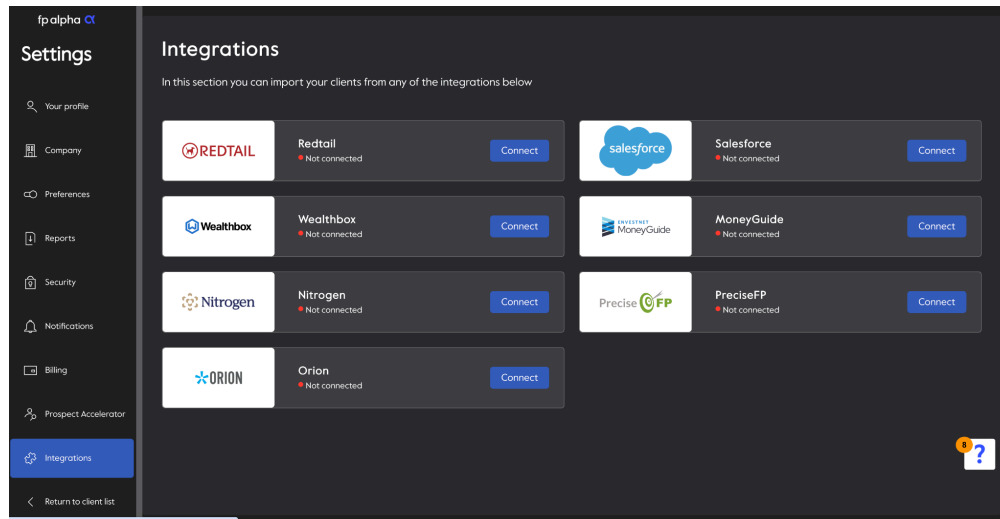


Nitrogen

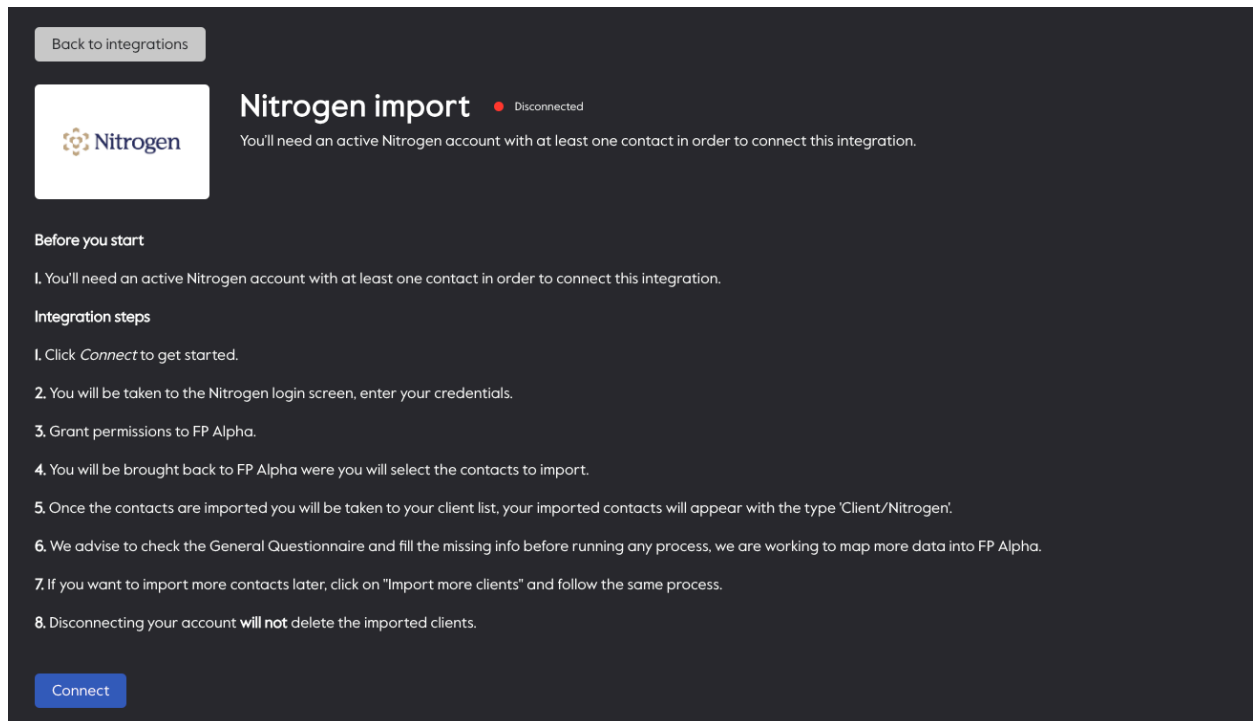
How to Integrate

Setting up the integration


Once you're logged in to your FP Alpha account, navigate to Account > Settings > Integrations. You'll see a screen with all FP Alpha integrations.



Select the Nitrogen option and it will take you to a new screen with the integration instructions. Click on "Connect" to get started.



You will be taken to the Nitrogen login screen to enter your credentials.



