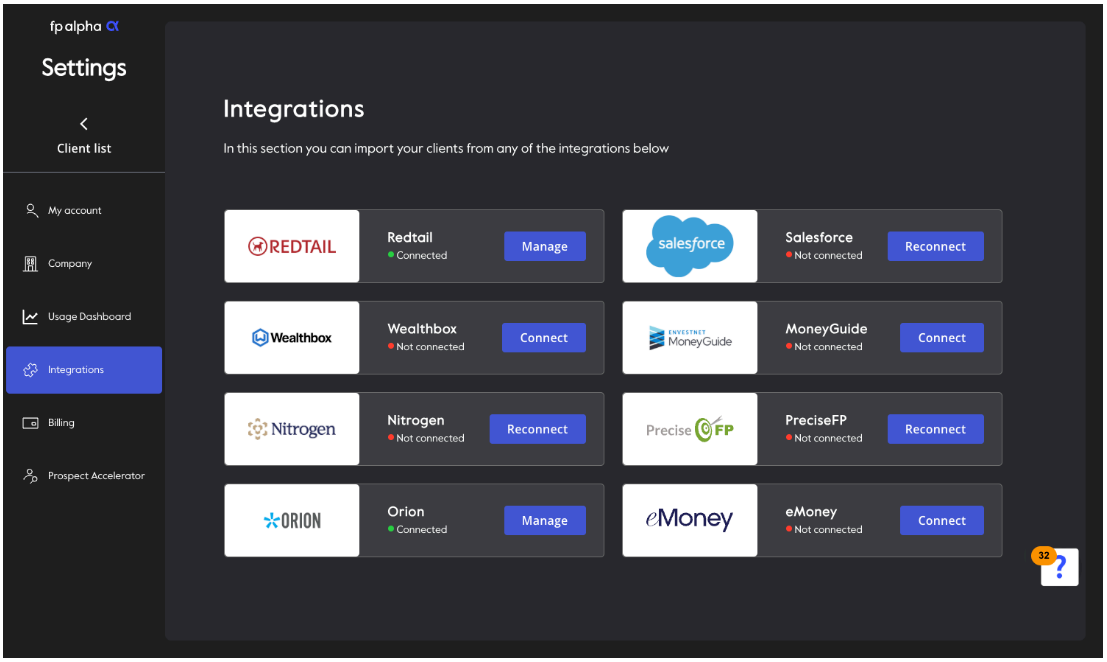
fp alpha

eMoney

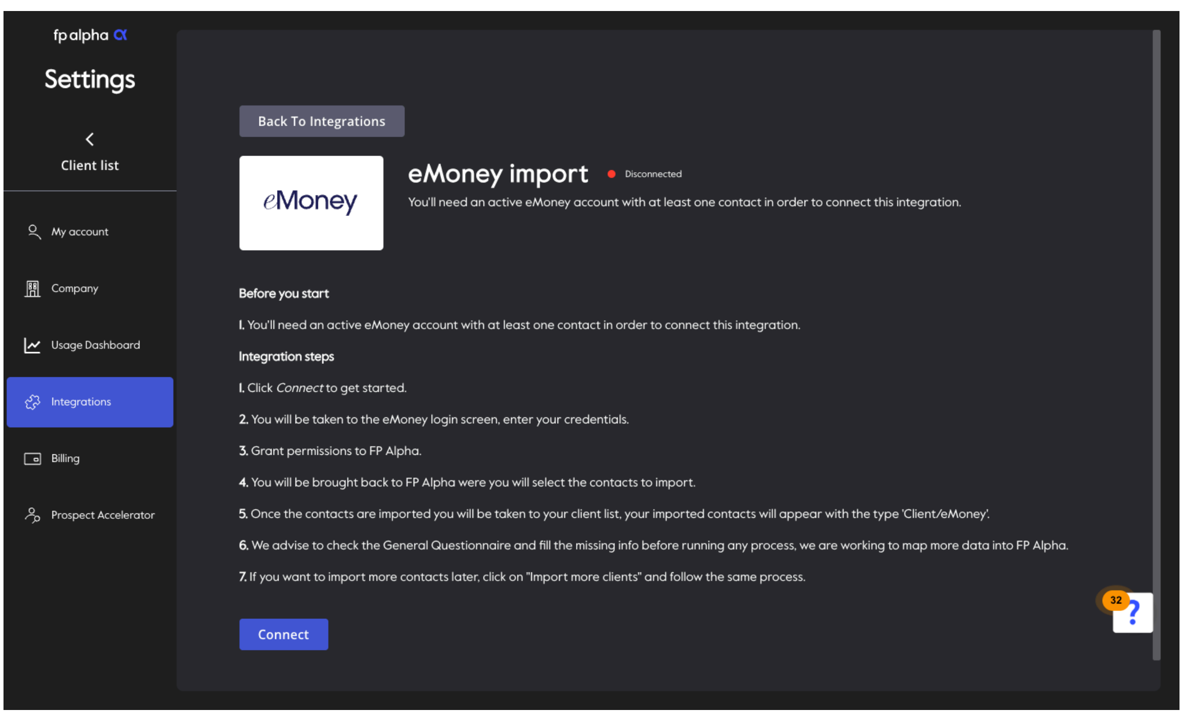
How to Integrate

Setting up the integration

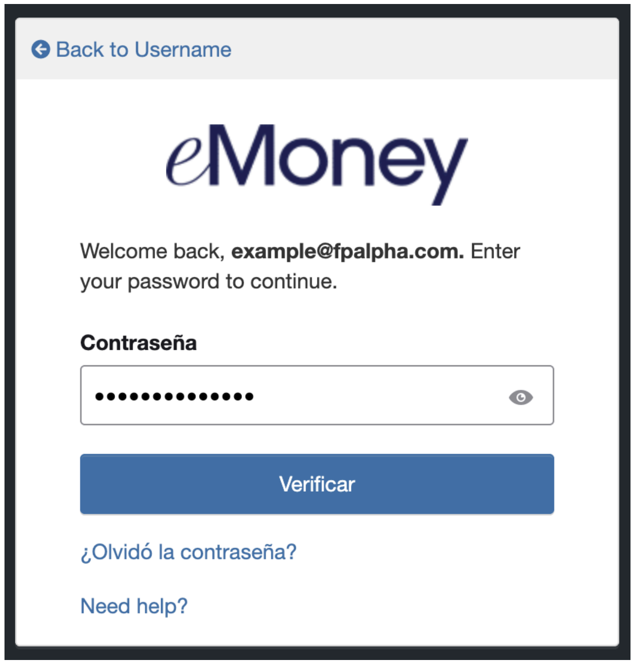
Once you're logged in to your FP Alpha account, navigate to Account > Settings > Integrations. You'll see a screen with all FP Alpha integrations.

