Redtail Integration Setup

1. Introduction

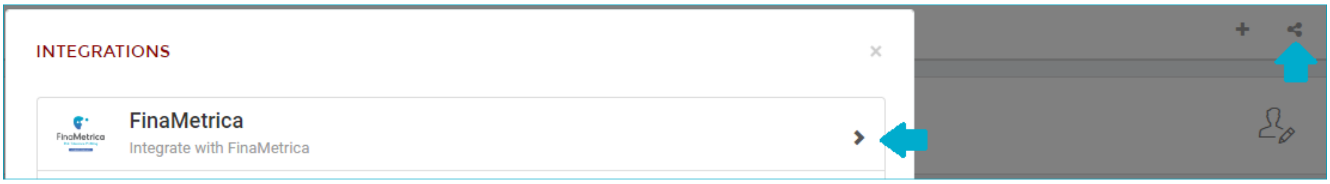
The following guide provides details on how to:

- ❖ Connect to FinaMetrica from the Redtail portal.
- ❖ View FinaMetrica risk tolerance score and date from within Redtail.

2. Connect to FinaMetrica from the Redtail Portal

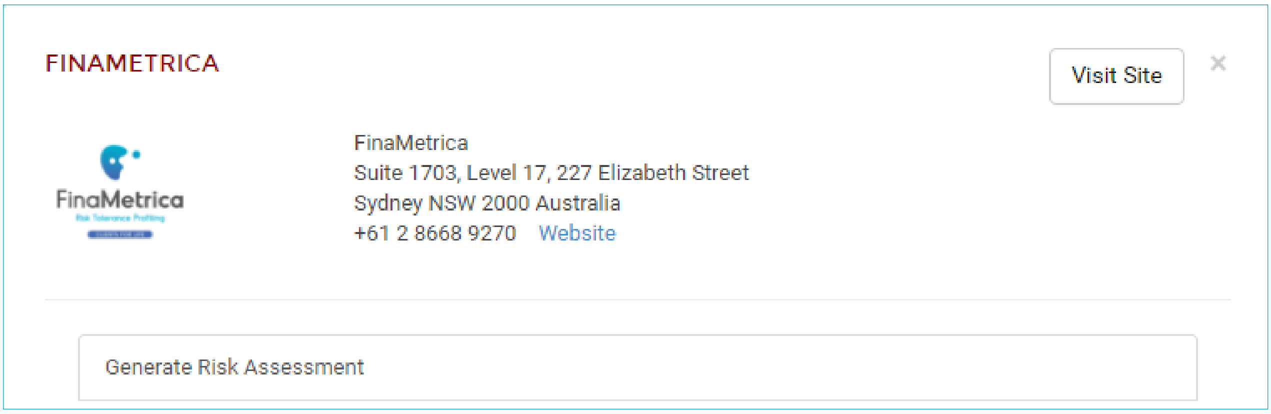
The integration only works in the Project Tailwag version of Redtail. In order to begin using this integration, you'll need to enable the FinaMetrica integration within your database. Instructions for enabling integrations can be found here : http://help.redtailtechnology.com/hc/en-us/articles/203976350-Manage-Your-Integrations.

a. After selecting a contact, click on the **Integrations** icon on the top right hand corner to bring up a list of integrators. Locate FinaMetrica and click on the next arrow.

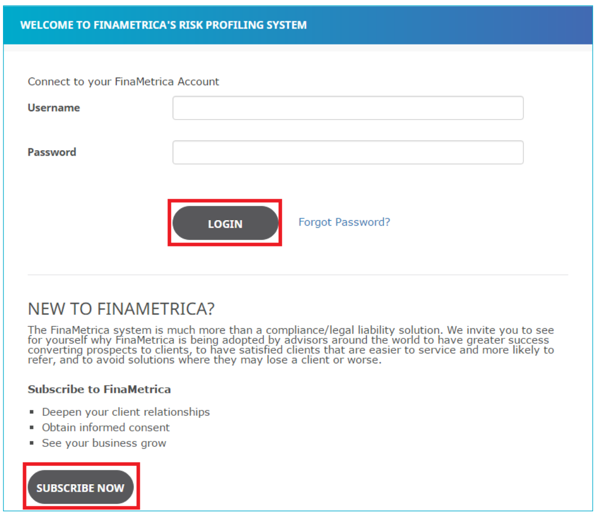


b. In the pop-up screen, select **Generate Risk Assessment** to connect to FinaMetrica.

