



**ADVISORYWORLD**  
FINANCIAL TECHNOLOGY

# SCANalytics

How to: Setup Redtail Integration



**redtail** | CRM

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

Calendar - 11/18/2013

Activity Date | Subject | Location

Recently Added Notes

Upcoming Opportunities

Copytalk Messages

Mobile Assistant Messages

Search Contacts

Dashboard

AUM: \$14,605,665,857,344,709.08  
Avg Portfolio: \$105,076,732,786,652.58

Accounts by Status

Open:	557
Pending:	6
Under Review:	3
Closed:	5
Unlinked Accounts:	64

TDA Announcements

Invalid TD Ameritrade Veo login credentials.

Reminders

- Account Renewals - 24
- Account Riders - 0
- Birthdays - 36
- Checklist Tasks - 9
- Client Reviews - 37
- My Checklist Tasks - 9
- Seminar Checklist Tasks - 0
- Wedding Anniversaries - 3
- Workflow Tasks - 58

Click Manage Your Account

**redtail** | CRM

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

Calendar - 11/18/2013

Activity Date | Subject | 1

Recently Added Notes

Upcoming Opportunities

Copytalk Messages

Mobile Assistant Messages

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

Workflow Templates

Click Change Site Preferences

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: chicagobulls  
Account Owner Lastname: jordan  
(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.