Connect FP Alpha, Inc. (TEST) to Nitrogen

To continue, please enter your email and password.

EMAIL

PASSWORD [SHOW PASSWORD](#)

[Forgot Password?](#)

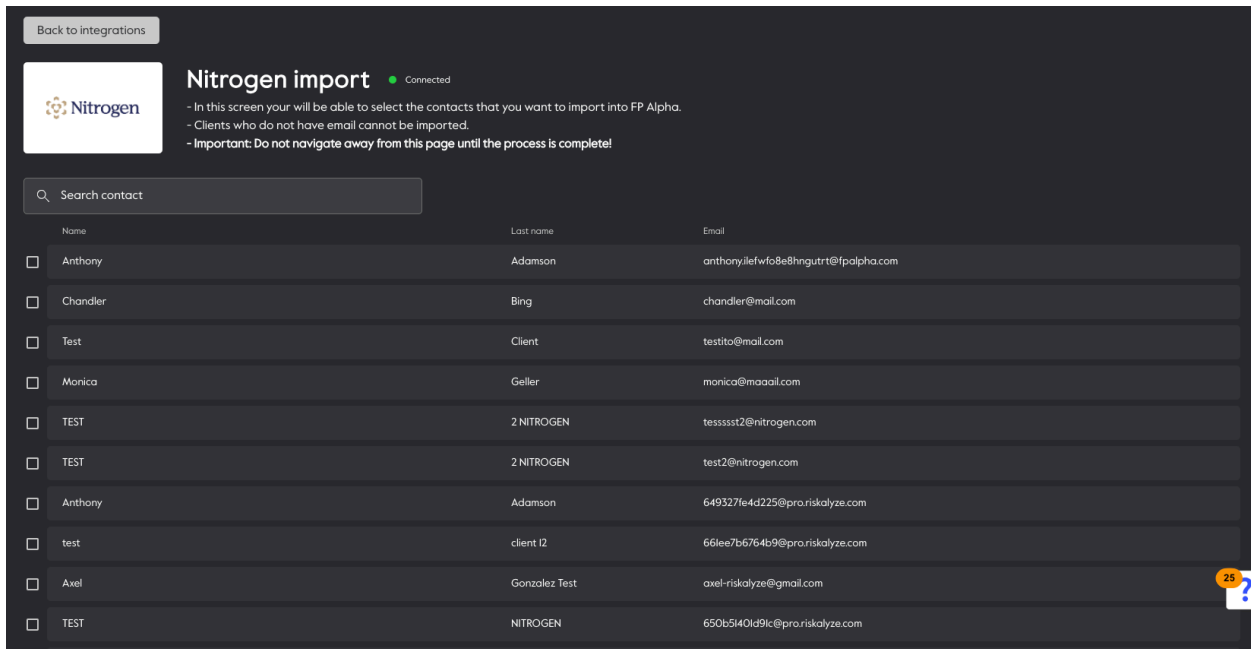
Log In

Importing contacts

If the authentication is successful, you will be redirected back to FP Alpha to select your clients.

In this section, you'll find all your PreciseFP contacts. To choose them, simply select the checkbox next to their names.

