

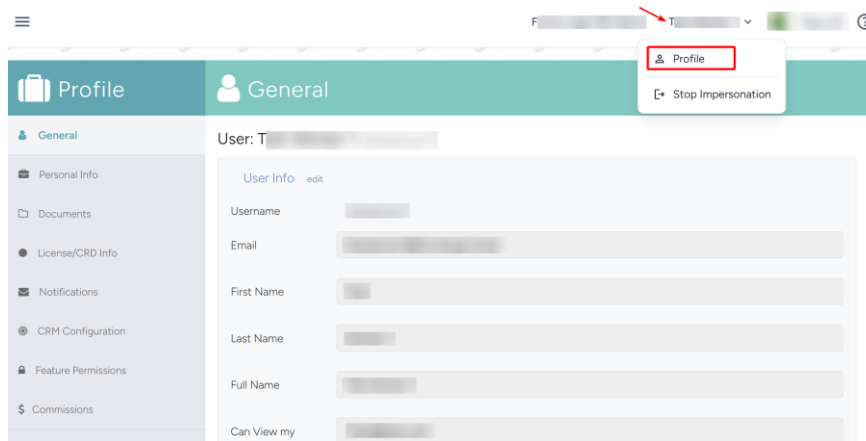
Redtail CRM Integration

OVERVIEW

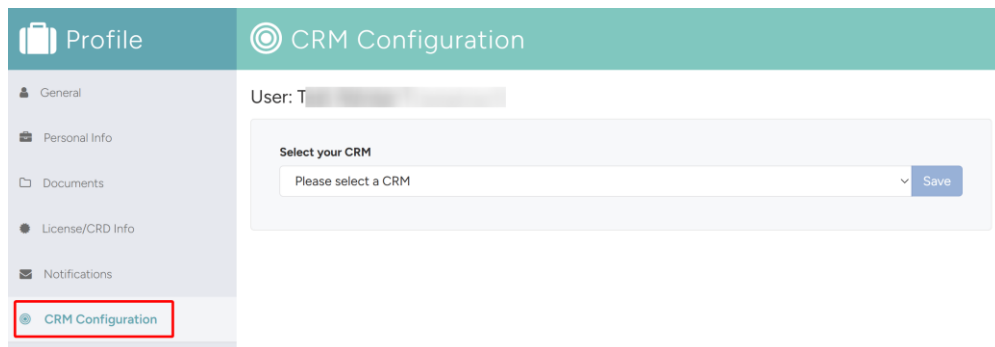
The Redtail CRM Integration connects Forms Logic with your Redtail contact database, allowing you to pull existing client data directly into new account and maintenance workflows. This eliminates manual data entry and ensures workflow information is populated accurately from your CRM.

CONFIGURE IN FORMS LOGIC

1. Click your user name in the upper right and click the **Profile** button from the dropdown. The Profile will load as shown below.

