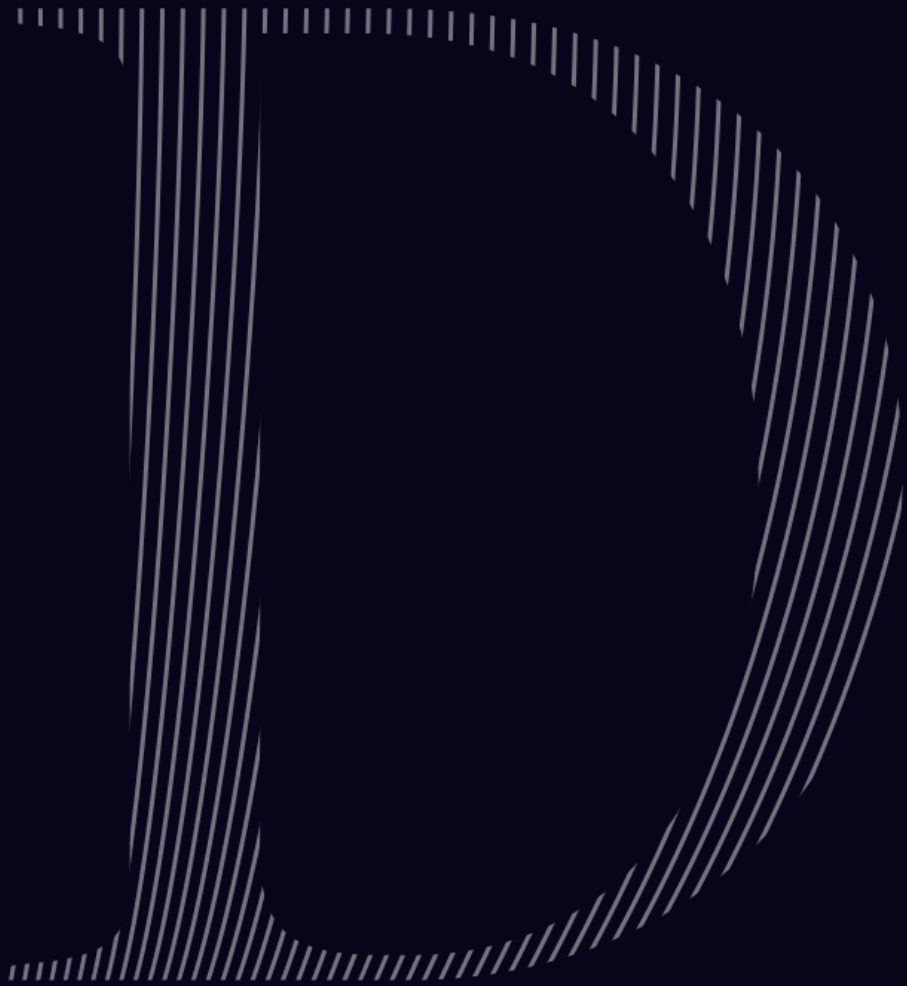




Starting Point Series





Documents & Correspondence

Today's Topics



- The Document Workspace
 - Interacting with Documents
 - Creating Folders
- Correspondence Templates
- Creating Mass Emails
- Correspondence Assistant
 - Letters, Labels

Document Storage

SUMMARY DETAILS ▾ WORKFLOWS ▾ FINANCIALS ▾ OPPORTUNITIES DOCUMENTS ▾ NOTES EMAILS INTEGRATIONS ▾

Documents ▸ Junxure Documents

Filter by tag...

