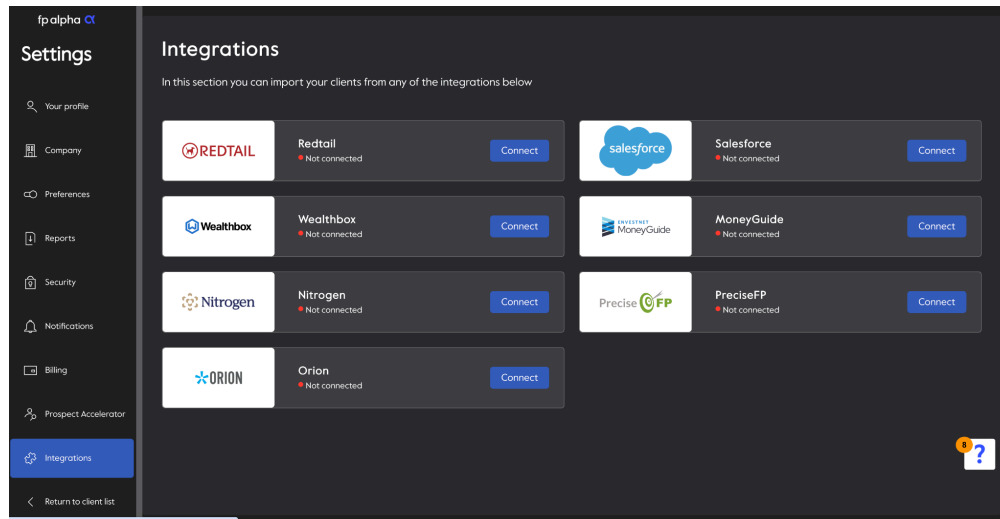


Salesforce

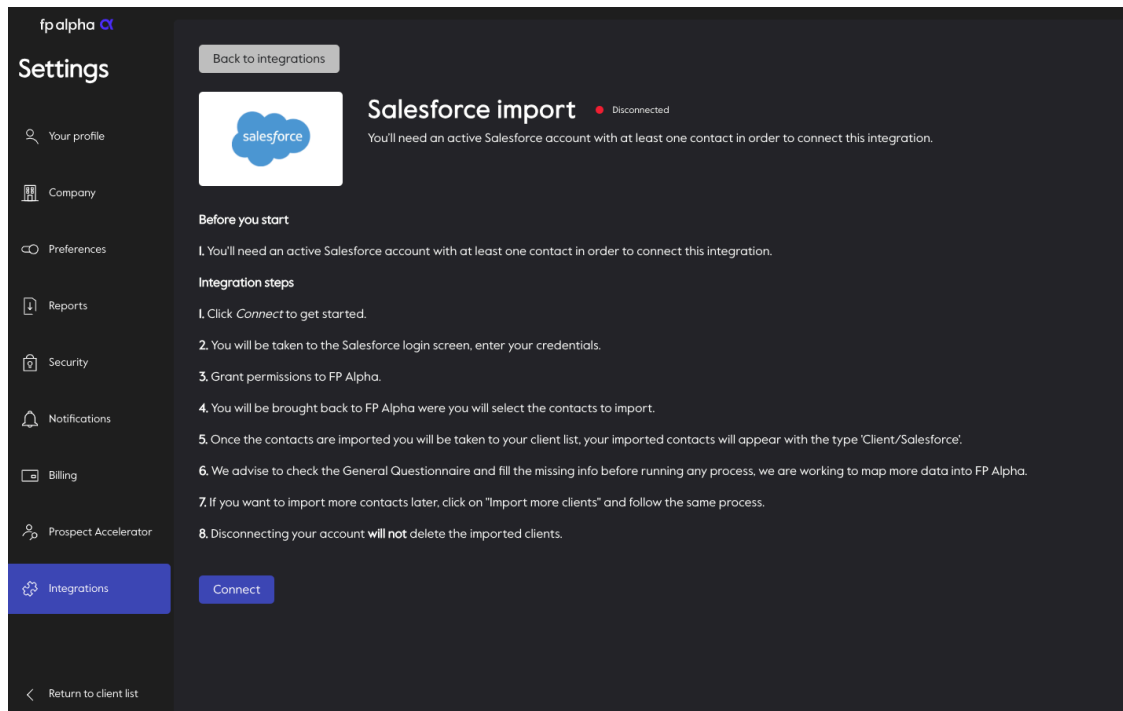
How to Integrate

Setting up the integration

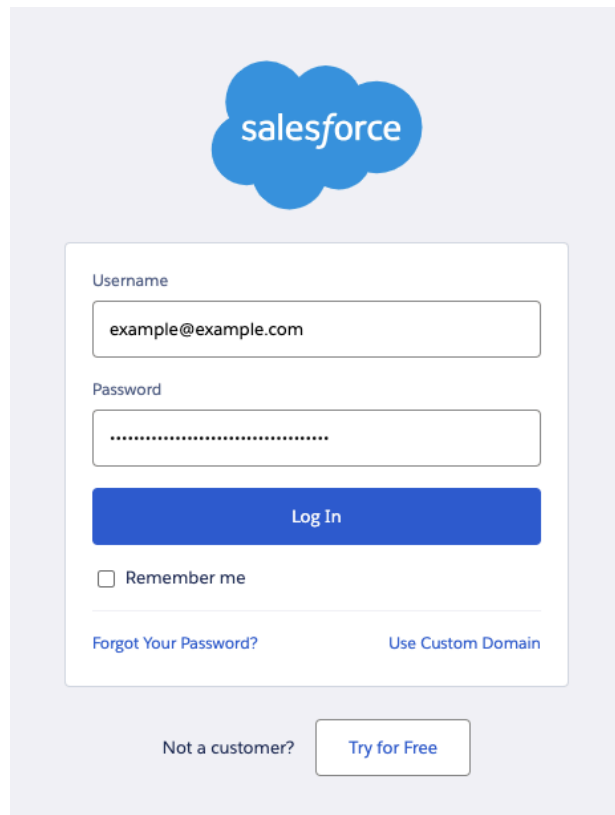
Once you're logged in to your FP Alpha account, navigate to Account > Settings > Integrations. You'll see a screen with all FP Alpha integrations.



Select the Salesforce 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 Salesforce login screen to enter your credentials.



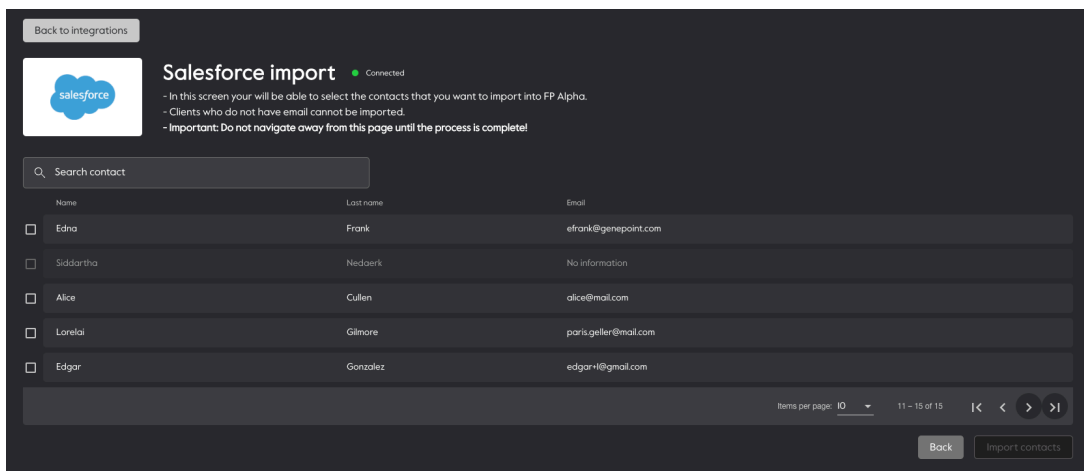
The image shows a Salesforce login interface. At the top center is the Salesforce logo, which consists of a blue cloud shape with the word "salesforce" in white lowercase letters. Below the logo is a white rectangular form with a thin border. Inside the form, there are two input fields: the first is labeled "Username" and contains the text "example@example.com"; the second is labeled "Password" and contains a series of dots. Below the password field is a blue button with the text "Log In" in white. Underneath the button is a checkbox labeled "Remember me". At the bottom of the form, there are two links: "Forgot Your Password?" on the left and "Use Custom Domain" on the right. Below the form, there is the text "Not a customer?" followed by a button labeled "Try for Free".

