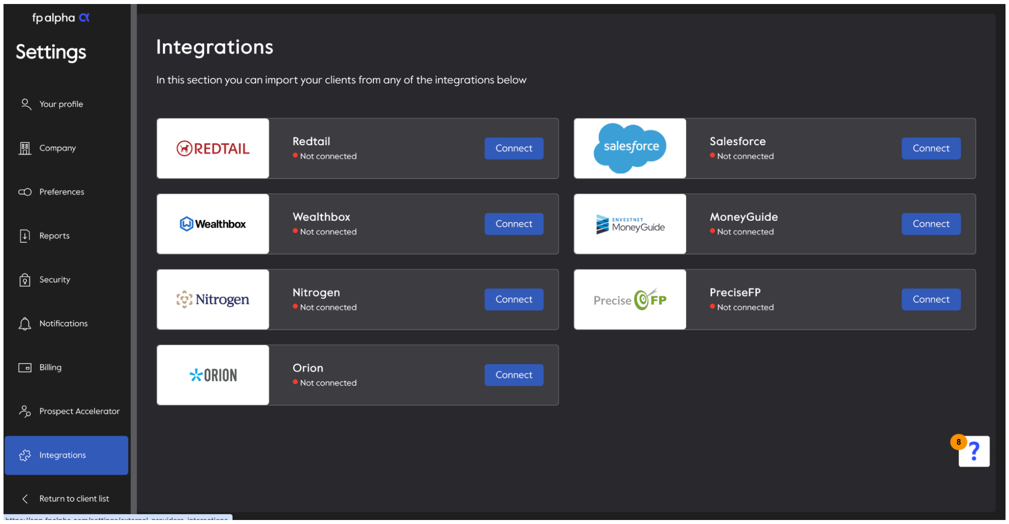
PreciseFP

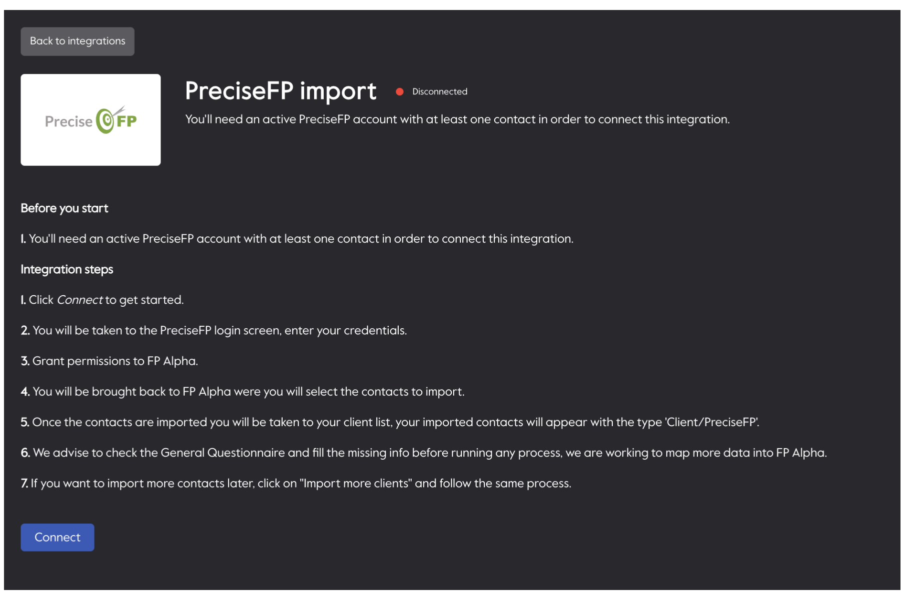
How to Integrate

Setting up the integration

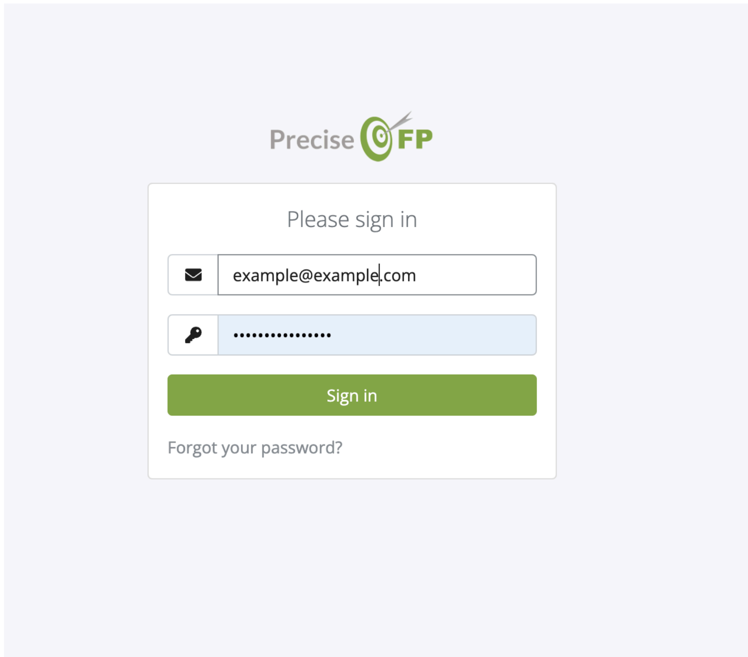
Once you're logged in to your FP Alpha account, navigate to Account > Settings > Integrations. You'll see a screen with all FP Alpha integrations.



