MoneyGuidePro®

Capitect

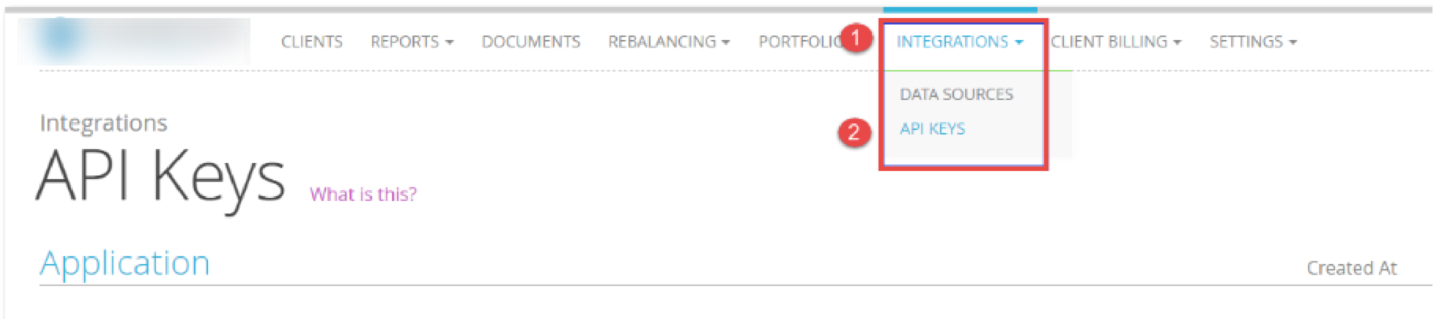
Capitect

Table of Contents

Obtaining API Key from Capitect.

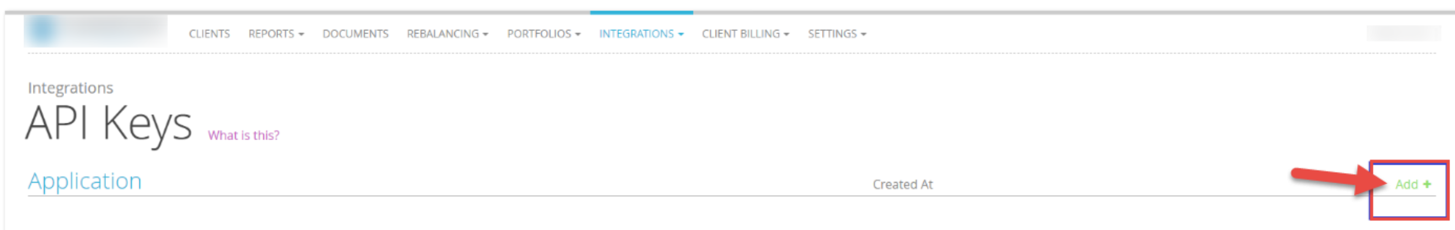
Step 1:

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



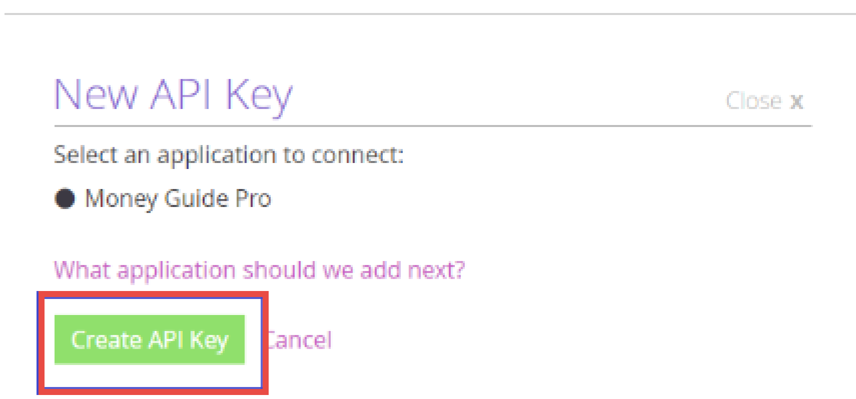
Step 2:

Select Add.



