PRIVATE CLIENT SERVICES ™
MEMBER FINRA, SIPC
A Registered Investment Advisor

Let our independence ignite yours.™

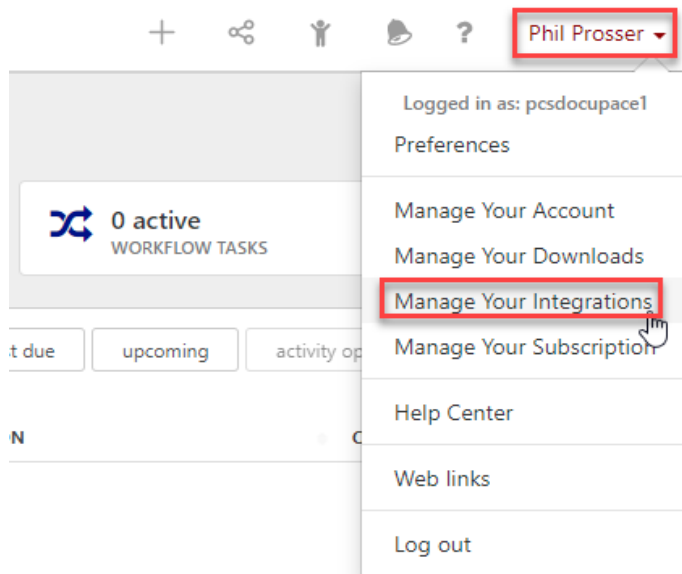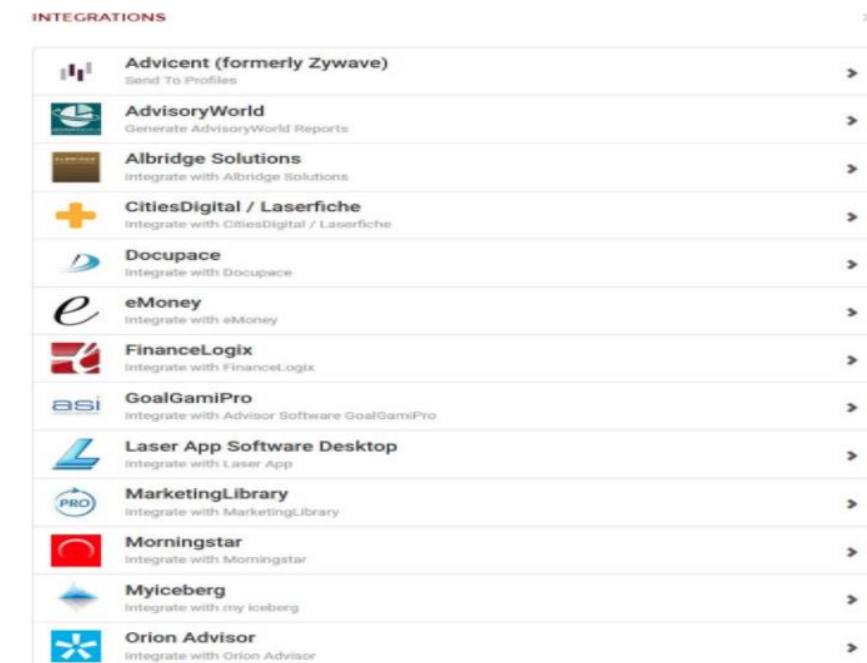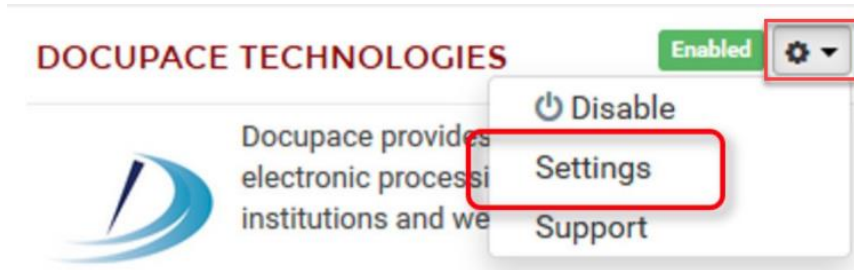**Integration Setup Between Redtail and Docupace**

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.