Importing contacts

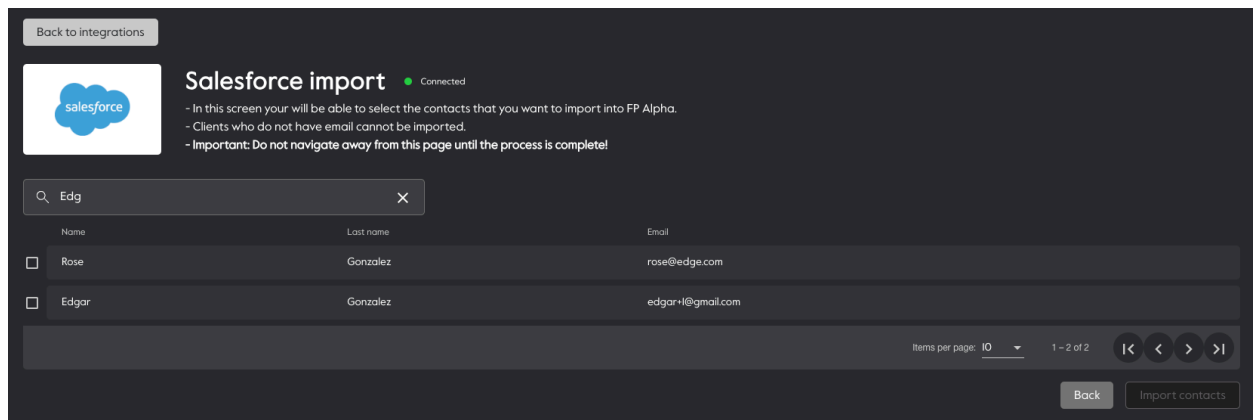
If the authentication is successful, you will be redirected back to FP Alpha to select your clients.

In this section, you'll find all your Salesforce 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".



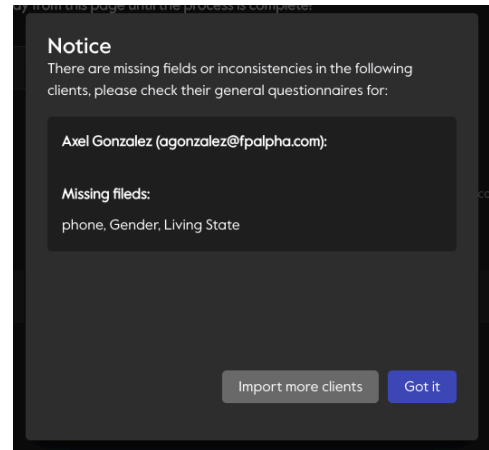
After you've finished selecting your contacts, click on 'Import Contacts'.

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

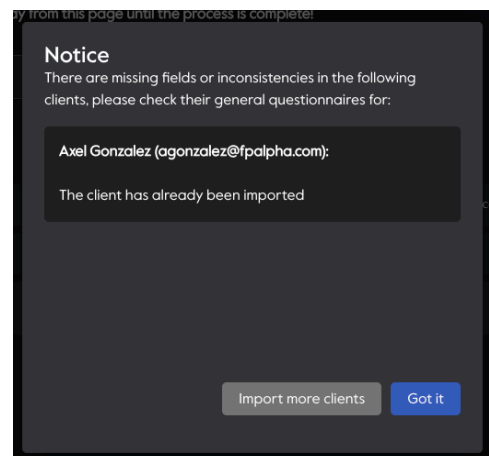
This pop-up will show when there's important information missing from the client.