Step 3:

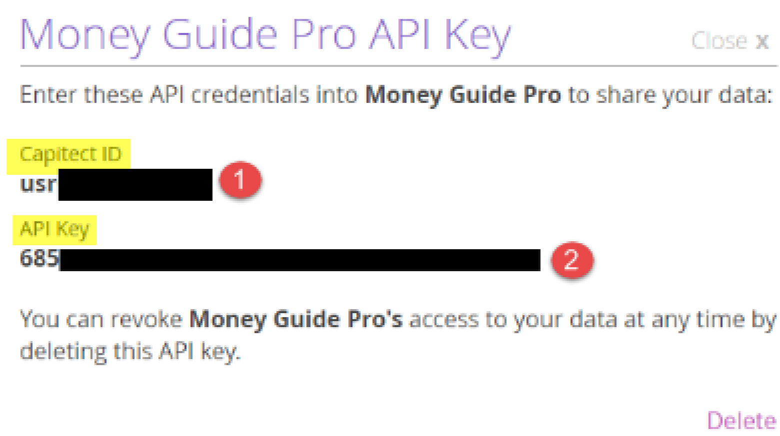
Select Create the API key for MoneyGuidePro.



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.



Proceed to the next section "Linking MoneyGuidePro and Capitect."

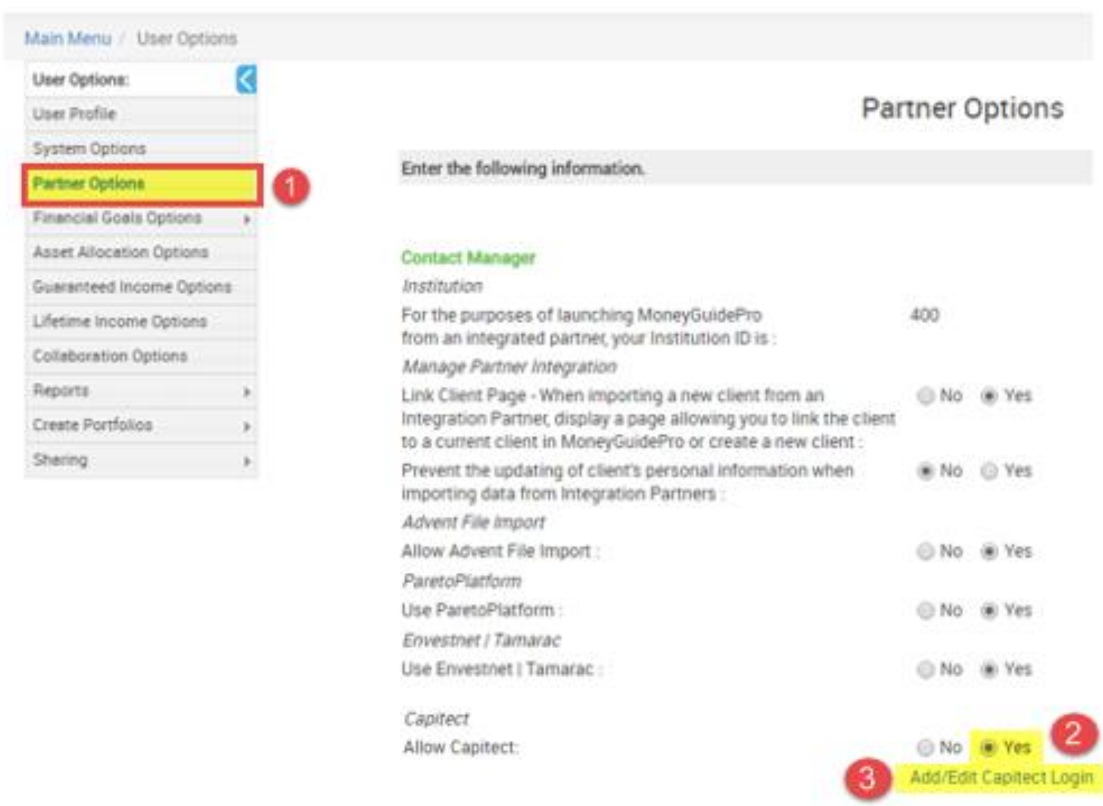
Linking MoneyGuidePro and Capitect.

