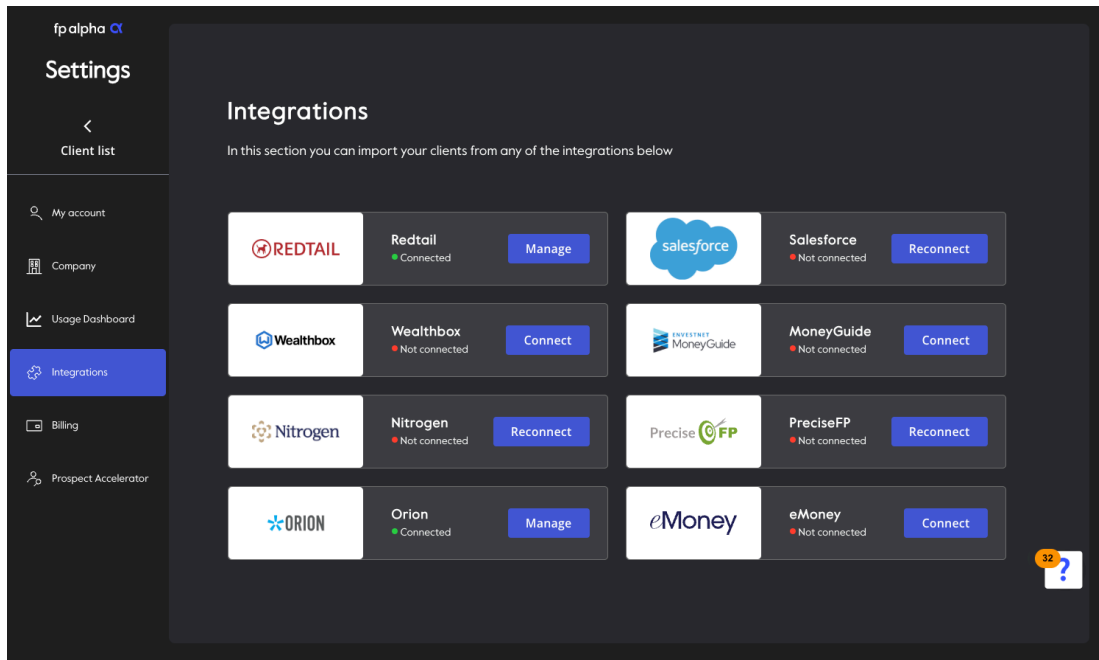


**eMoney**

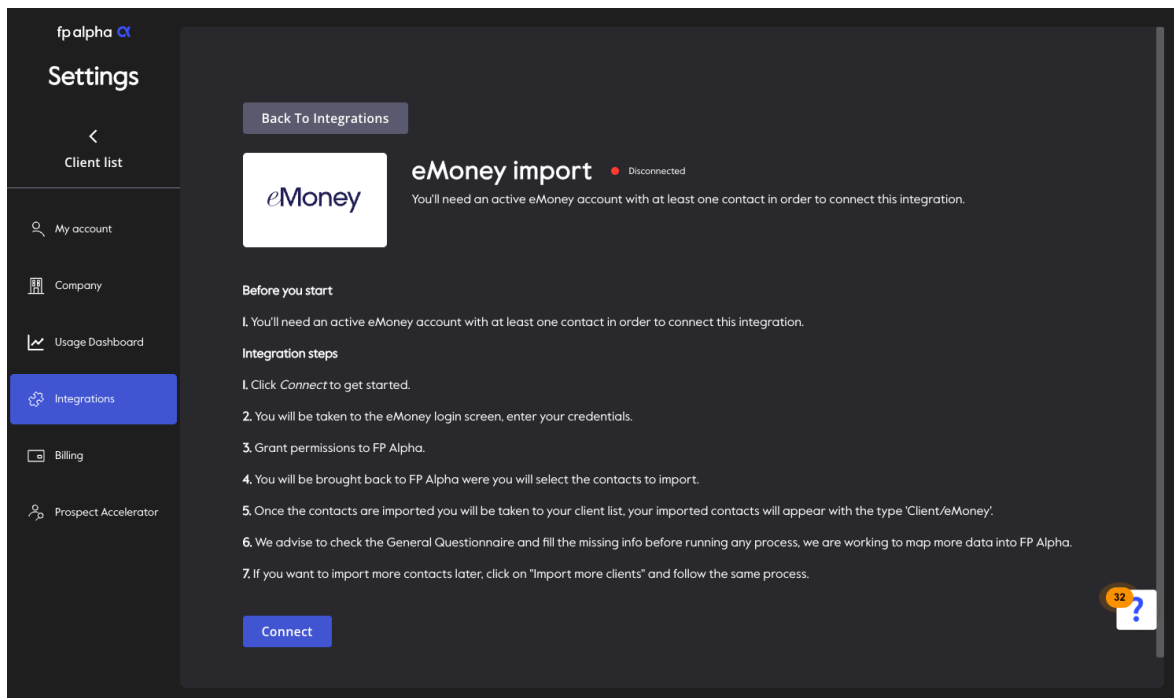
**How to Integrate**

## Setting up the integration

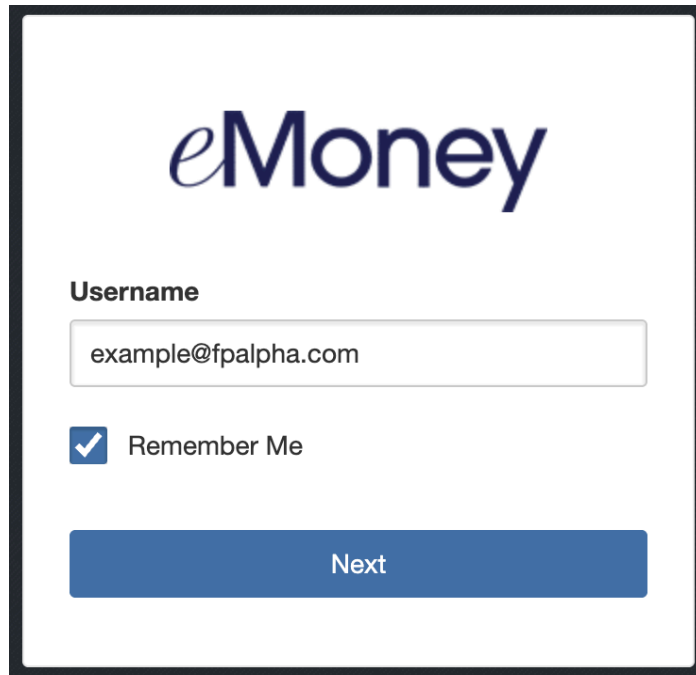
Once you're logged in to your FP Alpha account, navigate to Account > Settings > Integrations. You'll see a screen with all FP Alpha integrations.



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.




The image shows a login screen for eMoney. At the top center is the eMoney logo. Below it is a 'Username' label followed by a text input field containing 'example@fpalpha.com'. Underneath the input field is a checked checkbox labeled 'Remember Me'. At the bottom of the form is a blue button with the text 'Next'.

