

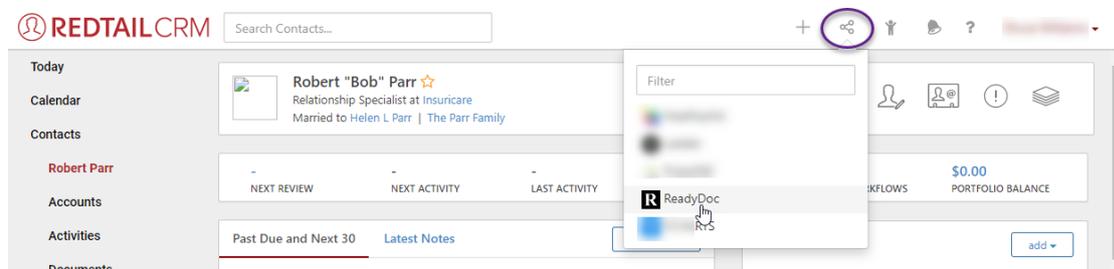
ReadyDoc RedTail CRM Integration

The ReadyDoc integration with Redtail allows for searching for client documents and capturing new client documents from within the familiar confines of Redtail CRM. No Desktop application software is required for Searching or Capturing documents, but users with high scan volumes may still opt to install our *ReadyCapture* desktop application to take advantage of some of its features.

Integration Setup:

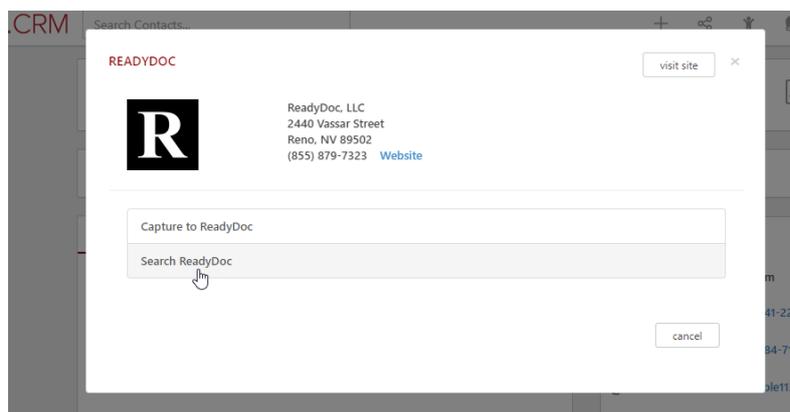
With a valid ReadyDoc account on our new platform at <https://app.readydoc.com>, the integration with Redtail CRM is a free add-on, and can be activated using the following steps:

1. From the Redtail CRM application, navigate to a client contact record. You must be positioned on a Contact record for the ReadyDoc integration options within Redtail to be visible.
2. Click the Integrations icon at the top right of the Redtail CRM window and then click **ReadyDoc**



NOTE: If you do not see the ReadyDoc option in the integrations dropdown, you may need to go to the Integrations window in Redtail and turn it on.

3. At the ReadyDoc popup window, select the Search option:



4. The first time the Redtail integration is selected from a given device, ReadyDoc will prompt for the Redtail credentials. These are saved on the local device in an encrypted cookie and will not be requested again for 60 days, or whenever the login to Redtail CRM from ReadyDoc fails.

(PLEASE SEE NEXT PAGE)

4a. The Redtail Integration Configuration window:

ReadyDoc

Redtail Integration Configuration

Please provide Redtail Configuration settings below and click Test to enable update.

Redtail API URL

Redtail User Name

Password

Use Desktop Capture OFF

Use Desktop Search OFF

Test

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4b Enter your Redtail UserName and Password and click the Test button:

ReadyDoc

Redtail Integration Configuration

Please provide Redtail Configuration settings below and click Test to enable update.

Redtail API URL

Redtail User Name

Password

Use Desktop Capture OFF

Use Desktop Search OFF

Test

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4c. If the credentials were correct you will receive an “Authentication Successful” result. Click “Save Credentials” to continue. If the credentials were incorrect, re-enter them and click Test again.

ReadyDoc

Redtail Integration Configuration

Please provide Redtail Configuration settings below and click Test to enable update.

