Thursday TIP

It was nice to connect with a number of you in New Orleans. We learned a lot at the National Conference and will pass on that knowledge through a series of Thursday's Tips. For those who attended the conference, if you discovered anything that should be shared with the group, please feel free to let us know so that we can include it in a future tip. Some things we learned will go out as standalone tips but today we are sharing a collection or random knowledge we picked up.

- All items submitted through the suggestion box are reviewed and directed to the appropriate department to address or take action. They are all catalogued to identify suggestions that come from a number of sources to enable them to prioritize future enhancements. We have submitted several items to the suggestion box and have already seen some of those suggestions implemented. We have also received follow-up communications if they needed clarification or additional details regarding a suggestion.

- Training>Training Resource Library
  You can search by typing what you are looking for under Resource Name, you can sort any column alphabetically by clicking the corresponding arrow to the right of any heading depending on whether you want the results A-Z or Z-A, or you can use the drop down menu to select everything in the library for a specific topic within the Application menu or all videos from the Material Type menu.

- Years of experience does not automatically update on your client profile. This is considered part of the know your client profile and should be reviewed as part of recommendations for new sales. Manually updating every account on an annual basis would be a cumbersome project for you/your staff so establish a procedure to review and update any necessary fields on the account in conjunction with entering sponsor transactions.

- If you don't know anything other than the type of account the client has and want to insure you are taking relevant paperwork to a client meeting you can use the Add Account feature and complete just the Account Type fields. Once you have completed through the Registration menu, hit the Select and Print Forms button and the next screen will display all of the required documents to open that account. There will also be a list of Optional forms so you can select the appropriate forms to transfer the existing assets, etc. to minimize having to go back to client for additional documents.

- Within Account Mgr>CRM you can add columns to your data view. Icon can be found when you are in search mode between the printer icon and the disc icon. This will generate a Display Columns pop-up. Highlight column headings under Available and send to Selected to add, vice versa if you would like to remove columns. The addition of Data Source was recommended because it will show you whether the valuations are automatically updated or if it is a position that requires manual updating. You can also select the order you want your columns to display

by highlighting a title and using the arrows on the right to move that title up or down in the display list. Hit Apply once you have all of the column headings you would like listed in the Selected side. The new options will be reflected as soon as you hit Search. You can also rearrange the order the columns are displayed when you are in the CRM view by simply grabbing a column title and dragging it to the position you want it to appear and all the data from that column will instantly move.

- If you have set up households the Master Record will show as bold in the CRM account list.

- When you submit items through New Business>Account Servicing >Submit & Search, (i.e. Move Money), when you get to the final screen the right side of your window should show Note this Request in Account Manager with a box that you can enter up to 1500 characters immediately below. If the box is checked, any notes you put in that field will post to the notes section of CRM for that account.

- There are two ways to submit follow-up documentation like additional change of dealer forms for existing registrations. Currently I believe most are using Virtual Office>Vault>New Accounts/ Transactions>Existing account maintenance. To determine the status of this paperwork you are limited to checking the Vault Transmit Activity Log or NBS Status. If you use the alternate method for submission: New Business>Account Servicing>Submit & Search>Research Request, you will have the ability to track the progress of the paperwork.

- Certain tabs have been red since we got here so we assumed they were always that way. In actuality, tabs turn red when there is action needed under those tabs.

- We haven't even begun to scratch the surface of resources available to us. For example, Running Your Office>Office Efficiency Tools>Free Tools to Run Your Business Better & Help for Hiring, Training & Managing Staff pages both include extensive lists of useful information.

I will be happy to walk you through some of these discoveries if you have any questions.