

Independent Advisor Solutions Integration Services

SEI Wealth Platform & Wealthbox CRM Integration Guide

Summary

Type	Description
Set-up Procedure	Follow these one-time steps to complete the integration between Wealthbox and SEI
SEI Data	Ability to view all SEI accounts and holdings in Wealthbox through a daily data feed
Single Sign-On	Ability to navigate between SEI and Wealthbox without having to log back in to either system
Support	For assistance with you SEI and Wealthbox integration, please contact the Integration Specialist Team at integration@seic.com

Set-up Procedure

Authorization

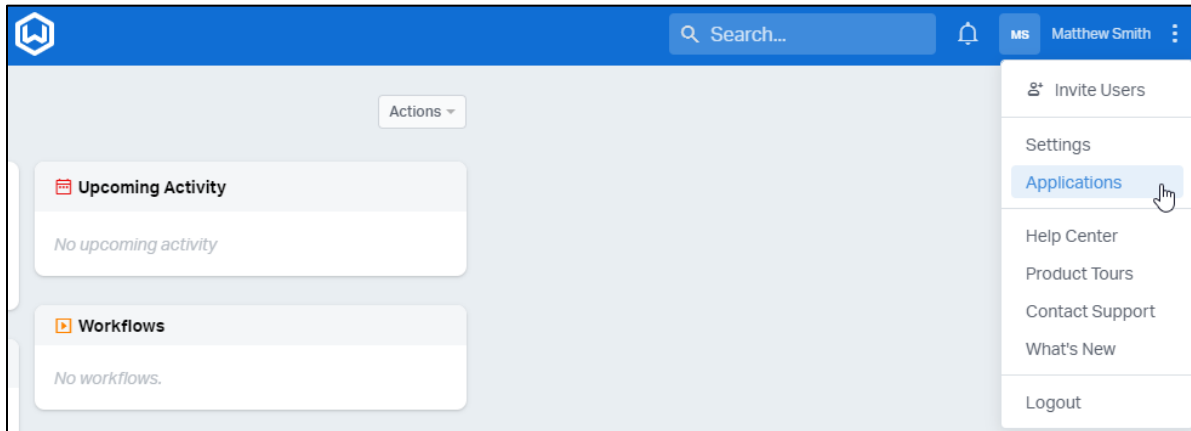
To initiate the integration between Wealthbox and the SEI Wealth Platform, the first step is to complete the Wealthbox integration form which authorizes SEI's connect to Wealthbox for your firm.

- › The Wealthbox integration form can be obtained by navigating SEIAdvisorCenter.com, and launching the *Manage Forms* page under the "Business" menu.
- › Once on the *Manage Forms* page, select the *Advisor Admin Forms* radio button, select the *Data Feed/Download Forms* drop down and select the *Wealthbox Integration Form*.
- › Complete the form and submit. Once the form is complete, a member of The Integration Specialists will contact you regarding next steps.

SEI just established your integration with Wealthbox, now what?

Once your integration form has been processed and you've been contacted by The Integration Specialist Team, please follow the below steps one-time steps to enable the integration features.

