April 2022

Independent Advisor Solutions Integration Services

Digital Account Open Integration with Redtail CRM

Summary

This document serves as a guide for users of the integration between Redtail CRM and SEI's Digital Account Open. The integration allows you to view Redtail contacts that are not linked to a SEI client in Digital Account Open as well as create or modify those contacts in Redtail without having to reenter the Redtail contact information. This guide will provide:

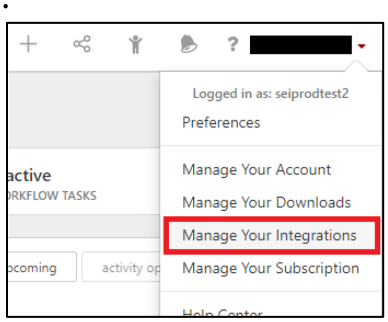
- *Set-Up Procedures*
- *Functional Description*
- *Support Contact*

Set-Up Procedures

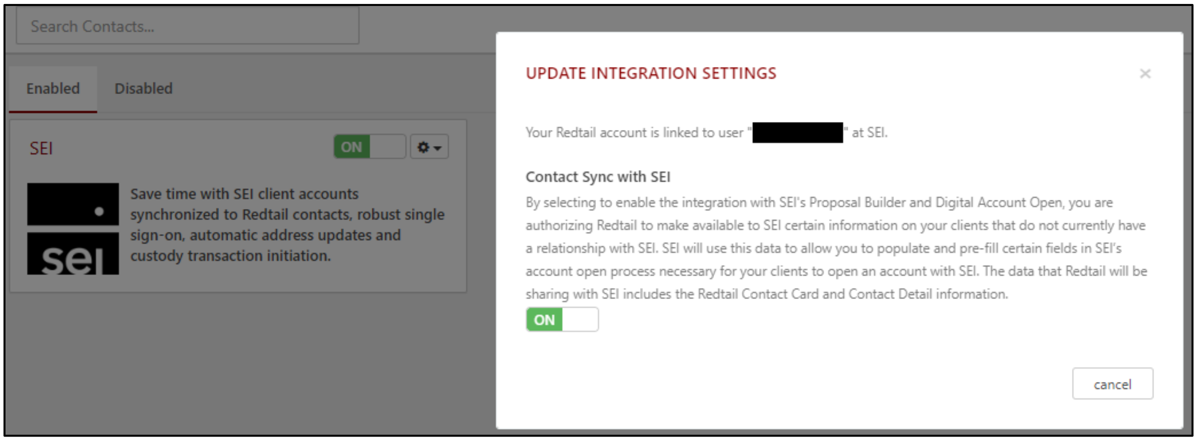
Please complete the following steps to enable the integration.

- If you have not enabled the baseline integration, please complete the following steps in the *Set-Up Procedures* section of [this document](#).

- If you have already enabled the baseline integration, log into your Redtail database and select the dropdown menu next to your name in the top right corner. In the dropdown menu, select the *Manage Your Integrations* option.

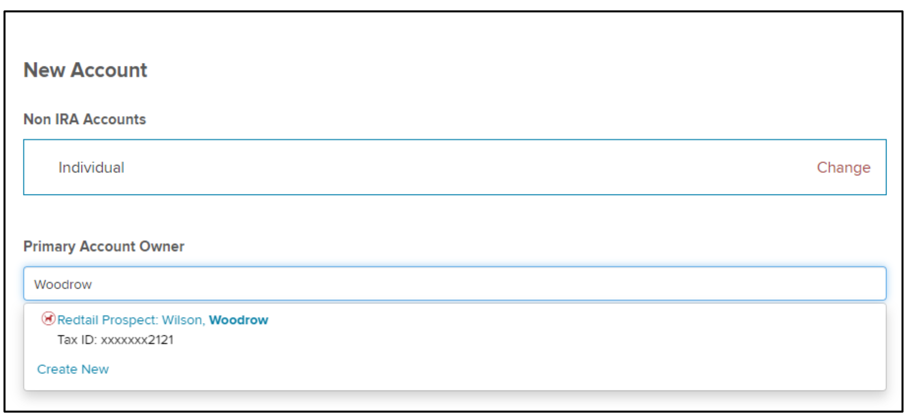


- Navigate to the SEI integration tile and select the dropdown menu with the “cog” icon. Once the *Update Integration Settings* box populates click the contact Sync toggle from “Off” to “On” and click out of the pop-up. Be sure to select the “X” when exiting the *Update Integration Settings* page. Do not select “Cancel”.



IMPORTANT NOTE: Only one user in a Redtail database should enable the integration. If more than one user enables this integration there is the potential for duplicate non-SEI Redtail contact records to populate in the Digital Account Open search bars.

- Once you complete these steps, it will take a few minutes for non-SEI clients to populate in The Digital Account Open search bar. When contacts populate, you will see the Redtail icon to the left of the prospect name indicating that they entry derived from Redtail.



Functional Description

Once you have enabled the integration you all of your qualifying non-SEI Redtail contacts will be visible in Digital Account Open.

In order for a non-SEI contact to populate as a prospect, SEI requires a minimum data capture. The contact in Redtail must have a contact name and either a primary address, phone number or email listed. As an example, if the contact has a name and only a non-primary address, the contact will not populate in Digital Account Open; however, if they have a name and a primary address, they will.

IMPORTANT NOTE: If you are a SEI Advisor Center user with an *administrator* role, Redtail contacts WIL NOT populate in Digital Account Open. Presently, we only support this integration for SEI Advisor Center users with an *advisor, firm all processing or firm all processing oversight* role.

As a best practice, simply have one advisor per firm set this integration.

Additionally, if there are restrictions that assign a Redtail contact to one or more Redtail user who has not enabled the integration, that contact WILL NOT populate in Digital Account Open.

You may also create a new contact, update the contact's information or delete a contact and those changes will apply in SEI.

NOTE: See the FAQ for a list of data points that can flow to SEI.

Frequently Asked Questions

› How do I know if my Redtail contact is a SEI client?

You will know that a contact is a SEI client because there will be the SEI icon to the left of the contact's name. So, contacts without the SEI icon are considered non-SEI client.

› What data points can flow from Redtail into Digital Account Open?
  - Contact first, middle and last name or business name
  - Date of birth
  - Primary address
  - Primary phone number
  - Primary email
  - Tax Identification Number
  - Marital status

› Where can non-SEI contacts from Redtail populate in Digital Account Open?
  - Account owner search
  - Grantor on a trust search
  - Beneficiaries search
  - Third party recipients search

› Why aren't my non-SEI contacts populating in Digital Account Open search capabilities?
  - Presently, we only pull in Redtail contacts with the contact type of individual or business, all other contact types won't flow to SEI.
  - If you have an administrator role on SEI Advisor Center, you do not have access to see Redtail contacts in SEI but you can enable the integrations so advisor(s) in your office can see contacts.
  - There are restrictions on the contact; i.e., a different advisor or team has been assigned to the contact within your Redtail database.