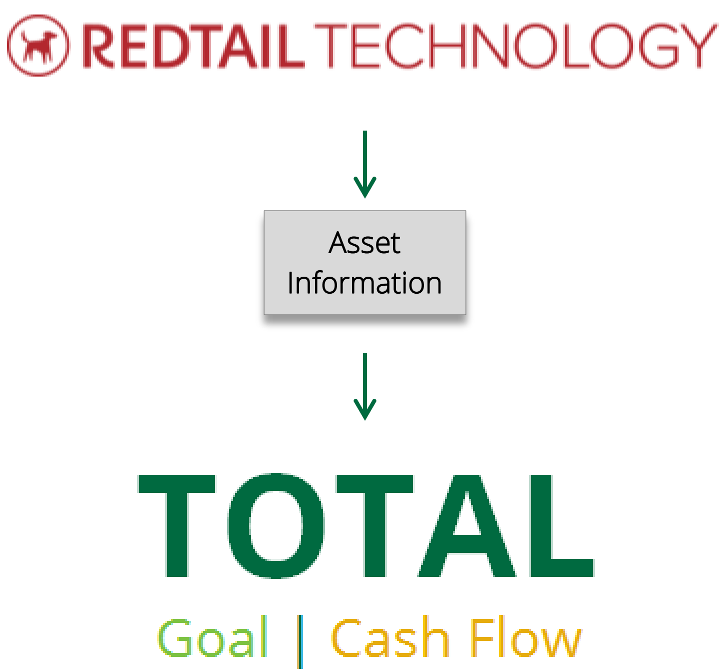
TOTAL Online Integration with Redtail

Money Tree Software's TOTAL Online is integrated with Redtail Technology Inc.'s web-based CRM. This integration allows you to access your Redtail client data in TOTAL Online to streamline your process for creating financial plans.

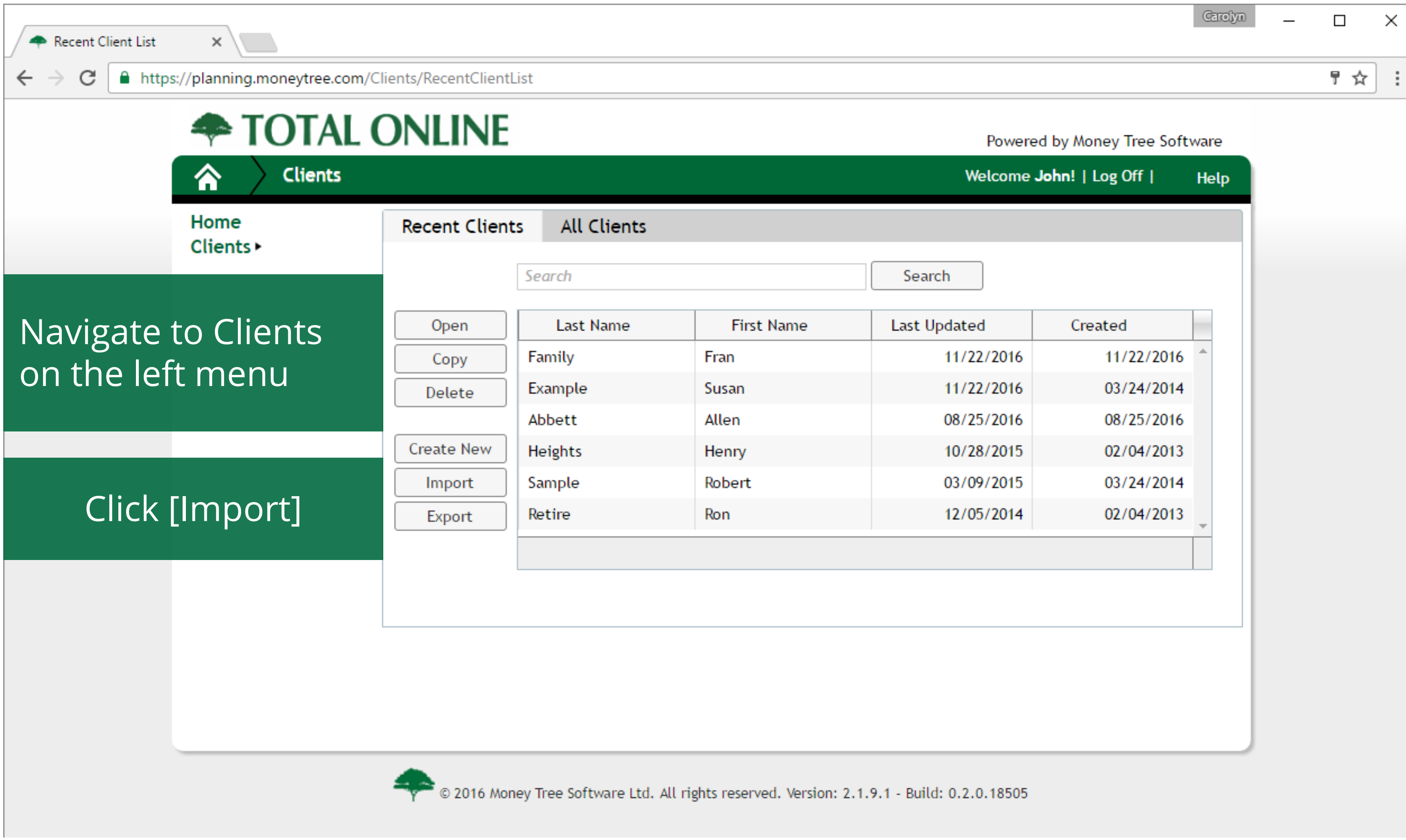


Access Redtail Client Data to Streamline your Planning

Using TOTAL Online's integration with Redtail, advisors can quickly and easily access current asset information to jump-start data entry for creating or updating financial plans. Advisors can now seamlessly access Redtail client data, including:

- Account information
- Balances
- Positions

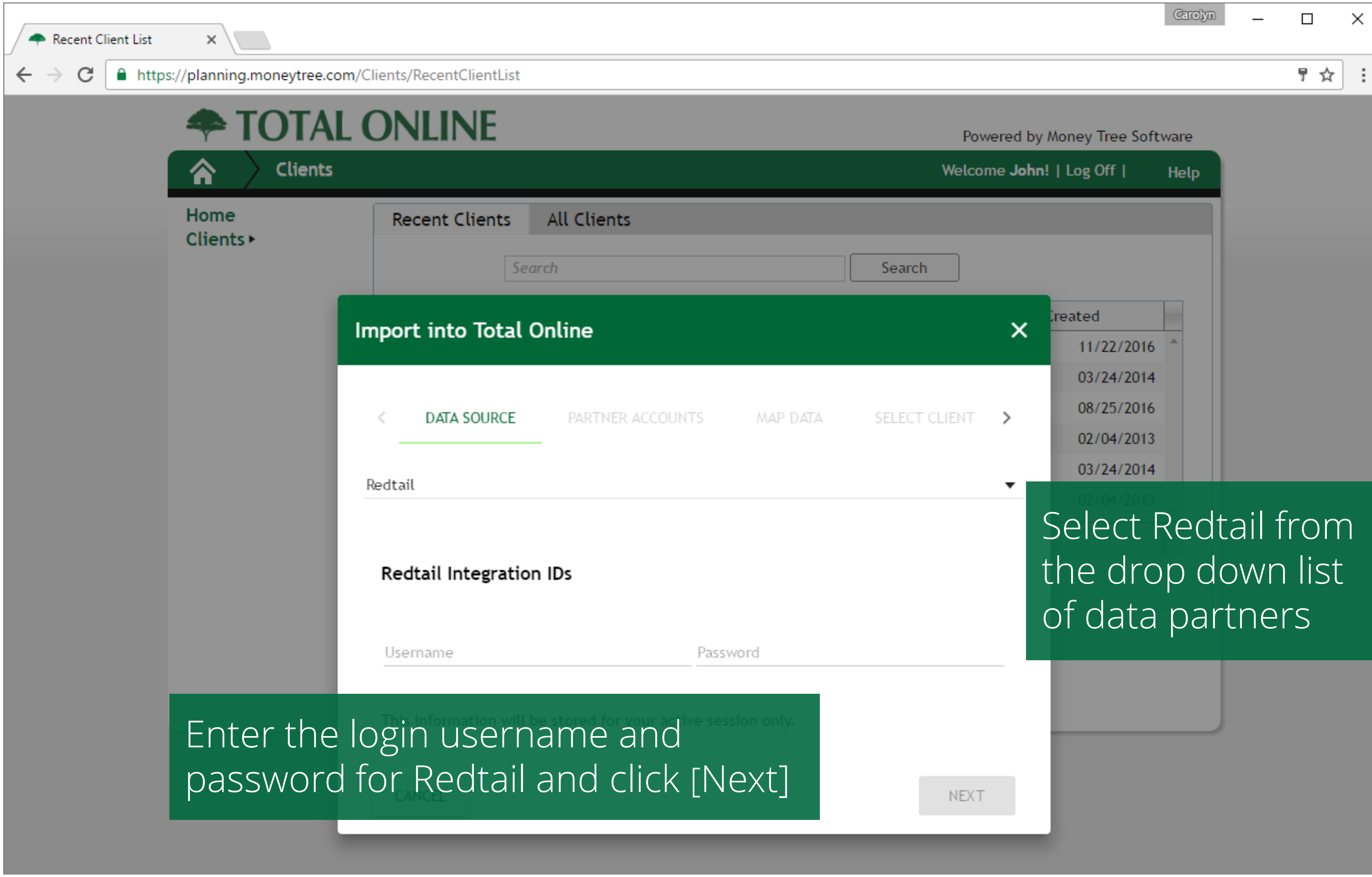
Integration Walkthrough



Navigate to Clients on the left menu

Click [Import]

