



Workflow Integration

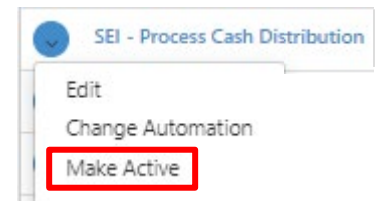
This feature offers the ability to manage SEI transactions within Redtail through automated workflows and activity updates from SEI. This includes activities for cash disbursement processing, launching a trade, tax loss harvesting, strategy and fee assignments derived from Redtail.

Please note: For firms utilizing SEI solutions, there are over 40 customizable workflow templates, 10 automation templates, and several mail-merge template examples that can be deployed to your Redtail database for operational usage. Email integration@seic.com to obtain the templates, or use the instructions below to integrate your current workflows.

How to set the workflow integration

Once the integration to Redtail is established, The Redtail automation templates will need to be turned on. These automation templates are what launch a workflow every time one of the above mentioned transactions is initiated.

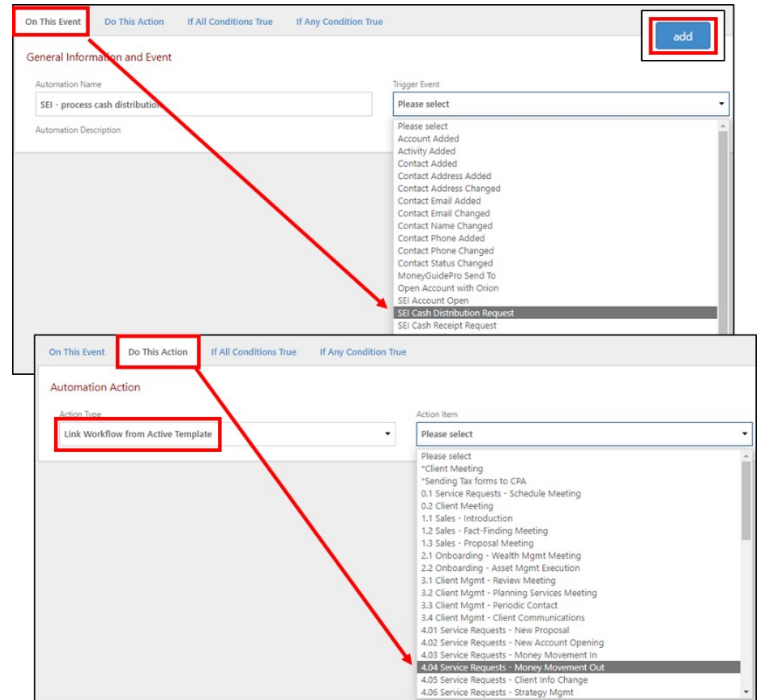
- › Click the **arrow next to your name** in the right-hand corner of Redtail to expose a dropdown menu
- › Select **Manage My Account**
- › Click on **Automation Templates** under “Manage Templates”
- › Identify which automation templates are marked “inactive”
- › Click the down arrow next to the first inactive template on the left-hand side
- › Select **Activate** from the dropdown
- › Complete this for all inactive automation templates needed



How to create an automation template

Submit a Redtail Support ticket to deploy the SEI automation (and potentially workflow templates) to your database OR follow instructions below to create the automations on your own.

- > Click the arrow next to your name in the right-hand corner of Redtail to expose a dropdown menu
- > Select **Manage My Account**
- > Click on “add”
- > Add a unique **Name** as well as a **Trigger Event** as shown in the picture in the “On This Event” tab
- > Add an **Action Type** “Link Workflow from Active Template” and an **Action Item** of your active workflow template for the necessary Trigger Event. **Please note: you will need an automation template for every SEI action to be connected to a unique workflow.**

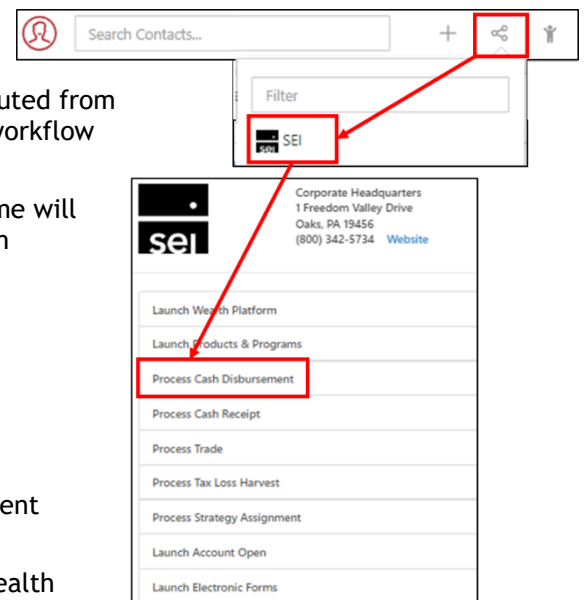


Testing Instructions and Workflow Experience

In order to test the workflow automation, the transaction must be executed from Redtail. The explanation below will describe the experience using the workflow integration.

