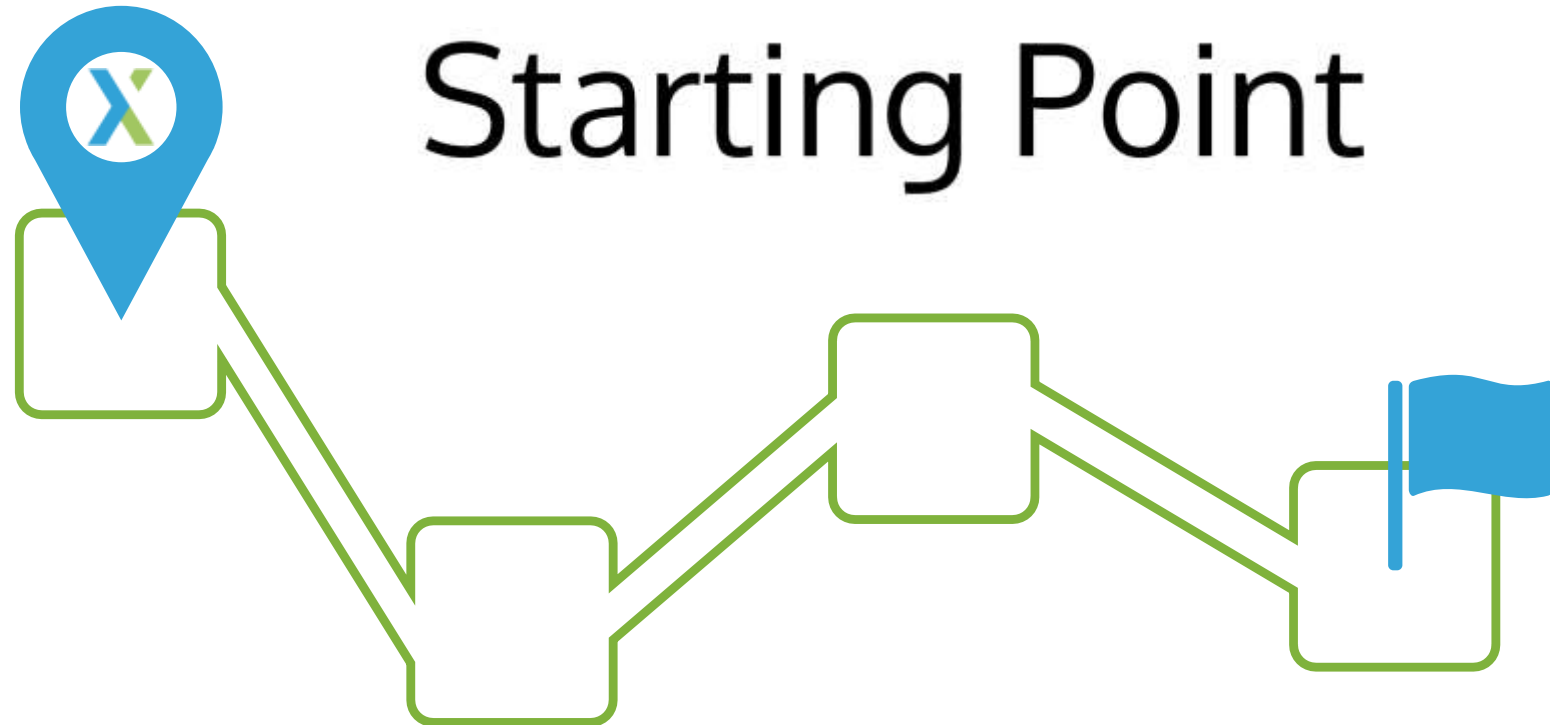


# Session 7

## Documents and Correspondence



# Today's Topics



## The Document Workspace

Interacting with Documents  
Creating Folders



## Correspondence Templates



## Creating Mass Emails



## Correspondence Assistant

Letters  
Labels



# Junxure – Your Document Storage Center

The screenshot displays the Junxure web application interface. At the top, the breadcrumb navigation shows 'Junxure > Haas Financial > RECORD DETAILS'. The user's name 'johnhaas110@g' is visible in the top right corner. A navigation sidebar on the left includes sections for 'Quick Links', 'Record Nav', 'Records', 'Actions', 'Oppty', 'Assets', 'Insurance', 'Dashboards', 'Report Asst', 'Email Mgt.', 'Correspond', 'Documents', 'Workflow', 'Integrations', 'Settings', 'Import', and 'Calendar'. The 'Documents' section is expanded, and 'Junxure Documents' is highlighted. The main content area is titled 'Andrews - George & Sally' and features a yellow alert banner: 'ALERT: Don't call home after 6:00pm'. Below the alert, there are buttons for '+ Create Document' and '+ Upload Document'. A table lists documents with columns for Commands, FileName, Description, Type, Created, Folder, and Modified. A red box highlights the 'Folders' sidebar and the document table.

