



SEI and Redtail Integration

Integrating your CRM with SEI provides you with a more seamless work experience

SEI New ways.
New answers.®



SEI and Redtail have collaborated to bring you a seamless integration experience. Now, through the integration you are able to:

- ✓ [View SEI data in Redtail](#)
- ✓ [Single Sign-On \(SSO\) between Redtail and SEI Advisor Center](#)
- ✓ [Manage client contact information directly from Redtail](#)
- ✓ [Launch transactions from Redtail to SEI Advisor Center](#)

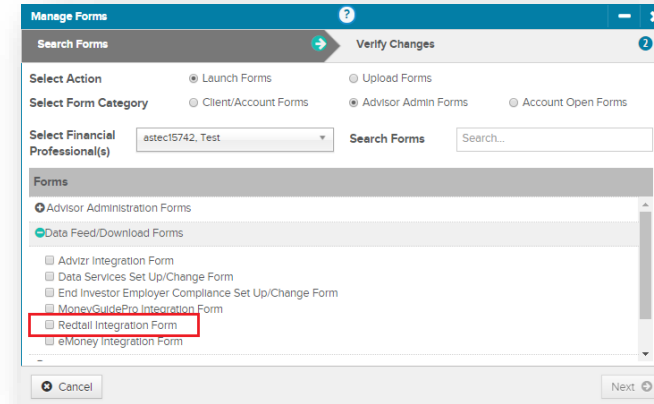
Find out about all of these time saving features



Getting Started

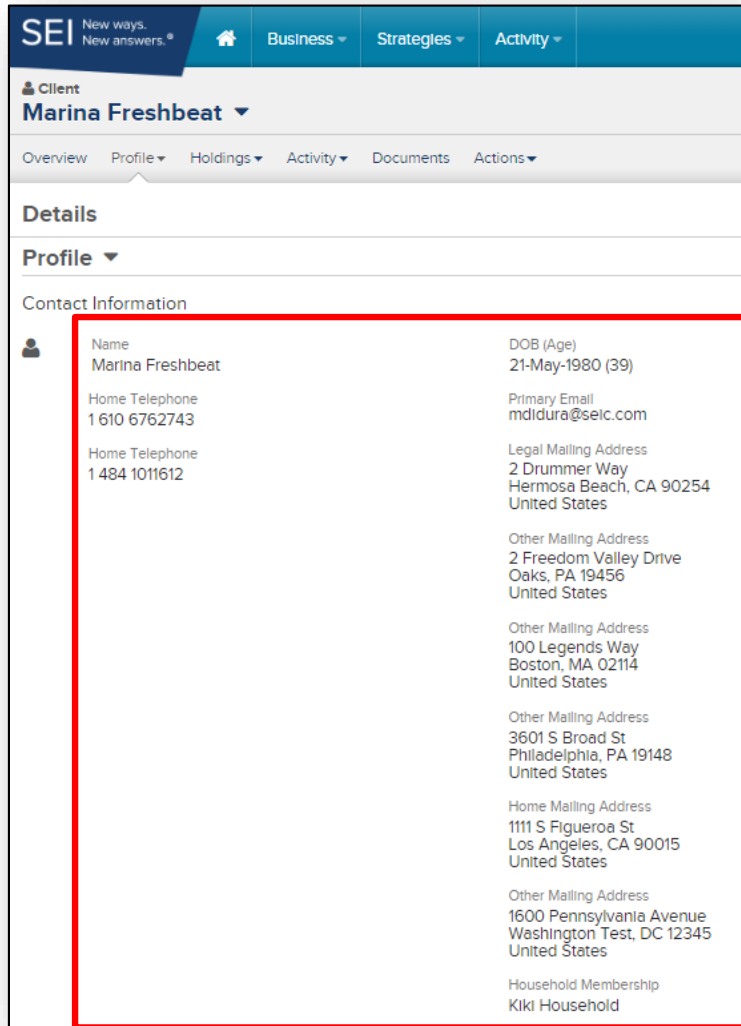
✓ To sign up for the SEI and Redtail Integration, complete the Redtail Integration Form in the Forms menu on SEI Advisor Center in the Advisor Admin portion, in the Data Feed/ Download Forms section.

✓ Once the integration is set, follow these simple instructions to complete the integration:



Data Integration

SEI provides client contact and account information that is automatically updated in Redtail, allowing you to have a clear summary of your client's information in a one location.



