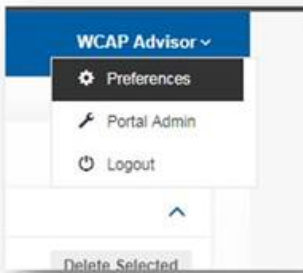


GDX360 / REDTAIL Integration

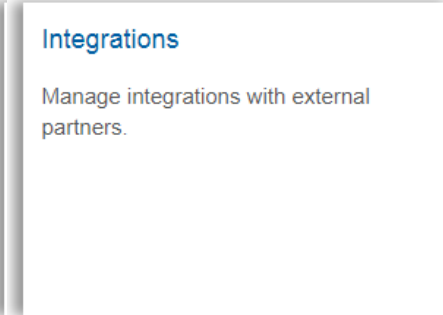
This single direction integration will allow you to create client households in REDTAIL and import them directly into GDX360 reducing the redundancy of having to create a client household in both systems. This is also a more efficient way of converting a prospect to a client.

1. Begin the Single Sign On process in GDX360 by choosing *Preferences* from the dropdown next to your name in the upper right-hand corner of the Advisor Dashboard.
2. Next, *click the title* in the Integrations Block and *choose REDTAIL*.
3. *Enter your REDTAIL Username and Password* and *click Connect to REDTAIL*. You will only have to complete this process initially.

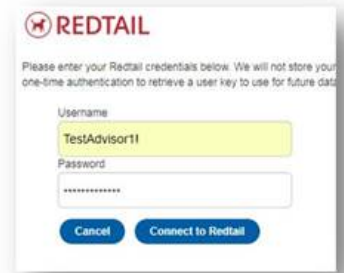
1



2

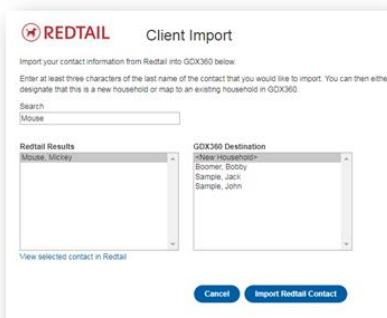


3

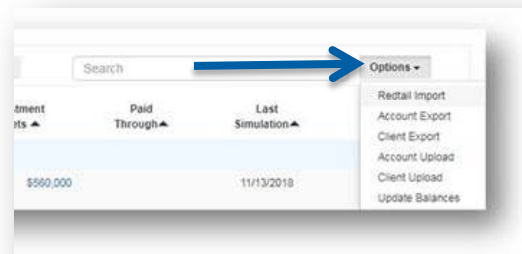


4. You can *import REDTAIL contacts* from the *Integrations Tab* in Preferences when you first set up your integration or from *Options on the Advisor Dashboard* after the initial set-up.
5. *Enter the name* of your newly created client in the *Search* bar. The client must be part of a REDTAIL household. Search for the primary person's name. The clients name should appear in the *REDTAIL Results box*. *Click to highlight the client's name* then *click Import REDTAIL Contact*.

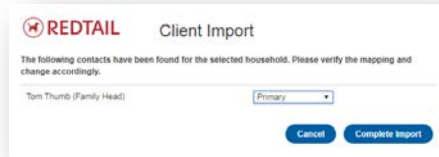
4/5



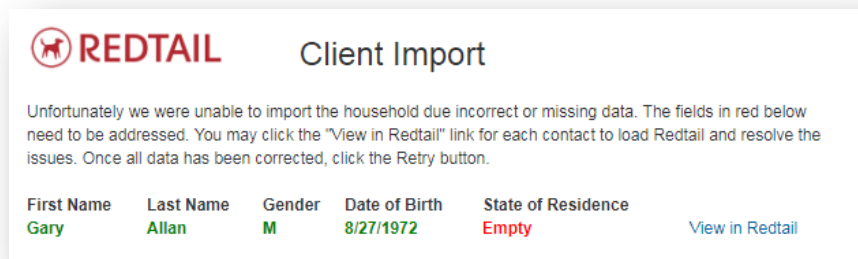
4



6. Verify the mapping of the client names and click *Complete Import*.



7. All households are required to have a *First and Last Name, Gender, Date of Birth, and a State of Residence*. If you are missing required information, you will get a red Empty field notification. *View in REDTAIL* to correct and re-try the import. An email address for the primary person will also import but is not a required field.

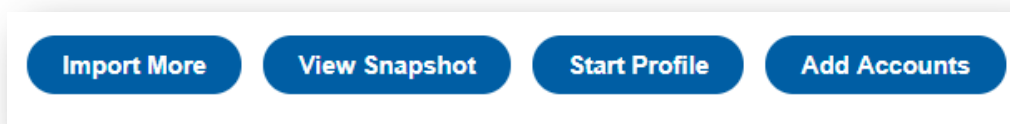


First Name	Last Name	Gender	Date of Birth	State of Residence	
Gary	Allan	M	8/27/1972	Empty	View in Redtail

Congratulations.....

You have successfully imported your first REDTAIL contact.

You can now import more clients, view your new client's snapshot, start a profile for this client, or begin to add accounts for this client.



There will be no Wealthcare-associated cost to you for this enhancement; your only cost will be that of your REDTAIL subscription.

Please email support@wealthcarecapital.com to request to have the integration turned on for you.