Redtail API URL

Redtail User Name

Password

Use Desktop Capture OFF

Use Desktop Search OFF

Test

Authentication Successful

User Key

Save Credentials

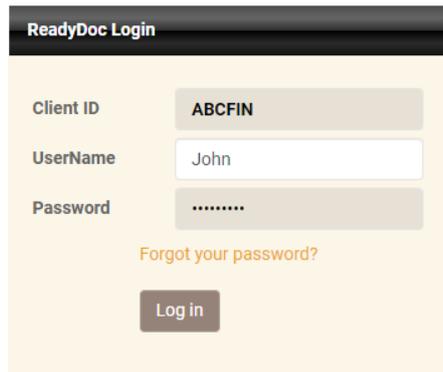
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- 5. After saving the Redtail CRM Username and Password the Redtail Configuration is complete and the Search result window will be displayed. Please see the next sections for an overview of Searching or Capturing documents in ReadyDoc through the Redtail CRM Integration.

ReadyDoc to Redtail CRM – Searching For and Capturing Documents

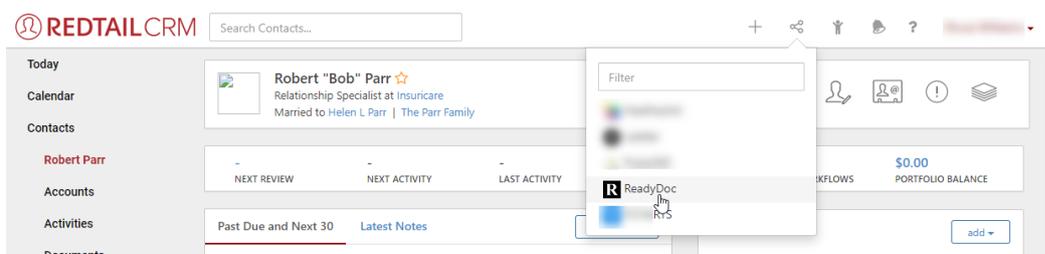
When capturing or searching for documents in ReadyDoc from Redtail, a valid login session to ReadyDoc is required. With this in mind, you might receive a login prompt when executing either the *Search ReadyDoc* or *Capture to ReadyDoc* options. After providing these values you will not be prompted in subsequent Search or Capture requests as long as there is a valid ReadyDoc session. ReadyDoc sessions last 30 minutes from the time of last activity, or until the Logout option is selected from the ReadyDoc Cloud application.

The ReadyDoc login prompt:



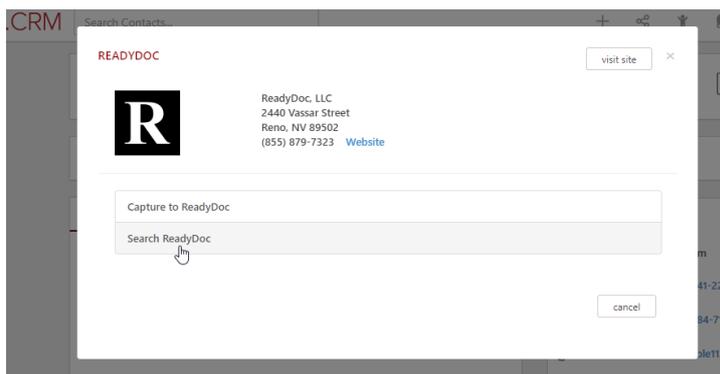
Searching for Documents:

1. From the Redtail CRM application, navigate to a client contact record. You must be positioned on a Contact record in order for the ReadyDoc integration options within Redtail to be visible.
2. Click the Integrations icon at the top right of the Redtail CRM window and then click **ReadyDoc**



NOTE: If you do not see the ReadyDoc option in the integrations dropdown, you may need to go to the Integrations window in Redtail and turn it on.

3. At the ReadyDoc popup window, select the Search option:



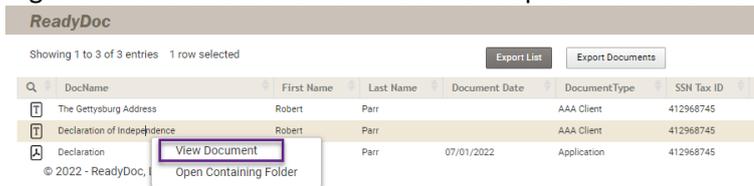
- The Search results for documents in ReadyDoc matching the selected Redtail CRM contact will be displayed.



From the Search results window you can View a document in the list, or open the ReadyDoc Cloud application to the folder that the document can be found in.