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

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.**

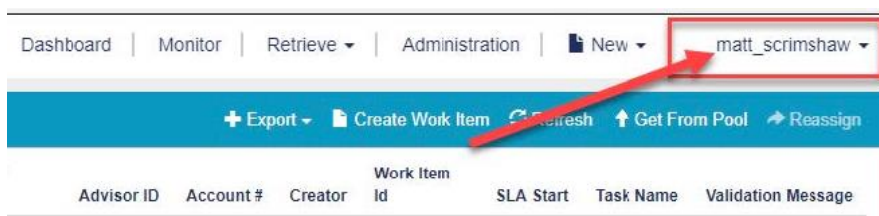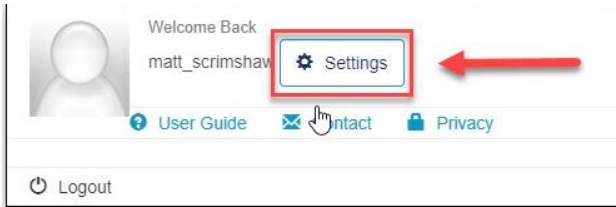**Copy the token that appears in the Token field before clicking Save.** The token will need to be pasted into Docupace. Token authentication allows for seamless entry into Docupace without the need for retyping usernames and passwords.

After logging into Docupace, click on your username in the upper right corner of the screen.
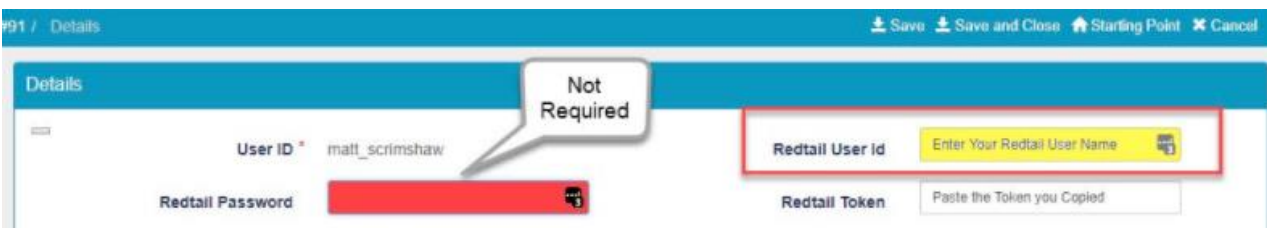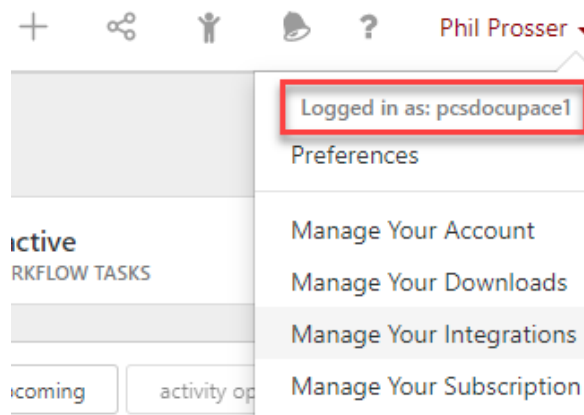
Click **Settings** in the popup menu.

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.

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.

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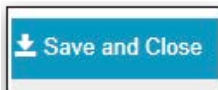
The integration setup process between Redtail and Docupace is now complete. You may begin to utilize the integration by selecting a Contact in Redtail.

Click on the **Integration** button.

Click on **Docupace** in the new window.
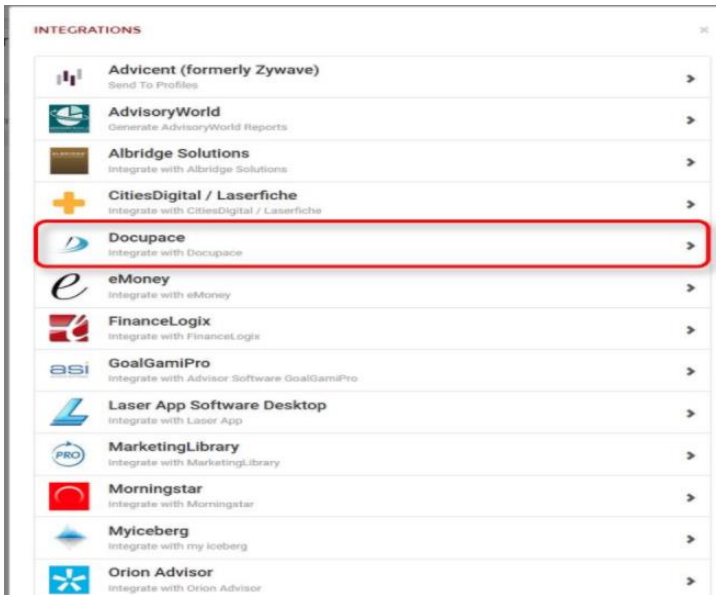
The following three integration options are available: Single Sign On, Send to Client Folder and Send to Starting Point.

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.