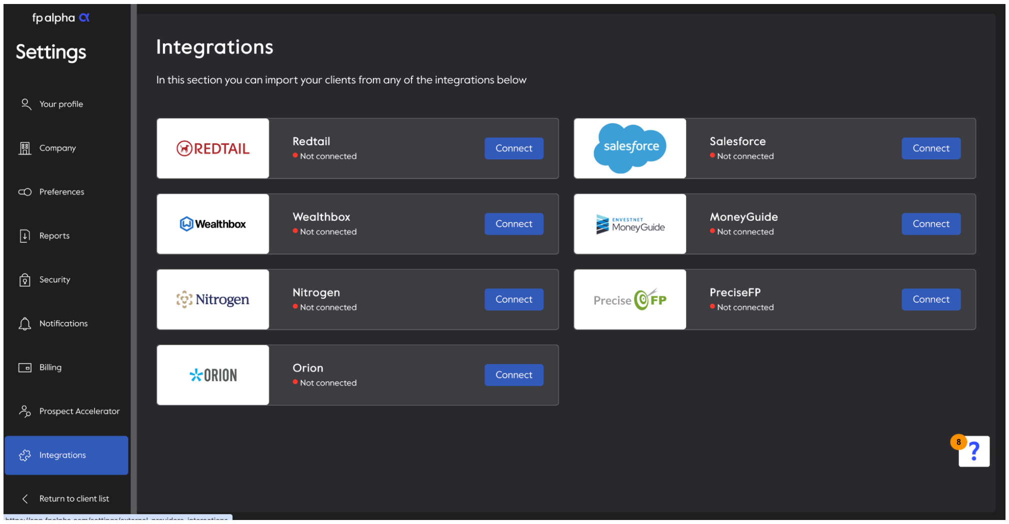
Orion

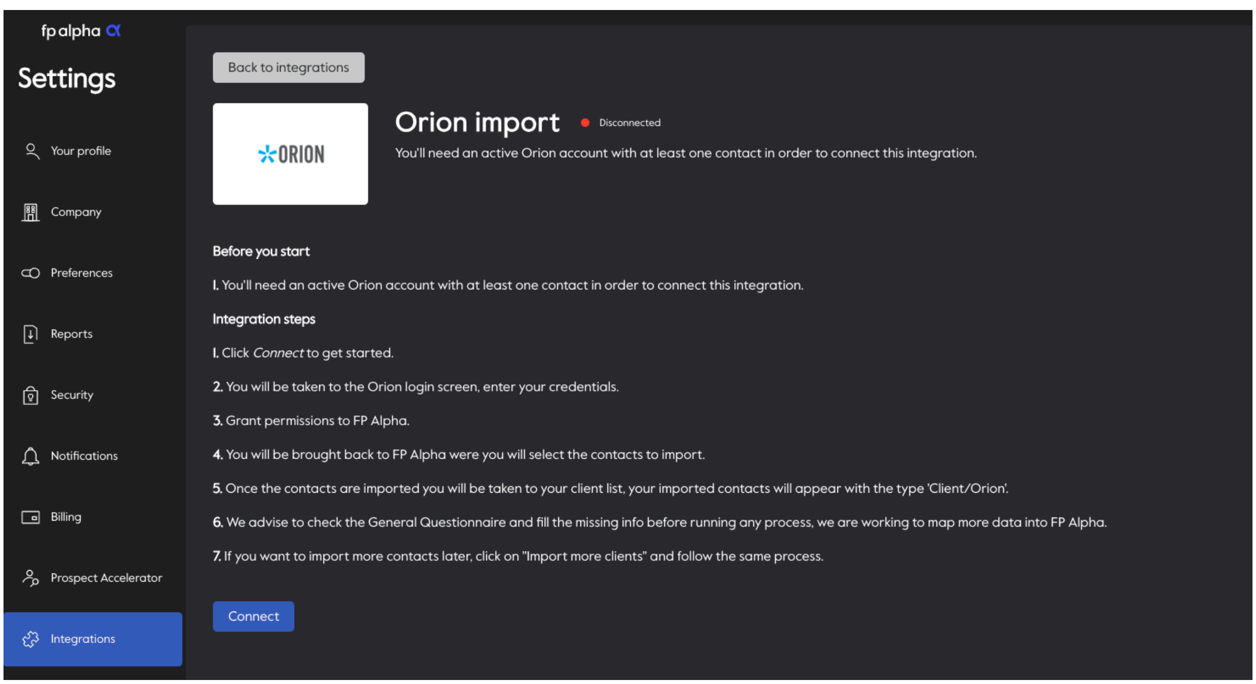
How to Integrate

Setting up the integration

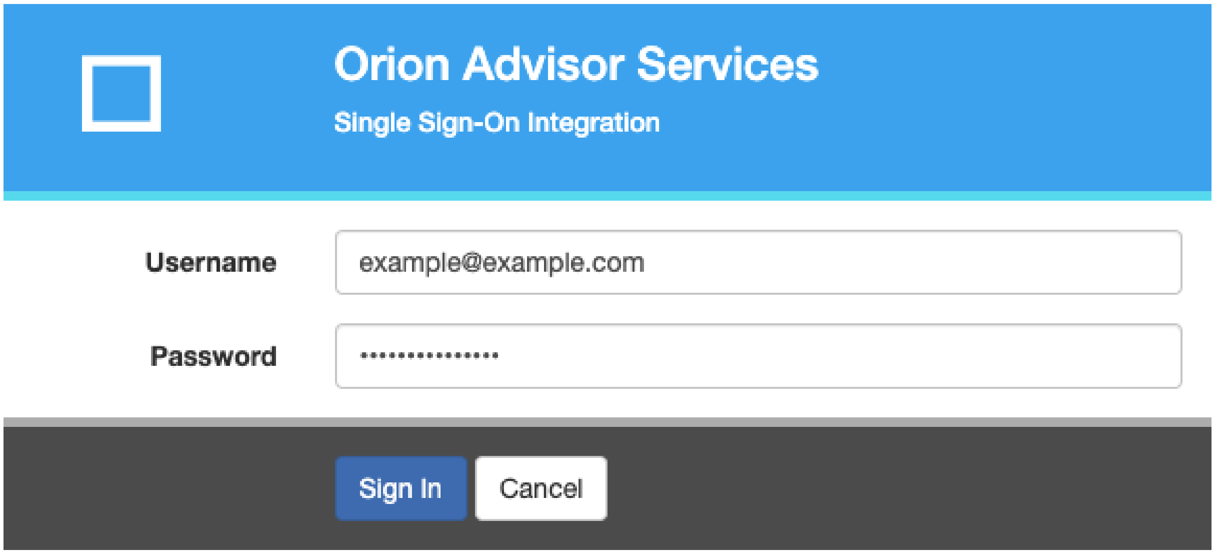
Once you're logged in to your FP Alpha account, navigate to Account > Settings > Integrations. You'll see a screen with all FP Alpha integrations.



