Starting Point Series

AdvisorEngine

Email Management Using Exchange

Today’s Topics

- Email Integration – The What & Why
- The Outlook Add-In
  - Email
  - Calendar
- Sending an Email from the CRM

“Capture”

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The What and the Why

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The Outlook Add-in

Conditions to be Met

Andrews - George & Sally

PERSON

RECORD ID	2
SERVICE LEVEL	Platinum
ADVISOR 1	Tricia Cameron
ADVISOR 2	John Henry
CSR	Cheryl Addison
PHONE	(555) 555-0000
HOME EMAIL	home@net.net
HOME ADDRESS	25 Andrews Drive Oaks, CA 94555 USA
CLASSIFICATIONS	CENTER O... CLIENT TRUSTEE
TAGS	FINANCIAL... ESTATE PL... HOLIDAY G... +2
AUM	$13,614,954.66
FEE SCHEDULE	.75
CLIENT ANNIVERSARY	09/01/1995
OWNER GROUP	Everyone

George

MR. GEORGE ANDREWS

DATE OF BIRTH	01/19/1950
AGE	71.8
SSN	***-**-****
HOME ADDRESS	25 Andrews Drive Oaks, CA 94555 USA
HOME PHONE	(555) 555-5555 x
HOME EMAIL	george@email.net
COMMUNICATION PREFERENCE	Email
INTEGRATIONS	Constant Contact ACTIVE

Sally

MRS. SALLY ANDREWS

DATE OF BIRTH	05/25/1955
AGE	66.5
SSN	***-**-****
HOME ADDRESS	25 Andrews Drive Oaks, CA 94555 USA
CELL PHONE	(555) 780-7687 x
BUSINESS EMAIL	sandrews@andrewstools...
COMMUNICATION PREFERENCE	Email
INTEGRATIONS	Constant Contact ACTIVE

Client or Email

Email Addresses

+ Add New | Edit

Type:	Email:	Label:	Belongs To:	Primary:	Add'l:
Home	home@net.net		Andrews - George & Sally	☑	☐
Home	george@email.net	George Home	George Andrews	☑	☐
Business	gandrews@andrewstools.com	George Work	George Andrews	☐	☐
Business	sandrews@andrewstools.com		Sally Andrews	☑	☐
Home	sally@email.net	Sally Home	Sally Andrews	☐	☑

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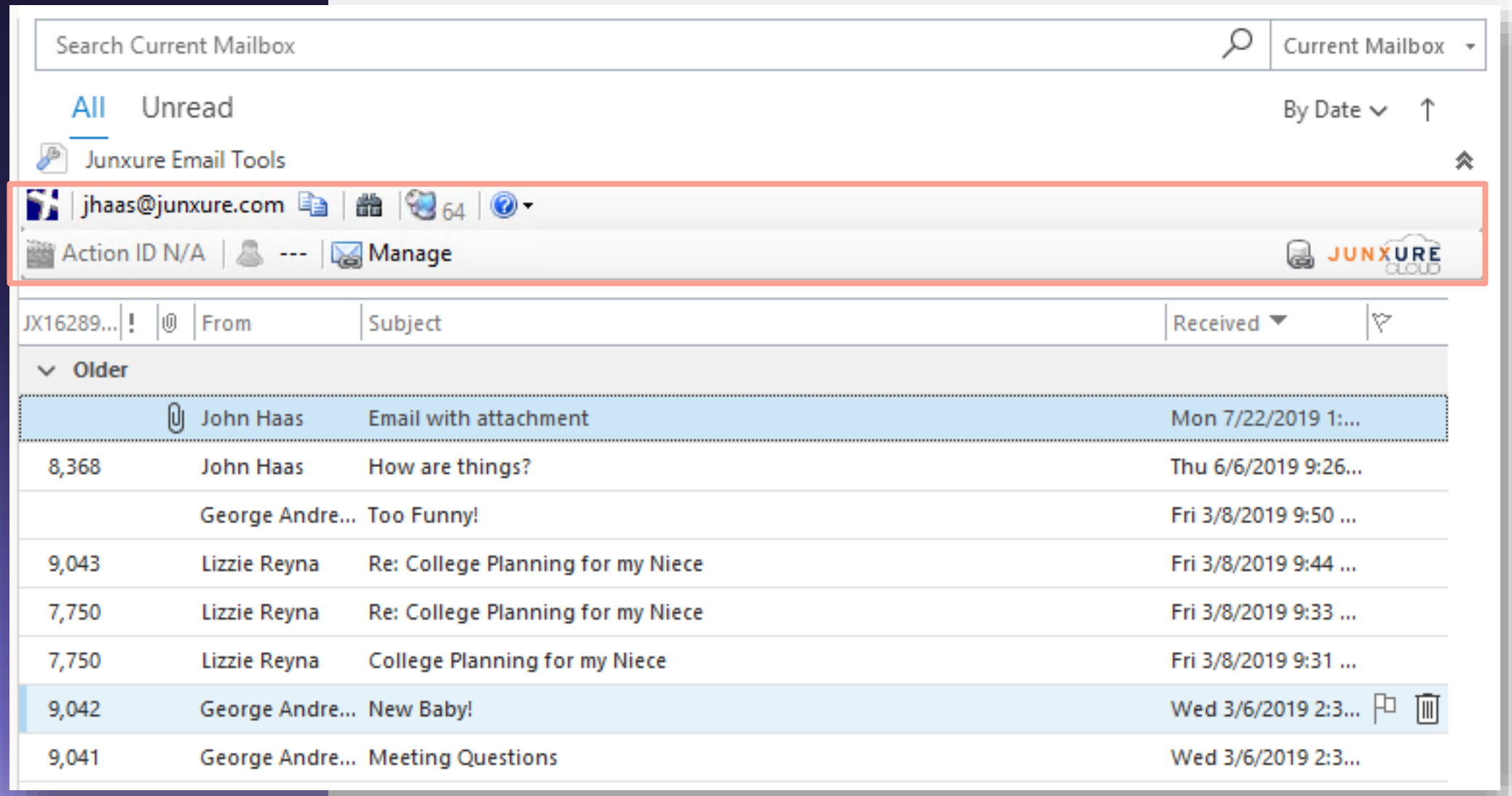
The Outlook Add-in