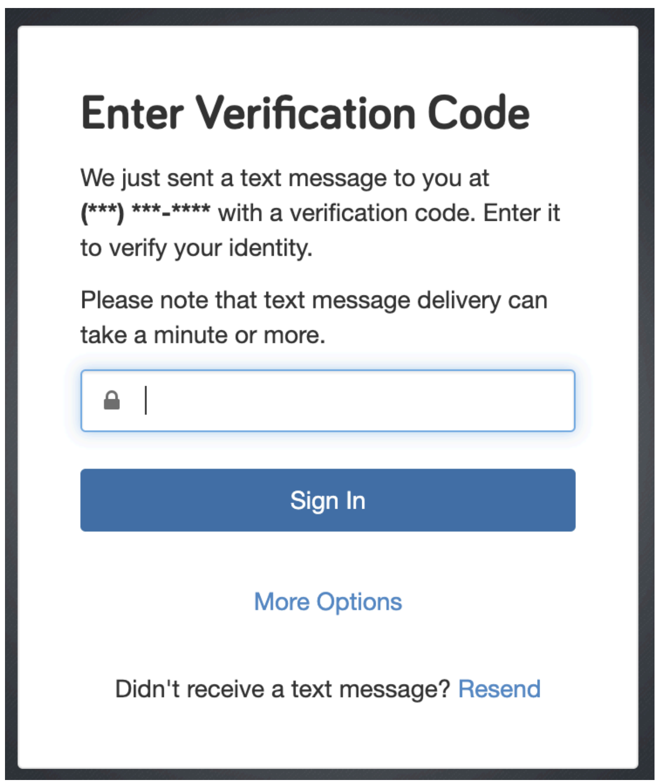


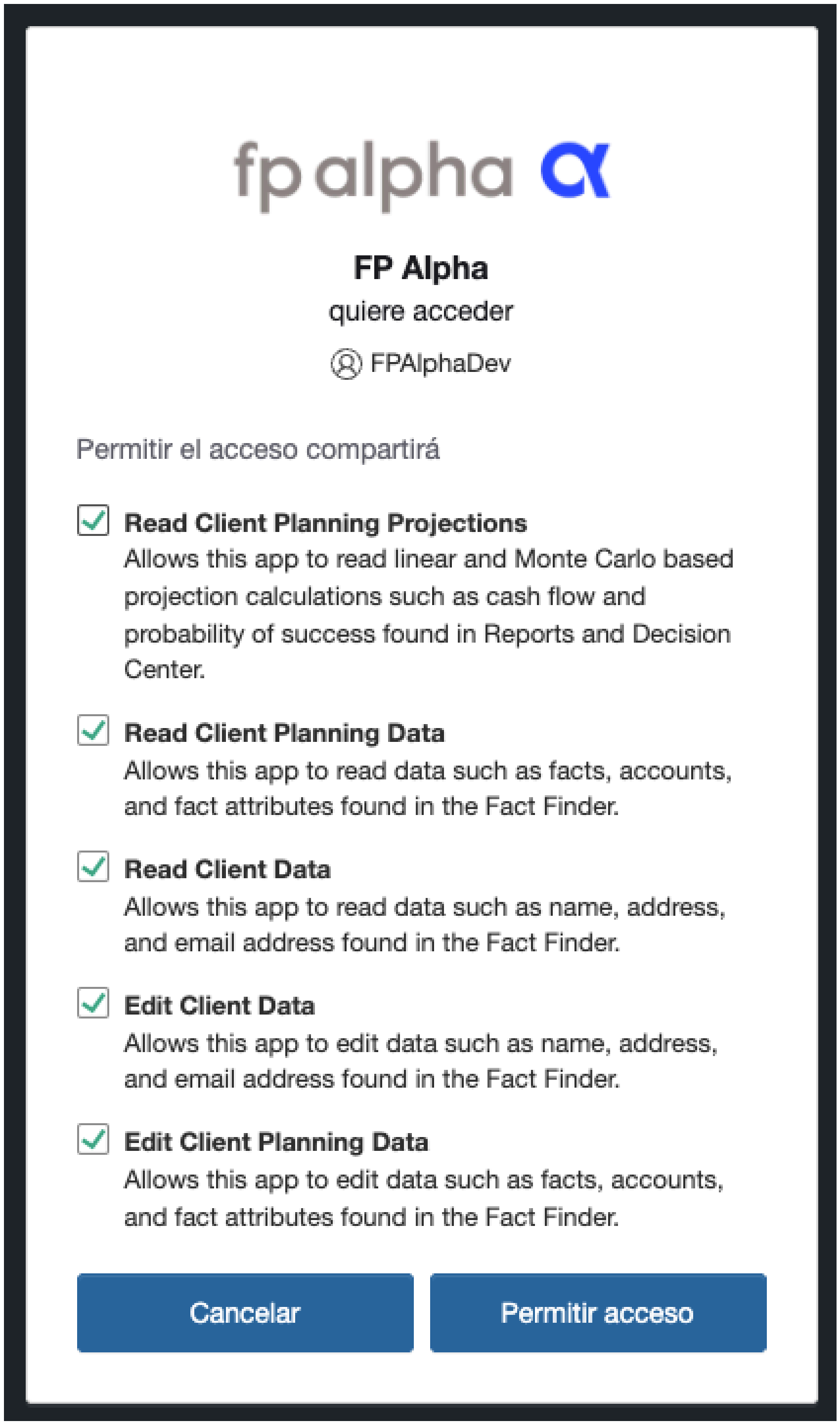
Select the eMoney option and it will take you to a new screen with the integration instructions. Click on "*Connect*" to get started.



