



Frequently Asked Questions

This document was created to answer all questions that were asked during our Redtail Webinar which took place August 10th.

Q) Where can I find the SEI Redtail Integration form?

A) From the Business tab, select the Launch Forms action, select “Advisor Admin Forms” category, and search for “Redtail”.

Q) If I open a new account at SEI, what do I need to do to have this account included in Redtail account integration?

A) If you already have integration between Redtail and SEI, any new accounts will automatically flow into Redtail.

Q) How does the integration work when client has multiple accounts?

A) Redtail can operate with Households, Clients, or Accounts. Redtail will have you select which account you will be submitting the requested item for prior to submission.

Q) How do we link, or import SEI workflows to Redtail workflow templates?

A) Follow the steps on the SEI Redtail Integration Guide to obtain the SEI Workflow templates, automation templates, and mail-merge templates. If you need help thinking about a workflow implementation, use the [SEI Growth Lab Scale with Ops Toolkit](#), or contact your business development professional to get on the waitlist for our Scale with Ops+ workflow implementation program.

Q) What SEI activities can be tracked within Redtail?

A) The SEI workflows that will allow you to launch and track activities directly are Cash Disbursement, Trade, Tax Loss Harvest, Strategy Assignment (through Modify Strategy Assignment only at this time), and Process Fee Assignment.

Q) Are the workflows generated by the action or do I need to build a template in workflows?

A) Workflows can either be generated by the action or have the action be embedded within an existing step in your workflow. The SEI workflow templates already have suggested actions built into certain steps.

Q) If we already have our accounts feed into Albridge, if we turn on Redtail integration, will this cause duplication of accounts in Redtail and/or Albridge?

A) There is a potential for this to occur if there are two feeds established. We have the ability to exclude positions in the Redtail feed in order to avoid duplicate data. There are various ways to approach this configuration, so feel free to contact integration@seic.com to determine the best approach for you and your firm.

Q) Does your BD have to approve the Integration?

A) No, broker dealer approval is not needed to establish the SEI-Redtail integration.

Q) For clients with multiple SEI accounts (qualified, non-qualified), does Redtail default to any certain type of account when distributions are requested?

A) Redtail will have you select which account you would like to have the disbursement come from.

Q) Where do the SEI confirms get saved in Redtail?

A) There is currently no automated way to save SEI confirms in Redtail. The integration provides you quick access to the activity details by selecting the hyperlink under the “Status” of the workflow. If you typically save the details of the activity confirm screen to your CRM as part of your process today, we recommend using the “Quick Add” action in Redtail to add notes to the client page while processing within a workflow.

Q) Do we have to use workflows in order to have any benefits from integration?

A) No, the workflows are only one of the features of our SEI-Redtail Integration, but do not have to be used.

Q) Is there an additional cost for this service?

A) No, there are no additional cost for advisors utilizing SEI solutions.

Q) Can I create workflow first then do the transaction at SEI.

A) Yes, you can either process the transaction so that a workflow launches for the remaining steps after the transaction is processed OR launch the workflow or delegate the transaction within the needed step(s) of the workflow. You would need to deploy the SEI automation templates to your Redtail database, then edit your existing workflow template to “edit integration” to any steps you wish to add the transaction integration to.

Q) Is the integration bi-directional?

A) Yes, we have a client and prospect sync within our SEI account open and proposal applications, and we also have client contact information flowing from Redtail to SEI throughout the day. Single Sign On between Redtail and SEI is also bi-directional.

Q) If I change an address in SEI does it also update Redtail?

A) Yes, address updates made in SEI Wealth Platform will populate in Redtail overnight. If there is a mismatch, you will see two addresses within Redtail that you may choose to merge or overwrite. The Redtail generated address would be removed and would not repopulate in Redtail unless a subsequent update to the address is made. Complete this by selecting the Redtail address you want to overwrite and then select the “Use SEI address” radio button. To proceed, select the merge address button at the bottom left corner of the page.

Q) It looks like there are 6 SEI automation templates. Are those the only ones available or are there ways to customize others?

