

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.

WCAP Advisor ~	Integrations	REDTAIL
Preferences	Manage interestings with outsmall	Please enter your Redtail credentialis below. We will not store y one-time authentication to retrieve a user key to use for future
🗲 Portal Admin	Manage integrations with external partners.	Username
C Logout	,	TestAdvisor11 Password
^		
Delete Selected		Cancel Connect to Redtail

- **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.

riport your contact information from Redta inter at least three characters of the last n	ame of the contact that you would like to import. You can then either				interest of the second second
esignate that this is a new household or m earch	ap to an existing household in GDX360.		Search		Options +
earch Aouse					Rectail Import
edtail Results	GDX360 Destination	tment	Paid	Last	Account Export
Mouse, Mickey - sh Bo Sa	Hole / Household	ets 🔺	Through	Simulation A	Client Export
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		\$560,000		11/13/2018	Client Upload
		********		1111022010	Update Balances
lew selected contact in Redtail					

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

REDTAIL	Client Import
he following contacts have b hange accordingly.	een found for the selected household. Please verify the mapping and
Tom Thumb (Family Head)	(Primary •
	Cancel 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.

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need to be addre	essed. You ma	ay click the "		ncorrect or missing data. Th nk for each contact to load l tton.	
	Last Name Allan	Gender M	Date of Birth 8/27/1972	State of Residence 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.

Import More	View Snapshot	Start Profile	Add Accounts

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

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