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


Back to Username
eMoney
Welcome back, example@fpalpha.com. Enter your password to continue.
Contraseña
Verificar
¿Olvidó la contraseña?
Need help?


Enter Verification Code
We just sent a text message to you at (***) ***-**** with a verification code. Enter it to verify your identity.
Please note that text message delivery can take a minute or more.
Sign In
More Options
Didn't receive a text message? Resend

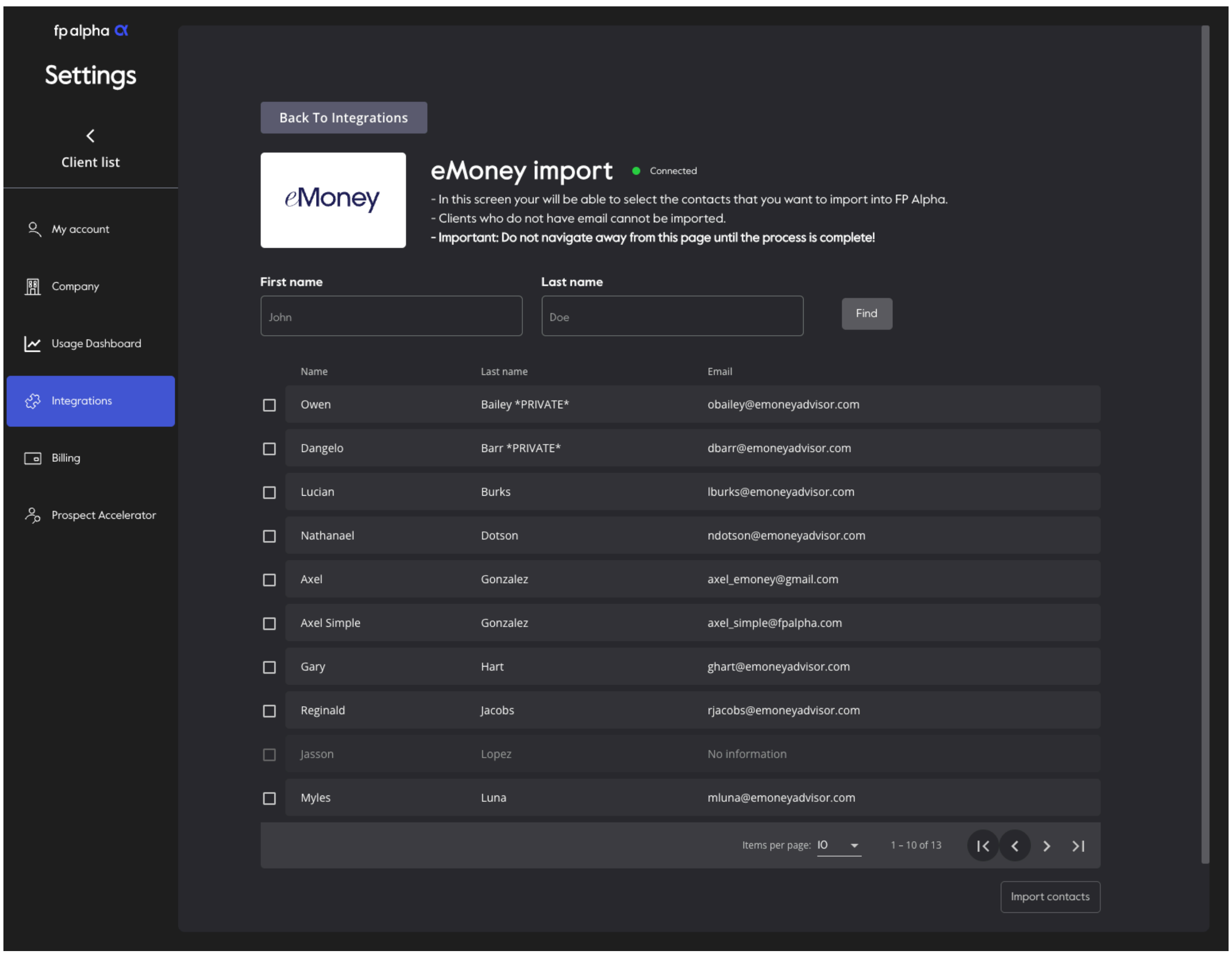

FP Alpha
quiere acceder
FPAlphaDev
Permitir el acceso compartirá
Read Client Planning Projections
Allows this app to read linear and Monte Carlo based projection calculations such as cash flow and probability of success found in Reports and Decision Center.
Read Client Planning Data
Allows this app to read data such as facts, accounts, and fact attributes found in the Fact Finder.
Read Client Data
Allows this app to read data such as name, address, and email address found in the Fact Finder.
Edit Client Data
