

Power User Award Criteria

- Commitment to Junxure from all levels of the firm**
- Daily use of program throughout firm**
- Utilizes all integrations applicable to firm**
 - Outlook**
 - Portfolio management**
 - Custodial**
 - Document management**
 - Financial planning**
- Not only stores but interacts with/uses data kept within records**
- Has customized record related drop down lists to meet firm's needs**
- Tracks non-client record information in Junxure (prospects, professionals, clients' relatives, etc)**
- Actively uses Contact Rules**
- Actively uses Contact Reports**
- Has customized action related drop down lists to meet firm's needs**
- Relies on Junxure for ongoing task assignment and tracking**
- Has created and uses Action Templates**
- Has created and uses Action Sequences**
- Uses Recurring actions for client related reminders**
- Uses Recurring actions for non-client related items**
- Uses Deliverables**
- Tracks Opportunities**
- Communicates through Junxure using global letter/email functionality**
- Has created and uses email and document templates**
- Customizes grid views throughout program**
- Uses built in reports from Reports List**
- Attends training offered by Junxure throughout the year**
- Incorporates Junxure training and best practices into team meetings**
- Actively participates in user groups, panel discussions, user forums**