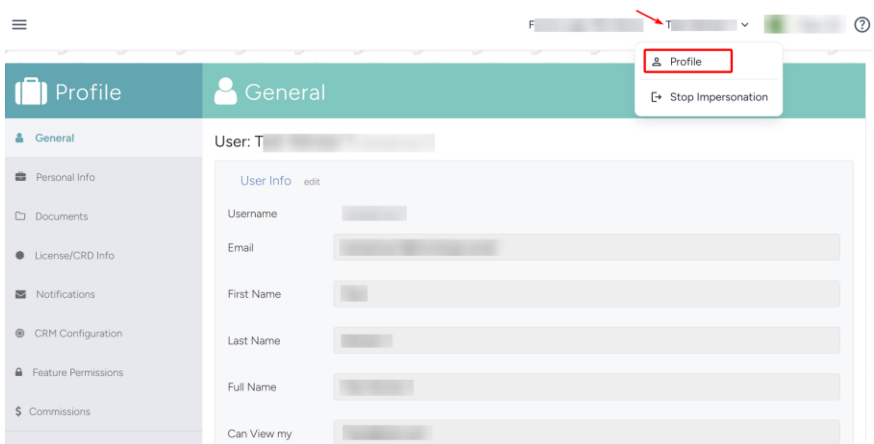
Redtail CRM Integration

OVERVIEW

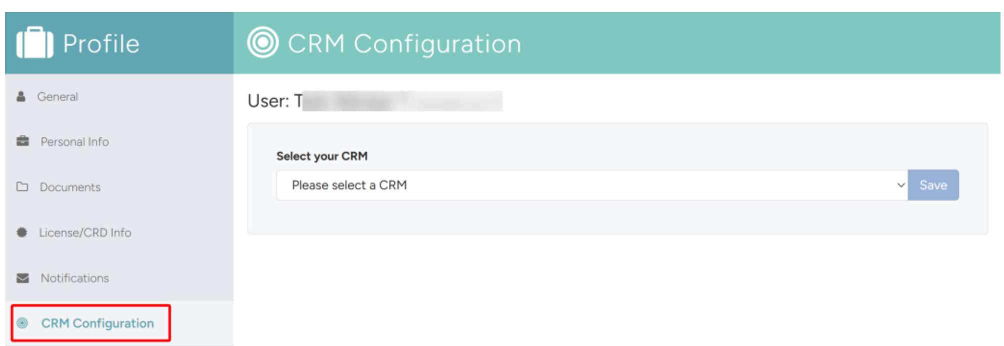
The Redtail CRM Integration connects Forms Logic with your Redtail contact database, allowing you to pull existing client data directly into new account and maintenance workflows. This eliminates manual data entry and ensures workflow information is populated accurately from your CRM.

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.