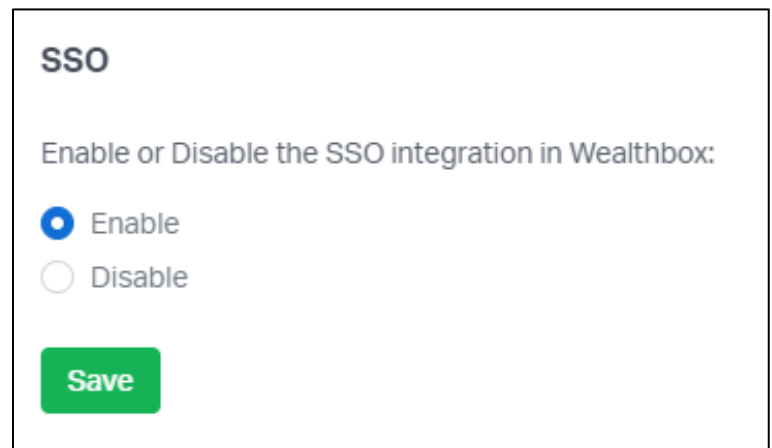
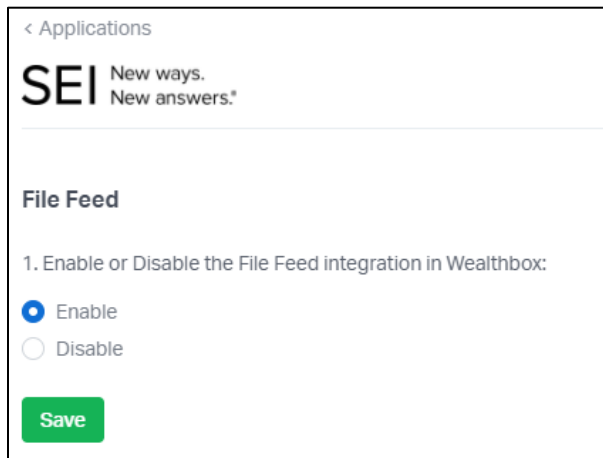
- › In Wealthbox, navigate to the menu at the top right hand corner of the page and select *Applications* from the dropdown menu.



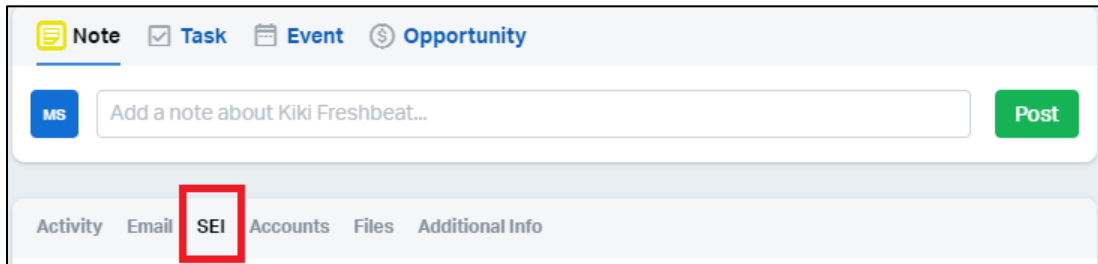
- › In the Applications menu, find the SEI icon and select the Settings button.



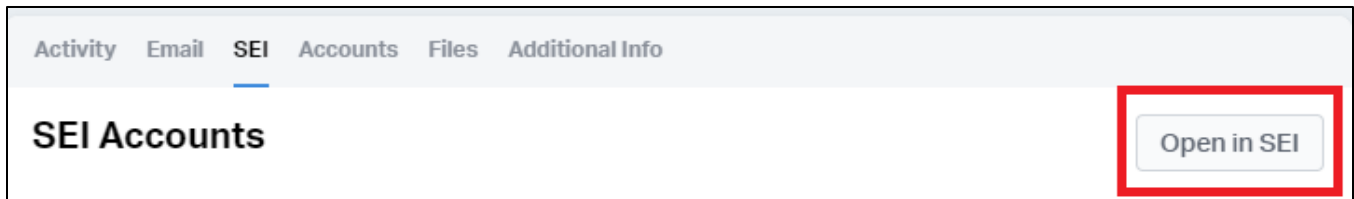
- › Under the *File Feed* header, select the *Enable* radio button and select the Save button. Once you select to *Enable* the *File Feed*, the option to enable single sign-on (SSO) will populate. Again, select the *Enable* radio button and select the Save button.