Allows this app to edit data such as name, address, and email address found in the Fact Finder.
Edit Client Planning Data
Allows this app to edit data such as facts, accounts, and fact attributes found in the Fact Finder.
Cancelar
Permitir acceso

Importing contacts

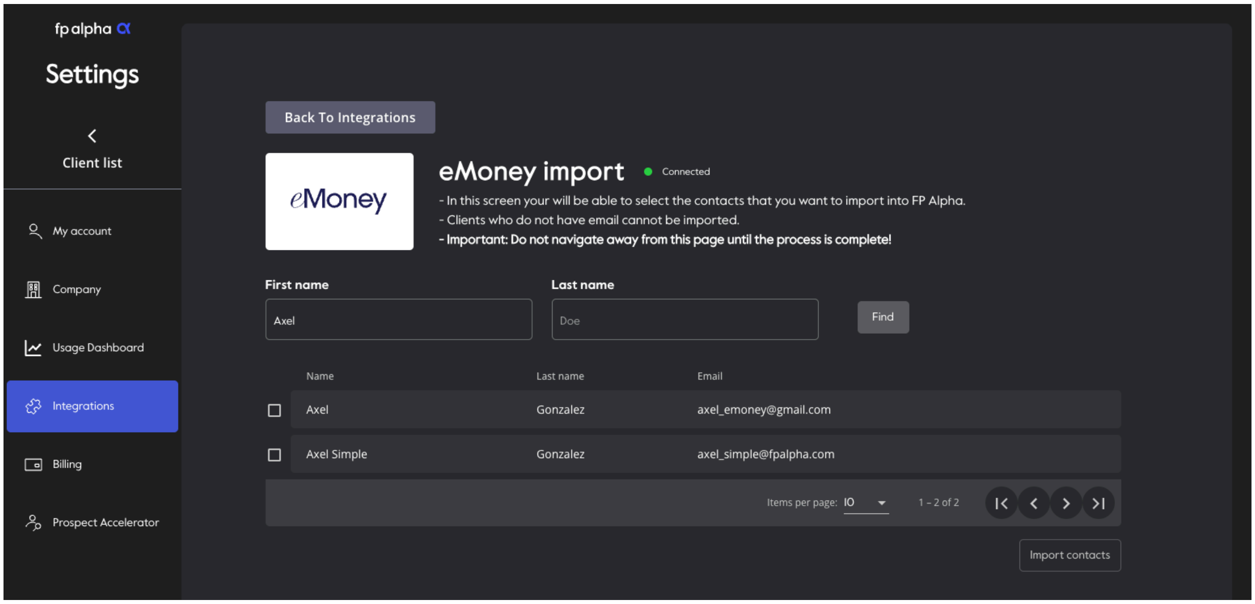
If the authentication is successful, you will be redirected back to FP Alpha to select your clients.

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


fp alpha
Settings
Client list
My account
Company
Usage Dashboard
Integrations
Billing
Prospect Accelerator
Back To Integrations
eMoney
eMoney import
Connected
- In this screen your will be able to select the contacts that you want to import into FP Alpha.
- Clients who do not have email cannot be imported.
- Important: Do not navigate away from this page until the process is complete!
First name
Axel
Last name
Doe
Find
Name
Last name
Email
Axel
Gonzalez
axel_emoney@gmail.com
Axel Simple
Gonzalez
axel_simple@fpalpha.com
Items per page: 10
1 – 2 of 2
Import contacts

