ReadyDoc RedTail CRM Integration

The ReadyDoc integration with Redtail allows for searching for client documents and capturing new client documents from within the familiar confines of Redtail CRM. No Desktop application software is required for Searching or Capturing documents, but users with high scan volumes may still opt to install our *ReadyCapture* desktop application to take advantage of some of its features.

Integration Setup:

With a valid ReadyDoc account on our new platform at <u>https://app.readydoc.com</u>, the integration with Redtail CRM is a free add-on, and can be activated using the following steps:

- 1. From the Redtail CRM application, navigate to a client contact record. You must be positioned on a Contact record for the ReadyDoc integration options within Redtail to be visible.
- 2. Click the Integrations icon at the top right of the Redtail CRM window and then click ReadyDoc

REDTAILCRM	Search Contacts			+	- 📀 ۴	• ?
Today	Robert "Bo	b" Dorr 🔨		Filter		
Calendar	Relationship Sp	pecialist at Insuricare		The	L,	
Contacts	Married to Hel	en L Parr The Parr Fami	iy			
Robert Parr	-	-				\$0.00
Accounts	NEXT REVIEW	NEXT ACTIVITY	LAST ACTIVITY	ReadyDoc	KFLOWS	PORTFOLIO BALANCE
Activities	Past Due and Next 30	Latest Notes	٢	- Ris		add 🗸
Decuments		•				

NOTE: If you do not see the ReadyDoc option in the integrations dropdown, you may need to go to the Integrations window in Redtail and turn it on.

3. At the ReadyDoc popup window, select the Search option:

.CRM	Search Contacts				+ 😤	¥	
	READYDOC				visit site	×	
	R	ReadyDoc, L 2440 Vassar Reno, NV 89	Street				3
		(855) 879-7	323 Website				
	Capture to ReadyDoc						
-	Search ReadyDoc						
	ſ						m
					cancel		41-22
							84-71
				-			ole113

4. The first time the Redtail integration is selected from a given device, ReadyDoc will prompt for the Redtail credentials. These are saved on the local device in an encrypted cookie and will not be requested again for 60 days, or whenever the login to Redtail CRM from ReadyDoc fails.

(PLEASE SEE NEXT PAGE)

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4a. The Redtail Integration Configuration window:

ReadyDoc		
Redtail Integration Co	onfiguration	
Please provide Redtail Configuration s	settings below and click Test to enable update	
Redtail API URL	https://api2.redtailtechnology.com/crm/v1	I/rest
Redtail User Name		
Password		Test
Use Desktop Capture	OFF	
Use Desktop Search	OFF	
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4b Enter your Redtail UserName and Password and click the Test button:

ReadyDoc									
Redtail Integration	Configuration								
Please provide Redtail Configuration settings below and click Test to enable update.									
Redtail API URL	https://api2.redtailtec	hnology.com/crm/v1/re	st						
Redtail User Name	(Inclusion)								
Password		Ô	Test						
Use Desktop Capture	OFF		2						
Use Desktop Search	OFF								
© 2022 - ReadyDoc, LLC									

4c. If the credentials were correct you will receive an "Authentication Successful" result. Click "Save Credentials" to continue. If the credentials were incorrect, re-enter them and click Test again.

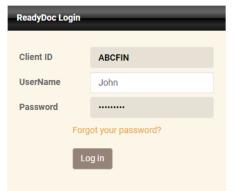
ReadyDoc		
Redtail Integratior	n Configuration	
Please provide Redtail Configu	ration settings below and click Test to enable upo	late.
Redtail API URL	https://api2.redtailtechnology.com/crr	n/v1/rest
Redtail User Name	The second se	
Password		Test
Use Desktop Capture	OFF	
Use Desktop Search	OFF	
	Authentication Successful	
User Key	6A165FD0-07DB-4366-A1FE-B2357[
	Save Credentials	
© 2022 - ReadyDoc, LLC		

5. After saving the Redtail CRM Username and Password the Redtail Configuration is complete and the Search result window will be displayed. Please see the next sections for an overview of Searching or Capturing documents in ReadyDoc through the Redtail CRM Integration.

ReadyDoc to Redtail CRM – Searching For and Capturing Documents

When capturing or searching for documents in ReadyDoc from Redtail, a valid login session to ReadyDoc is required. With this in mind, you might receive a login prompt when executing either the *Search ReadyDoc* or *Capture to ReadyDoc* options. After providing these values you will not be prompted in subsequent Search or Capture requests as long as there is a valid ReadyDoc session. ReadyDoc sessions last 30 minutes from the time of last activity, or until the Logout option is selected from the ReadyDoc Cloud application.

