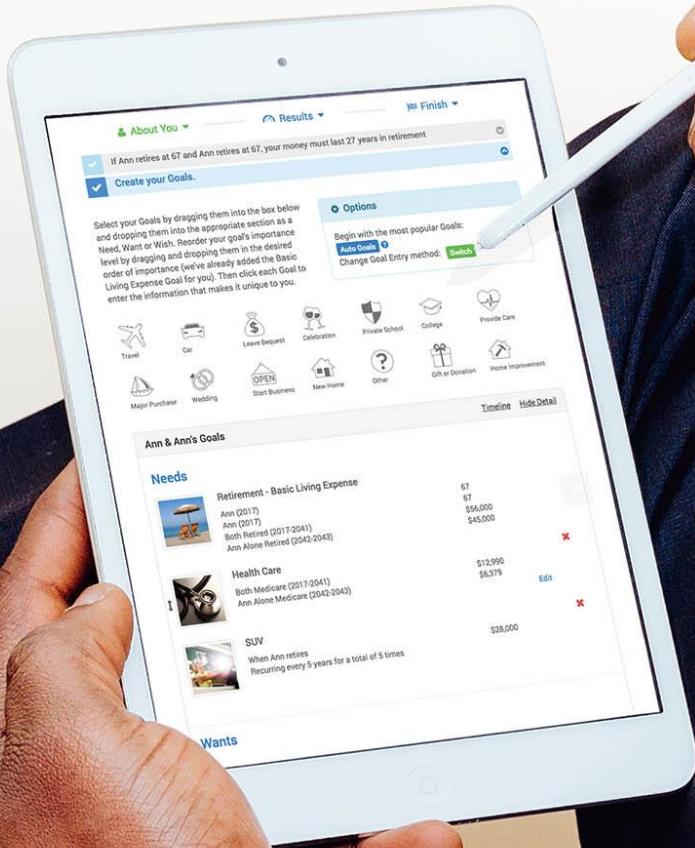




# MoneyGuidePro<sup>®</sup>



Capitect

# Capitect

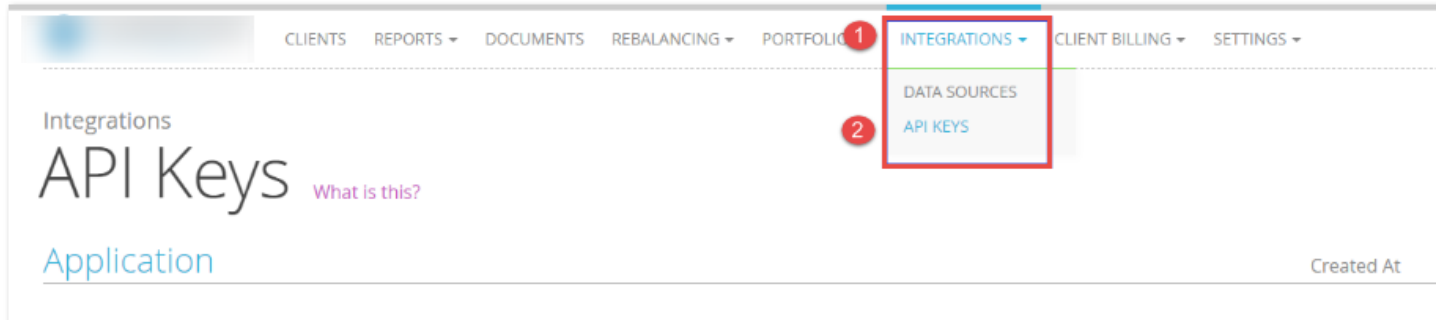
## Table of Contents

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## Obtaining API Key from Capitect.