Select the PreciseFP 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 PreciseFP login screen to enter your credentials.

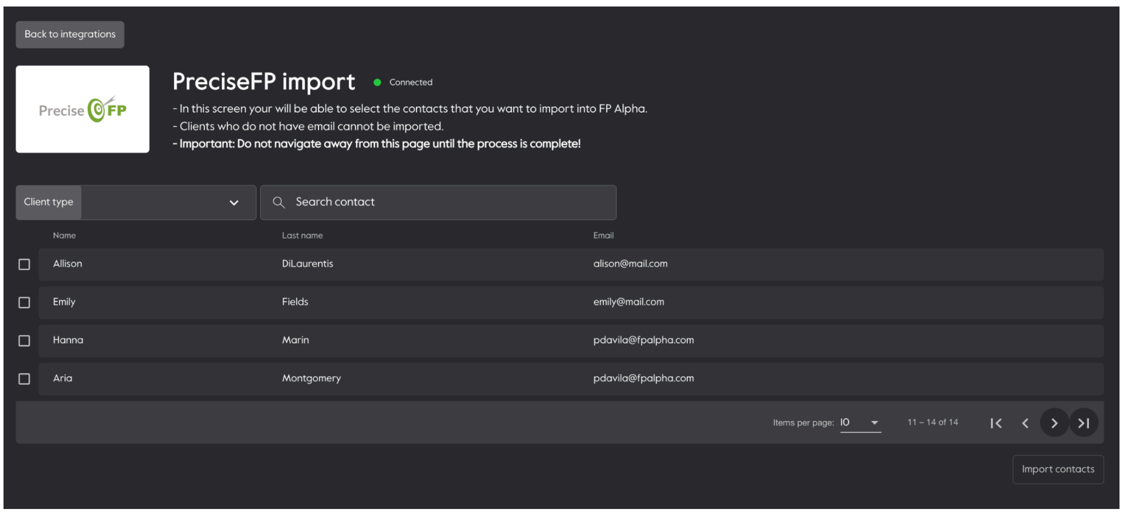


Importing contacts

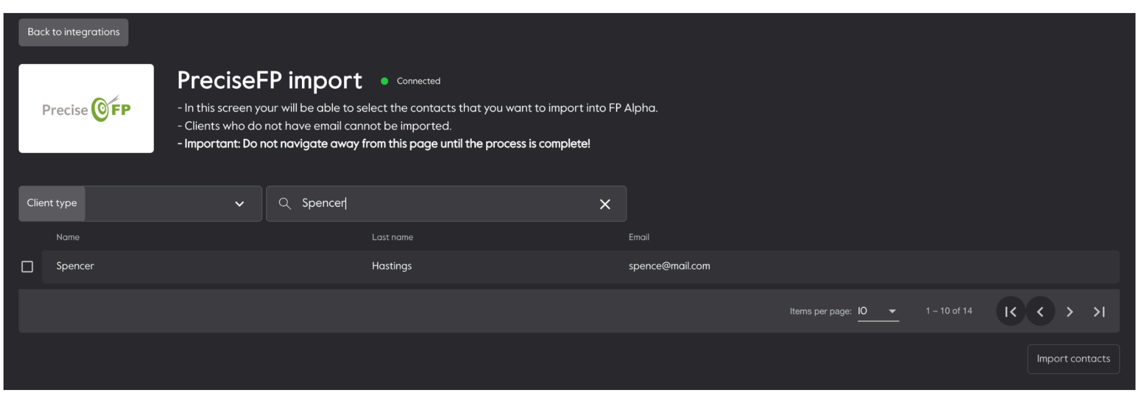
If the authentication is successful, you will be redirected back to FP Alpha to select your clients.