The ReadyDoc login prompt:



Searching for Documents:

- 1. From the Redtail CRM application, navigate to a client contact record. You must be positioned on a Contact record in order for the ReadyDoc integration options within Redtail to be visible.
- 2. Click the Integrations icon at the top right of the Redtail CRM window and then click ReadyDoc

③ REDTAILCRM	Search Contacts				+ %	Ť	2		•
Today	Robert "Bo	h" Darr 🛧		Filter					-
Calendar	Relationship S	pecialist at Insuricare len L Parr The Parr Fami	L.	Titter		2	£@ (!		
Contacts	Married to He	ien ciearr i The Parriann	iy			-			
Robert Parr	-	-	-	-			\$0.00		
Accounts	NEXT REVIEW	NEXT ACTIVITY	LAST ACTIVITY	ReadyDoc		KFLOWS	PORTFOLIC	BALANCE	
Activities	Past Due and Next 30	Latest Notes		- Ars				add 🕶	
Documents		-							

NOTE: If you do not see the ReadyDoc option in the integrations dropdown, you may need to go to the Integrations window in Redtail and turn it on.

3. At the ReadyDoc popup window, select the Search option:

CRM	- Search Contacts	+ ~~	¥. 🖻
	READYDOC	visit site ×	ß
	ReadyDoc, LLC 2440 Vassar Street Reno, NV 89502 (855) 879-7323 Website		<u>مح</u>
	Capture to ReadyDoc		
-	Search ReadyDoc راس		m
		cancel	41-226 84-712 ple113@

 The Search results for documents in ReadyDoc matching the selected Redtail CRM contact will be displayed.

ReadyDoc										Х
Showing 1 to 3 of 3 entries			Export List	Export Documents					Filter:	
Q 🗘 DocName	First Name	🕴 Last Name	Document Date	DocumentType	SSN Tax ID	Finv Account No	Inv Account Type	Ins Policy No	Ins Policy Type	Created Dt
T The Gettysburg Address	Robert	Parr		AAA Client			Insuricare			7/28/2020 5:26:20 PM
T Declaration of Independence	Robert	Parr		AAA Client			Insuricare			7/28/2020 5:26:25 PM
A Declaration	Robert	Parr	07/01/2022	Application			Insuricare			7/21/2022 9:05:48 PM
© 2022 - ReadyDoc, LLC										

Rom the Search results window you can View a document in the list, or open the ReadyDoc Cloud application to the folder that the document can be found in.

To View a document:

A. Double-click on the document row in the Search results -OR-

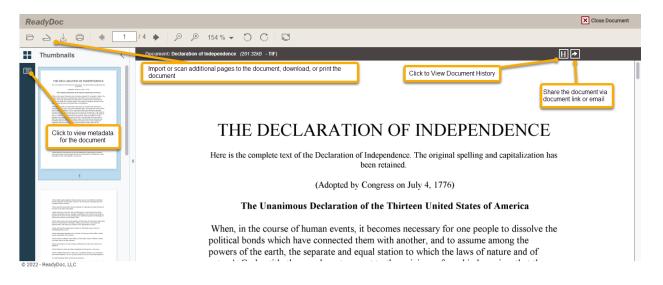
Single-click the document icon on the far left in the \bigcirc column (best for Mobile or Tablet). -OR-

B. Right-click and select the View Document option from the menu.

ReadyDoc						
Showing 1 to 3 of 3 entries 1 row	v selected		Export List	Export Documer	its	
Q 🗘 DocName	🕴 First Name	Last Name	Document Date	DocumentType	SSN Tax ID	¢ h
T The Gettysburg Address	Robert	Parr		AAA Client	412968745	
T Declaration of Independence	Robert	Parr		AAA Client	412968745	
Declaration Vie	w Document	Parr	07/01/2022	Application	412968745	
© 2022 - ReadyDoc, I Op	en Containing Folder					

Viewing Documents

After selecting a document for viewing, the ReadyDoc Viewer is shown below. The most common options are called out below.



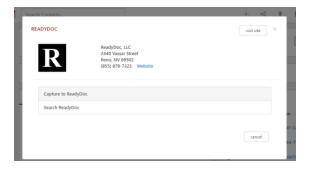
Capturing Documents:

- 1. From the Redtail CRM application, navigate to a client contact record. You must be positioned on a Contact record for the ReadyDoc integration options within Redtail to be visible.
- 2. Click the Integrations icon at the top right of the Redtail CRM window and then click ReadyDoc

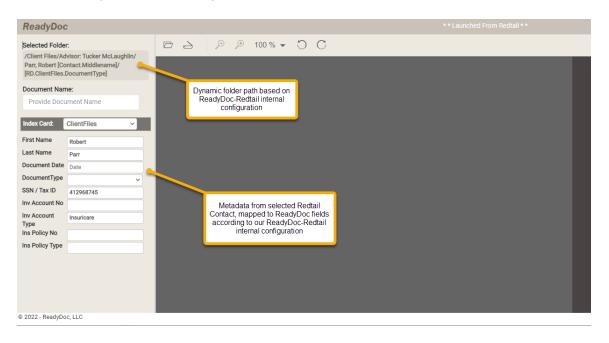
® REDTAIL CRM	Search Contacts				+ %	Ť	8 ?	•
Today Calendar		b" Parr 🏠 pecialist at Insuricare len L Parr The Parr Fami		Filter		L,		Î
Contacts	Manied to Her	ien c'han 1 me han ham	y.					
Robert Parr	-			-			\$0.00	
Accounts	NEXT REVIEW	NEXT ACTIVITY	LAST ACTIVITY	ReadyDoc		KFLOWS	PORTFOLIO BALANCE	
Activities	Past Due and Next 30	Latest Notes	[k i rs			add 🕶	
Descurrents		-						

NOTE: If you do not see the ReadyDoc option in the integrations dropdown, you may need to go to the Integrations window in Redtail and turn it on.

