Raymond James Overnight Batch Integration Available for Advisor Workstation

Want to learn more?

[Get a free demo today.](#)

The Overnight Batch Integration allows client data to load automatically into Advisor Workstation. Automating the client and portfolio import process will help you work more efficiently and effectively with your entire base of clients.

Save time with Morningstar Advisor Workstation so you can spend more moments engaging with clients.

Instructions

To activate integration with the Raymond James Platform, please follow these steps:

▸ Please contact the Raymond James TSC desk at 877-847-5435 to set this up. Their operating hours are 6:30AM EST to 9:00PM EST, Monday through Friday. The turnaround time is 24-48 hours.

▸ Once the TSC desk adds you, RJ will begin sending Morningstar data and it will be automatically load. Any issues with importing should be sent to IT-DownloadAdministration@RJLAN.RJF.com

MORNINGSTAR®