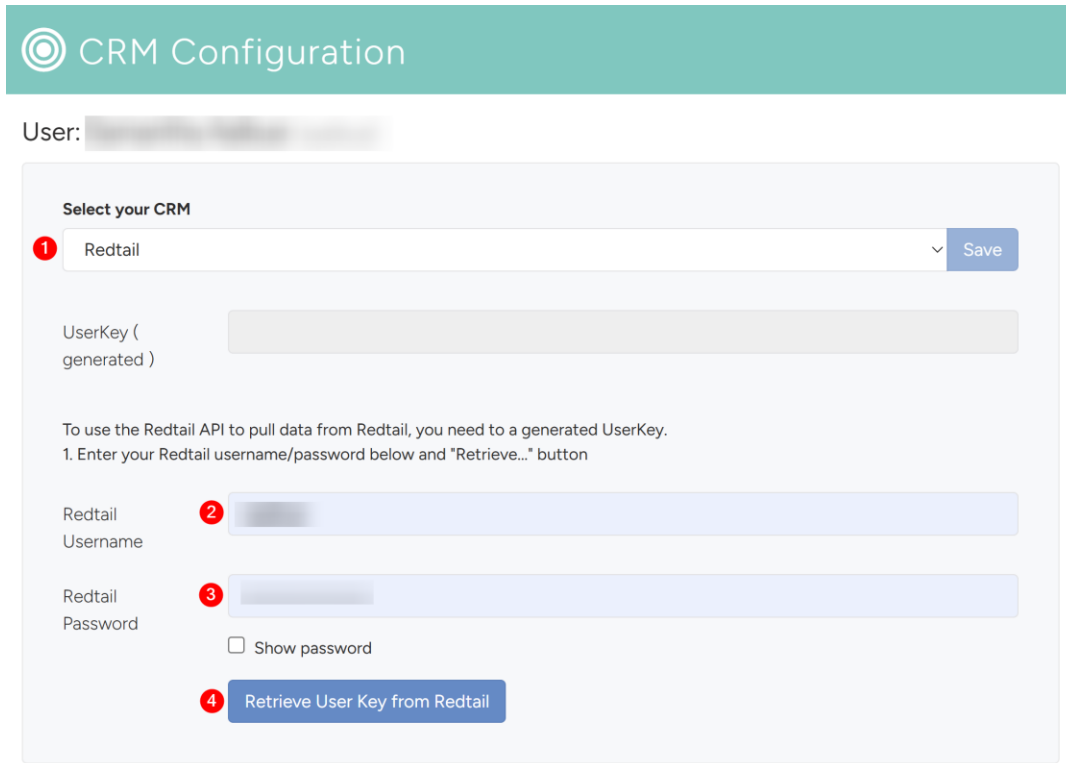


2. Navigate into the **CRM Configuration** tab.



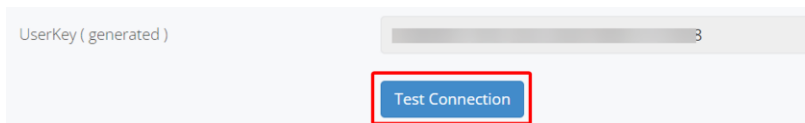
3. To Configure Redtail, follow these steps:
 1. Select Redtail as the CRM and click Save.
 2. Enter your **Redtail Username**.
 3. Enter your **Redtail Password**.

4. Click **Retrieve User Key from Redtail**.



The image shows a 'CRM Configuration' form. At the top, there's a teal header with the 'CRM Configuration' title. Below it, a 'User:' field is partially visible. The main form area has a 'Select your CRM' dropdown menu with 'Redtail' selected, marked with a red '1'. A 'Save' button is next to it. Below this is a 'UserKey (generated)' field. A text block explains: 'To use the Redtail API to pull data from Redtail, you need a generated UserKey. 1. Enter your Redtail username/password below and "Retrieve..." button'. There are two input fields: 'Redtail Username' (marked with a red '2') and 'Redtail Password' (marked with a red '3'). A 'Show password' checkbox is below the password field. At the bottom, there is a blue button labeled 'Retrieve User Key from Redtail' (marked with a red '4').

4. Once the Userkey populates, click the **Test Connection** button to confirm a successful connection.

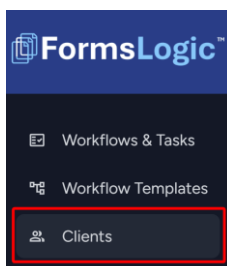


The image shows a close-up of the 'UserKey (generated)' field, which now contains a value ending in '3'. Below it, a blue button labeled 'Test Connection' is highlighted with a red rectangular box.

TESTING THE INTEGRATION

To test the Redtail integration, follow these steps.

1. From the side navigation menu, navigate to **Clients**.



2. Click the **CRM Client Search** tab. In this tab, you can see the User's CRM is set up correctly by the (CRM – OK) under User's CRM. Enter a client's name and click **Search CRM**

CRM Client Search

CRM Clients

User's CRM

Name Search

Q s

Search CRM

3. You will receive a success message and the name of the client will be listed. Click the **Create New Form Workflow** link next to the selected CRM client to create a workflow using the CRM integration.

CRM Client Name	Action
S	Create New Form Workflow
Matching clients: 1	