Flourish

Flourish + Redtail Integration Guide

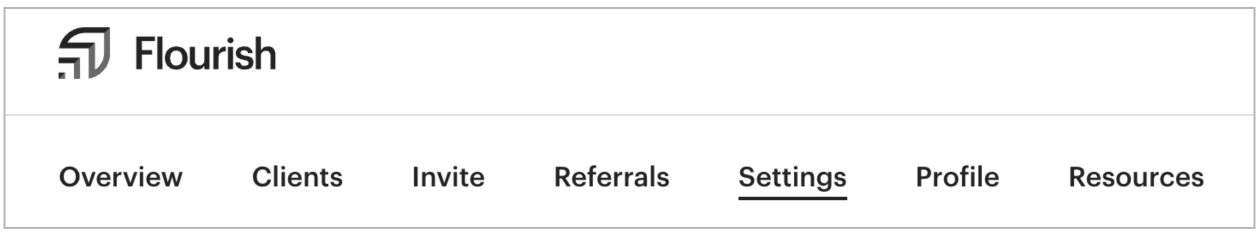
The Redtail + Flourish integration gives advisors the ability to quickly and easily pre-fill end-client applications and then invite clients with the press of a button within Flourish.

Total estimated timeline: ~5 minutes

Step 1: Log in to Flourish

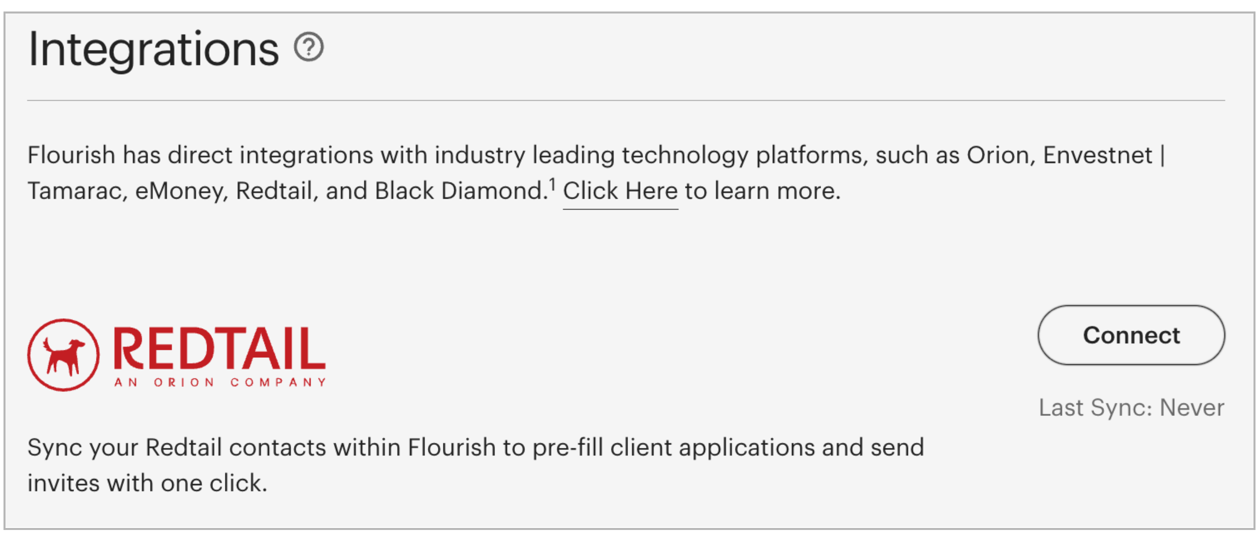
Navigate to Flourish.com and log in using your advisor credentials.

Click **"Settings"** at the top of the Advisor Portal.