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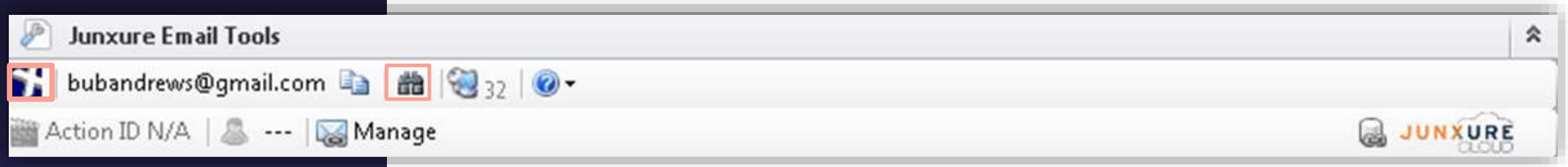
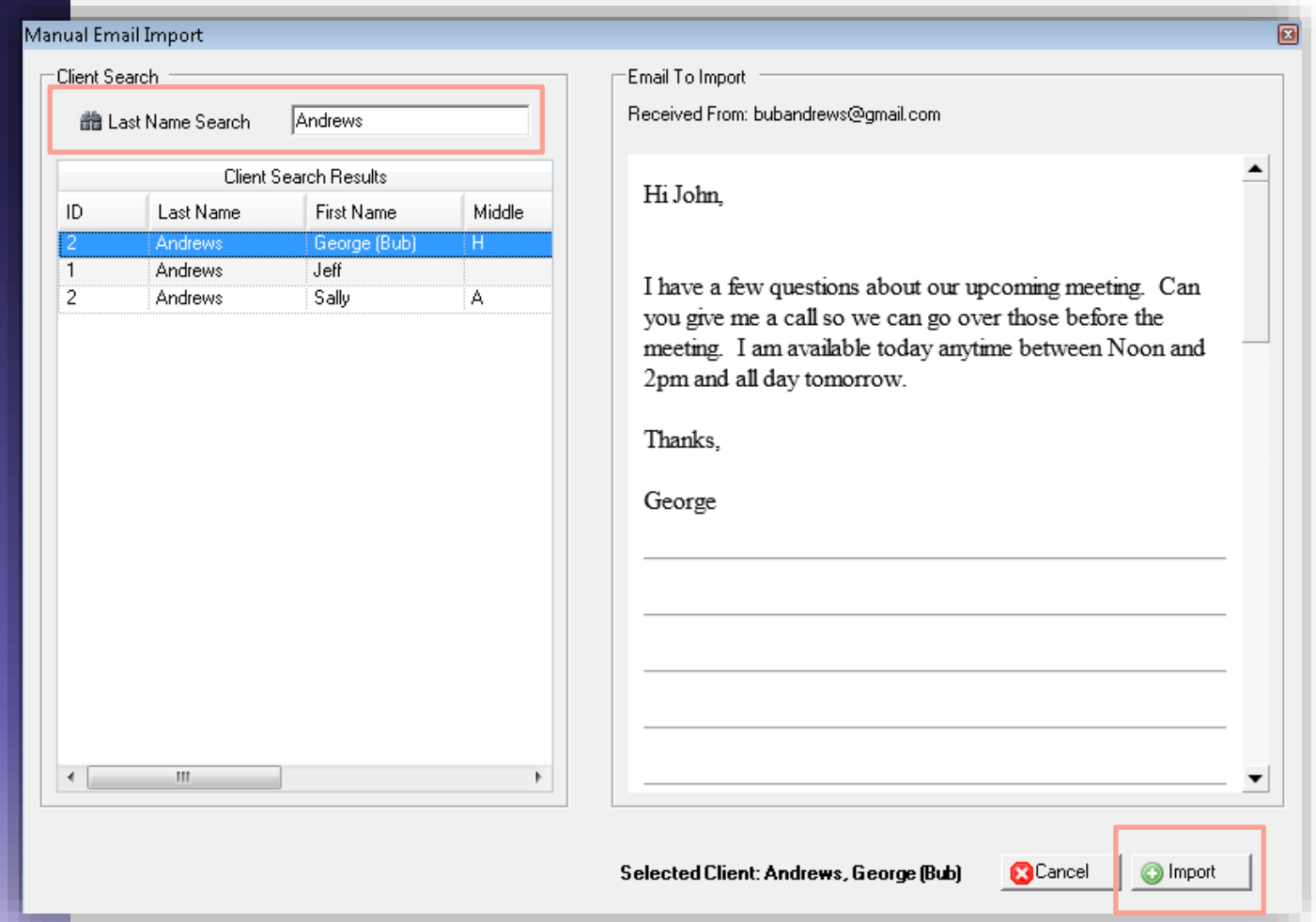
Manual Capture