3. At the ReadyDoc popup window, select the Capture option:



4. The default and recommended configuration for the ReadyDoc-Redtail integration is to perform web-based capture. The Web Capture window is shown below:



5. To capture a document, click either the Upload icon, or the Scanner icon if you have a scanner attached to your workstation. Skip to step 10 of the instructions.



6. Upload or Scan a document.

9A. To Import a document, click the Upload icon and select the document from your device.

9B. To Scan a document, click the Scan icon and wait for your scan device to be identified and appear in the Device window, as shown below. Then click the Acquire button.

VAIN Ac	quisition	>
Device	EPSON DS-530 (64-bit)	•
	۲	New document
		Cancel ACQUIRE

Note that the first time the Scan is executed on a given workstation, you will be prompted to download and install the scan component. Please click the option as shown below and follow the prompts to install the component.

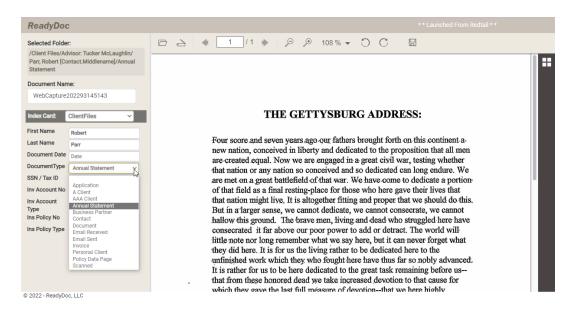


9C. After clicking the Acquire button wait for a few moments for your scanner's Twain scanning dialog to appear and follow your scanner's prompt to scan the document. An Epson scanner is shown below.

Epson Scan 2		-		×
Scanner : EPSO	DS-530(USB)			~
Scan Settings : Not Se	lected			~
Main Settings Advanced Se	tinos			
Document Source :				
	Automatic Feeding N	Node		
Scanning Side :	Double-Sided			1
Document Size :	Auto Detect	~		
Image Type :	Black & White		~	-
Resolution :				
Stitch Images :			~	-
Rotate :			~	-
Correct Document Skew :	Contents Skew		~	-
	Add or edit pages a	fter scann	ing	
Skip Blank Pages :	On		~	-
Detect Double Feed :	Off		~	-
0 0	Preview		Scan	
				_

ReadyDoc-Redtail Integration User Instructions

7. After scanning or uploading the document, it will display in the Web Capture Viewer window. Click the DocumentType dropdown to select a document type for the captured document. The document type is required because it is used to name the subfolder below the Client folder in ReadyDoc, where the document will be stored.



8. Review and change the name of the document as applicable. The document name is one of the key fields when looking at a list of documents in ReadyDoc.

Statement		
Document Nam	ie:	
WebCapture2	02293145143	
Index Card:	ClientFiles	~
First Name	Robert	
Last Name	Parr	
Document Date	Date	

When scanning documents, they will be assigned a default name of *WebCapture<datetime>*. When uploading a document, they will be assigned a default name matching the name of the file that was uploaded.

9. Click the Save icon to save the document. If there are more documents to be captured for the selected Contact in Redtail, they can be captured using the same window.

	ReadyDoc	** Launched From Redtail **							
	Selected Folder: /Client Files/Advisor: Tucker McLaughlin/								
	Parr, Robert [Contact.Middlename]/Annual Statement	Save Changes							
	Document Name:								
	The Gettysburg Address								
	Index Card: ClientFiles ~	THE GETTYSBURG ADDRESS:							
a.	First Name Robert	Four score and seven years are our fathers brought forth on this continent a-							

Results from the Save request:

ReadyDoo	;								* * Launched From Redtail * *
	r: ivisor: Tucker McLaughlin/ ntact.Middlename]/Annual		3 2	• 0	/0 🔶	Ρ	 - D	С	
Document Nam	ne:								
The Gettysbu	irg Address								*
Index Card:	ClientFiles ~	- 8							
First Name	Robert								
Last Name	Parr								
Document Date	Date								
DocumentType	Annual Statement	า 👘							
SSN / Tax ID		i 🗖							
Inv Account No		j 📕							
Inv Account Type	Insuricare								
Ins Policy No									
Ins Policy Type									
Document Sa	ved Successfully								
© 2022 - ReadyDo	c, LLC								

If there are more documents to be captured for the same Redtail Contact, click scan or upload again and repeat the process. Otherwise, to avoid confusion, we recommend closing the Web Capture window before launching Capture requests for additional Contacts from Redtail CRM.