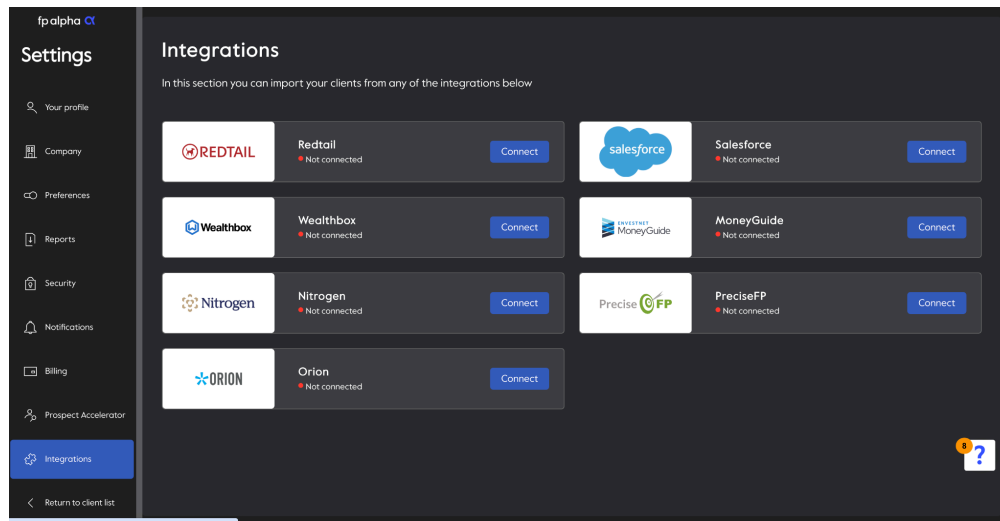


Wealthbox

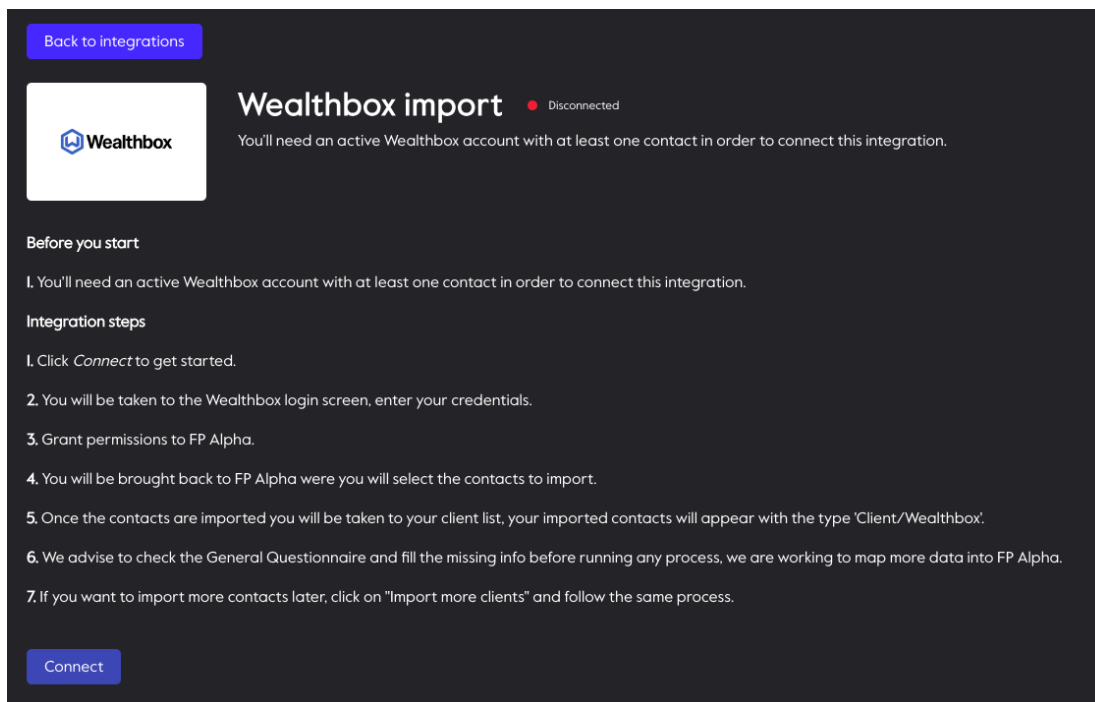
How to Integrate

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 Wealthbox 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 Wealthbox login screen to enter your credentials.