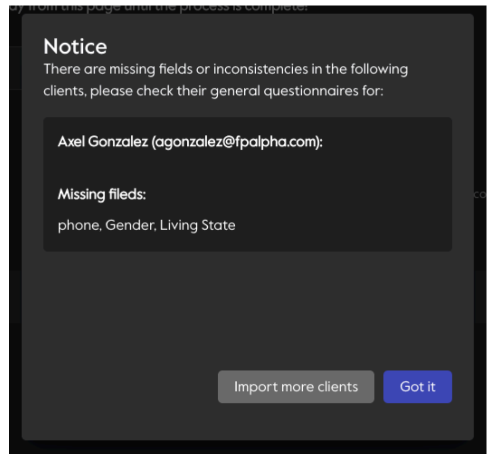
After you've finished selecting your contacts, click on 'Import Contacts'.

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

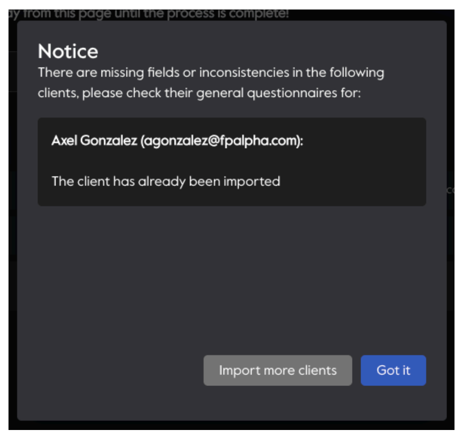
This pop-up will show when there's important information missing from the client.

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

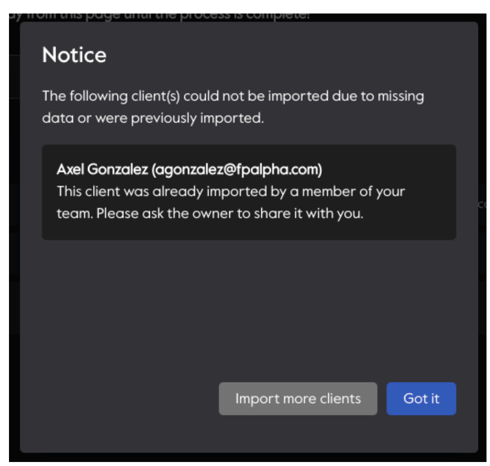
This popup will show when the client was already imported by you and some of their information was updated due to the re-import



The client was imported by another member of the company

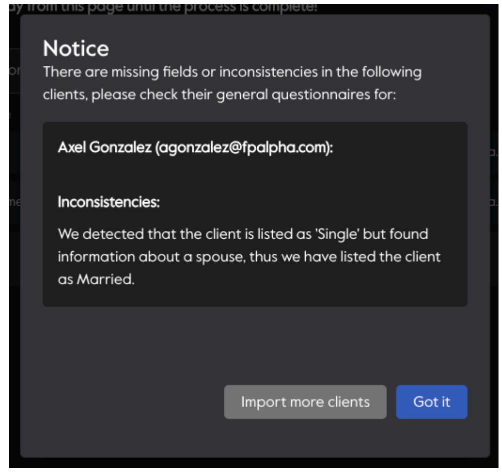
FP Alpha doesn't allow having repeated clients, therefore you'll see this popup if you try to import a client that was already imported by someone in your company.