+ Create Document + Upload Document

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

Commands	FileName	Description	Folder	Type	Created	Created by	Modified
⋮	Email - 7-23-2021	Correspondence Email	Email	Email	7/23/2021	Tricia Cameron	
⋮	details	Email Attachment	Attachments	Email Attachment	9/9/2020	Tricia Cameron	
⋮	Demonstration	Demonstration Email	Email	Email	10/13/2020	Tricia Cameron	
⋮	529 Plan	Email	Email	Email	10/12/2020	Tricia Cameron	
⋮	CWM Signature.docx	Example	Compliance	Letter	4/29/2021	Tricia Cameron	
⋮	Email - 8-26-2020	Correspondence Email	Email	Email	8/26/2020	Tricia Cameron	
⋮	Undeliverable: 529 Plan	Email	Email	Email	10/13/2020	Tricia Cameron	
⋮	Form CRS	Email	Email	Email	8/20/2020	Tricia Cameron	
⋮	Email - 3-18-2021	Correspondence Email	Email	Email	3/18/2021	Tricia Cameron	
⋮	Email - 6-17-2021	Correspondence Email	Email	Email	6/17/2021	Tricia Cameron	

Displaying items 1 - 10 of 71 10 ▾

Folders

- All Record Documents
- Account Forms
- Asset Statements
- Attachments
- Compliance
- Contracts
- Correspondence
- Documents
- Email
- Estate Documents
- Financial Planning
- Insurance
- Legal Documents
- Miscellaneous
- Notes
- Reports
- Tax Forms

Interacting with Documents

SUMMARYDETAILSWORKFLOWSFINANCIALSCOOPPORTUNITIESDOCUMENTSNOTESEMAILSINTEGRATIONS

Documents > Junxure Documents

FoldersAll Record DocumentsAccount FormsAsset StatementsAttachmentsComplianceContractsCorrespondenceDocumentsEmailEstate DocumentsFinancial PlanningInsuranceLegal DocumentsMiscellaneousNotesReportsTax Forms

Filter by tag...

+ Create Document+ Upload Document

Commands	File Name	Folder	Type	Created	Created by	Modified
	Email - 6-23-2021	Compliance	Email	7/23/2021	Tricia Cameron	
	details	Attachments	Email Attachment	9/9/2020	Tricia Cameron	
	Demo	Email	Email	10/13/2020	Tricia Cameron	
	529 Plan	Email	Email	10/12/2020	Tricia Cameron	
	CWM	Compliance	Letter	4/29/2021	Tricia Cameron	
	Email - 6-26-2020	Email	Email	8/26/2020	Tricia Cameron	
	Undeliverable: 529 Plan	Email	Email	10/13/2020	Tricia Cameron	
	Form CRS	Email	Email	8/20/2020	Tricia Cameron	
	Email - 3-18-2021	Email	Email	3/18/2021	Tricia Cameron	
	Email - 6-17-2021	Email	Email	6/17/2021	Tricia Cameron	

12345678>>

Adding/Uploading Documents

SUMMARY DETAILS ▾ WORKFLOWS ▾ FINANCIALS ▾ OPPORTUNITIES DOCUMENTS ▾ NOTES EMAILS INTEGRATIONS ▾

Junxure Documents
Citrix Sharefile

Documents ▸ Junxure Documents

Folders Filter by tag...

- All Record Documents
- Account Forms
- Asset Statements
- Attachments
- Compliance
- Contracts
- Correspondence
- Documents
- Email
- Estate Documents
- Financial Planning
- Insurance
- Legal Documents
- Miscellaneous
- Notes
- Reports
- Tax Forms

+ Create Document **+ Upload Document**

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

Commands	FileName	Description	Folder	Type	Created	Created by	Modified
⋮	Email - 7-23-2021	Correspondence Email	Email	Email	7/23/2021	Tricia Cameron	
⋮	details	Email Attachment	Attachments	Email Attachment	9/9/2020	Tricia Cameron	
⋮	Demonstration	Demonstration Email	Email	Email	10/13/2020	Tricia Cameron	
⋮	529 Plan	Email	Email	Email	10/12/2020	Tricia Cameron	
⋮	CWM Signature.docx	Example	Compliance	Letter	4/29/2021	Tricia Cameron	
⋮	Email - 8-26-2020	Correspondence Email	Email	Email	8/26/2020	Tricia Cameron	
⋮	Undeliverable: 529 Plan	Email	Email	Email	10/13/2020	Tricia Cameron	
⋮	Form CRS	Email	Email	Email	8/20/2020	Tricia Cameron	
⋮	Email - 3-18-2021	Correspondence Email	Email	Email	3/18/2021	Tricia Cameron	
⋮	Email - 6-17-2021	Correspondence Email	Email	Email	6/17/2021	Tricia Cameron	