Log in to your account

Don't have an account? [Sign up](#)

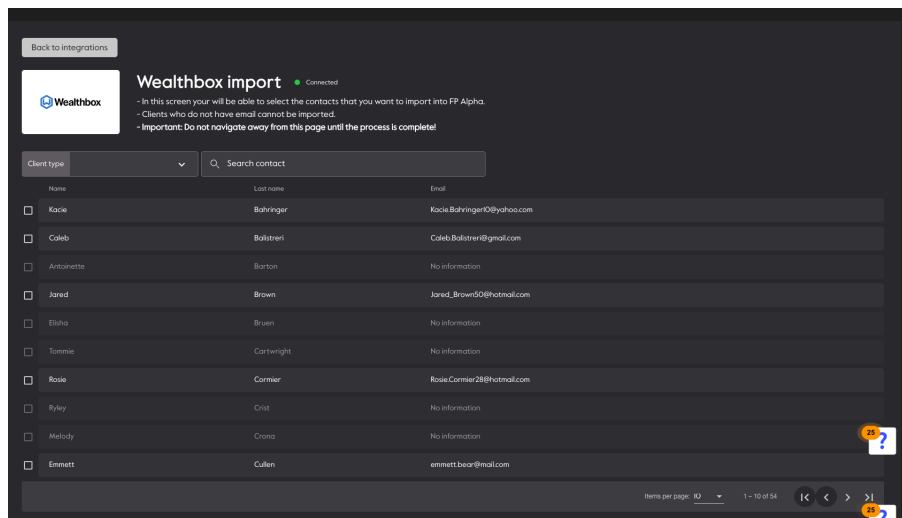
[Forgot password?](#)

Importing contacts

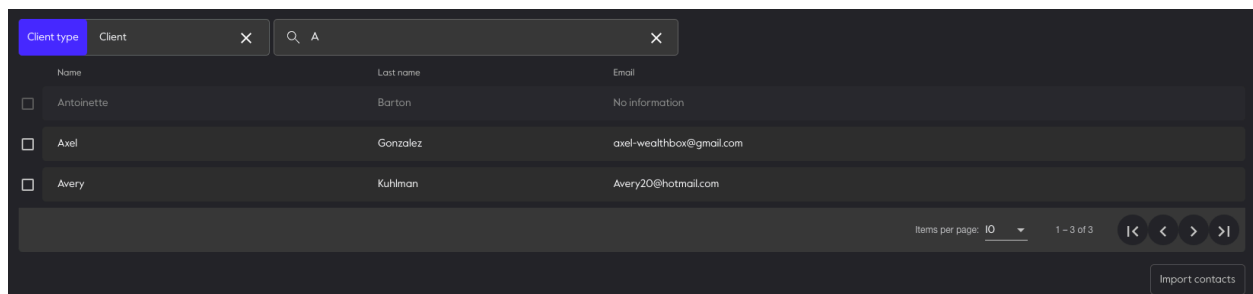
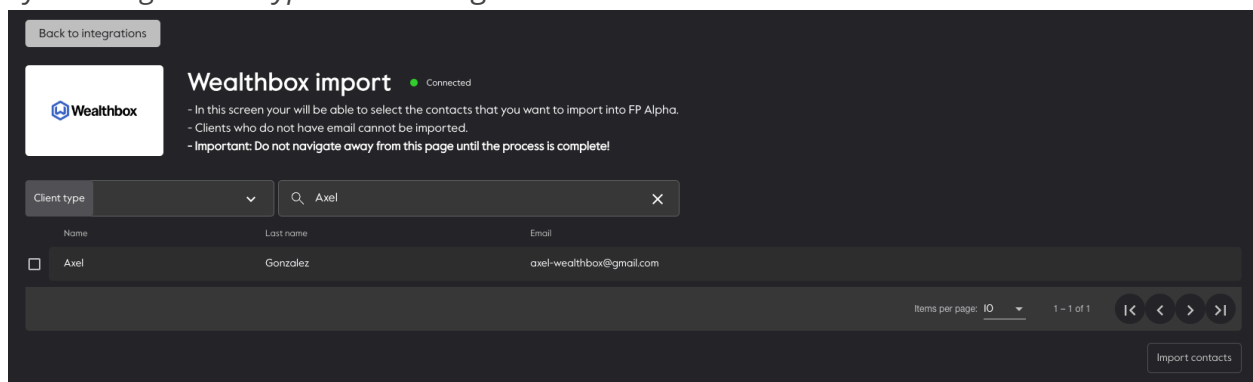
If the authentication is successful, you will be redirected back to FP Alpha to select your clients.