SEI New ways. New answers. Business Strategies Activity

Client **Marina Freshbeat**

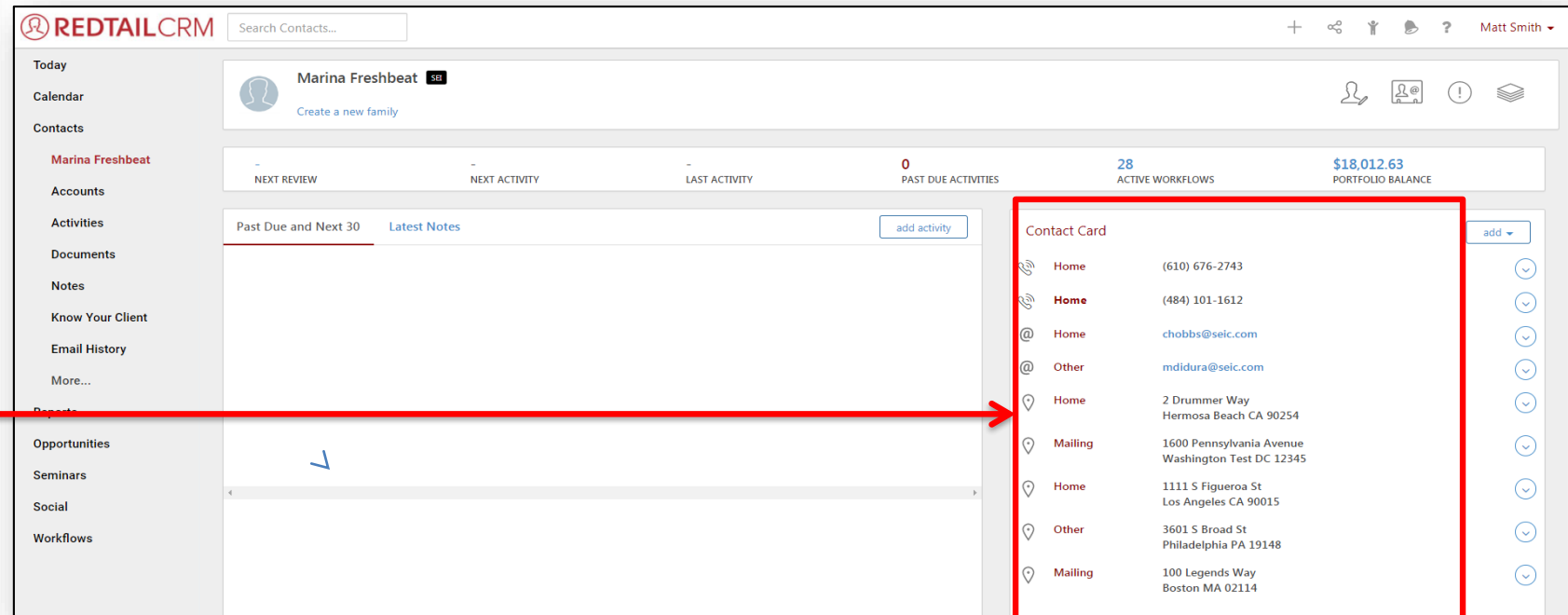
Overview Profile Holdings Activity Documents Actions

Details

Profile

Contact Information

Name	Marina Freshbeat	DOB (Age)	21-May-1980 (39)
Home Telephone	1 610 6762743	Primary Email	mdidura@seic.com
Home Telephone	1 484 1011612	Legal Mailing Address	2 Drummer Way Hermosa Beach, CA 90254 United States
		Other Mailing Address	2 Freedom Valley Drive Oaks, PA 19456 United States
		Other Mailing Address	100 Legends Way Boston, MA 02114 United States
		Other Mailing Address	3601 S Broad St Philadelphia, PA 19148 United States
		Home Mailing Address	1111 S Figueroa St Los Angeles, CA 90015 United States
		Other Mailing Address	1600 Pennsylvania Avenue Washington Test, DC 12345 United States
		Household Membership	Kiki Household



REDTAILCRM Search Contacts...

Today

Calendar

Contacts

Marina Freshbeat

Accounts

Activities

Documents

Notes

Know Your Client

Email History

More...

Opportunities

Seminars

Social

Workflows

Next Review: -

Next Activity: -

Last Activity: -

Past Due Activities: 0

Active Workflows: 28

Portfolio Balance: \$18,012.63

Past Due and Next 30 Latest Notes

add activity

Contact Card

Home	(610) 676-2743
Home	(484) 101-1612
@ Home	chobbs@seic.com
@ Other	mdidura@seic.com
Home	2 Drummer Way Hermosa Beach CA 90254
Mailing	1600 Pennsylvania Avenue Washington Test DC 12345
Home	1111 S Figueroa St Los Angeles CA 90015
Other	3601 S Broad St Philadelphia PA 19148
Mailing	100 Legends Way Boston MA 02114

Data Integration

- ✓ SEI has the ability to suppress account data when integrating with Redtail. If you're receiving SEI account data from another source such as Albridge, Black Diamond or eMoney, SEI doesn't have to send account data to Redtail. We do not presently have the ability to suppress client contact data.
- ✓ When SEI initially delivers data to Redtail, there is the potential for an influx of SEI contact information in Redtail. In most cases, the SEI data integration will simply coexist with already created contact information; however, there are instances in which SEI addresses similar to existing addresses in Redtail will populate for a contact. SEI and Redtail have created methods to manage address and phone number information. This will be covered in a separate video.
- ✓ There are also instances in which data from SEI will not sync with an existing contact creating two contact records in Redtail for the same client. Redtail will attempt to match a SEI client to an existing Redtail contact by matching the client's tax identification number and name. Please see the Redtail CRM Integrations Guide on how to merge contacts.

Single Sign-On

The convenient Single Sign-On functions allow you to move between the homepages of Redtail and SEI Advisor Center, or between a Redtail client record and SEI client profile, all without a separate sign-on process or having to reenter your password.

Click this video to learn more



You no longer have to update your client's contact information on multiple sites. You can update your client's address and phone number information in Redtail and it will automatically update in SEI.

SEI Client Management Information

Click this video to learn more



Transaction Integration

You can launch some transactions from Redtail directly into SEI without having to complete a form.

Launch the following forms:

- ✓ Cash Disbursement
- ✓ Cash Receipt
- ✓ Trade
- ✓ Tax Loss Harvest
- ✓ Strategy Assignment
- ✓ Process Fee Assignment
- ✓ Launch Account Application
- ✓ Launch Electronic Forms

[Click here to learn more](#)



Please see the [SEI and Redtail integration features](#) for additional instructions:

For any questions or more information please feel free to contact The Integration Specialist Team at integration@seic.com. To schedule time to talk [click here](#).

IMPORTANT INFORMATION

Information presented by Independent Advisor Solutions by SEI, a strategic business unit of SEI Investments Company (SEI). Services provided by SEI Investments Management Corporation, a wholly owned subsidiary of SEI.

Redtail is not affiliated with SEI or its subsidiaries.

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