

WealthEngine Integration With NeonCRM

NeonCRM's integration with WealthEngine allows you to quickly look up your constituents in the WealthEngine application. This integration does not store any data from WealthEngine in NeonCRM, it simply makes the lookup process faster and easier.

You must have an existing account with WealthEngine to use this integration.

Configuring the Integration

1. [Obtain a user account from WealthEngine.](#)
2. In NeonCRM, navigate to **Settings cog > Global Settings > Third-Party Integrations > WealthEngine**


Third-Party Integrations

[QuickBooks](#)
[MailChimp](#)
[DonorSearch](#)
[WealthEngine](#)

3. Enter your WealthEngine User name, password, and UID. Click Submit.

System Settings / Home/Dashboard / WealthEngine Integration

WealthEngine Integration



<http://www.wealthengine.com/>

WealthEngine: WealthEngine is the leading provider of wealth intelligence and marketing services to non-profit, higher education, healthcare and commercial organizations. Over 4,000 clients across the U.S. and UK use WealthEngine's products to find prospects with the propensity to spend and the affinity to engage. We go beyond wealth, allowing our clients to influence and retain their customers in unique and personal ways.

Integration Setup

In order to use this integration, you will need an account with WealthEngine. Please [contact WealthEngine](#) to sign up for an account. Once you have an account, enter your user name and password to establish the connection.

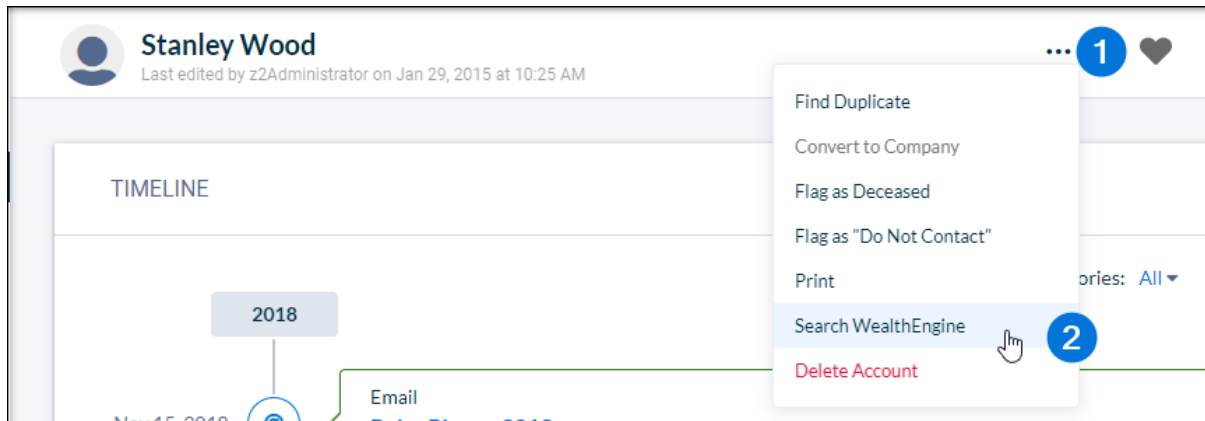
WealthEngine User Name:

WealthEngine Password:

WealthEngine UID:

Using WealthEngine from NeonCRM

Once you have entered your WealthEngine login information, you will be able to screen individual Neon accounts. On an account, click **Actions** (three dots) in the **Profile Toolbar** and then **Search WealthEngine**.



This will launch WealthEngine in a separate browser window and retrieve information about this individual.

Have Questions?

Contact WealthEngine at customerservice@wealthengine.com or 855-200-0665 or via online chat.