1 2 3 4 5 6 7 8 > >>

Displaying items 1 - 10 of 71 10 ▾

Adding/Uploading Documents

Folders

Add New Folder **Select File**

All Record Documents

- Account Forms
 - 2021
 - 2022
- Asset Statements
 - 2021
- Attachments
- Compliance
- Contracts
 - 2020
- Correspondence
- Documents
- Email

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

Description

Created By

Cameron, Tricia

Type

Email

Tags

-Select Tags-

Cancel **Save & Close**

Drag & Drop Files

Documents > Junxure Documents

Filter by tag...

+ Create Document + Upload Document

DRAG A COLUMN HEADER AND DROP IT HERE TO GROUP BY

Commands	FileName	Description	Folder	Type
...	Email - 7-23-2021	Correspondence Email	Email	Email
...	details	Email Attachment		
...	Demonstration	Demonstration		
...	529 Plan	Email		
...	CWM Signature.docx	Example		
...	Email - 8-26-2020	Correspondence Email	Email	Email
...	Undeliverable: 529 Plan	Email	Email	Email
...	Form CRS	Email	Email	Email
...	Email - 3-18-2021	Correspondence Email	Email	Email
...	Email - 6-17-2021	Correspondence Email	Email	Email

Drop files here

+ Copy

File Home Share View

Pin to Quick access Copy Paste Move to Delete Copy to Rename New folder Properties Select

Clipboard Organize New Open

Quick access Desktop Downloads Documents Pictures Google Drive AE Logo_files JxT OGE Starting Point OneDrive - Person

12 items 4 items selected 146 KB

6/17/2021 Tricia Cameron

Displaying Items 1 - 10 of 71 10

The screenshot illustrates the process of uploading files to the Junxure Documents system. On the left, the Junxure Documents interface shows a sidebar with various document categories and a main table listing documents. A 'Drop files here' area is highlighted over the table. On the right, a Windows File Explorer window is open, showing a list of files. A blue box highlights four files: 'CWM Signature', 'CWM Welcome Letter - Email', 'CWM Welcome Letter 2', and 'CWM Welcome Letter'. A blue arrow points from this selection box to the 'Drop files here' area in the Junxure interface.

Global Folders & Sub-folders

AdvisorEngine

Record Search

Last 20 Records
Last 20 Actions
Records
Prospects
Actions
Opportunities
Assets
Insurance
Dashboards
Report Assistant
Email Mgmt
Correspond
Calendar
Documents
Workflow
Integrations
Settings
Import

List Maintenance

Audit Log
Database Export
Feature Security
Firm Profile
List Maintenance
Login Security
Record Layout Configuration
Service Monitor
User Defined Fields
User Group Management
User Profiles
Web Forms

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

List

Channel Detail
Classification
Communication Preference
Company Type
Country
Custodian
Custom Report Menu Categories
Custom Report Tags
Document Folder
Document Tag