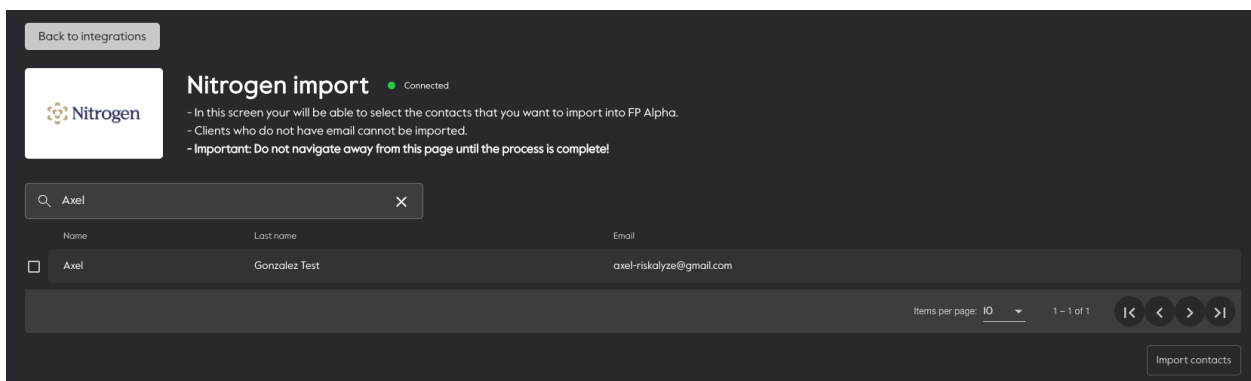
Note: Clients without email addresses will appear with the checkbox disabled



The screenshot shows the "Nitrogen import" interface. At the top left, there is a "Back to integrations" button. The main header includes the Nitrogen logo, the title "Nitrogen import" with a "Connected" status, and three instructions: "In this screen you will be able to select the contacts that you want to import into FP Alpha.", "Clients who do not have email cannot be imported.", and "Important: Do not navigate away from this page until the process is complete!". Below the header is a search bar labeled "Search contact". The main content is a table with columns for "Name", "Last name", and "Email". Each row has a checkbox on the left. The table contains 10 rows of contact data.

	Name	Last name	Email
<input type="checkbox"/>	Anthony	Adamson	anthony.ilefwo8e8hngutrt@fpalpha.com
<input type="checkbox"/>	Chandler	Bing	chandler@mail.com
<input type="checkbox"/>	Test	Client	testtto@mail.com
<input type="checkbox"/>	Monica	Geller	monica@maail.com
<input type="checkbox"/>	TEST	2 NITROGEN	tesssst2@nitrogen.com
<input type="checkbox"/>	TEST	2 NITROGEN	test2@nitrogen.com
<input type="checkbox"/>	Anthony	Adamson	649327fe4d225@pro.riskalyze.com
<input type="checkbox"/>	test	client I2	66lee7b6764b9@pro.riskalyze.com
<input type="checkbox"/>	Axel	Gonzalez Test	axel-riskalyze@gmail.com
<input type="checkbox"/>	TEST	NITROGEN	650b51401d91c@pro.riskalyze.com

You can filter the results by typing the contact name or email in the *Search Contact* bar or by *selecting a client type* and clicking on "Enter".



The screenshot shows the "Nitrogen import" interface after a search for "Axel". The search bar now contains "Axel" and has a clear button. The table below shows only one result: "Axel" with last name "Gonzalez Test" and email "axel-riskalyze@gmail.com". At the bottom right, there is a pagination control showing "Items per page: 10" and "1 - 1 of 1", along with navigation arrows. An "Import contacts" button is located at the bottom right of the interface.

	Name	Last name	Email
<input type="checkbox"/>	Axel	Gonzalez Test	axel-riskalyze@gmail.com

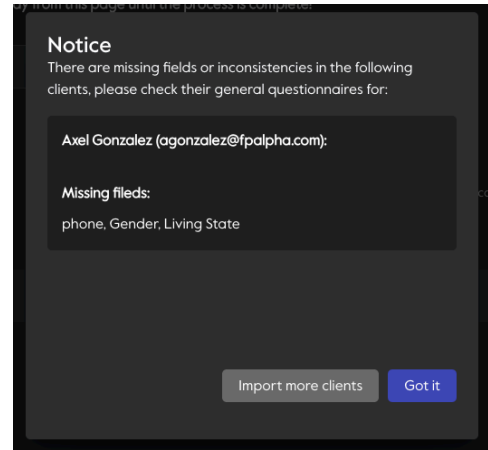
After you've finished selecting your contacts, click on 'Import Contacts'.

