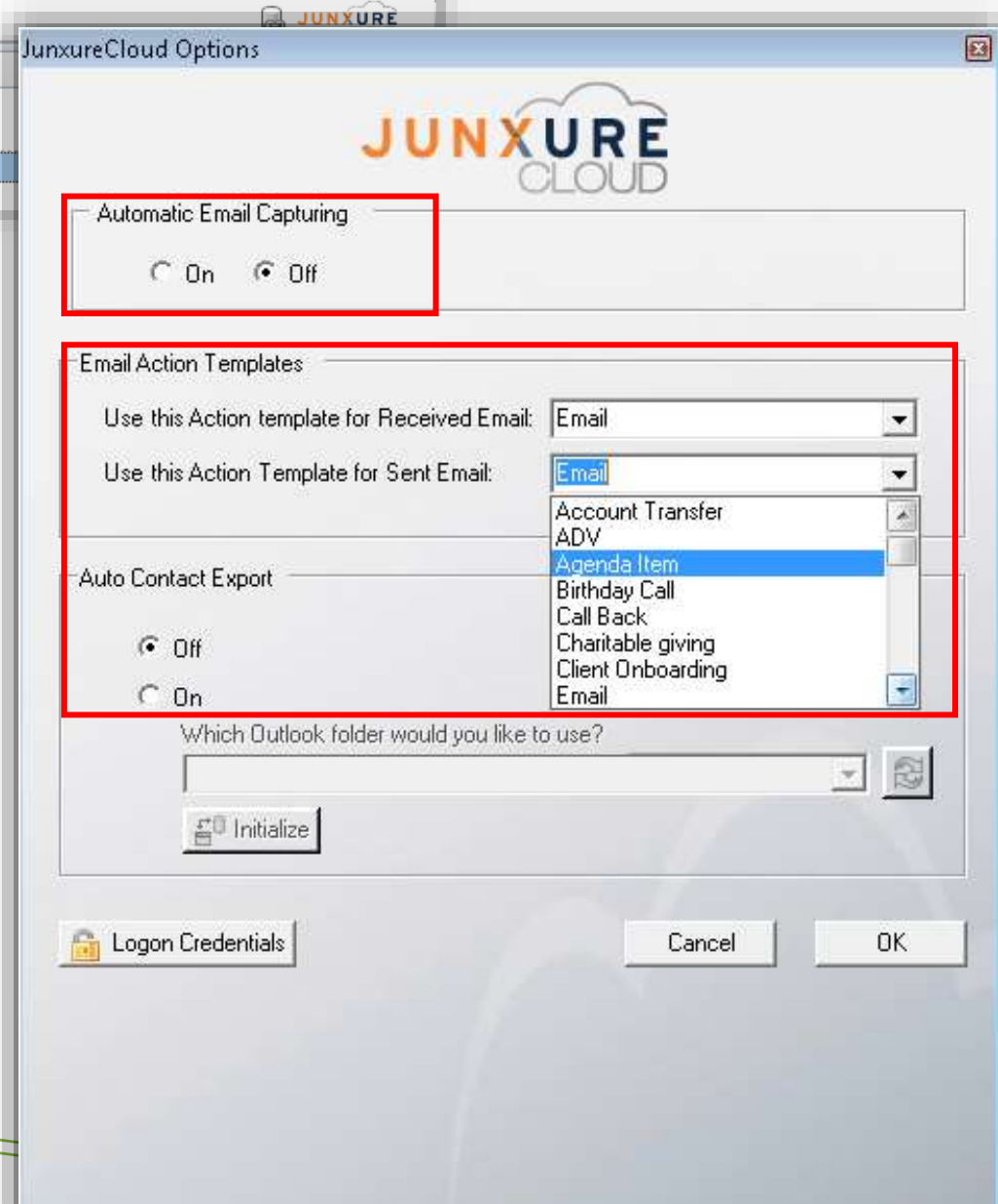
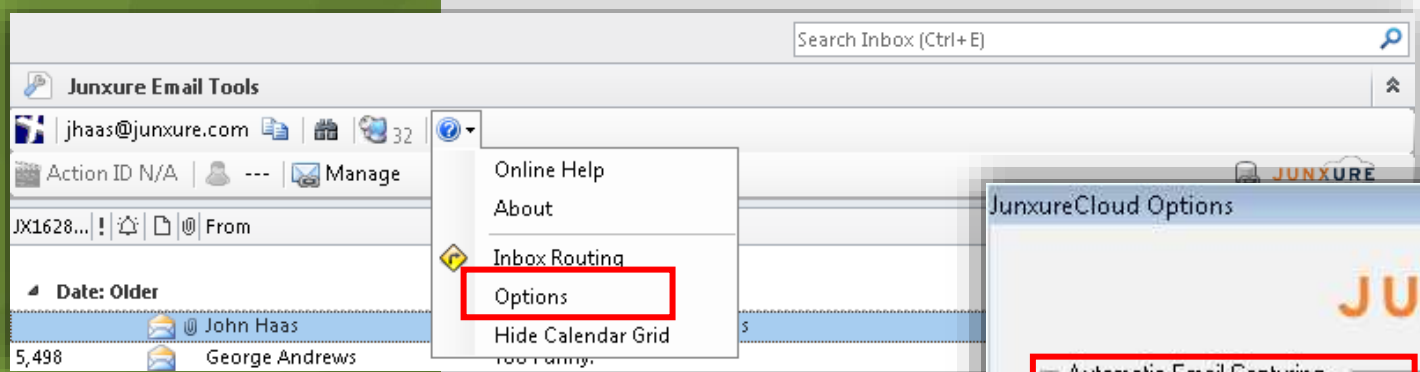
Thanks,

