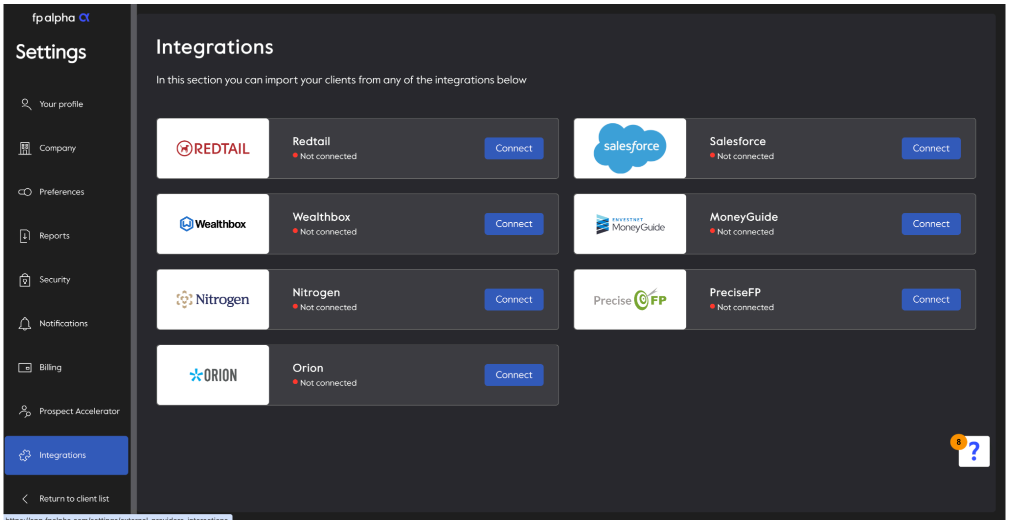
fp alpha

Redtail

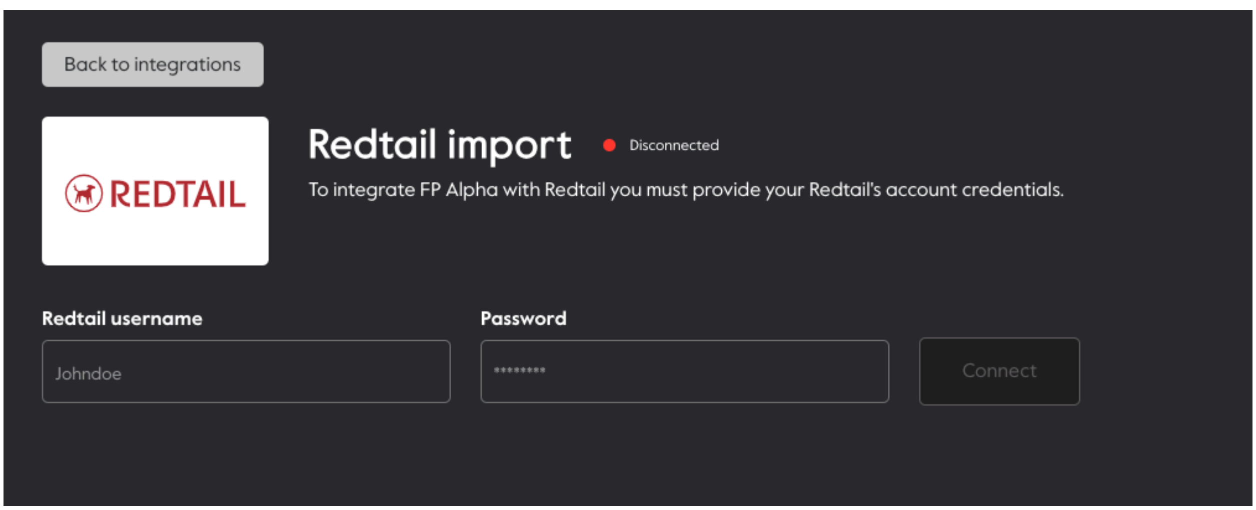
How to Integrate

Setting up the integration

Once you're logged in to your FP Alpha account, navigate to Account > Settings > Integrations. You'll see a screen with all FP Alpha integrations.