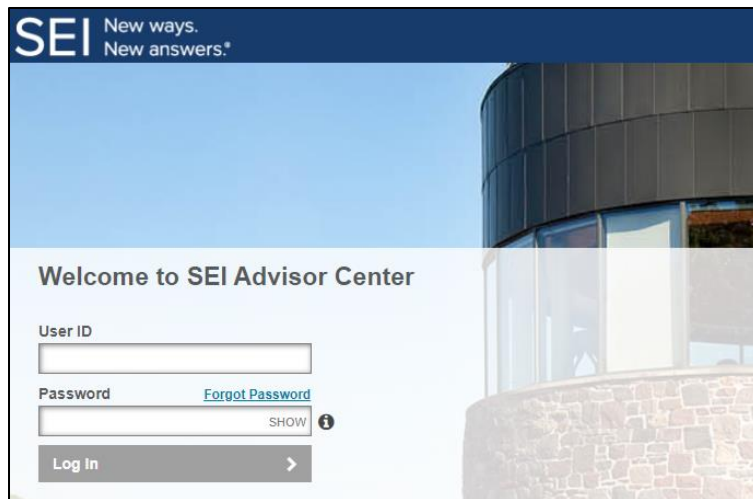
- › Navigate back to any contact record. You will see SEI as an option on the contact record.



- › Select the *Open in SEI* button.



- › Log into SEI Advisor Center and your integration between SEI and Wealthbox is complete.



Things to Know

- › Make sure that you check the *Remember Me* box. This allows you to keep the integration set without always having to reenter your password.
- › Just like logging into SEI Advisor Center directly, your password to SEI Advisor Center will expire every 90 days.
- › There is a one to one relationship between your Wealthbox CRM and your SEI Advisor Center user ID

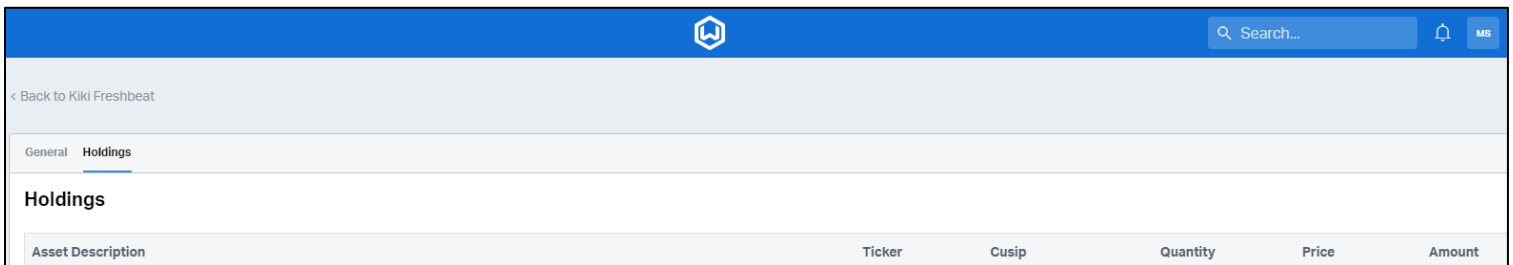
Integration Features

SEI Data

This function gives you the ability to view all SEI accounts and holdings for those accounts in Wealthbox through a daily interface file.

To access the account information from SEI available, navigate to a contact in Wealthbox and select the SEI tab. Once on the SEI tab, all accounts under that client will populate.

To see the holdings for an account, select the name of account in the contact record and navigate to the Holdings portion of the page,



Asset Description	Ticker	Cusip	Quantity	Price	Amount
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Things to Know

- › If you do not see the SEI option on a contact in Wealthbox, this is because a SEI client did not link with a Wealthbox contact record. In order for the SEI client to link with Wealthbox contact, the taxpayer identification number between the SEI client and the Wealthbox client must be the same and available on both SEI Advisor Center and Wealthbox.

Single Sign-On (SSO) Integration

This feature is the ability to navigate between Wealthbox and SEI without having to log back into either system. SEI and Wealthbox have established single sign-on between a Wealthbox contact and a SEI Advisor Center client. To initiate the SSO, navigate to a contact record in Wealthbox.

Once on the contact record, select the SEI tab and then select the *Open in SEI* button. This will drop you directly into the context of the SEI client from Wealthbox contact in which you were working.

Things to Know

- › The first time you log into SEI Advisor Center from Wealthbox, you will not be dropped in the context of the SEI client, you will be dropped on the SEI Advisor Center homepage. Going forward will be dropped in the context of the SEI client from the Wealthbox contact you selected.

Support

For any questions regarding the SEI and Wealthbox integration, please contact the Integrations Specialist Team at integration@seic.com.