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



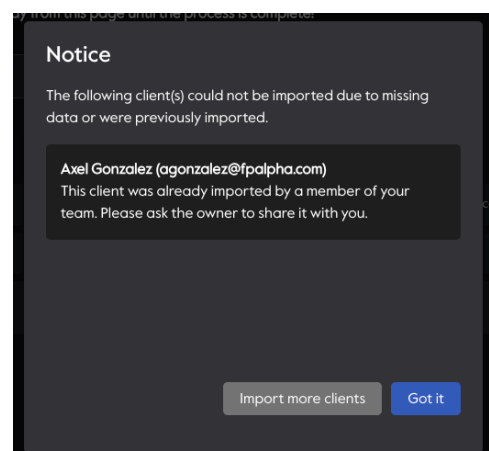
Client already imported

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



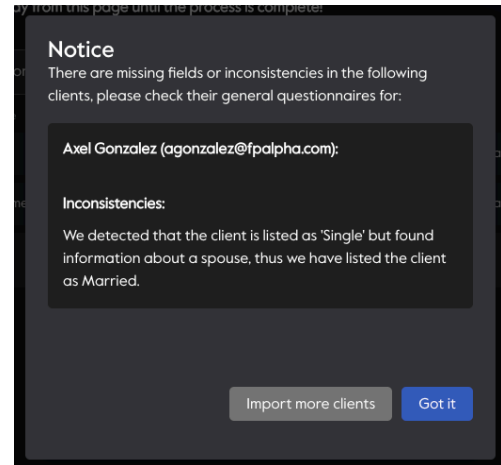
The client was imported by another member of the company

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.



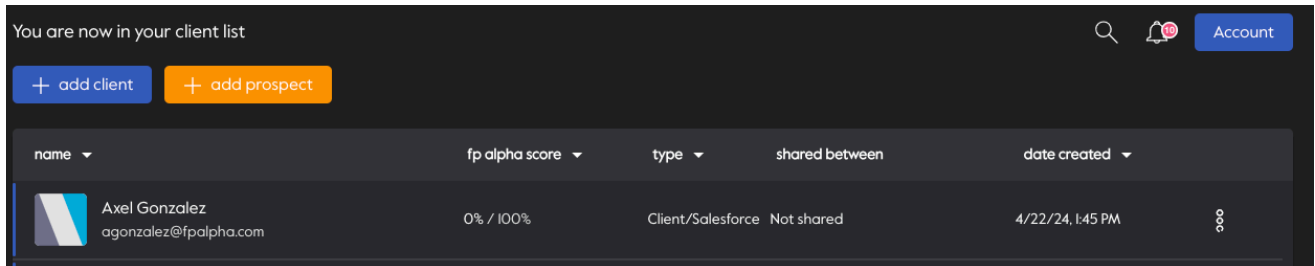
Inconsistencies

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

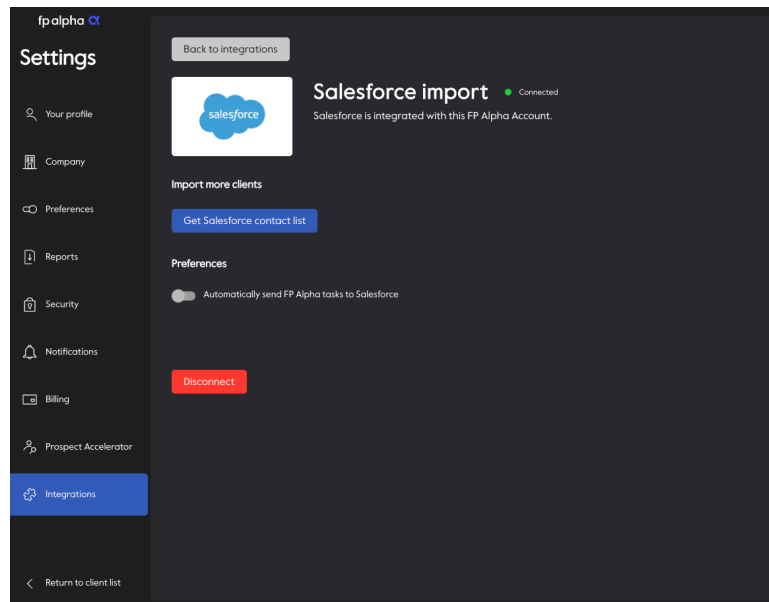
Once the contacts are imported you will be taken to your client list, and your imported contacts will appear with the type 'Client/Salsforce'.



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			
FPAAlpha	Salesforce	Required	Comments
Client			
Marital Status	Contacts/Marital Status		
First Name	Contacts/First Name	Yes	
Last Name	Contacts/Last Name	Yes	
Email	Contacts/Email	Yes	
Gender	Contacts/Salutation	Yes	
Birthdate	Contacts/Birthdate	Yes	
Estate of residence	Contacts/Mailing State	Yes	
Is client retired	Contacts/Title		No, when this field is empty.
Occupation	Contacts/Title		
Net Worth Type			
Net Worth	Contacts/Net Worth		
Net Worth Range			
Non Resident Alien			