As an example, we’ll use cash disbursement workflow. The same outcome will occur for any of the other transactions that will initiate a workflow from Redtail to SEI.

- > In Redtail, navigate into the client record with SEI accounts
- > Click the **Integrations** button in the top menu bar
- > Navigate to **SEI** within the list of integration partners
- > Select **Process Cash Disbursement** which will open up SEI’s disbursement screen
- > Complete the information and **submit the disbursement** on the SEI Wealth Platform



> Click the hyperlinked number above “Active Workflows” on the client menu at the top



> A new **Money Movement Out (or your workflow)** workflow should have automatically launched

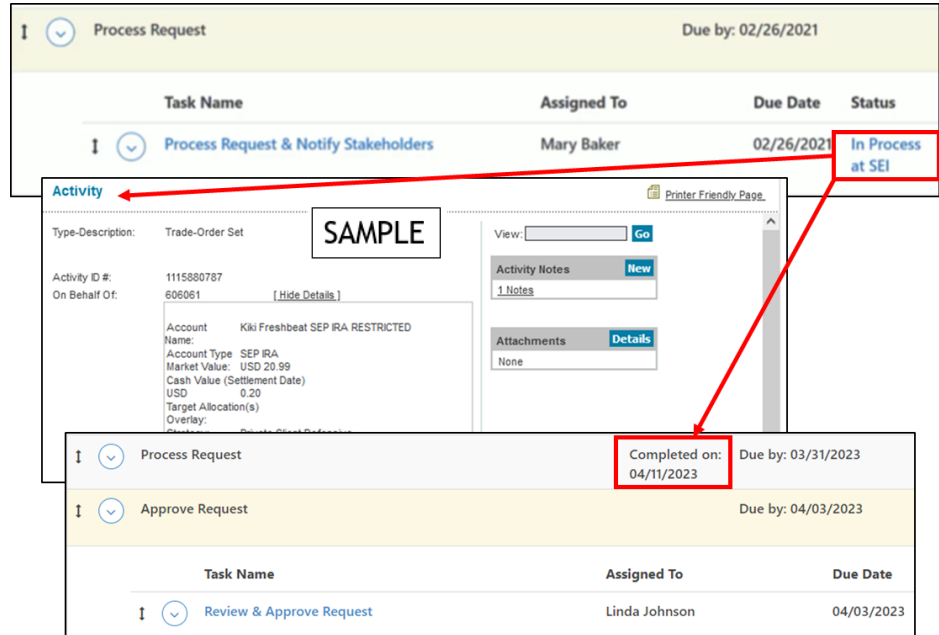
> The status of the workflow step will automatically update to **In Process at SEI** within a few minutes of launching that workflow

> The workflow step will continue to **automatically update with future statuses**

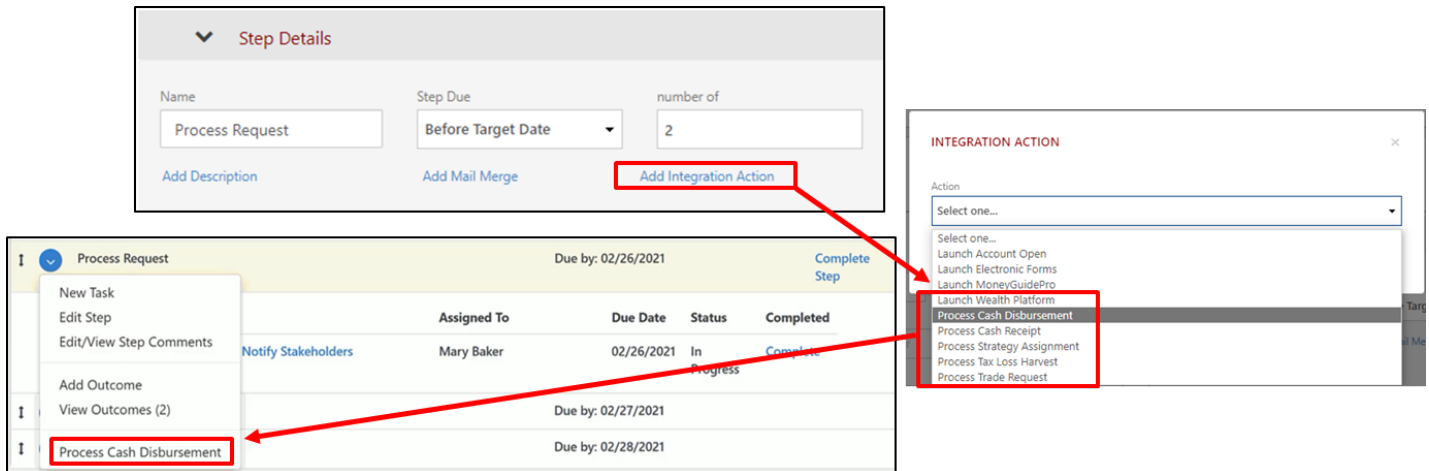
> At any time the **hyperlinked status** will provide more detail about the transaction at SEI