Once the contacts are imported, if no information is missing, you'll be redirected to your Client List. However, if there are missing details, a popup will appear with a message based on the warning issued by the system. Click on 'Got it' to proceed to the dashboard or 'Import More Clients' to continue importing.

Missing required fields

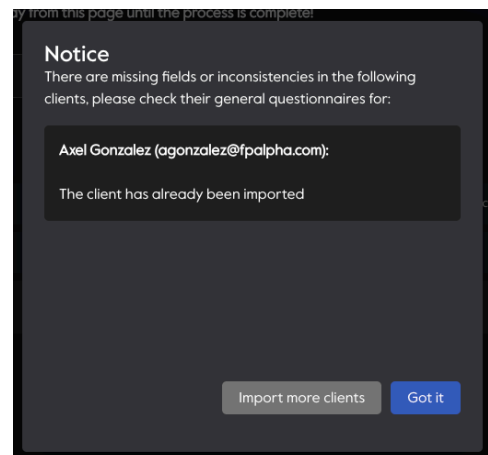
This pop-up will show when there's important information missing from the client.

Only if you see this pop you'll be redirected to the general questionnaire the first time you select the imported client



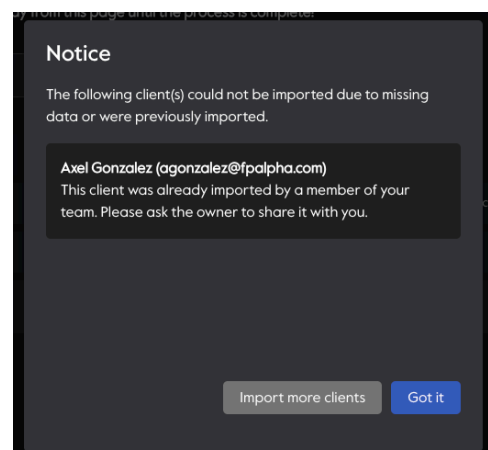
Client already imported

This popup will show when the client was already imported by you and some of their information was updated due to the re-import



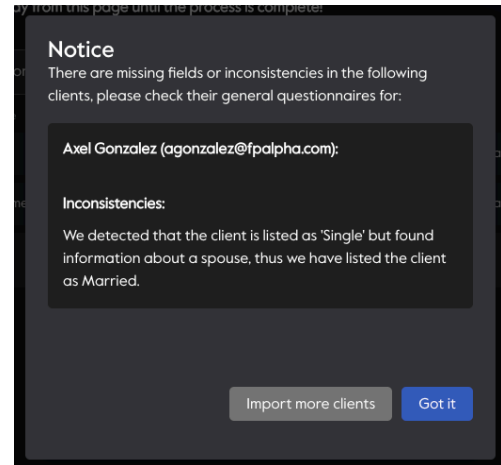
The client was imported by another member of the company

FP Alpha doesn't allow having repeated clients, therefore you'll see this popup if you try to import a client that was already imported by someone in your company.



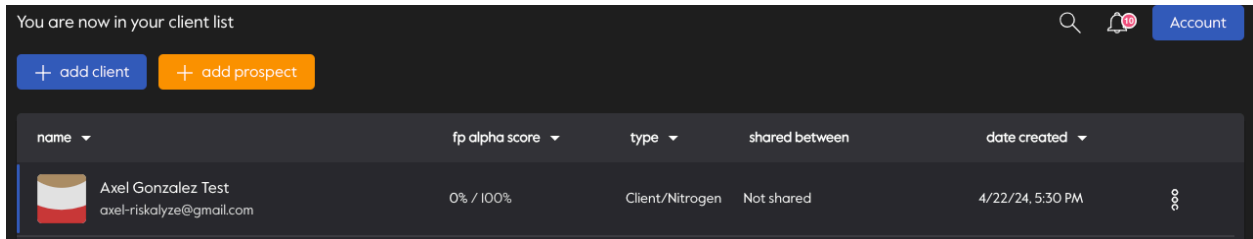
Inconsistencies

If we detected that a client is Single but we found a Co-Client, we need to change the status to 'Married' and you will see an inconsistency. And vice versa