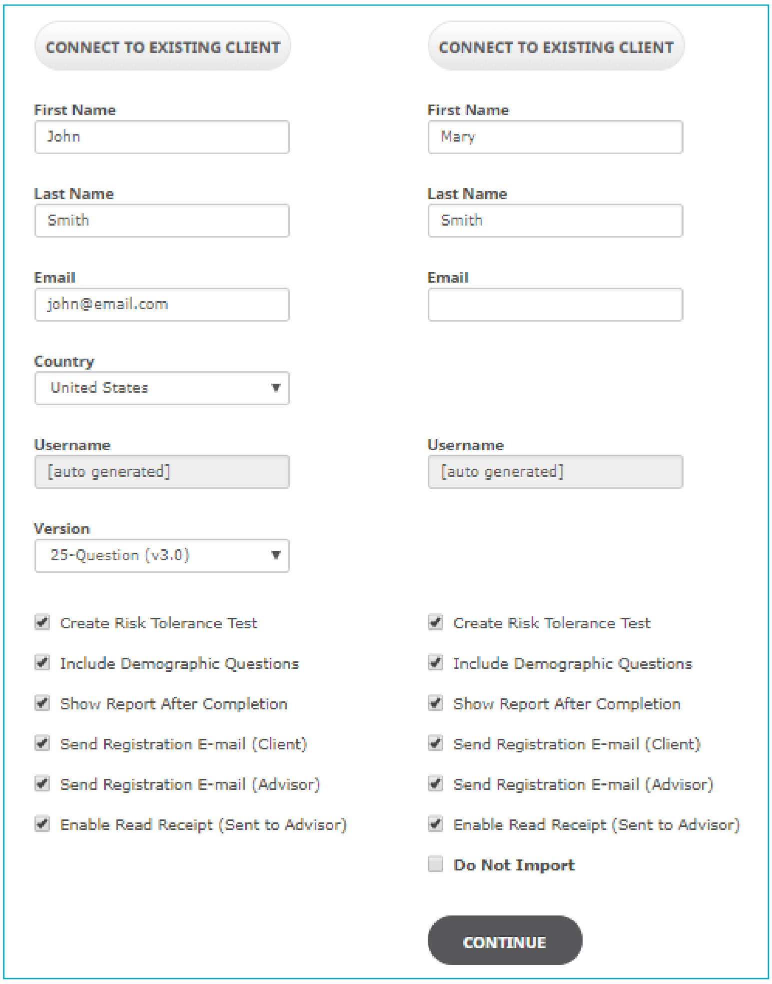
c. If you have an existing FinaMetrica account, please enter your credentials and login. You only have to do this once, subsequent visits will take you straight into your FinaMetrica account.



Advisors new to FinaMetrica can sign up for a complimentary 30-day trial. You'll be asked to confirm your details upon subscription. You only have to do this once, subsequent visits will take you straight into your FinaMetrica account.



d. Your clients' details will be presented as shown below.



- If your clients have already been created in FinaMetrica previously, you can link them up by clicking on **Connect to Existing Client**. You'll be presented with a list of existing clients to select from. Repeat this step for the partner account. Select appropriate options for each client then click **Continue** to proceed.
- For clients new to FinaMetrica, select appropriate options for each client then click Continue to proceed.
- You only have to do this once, subsequent visits for linked clients will take you straight into your their FinaMetrica accounts.

e. You'll then be presented with your clients' risk tolerance details. For advisors new to the FinaMetrica portal, please refer to the QuickStart Guide under Resources for details on how to navigate the site.

3. View FinaMetrica risk tolerance score and date from within Redtail.

a. Once your clients have completed the FinaMetrica questionnaire, you'll be able to view the score and report from within FinaMetrica as well as from Redtail. After selecting a contact within Redtail, click on the **Integrations** icon on the top right hand corner to bring up a list of integrators.

c. Locate FinaMetrica and click on the next arrow. In the pop-up screen, you will be able to see the client's risk tolerance score and date and agreed risk tolerance score and date. To access the report, click on **View Report**.

d. To generate a new test for your client, click on View Report as per above, then New Test. The old test information will then be cleared from Redtail and populated with the latest test results.

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