Select the Redtail option and it will take you to a new screen, enter your Redtail credentials and click on "Connect" to get started.

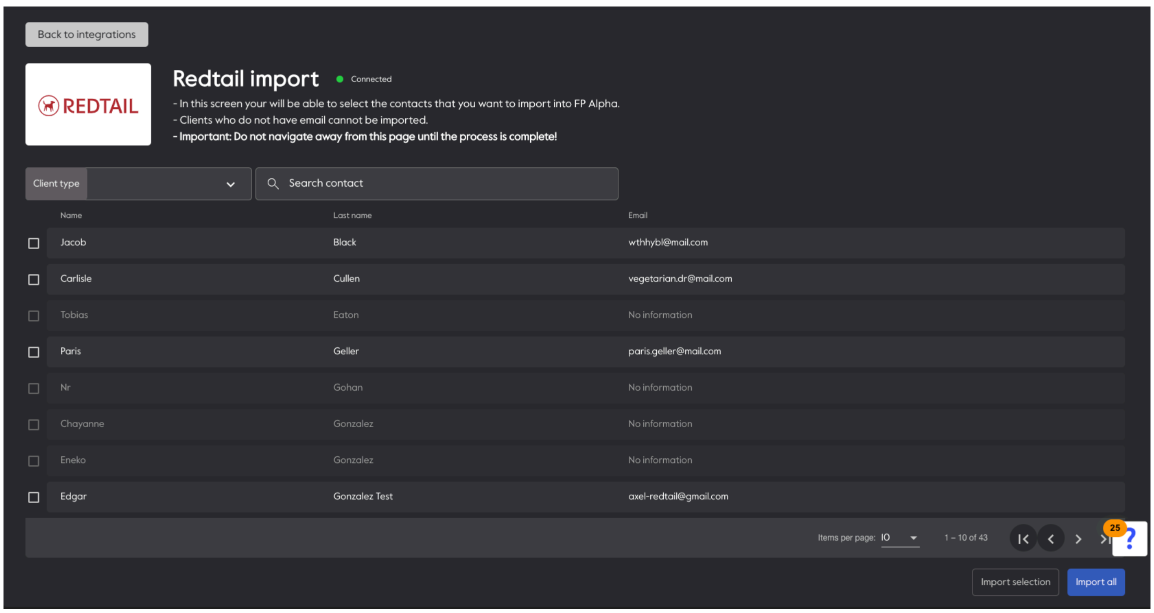


Importing contacts

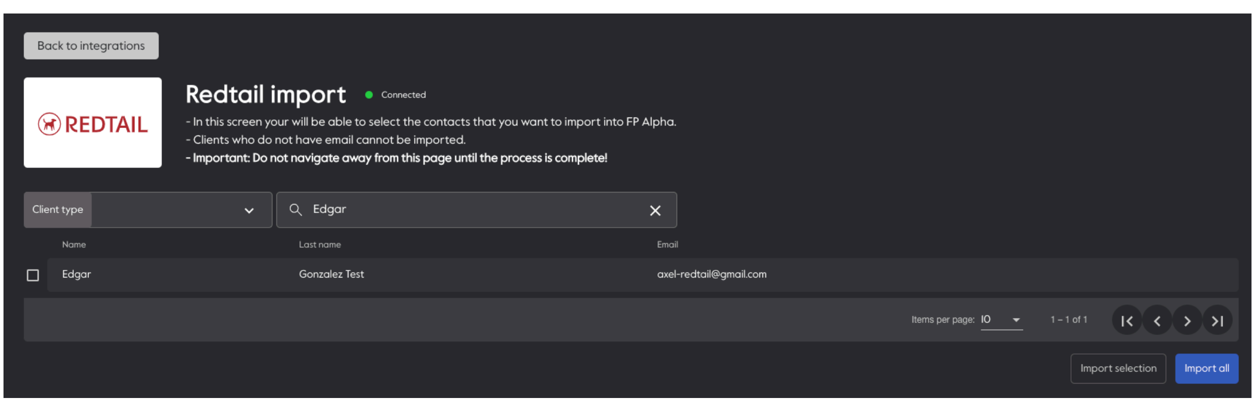
If the authentication is successful, you will be redirected back to FP Alpha to select your clients.