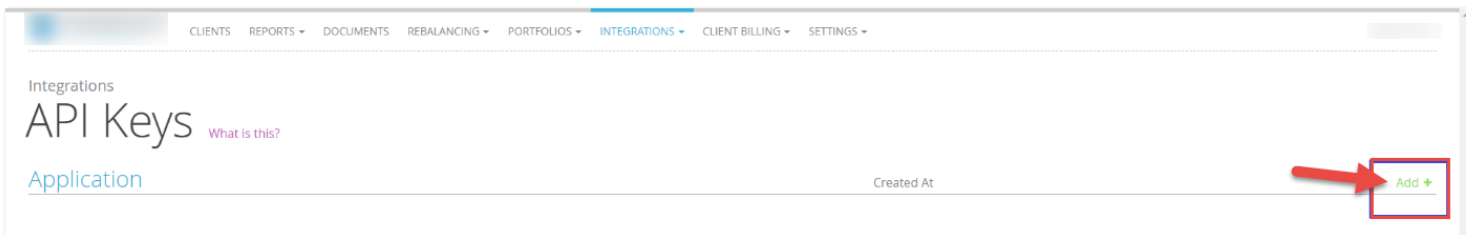
### Step 1:

Login to Capitect, from the navigation bar select Integrations (1) and then API Keys (2).



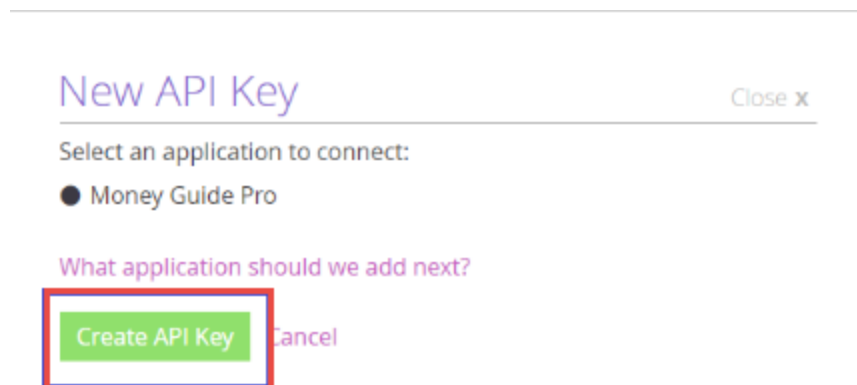
### Step 2:

Select Add.



### Step 3:

Select Create the API key for MoneyGuidePro.



#### Step 4:

Copy the Capitect ID (1) and API key (2) to paste into MoneyGuidePro. This information will be used in [Step 3](#) of the next section, Linking MoneyGuidePro and Capitect.

### Money Guide Pro API Key Close x

Enter these API credentials into **Money Guide Pro** to share your data:

Capitect ID  
usr [REDACTED] **1**

API Key  
685 [REDACTED] **2**

You can revoke **Money Guide Pro's** access to your data at any time by deleting this API key.

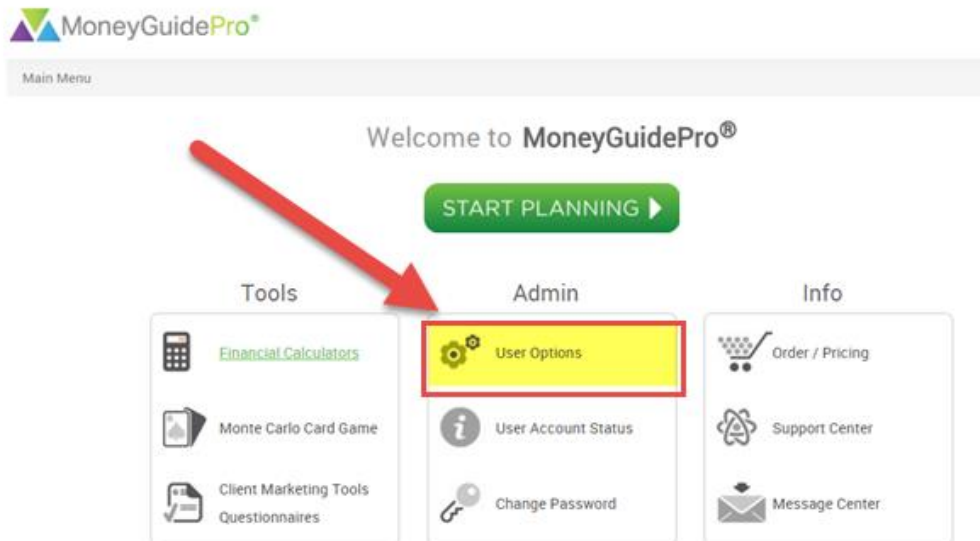
[Delete](#)

Proceed to the next section “Linking MoneyGuidePro and Capitect.”