It won't show the inconsistencies or warnings



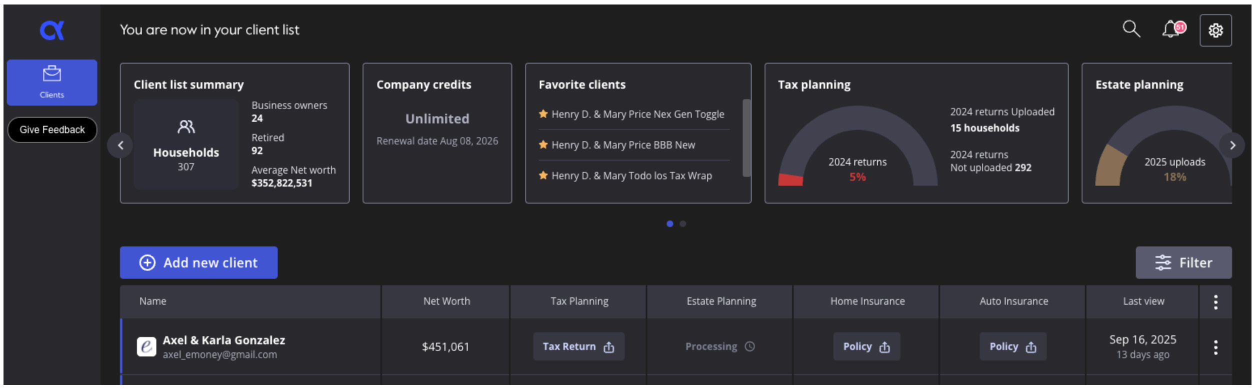
Inconsistencies

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

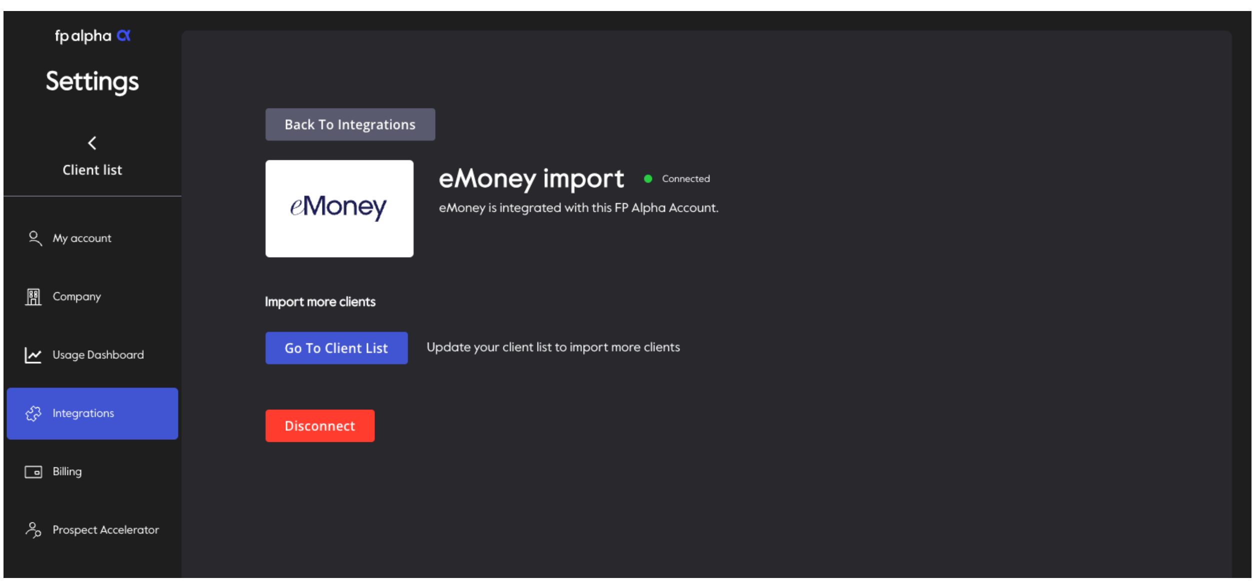
Once the contacts are imported you will be taken to your client list, and your imported contacts will appear with the icon of eMoney.



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	**eMoney**	**Required**	**Comments**
Client			
Marital Status	Facts/Family & Friends/Marital Status	Yes	
First Name	Facts/Family & Friends/Full Name	Yes	
Last Name	Facts/Family & Friends/Full Name	Yes	
Email	Facts/click on edit/Contact Info/E-mail	Yes	
Gender	Facts/Family & Friends/Gender	Yes	
Birthdate	Facts/Family & Friends/Date of Birth	Yes	
Estate of residence	Facts/click on edit/Contact Info/City, State, Zip	Yes	
Is client retired	Facts/click on edit/Employment Info/Title Position		
Occupation	Facts/click on edit/Employment Info/Title Position		
Net Worth Type			by default is 'number'
Net Worth	Facts/Net Worth/Total Net Worth		
Net Worth Range			
Non Resident Alien			
Co-Client (In Case Marital Status Is Not 'Single')			
First Name	Facts/Family & Friends/Marital Status	Yes	
Last Name	Facts/Family & Friends/Full Name	Yes	
Email			
Gender	Facts/click on edit/Contact Info/E-mail	Yes	
Birthdate	Facts/Family & Friends/Gender	Yes	
Estate of residence	Facts/Family & Friends/Date of Birth	Yes	
Is client retired	Facts/click on edit/Contact Info/City, State, Zip		

