|  |  |  |  |
| --- | --- | --- | --- |
| **Procedure Name:** | **Adding Clients From Redtail**  **to Client Central** |  | |
| **Department:** | Investment Team |
| **Effective Date:** | 11/14/2022 | **Author:** | Katie Weinschenk |

**Description**

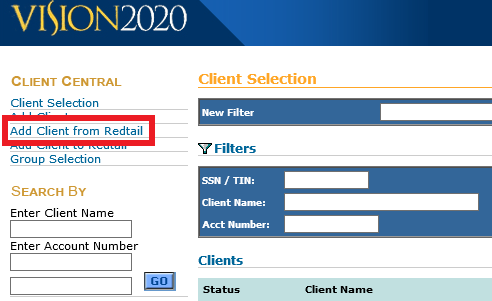
In an attempt to cut down on double entry of client data, we are able to pull clients from Redtail into Client Central.

**Assumptions**

N/A

**Procedure**

1. From Client Central, Click Add Client from 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

Graphical user interface, application

Description automatically generated

1. The client will now appear in Client Central and you can add any missing information to the client

**References**

N/A

**Revision History**

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