

Working with Redtail clients in WealthElements

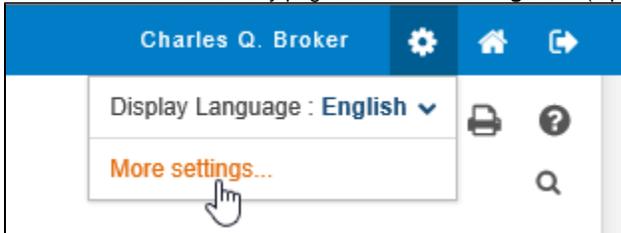
1. This step by step guide to working with Redtail clients in WealthElements details how to access your Redtail clients from within the WealthElements application, as well as the behavior of the application with respect to imported Redtail data. Instructions for all other WealthElements application functions can be found in the WealthElements user guides.

This guide includes how-to instructions and general information on the following topics:

- Connecting to the Redtail CRM
- Viewing your Redtail clients
- Creating a new session for a Redtail client
- Opening, copying or deleting a Redtail client session
- Data imported from Redtail
- Synchronization of data imported from Redtail

Connecting to the Redtail CRM

1. In the main button bar on any page click on the **Settings** icon (top right side) then select **More settings...**



2. In the User Settings menu that appears on the left of the page, select **Import Integrations**.
3. In the Redtail section that appears on the right, enter your Redtail Username and password in the appropriate boxes, then click on the **CONNECT** button.
4. The confirmation message 'Successfully connected to Redtail.' will appear and the connect button will change to a disconnect button.
5. Once the connection is made, the information is stored with your user information within WealthElements and the connection will automatically be established when you log into WealthElements.

Viewing your Redtail clients

1. In the Home page , click on the **Clients** menu located on the left side of the page.
2. The page on the right will then display a list of all of your clients.

- a. The top section displays all of your Redtail clients, listed alphabetically, 10 per page,

- Hovering your cursor over the small question mark icon to the right of the name will display the Redtail ID number.

- b. Beneath that is the listing for Local Database clients, or clients you have created and stored locally within the application. These are also listed alphabetically, 10 per page.

Note: These lists can be filtered and the display order can be changed by clicking on the small magnifying glass  search tool located on the top right of the table. This will open a search row, allowing you to filter and sort by the criteria in any column. For more information please refer to the WealthElements user guides.

3. Clicking the down arrow on the **Actions** menu located on the far right of each row, allows you to open the last session, create a new session or search for all existing sessions for this client. *For more information please refer to the WealthElements user guides.*
4. If a client exists in both the Redtail database and in the Local Database, the name will only appear under the Redtail section and all sessions for that client will be accessed through the listing in the Redtail section.



Creating a new session for a Redtail client

1. In the Home page  , with the Sessions page active, click on the **Create new...** link located on the bottom left, beneath the table.
2. Enter a session name.
3. Click on the radio button to the left of **Select existing investor**.
4. Locate your client in the Redtail client list. (You can use the search tool  to filter and re-order the list.)
5. Click on the large blue **SELECT** button on the right of the appropriate row. The button will change to **SELECTED**, and the selection of all other clients will be deactivated.
 - To de-select this client, click on the **SELECTED** button.
6. Click on the **SAVE** button located on the bottom left of the page.

Opening, copying or deleting a Redtail client session

On the Home  Sessions page, you can see all sessions you have worked on in WealthElements. If they involve Redtail clients they will be identified with the  logo under the Imported from column on the right.

1. Locate your client / session in the main Sessions page list. (You can use the search tool  to filter and re-order the list.)
2. Click the down arrow on the **Actions** menu located on the far right of the appropriate row, then select Open, Copy or Delete. For more information please refer to the WealthElements user guides.

Data imported from Redtail

General client information:

- First name
- Last name
- Date of birth
- Title (Mr., Mrs.)
- Gender
- First name
- Address
- Contact card information such as phone numbers and emails (in future release).

Important note: if a client was imported as a family group, sessions can only be created for them as a family group or household. Individual sessions cannot be created for the family members individually.

Accounts:

- All of the client's accounts are imported from Redtail when creating a new session. For a family group, all of the family head's accounts as well as all accounts of other 'family' members are imported when creating a new session.
- Assets must have a valid CUSIP or ticker symbol to be imported.
- Assets without a valid CUSIP or ticker symbol will be treated as custom assets and given an asset category breakdown of 100% 'others'. (These can be edited in the Custom Assets page. For more information please refer to the WealthElements user guides.)
- Assets without any CUSIP and ticker symbol will be treated in the following way:
 1. if there are some existing assets in the account, those without a CUSIP and ticker symbol will be ignored, or
 2. if all assets in the account are without a CUSIP and ticker symbol, then the account value will be entered as a straight asset mix, using the sub-class of 'others'. (This can be edited in the Current Portfolio page. For more information please refer to the WealthElements user guides.)

Synchronization of data imported from Redtail

- Each day, the first time a session is opened, the system automatically checks to see if the data in the session is up to date with that in Redtail. If it is not, a pop-up window will appear, asking you if you wish to overwrite the actual data and synch this session data with Redtail. You can choose **SYNCHRONIZE** or **CANCEL**. The system will not ask again for 24 hours.

- If client information is updated, it will update and overwrite the client information in all sessions for that client.
- If account information is updated, it will update and overwrite the account/asset information only in that specific session for that client.
- If you wish to force a synchronization, at any time you can click on the synchronize icon  that appears on the top right of each page, once a Redtail client session is loaded.
 - The system will synchronize this client's data.
- When a session is synchronized, new Redtail accounts will be added and Redtail accounts already existing in WealthElements will be updated, even if the name has been modified. If accounts are deleted in Redtail, they must be deleted manually in WealthElements.

If you have any questions or comments please contact our support desk by  at 1-855-366-3141 or by  at info@wealthelements.com



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