In this section, you'll find all your Redtail contacts. To choose them, simply select the checkbox next to their names.

Note: Clients without email addresses will appear with the checkbox disabled

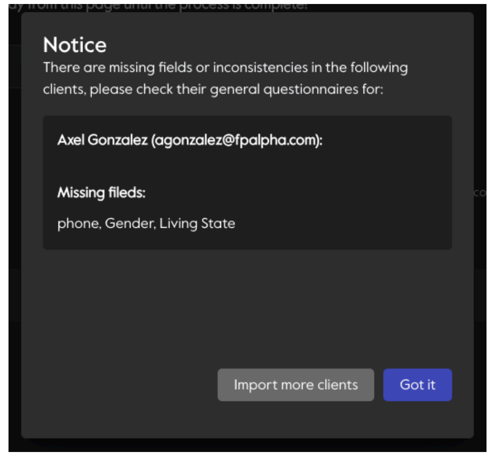


You can filter the results by typing the contact name or email in the *Search Contact* bar or by *selecting a client type* and clicking on *"Enter"*.



After you've finished selecting your contacts, click on 'Import Contacts'.

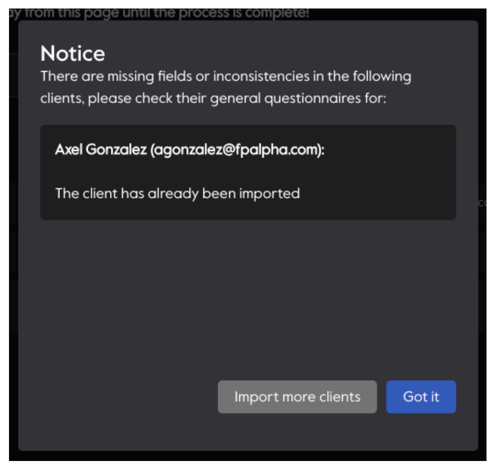
Once the contacts are imported, if no information is missing, you'll be redirected to your Client List. However, if there are missing details, a popup will appear with a message based on the warning issued by the system. Click on 'Got it' to proceed to the dashboard or 'Import More Clients' to continue importing.



Missing required fields

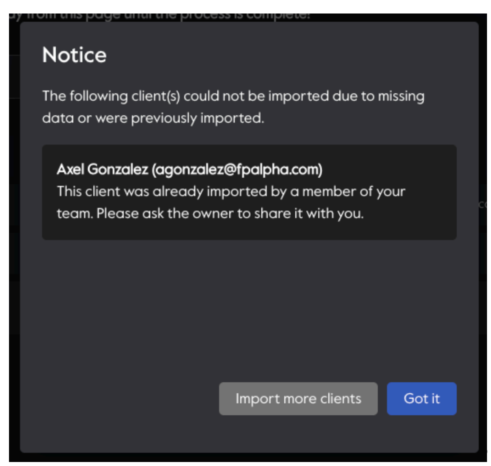
This pop-up will show when there's important information missing from the client.