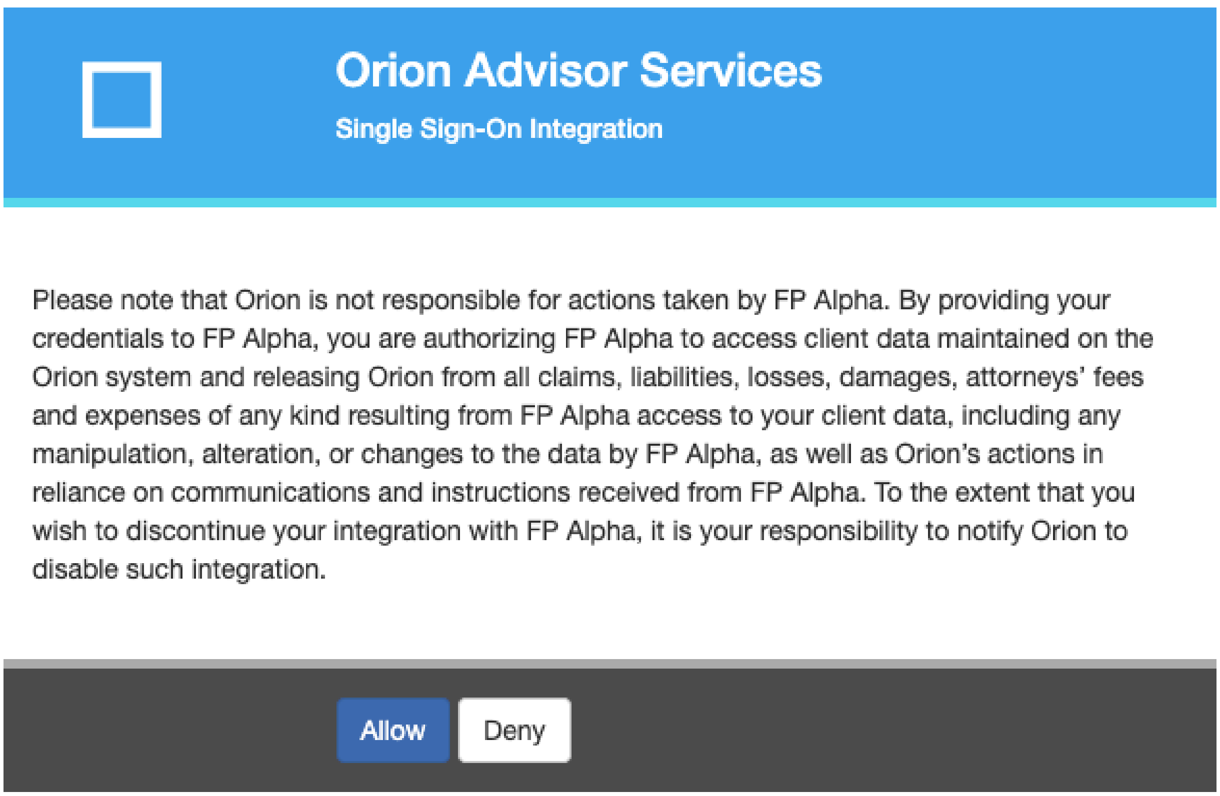
Select the Orion option and it will take you to a new screen with the integration instructions. Click on "*Connect*" to get started.



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



Grant permissions to FP Alpha by clicking Allow.

