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| **Procedure Name:**  | **Adding Clients From Client Central** **to Redtail** | **A picture containing text, clipart  Description automatically generated** |
| **Department:** | Investment Team |
| **Effective Date:** | 11/14/2022 | **Author:** |  Katie Weinschenk |

**Description**

In an attempt to cut down on double entry of client data, we are able to pull clients from Client Central into Redtail.

**Assumptions**

N/A

**Procedure**

1. From Client Central, Click Add Client to Redtail link



1. A Search Box will appear. Type in the client’s last name and click Go
2. Click the box next to the correct client’s name and click Submit



1. The client will now appear in Redtail and you can add any missing information to the client’s Contact Card.

**References**

N/A

**Revision History**

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| --- | --- | --- |
| **Revision Date** | **Revised By** | **Revision Notes** |
| 11/14/2022 | Katie Weinschenk | Procedure Created |
|   |   |   |