Only if you see this pop you'll be redirected to the general questionnaire the first time you select the imported client



Client already imported

This popup will show when the client was already imported by you and some of their information was updated due to the re-import

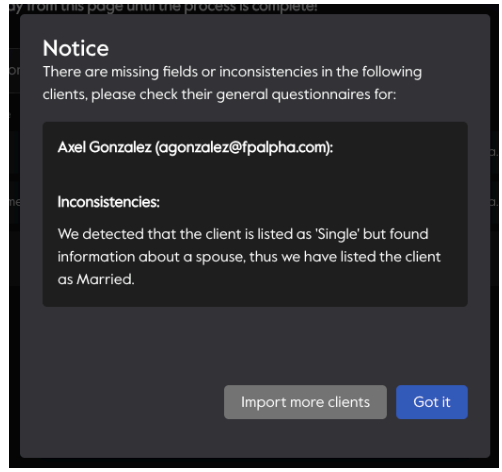


The client was imported by another member of the company

FP Alpha doesn't allow having repeated clients, therefore you'll see this popup if you try to import a client that was already imported by someone in your company.

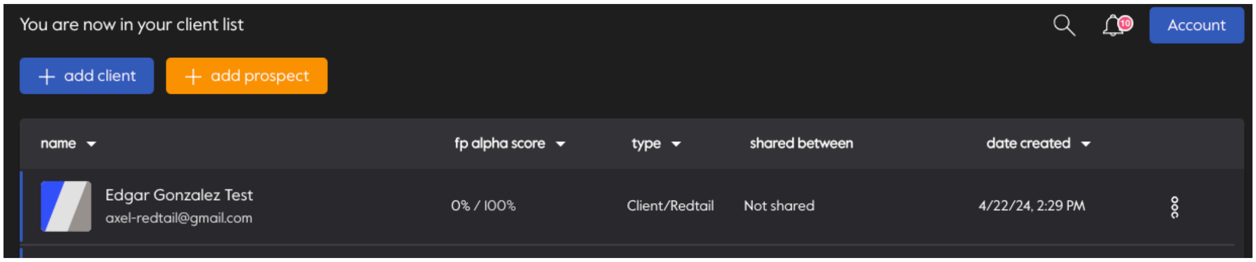
Inconsistencies

If we detected that a client is Single but we found a Co-Client, we need to change the status to 'Married' and you will see an inconsistency. And vice versa



After importing contacts

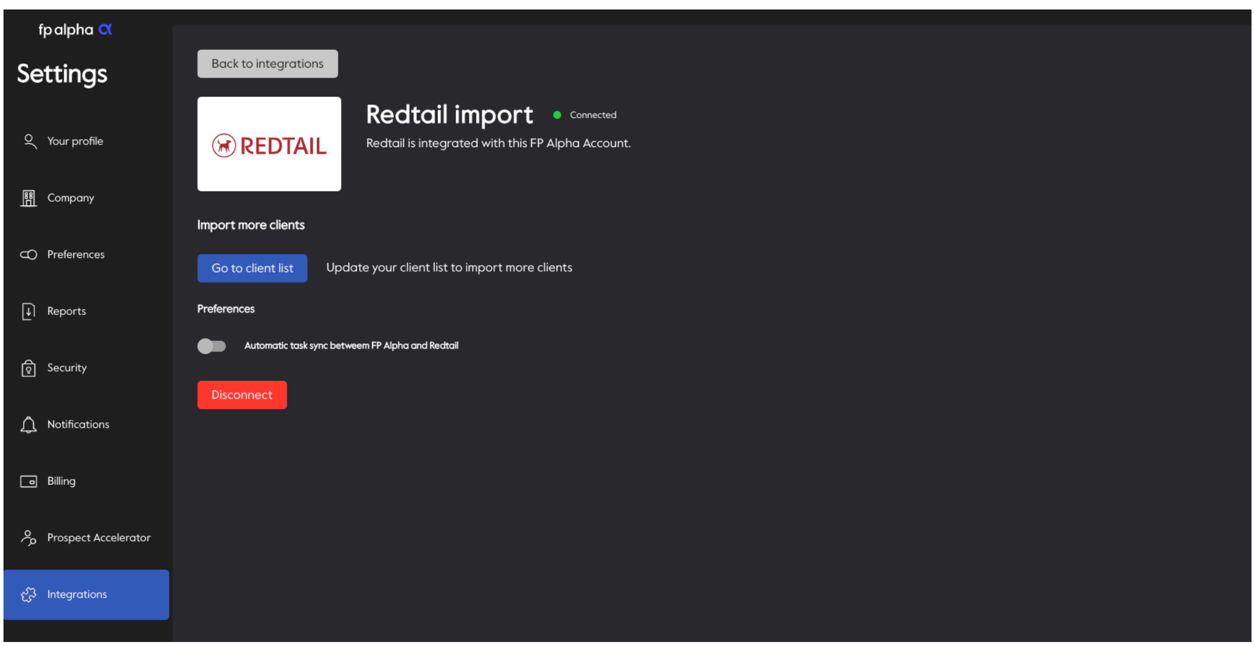
Once the contacts are imported you will be taken to your client list, and your imported contacts will appear with the type 'Client/Redtail'.