[← 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

 FPAAlphaDev

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

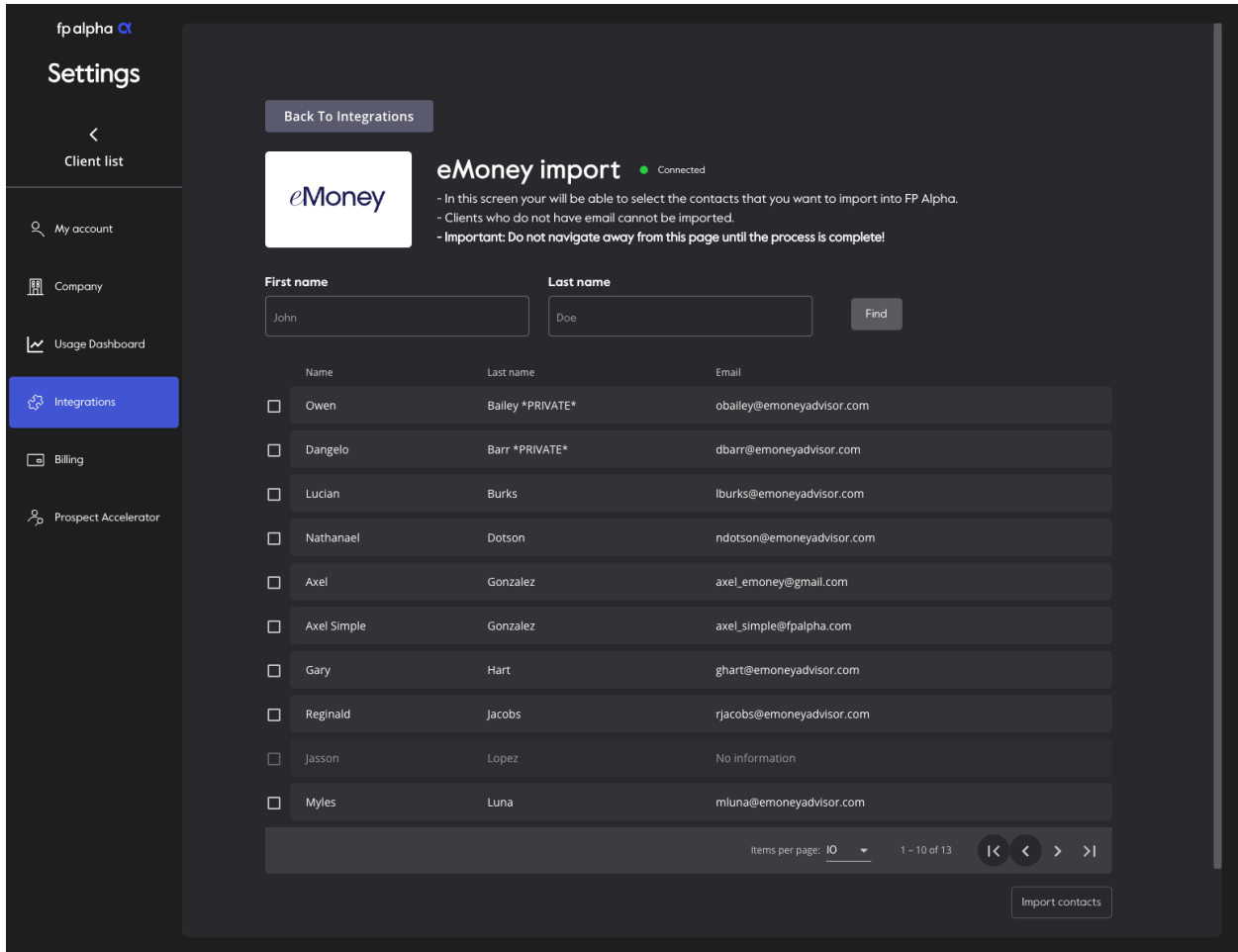
Permitir acceso

## 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**




The screenshot displays the 'eMoney import' interface within the FP Alpha settings. The sidebar on the left contains navigation links: Settings, Client list, My account, Company, Usage Dashboard, Integrations (highlighted), Billing, and Prospect Accelerator. The main content area features a 'Back To Integrations' button, the eMoney logo, and a 'Connected' status. Below this, there are search fields for 'First name' (containing 'John') and 'Last name' (containing 'Doe'), along with a 'Find' button. A table lists 13 contacts with checkboxes for selection. The table columns are Name, Last name, and Email. The contacts listed are:

Name	Last name	Email
<input type="checkbox"/> Owen	Bailey *PRIVATE*	obailey@emoneyadvisor.com
<input type="checkbox"/> Dangelo	Barr *PRIVATE*	dbarr@emoneyadvisor.com
<input type="checkbox"/> Lucian	Burks	lburks@emoneyadvisor.com
<input type="checkbox"/> Nathanael	Dotson	ndotson@emoneyadvisor.com
<input type="checkbox"/> Axel	Gonzalez	axel_emoney@gmail.com
<input type="checkbox"/> Axel Simple	Gonzalez	axel_simple@fpalpha.com
<input type="checkbox"/> Gary	Hart	ghart@emoneyadvisor.com
<input type="checkbox"/> Reginald	Jacobs	rjacobs@emoneyadvisor.com
<input type="checkbox"/> Jasson	Lopez	No information
<input type="checkbox"/> Myles	Luna	mluna@emoneyadvisor.com

At the bottom of the table, there is a pagination control showing 'Items per page: 10' and '1 - 10 of 13'. An 'Import contacts' button is located at the bottom right of the interface.

