

Redtail News

July 2021



Release Note Focus

New filter allows you to quickly spot items on your Redtail CRM Calendar

A "filter events" box has been added to the Redtail Calendar that will allow you to quickly and easily search the subject, description, linked contacts, and location fields for all items on your current view of your Calendar.

[Learn more here](#)



Ten Questions to Evaluate a CRM System

Redtail CEO Brian McLaughlin recently shared these ten questions geared toward putting advisors on a path where they can assess their CRM needs confidently in order to determine the right fit for their business.

[Read the piece at Advisor Perspectives here](#)



Redtail's Best Paw Forward Photo Challenge June winner

Basil took the top prize in June and will be featured in our assortment of CRM login pages for the month of July! Click below to see our two runners-up for the month, who will also show up to welcome you on our login pages, as well as the other contenders. [Challenge details available here.](#)

[View winner and runners-up](#)



Manage your CRM series: an ongoing Redtail resource

Redtail CRM offers you a ton of opportunities to customize your CRM, both at the individual and at the database level. We began publishing a series to our blog in May that will run until we've covered all of your avenues for CRM customization. Read the June installment of this series now:

Upcoming webinars [view all >](#)

How to Handle Employee Departure

Thursday, July 8, 11:00am Pacific

[Learn more >](#)

Practice Management Takeover with Amanda Jarvis, Senior Business Consultant with Cetera Financial Group

Tuesday, July 13, 10:00am Pacific

[Learn more >](#)

Redtail Essentials: Automations

Thursday, July 15, 11:00am Pacific

[Learn more >](#)

Best Practice Partner Spotlight - AdvicePay

Tuesday, July 20, 11:00am Pacific

[Learn more >](#)

Calendar Syncing

Thursday, July 22, 11:00am Pacific

[Learn more >](#)

Using The CRM Daily

Thursday, July 29, 11:00am Pacific

[Learn more >](#)

Redtail Speak Overview Demo

Live Every Monday at 11:00am Pacific

[Learn more >](#)

Redtail CRM Overview Demo

Live Every Tuesday at 11:00am Pacific

[Learn more >](#)

30 Minute QuickStart

Live Every Wednesday at 11:00am Pacific

[Learn more >](#)

Our webinars are free to users. Bookmark our [Upcoming Webinar](#) page or follow us on social media to stay up-to-date on our upcoming webinars.

Access Redtail CRM anywhere



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