eMoney Integration Set-Up & Overview.

Summary

Type	Description
Set-Up Procedure	Once your eMoney integration has been established, follow the below procedures to set the integration
SEI Data	Ability to view SEI accounts, addresses, holdings and transactions in eMoney through a daily data feed
Single Sign-On (SSO) Integration	Ability to navigate between SEI Advisor Center and eMoney without having to log into either system

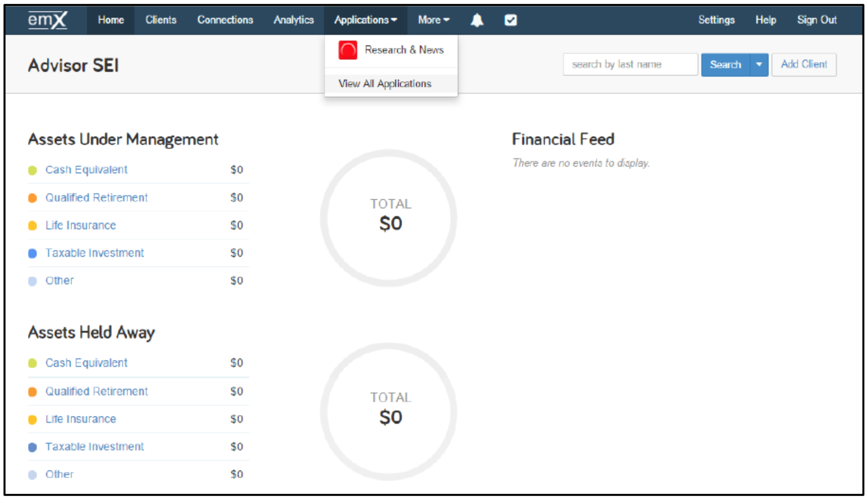
Set-Up Procedure

SEI has established your integration with eMoney, now what?

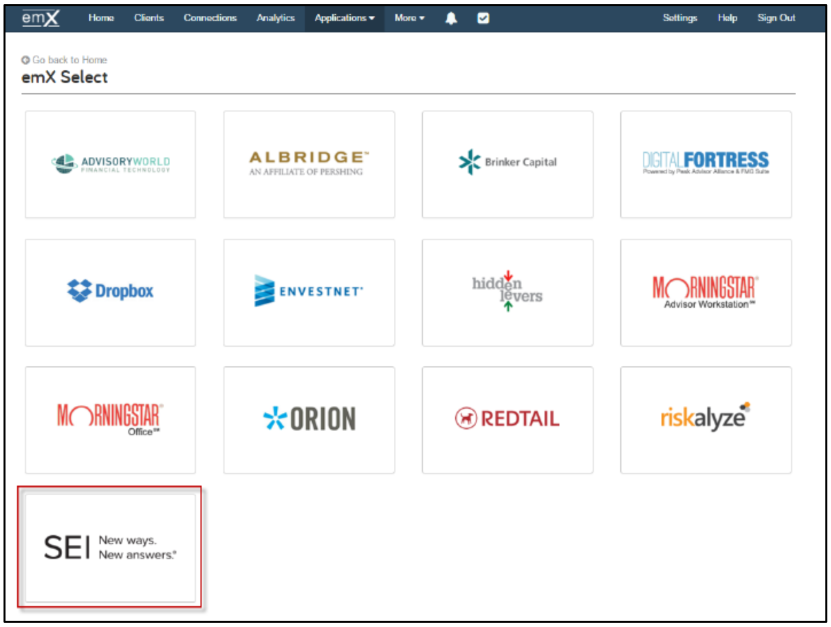
Once your eMoney integration has been established, a representative from SEI will contact you with a Request Id and an Advisor (Rep Id) and also make you aware that you can set the Single Sign-On (SSO) between SEI Advisor Center and eMoney. These are two critical numeric sequences needed to connect your SEI data in eMoney.

Below are the steps to set the SEI integration in eMoney:

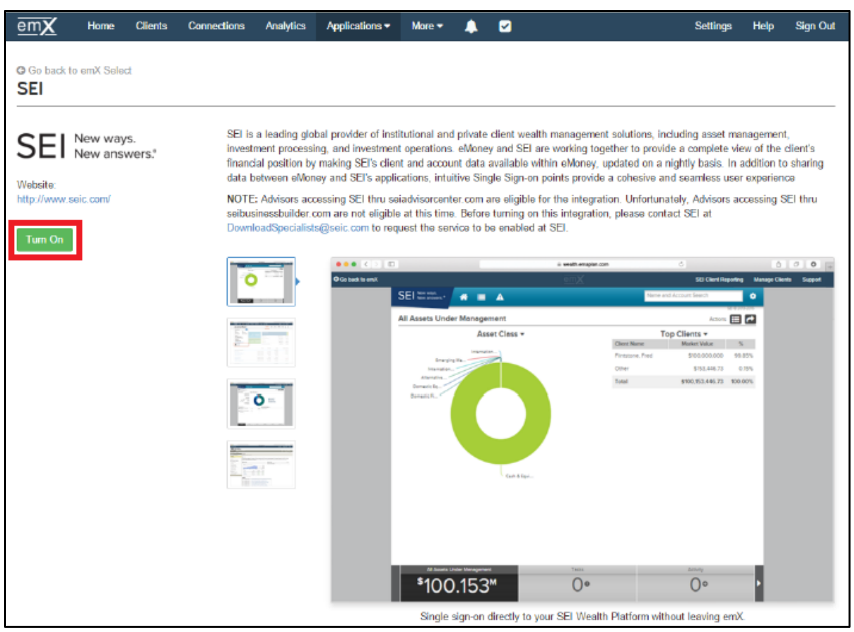
› Navigate to the *Integrations* dropdown menu and select *View All Integrations*



› Once in the *Integrations* menu, select the SEI tile.



› Select "Turn On"



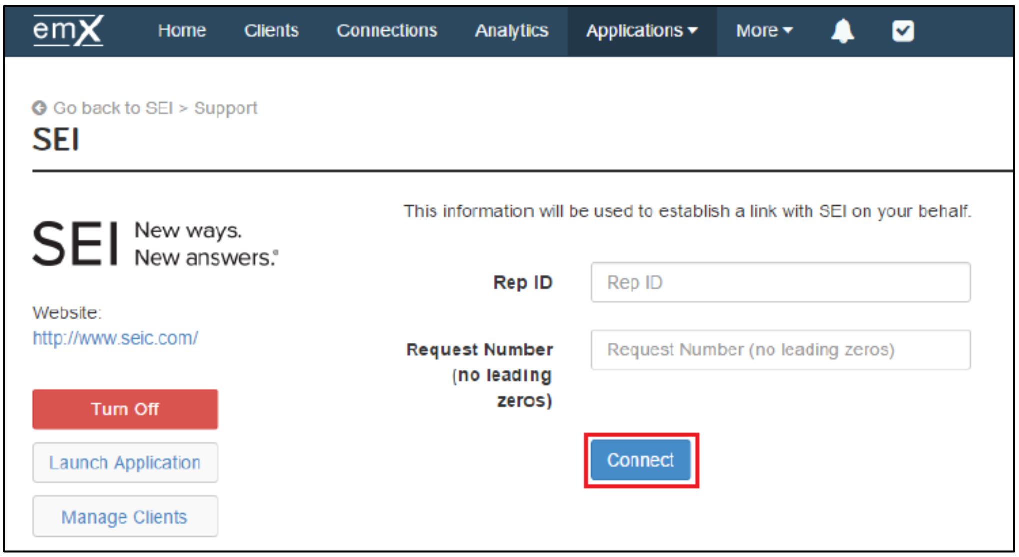
› A new tab will open bringing you to the SEI Advisor Center login page. Enter your SEI Advisor Center credentials. This will enable you to SSO from eMoney to SEI.

- After you enter your username and password on the login page and move to the multi-factor authentication page, make sure you check the box for "Register this device." This allows you to keep the integration set without always having to reenter your password.

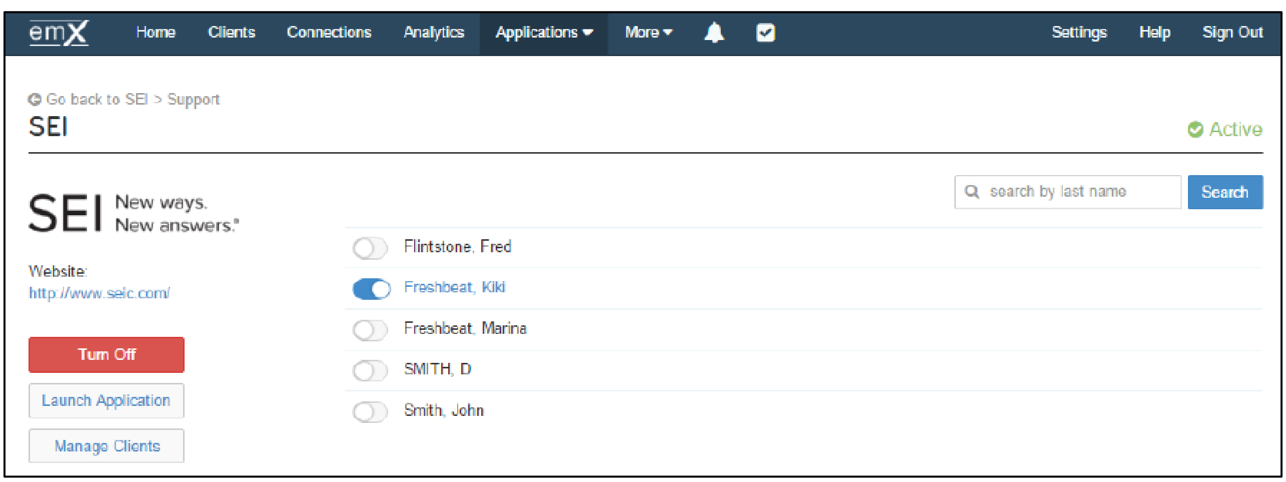
NOTE: You will have to update your password every 90 days.

