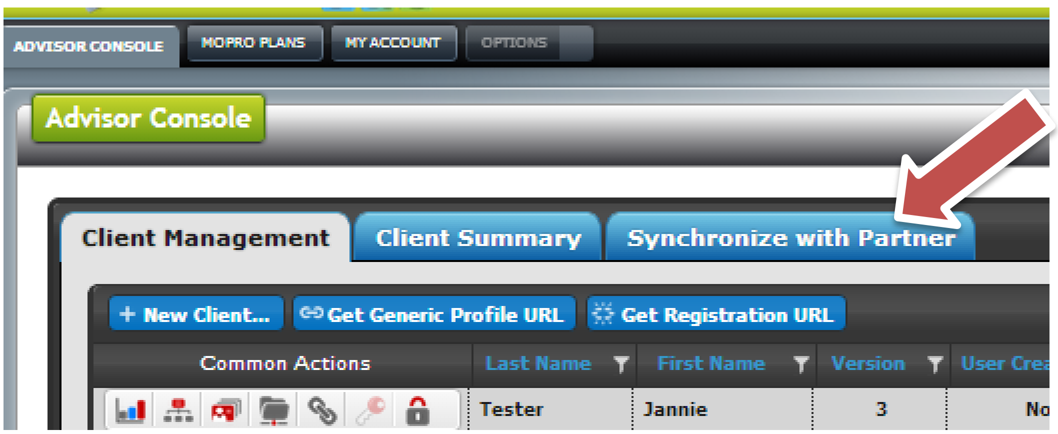
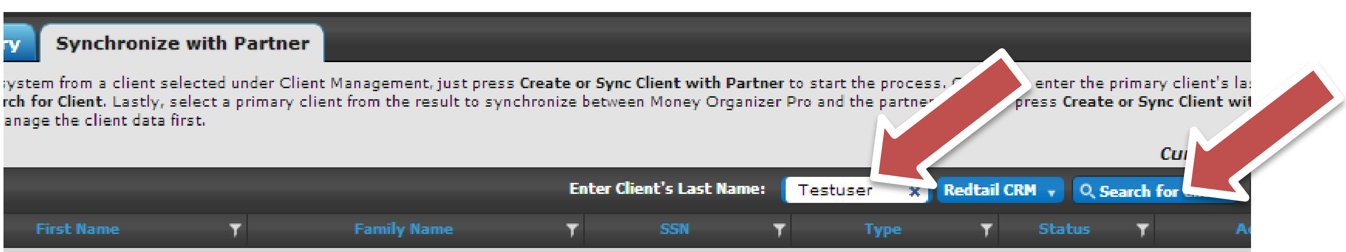
NOTE- To Export a client's data to Redtail from Money Organizer Pro you must be a paying subscriber of both Redtail Technology and Money Organizer Pro, and you must first have your integration setup complete- It only takes a minute. (see FAQ- Redtail Integration Setup)

To Export to Redtail

If your settings **are not set with Redtail as the Default Partner** (see Redtail Integration Setup FAQ for more information) then you won't be able to just use the **Synchronize** icon as shown below. Instead you will have an extra couple steps. First- click on the **Synchronize with Partner** tab:

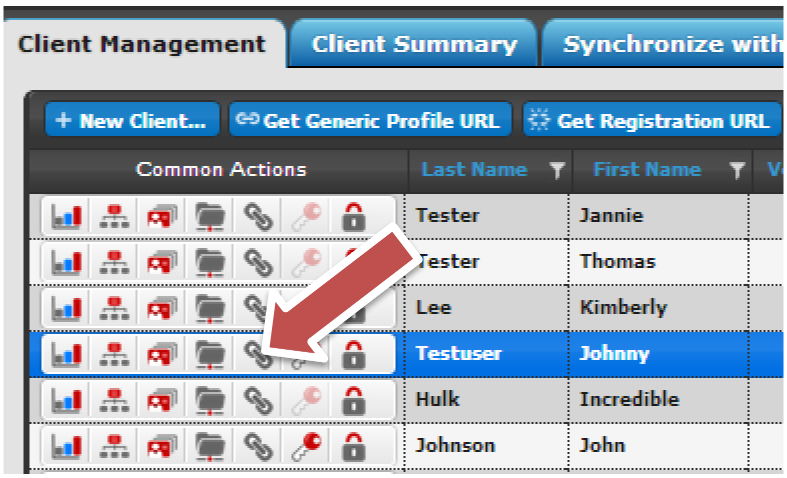


Enter the last name of your client and click **Search for Client**:

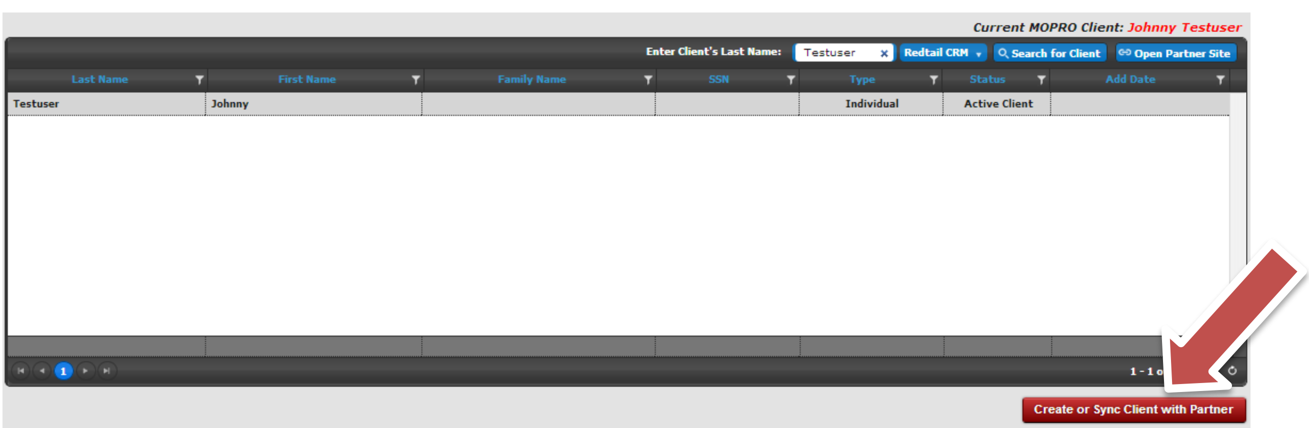


This action will provide a list of same-name clients for you to choose from. Click once to highlight your selection and click **Create or Sync Client with Partner** (skip to **Export Into Partner)**

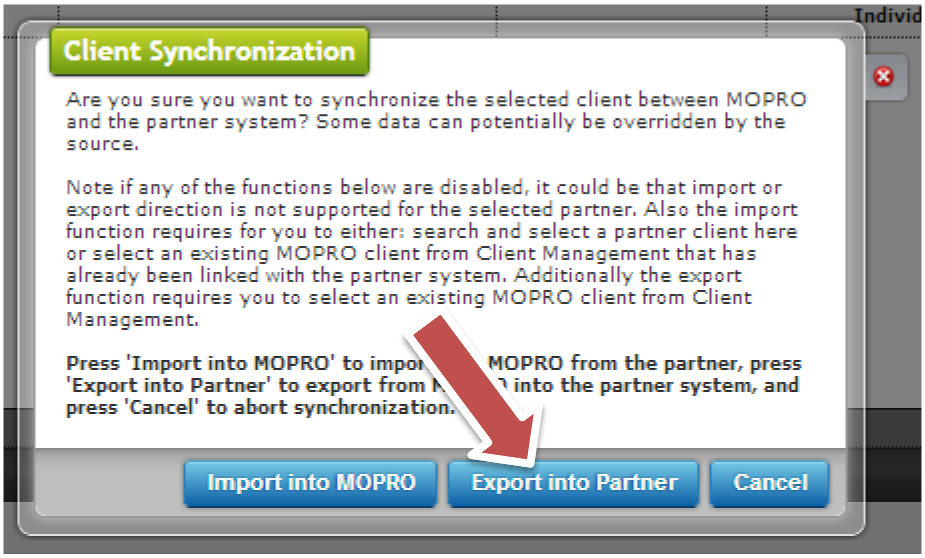
If you do have Redtail as the Default Partner, then from the Advisor Console you can simply click the **Synchronize** Icon and you will automatically be taken to the Synchronize with Partner tab with client name prefilled in the name search field:



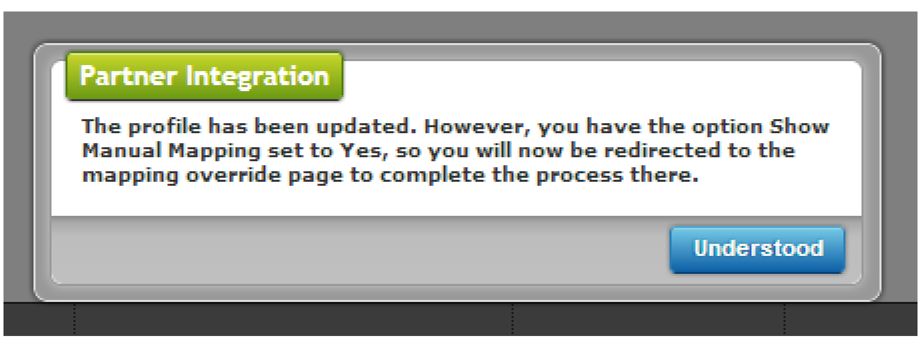
From the Synchronize with Partner tab click the Create or Sync Client with Partner



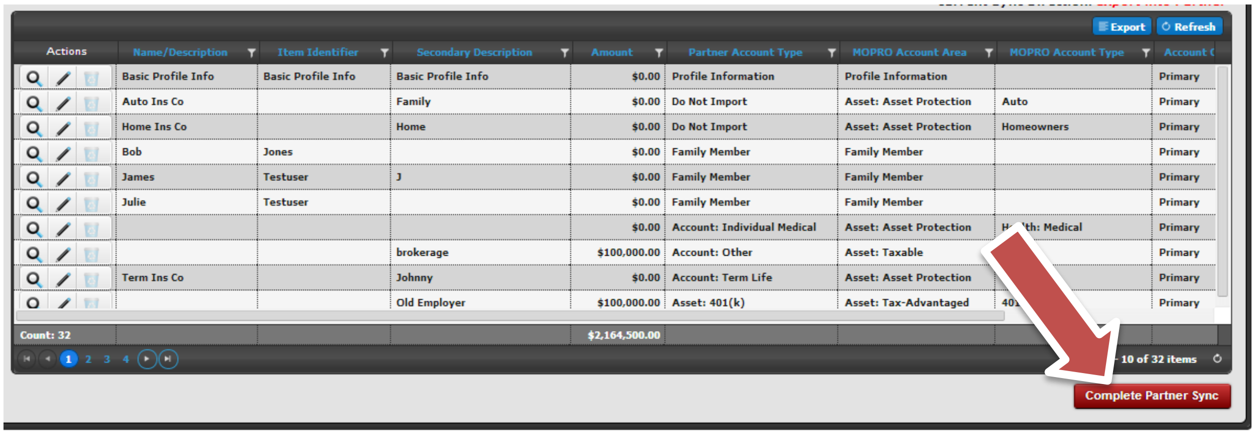
Click **Export into Partner** on the Client Synchronization window



Click **Understood** on the Partner Integration window:

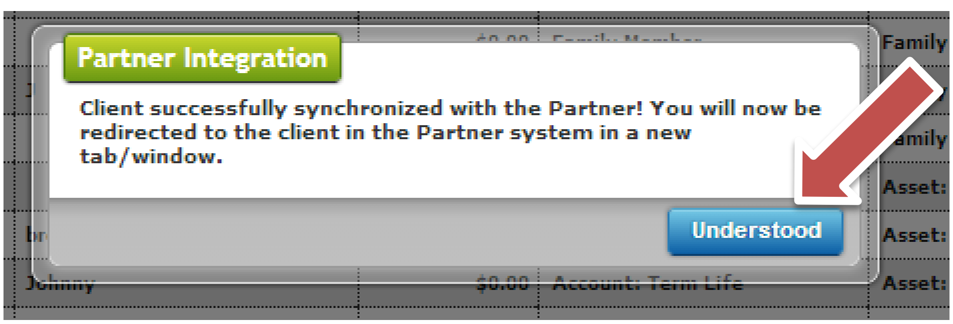


Click Complete Partner Sync: (note-you don't need to change any of the mapping fields, but you can if you prefer)



(note-this could take a moment while the fields are mapped over)

Click **Understood** in the Partner Integration window letting you know the Client was successfully synchronized and now you will be redirected to Redtail where you can review the data and add notes in Redtail.



You have completed the Export process. Wasn't that simple? You're ready to export your next client.