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



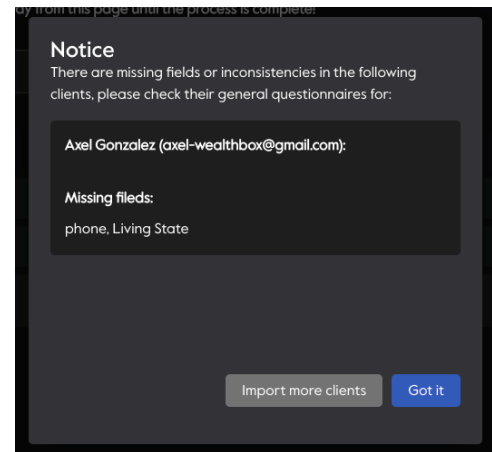
After you've finished selecting your contacts, click on 'Import Contacts'.

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

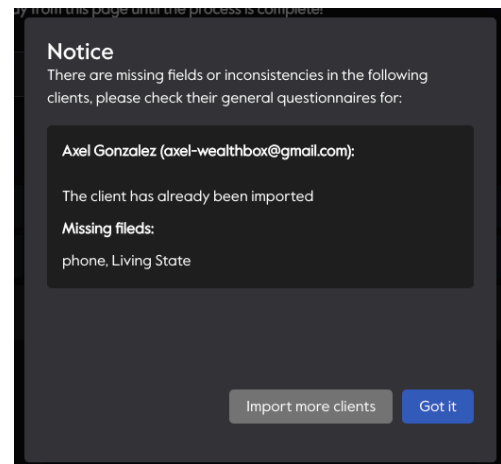
This pop-up will show when there's important information missing from the client.

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



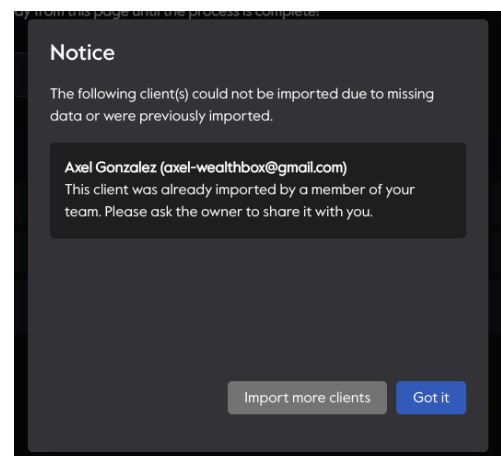
Client already imported

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

from this page and the process is complete.

Notice
There are missing fields or inconsistencies in the following clients, please check their general questionnaires for:

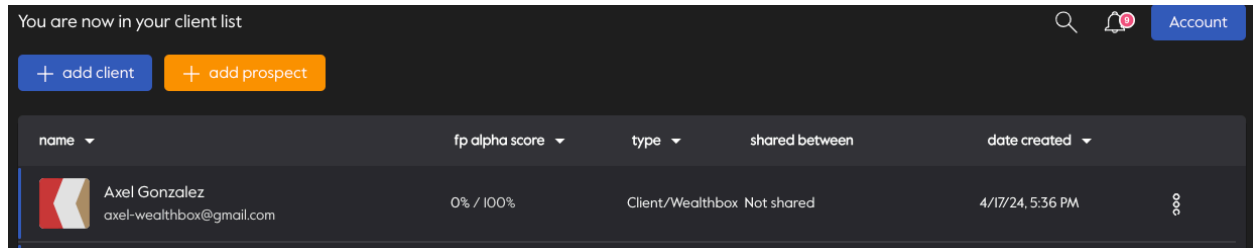
Axel Gonzalez (agonzalez@fpalpha.com):

Inconsistencies:
We detected that the client is listed as 'Single' but found information about a spouse, thus we have listed the client as Married.