We recommend checking the General Questionnaire and filling in any missing information before proceeding with any tasks. We are continually working to integrate more data into FP Alpha.

If you wish to import more contacts later, simply click on 'Import More Clients' and follow the same process.

To disconnect your account, click on 'Disconnect'



Note: Disconnecting your account will not delete the imported clients.

Data Mapping

Personal Information			
FPAlpha	**Redtail**	**Required**	**Comments**
Client			
Marital Status	Contacts/Contact Detail/Marital Status		
First Name	Contacts/Basic Info/First Name	Yes	
Middle Name	Contacts/Basic Info/Middle Name		
Last Name	Contacts/Basic Info/Last Name	Yes	
Email	Contacts/Contact Card/Email	Yes	
Gender	Contacts/Contact Detail/Gender	Yes	
Birthdate	Contacts/Contact Detail/Date of Birth	Yes	
Estate of residence	Contacts/Contact Card/Address/State	Yes	
Is client retired	Contacts/Basic Info/Job Title		No, when this field is empty.
Occupation	Contacts/Basic Info/Job Title		
Net Worth Type			By default, it is a number.
Net Worth			
Net Worth Range			
Non Resident Alien			
Co-Client (In Case Marital Status Is Not 'Single')			
First Name	Contacts/Basic Info/First Name	Yes	
Middle Name	Contacts/Basic Info/Middle Name	Yes	
Last Name	Contacts/Basic Info/Last Name		
Email	Contacts/Contact Card/Email		

Gender	Contacts/Contact Detail/Gender	Yes	
Birthdate	Contacts/Contact Detail/Date of Birth	Yes	
Estate of residence	Contacts/Contact Card/Address/State	Yes	
Is client retired	Contacts/Basic Info/Job Title		No, when this field is empty.
Occupation	Contacts/Basic Info/Job Title		
Net Worth Type			By default, it is a number.
Net Worth			
Net Worth Range			
Non Resident Alien			

Family Information			
FPAlpha	**Redtail**	**Required**	**Comments**
Children			
Name	Contacts/Basic Info/First Name - Middle Name - LastName	Yes	
Date of birth	Contacts/Contact Detail/Date of Birth		
Parent(s)			Automatically add the parents (Client and Co-Client).
Full time college student			
Disability?			
Grandchildren			
Name	Contacts/Basic Info/First Name - Middle Name - LastName	Yes	
Date of birth	Contacts/Contact Detail/Date of Birth		
Other beneficiaries			
Do the clients want to add more beneficiaries?			If other members are found, it is 'Yes'; if not, 'No'.
Name	Contacts/Basic Info/First Name - Middle Name - LastName	Yes	
Relationship	Family/Relationship		

Assets Information			
FPAlpha	**Redtail**	**Required**	**Comments**
Real Estate			
Nickname	Accounts/Account Assets/Asset Name		
Owner/Title	Accounts/Basic Info/Name		If no owner is found, by default it is the Client.
Market Value	Accounts/Account Assets/Balance		
Real Estate Type	Accounts/Account Assets/Type or Accounts/Type		No mapping here.
Location			
Cost Basis			
Business			
Name	Accounts/Account Assets/Asset Name	Yes	
Owner/Title	Accounts/Basic Info/Name	Yes	If no owner is found, by default it is the Client.
Fair Market Value	Accounts/Account Assets/Balance	Yes	
Structure	Accounts/Account Assets/Type or Accounts/Type		No mapping here.
Location			
Ownership Percentage			
Retirement			