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"*.



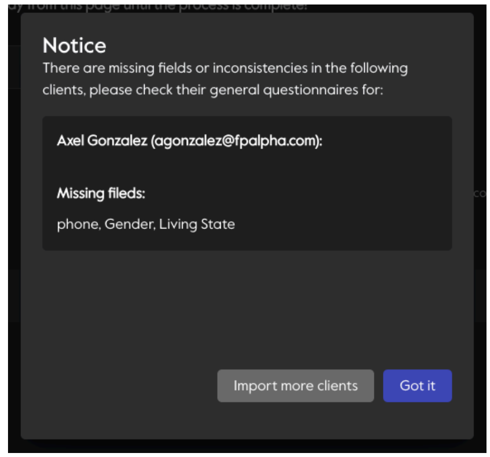
After you've finished selecting your contacts, click on 'Import Contacts'.

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

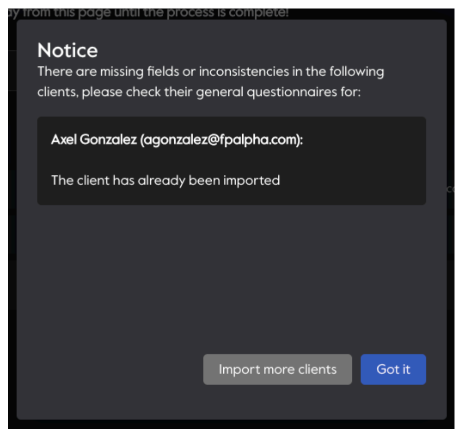
This pop-up will show when there's important information missing from the client.

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

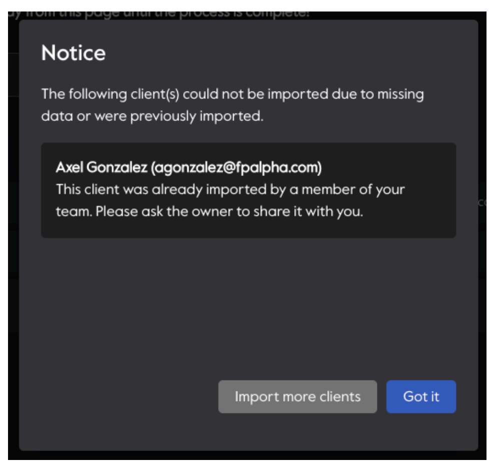
This popup will show when the client was already imported by you and some of their information was updated due to the re-import



The client was imported by another member of the company

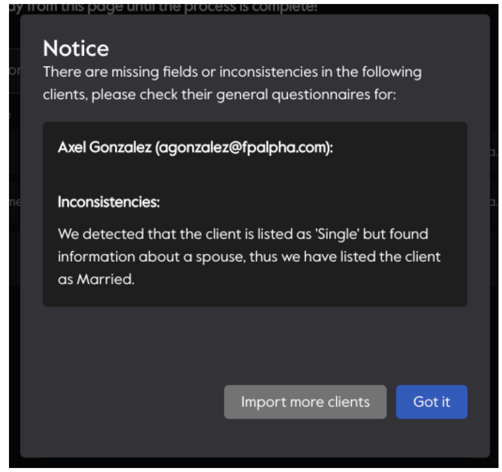
FP Alpha doesn't allow having repeated clients, therefore you'll see this popup if you try to import a client that was already imported by someone in your company.

