

PRECISEFP / SALESFORCE FINANCIAL SERVICES CLOUD MAPPING TABLE

Important Information
 When searching for FSC Contacts, make sure that your contact is of type "Individual", is set as the "Primary Contact" of the account, and has a valid email address. Co-clients are identified by a role of "Spouse" and must not be a "Primary Contact".

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	
Individual Type	<i>group</i>	Yes	
Status	<i>active or prospect</i>	Yes	
Net worth	Cash Flow & Net Worth/Net Worth/Net Worth		
Record Type	<i>Household</i>	Yes	

Salesforce Section	PreciseFP Section		Comments
Accounts	Client Details		<i>Integrates records where the Type is "Individual", Clients are set as "Primary Contact" and Co-clients has Role "Spouse" and is not set as "Primary Contact"</i>
Salesforce Field	PreciseFP Field	Required	Comments
First Name	Client Details/Personal Details/First Name	Yes	
Middle Name	Client Details/Personal Details/Middle Initial		
Last Name	Client Details/Personal Details/Last Name	Yes	
Birth Date	Client Details/Personal Details/Birthdate		
Gender	Client Details/Personal Details/Gender		
Email	Client Details/Contact Details/Email	Yes	
Mobile Phone	Client Details/Contact Details/Mobile Phone		
Home Phone	Client Details/Contact Details/Home Phone		
Other 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		
Occupation	Employment&Income/Employment/Job Position		
Current Employer	Employment&Income/Employment/Employer		
Account Description	Client Details/Other Information/Comments		

Salesforce Section	PreciseFP Section		Comments
Contacts	Children		<i>Integrates records that have a Contact Relation with the Client or Co-client where the role is "Parent"</i>
Salesforce Field	PreciseFP Field	Required	Comments
Title	<i>See Comments</i>	Yes	
First Name	Family Members/Children/First Name	Yes	
Middle Name	Family Members/Children/Middle Initial		
Last Name	Family Members/Children/Last Name	Yes	
Birth Date	Family Members/Children/Birthdate		
Gender	Family Members/Children/Gender		
Email	Family Members/Children/Email		
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	Family Members		<i>Integrates records that have a Contact Relation with the Client or Co-client where the role is "GrandParent"</i>
Salesforce Field	PreciseFP Field	Required	Comments
Title	<i>See Comments</i>	Yes	
First Name	Family Members/Other Family Members/First Name	Yes	
Middle Name	Family Members/Other Family Members/Middle Initial		
Last Name	Family Members/Other Family Members/Last Name	Yes	
Birth Date	Family Members/Other Family Members/Birthdate		
Gender	Family Members/Other Family Members/Gender		
Email	Family Members/Other Family Members/Email		
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	

Salesforce Section	PreciseFP Section		Comments
Financial Accounts	Insurance		Integrates records where the Type is "Term Life", "Variable Life", or "Whole Life" and Record Type is "Insurance Policy"
Salesforce Field	PreciseFP Field	Required	Comments
Type	See comments	Yes	PreciseFP Insurance Type FSC Insurance Type
Record Type	Insurance Policy	Yes	Term Life Term Life
Owner	Insurance/Life Insurance/Insured	Yes	Variable Life Variable Life
Financial Account Name	Insurance/Life Insurance/Name	Yes	Whole Life Whole Life
Description	Insurance/Life Insurance/Provider		
Premium	Insurance/Life Insurance/Premium		
Insured Amount	Insurance/Life Insurance/Coverage amount		

Salesforce Section	PreciseFP Section		Comments
Financial Accounts	Bank Accounts		Integrates records where the Type is "Checking", or "Savings" and Record Type is "Bank Account"
Salesforce Field	PreciseFP Field	Required	Comments
Type	See comments	Yes	PreciseFP Bank Account Type FSC Bank Account Type
Record Type	Bank Account	Yes	Checking Checking
Owner	Assets/Bank Accounts/Owner	Yes	Savings Savings
Financial Account Name	Assets/Bank Accounts/Name	Yes	
Average Balance	Assets/Bank Accounts/Average Balance		
Description	Assets/Bank Accounts/Bank Name		

Salesforce Section	PreciseFP Section		Comments
Financial Accounts	Certificates of deposit		Integrates records where the Type is "CD" and Record Type is "Savings Account"
Salesforce Field	PreciseFP Field	Required	Comments
Type	CD	Yes	
Record Type	Savings Account	Yes	
Owner	Assets/Certificates of deposit/Owner	Yes	
Financial Account Name	Assets/Certificates of deposit/Name	Yes	
Balance	Assets/Certificates of deposit/Current Value		
Interest Rate	Assets/Certificates of deposit/Interest Rate		
Description	Assets/Certificates of deposit/Where Held?		