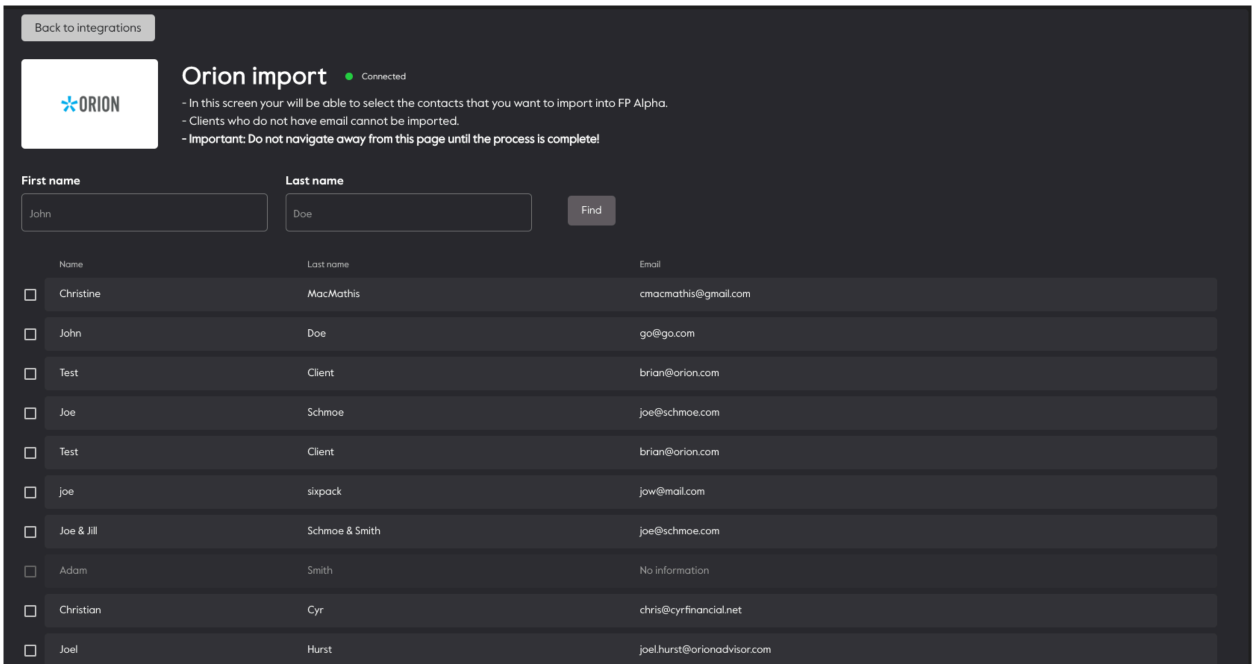


Importing contacts

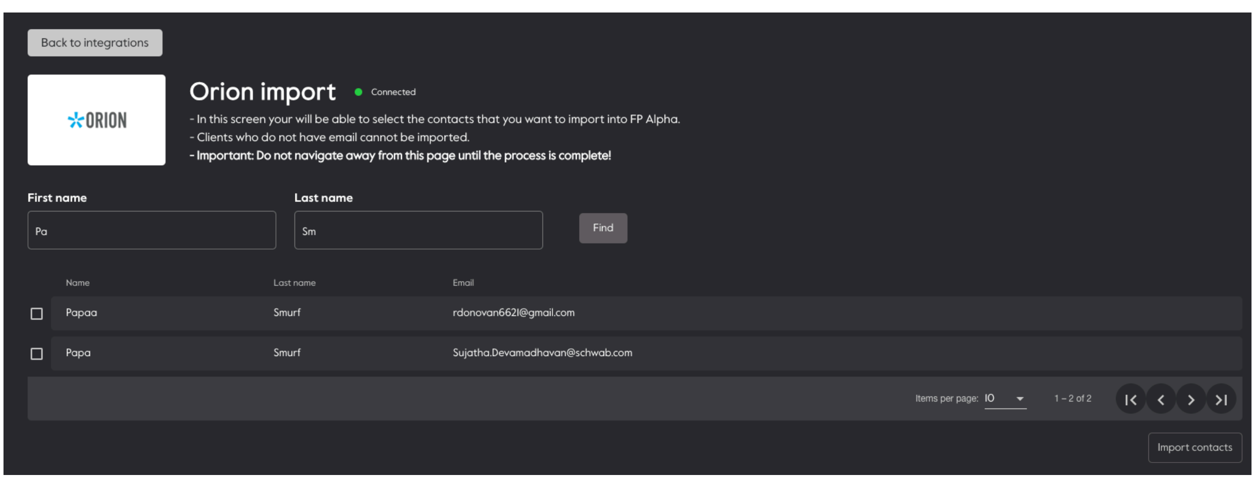
If the authentication is successful, you will be redirected back to FP Alpha to select your clients.

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



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"*.



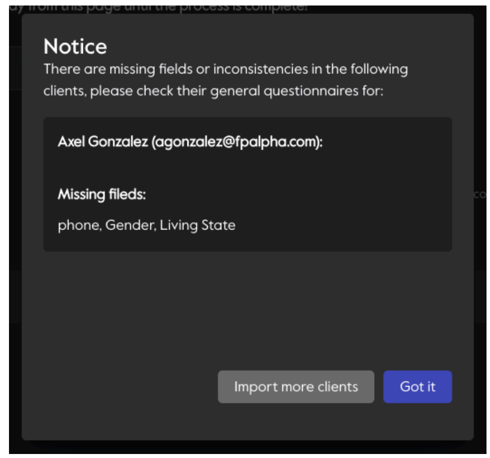
After you've finished selecting your contacts, click on 'Import Contacts'.