It won't show the inconsistencies or warnings



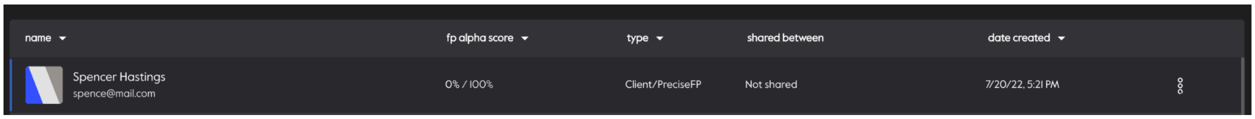
Inconsistencies

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

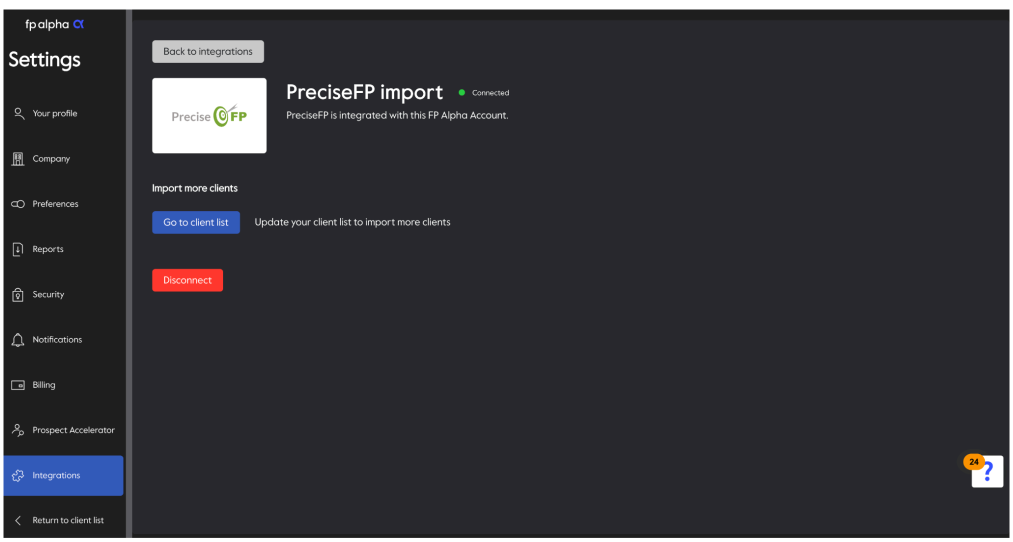
Once the contacts are imported you will be taken to your client list, and your imported contacts will appear with the type ‘Client/PreciseFP’.



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	**PreciseFP**	**Required**	**Comments**
Client			
Marital Status	Client Details/Personal Details/Marital Status	Yes	
First Name	Client Details/Personal Details/First Name	Yes	
Last Name	Client Details/Personal Details/Last Name	Yes	
Email	Client Details/Contact Details/Email	Yes	
Gender	Client Details/Personal Details/Gender	Yes	
Birthdate	Client Details/Personal Details/Birthdate	Yes	
Estate of residence	Client Details/Contact Details/Address	Yes	
Is client retired	Employment & Income/Employment/Job Position		No, if the field is empty.
Occupation	Employment & Income/Employment/Job Position		
Net Worth Type			By default, it is a number.
Net Worth	Cash Flow & Net Worth/Net Worth/Net Worth		
Net Worth Range			
Non-Resident Alien			
Co-Client (In Case Marital Status Is Not 'Single')			
First Name	Client Details/Personal Details/First Name	Yes	
Last Name	Client Details/Personal Details/Last Name	Yes	
Email			
Gender	Client Details/Personal Details/Gender	Yes	
Birthdate	Client Details/Personal Details/Birthdate	Yes	
Estate of residence	Client Details/Contact Details/Address	Yes	
Is client retired	Employment & Income/Employment/Job Position		No, if the field is empty.
Occupation	Employment & Income/Employment/Job Position		
Net Worth Type			By default, it is a number.
Net Worth	Cash Flow & Net Worth/Net Worth/Net Worth		
Net Worth Range			
Non-Resident Alien			