1 2 3 4 5 6 7 8

Displaying items 11 - 20 of 79

+

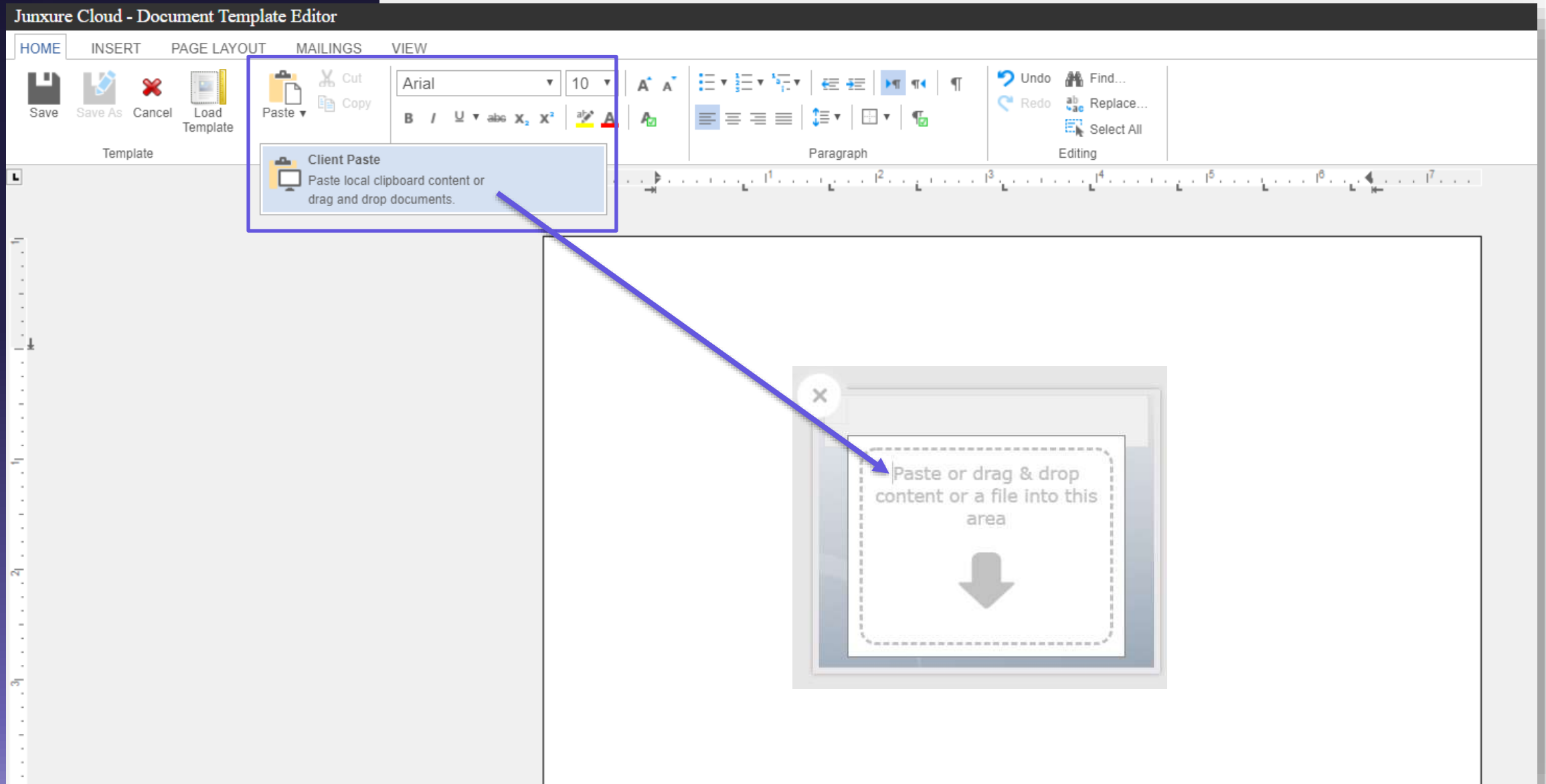
DRAG A COLUMN HEADER AND DROP IT HERE TO GROUP BY THAT COLUMN

Values ↑	Description	Commands
Account Forms		
Account Forms\2021		
Account Forms\2022		
Asset Statements		
Compliance		
Contracts		
Contracts\2020		
Correspondence		
Documents		
Email		