George

Selected Client: Andrews, George (Bub)

Cancel Import

Options



Will I get a Pending Action?

[Back to Workflow List](#) Be sure to click Save Template to keep your changes [X Delete Template](#)

Workflow Setup and Edit

Workflow Category* Status* Last Edited By
Workflow Name* Owner Last Review
Workflow Description/Trigger First Step completes automatically on add

Assigned <Employee Creating Action> Type: Email

Subject

Notes:

Type* FYI on Save [?](#)
Category Select Group
Tags Viewing

Action Required

Assigned*

Priority

Days Until Due

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



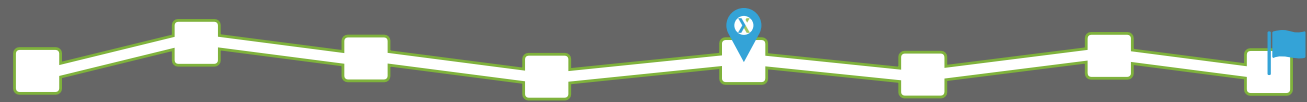
Navigation Tools!

Junxure Email Tools

lizzie.reyna@gmail.com | 32 | Manage

Action ID 1805 | Reyna - Ernest and Elizabeth (16)

From	Subject	Received	Size	Categories
John Haas	Email Attachment Questions	Tue 12/20/2016 9...	1 MB	
George Andrews	Too Funny!	Tue 7/5/2016 5:2...	12 KB	
Lizzie Reyna	Re: College planning for my Niece	Tue 7/5/2016 5:1...	20 KB	
Lizzie Reyna	Re: College planning for my Niece	Tue 7/5/2016 5:1...	16 KB	



Level 201 – Managing Emails

The screenshot displays the Junxure Email Tools interface. At the top, there is a search bar for the inbox. Below it, the user's email address (lizzie.reyna@gmail.com) and account information are shown. A red box highlights the 'Manage' button in the top navigation bar. The main area shows an email list with columns for 'From', 'Subject', 'Received', and 'Size'. The selected email is from Lizzie Reyna with the subject 'Re: College planning for my Niece'. The right-hand pane shows the content of this email, including the subject line, sender information, and the body text.

Re: College planning for my Niece
Lizzie Reyna <lizzie.reyna@gmail.com>
Sent: Tue 7/5/2016 5:18 PM
To: John Haas

I hear that mortgage rates are getting pretty low, is it worth it for Ernie and I to refinance? Please discuss.

Thanks,

Liz

On Tue, Jul 5, 2016 at 5:17 PM, Lizzie Reyna <lizzie.reyna@gmail.com> wrote:
Oh Yes, 529 plans it was...all of the numbers can get complicated. I can meet any day except Thursday or Friday next week. My schedule availability look like?

Liz

On Tue, Jul 5, 2016 at 5:16 PM, John Haas <jhaas1721@gmail.com> wrote:
Hi Liz,

I think you may have read about the 529 plans, a great college savings option. Why don't we schedule a meeting we can discuss all options further. Sound good?

Level 201 – Managing Emails

The screenshot displays the Junxure Email Tools interface. At the top, there is a search bar labeled "Search Inbox (Ctrl+E)". Below it, the user's email address "lizzie.reyna@gmail.com" and a "Manage" button are visible. The main area shows a list of emails with columns for "From", "Subject", "Received", "Size", and "Categori...". A dialog box titled "Manage Emails - Client Action ID 1805" is open in the foreground. It contains a "Preview" section with the email content and a "Related Emails" section with a table of linked emails. At the bottom of the dialog, there are three radio button options: "Remove from action", "Move To New Action", and "Move To This Existing Action" (which is selected). The "Move To This Existing Action" option has a text input field next to it. The "View" button is also visible at the bottom left of the dialog.