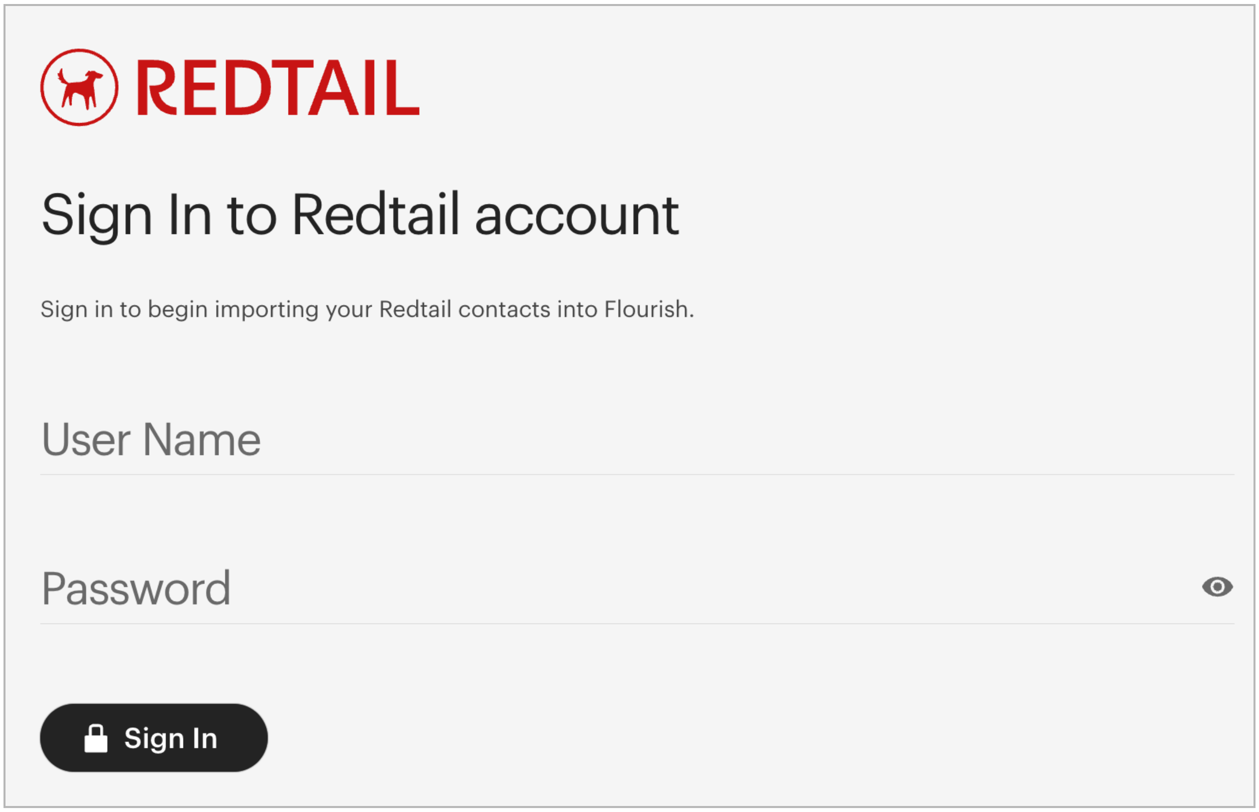
Step 2: Link the Integration

Scroll down to "**Integrations**" and click **"Connect"** next to Redtail.



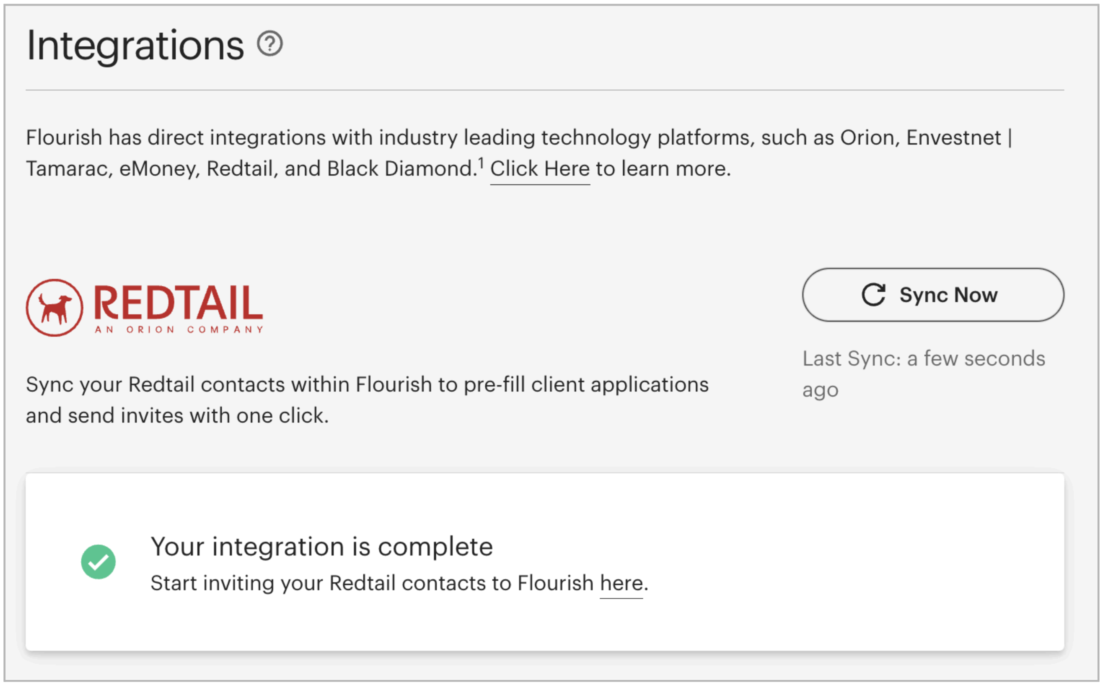
In the pop-up window, enter your Redtail username and password and click **“Sign In.”**

- Please note: it may take a few minutes to authenticate your account.