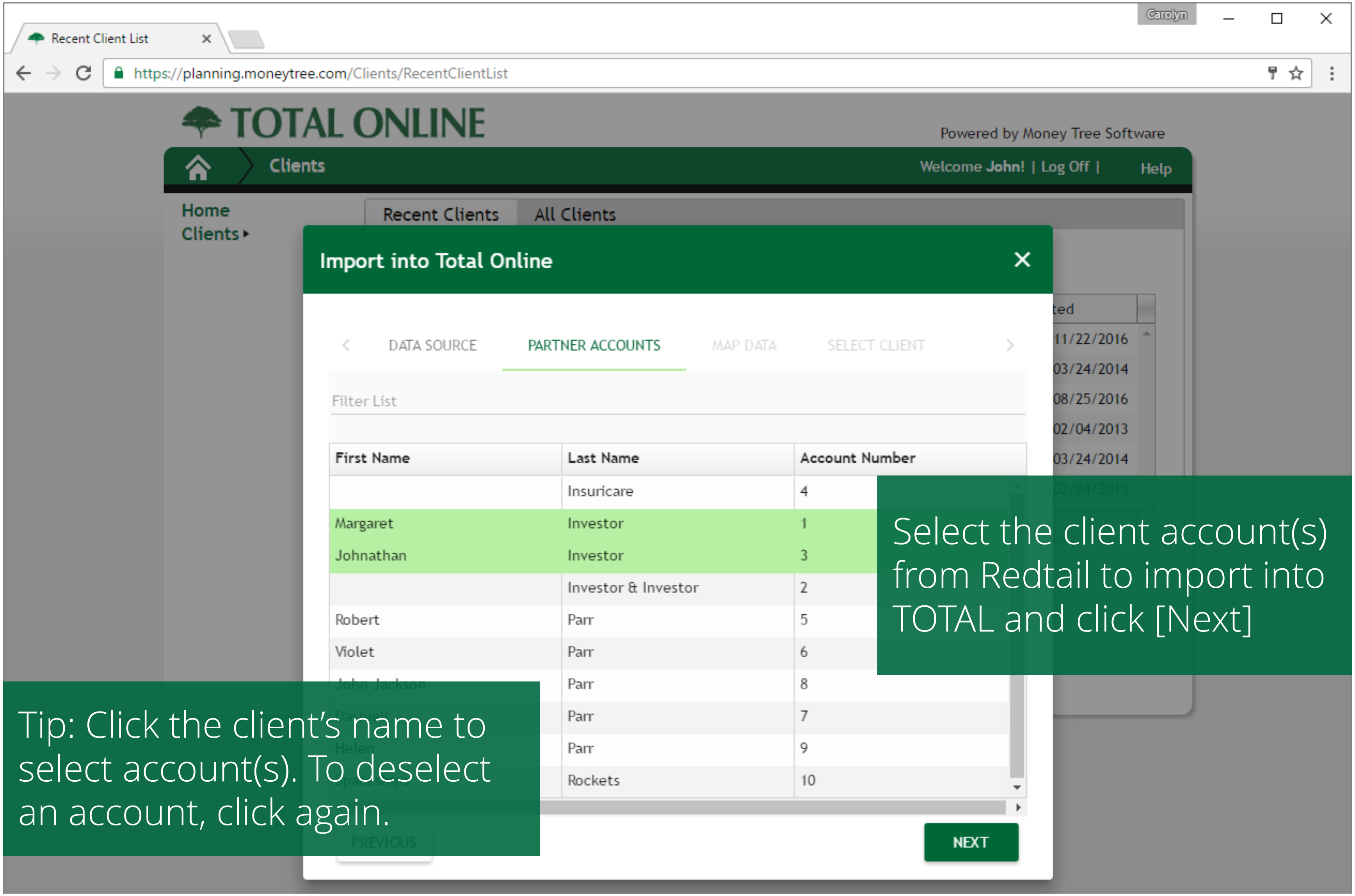
Step 1. Data Source



Select Redtail from the drop down list of data partners

Enter the login username and password for Redtail and click [Next]