## Linking MoneyGuidePro and Capitect.

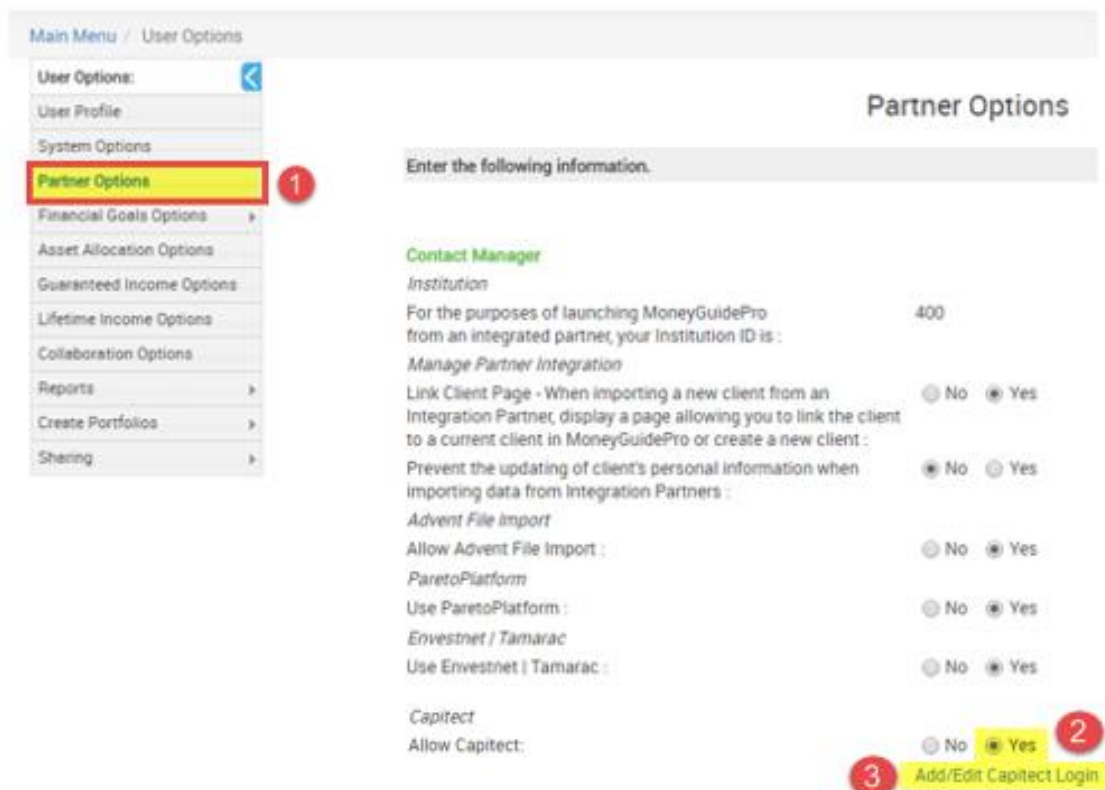
### Step 1:

Login to MoneyGuidePro, and from the Main Menu, select User Options.



### Step 2:

Select Partner Options (1) on the left menu and scroll down to the section for Capitect. Verify the radio button is set to “Yes” (2), and then select the Add/Edit Capitect API Key link (3).





### Step 3:

Enter your Capitect User ID (1) and API Key (2), from [Step 4](#) in the previous section, and select “Done” (3).

#### Add/Edit Capitect Login

1 User Id :

2 Api Key :

You have completed the linking process with Capitect and can import client accounts into MoneyGuidePro. You can go back to the Main Menu and proceed to the next section on how to import accounts from Capitect.

**Note:** The previous two sections only need to be done the first time before you can link clients in MoneyGuidePro with client accounts in Capitect.

Importing client accounts from Capitect into MoneyGuidePro.