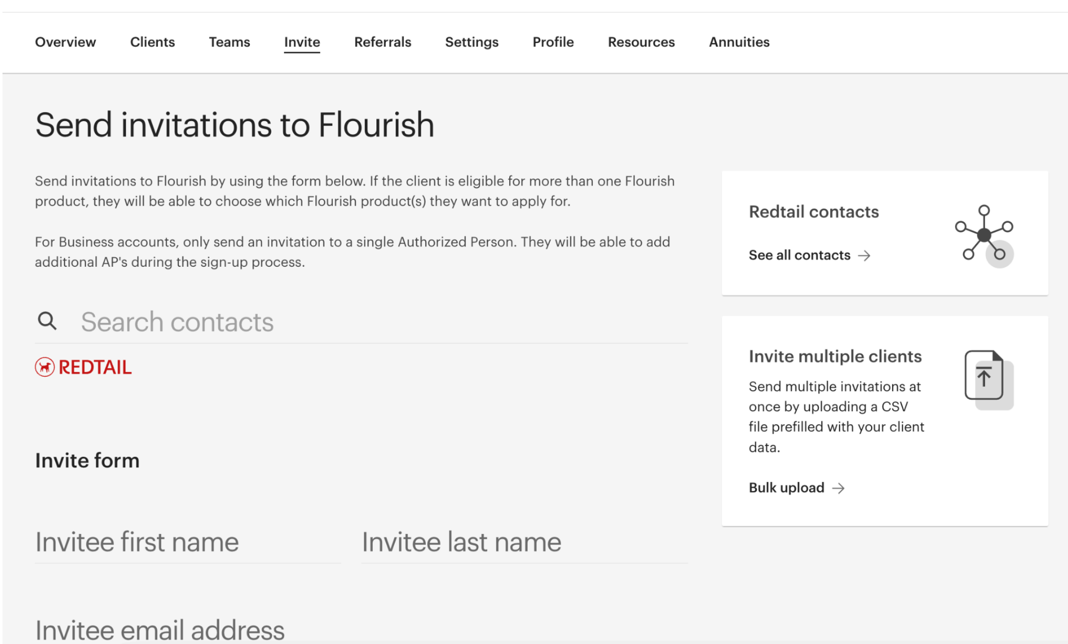
Once the connection is established, you will see a green check mark on the Settings page indicating that the integration is live. To invite your contacts to Flourish, simply click **“here”** on the Settings page, or click on the **“Invite”** tab.

- Note: you can re-sync your data at any time on the Integrations page

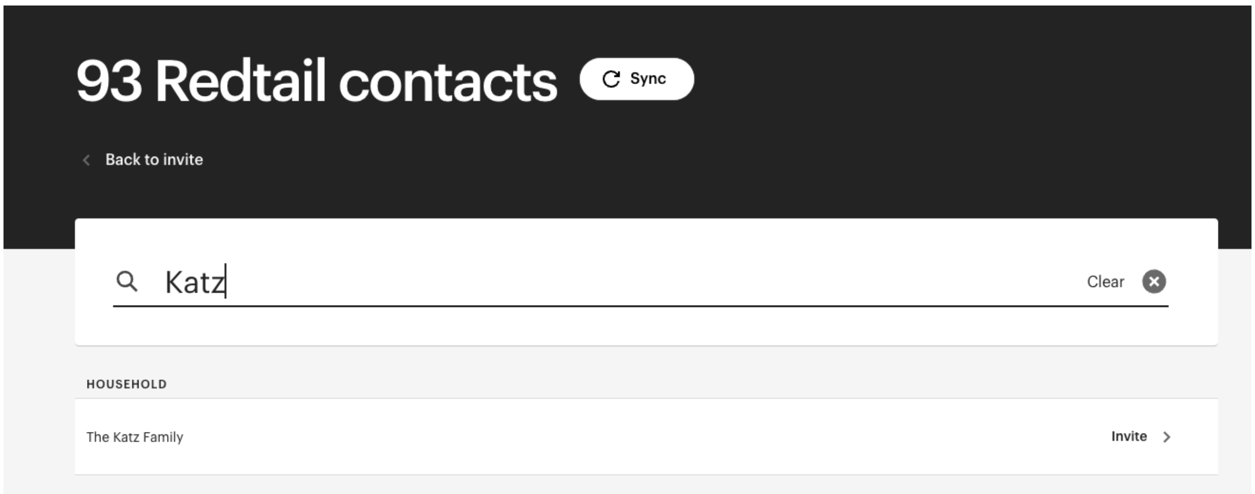


Step 3: Prefilling Client Data & Sending Invites

On the “Invite” tab, enter the name of the contact you would like to invite in the **Redtail search bar** to prefill their information into the **Invite form**.