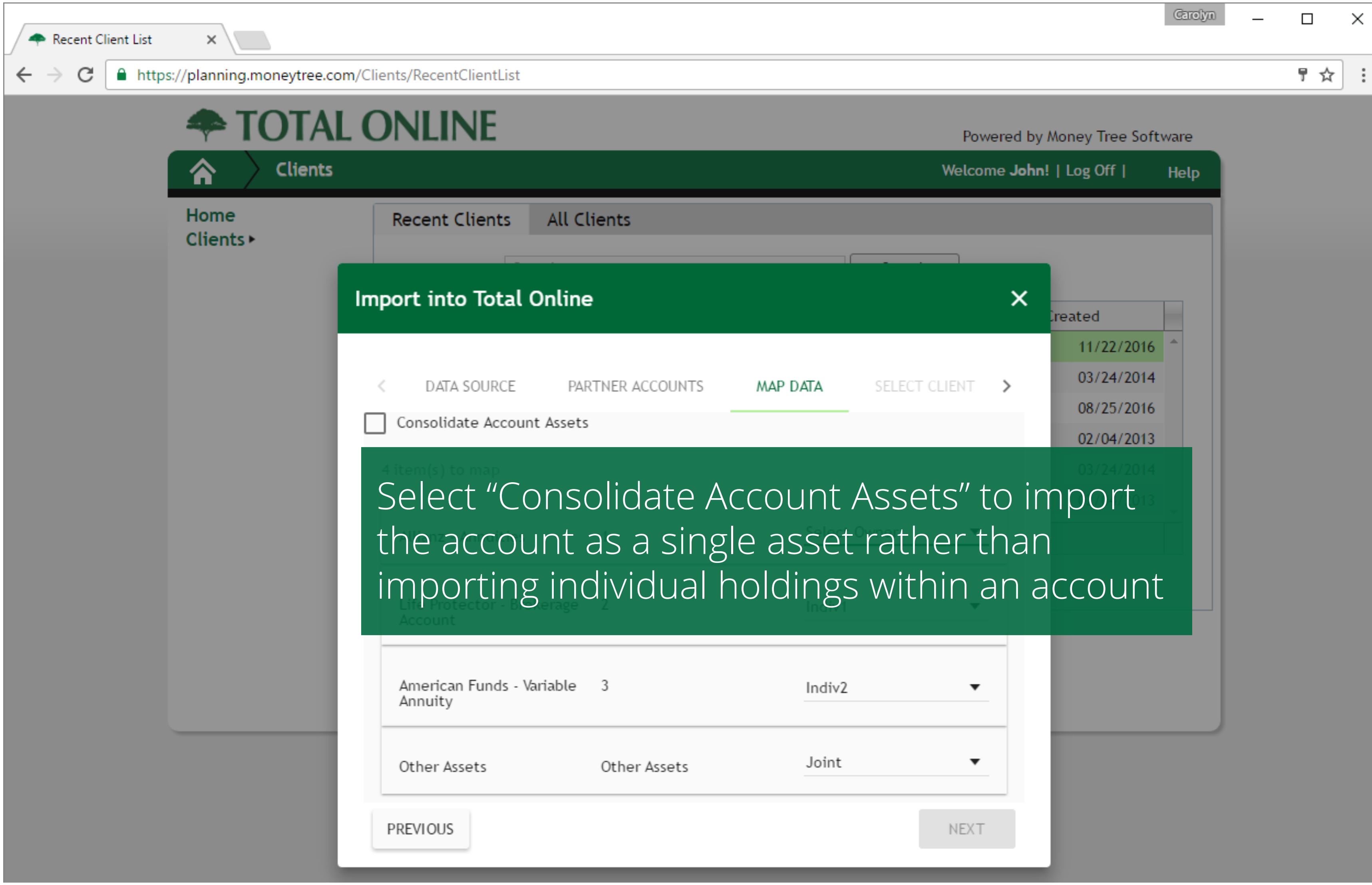
Step 2. Partner Accounts



Select the client account(s) from Redtail to import into TOTAL and click [Next]

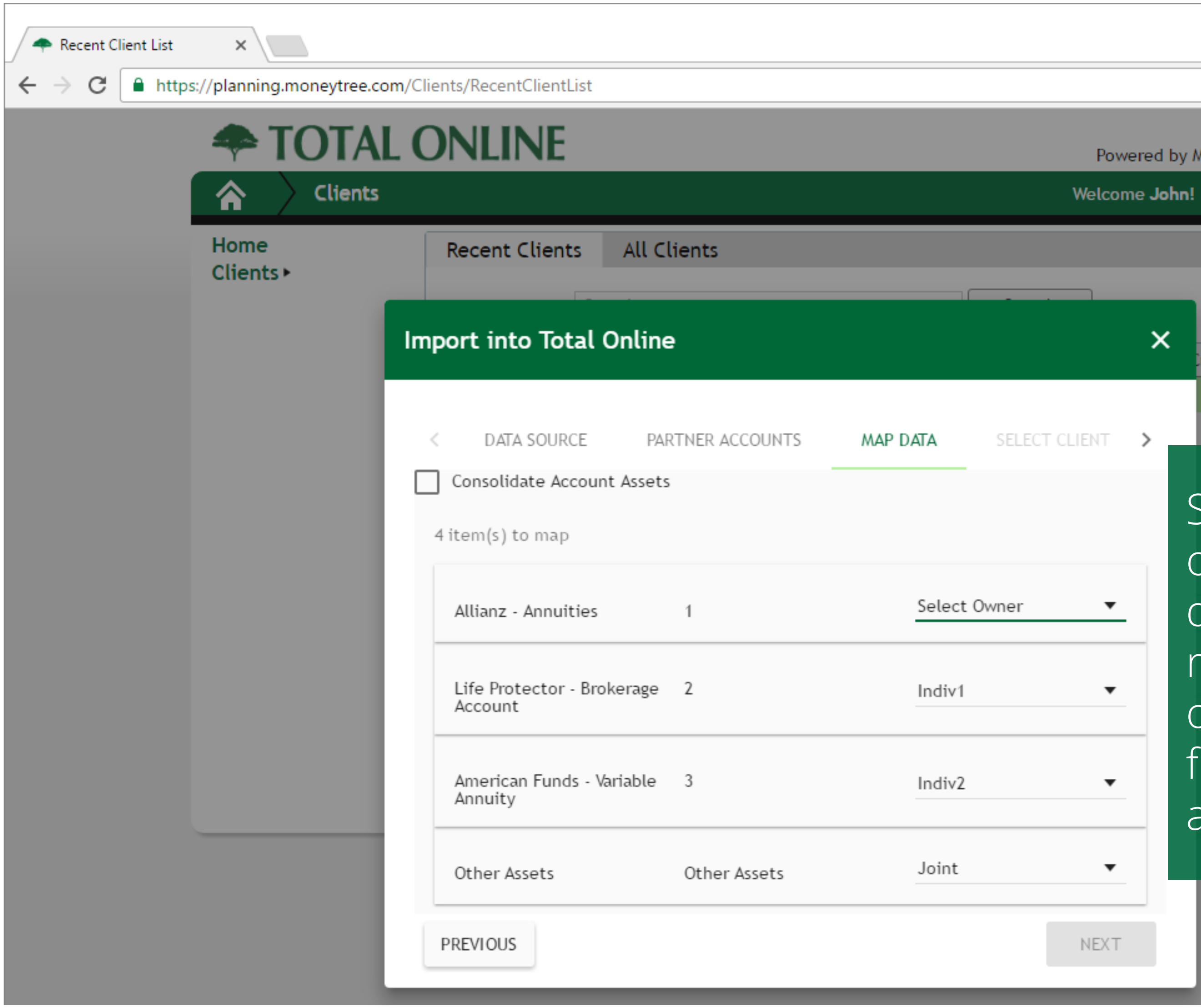
Tip: Click the client's name to select account(s). To deselect an account, click again.