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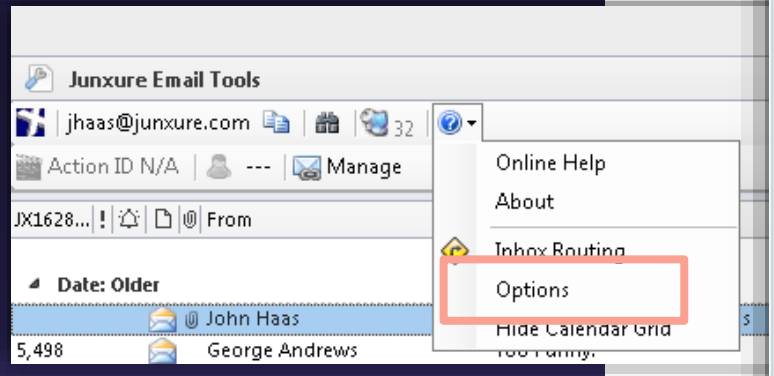
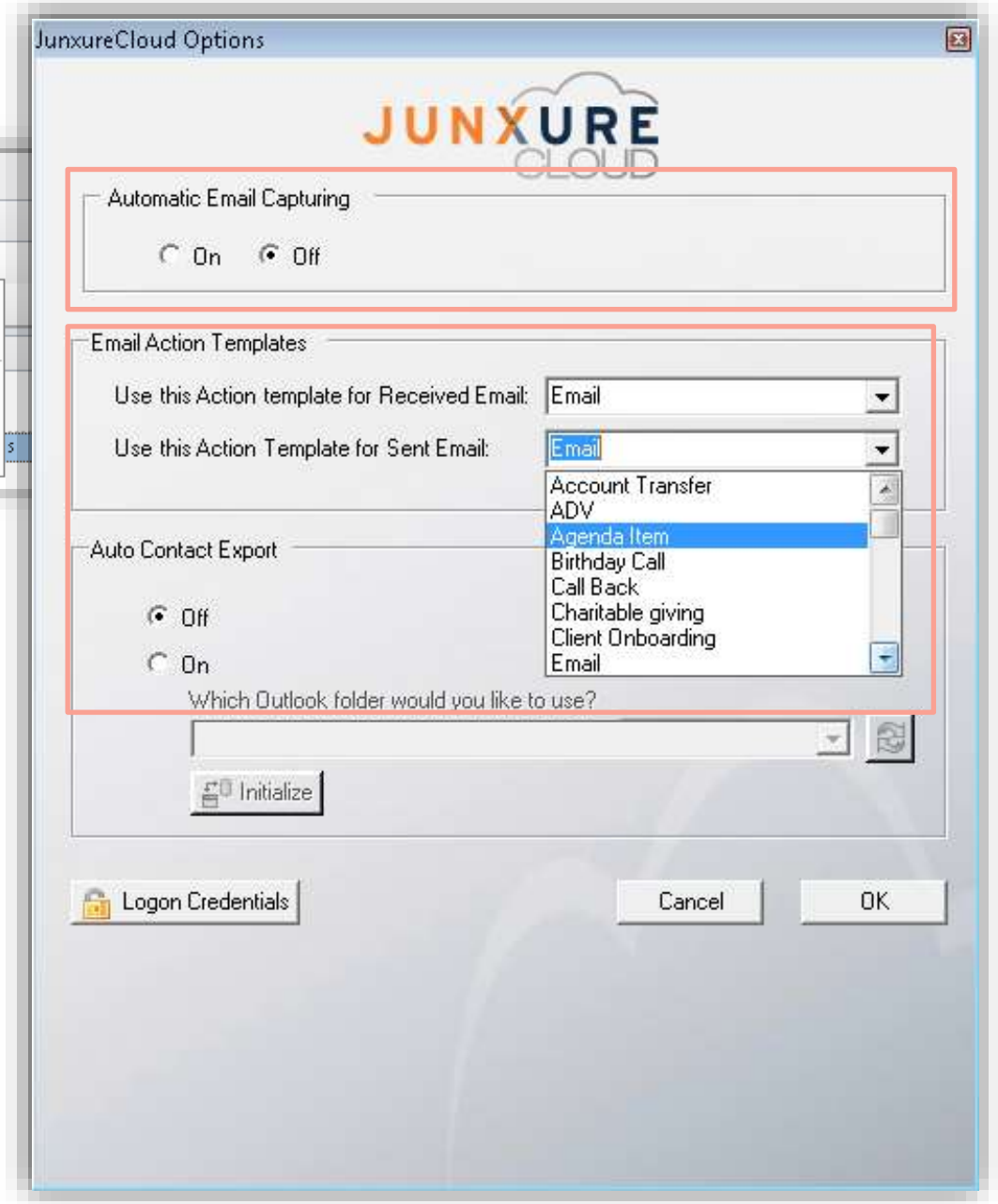
The Outlook Add-in - Options