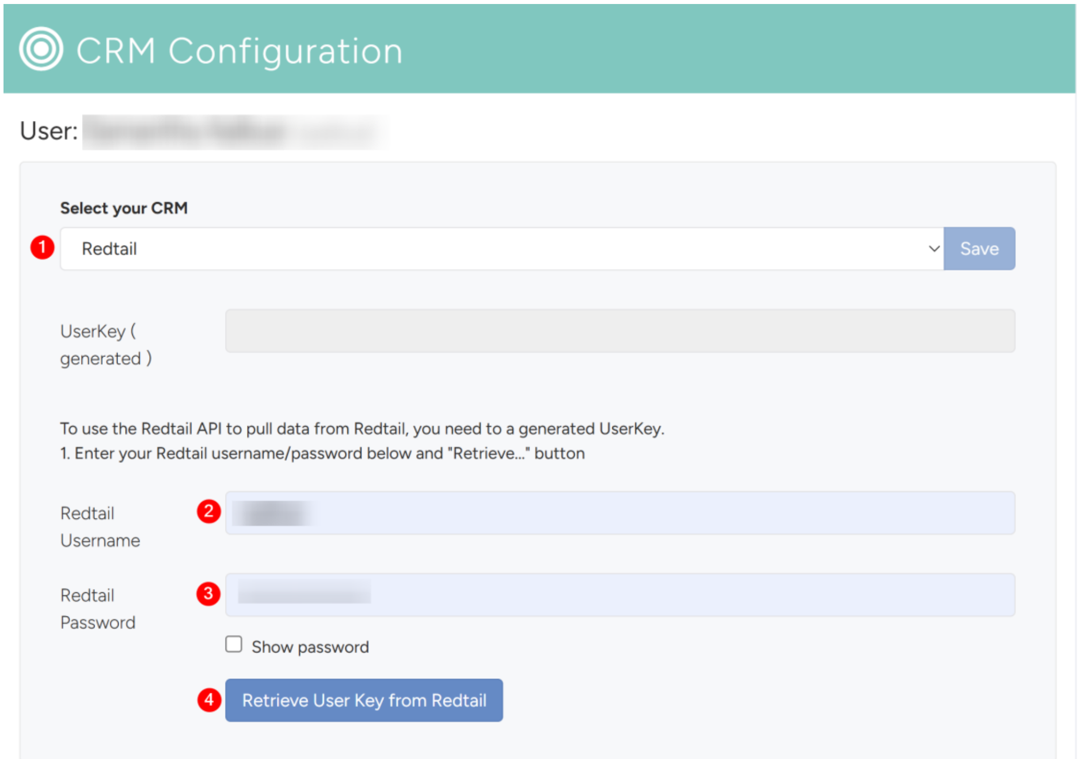


2. Navigate into the **CRM Configuration tab**.

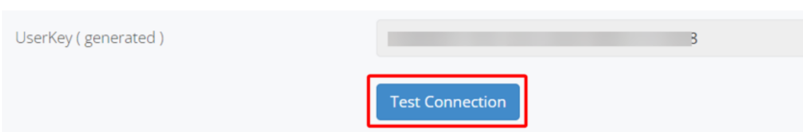


3. To Configure Redtail, follow these steps:
    1. Select Redtail as the CRM and click Save.
    2. Enter your **Redtail Username**.
    3. Enter your **Redtail Password**.

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



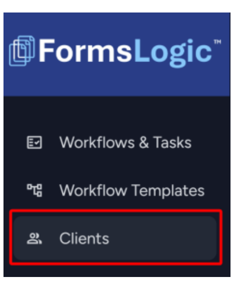
4. Once the Userkey populates, click the **Test Connection** button to confirm a successful connection.



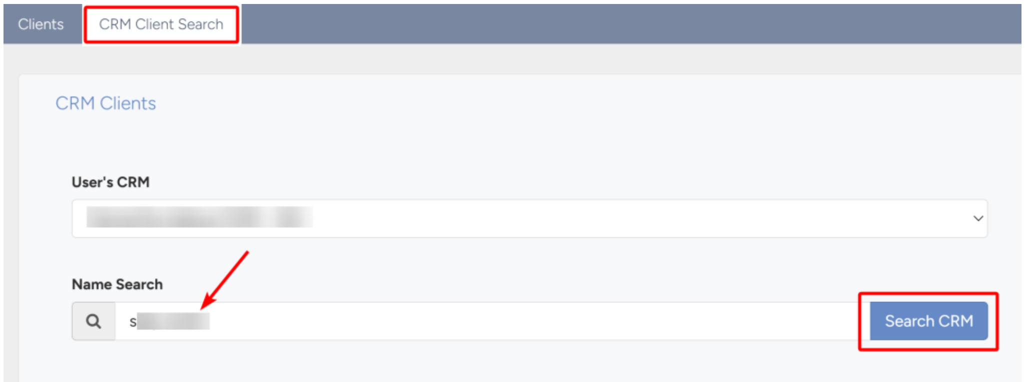
TESTING THE INTEGRATION

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**



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.