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

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Client list

---

My account

Company


Usage Dashboard

Integrations

Billing

Prospect Accelerator

[Back To Integrations](#)



### 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**

**Last name**

Find

	Name	Last name	Email
<input type="checkbox"/>	Axel	Gonzalez	axel_emoney@gmail.com
<input type="checkbox"/>	Axel Simple	Gonzalez	axel_simple@fpalpha.com

Items per page: 10
1 - 2 of 2

<
>

Import contacts

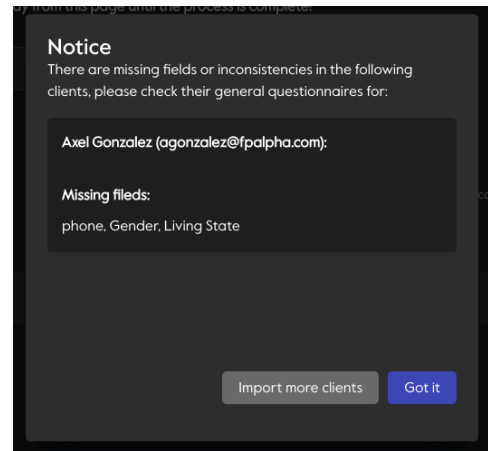
After you've finished selecting your contacts, click on 'Import Contacts'.

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

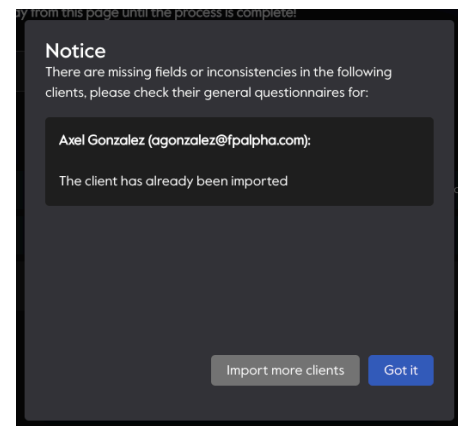
This pop-up will show when there's important information missing from the client.

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

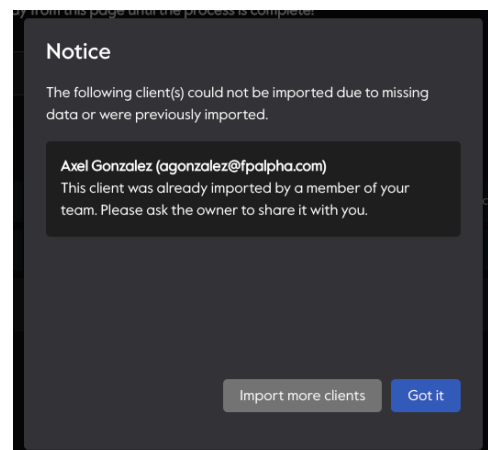
This popup will show when the client was already imported by you and some of their information was updated due to the re-import



### 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

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:

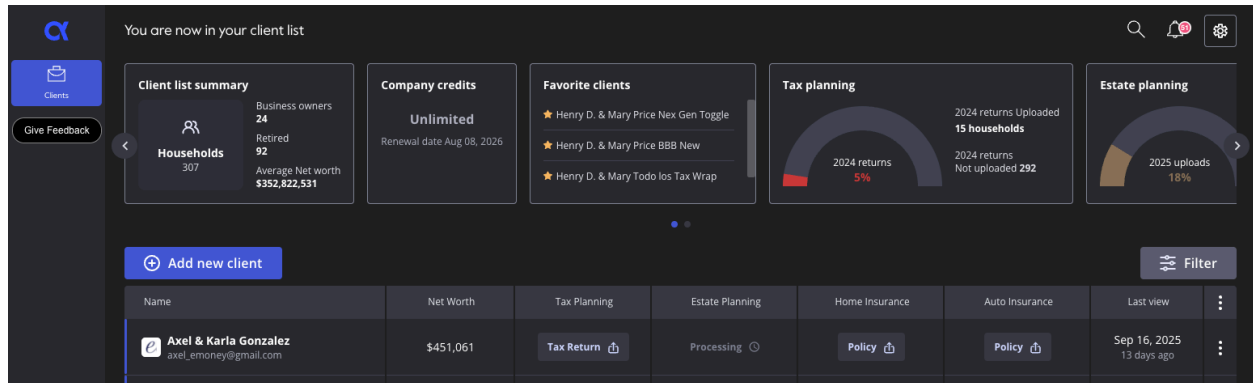
Axel Gonzalez (agonzalez@fpalpha.com):

**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

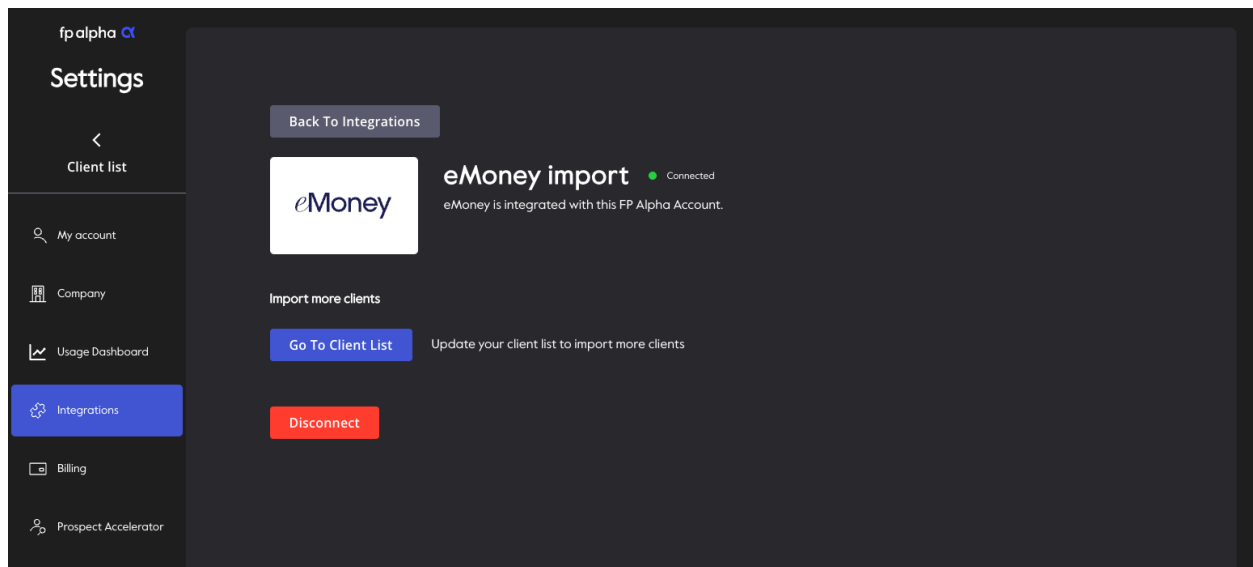
Once the contacts are imported you will be taken to your client list, and your imported contacts will appear with the icon of eMoney.



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
<b>Client</b>			
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			
<b>Co-Client (In Case Marital Status Is Not 'Single')</b>			
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
<b>Children</b>			
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?			
<b>Grandchildren</b>			
Name	Facts/Family & Friends/section Children	Yes	
Date of birth	Facts/Family & Friends/section Children/date of birth		
<b>Other beneficiaries</b>			
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
<b>Real Estate</b>			
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			
<b>Business</b>			
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			
<b>Retirement</b>			
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			
<b>Non Retirement</b>			
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/Beneiciary		
Contingent Beneficiaries			
<b>Life Insurance</b>			
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/Beneiciary		
Contingent Beneficiaries			
<b>College Saving</b>			
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/Beneiciary		
Contingent Beneficiaries			
<b>Loan/Liability</b>			
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			