You can also click **"See all contacts"** in the Redtail module on the right of the screen, to browse from your available Redtail contacts list.
To invite a client, click **"Invite"** next to their name. If they are already invited to Flourish and you would like to view their Household, click **"Manage"** next to their name.



In the invite form fields, confirm your client's first name, last name, and email address, and select **Continue**. From here, you can select which Flourish product you would like to Invite or Apply your client to.

For Flourish Cash, you have two options:

- If you click "**Invite only,**" an invitation email will be immediately sent to the client and you can continue inviting additional clients to Flourish.
- If you click **"Prefill application,"** you'll then have the opportunity to pre-fill the account application on your client's behalf based on data stored in Redtail.
    - You can learn more about Advisor Account Initiation here.

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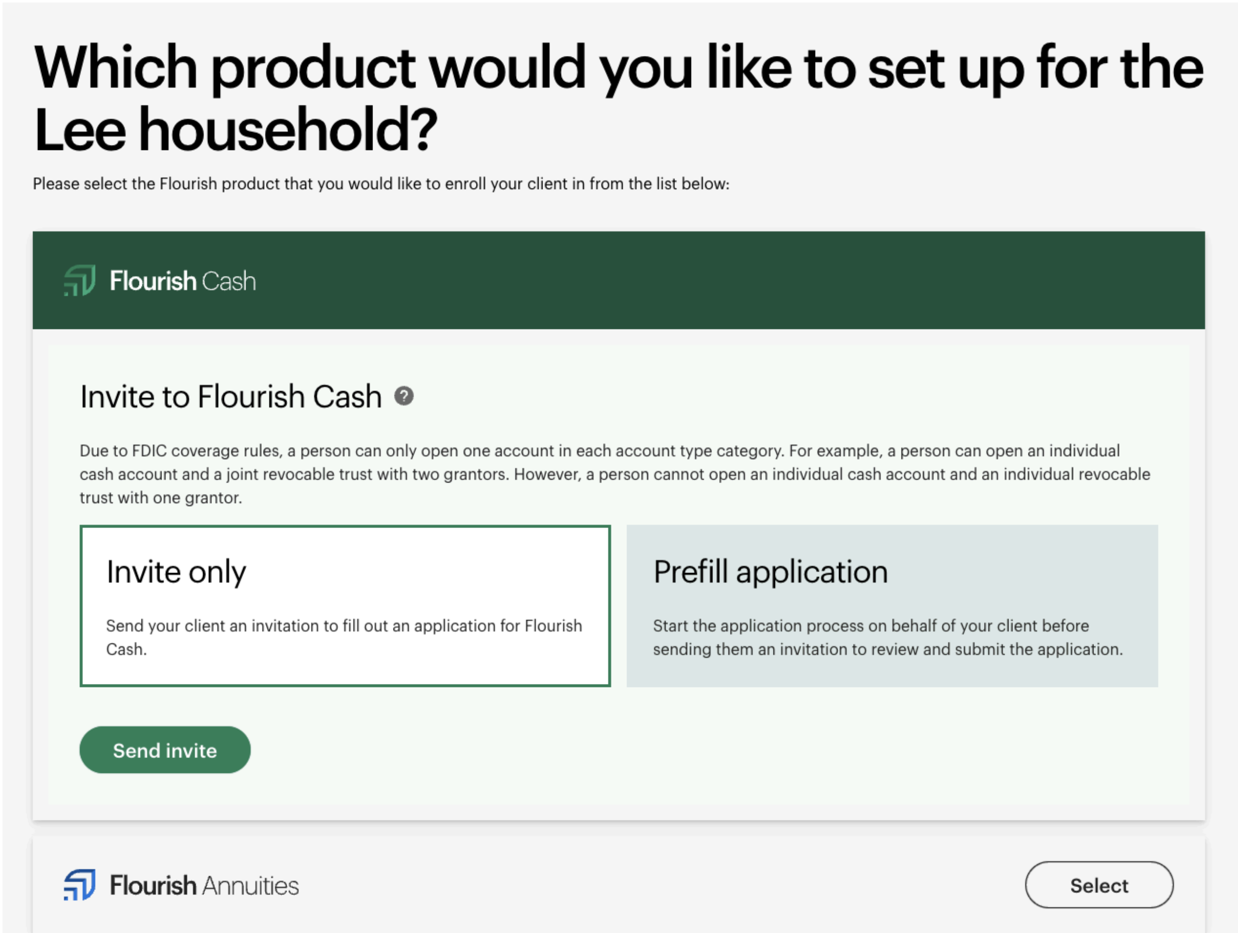
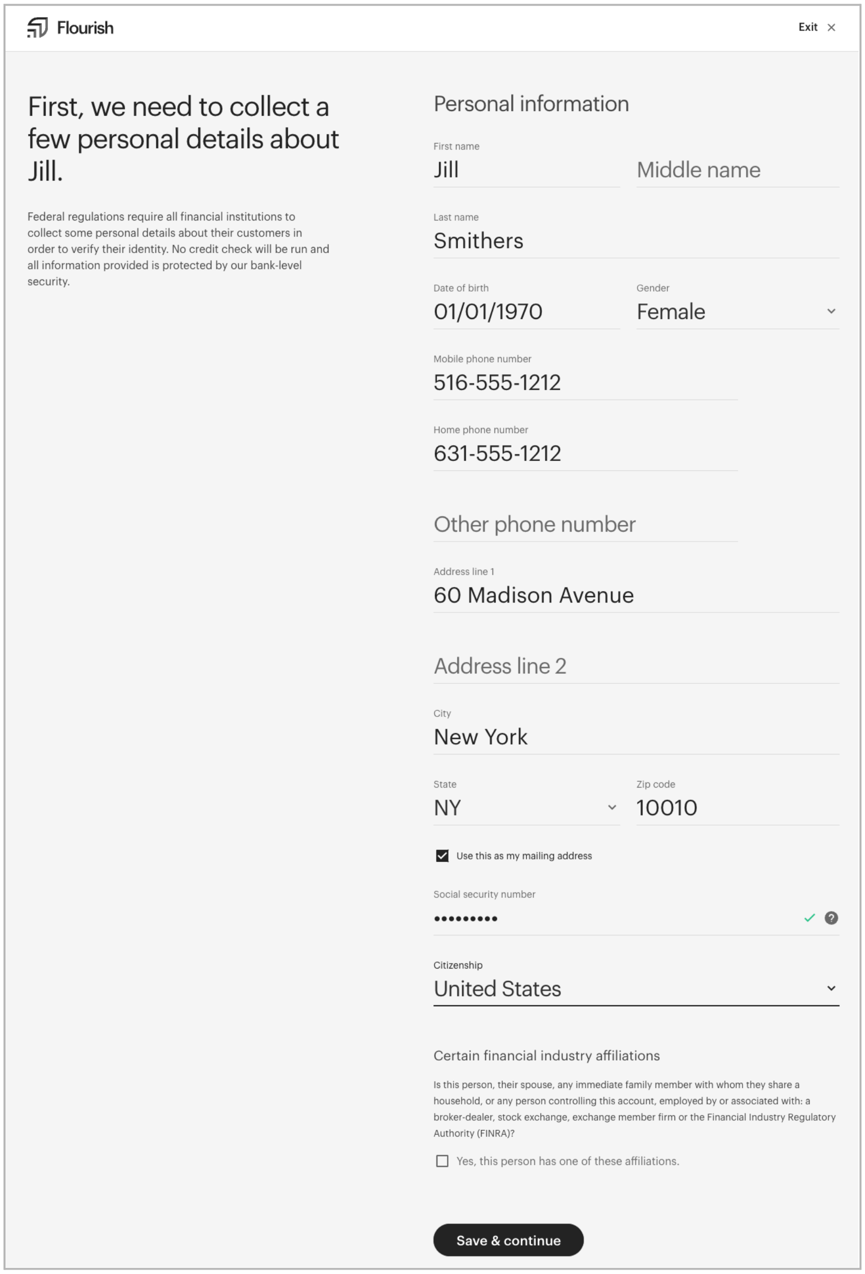


After clicking **“Prefill application,”** you’ll have the opportunity to correct, update or fill out any missing application information. Once complete, click **“Send to client”** to send an email to your client notifying them that you have initiated the application process.

Your client will be prompted to set a password, review the information you’ve submitted, and accept certain legal agreements in order to open the account.



That's it — you're done! Simply return to the "Invite" page in order to send additional invitations using the Flourish + Redtail integration.

Questions / Support

- For any Flourish questions or support, please reach out to integrations@flourish.com

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