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Will I get a Pending Action?

Back to Workflow List

Be sure to click Save Template to keep your changes

Delete Templat

Workflow Setup and Edit

Workflow Category * Actions General

Status * Active

Last Edited By Haas, John

Workflow Name * Email Required

Owner Haas, John

Last Review

Workflow Description/Trigger

First Step completes automatically on add

Summary

Assigned : <Employee Creating Action> **Type:** Email

Subject :

Notes: *

Formats

Font Sizes

Type * Email

Category Select an Option

Tags Select Some Options

Action Required

Assigned * <Employee Creatin...

Priority Select an...

Days Until Due

FYI on Save

Select Group Select Group to FYI

Viewing All

Adv 1

Adv 2

CSR

Cochrane, Julie

Graeber, Chris

Haas, John

Operations, Queue -

Standard

Detailed

Cancel

Save

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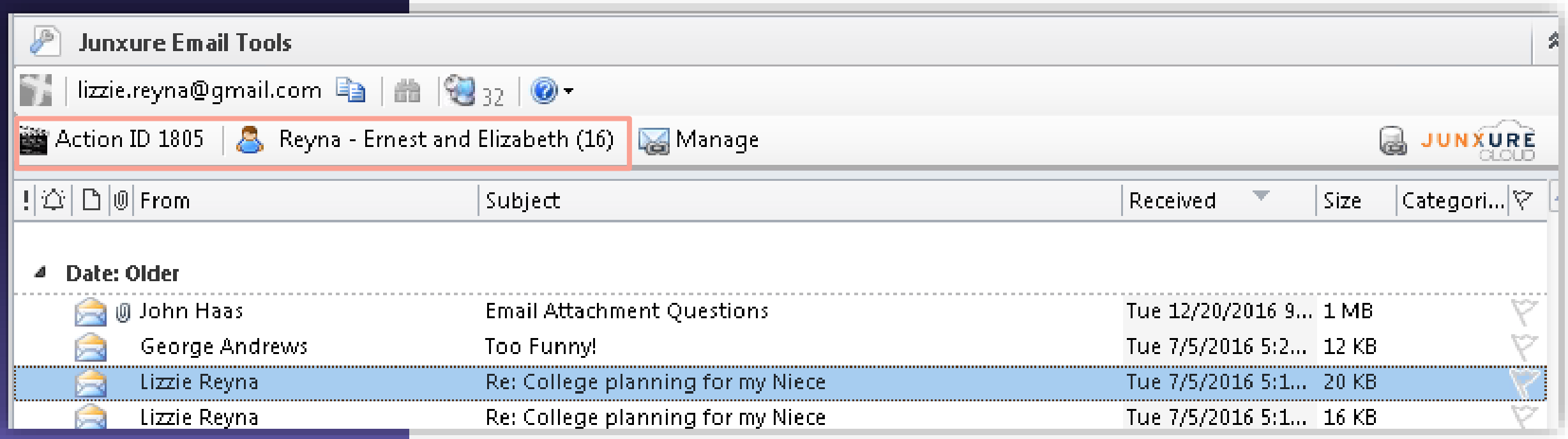
Navigation Tools



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Managing Emails

Search Inbox (Ctrl+E)

Junxure Email Tools

lizzie.reyna@gmail.com

Action ID 1805 | Reyna - Ernest and Elizabeth (1) | Manage

JUNXURE CLOUD

From	Subject	Received	Size	Categori...
Date: Older				
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	
Lizzie Reyna	College planning for my Niece	Tue 7/5/2016 5:1...	10 KB	
Reginald Lawyer	Andrews Estate Planning	Tue 4/19/2016 1:...	15 KB	
George Andrews	Meeting questions	Tue 4/19/2016 1:...	16 KB	
John Haas	Client needs this	Thu 2/25/2016 1:...	9 KB	

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 lo
it's worth it for Ernie and I to refinance? Pleas
discuss.

Thanks,

Liz

On Tue, Jul 5, 2016 at 5:17 PM, Lizzie Reyna <lizzie.reyna@

Oh Yes, 529 plans it was...all of the numbers can g
I can meet any day except Thursday or Friday next
leave Thursday mornings for long weekends at the
schedule availability look like?

Liz

On Tue, Jul 5, 2016 at 5:16 PM, John Haas <jhaas1721@gr

Hi Liz,

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

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Managing Emails

Search Inbox (Ctrl+E)

Junxure Email Tools

lizzie.reyna@gmail.com

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

