



ADVISORYWORLD
FINANCIAL TECHNOLOGY

SCANalytics

How to: Setup Redtail Integration



The screenshot shows the Redtail CRM dashboard. At the top left is the Redtail logo and 'CRM'. Below it is a navigation bar with tabs: Dashboard, Calendar, Contacts, Reports, Resources, Tools, and Manage Your Account. The 'Manage Your Account' tab is highlighted with a blue arrow. A green callout box with the text 'Click Manage Your Account' points to this tab. The main content area is divided into several sections: a calendar for 11/18/2013, 'Recently Added Notes', 'Upcoming Opportunities', 'Copytalk Messages', and 'Mobile Assistant Messages'. On the right side, there is a 'Dashboard' summary with financial metrics (AUM, Avg Portfolio), 'Accounts by Status' (Open, Pending, Under Review, Closed, Unlinked), 'TDA Announcements', and a 'Reminders' list.

This screenshot shows the 'Manage Your Account' dropdown menu. The navigation bar at the top is the same as in the previous screenshot. The 'Manage Your Account' dropdown is open, showing a list of options. A green callout box with the text 'Click Change Site Preferences' points to the first option in the list. The options in the dropdown are: Change Site Preferences, Dropbox Files & Database Backups, Manage Broadcast Emails, Manage Database Integrations, Manage Database Lists, Manage Database Users & Teams, Manage Team Notices, Manage Web Links, Mail Merge Templates, Membership Options, Checklist Templates, and Workflow Templates.

Dashboard | Calendar | Contacts | Reports | Resources | Tools | **Manage Your Account** | Search Contacts

General Options Save

Default Login Screen: Today's Overview
Session Timeout: All Day
Local Time Zone: (GMT-05:00) Eastern Time

Activity Management Save

Default Calendar View: Week
Default Calendar Start Time: 06:00 am
Default Calendar End Time: 08:00 pm
Default Calendar Time Slots: 15 Minute Slots
Default to Show Completed Activities: Yes
Default to All Day Events: Yes
Default Activity Type: Task
Allow iCal Access: Yes

Client Record Options Save

Hide Client SSN/TaxID: True
Default Client Calendar View: Week
Client Notes Per Page: 25
Default Client Notes View: Notes Activity Email Sent Workflow

Notification Management Save

Email Notification - Assigned Activities: No
Email Notification - Completed Activities: No
Email Notification - Assigned Workflow: No
Email Notification - Completed Workflow: No

Integrations Save

AdvisoryWorld

Username:
Account Owner Lastname:
(This is the lastname of the AdvisoryWorld account owner.)

- Preferences (Show All | Resync)
- General Options
 - Activity Management
 - Client Record Options
 - Notification Options
 - Reminders
 - Search Options
 - Email Options
 - Integrations
 - Report Options
 - Miscellaneous

Scroll Down
to
Integrations



Enter your AdvisoryWorld Username
and your Last Name, then press Save

Dashboard | Calendar | Contacts | **Contact Overview** | Reports | Resources | Tools | Manage Your Account | Search Contacts

Basic Information Edit | Change Photo

Account Assets Add

Name	Symbol	Shares	Price	Balance
<input checked="" type="checkbox"/> Alger A Spectra Fund	SPECX	30.402	14.86	\$570.85
<input checked="" type="checkbox"/> Alger A Spectra Fund	SPECX	30.402	17.77	\$682.40
<input checked="" type="checkbox"/> COM Realty	COMRX	34.09	30.93	\$1,054.40
<input checked="" type="checkbox"/> COM Realty	COMRX	34.09	30.92	\$1,054.00
<input checked="" type="checkbox"/> DFA Emerging Marke	DFEVX	11.409	28.56	\$325.84
<input checked="" type="checkbox"/> DFA Emerging Marke	DFEVX	11.409	29.48	\$336.34
<input checked="" type="checkbox"/> DFA US Large Cap Value	DFLVX	15.314	30.56	\$468.00
<input checked="" type="checkbox"/> DFA US Large Cap Value	DFLVX	15.314	25.82	\$395.41
<input checked="" type="checkbox"/> Invesco A Leisure	LSAX	10.087	40.01	\$403.58
<input checked="" type="checkbox"/> Invesco A Leisure	LSAX	10.087	43.95	\$443.32
<input checked="" type="checkbox"/> TD Ameritrade A CA Muni Money Market	TDCXX	4922.92	1	\$4,922.92
<input checked="" type="checkbox"/> TD Ameritrade A CA Muni Money Market	TDCXX	4922.92	1	\$379.03
<input checked="" type="checkbox"/> TD Ameritrade A CA Muni Money Market	TDCXX	4922.92	1	\$364.50

Account Card < Back to Accounts | Edit

Account: 959000040
 Company: TD Ameritrade
 Product:
 Type: Other
 Tax Qual Type:
 Manager:
 Model/Strategy:
 Status: Open
 Balance: \$16,323.39

AdvisoryWorld Reports

- [HoldingScan](#)
- [HoldingScan with Benchmark](#)
- [Investment Fact Sheets](#)
- [Launch SCANalytics](#)

Contact Card

Phone Numbers: (add | history)
 home (111) 222-3332

Internet Addresses: (add | history)

Physical Addresses: (add | history)
 home white house
 Pennsylvania Ave.
 Washington, DC 20559

Social Media: (add | history)

Coverage Information Edit

Coverage Amount: \$0.00
 Death Benefit Option:

Right Click on any Account Asset then choose AdvisoryWorld-Generic Fact Sheet

AdvisoryWorld Reports

- [HoldingScan](#)
- [HoldingScan with Benchmark](#)
- [Investment Fact Sheets](#)
- [Launch SCANalytics](#)

Click HoldingScan (Account Report), HoldingScan with Benchmark (Account Report with performance compared to a benchmark), Investment Fact Sheets (1 Page Sheets for all Account Holdings) or Launch SCANalytics to seamlessly login to AdvisoryWorld's app.