Step 3. Map Data (Consolidate Account Option)



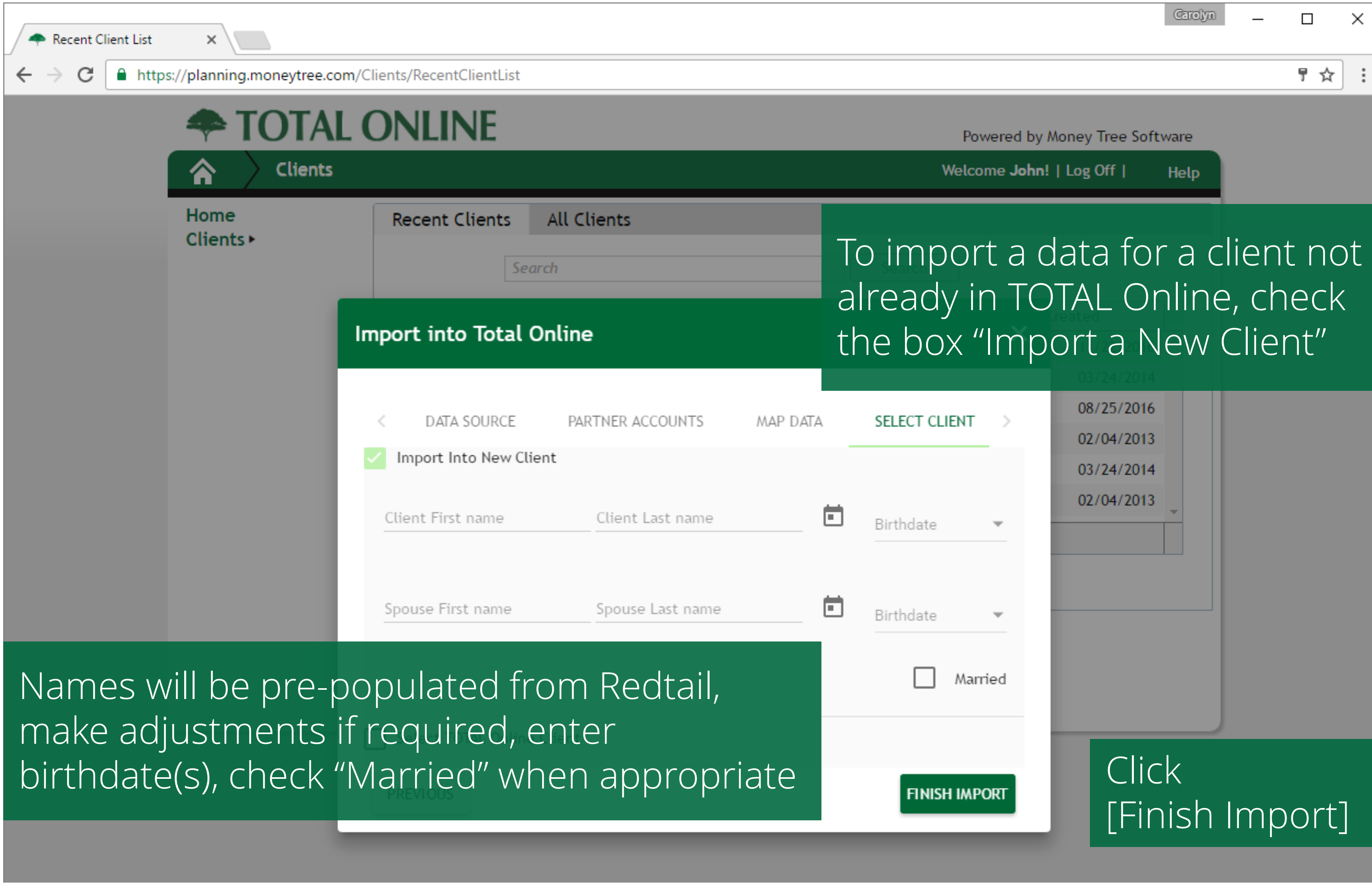
Select "Consolidate Account Assets" to import the account as a single asset rather than importing individual holdings within an account

Step 3. Map Data (Account Owner)



Select the account owner from the dropdown list reflecting the ownership options for TOTAL Online and click [Next]

Step 3. Select Client (Import Into New Client)