Commands	FileName	Description	Type	Created	Folder	Modified
⋮	Welcome Letter.doc	Client Welcome Letter	Letter	10/27/2013	Correspondence	7/25/2013
⋮	Sally Andrews Will.pdf	Sally's Will	PDF	10/27/2013	Estate Documents	3/5/2015
⋮	Account Questionnaire.doc	Account Questionnaire	Letter	10/27/2013	Account Forms	10/27/2013
⋮	Account Signup.doc	Account Transfer Cover Letter	Letter	10/27/2013	Contracts	10/27/2013
⋮	Email - 4/15/2015	Email - 4/15/2015	Email	4/14/2015	Account Forms	4/14/2015
⋮	Letter - 4/15/2015	Letter - 4/15/2015	Letter	4/15/2015	Account Forms	4/15/2015
⋮	Johns Referral Letter.doc	Johns referral Letter	Letter	5/4/2015	Correspondence	11/1/2015
⋮	Golf Email - 6/24/2015	Golf Email - 6/24/2015	Email	6/23/2015	Account Forms	6/23/2015
⋮	Email - Market Turmoil?	Email - Market Turmoil?	Email	8/23/2015	Account Forms	8/23/2015
⋮	sally.png	Sallys picture.	PDF	8/26/2015	Miscellaneous	8/26/2015

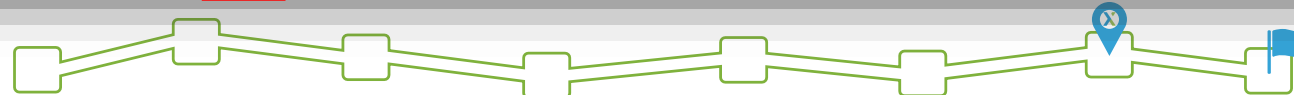


# Interacting with Documents

The screenshot displays the Junxure interface for a record titled "Andrews - George & Sally". A yellow alert banner at the top states: "ALERT: Don't call home after 6:00pm". Below this, the "Documents" section is active, showing a tree view of folders on the left and a list of documents in the center. A red box highlights the "Commands" column in the document list, which contains vertical ellipsis icons. A blue callout box points to these icons with the following actions:

- Edit File Properties
- Edit Document Online
- Download File
- Delete File

Type	Created	Folder	Modified
Letter	10/27/2013	Correspondence	7/25/2013
PDF	10/27/2013	Estate Documents	3/5/2013
Letter	10/27/2013	Account Forms	10/27/2013
Letter	10/27/2013	Contracts	10/27/2013
Email	4/14/2015	Account Forms	4/14/2015
Letter	4/15/2015	Account Forms	4/15/2015
Letter	5/4/2015	Correspondence	11/1/2015
Email	6/23/2015	Account Forms	6/23/2015
Email	8/23/2015	Account Forms	8/23/2015
PDF	8/26/2015	Miscellaneous	8/26/2015



# Adding/Uploading Documents

The screenshot displays the Junxure software interface for a record titled "Andrews - George & Sally". The top navigation bar includes "Quick Links" and "Record Nav" on the left, and a toolbar with icons for "Quick Info", "Add Action", "Add Asset", "Add Oppty", "Add Insur.", "Correspond", "Reports", "Add Record", and "Tools" on the right. A yellow alert banner reads "ALERT: Don't call home after 6:00pm". Below this, the "Documents" section is active, showing a "Folders" tree on the left with "Junxure Documents" selected. In the center, a table lists documents with columns for Commands, FileName, Description, Type, Created, Folder, and Modified. Two buttons, "+ Create Document" and "+ Upload Document", are highlighted with a red box above the table. The table contains the following data:

Commands	FileName	Description	Type	Created	Folder	Modified
⋮	Welcome Letter.doc	Client Welcome Letter	Letter	10/27/2013	Correspondence	7/25/2013
⋮	Sally Andrews Will.pdf	Sally's Will	PDF	10/27/2013	Estate Documents	3/5/2015
⋮	Account Questionnaire.doc	Account Questionnaire	Letter	10/27/2013	Account Forms	10/27/2013
⋮	Account Signup.doc	Account Transfer Cover Letter	Letter	10/27/2013	Contracts	10/27/2013
⋮	Email - 4/15/2015	Email - 4/15/2015	Email	4/14/2015	Account Forms	4/14/2015
⋮	Letter - 4/15/2015	Letter - 4/15/2015	Letter	4/15/2015	Account Forms	4/15/2015
⋮	Johns Referral Letter.doc	Johns referral Letter	Letter	5/4/2015	Correspondence	11/1/2015
⋮	Golf Email - 6/24/2015	Golf Email - 6/24/2015	Email	6/23/2015	Account Forms	6/23/2015
⋮	Email - Market Turmoil?	Email - Market Turmoil?	Email	8/23/2015	Account Forms	8/23/2015
⋮	sally.png	Sallys picture.	PDF	8/26/2015	Miscellaneous	8/26/2015