Step 1:

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

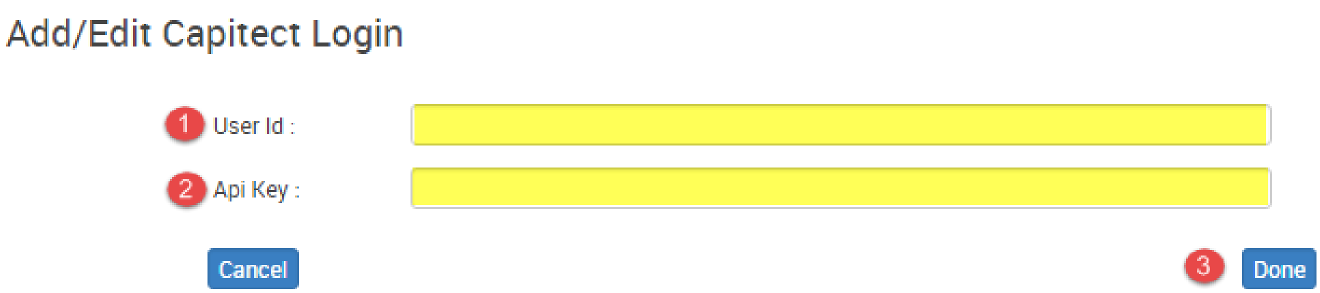
Step 2:

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).



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.

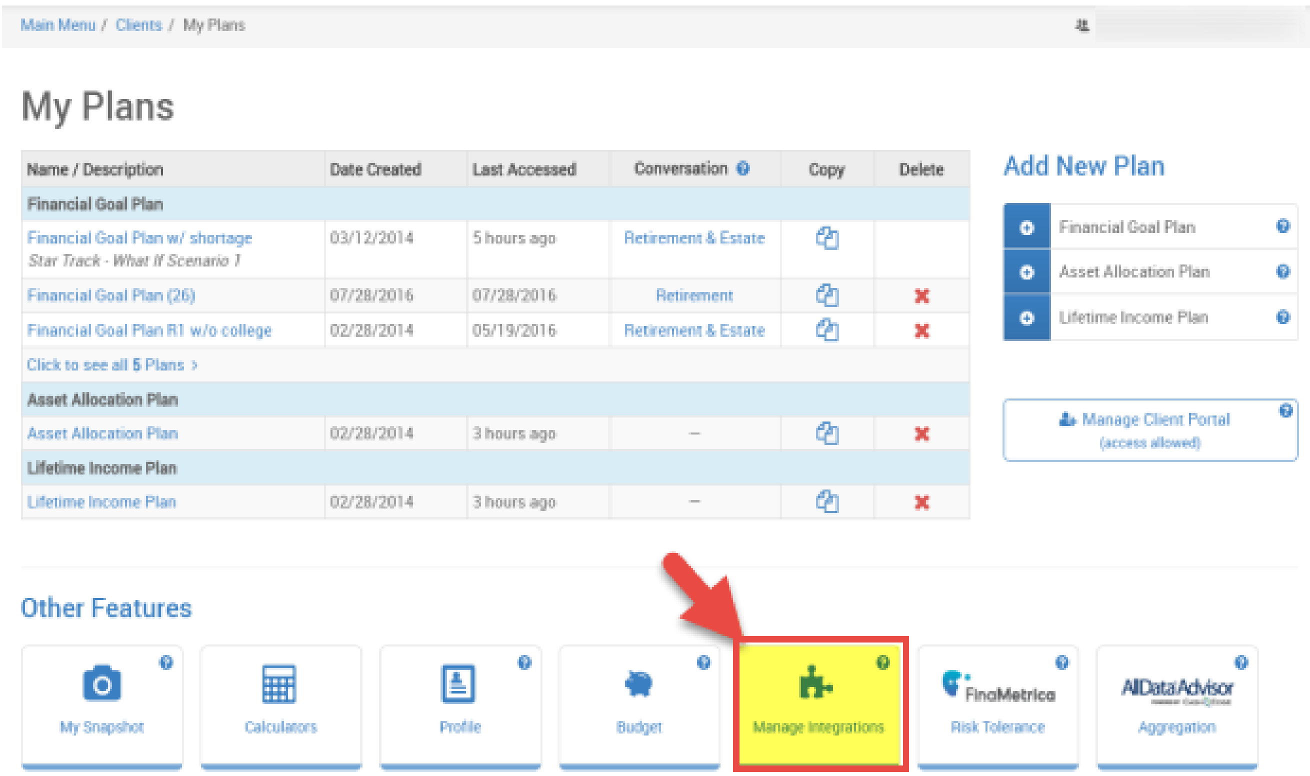
Note: The previous two sections only need to be done the first time before you can link clients in MoneyGuidePro with client accounts in Capitect.