JUNXURE CLOUD

From	Subject	Received	Size	Categori...
Date: Older				
John Haas	Email Attachment Questio			
George Andrews	Too Funny!			
Lizzie Reyna	Re: College planning for m			
Lizzie Reyna	Re: College planning for m			
Lizzie Reyna	College planning for my N			
Reginald Lawyer	Andrews Estate Planning			
George Andrews	Meeting questions			
John Haas	Client needs this			

Re: College planning for my Niece

Lizzie Reyna <lizzie.reyna@gmail.com>

Sent: Tue 7/5/2016 5:18 PM

To: John Haas

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it's worth it for Ernie and I to refinance? Pleas

a <lizzie.reyna@

umbers can

or Friday nex

ekends at the

<jhaas1721@g

e 529 plans,

we schedule

can discuss all options further. Sound good?

Manage Emails - Client Action ID 1805

Preview

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

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 you 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

Related Emails

Found 4 Emails That Are Linked To This Action

Select	ClientName	Imported	FromAddress	Subject	ToAddress	InFolder
☐	Reyna - Ernest a...	07/05/2016	lizzie.reyna@gm...	Re: College plan...	jhaas1721@gm...	Inbox
☐	Reyna - Ernest a...	07/05/2016	lizzie.reyna@gm...	College planning...	jhaas1721@gm...	Inbox
☑	Reyna - Ernest a...	07/05/2016	lizzie.reyna@gm...	Re: College plan...	jhaas1721@gm...	Inbox
☐	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

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Calendar – From CRM to Outlook

Status: Incomplete **Assigned** : Cameron, Tricia **Type:** Meeting **ID:** 1294

Subject SM - Meeting

Linked: Assets Documents Emails Insurance Opportunities User Defined Fields Calendar

Notes: * Notes saved less than a minute ago

Formats B I 12pt

Time Set: 2:00 PM EST

Location: Google Meeting link- Video call link: https://meet.google.com/cnn-tijo-yxx

Type of Meeting - Annual Review

Notes:

Complete Service to schedule next interval

Add Relevant Tags

Entered By * : Cameron, Tricia

Created * : 11/08/2021 4:03 PM

Time Spent : Minutes

Type * : Meeting

Category : Meetings

Tags : Select Some Options

Action Required

Assigned * : Cameron, Tricia

Priority : Time S...

