

# Integrations: Before You Begin

This guide will illustrate the importance of understanding your integration options and provide an overview of the best way to utilize multiple integrations together. This guide will also explain the significance of the Client import process to ensure efficiency and reduce redundancy.

## Before You Get Started with Integrations:

- ✓ Familiarize yourself with the available integrations and their features. Refer to the [Integration Features](#) Interactive User Guide.
- ✓ Ask yourself which integrations you want to utilize, then review the [Integration Restrictions](#) to check compatibility.
- ✓ Utilize and follow the [Standard Order of Operations](#)

## Order of Operations Overview

This flowchart represents the recommended order of operations when importing and linking Clients from multiple integrations.

The top of each section on the flowchart lists the type of integration, the left-hand side lists the integrations that fit each type, and the right-hand side provides context to the overall workflow (Figure 1).

For example, if your CRM is Redtail, your custodian or brokerage platform is Fidelity, and you also use Riskalyze and Black Diamond, we would recommend that you:

1. *Import* your Client from Redtail, **do not** auto-link accounts
2. *Link* the Client to Fidelity, auto-link accounts
3. *Link* the Client to Riskalyze
4. *Link* the Client to Black Diamond

What if you don't use one of the listed CRM Integrations? Don't worry you can still import a Client from the Connection Based Integrations as well as several others.



Figure 1

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## Importance of Importing Clients Correctly

### Questions to Ask Yourself *Before* Importing Clients:

- ✓ What should be the source of my Client's assets under management?
  - It is possible that the same accounts can be pulled from a CRM Integration like Redtail *and* a Connection Based Integration like Fidelity, Albridge, or Orion. It is imperative to decide where you will pull the accounts from before you begin the import process to avoid duplicating accounts.

### Questions to Ask Yourself *During* the Import Process:

- ✓ Does this Client already exist in eMoney?
  - If the answer is **yes**, use **Link to Existing Client**.
  - If the answer is **no**, use **Import as New Client**.
- ✓ Are the Client's managed accounts already linked through a connection or another integration?
  - If the answer is **yes**, use **No, do not auto-link accounts**.
  - If the answer is **no**, ask yourself if this is the integration you want to pull accounts from. If that answer is **yes**, use **Yes, auto-link accounts**.  
(Figure 2)

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Go back to Clients

### Example Integration

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Turn On Application for Client

1. What would you like to do with Winston Adams?

Link to Existing Client Import as New Client

2. Should we auto-link accounts?  
If yes, all the accounts from Redtail will be automatically linked as new facts.

Yes, auto-link accounts.

No, do not auto-link accounts.

Figure 2

### Why is This So Important?

If you do not utilize the correct *Import as New*, *Link to Existing*, or *Auto-link Accounts* options during the Client import process you **will** create more work for yourself. It is important to have a plan before diving into the integrations so that you do not accidentally duplicate Client profiles and/or accounts.

### Have Questions?

Do not hesitate to Contact Customer Service.

We are here to help!