Salesforce Section	PreciseFP Section		Comments
Financial Accounts	Taxable Investment Accounts		Integrates records where the Type is "Brokerage" and Record Type is "Investment Account"
Salesforce Field	PreciseFP Field	Required	Comments
Type	Brokerage	Yes	
Record Type	Investment Account	Yes	
Owner	Assets/Taxable Investment Accounts/Owner	Yes	
Financial Account Name	Assets/Taxable Investment Accounts/Name	Yes	
Balance	Assets/Taxable Investment Accounts/Current Value		
Tax Status	Nonqualified	Yes	
Description	Assets/Taxable Investment Accounts/Where Held?		

Salesforce Section	PreciseFP Section		Comments
Financial Accounts	Annuities		Integrates records where the Type is "Fixed" or "Variable" and Record Type is "Savings Account"
Salesforce Field	PreciseFP Field	Required	Comments
Type	See comments	Yes	PreciseFP Annuity Type SF Annuity Type
Record Type	Savings Account	Yes	Fixed Fixed Annuity
Owner	Assets/Annuities/Owner	Yes	Variable Variable Annuity
Financial Account Name	Assets/Annuities/Name	Yes	

Salesforce Section	PreciseFP Section		Comments
Financial Accounts	Credit Cards		Integrates records where both the Type and Record Type are "Credit Card"
Salesforce Field	PreciseFP Field	Required	Comments
Type	Credit Card	Yes	
Record Type	Credit Card	Yes	
Owner	Liabilities/Credit Cards/Owner	Yes	

Interest Rate	Liabilities/Credit Cards/Interest Rate	
Financial Account Name	Liabilities/Credit Cards/Name	Yes
Balance	Liabilities/Credit Cards/Current Balance	
Minimum Payment	Liabilities/Credit Cards/Payment	
Payment Frequency	Monthly	

Salesforce Section	PreciseFP Section	Required	Comments
Financial Accounts	Mortgages		Integrates records where the Record Type is "Mortgage"
Salesforce Field	PreciseFP Field	Required	Comments
Record Type	Mortgage	Yes	
Owner	Liabilities/Mortgage/Owner	Yes	
Interest Rate	Liabilities/Mortgage/Interest Rate		
Financial Account Name	Liabilities/Mortgage/Name	Yes	
Balance	Liabilities/Mortgage/Current Balance		
Minimum Payment	Liabilities/Mortgage/Payment		
Payment Frequency	Monthly		
Date Opened	Liabilities/Mortgage/Start Date		
Loan End Date	Liabilities/Mortgage/End Date		

Salesforce Section	PreciseFP Section	Required	Comments
Financial Accounts	Loans		Integrates records where the Record Type is "Loan Account"
Salesforce Field	PreciseFP Field	Required	Comments
Record Type	Loan Account	Yes	
Owner	Liabilities/Loans/Owner	Yes	
Interest Rate	Liabilities/Loans/Interest Rate		
Financial Account Name	Liabilities/Loans/Name	Yes	
Balance	Liabilities/Loans/Current Balance		
Minimum Payment	Liabilities/Loans/Payment		
Payment Frequency	Monthly		
Date Opened	Liabilities/Loans/Start Date		
Loan End Date	Liabilities/Loans/End Date		

Salesforce Section	PreciseFP Section	Required	Comments
Assets and Liabilities	Personal Property		Integrates records where the Type is "Real Estate", "Collection", or "Automobile" and Record Type is "Asset"
Salesforce Field	PreciseFP Field	Required	Comments
Type	See comments	Yes	PreciseFP Property Type FSC Property Type
Record Type	Asset	Yes	Primary Residence Real Estate
Owner	Assets/Personal Property/Owner	Yes	Collectible Collection
Asset or Liability Name	Assets/Personal Property/Name	Yes	Vehicle Automobile
Amount	Assets/ Personal Property/Current Value		
Household	ACCOUNT	Yes	

Salesforce Section	PreciseFP Section	Required	Comments
Assets and Liabilities	Other Assets		Integrates records where the Type is "Other" and Record Type is "Asset"
Salesforce Field	PreciseFP Field	Required	Comments
Type	Other	Yes	
Record Type	Asset	Yes	
Owner	Assets/Personal Property/Owner	Yes	
Asset or Liability Name	Assets/Personal Property/Name	Yes	
Amount	Assets/Personal Property/Current Value		
Household	ACCOUNT	Yes	

Salesforce Section	PreciseFP Section	Required	Comments
Financial Goals	Goals		Exports records where the Type is "Retirement"
Salesforce Field	PreciseFP Field	Required	Comments
Type	Retirement	Yes	
Description	Goals/Retirement/I Would Prefer To	Yes	
Financial Goal Name	Goals/Retirement/Type	Yes	
Target Value	Goals/Retirement/Savings Needed		

Salesforce Section	PreciseFP Section	Required	Comments
Financial Goals	Travel		Exports records where the Type is "Other"
Salesforce Field	PreciseFP Field	Required	Comments
Type	Other	Yes	
Description	Goals/Travel/For		

Financial Goal Name	Goals/Travel/Description	Yes
Target Value	Goals/Travel/Annual Amount Needed	
Target Date	Goals/Travel/Start Year	

