

Redtail News

June 2021



Release Note Focus

May updates streamlined the Workflow Template creation process

You'll find the process of setting up and maintaining your workflows is now much more streamlined, as it involves far fewer clicks and keeps everything to do with the template in front of you as you are working.

[Read more here](#)



Redtail's Best Paw Forward Photo Challenge May winner

Bonnie took the top prize in May and will be featured in our assortment of CRM login pages for the month of June! 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

Manage your CRM series: a new 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 May installments of this series now:

[How to customize your General Options preferences](#)

[How to customize your Activity Management preferences](#)



In January 2020, we kicked off our [**Advisor Hero campaign**](#). You can [**nominate Advisor Hero candidates here**](#).

Read about our latest heroes, Greg Hammond and Scott Iles, [here](#)

What's new in integrations?



The new [**PlantechHub**](#) integration with Redtail links advisors to their Redtail CRM database, searches for Redtail contacts to link to a plan, and pulls account data and asset balances.

[**Learn more >**](#)



This integration allows Redtail and [**StratiFi**](#) customers to sync their Prospect, Client, and Household data from Redtail into StratiFi to see their risk profile and portfolio risk and have oversight on accounts.

[Learn more >](#)

Upcoming webinars [view all >](#)

New Partner Spotlight - Knudge

Tuesday, June 1, 11:00am Pacific

[Learn more >](#)

Redtail Essentials: Permissions

Thursday, June 3, 11:00am Pacific

[Learn more >](#)

Practice Management Takeover - Neal Quon: People, Process, and Technology

Tuesday, June 8, 10:00am Pacific

[Learn more >](#)

Segmenting Your Client Data

Thursday, June 10, 11:00am Pacific

[Learn more >](#)

New Partner Spotlight - Altigo

Wednesday, June 16, 10:00am Pacific

[Learn more >](#)

Redtail Essentials: Documents

Thursday, June 17, 11:00am Pacific

[Learn more >](#)

Cleaning Up Bad History

Thursday, June 24, 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.



Join Us Virtually @ INSITE 2021

Did you hear that INSITE is virtual this year? And it's free.

How it is going to work is that you will be able to join each day, June 8-10, from 11am-noon ET for a mainstage program, including:

- Organizational psychologist and bestselling author, **Adam Grant**
- CNN Chief Medical Correspondent, **Dr. Sanjay Gupta**
- Tony and Grammy award winner, **Leslie Odom, Jr.**
- **Rosie Rios**, the 43rd US Treasurer

Then in addition to these live sessions, throughout the month of June, you can view on-demand content and podcasts with a very impressive list of industry leaders. You will also have the opportunity to check out Redtail's on-demand session.

Grab your virtual seat and register today at BNYMellonINSITE.com.

[Register now!](#)

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