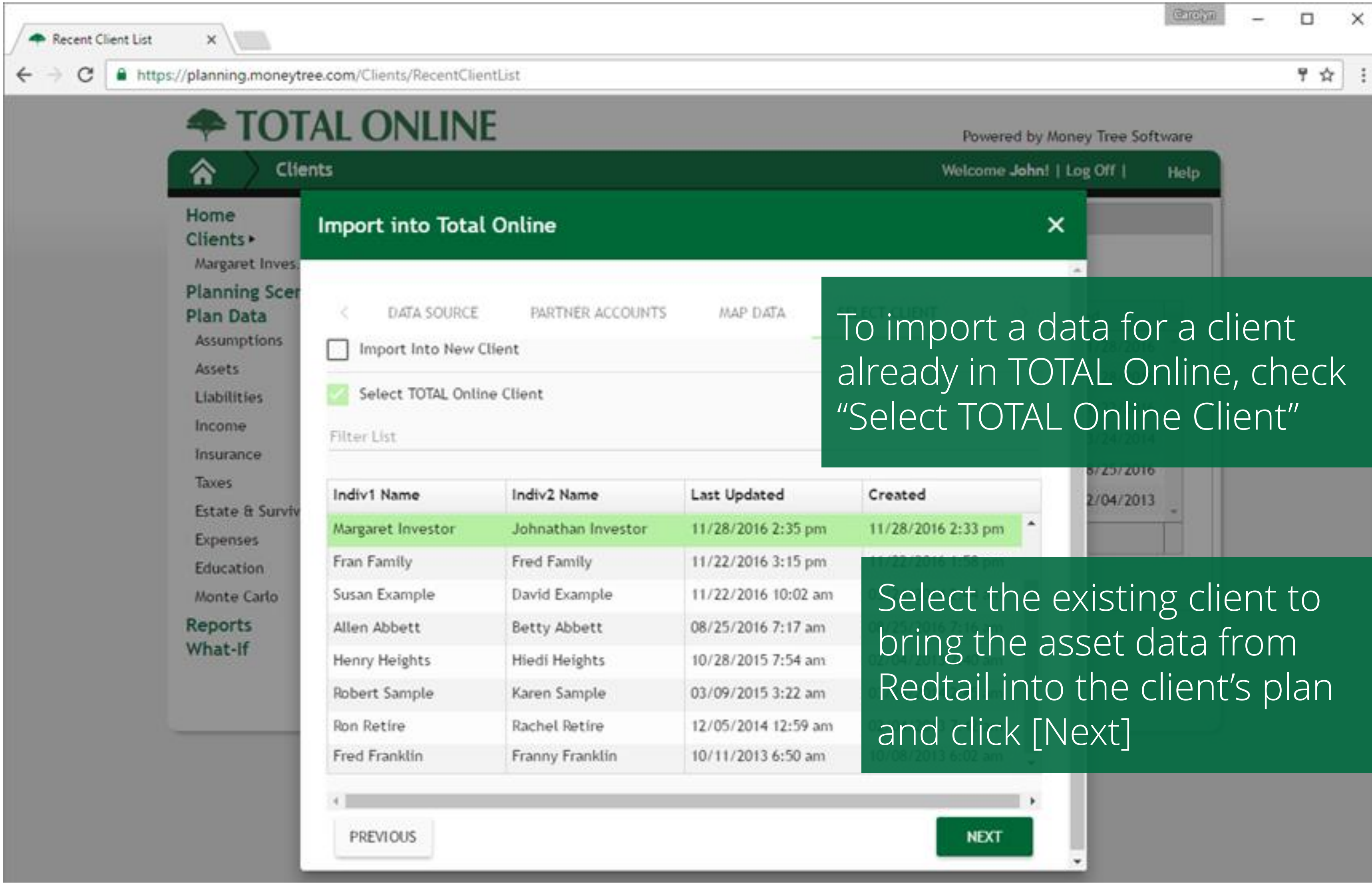


To import a data for a client not already in TOTAL Online, check the box “Import a New Client”

Names will be pre-populated from Redtail, make adjustments if required, enter birthdate(s), check “Married” when appropriate

Click [Finish Import]

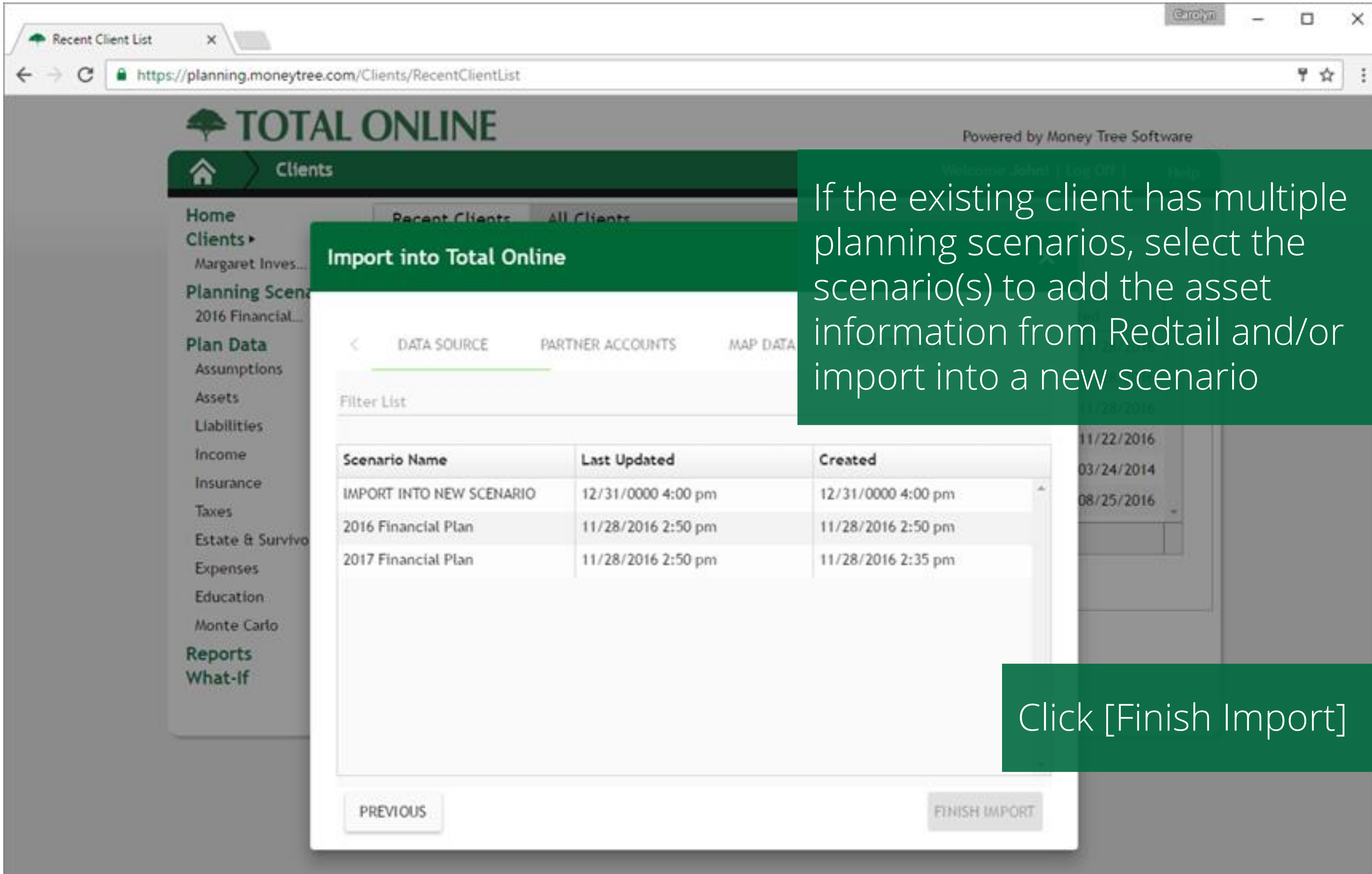
Step 3. Select Client (Import Into Existing Client)