Salesforce Section	PreciseFP Section	Required	Comments
Financial Goals	Wedding		Exports records where the Type is "Other"
Salesforce Field	PreciseFP Field	Required	Comments
Type	Other	Yes	
Description	Goals/WeddingFor		
Financial Goal Name	Wedding	Yes	
Target Value	Goals/Wedding/Annual Amount Needed		
Target Date	Goals/Wedding/Year		

Salesforce Section	PreciseFP Section	Required	Comments
Financial Goals	Celebration		Exports records where the Type is "Other"
Salesforce Field	PreciseFP Field	Required	Comments
Type	Other	Yes	
Description	Goals/Celebration/For		
Financial Goal Name	Goals/Celebration/Description	Yes	
Target Value	Goals/Celebration/Amount Needed		
Target Date	Goals/Celebration/Year		

Salesforce Section	PreciseFP Section	Required	Comments
Financial Goals	College		Exports records where the Type is "Education"
Salesforce Field	PreciseFP Field	Required	Comments
Type	Education	Yes	
Description	Goals/College/For	Yes	
Financial Goal Name	College	Yes	
Target Value	Goals/College/Annual Amount Needed		
Target Date	Goals/College/Start Year		

Salesforce Section	PreciseFP Section	Required	Comments
Financial Goals	Private School		Exports records where the Type is "Education"
Salesforce Field	PreciseFP Field	Required	Comments
Type	Education	Yes	
Financial Goal Name	Goals/Private School/For	Yes	
Target Value	Goals/Private School/Annual Amount Needed		
Target Date	Goals/Private School/Start Year		

Salesforce Section	PreciseFP Section	Required	Comments
Financial Goals	New Business		Exports records where the Type is "New Business Acquisition"
Salesforce Field	PreciseFP Field	Required	Comments
Type	New Business Acquisition	Yes	
Description	Goals/New Business/For		
Financial Goal Name	Goals/New Business/Description	Yes	
Target Value	Goals/New Business/Amount Needed		
Target Date	Goals/New Business/Year		

Salesforce Section	PreciseFP Section	Required	Comments
Financial Goals	Goals		Exports records where the Type is "Home Purchase"
Salesforce Field	PreciseFP Field	Required	Comments
Type	Home Purchase	Yes	
Description	Goals/New Home/For		
Financial Goal Name	Goals/New Home/Description	Yes	
Target Value	Goals/New Home/Amount Needed		
Target Date	Goals/New Home/Year		

Salesforce Section	PreciseFP Section	Required	Comments
Financial Goals	Home Improvement		Exports records where the Type is "Investment"
Salesforce Field	PreciseFP Field	Required	Comments
Type	Investment	Yes	
Description	Goals/Home Improvement/For		
Financial Goal Name	Goals/Home Improvement/Description	Yes	
Target Value	Goals/Home Improvement/Amount Needed		
Target Date	Goals/Home Improvement/Year		

Salesforce Section	PreciseFP Section	Required	Comments
Financial Goals	Major Purchase		Exports records where the Type is "Large Purchase"
Salesforce Field	PreciseFP Field	Required	Comments
Type	Large Purchase	Yes	
Description	Goals/Major Purchase/For		
Financial Goal Name	Goals/Major Purchase/Description	Yes	
Target Value	Goals/Major Purchase/Amount Needed		
Target Date	Goals/Major Purchase/Year		

Salesforce Section	PreciseFP Section	Required	Comments
Financial Goals	Provide Care		Exports records where the Type is "Other"
Salesforce Field	PreciseFP Field	Required	Comments
Type	Other	Yes	
Description	Goals/Provide Care/For		
Financial Goal Name	Goals/Provide Care/Description	Yes	
Target Value	Goals/Provide Care/Annual Amount Needed		
Target Date	Goals/Provide Care/Year		

Salesforce Section	PreciseFP Section	Required	Comments
Financial Goals	Goals		Exports records where the Type is "Other"
Salesforce Field	PreciseFP Field	Required	Comments
Type	Other	Yes	
Description	Goals/Gift or Donation/For		
Financial Goal Name	Goals/Gift or Donation/Description	Yes	
Target Value	Goals/Gift or Donation/Annual Amount Needed		
Target Date	Goals/Gift or Donation/Year		

Salesforce Section	PreciseFP Section	Required	Comments
Financial Goals	Leave Bequest		Exports records where the Type is "Other"
Salesforce Field	PreciseFP Field	Required	Comments
Type	Other	Yes	
Description	Goals/Leave Bequest/For		
Financial Goal Name	Goals/Leave Bequest/Description	Yes	
Target Value	Goals/Leave Bequest/Amount Needed		

Salesforce Section	PreciseFP Section	Required	Comments
Financial Goals	Other Goal		Exports records where the Type is "Other"
Salesforce Field	PreciseFP Field	Required	Comments
Type	Other	Yes	
Description	Goals/Other Goal/For		
Financial Goal Name	Goals/Other Goal/Description	Yes	
Target Value	Goals/Other Goal/Annual Amount Needed		
Target Date	Goals/Other Goal/Year		