- Navigate back to eMoney and refresh the page. You will then be able to enter the Rep Id and Request Id provided to you by the SEI service representative.

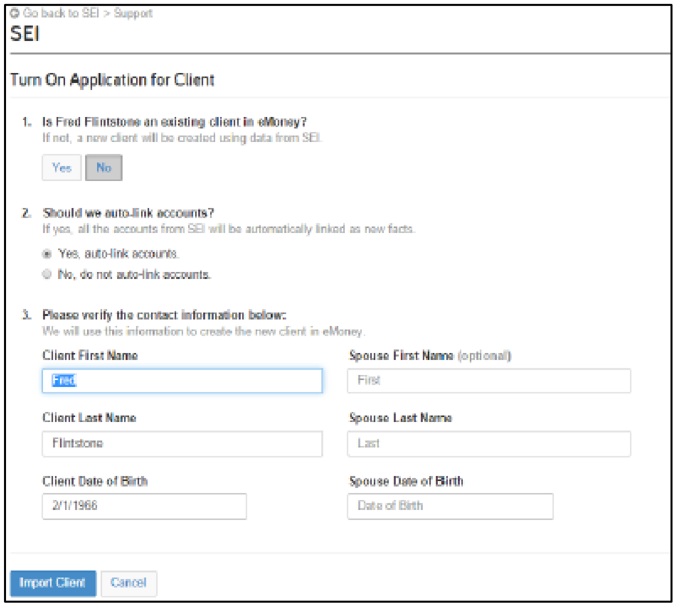
- After entering your credentials, select "Connect". This will enable you to manage your SEI clients within eMoney



- The list of your SEI clients will populate. Click on the toggle bar next to the client name. This will bring the client information provided by SEI into a workflow and create a new client in eMoney.



› You will also be prompted to bring over accounts if you wish to do so.



SEI Data

This function gives you the ability to view SEI accounts, addresses, holdings and transactions in eMoney through a daily data feed.

Within eMoney, you can bring in SEI data for specific clients or accounts.

› To bring in additional SEI accounts data in eMoney, navigate to *Connections* dropdown from the menu bar at the top of the page and select the *Connections for Advisors*.

› Select the SEI tile.

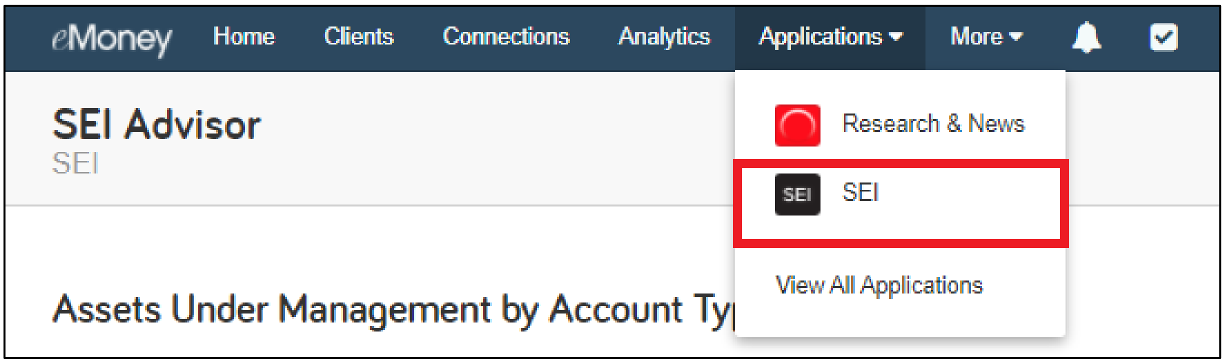
› A list of clients with accounts at SEI will populate. Select the additional client data you would like to bring into eMoney. Choose to import a new client or select a linked client to find new accounts.

  NOTE: You may also link SEI account by the client's tax identification number. It is recommended that you link via the tax identification number so that all accounts under the tax identification number populate within eMoney.