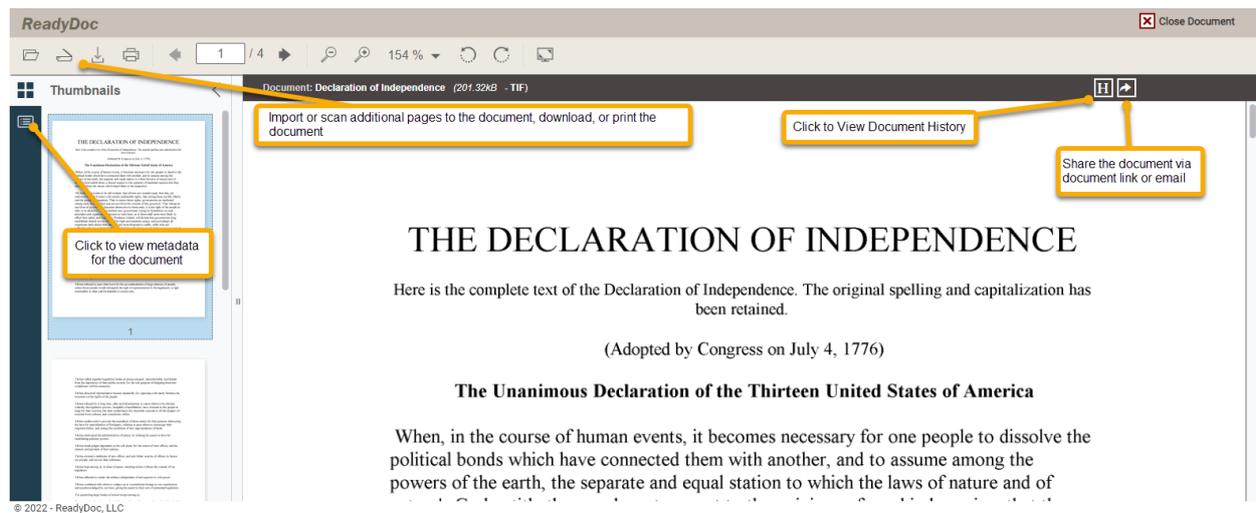
To View a document:

- Double-click on the document row in the Search results
-OR-
Single-click the document icon on the far left in the  column (best for Mobile or Tablet).
-OR-
- Right-click and select the View Document option from the menu.



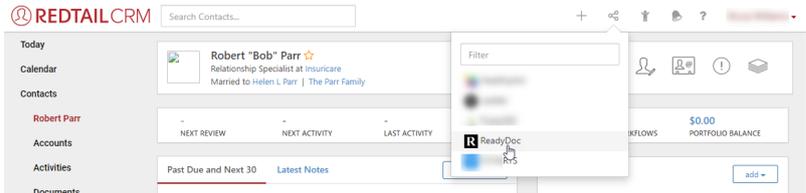
Viewing Documents

After selecting a document for viewing, the ReadyDoc Viewer is shown below. The most common options are called out below.



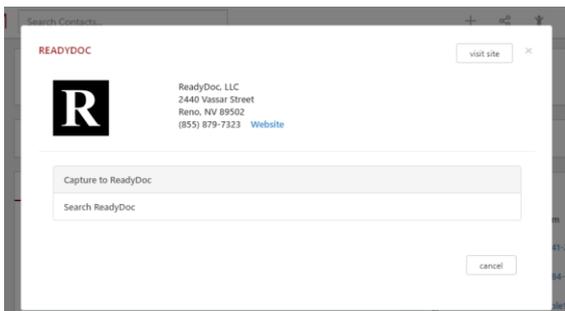
Capturing Documents:

1. From the Redtail CRM application, navigate to a client contact record. You must be positioned on a Contact record for the ReadyDoc integration options within Redtail to be visible.
2. Click the Integrations icon at the top right of the Redtail CRM window and then click **ReadyDoc**