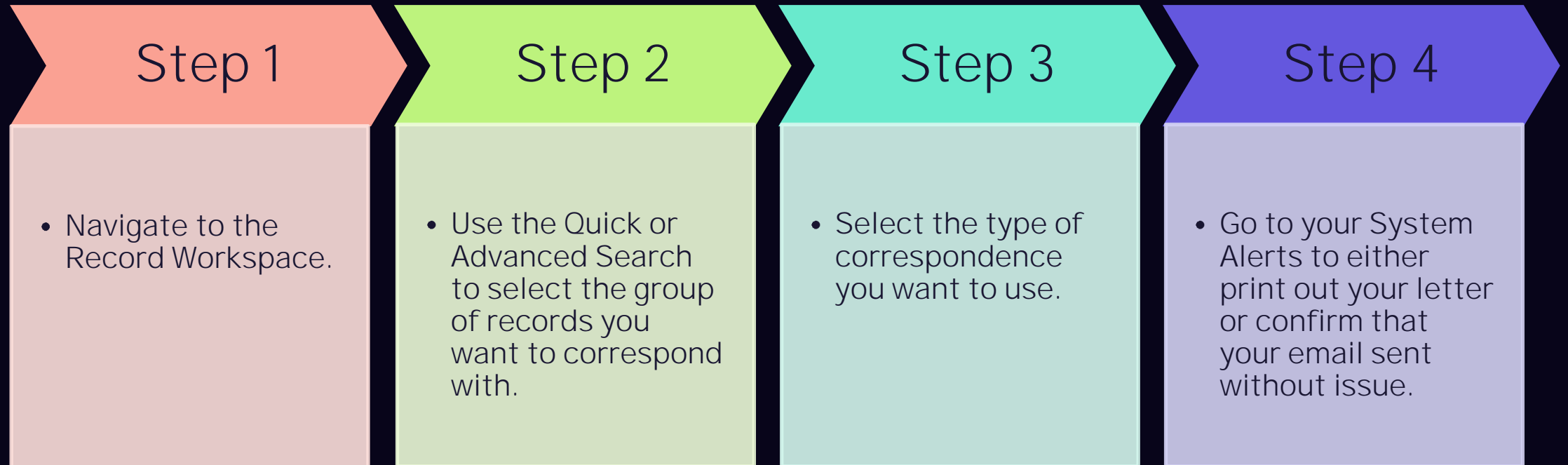
For subfolders, simply list the name of the parent folder, add a backslash, and then the name of the subfolder.

<https://www.junxurecloud.com/Tools/ControlPanel/ListMaintenance>

CRM Correspondence Editor – Paste Function is Different



Correspondence Process



Sending Email from CRM w/ Exchange

Correspondence Assistant - Email

HOME INSERT PAGE LAYOUT MAILINGS VIEW

Cancel Load Template Review Upload Insert Signature Paste Copy 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 CRM w/ Microsoft 365

The screenshot displays the Microsoft Outlook interface. On the right side, a sidebar titled "Junxure for Outlook" is open. It features a green status bar at the top that reads "Template loaded: No template" with an information icon. Below this, a button labeled "Merge & Send" is highlighted with a blue rectangular box. A search bar is positioned below the button. The sidebar contains a list of data fields, including "Account_Review_Note", "Additional_Form_Date", and various "Address_" fields. The main email composition area on the left shows a "To" field, a "Cc" field, and a subject line placeholder "Add a subject". The email body contains the name "Tricia Cameron", her title "Portfolio Advisor CEO", and the logo for "Cameron Wealth Management" with the tagline "Growing with You". The bottom of the interface shows a rich text editor toolbar and a "Discard" button. A large blue prohibition sign (a circle with a diagonal line) is overlaid on the bottom left corner of the image.

Sending Email from CRM

☒ Add Action to Records Using: Email ☒ Default Edit Action

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

Folders Add New Folder

- 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-

✕ Cancel ✓ Merge & Save



Thank You for
watching

Questions can be addressed to
crmtraining@advisorengine.com