Start Date :

Due Date * : 12/16/2021

Completed

FYI on Save :

Select Group : Select Group to FYI

Viewing : All

- Adv 1
- Adv 2
- CSR
- Addison, Cheryl
- Cameron, Tricia
- Hare, Josh
- Henry, John

Service Monitor:

- Client Touch | Due: 11/05/22
- Meeting | Due: 11/19/21
- Special Interest Article | Due: 06/29/21

Cancel Save

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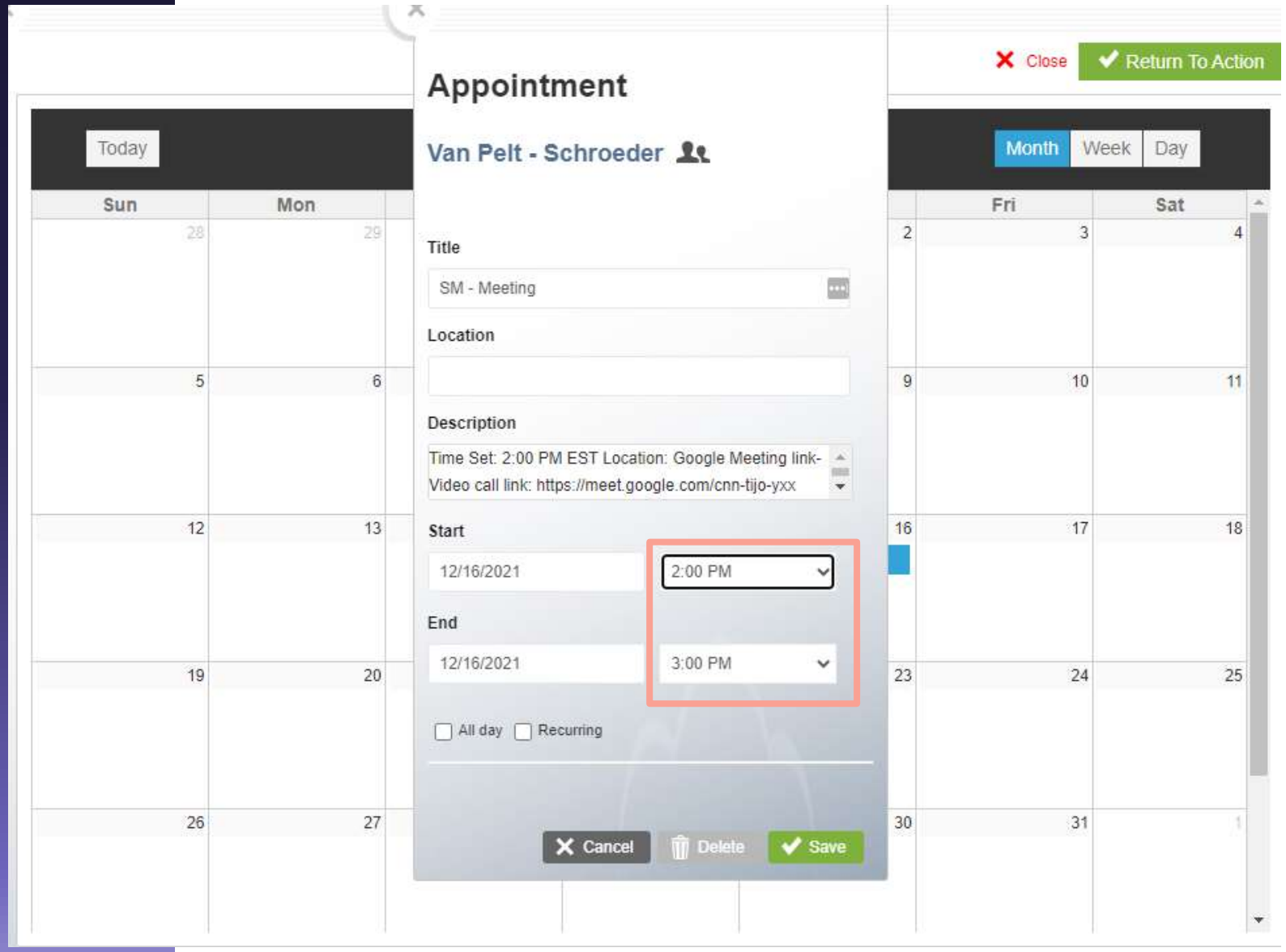
Calendar – From CRM to Outlook