> SEI automatically completes the **first workflow step** once the transaction is successfully executed

> The user then **completes the last workflow step** manually in Redtail



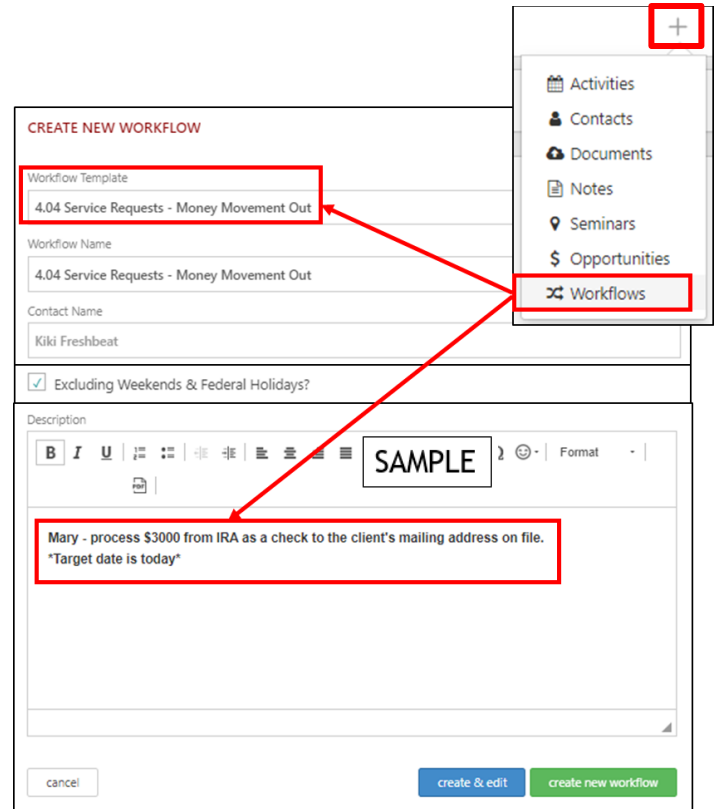
NOTE: the workflow integration can be used to delegate tasks to other team members instead, within the active workflow. You will need to “Add Integration Action” to the workflow template as shown:



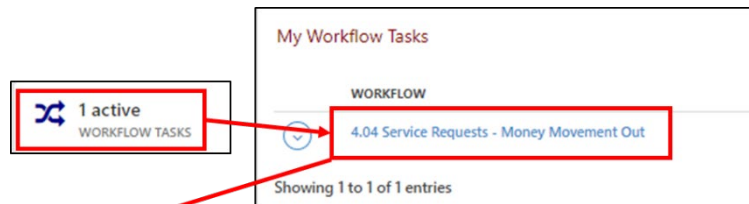
How to delegate instructions and workflow experience

Continuing with the cash disbursement example, below are the steps to delegate a task to team member.

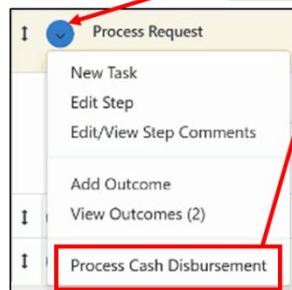
- > Click the “+” quick add button in the top menu bar
- > Click on the **workflow option** in the list
- > From the **Workflow Template** dropdown choose your **Money Movement Out** workflow and fill out any additional details needed
- > **Under description, type any instructions** for the team member assigned to the task



- > The team member should be notified that they have a **new task on their My Workflow Task** dashboard



- > The team member assigned would **view the task and the instructions**



- > The team member assigned can select the **down arrow to the left of the Step**
- > When the team member assigned selects **Process Cash Disbursement** it will open SEI’s disbursement screen
- > The team member assigned would then fill out the information and **submit the disbursement** on SWP



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