After importing contacts

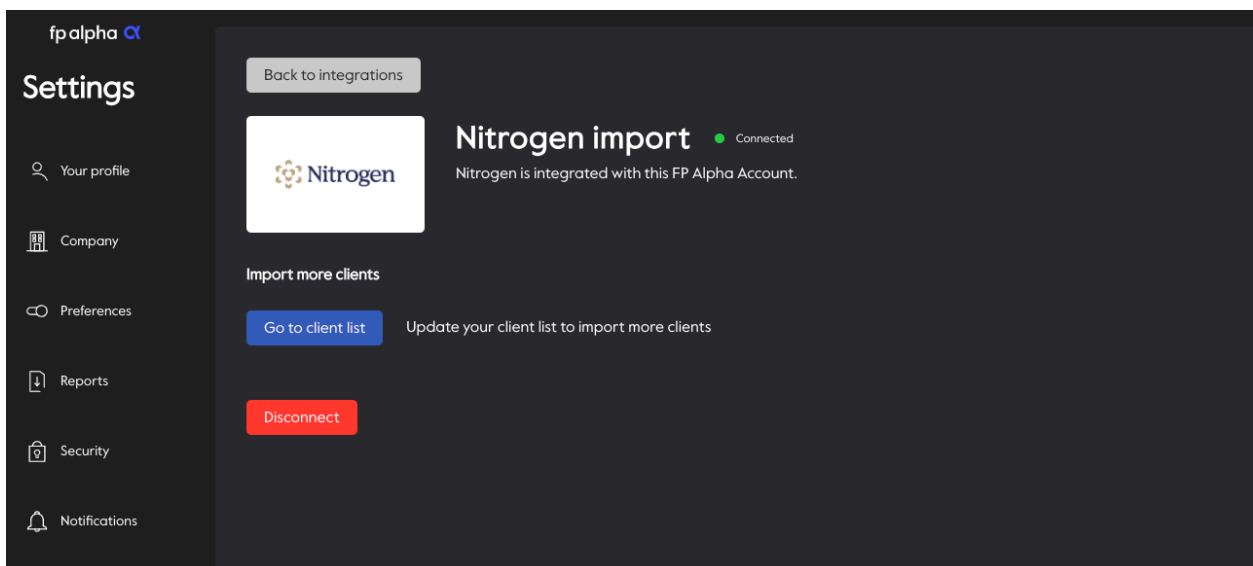
Once the contacts are imported you will be taken to your client list, and your imported contacts will appear with the type 'Client/Nitrogen'.



We recommend checking the General Questionnaire and filling in any missing information before proceeding with any tasks. We are continually working to integrate more data into FP Alpha.

If you wish to import more contacts later, simply click on 'Import More Clients' and follow the same process.

To disconnect your account, click on 'Disconnect'



Note: Disconnecting your account will not delete the imported clients.

Data Mapping

Personal Information			
FPAlpha	Nitrogen	Required	Comments
Client			
Marital Status		Yes	By default, it is Single.
First Name	Clients/Name	Yes	
Last Name	Clients/Name	Yes	
Email	Clients/Email	Yes	
Gender		Yes	By default, it is Male.
Birthdate	Client/Retirement plan/Birth Year	Yes	
Estate of residence		Yes	
Is client retired			No, when this field is empty.
Occupation			
Net Worth Type			By default, it is a number.
Net Worth			
Net Worth Range			
Non Resident Alien			

Assets Information			
FPAlpha	Nitrogen	Required	Comments
Non Retirement			
Account Type		Yes	All types Are 'Annuity' or 'Insurance Product'.
Nickname	Clients/Portfolio/Name	Yes	
Owner/Title		Yes	If no owner is found, by default it is the Client.
Account Value	Clients/Portfolio/Value	Yes	
Beneficiaries			
Contingent Beneficiaries			
Life Insurance			
Type		Yes	All types are 'Funds,' 'Stocks,' and 'Other'.
Nickname	Clients/Portfolio/Name	Yes	
Policy Owner		Yes	If no owner is found, by default it is the Client.
Death Benefit Amount	Clients/Portfolio/Value	Yes	
Whose Life is Insured?			
Cash Value			
Beneficiaries			
Contingent Beneficiaries			