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

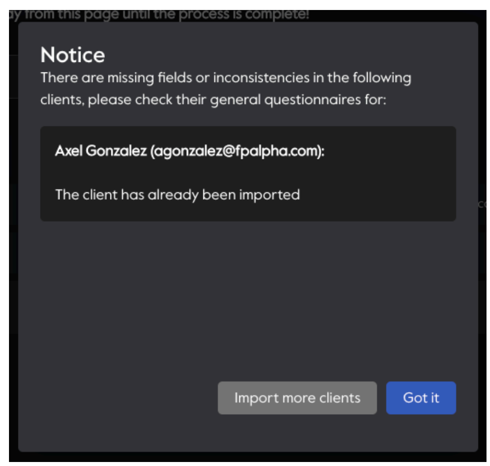
This pop-up will show when there's important information missing from the client.

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



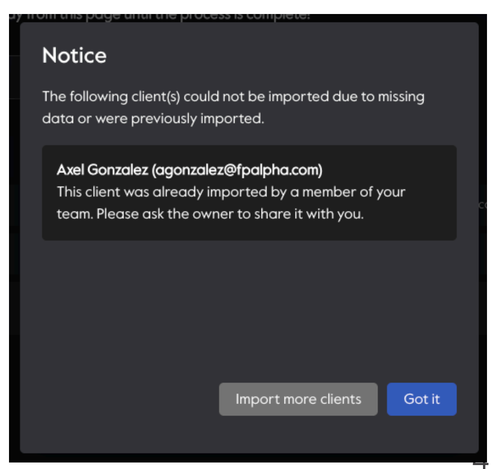
Client already imported

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



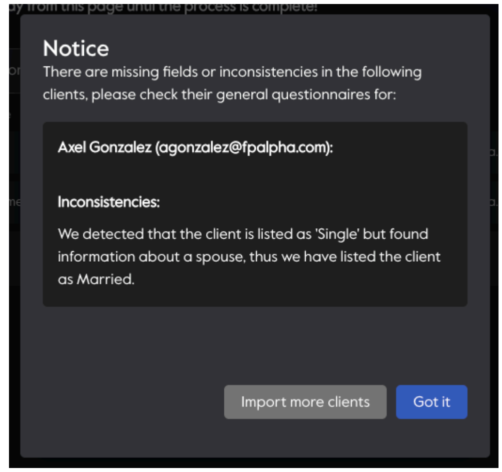
The client was imported by another member of the company

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.