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

Assets Information			
FPAlpha	**PreciseFP**	**Required**	**Comments**
Real Estate			
Nickname	Assets/Personal Property/Name	Yes	
Owner/Title	Assets/Personal Property/Owner		If no owner is found, by default it is the Client.
Market Value	Assets/Personal Property/Current Value	Yes	
Real Estate Type	Assets/Personal Property/Type	Yes	Precise FP Type // FP Alpha Type Personal Property/Main Residence => Primary Residence
Location			
Cost Basis			
Business			
Name	Assets/Business Assets/Name	Yes	
Owner/Title	Assets/Business Assets/Owner	Yes	If no owner is found, by default it is the Client.
Fair Market Value	Assets/Business Assets/Current Value	Yes	
Structure			
Location			
Ownership Percentage			
Retirement			
Account Type	Retirement Plans/401 (k) Retirement Plans/Roth 401(k) Retirement Plans/403(b) Retirement Plans/457(b) Retirement Plans/IRA Retirement Plans/Roth IRA Retirement Plans/Simple IRA Retirement Plans/SEP IRA Retirement Plans/Pensions Retirement Plans/Other	Yes	Precise Type // FP Alpha Type 401 (k) => 401(k) Roth 401(k) => Roth 401(k) 403(b) => 403(b) 457(b) => 457 Plan IRA => Traditional IRA Roth IRA => Roth IRA Simple IRA => Other SEP IRA => Other

			Pensions => Other Other => Other
Nickname	Retirement Plans/{Account Type}/Name	Yes	
Owner/Title	Retirement Plans/{Account Type}/Owner	Yes	If no owner is found, by default it is the Client.
Account Value	Retirement Plans/{Account Type}/Account Value	Yes	
Beneficiaries	Retirement Plans/{Account Type}/Primary Beneficiary		
Contingent Beneficiaries	Retirement Plans/{Account Type}/Secondary Beneficiary		
Non Retirement			
Account Type	Assets/Bank Accounts Assets/Certificates of Deposit Assets/Taxable Investment Accounts Assets/Annuities Assets/Other Assets	Yes	Precise Types // FP Alpha Types Bank Accounts => Bank/Savings/Checking Certificates of Deposit => Other Taxable Investment Accounts => Brokerage/Taxable Annuities => Brokerage/Taxable Other Assets => Other
Nickname	Assets/{Account Type}/Name	Yes	
Owner/Title	Assets/{Account Type}/Owner	Yes	If no owner is found, by default it is the Client.
Account Value	Assets/{Account Type}/Current Value Or Average Balance	Yes	
Beneficiaries			
Contingent Beneficiaries			
Life Insurance			

Type	Insurance/Life Insurance/Type	Yes	Precise Type // Fp Alpha Types Term Life. => Term Whole Life => Whole/Cash Value Universal Life. => Whole/Cash Value Variable Life => Whole/Cash Value Variable Universal Life => Whole/Cash Value
Nickname	Insurance/Life Insurance/Name	Yes	
Policy Owner	Insurance/Life Insurance/Insured	Yes	If no owner is found, by default it is the Client.
Death Benefit Amount	Insurance/Life Insurance/Coverage Amount	Yes	
Whose Life is Insured?			
Cash Value	Insurance/Life Insurance/Cash Value		
Beneficiaries	Insurance/Life Insurance/Primary Beneficiary		
Contingent Beneficiaries	Insurance/Life Insurance/Secondary Beneficiary		
College Saving			
Type	Assets/Collage Funds	Yes	The type in FP Alpha will be "Other"
Plan Nickname	Assets/Collage Funds/Name	Yes	
Custodian	Assets/Collage Funds/Owner	Yes	If no custodian is found, by default it is the Client.
Account Value	Assets/Collage Funds/Current Balance	Yes	
Beneficiaries	Assets/Collage Funds/Beneficiary		
Contingent Beneficiaries			
Loan/Liability			

Type	Liabilities/Loans/Type		Precise Type // Fp Alpha Types
			Student => Studen Loan
			Auto => Car Loan
			Business => Other

			Credit Line => Other Personal Note => Personal Loan
Nickname	Liabilities/Loans/Name	Yes	
Loan Owner	Liabilities/Loans/Owner	Yes	If no owner is found, by default it is the Client.
Loan Amount	Liabilities/Loans/Current Balance	Yes	
Interest Rate	Liabilities/Loans/Interest Rate		