# Adding/Uploading Documents

The screenshot displays the Junxure software interface for a record titled "Andrews - George & Sally". The interface includes a sidebar with navigation options like "Quick Links", "Record Nav", and "Records". The main content area shows a document management interface with a "Folders" tree on the left and a "Documents" list on the right. A modal window is open for adding a new document, featuring a "Folders" list, a "Description" text area, a "Created By" dropdown menu (set to "Haas, John"), a "Type" dropdown menu (set to "Email"), and a "Tags" dropdown menu (set to "-Select Tags-"). The modal also includes "Add New Folder" and "Select File" buttons, and "Cancel" and "Save & Close" buttons at the bottom.

Junxure : Haas Financial : RECORD DETAILS

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

+ Andrews - George & Sally

ALERT: Don't call home after 6:00pm

Documents » Junxure Documents

Folders

- All Record Documents
- Account Forms
- All Tax Forms
- Asset Statements
- Attachments
- Contracts
- Correspondence
- Email
- Estate Documents
- Financial Planning
- Insurance
- Johns Folder
- Miscellaneous
- Notes
- Reports
- Sent Items
- Tax Forms

+ Create Document

Commands Filter

All Record Documents

- Account Forms
- All Tax Forms
  - 2014
  - 2015
- Asset Statements
- Attachments
- Contracts
- 2017
- Correspondence
- Email
- Estate Documents

Add files by clicking the Upload File button. File size maximum is 25MB

Description

Created By

Haas, John

Type

Email

Tags

-Select Tags-

Cancel Save & Close



# Drag and Drop!

Andrews - George & Sally

Advisor 1: Haas, John | Advisor 2: Graeber, Chris | CSR: Satterfield, Beverly

ALERT: Don't call home after 6:00pm

Documents » Junxure Documents

Folders

- All Record Documents
  - Account Forms
  - All Tax Forms
  - Asset Statements
  - Attachments
  - Contracts
  - Correspondence
  - Email
  - Estate Documents
  - Financial Planning
  - Insurance
  - Johns Folder
  - Miscellaneous
  - Notes
  - Reports
  - Sent Items
  - Tax Forms

Filter by tag...

Filter(s) Applied: Folder: All Tax Forms

+Create Document +Upload Document

DRAG A COLUMN HEADER AND DROP IT HERE

Commands	FileName	Description
No records to display.		

Drop files

Move

Documents to upload

- Andrews Family 2019 Tax Return
- Andrews Tools 2019 Tax Return
- Asset Allocation - Andrews

3 items 2 items selected 80.2 KB

# Global folders and sub-folders

The screenshot shows the Junxure software interface for 'Haas Financial' in 'LIST MAINTENANCE' mode. A sidebar on the left contains a navigation menu with 'List Maintenance' highlighted. The main content area displays a list of folders and sub-folders. A red box highlights a green plus sign icon in the toolbar, which is used to create new sub-folders. Below the toolbar, a table lists the following items:

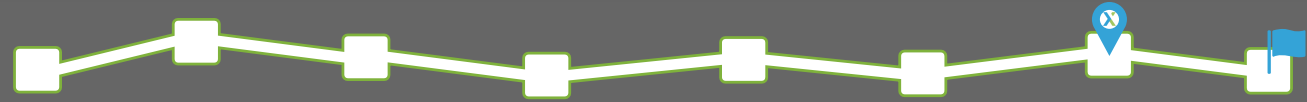
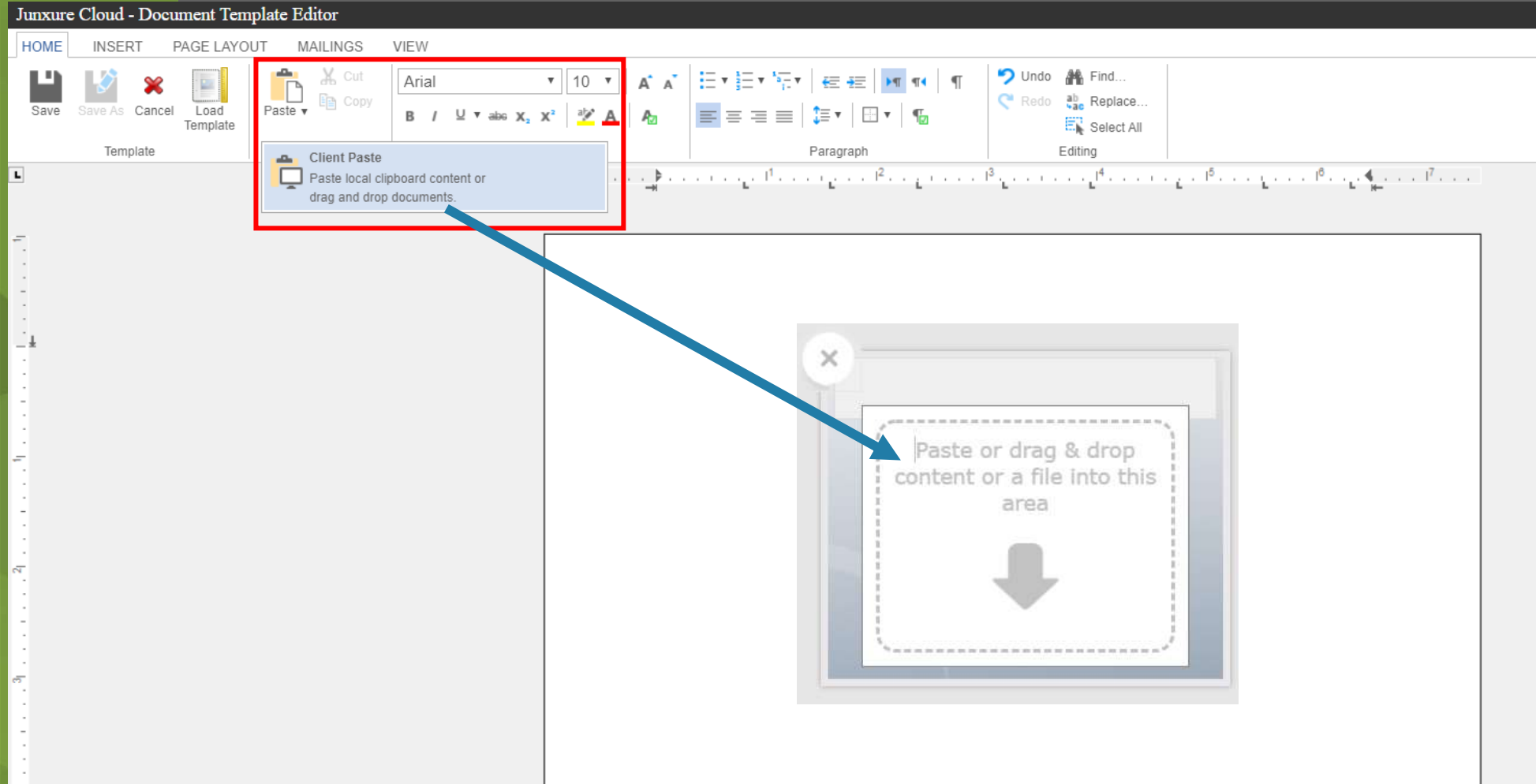
Values ↑	Description	Commands
Account Forms		[Edit] [Delete]
All Tax Forms		[Edit] [Delete]
All Tax Forms\2014		[Edit] [Delete]
All Tax Forms\2015		[Edit] [Delete]
Asset Statements		[Edit] [Delete]

For subfolders, simply list the name of the parent folder, add a backslash, and then the name of the subfolder.





# Paste Function is Different



# Correspondence Process

## Step 1

- Navigate to the Record Workspace.

## Step 2

- Use the Quick or Advanced Search to select the group of records you want to correspond with.

## Step 3

- Select the type of correspondence you want to use.

## Step 4

- Go to your System Alerts to either print out your letter or confirm that your email sent without issue.



# Sending Email from Junxure/Exchange

The screenshot displays the 'Correspondence Assistant - Email' window in Microsoft Word. The ribbon at the top includes 'HOME', 'INSERT', 'PAGE LAYOUT', 'MAILINGS', and 'VIEW'. The ribbon contains various icons for document management, recipients, email signature, clipboard, font, paragraph, and editing. The 'Next' button in the left sidebar is highlighted with a red box. The main content area shows the following text:

To: home@net.net


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



# Send Email from Junxure w/Microsoft 365

The screenshot displays the Microsoft Outlook interface with the Junxure for Outlook sidebar on the right. The main window shows an email composition screen with fields for 'To', 'Cc', and 'Add a subject'. The sender information for Tricia Cameron, Portfolio Advisor and CEO at Cameron Wealth Management, is visible. The Junxure sidebar includes a notification 'Template loaded: No template' and a 'Merge & Send' button, which is highlighted with a red box. Below this is a search bar and a list of data fields such as 'Account\_Review\_Note', 'Additional\_Form\_Date', and various 'Address' and 'Country' records. At the bottom of the Outlook window, the 'Send' button is circled in red with a red 'no' symbol over it, indicating it should not be used.

# 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-





Congratulations  
on finishing this  
series!

Next Steps:  
**On-Going Education  
Classes!**

Starting Point