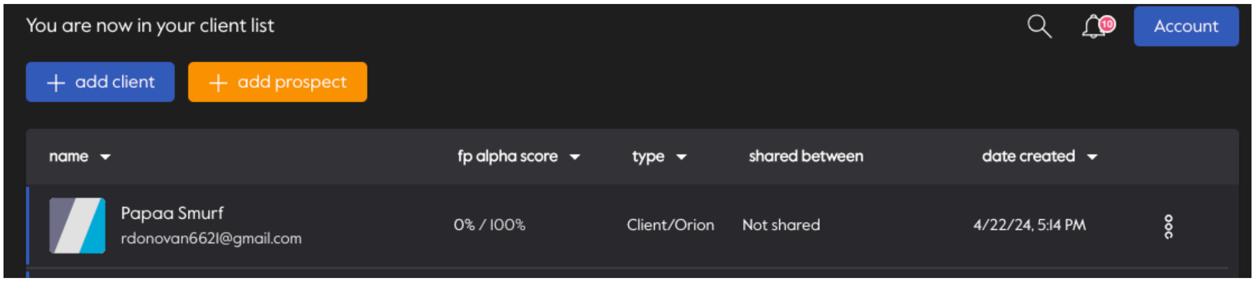
Inconsistencies

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

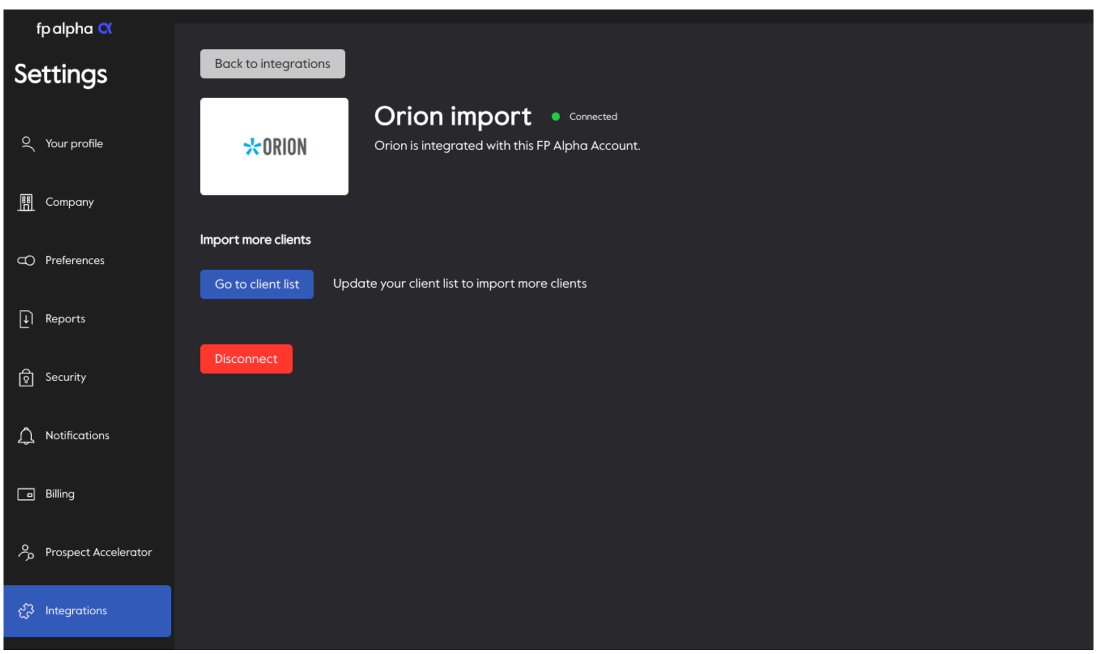
Once the contacts are imported you will be taken to your client list, and your imported contacts will appear with the type ‘Client/Orion’.



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	**Orion**	**Required**	**Comments**
Client			
Marital Status	Contacts/Personal Information/Marital Status		
First Name	Households/General/Firtst Name	Yes	
Last Name	Households/General/Last Name	Yes	
Email	Households/Contact/Email	Yes	
Gender	Households/General/Gender	Yes	
Birthdate	Households/General/DOB	Yes	
Estate of residence	Households/Address/State	Yes	
Is client retired	Households/Contact/Job Title		No, when this field is empty.
Occupation	Households/Contact/Job Title		
Net Worth Type			By default, it is a number.
Net Worth			
Net Worth Range			
Non Resident Alien			
Co-Client (In Case Marital Status Is 'Married')			
First Name	Households/Houseolg Members/Name	Yes	
Last Name	Households/Houseolg Members/Name		
Email			
Gender	Households/Houseolg Members/Gender	Yes	
Birthdate	Households/Houseolg Members/DOB	Yes	
Estate of residence		Yes	Same as the client.
Is client retired			
Occupation			
Net Worth Type			By default, it is a number.

Net Worth			
Net Worth Range			
Non Resident Alien			

Family Information			
FPAlpha	**Orion**	**Required**	**Comments**
Children			
Do the clients have children?			If children are found, it is 'Yes'; if not, 'No'.
Name	Households/Houseolg Members/Name	Yes	
Date of birth	Households/Houseolg Members/DOB		
Parent(s)			Automatically add the parents (Client and Co-Client).
Full time college student			
Disability?			
Grandchildren			
Do the clients have grandchildren?			If grandchildren are found, it is 'Yes'; if not, 'No'.
Name	Households/Houseolg Members/Name	Yes	
Date of birth	Households/Houseolg Members/DOB		
Other beneficiaries			
Do the clients want to add more beneficiaries?			If other members are found, it is 'Yes'; if not, 'No'.
Name	Households/Houseolg Members/Name	Yes	
Relationship	Households/Houseolg Members/Type		