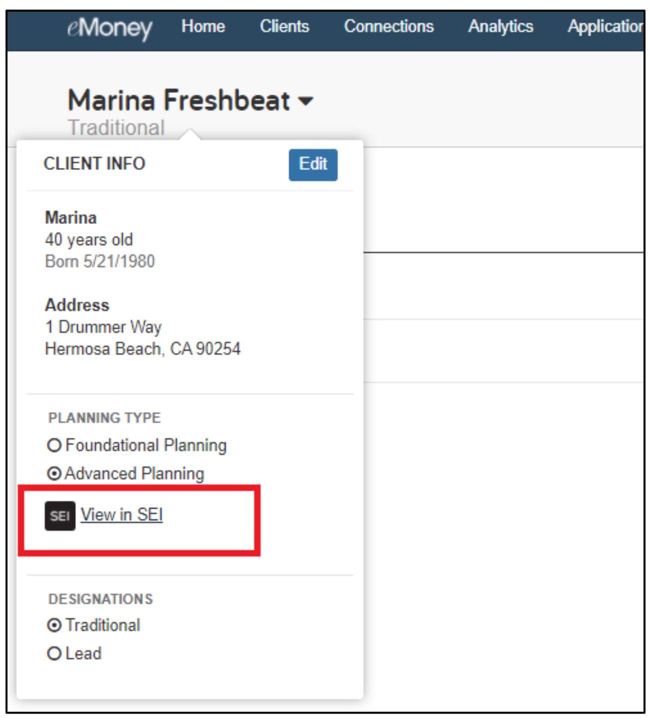
Single Sign-On (SSO) Integration

This feature gives you the ability to navigate from eMoney to SEI and vice versa without having to remember your user ID and password for either platform. Once you've established the integration between SEI Advisor Center and eMoney, follow these simple steps to SSO between platforms

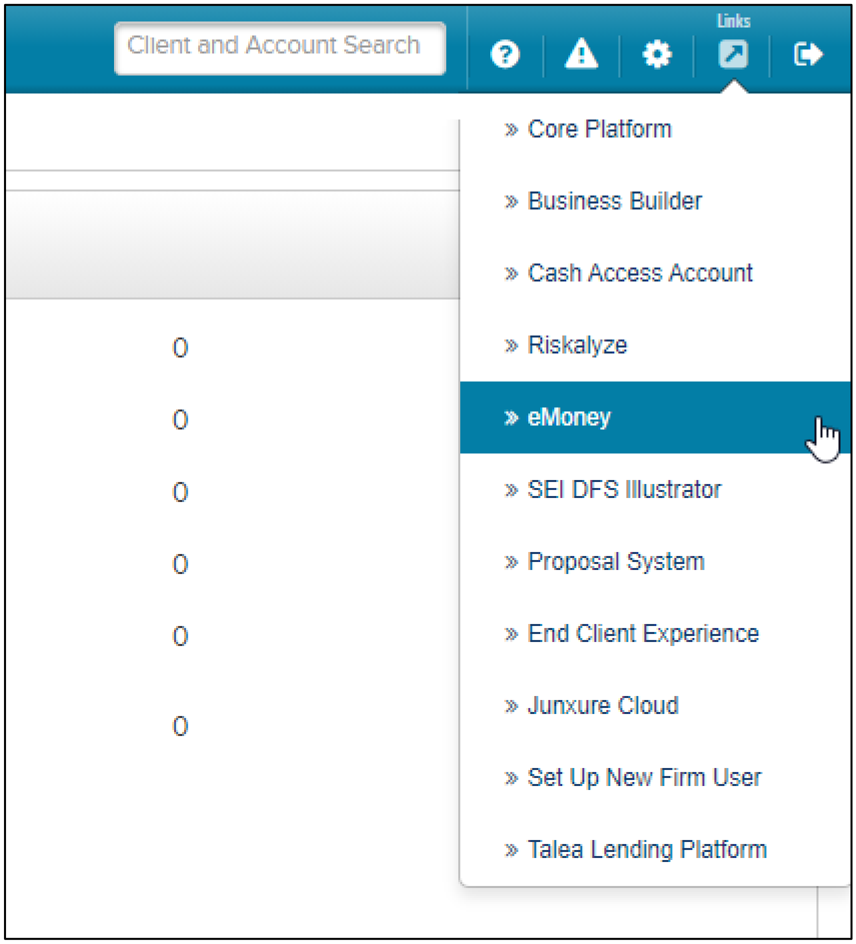
› To SSO from eMoney to SEI Advisor Center, navigate to the *Integrations* dropdown menu and select SEI.



› Additionally, if you are in the *Client Overview* page for a specific client, select the dropdown next to their name and then select the *View in SEI* option under their name. This will also SSO you onto SEI Advisor Center's homepage in a new tab on your browser.



› Finally, you can SSO from SEI Advisor Center into eMoney.by access the “Links” menu or the “Quick Links” box. Select the eMoney option for the dropdown. A new tab will open onto eMoney’s homepage.



Support

For any questions regarding the SEI and eMoney integration, please contact the SEI service team