AdvisorEngine

Sending Email from CRM

Status: Incomplete **Assigned** : Cameron, Tricia **Type:** Meeting **ID:** 1294

Subject : SM - Meeting

Linked: Assets Documents Emails Insurance Opportunities User Defined Fields Calendar

Notes: *

Notes saved less than a minute ago

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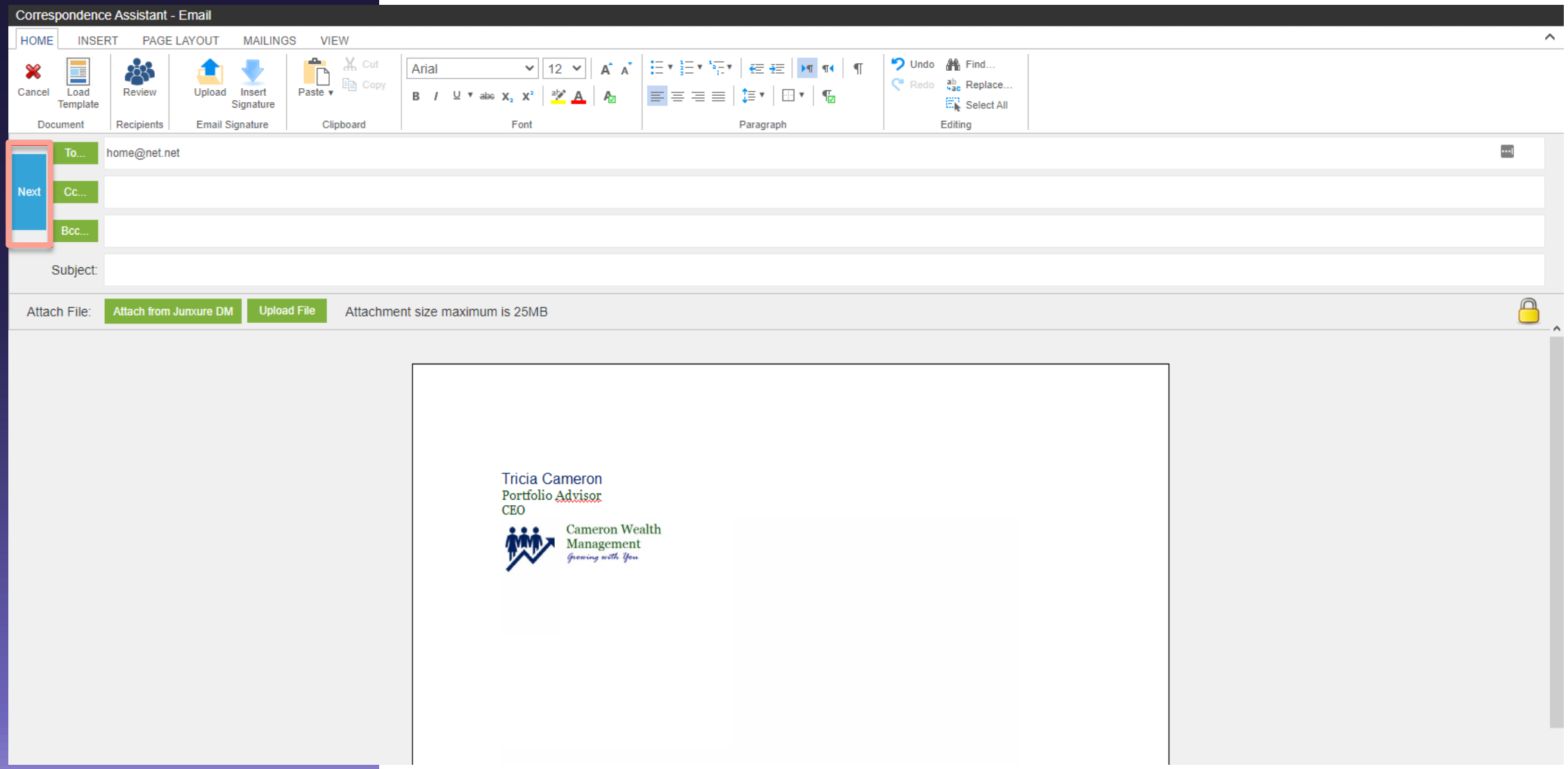
AdvisorEngine