MoneyGuidePro®

Importing client accounts from Capitect into MoneyGuidePro.

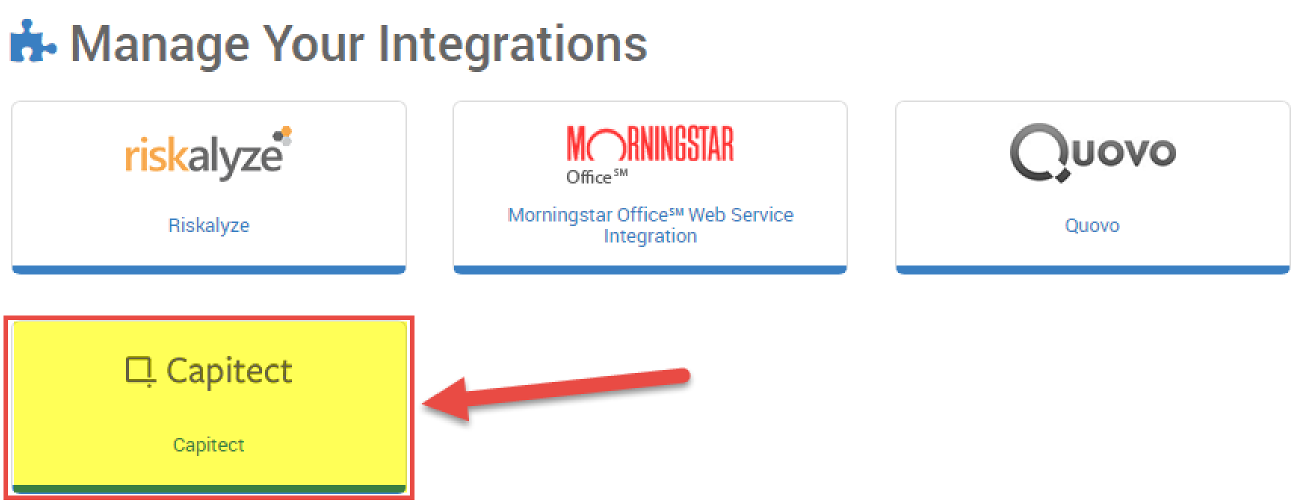
Step 1:

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



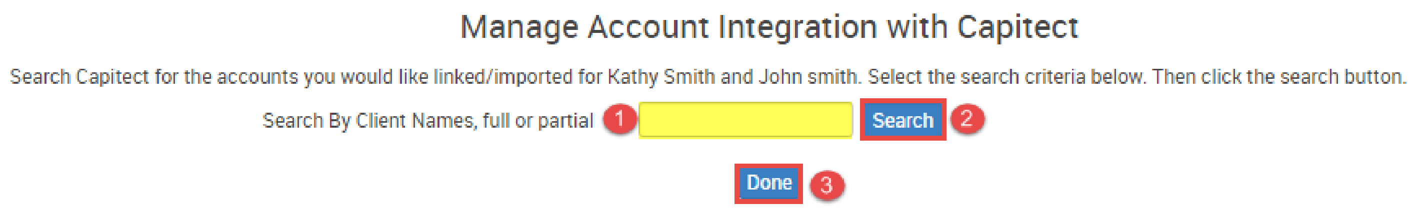
Step 2:

Select Capitect from the list of available integrations.



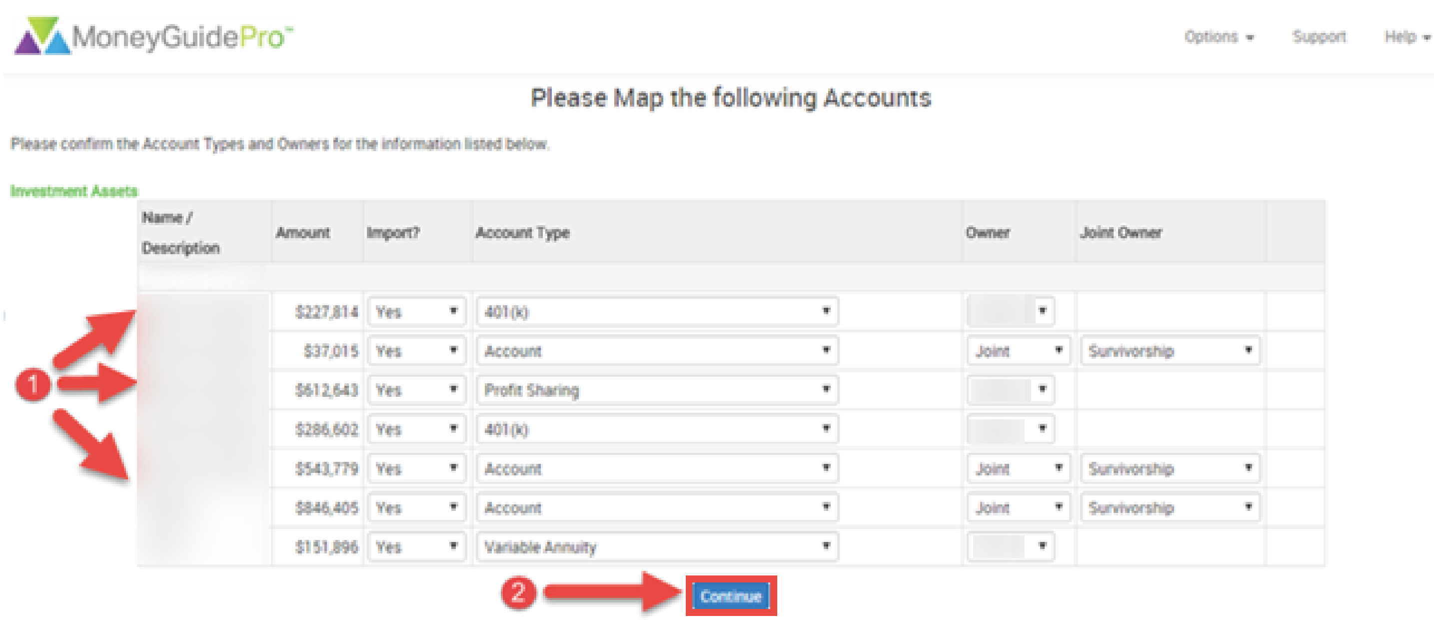
Step 3:

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).



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).



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.