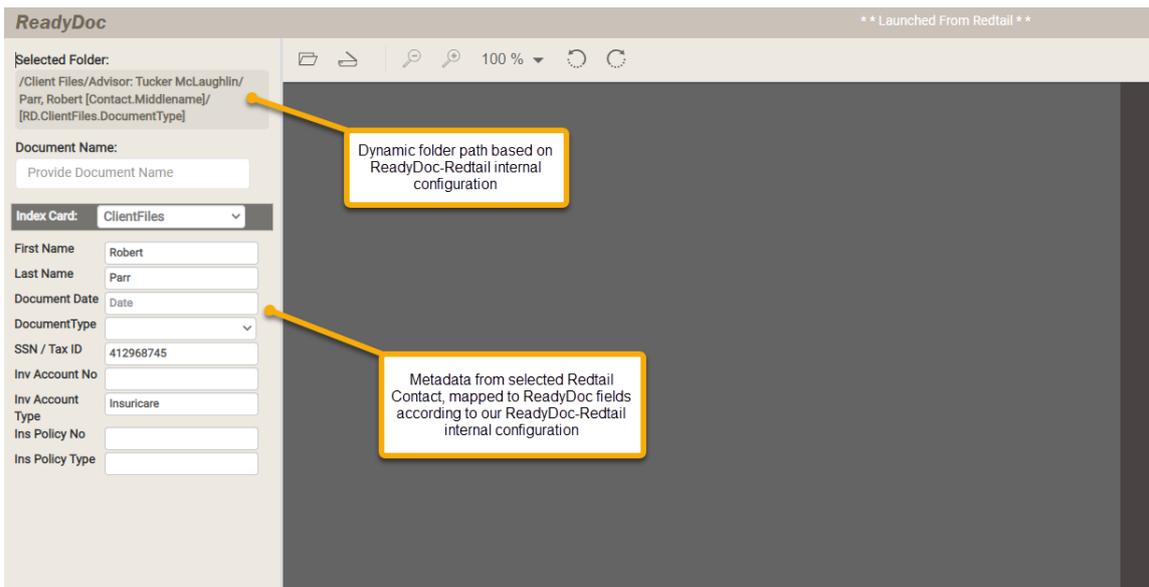


NOTE: If you do not see the ReadyDoc option in the integrations dropdown, you may need to go to the Integrations window in Redtail and turn it on.

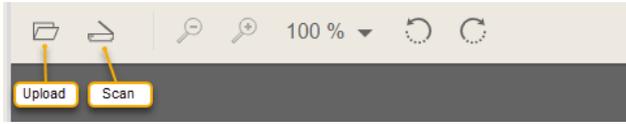
3. At the ReadyDoc popup window, select the Capture option:



4. The default and recommended configuration for the ReadyDoc-Redtail integration is to perform web-based capture. The Web Capture window is shown below:



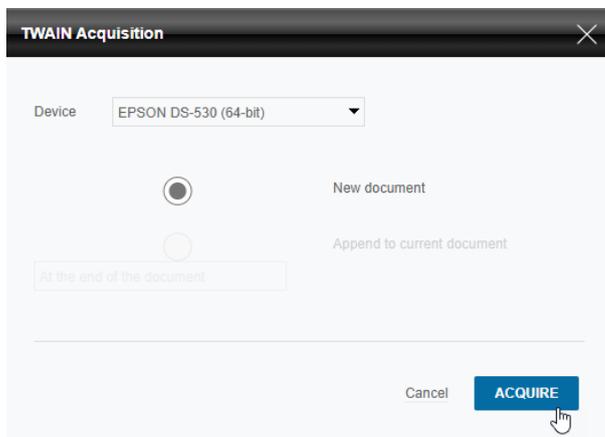
- 5. To capture a document, click either the Upload icon, or the Scanner icon if you have a scanner attached to your workstation. Skip to step 10 of the instructions.



- 6. Upload or Scan a document.

9A. To Import a document, click the Upload icon and select the document from your device.

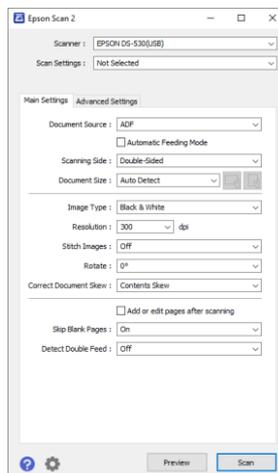
9B. To Scan a document, click the Scan icon and wait for your scan device to be identified and appear in the Device window, as shown below. Then click the Acquire button.



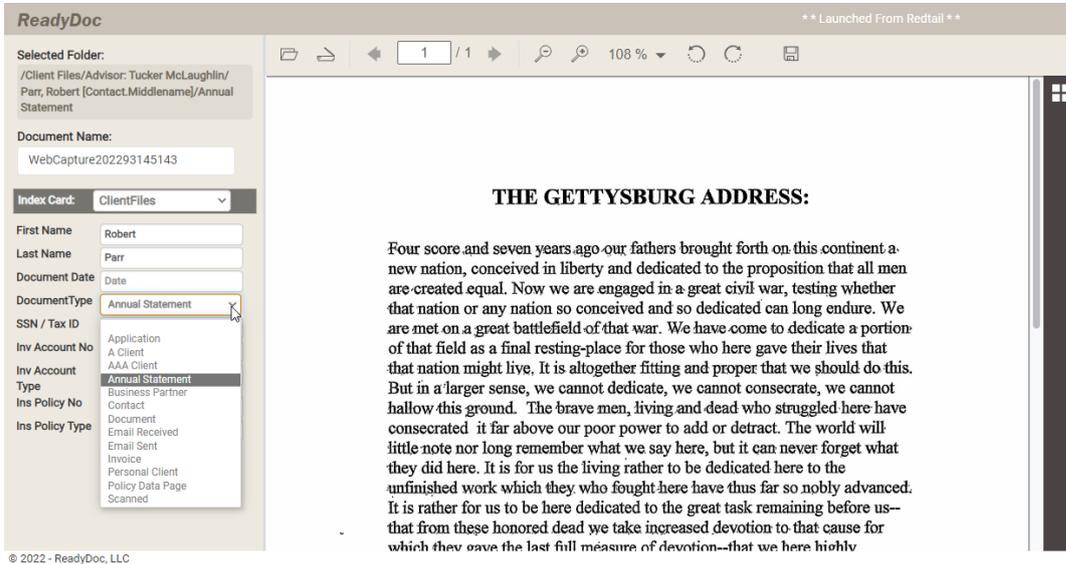
Note that the first time the Scan is executed on a given workstation, you will be prompted to download and install the scan component. Please click the option as shown below and follow the prompts to install the component.