Account Type	Accounts/Account Assets/Type or Accounts/Type	Yes	Retail Types // FP Alpha Types
			401(k) => 401(k)
			Indexed Annuity => Other
			Profit Sharing => Other
			Solo 401(k) => 401(k)
			401(a) => Other
			401(k) => 401(k)
			403(b) => 403 (b)
			457 Plan => 457 Plan
			Beneficiary IRA => Other
			Educational IRA => Other
			Non Deductible IRA => Other
			Pension Plan => Other
			Profit Sharing Plan => Other
			Rollover IRA => Other
			Roth IRA => Roth IRA
			SEP IRA => Other
			Simple IRA => Other
			Traditional IRA => Traditional IRA

Nickname	Accounts/Account Assets/Asset Name	Yes	
Owner/Title	Accounts/Basic Info/Name	Yes	If no owner is found, by default it is the Client.
Account Value	Accounts/Account Assets/Balance	Yes	
Beneficiaries			Select all beneficiaries and put them in Fp Alpha.
Contingent Beneficiaries			
Non Retirement			
Account Type	Accounts/Account Assets/Type or Accounts/Type	Yes	Retail Types // FP Alpha Types Brokerage Account => Brokerage/Taxable Cash Management Account => Bank/Savings/Checking Cash or Equivalents => Bank/Savings/Checking Fee-Based Account => Brokerage/Taxable Fixed Annuity => Other

			Separately Managed Account => Brokerage/Taxable Health Savings Account => Other
Nickname	Accounts/Account Assets/Asset Name	Yes	
Owner/Title	Accounts/Basic Info/Name	Yes	If no owner is found, by default it is the Client.
Account Value	Accounts/Account Assets/Balance	Yes	
Beneficiaries			Select all beneficiaries and put them in Fp Alpha.
Contingent Beneficiaries			
Life Insurance			
Type	Accounts/Account Assets/Type or Accounts/Type	Yes	Retail Types // FP Alpha Types Group Life => Term Group Voluntary Life => Term Individual Life => Term Term Life => Term Universal Life => Whole/Cash Value Variable Annuity => Whole/Cash Value Variable Life => Whole/Cash Value Variable Universal Life => Whole/Cash Value Whole Life => Whole/Cash Value
Nickname	Accounts/Account Assets/Asset Name	Yes	
Policy Owner	Accounts/Basic Info/Name	Yes	If no owner is found, by default it is the Client.
Death Benefit Amount	Accounts/Account Assets/Balance	Yes	
Whose Life is Insured?			
Cash Value			
Beneficiaries			Select all beneficiaries and put them in Fp

			Alpha.
Contingent Beneficiaries			
College Saving			
Type	Accounts/Account Assets/Type or Accounts/Type	Yes	Retail Types // FP Alpha Types 529 Plan => 529 Plan Educational Savings Account => Coverdell 529 Plan => 529 Plan UGMA => UTMA/UGMA UTMA => UTMA/UGMA
Plan Nickname	Accounts/Account Assets/Asset Name	Yes	
Custodian	Accounts/Basic Info/Name	Yes	If no owner is found, by default it is the Client.
Account Value	Accounts/Account Assets/Balance	Yes	
Beneficiaries			Select all beneficiaries and put them in Fp Alpha.
Contingent Beneficiaries			
Loan/Liability			
Type	Accounts/Account Assets/Type or Accounts/Type		No mapping here.
Nickname	Accounts/Account Assets/Asset Name	Yes	
Loan Owner	Accounts/Basic Info/Name	Yes	If no owner is found, by default it is the Client.
Loan Amount	Accounts/Account Assets/Balance	Yes	
Interest Rate			