

Integration Setup Between Redtail and Docupace

After logging into Redtail, click on your username in the top right corner of the screen. Then, click on the **Manage Your Integrations** link in the dropdown menu.

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		Logged in as: pcsdocupace1 Preferences
0 active WORKFLOW TASKS	5	Manage Your Account Manage Your Downloads
t due upcoming	activity op	Manage Your Integrations
N	c	Help Center
		Web links
		Log out

From the list of companies, locate Docupace Technologies in the new popup window.

$\mu_{1} L$	Advicent (formerly Zywave) Send To Profiles	
	AdvisoryWorld	
	Generate AdvisoryWorld Reports Albridge Solutions	
	Integrate with Albridge Solutions	
-	CitiesDigital / Laserfiche	
-		
D	Docupace Integrate with Docupace	
P.	eMoney	
	Integrate with eMoney	
-e	FinanceLogix Integrate with FinanceLogix	
asi	GoalGamiPro	
	Integrate with Advisor Software GoalGamiPro	
Z	Laser App Software Desktop	
-	MarketingLibrary	
PRO	Integrate with MarketingLibrary	
\bigcirc	Morningstar	
	Integrate with Morningstar	
-	Myiceberg	
-	Integrate with my iceberg	
	Orion Advisor Integrate with Orion Advisor	

Click on the **gear icon** and select Settings.



A new window will appear. Enter your Docupace URL which you can simply copy/paste from the Docupace login screen. **IF YOU COPY AND PASTE THE URL, YOU MUST CLEANUP THE URL BY REMOVING EVERYTHING THAT APPEARS AFTER PCSBD so** that the URL matches what is reflecting in the Domain field in the below screenshot.

UPDATE INTEGRATION SETTINGS	\times
Domain	
https://www2.paperout.com/pcsbd	
Copy the token below and paste it in the Docupace screen requesting a token.	
4D914C49-E015-4589-B3E5-7FE84CEF2A89	
regenerate token	
cancel	save

Copy the token that appears in the Token field before clicking Save. The token will need to be pasted into Docupace. Token authentication allows for seamless entry into Docupace without the need for retyping usernames and passwords.

After logging into Docupace, click on your username in the upper right corner of the screen.

Dashboard M	Ionitor F	Retrieve 🕶	Administra	ition 🕒	New •	matt_scrimshaw •
	🕂 Ехр	ort 🚽 🗋 (Create Work Item	Charles	h 🕈 Get Fro	om Pool 🛛 📌 Reassign
Advisor ID	Account #	Creator	Work Item Id	SLA Start	Task Name	Validation Message

Click **Settings** in the popup menu.

matt_scrimshaw	Settings	
O User Guide	⊠ ∰ntact	Privacy

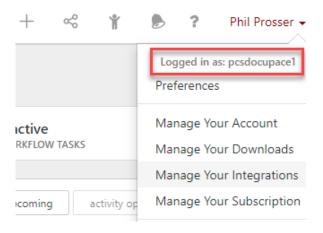
Select *Redtail Credentials* on the left-hand side.



In the Redtail User Id field, enter your Redtail User Id. You do not need to enter your password.

91 / Details			± Sa	ve 🛓 Save and Close 🏫 Starting Point 🙁 Cancel
Details		Not Required	-	
	User ID * matt_scrimshaw	Required	Redtail User Id	Enter Your Redtail User Name
	Redtail Password		Redtail Token	Paste the Token you Copied

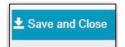
Note: Your Redtail User Id is displayed on the profile menu below your name.



In the Redtail Token field, paste the token that you copied from Redtail into the Redtail Token field.

		🛓 Sa	ve 🛓 Save and Close 🏫 Starting	g Point X Cancel
User ID * matt_scrimshav	N	Redtail User Id	Enter Your Redtail User Name	45
assword	5	Redtail Token	Paste the Token you Copied	
	User ID * matt_scrimshav		User ID * matt_scrimshaw Redtail User Id	User ID * matt_scrimshaw Redtail User Id Enter Your Redtail User Name

Click Save and Close to exit.



The integration setup process between Redtail and Docupace is now complete. You may begin to utilize the integration by selecting a Contact in Redtail.

Contacts A-Z	(4 records) All # A B C D E	FGHIJKLMNOPQRSTUVW	XYZ	iii • contact opti	ions - new contac
	NAME	STATUS	CATEGORY	SOURCE	TYPE
□ ⊙ ①	Redtail, Alison D (Ali Redtail) Docupace Technologies	Not Specified	A Client		Individual
	Rodney,	Not Specified			Individual
	Roja, Antons	Not Specified			Individual

Click on the **Integration** button.



Click on **Docupace** in the new window.

TEGRA	TIONS	
11	Advicent (formerly Zywave) Send To Profiles	
4	AdvisoryWorld Generate AdvisoryWorld Reports	
-	Albridge Solutions Integrate with Albridge Solutions	
+	CitiesDigital / Laserfiche Integrate with CitiesDigital / Laserfiche	
1	Docupace Integrate with Docupace	
e	eMoney Integrate with eMoney	
ŀ	FinanceLogix Integrate with PinanceLogix	
asi	GoalGamiPro Integrate with Advisor Software CoalGamiPro	
4	Laser App Software Desktop Integrate with Laser App	
PRO	MarketingLibrary Integrate with MarketingLibrary	
\bigcirc	Morningstar integrate with Morningstar	
+	Myiceberg Integrate with my looberg	
	Orion Advisor	

The following three integration options are available: Single Sign On, Send to Client Folder and Send to Starting Point.

CUPACE		Visit Site
D	2001 S. Barrington Suite 215 Los Angeles, CA 90025 (866) 582-3713 Website	
Single Sign On		
Send To Client F	older	
	Point	

Single Sign On – when you click on Single Sign On within Redtail, Docupace will open in a new browser tab. You will first land on the Dashboard page as if you had logged in using your Docupace username and password.

Send to Client Folder – when you choose this option within the Client Record, the client data that has been entered into Redtail will create a client folder with a general subfolder in Docupace. Additionally, when you make any updates/changes to your Client Contact in Redtail, you can follow the same steps we just covered (choose the

integration button at the top of the page in Redtail) to send the NEW details for the client to UPDATE Docupace.

Send to Starting Point – when you choose this option, the client data is submitted into the Docupace workflow. This will launch a questionnaire to be completed for the account opening process.