Docuvieware TWAIN Web Connector is not available or not running or not installed.
You can download the latest version [here](#).

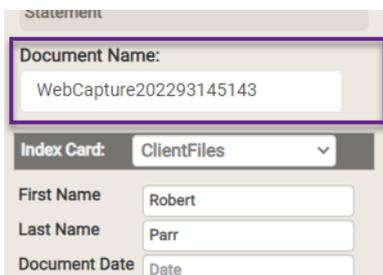
9C. After clicking the Acquire button wait for a few moments for your scanner's Twain scanning dialog to appear and follow your scanner's prompt to scan the document. An Epson scanner is shown below.



- 7. After scanning or uploading the document, it will display in the Web Capture Viewer window. **Click the DocumentType dropdown to select a document type for the captured document.** The document type is required because it is used to name the subfolder below the Client folder in ReadyDoc, where the document will be stored.



- 8. Review and change the name of the document as applicable. The document name is one of the key fields when looking at a list of documents in ReadyDoc.



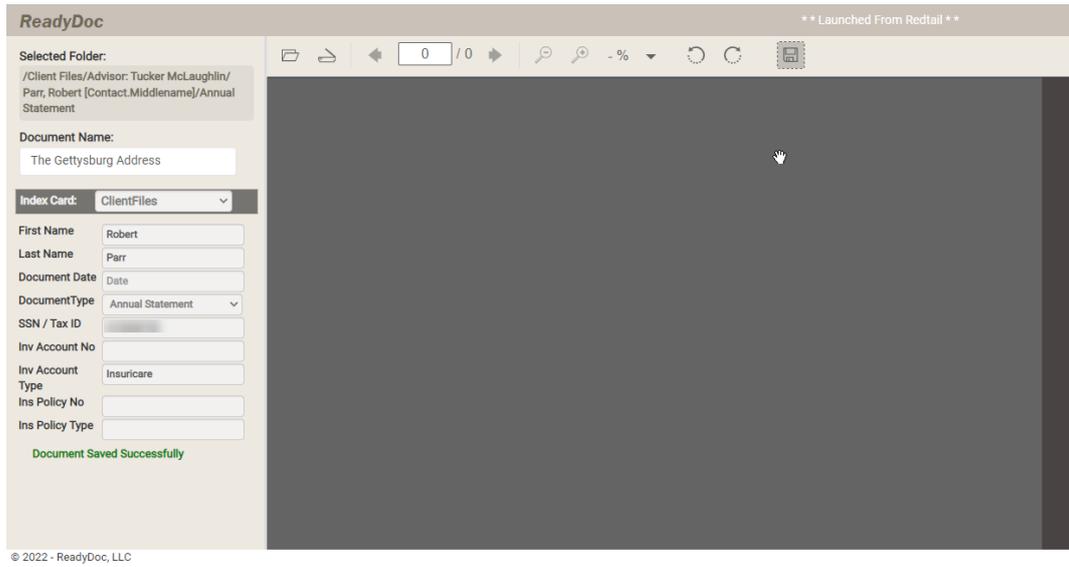
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When scanning documents, they will be assigned a default name of *WebCapture<datetime>*. When uploading a document, they will be assigned a default name matching the name of the file that was uploaded.

- 9. Click the Save icon to save the document. If there are more documents to be captured for the selected Contact in Redtail, they can be captured using the same window.



Results from the Save request:



If there are more documents to be captured for the same Redtail Contact, click scan or upload again and repeat the process. Otherwise, to avoid confusion, we recommend closing the Web Capture window before launching Capture requests for additional Contacts from Redtail CRM.