[Import more clients](#) [Got it](#)

After importing contacts

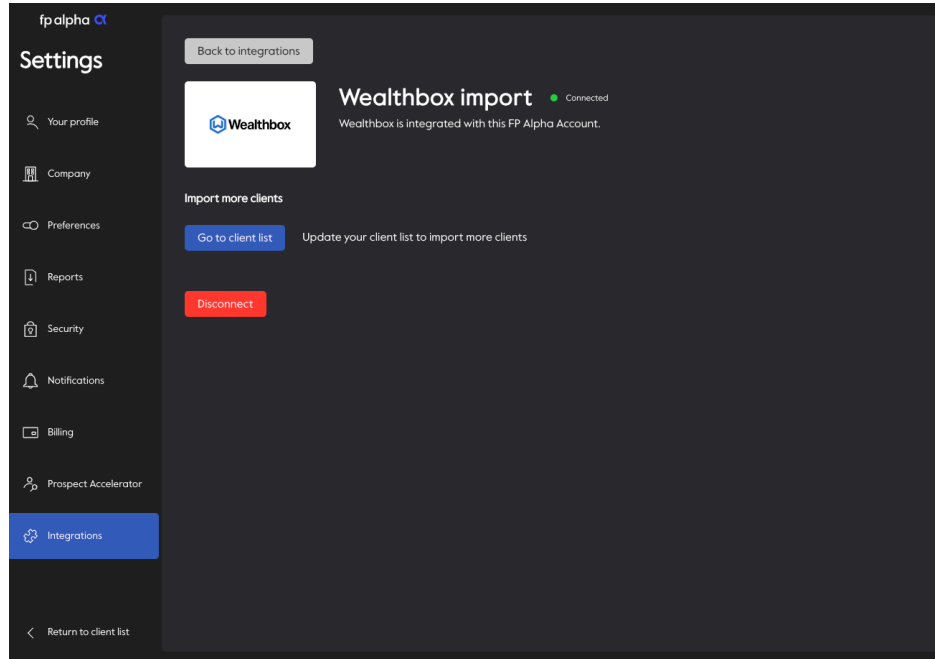
Once the contacts are imported you will be taken to your client list, and your imported contacts will appear with the type 'Client/Wealthbox'.



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	Wealthbox	Required	Comments
Client			
Marital Status	Contacts/Marital Status		
First Name	Contacts/First Name	Yes	
Middle Name	Contacts/Middle Name		
Last Name	Contacts/Last Name	Yes	
Email	Contacts/Email Address	Yes	
Gender	Contacts/Gender	Yes	
Birthdate	Contacts/Especial Dates/Birthdate	Yes	
Estate of residence	Contacts/Street Address/State	Yes	
Is client retired	Contacts/Company/Job Title		No, when this field is empty.
Occupation	Contacts/Company/Job Title		
Net Worth Type			By default, it is a number.
Net Worth	Contacts/Net Worth		
Net Worth Range			
Non Resident Alien			
Co-Client (In Case Marital Status Is 'Married')			
First Name	Contacts/First Name	Yes	
Middle Name	Contacts/Middle Name	Yes	
Last Name	Contacts/Last Name		
Email	Contacts/Email Address		
Gender	Contacts/Gender	Yes	
Birthdate	Contacts/Especial Dates/Birthdate	Yes	
Estate of residence	Contacts/Street Address/State	Yes	
Is client retired	Contacts/Company/Job Title		No, when this field is empty.
Occupation	Contacts/Company/Job Title		
Net Worth Type			By default, it is a

			number.
Net Worth	Contacts/Net Worth		
Net Worth Range			
Non Resident Alien			

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