Sending Email from CRM



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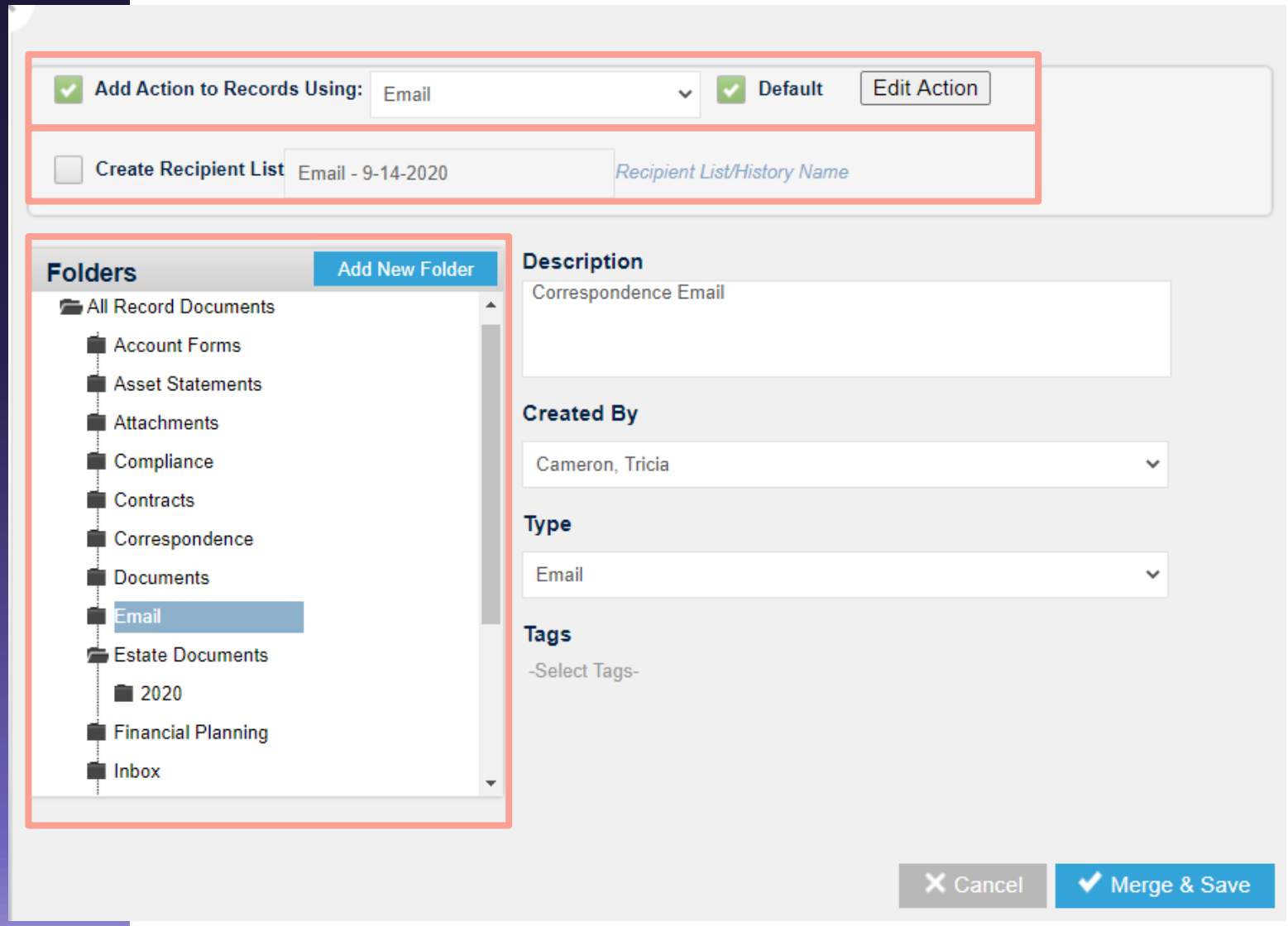
Sending Email from CRM



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Thank You for watching

Questions can be addressed to

crmtraining@advisorengine.com

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