Assets Information			
FPAlpha	**Orion**	**Required**	**Comments**
Real Estate			
Nickname	Registrations/General/Registration Name		
Owner/Title			If no owner is found, by default it is the Client.
Market Value	Registrations/Fee Paying Accounts/Account Value		
Real Estate Type	Registrations/General/Account Type		Orion Types // FP Alpha Types Community Property => Other Estate => Other EST => Primary Residence
Location			
Cost Basis			
Business			
Name	Registrations/General/Registration Name	Yes	
Owner/Title		Yes	If no owner is found, by default it is the Client.
Fair Market Value	Registrations/Fee Paying Accounts/Account Value	Yes	

Structure	Registrations/General/Account Type		Orion Types // FP Alpha Types
			Business => NONE
			Corporation => C Corp
			Partnership => Partnership
			CORP => C Corp

Location			
Ownership Percentage			
Retirement			

Account Type	Registrations/General/Account Type	Yes	Orion Types // FP Alpha Types
			401(K) => 401(k)
			403(B) => 403 (b)
			Beneficiary IRA => Other
			Contributory IRA => Other
			Contributory Roth => Other
			Conversion Roth => Other
			Defined Benefit Plan => Other
			Defined Contribution Plan => Other
			Defined Pension => Other
			Individual Retirement Account => Traditional IRA
			IRA => Traditional IRA
			IRA Rollover => Other
			Keogh => Other
			Money Purchase Pension Plan => Other
			Optional Retirement Program => Other
			Pension => Other
			Personal Choice Retirement Account => Other
			Profit Sharing Plan => Other
			Retirement Plan => Other
			Roth => Roth IRA
			SAR Sep Plan => Other
			Simple => Other
			Simplified Employee Pension Plan => Other
			TRADITIONAL_IRA => Traditional IRA
			ROTH => Roth IRA
			IRA => Traditional IRA

Nickname	Registrations/General/Registration Name	Yes	
Owner/Title		Yes	If no owner is found, by default it is the Client.
Account Value	Registrations/Fee Paying Accounts/Account Value	Yes	
Beneficiaries	Registrations/Beneficiaries/Name		Select all beneficiaries and put them in Fp Alpha.

Contingent Beneficiaries			
Non Retirement			

Account Type	Registrations/General/Account Type	Yes	Orion Types // FP Alpha Types
			Custodial => Other
			Individual Managed Account => Brokerage/Taxable

Nickname	Registrations/General/Registration Name	Yes	
Owner/Title		Yes	If no owner is found, by default it is the Client.
Account Value	Registrations/Fee Paying Accounts/Account Value	Yes	
Beneficiaries	Registrations/Beneficiaries/Name		Select all beneficiaries and put them in Fp Alpha.
Contingent Beneficiaries			
Life Insurance			
Type	Registrations/General/Account Type	Yes	No mapping here.
Nickname	Registrations/General/Registration Name	Yes	
Policy Owner		Yes	If no owner is found, by default it is the Client.
Death Benefit Amount	Registrations/Fee Paying Accounts/Account Value	Yes	
Whose Life is Insured?			
Cash Value			
Beneficiaries	Registrations/Beneficiaries/Name		
Contingent Beneficiaries			
College Saving			

Type	Registrations/General/Account Type	Yes	Orion Types // FP Alpha Types Uniform Gift to Minors Account => UTMA/UGMA Uniform Transfers to Minors Account => UTMA/UGMA
Plan Nickname	Registrations/General/Registration Name	Yes	
Custodian		Yes	If no owner is found, by default it is the Client.
Account Value	Registrations/Fee Paying Accounts/Account Value	Yes	
Beneficiaries	Registrations/Beneficiaries/Name		
Contingent Beneficiaries			
Loan/Liability			
Type	Registrations/General/Account Type		No mapping here.
Nickname	Registrations/General/Registration Name	Yes	
Loan Owner		Yes	If no owner is found, by default it is the Client.
Loan Amount	Registrations/Fee Paying Accounts/Account Value	Yes	
Interest Rate			