Re: College planning for my Niece
Lizzie Reyna <lizzie.reyna@gmail.com>
Sent: Tue 7/5/2016 5:18 PM
To: John Haas

I hear that mortgage rates are getting pretty low, do you think that it's worth it for Ernie and I to refinance? Please call me so we can discuss. Thanks, Liz On Tue, Jul 5, 2016 at 5:17 PM, Lizzie Reyna wrote: Oh Yes, 529 plans it was...all of the numbers can get confusing! I can meet any day except Thursday or Friday next week as we always leave Thursday mornings for long weekends at the cabin. What does your schedule availability look like? Liz On Tue, Jul 5, 2016 at 5:16 PM, John Haas wrote: Hi Liz, I think you may have read about the 529 plans, and they can definitely be a good college savings option. Why don't we schedule time for you to come in and we can discuss all options further. Sound

Manage Emails - Client Action ID 1805

Preview

Received From: lizzie.reyna@gmail.com
Re: College planning for my Niece

Related Emails

Found 4 Emails That Are Linked To This Action

Select	ClientName	Imported	FromAddress	Subject	ToAddress	InFolder
<input type="checkbox"/>	Reyna - Ernest a...	07/05/2016	lizzie.reyna@gm...	Re: College plan...	jhaas1721@gm...	Inbox
<input type="checkbox"/>	Reyna - Ernest a...	07/05/2016	lizzie.reyna@gm...	College planning...	jhaas1721@gm...	Inbox
<input checked="" type="checkbox"/>	Reyna - Ernest a...	07/05/2016	lizzie.reyna@gm...	Re: College plan...	jhaas1721@gm...	Inbox
<input type="checkbox"/>	Reyna - Ernest a...	07/05/2016	jhaas1721@gm...	RE: College plan...	lizzie.reyna@gm...	SentItems

What operation would you like to do with the selected emails?

Remove from action Move To New Action Move To This Existing Action

View Select the emails you want to move then select what operation you want to do... Go Cancel

Calendar – From Junxure To Outlook

Status: Incomplete **Assigned :** Haas, John **Type:** Meeting **ID:** 8351

Subject : Meeting Notes

Lin Assets Documents Emails Insurance
ked Opportunities User Defined Fields Calendar
: (1)

Notes:*

I *B* *I* **Formats** **B** *I*

Date: 9/23/19
Time: 2:00pm
Location: Meeting Room 1
Type of Meeting: Annual Review
Meeting Attendees: Advisor, Client, and CSR
Meeting Notes:

Entered By* : Haas, John
Created* : 08/21/2019 4:40 PM
Type* : Meeting
Category : Meetings
Tags : Select Some Options

Action Required

Assigned* : Haas, John
Priority : Select an...
Due Date* : 09/23/2019

Completed

FYI on Save : **i**
Select Group : Select Group to FYI
Viewing : All

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



Calendar – From Junxure To Outlook

Status: Incomplete **Assigned :** Haas, John **Type:** Meeting **ID:** 8351

Subject : Meeting Notes

Lin Assets Documents Emails Insurance
ked Opportunities User Defined Fields Calendar
: (1)

Notes:*

I *B* *I* Formats


Date: 9/23/19
Time: 2:00pm
Location: Meeting Room 1
Type of Meeting: Annual Review
Meeting Attendees: Advisor, Client, and CSR
Meeting Notes:

Entered By* : Haas, John
Created* : 08/21/2019 4:40
Type* : Meeting
Category : Meetings
Tags : Select Some Option

Action Required
Assigned* : Haas, John
Priority : Select an...
Due Date* : 09/23/2019

Completed

Appointment

Critchfield - Brad & Andrea 

Title
Meeting Notes

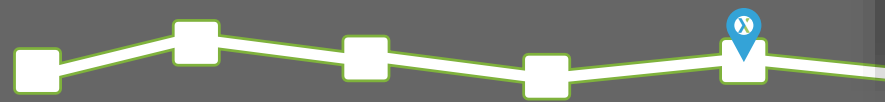
Location

Description
Date: 9/23/19 Time: 2:00pm Location: Meeting Room 1
Type of Meeting: Annual Review Meeting Attendees:

Start
9/23/2019 9:30 PM

End
9/23/2019 10:30 PM

All day Recurring



Sending Email from Junxure

Actions Overview

Summary

Service Monitor - Special Interest Article

Linked Items

- Assets
- Documents
- Emails
- Insurance
- Opportunities

Show All Expand All Expand All Collapse All Note Width: Default Full

Status: Complete Assigned: Satterfield, Beverly Type: Service Monitor ID: 8938

Subject: Service Monitor - Special Interest Article

Linked: Assets Documents Emails Insurance Opportunities User Defined Fields Calendar

Notes:

Send them an email or article that they might be interested in

*** When this task is completed, make sure you complete the pending service monitor item!

Entered By: Haas, John

Created: 01/06/2020 2:53 PM

Time Spent: Minutes

Type: Service Monitor

Category: Client Service

Tags: Select Some Options

FYI on Save: FYI

Select Group: Select Group to FYI

Viewing: All

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

Service Monitor:

- Client Event | Due: 08/08/20
- Client Meeting | Due: 01/22/20
- Client Touch | Due: 03/21/20
- Lunch Date | Due: 02/26/21
- Special Interest | Due: 05/13/20
- Article/Email

Cancel Save



Sending Email from Junxure

Andrews - George and Sally

+ Edit Record

Record Service
Advisor
Advisor
CSR
Home
Home
Mailing
Address

Correspondence Assistant - Email

HOME INSERT PAGE LAYOUT MAILINGS VIEW

Cancel Load Template Review Upload Insert Signature Paste * Copy

Document Recipients Email Signature Clipboard

Arial 12 A+ A-

Font Paragraph

Undo Find... Replace... Select All Editing

To: home@net.net


Next Cc:

Bcc:

Subject:

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

Tricia Cameron
Portfolio Advisor
CEO

 Cameron Wealth Management
Partnering with You



Sending Email from Junxure

Add Action to Records Using: Email Default

Create Recipient List Email - 9-14-2020 *Recipient List/History Name*

Folders

- All Record Documents
 - Account Forms
 - Asset Statements
 - Attachments
 - Compliance
 - Contracts
 - Correspondence
 - Documents
 - Email**
 - Estate Documents
 - 2020
 - Financial Planning
 - Inbox

Description
Correspondence Email

Created By
Cameron, Tricia

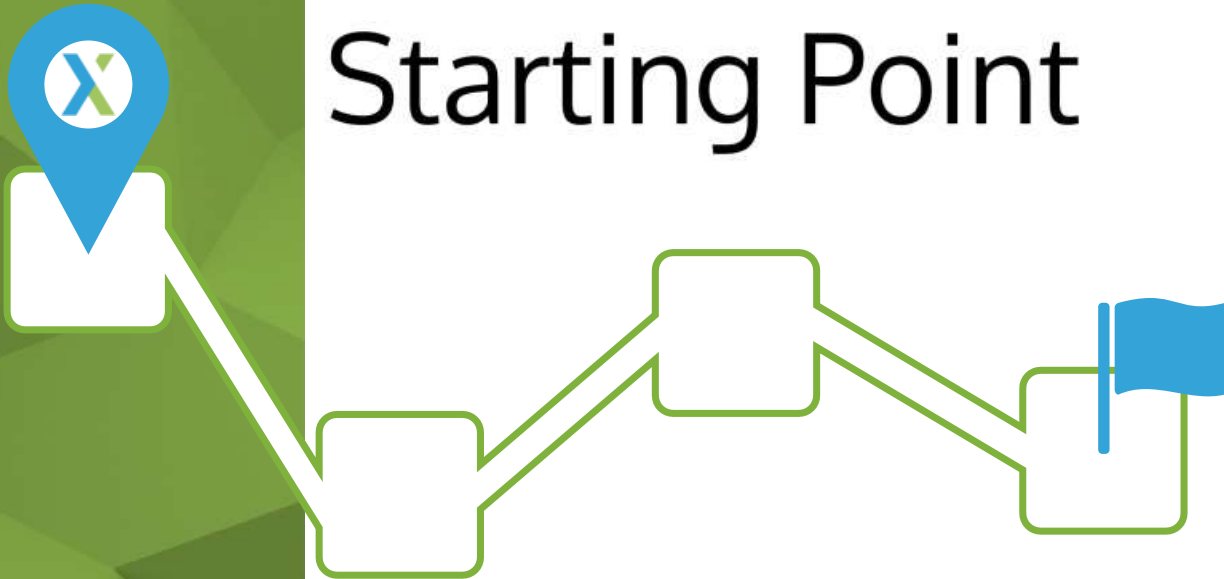
Type
Email

Tags
-Select Tags-



Ensure your success
by finishing this
series!

Starting Point



Next Session:
**Workflow
Tools**