A) There are more than 6 SEI automation templates available. If you previously participated in an SEI workflow implementation program, you likely had all of the automation templates available. You may be able to contact Redtail support to re-deploy the remaining SEI automation templates.

Q) Does the Activity ID number automatically copy over to the notes section in RedTail?

A) The activity id will not be saved in the client page of Redtail, but there will be a link within the workflow that will lead you to the SEI Advisor Center to view the activity directly. We recommend using the “Quick Add” action in Redtail to add notes to the client page while processing within a workflow.

Q) If the integration is turned on and it can't find a contact to feed too, will it create new client record to complete the feed?

A) Yes, if the SEI account cannot be matched, a new account profile will be created in Redtail. Any client that is linked to SEI will have an SEI logo next to their name in Redtail.

Q) How do we get the SEI workflows into our Redtail?

A) You first need to submit a ticket via Redtail or email SEI to deploy the custom workflows. Once the integration to Redtail is established, the individual Redtail automation templates will need to be turned on. This can be done in Redtail via the “Manage My Account” settings. For detailed information, please refer to our Redtail Workflow Integration Guide accessible via the Advisor Desktop Help Menu.

Q) Are we able to edit SEI workflows in Redtail?

A) Yes, you are able to edit or clone workflows directly in Redtail. This can be done in Redtail via Manage your Account and selecting Workflow Templates. There will be a downward facing arrow next to all Workflows which will allow you to edit or clone the selected workflow.

Q) How often does Redtail sync address data with SEI if a change is made?

A) Address syncing is live and should reflect in Redtail within a few minutes after the change is complete in Redtail. If the address is first changed at SEI, it will reflect in Redtail the following business day.

Q) Do we have access to what these workflows consist of?

A) SEI Workflow Library >>> [Workflow Library | Advisor Briefcase \(seic.com\)](#)

Q) Will the activity number show in Redtail?

A) Yes, if you select the hyperlink of the active workflow you are able to open up the activities details page and are able to see the activity ID.

Q) Will SEI be updating any of their workflows in real time since so much has changed in processes over the years?

A) We plan on continuing to maintain our workflows with Redtail for the foreseeable future.

Q) You mention that SEI reports account closures to Redtail...could you elaborate on details

A) SEI Data Feeds to Redtail include all Client and Accounts with their applicable status. SEI closed accounts will still be delivered to Redtail if the Integration is still enabled.

Q) If you have outcomes built into the workflow, will that block the automation of it moving to the next step automatically?

A) Depending on the workflow order, there is a potential for a workflow to pause for approvals, follow up, or assignment. It is important to build custom workflows in the most efficient manner for your business. We encourage you to reach out to SEI for a deeper discussion on building workflows.

Q) I have Redtail but I don't see SEI as an integration option. I see all kinds of 3rd party integrations, none of which I use, as options. Why isn't SEI showing?

A) Redtail display active integrations you can toggle. Prior to SEI showing in the screen, you must submit the Redtail Integration form so SEI can enable the feed. Once complete, SEI will display in the Manage Integrations screen in Redtail, and you will need to complete the remaining steps from the Integration guide

Q) Can I integrate SEI if I already get a data feed from my current custodian?

A) All situations are unique, but in most cases, there would be no issues having multiple data feeds from custodians established. You can always contact integration@seic.com to confirm if your scenario would allow for multiple data feeds.

Q) Our SEI Integration shows “On” but we don’t have the option to select SEI Integration for a client that has an SEI account at the top.

A) If the Integration is showing as “On” in Redtail, but data is not showing, you may need to complete the integration setting in Redtail by selecting the gear icon next to the SEI Integrations page in Redtail and selecting “Settings” in the dropdown. When prompted, you should see your SEI User ID listed. If it is not listed, you must complete the integration by selecting “Link with SEI Platform”. For further troubleshooting, please contact Integration@seic.com.

Q) Will the integration be available for all users or do you have to fill out that form for each user

A) Yes, once the integration is established it will be available to all users utilizing the same Redtail license/database.

Q) If i do not have my own SEI login, can my advisors login be linked to my Redtail?

A) It is best practice to link SEI and Redtail profiles across like to like parties.