Step 1:

Go to the client's My Plans page in MoneyGuidePro and select Manage Integrations.

Main Menu / Clients / My Plans ⌵

## My Plans

Name / Description	Date Created	Last Accessed	Conversation ⓘ	Copy	Delete
<b>Financial Goal Plan</b>					
Financial Goal Plan w/ shortage <i>Star Track - What If Scenario 1</i>	03/12/2014	5 hours ago	Retirement & Estate		
Financial Goal Plan (26)	07/28/2016	07/28/2016	Retirement		
Financial Goal Plan R1 w/o college	02/28/2014	05/19/2016	Retirement & Estate		
<a href="#">Click to see all 5 Plans &gt;</a>					
<b>Asset Allocation Plan</b>					
Asset Allocation Plan	02/28/2014	3 hours ago	—		
<b>Lifetime Income Plan</b>					
Lifetime Income Plan	02/28/2014	3 hours ago	—		

### Add New Plan

- Financial Goal Plan ⓘ
- Asset Allocation Plan ⓘ
- Lifetime Income Plan ⓘ

**Manage Client Portal**  
(access allowed) ⓘ

---

### Other Features

ⓘ  
My Snapshot

ⓘ  
Calculators

ⓘ  
Profile

ⓘ  
Budget

ⓘ  
**Manage Integrations**

ⓘ  
Risk Tolerance

ⓘ  
Aggregation

Step 2:

Select Capitect from the list of available integrations.

## Manage Your Integrations

Riskalyze

Morningstar Office<sup>SM</sup> Web Service Integration

Quovo

Capitect

### Step 3:

Enter in the client's name, full or partial (1) and click Search (2). This will allow you to select the client and associated accounts you want to import into MoneyGuidePro. After selecting the client and accounts, select Done (3).

### Manage Account Integration with Capitect

Search Capitect for the accounts you would like linked/imported for Kathy Smith and John Smith. Select the search criteria below. Then click the search button.

Search By Client Names, full or partial 1 Search 2

Done 3

### Step 4:

Map the account(s) by selecting which accounts to import, the correct account owner, and account type (1). After completing this process, select the Continue button (2).

### Please Map the following Accounts

Please confirm the Account Types and Owners for the information listed below.

#### Investment Assets

Name / Description	Amount	Import?	Account Type	Owner	Joint Owner
	\$227,814	Yes ▾	401(k) ▾	▾	
	\$37,015	Yes ▾	Account ▾	Joint ▾	Survivorship ▾
	\$612,643	Yes ▾	Profit Sharing ▾	▾	
	\$286,602	Yes ▾	401(k) ▾	▾	
	\$543,779	Yes ▾	Account ▾	Joint ▾	Survivorship ▾
	\$846,405	Yes ▾	Account ▾	Joint ▾	Survivorship ▾
	\$151,896	Yes ▾	Variable Annuity ▾	▾	

2 Continue



### Step 5:

Once your accounts have been mapped, you will be returned to the My Plans page for your client. You can see the imported accounts under the Resources tab in the Profile or in a client's plan.

Main Menu / Clients / My Plans

## My Plans

Name / Description	Date Created	Last Accessed	Conversation	Copy	Delete
<b>Financial Goal Plan</b>					
Financial Goal Plan w/ shortage <i>Star Track - What If Scenario 1</i>	03/12/2014	5 hours ago	Retirement & Estate		
Financial Goal Plan (26)	07/28/2016	07/28/2016	Retirement		
Financial Goal Plan R1 w/o college	02/28/2014	05/19/2016	Retirement & Estate		
Click to see all 5 Plans >					
<b>Asset Allocation Plan</b>					
Asset Allocation Plan	02/28/2014	3 hours ago	--		
<b>Lifetime Income Plan</b>					
Lifetime Income Plan	02/28/2014	3 hours ago	--		

### Add New Plan

- Financial Goal Plan
- Asset Allocation Plan
- Lifetime Income Plan

Manage Client Portal  
(access allowed)

---

### Other Features

My Snapshot

Calculators

Profile

Budget

Manage Integrations

Risk Tolerance

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