To import a data for a client already in TOTAL Online, check “Select TOTAL Online Client”

Select the existing client to bring the asset data from Redtail into the client’s plan and click [Next]

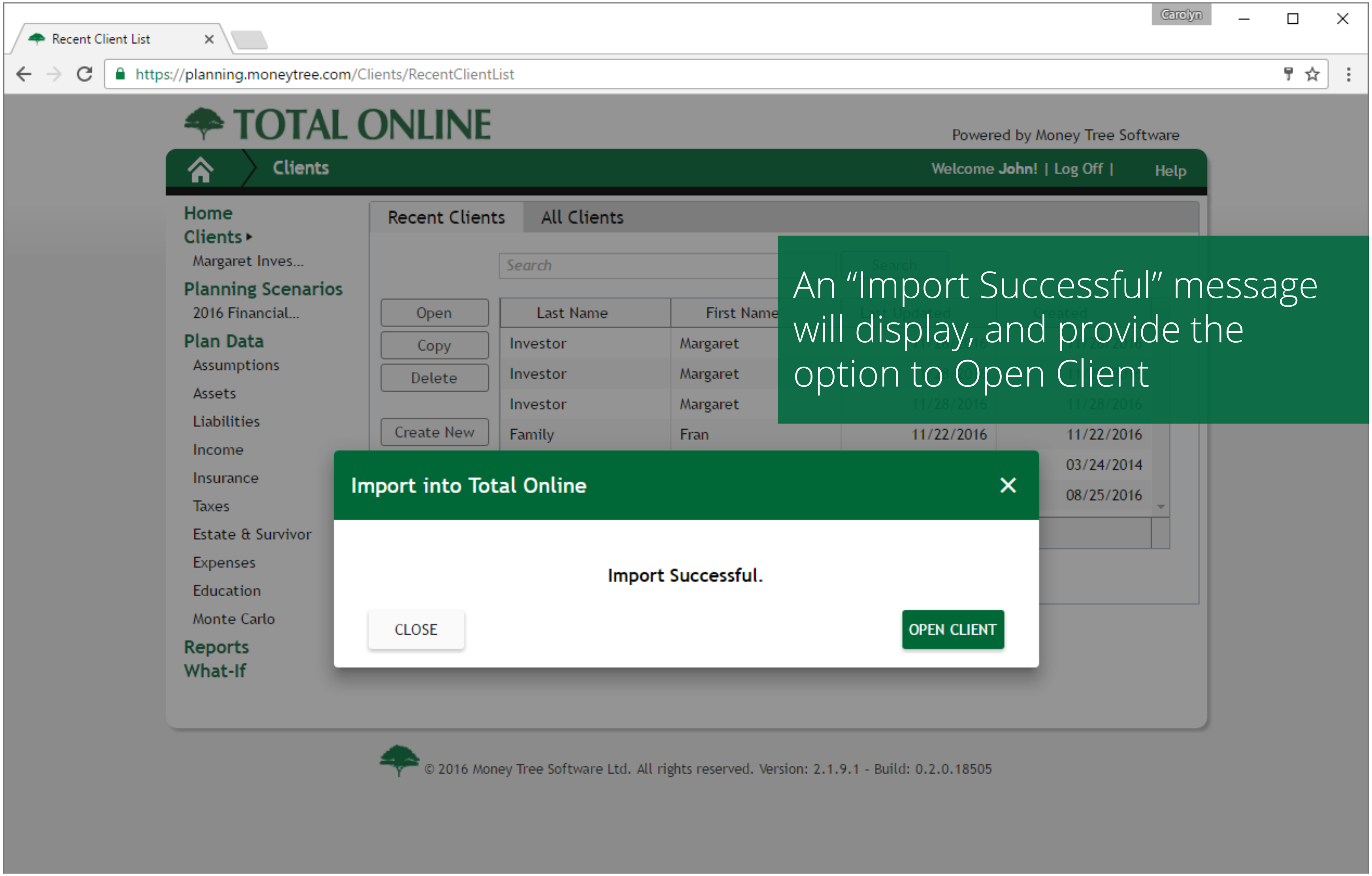
Step 3. Select Client (Import Into Existing Client)