Occupation	Facts/click on edit/Employment Info/Title Position		
Net Worth Type	Facts/click on edit/Employment Info/Title Position		
Net Worth			
Net Worth Range	Facts/Net Worth/Total Net Worth		
Non Resident Alien			

Family Information			
FPAlpha	**eMoney**	**Required**	**Comments**
Children			
Name	Facts/Family & Friends/section Children	Yes	
Date of birth	Facts/Family & Friends/section Children/date of birth		
Parent(s)			
Full time college student			
Disability?			
Grandchildren			
Name	Facts/Family & Friends/section Children	Yes	
Date of birth	Facts/Family & Friends/section Children/date of birth		
Other beneficiaries			
Do the clients want to add more beneficiaries?	Facts/Family & Friends/section Children		
Name	Facts/Family & Friends/section Children/date of birth	Yes	
Relationship	Facts/Family & Friends/section Children/Relationship		

Assets Information			
FPAlpha	**eMoney**	**Required**	**Comments**
Real Estate			
Nickname	Facts/Net worth/click on the asset/Name	Yes	
Owner/Title	Facts/Net worth/click on the asset/Owner	Yes	
Market Value	Facts/Net worth/click on the asset/Value	Yes	
Real Estate Type	Facts/Net worth/click on the asset/Property Type/	Yes	realestates personalproperties
Location			
Cost Basis			
Business			
Name	Facts/Net worth/click on the asset/Name	Yes	
Owner/Title	Facts/Net worth/click on the asset/Owner	Yes	
Fair Market Value	Facts/Net worth/click on the asset/Value	Yes	
Structure			businessinterests
Location			
Ownership Percentage			
Retirement			
Account Type	Facts/Net worth/click on the asset/Type	Yes	qualifiedretirement rothira annuities
Nickname	Facts/Net worth/click on the asset/Name	Yes	
Owner/Title	Facts/Net worth/click on the asset/Owner	Yes	
Account Value	Facts/Net worth/click on the asset/Value	Yes	
Beneficiaries	Facts/Net worth/click on the asset/Beneciary		

Contingent Beneficiaries			
Non Retirement			
Account Type	Facts/Net worth/click on the asset/Type	Yes	taxableinvestments cash hsa stockoptions deferredcompensation notesreceivable
Nickname	Facts/Net worth/click on the asset/Name	Yes	
Owner/Title	Facts/Net worth/click on the asset/Owner	Yes	
Account Value	Facts/Net worth/click on the asset/Value	Yes	
Beneficiaries	Facts/Net worth/click on the asset/Beneciary		
Contingent Beneficiaries			
Life Insurance			
Type	Facts/Net worth/click on the asset/Type	Yes	life
Nickname	Facts/Net worth/click on the asset/Name	Yes	
Policy Owner	Facts/Net worth/click on the asset/Owner	Yes	
Death Benefit Amount	Facts/Net worth/click on the asset/Value	Yes	
Whose Life is Insured?			
Cash Value			
Beneficiaries	Facts/Net worth/click on the asset/Beneciary		
Contingent Beneficiaries			
College Saving			
Type	Facts/Net worth/click on the asset/Type	Yes	529plans

Plan Nickname	Facts/Net worth/click on the asset/Name	Yes	
Custodian		Yes	
Account Value	Facts/Net worth/click on the asset/Value	Yes	
Beneficiaries	Facts/Net worth/click on the asset/Beneciary		
Contingent Beneficiaries			
Loan/Liability			
Type	Facts/Net worth/click on the asset/Type		mortgage fixedterm creditline studentloan
Nickname	Facts/Net worth/click on the asset/Name	Yes	
Loan Owner	Facts/Net worth/click on the asset/Owner	Yes	
Loan Amount		Yes	
Interest Rate			