emX

INTEGRATION UPDATE

FEATURING

REDTAIL

Questions and Answers

Questions and Answers

Q: What is Redtail?

A: Redtail Technology is a leading provider of web-based Client Relationship Management (CRM), paperless office and email archiving solutions in the financial services industry. Easily affordable, easy to implement and offering integration with many of the industry's most widely-used applications, Redtail is committed to providing financial advisors with the core technologies that drive their day-to-day operations.

Q: I have a subscription to Redtail. What features will be available to me as part of this integration with emX?

A: Users will be able to synchronize information—such as client contact information, notes and tasks—between Redtail and eMoney, eliminating the need for duplicate data entry and helping you stay organized in your client relationship management efforts. Convenient single-sign on access to Redtail through the emX platform, as well as the ability to easily import new clients into emX directly from Redtail, streamlines your day-to-day operations.

Q: I am currently not a Redtail subscriber. Are there any features available to me?

A: No, in order to use the integration's features, you must be a Redtail subscriber. Access to Redtail is limited to shared clients of Redtail and eMoney, and based on individual enterprise preferences. eMoney users who do not have a Redtail subscription and are interested in signing up should contact Redtail at sales@redtailtechnology.com or call 800-206-5030.

Q: How do I access the integration?

A: From the emX Advisor Homepage, find the Applications tab and click ***Setup*** to access the emX Select Page. Here, you will be able to conduct the initial sign-in for all the integration platforms available to you. After this initial sign-in, you can navigate to your integration at any point by clicking ***Applications*** and selecting Redtail.

Questions and Answers

Q. When will this integration be complete and ready for use?
A. The integration is already live! We would like to note however, that Redtail users who have upgraded to Redtail's new Tailwag platform may experience some problems. This is a known issue and will be resolved shortly.

Q. Will accounts from Redtail automatically integrate into emX?
A. When a client is imported or linked into emX, their accounts are automatically integrated at that time. If you add a new account to an existing Redtail client that has already been imported or linked, you will have to manually add that account into emX.

Q: If I add a new client in Redtail, will it automatically show up in emX?
A. No, when a client is added into the Redtail system, it will show up under the client list within the Redtail connection in emX. From there, you can choose to import or link that client into emX.

Q. I have a husband and wife in Redtail. Am I able to link or import them both?
A. In this phase of the integration, linking/importing is limited to clients. When a client is linked or imported, their spousal contact information will be automatically integrated however, spousal accounts must be integrated manually. You can manually integrate them by clicking into your Redtail connection on emX Select, selecting ***Accounts*** and then clicking the ***Add*** button next to the client whose spouse you'd like to integrate. This will open a modal that will allow you to search for the spouse. Once you've found the spouse, click ***Next*** and the spousal accounts will be integrated.

Q. Will the notes feature work for both the client and spouse?
A. Currently, the notes feature only works for clients.

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Q. Are we able to only link/import specific clients or must we link/import all our clients?
A. All clients must be linked individually, so you have the ability to link or import whichever clients you choose.

Q. Is there anything we need to do to link clients that already exist in both emX and Redtail?
A. For clients that exist in both systems, but have yet to be linked, you should go to your Redtail connection on the emX Select page and click ***Clients*** to display your client list. Choose the ***Link*** option to then link the two existing clients together.

Q. If I manually add an account into emX will it import into Redtail?
A. No, account data does not flow from emX into Redtail. Only notes, tasks and certain contact information flows bi-directionally.

Q. What is the full list of contact information fields that flow both ways?
A. The contact information fields that flow both ways are:

- Client First Name
- Client Last Name
- Client DOB
- Client Gender
- Client Marital Status
- Client Address 1
- Client Address 2
- Client City
- Client State
- Client Zip
- Client Home Phone Number
- Client Fax Number
- Client Cell Phone Number
- Client Email Address
- Spouse First Name
- Spouse Last Name
- Spouse Gender
- Spouse DOB
- Spouse Cell Phone
- Spouse Email Address

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Q: Do all members of my team have access to the integration features?
A: The Redtail integration is open to all users with an Advisor's license, Planner's license, and Assistant's license. eMoney sharing rules apply.

Q. Who do I call for support if I have a question or issue?
A. eMoney has a dedicated Client Engagement Team staffed with experts and certified professionals whose goal is to ensure that you get the most out of your eMoney experience. They have a range of support options to meet your needs and can be contacted anytime at 888-362-8482 or engagement@emoneyadvisor.com to answer questions about accessing and/or generating Redtail data from within emX. With questions specific to Redtail data or functionality, please contact the Redtail support team at support@redtailtechnology.com or call 800-206-5030.