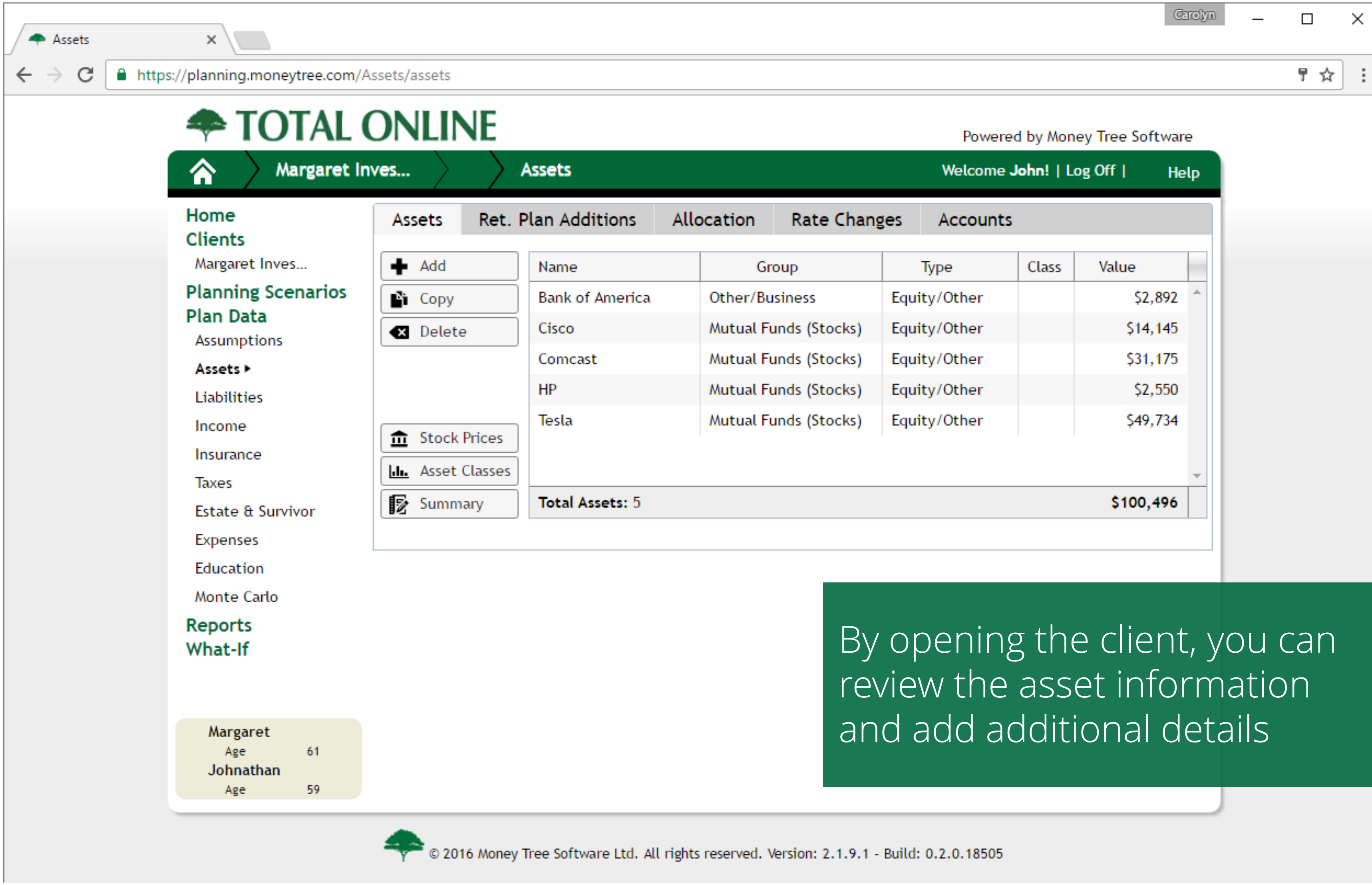
If the existing client has multiple planning scenarios, select the scenario(s) to add the asset information from Redtail and/or import into a new scenario

Click [Finish Import]

Step 3. Select Client (Import Into New Client)



Step 3. Select Client (Import Into New Client)



By opening the client, you can review the asset information and add additional details

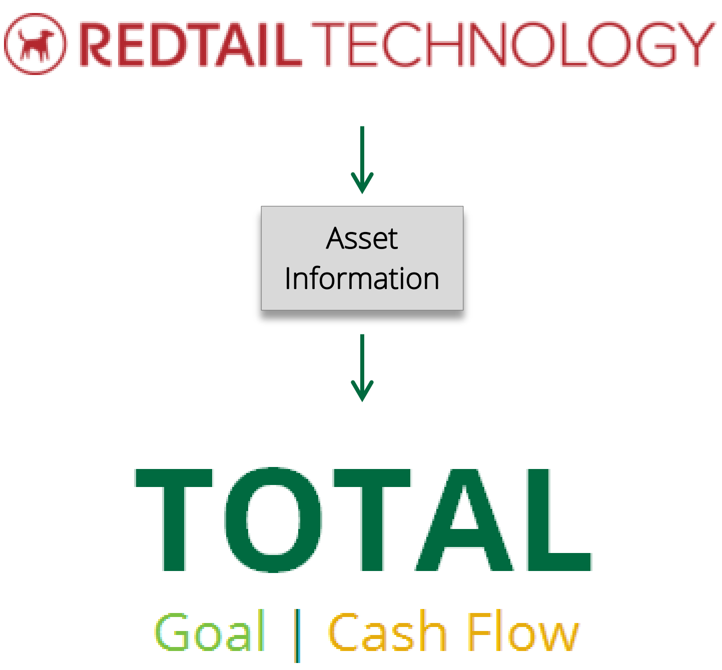
Integration Walkthrough Complete

Start Streamlining Your Planning

Start using TOTAL Online's integration with Redtail to quickly and easily access current asset information to jump-start data entry for creating or updating financial plans.

Need assistance using TOTAL Online's integration with Redtail?

Contact Money Tree's support team:
Call: (877) 421-9815 ext 0 or
Email: support@moneytree.com



About Money Tree Software and Redtail Technology, Inc.

About Money Tree Software

Money Tree Software offers multiple financial planning solutions to address the unique and varying needs of advisors and their clients. For advisors seeking an easy and effective planning solution, Silver provides engaging big-picture planning. For advisors needing a powerful and flexible solution, TOTAL provides fine-tuned planning with the unique ability to create goal-based and cash flow-based reports, allowing advisors to plan for any client situation. Desktop and online editions of Silver and TOTAL are available.

Contact Money Tree Software
Website: www.moneytree.com
Phone: (877) 421-9815

About Redtail Technology, Inc.

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.

Contact Redtail
Website: www.redtailtechnology.com
Phone: (800) 206-5030