

## PRECISEFP / SALESFORCE ENTERPRISE MAPPING TABLE

Important Information
When searching for Salesforce Contacts, make sure that your contact has a title of "CLIENT" and belongs to an Account. Co-clients are identified by a title of "COCLIENT".

Salesforce Section	PreciseFP Section	Comments	
Accounts	Household	<i>Export only</i>	
Salesforce Field	PreciseFP Field	Required	Comments
Account Name	<i>Client or Prospect Account Name</i>	Yes	
Account Type	<i>Customer - Channel or Prospect</i>	Yes	

Salesforce Section	PreciseFP Section	Comments	
Contacts	Client/Co-client	<i>Integrates records where title is CLIENT or COCLIENT</i>	
Salesforce Field	PreciseFP Field	Required	Comments
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	
Mobile Phone	Client Details/Contact Details/Mobile Phone		
Birth Date	Client Details/Personal Details/Birthdate		
Home Phone	Client Details/Contact Details/Home Phone		
Work Phone	Client Details/Contact Details/Work Phone		
Mailing Street	Client Details/Contact Details/Address		
Mailing City	Client Details/Contact Details/Address		
Mailing Postal Code	Client Details/Contact Details/Address		
Mailing State	Client Details/Contact Details/Address		
Mailing Country	Client Details/Contact Details/Address		
Contact Description	Client Details/Other Information/Comments		

Salesforce Section	PreciseFP Section	Comments	
Contacts	Children	<i>Integrates records where title is CHILD</i>	
Salesforce Field	PreciseFP Field	Required	Comments
Title	<i>CHILD</i>	Yes	
First Name	Family Members/Children/First Name	Yes	
Last Name	Family Members/Children/Last Name	Yes	
Email	Family Members/Children/Email	Yes	
Birth Date	Family Members/Children/Birthdate		
Mobile Phone	Family Members/Children/Phone		
Mailing Street	Family Members/Children/Address		
Mailing City	Family Members/Children/Address		
Mailing Postal Code	Family Members/Children/Address		
Mailing State	Family Members/Children/Address		
Mailing Country	Family Members/Children/Address		

Salesforce Section	PreciseFP Section	Comments	
Contacts	Other family members	<i>Integrates records where title is different than CLIENT, COCLIENT or CHILD</i>	
Salesforce Field	PreciseFP Field	Required	Comments
First Name	Family Members/Other Family Members/First Name	Yes	
Last Name	Family Members/Other Family Members/Last Name	Yes	
Email	Family Members/Other Family Members/Email	Yes	
Birth Date	Family Members/Other Family Members/Birthdate		
Mobile Phone	Family Members/Other Family Members/Phone		
Mailing Street	Family Members/Other Family Members/Address		
Mailing City	Family Members/Other Family Members/Address		
Mailing Postal Code	Family Members/Other Family Members/Address		
Mailing State	Family Members/Other Family Members/Address		
Mailing Country	Family Members/Other Family Members/Address		