

PRECISEFP / SALESFORCE XLR8 MAPPING TABLE

Important Information
 When searching for XLR8 Contacts, make sure that your contact is set as the "Primary Contact" of the account and has a valid email address.
 Co-clients are identified by a relationship of "Spouse", "Partner", "Husband", or "Wife". Co-clients must be a "Core Contact" of the account and must not be a "Primary Contact".

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

Salesforce Section	PreciseFP Section		Comments
Contacts	Client Details		Integrates records where the Client are the "Primary Contact" and the Co-client are not the "Primary Contact", are a "Core Contact" and have a relationship of "Spouse", "Partner", "Husband", or "Wife"
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		
Primary Street	Client Details/Contact Details/Address		
Primary City	Client Details/Contact Details/Address		
Primary Postal Code	Client Details/Contact Details/Address		
Primary State	Client Details/Contact Details/Address		
Primary Country	Client Details/Contact Details/Address		
Drivers Licence	Client Details/Driver's License/Number		
License State	Client Details/Driver's License/Jurisdiction		
Occupation	Employment&Income/Employment/Job Position		
Current Employer	Employment&Income/Employment/Employer		
Account Description	Client Details/Other Information/Comments		
Relation to Entity	<i>Spouse</i>		

Salesforce Section	PreciseFP Section		Comments
Contacts	Children		<i>Integrates records where the Relation to Entity is "Son" or "Daughter"</i>
Salesforce Field	PreciseFP Field	Required	Comments
Relation to Entity	Family Members/Children/Gender	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		
Primary Street	Family Members/Children/Address		
Primary City	Family Members/Children/Address		
Primary Postal Code	Family Members/Children/Address		
Primary State	Family Members/Children/Address		
Primary Country	Family Members/Children/Address		

Salesforce Section	PreciseFP Section		Comments
Contacts	Other Family Members		<i>Integrates records where the Relation to Entity is "Family"</i>
Salesforce Field	PreciseFP Field	Required	Comments
Relation to Entity	<i>Family</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		
Primary Street	Family Members/Other Family Members/Address		

Primary City	Family Members/Other Family Members/Address	
Primary Postal Code	Family Members/Other Family Members/Address	
Primary State	Family Members/Other Family Members/Address	
Primary Country	Family Members/Other Family Members/Address	

Salesforce Section	PreciseFP Section		Comments
Individual Insurance	Life Insurance		Integrates records where the Record Type is "Life" and Policy Type is "Term", "Whole Life", "Universal Life", or "Variable Universal Life"
Salesforce Field	PreciseFP Field	Required	Comments
Policy Type	See comments	Yes	PreciseFP Insurance Type XLR8 Policy Type
Record Type	Life	Yes	Term Life Term
Owner	Insurance/ Life Insurance/Insured	Yes	Whole Life Whole Life
Insured Individual	Insurance/ Life Insurance/Insured		Universal Life Universal Life
Policy Number or Name	Insurance/ Life Insurance/Name	Yes	Variable Universal Life Variable Universal Life
Primary Beneficiary	Insurance/ Life Insurance/Primary Beneficiary		
Secondary Beneficiary	Insurance/ Life Insurance/Secondary Beneficiary		
Annualized Premium	Insurance/ Life Insurance/Premium		
Basic Death Benefit	Insurance/ Life Insurance/Coverage Amount		
Surrender Value	Insurance/ Life Insurance/Cash Value		

Salesforce Section	PreciseFP Section		Comments
Individual Insurance	Health		Integrates records where the Record Type is "Health"
Salesforce Field	PreciseFP Field	Required	Comments
Record Type	Health	Yes	
Owner	Insurance/Health Insurance/Insured	Yes	
Insured Individual	Insurance/Health Insurance/Insured	Yes	
Policy Number or Name	Insurance/Health Insurance/Name	Yes	
Annualized Premium	Insurance/Health Insurance/Premium		

Salesforce Section	PreciseFP Section		Comments
Individual Insurance	Disability		Integrates records where the Record Type is "Disability"
Salesforce Field	PreciseFP Field	Required	Comments
Record Type	Disability	Yes	
Owner	Insurance/Disability Insurance/Insured	Yes	
Insured Individual	Insurance/Disability Insurance/Insured	Yes	
Policy Number or Name	Insurance/Disability Insurance/Name	Yes	
Annualized Premium	Insurance/Disability Insurance/Premium		
Maximum Benefit	Insurance/Disability Insurance/Coverage Amount		

Salesforce Section	PreciseFP Section		Comments
Individual Insurance	Long Term Care Insurance		Integrates records where the Record Type is "Long Term Care"
Salesforce Field	PreciseFP Field	Required	Comments
Record Type	Long Term Care	Yes	
Owner	Insurance/Long Term Care Insurance/Insured	Yes	
Insured Individual	Insurance/Long Term Care Insurance/Insured	Yes	
Policy Number or Name	Insurance/Long Term Care Insurance/Name	Yes	
Annualized Premium	Insurance/Long Term Care Insurance/Premium		

Salesforce Section	PreciseFP Section		Comments
Individual Insurance	Umbrella Insurance		Integrates records where the Record Type is "Umbrella"
Salesforce Field	PreciseFP Field	Required	Comments
Record Type	Umbrella	Yes	
Owner	Insurance/Umbrella Insurance/Insured	Yes	
Insured Individual	Insurance/Umbrella Insurance/Insured	Yes	
Policy Number or Name	Insurance/Umbrella Insurance/Name	Yes	
Annualized Premium	Insurance/Umbrella Insurance/Premium		

Salesforce Section	PreciseFP Section		Comments
Individual Insurance	Auto Insurance		Integrates records where the Record Type is "Property & Casualty" and the Policy Type is "Automobile"
Salesforce Field	PreciseFP Field	Required	Comments
Record Type	Property & Casualty	Yes	
Policy Owner	Insurance/Auto Insurance/Insured	Yes	
Policy Number or Name	Insurance/Auto Insurance/Name	Yes	
Annualized Premium	Insurance/Auto Insurance/Premium		
Policy Type	Automobile		

Salesforce Section	PreciseFP Section		Comments
Individual Insurance	Homeowner's Insurance		Integrates records where the Record Type is "Property & Casualty" and the Policy Type is "Homeowners"
Salesforce Field	PreciseFP Field	Required	Comments
Record Type	Property & Casualty	Yes	
Policy Owner	Insurance/Homeowner's Insurance/Insured	Yes	
Policy Number or Name	Insurance/Homeowner's Insurance/Name	Yes	
Annualized Premium	Insurance/Homeowner's Insurance/Premium		
Policy Type	Homeowners		

Salesforce Section	PreciseFP Section		Comments
Assets & Liabilities	Retirement Plans		Integrates records where the Record Type is "Retirement Asset" and the Category is "401k"
Salesforce Field	PreciseFP Field	Required	Comments
Record Type	Retirement Asset	Yes	
Category	401k	Yes	
Primary Owner	Retirement Plans/401k/Owner	Yes	
Asset / Account Number	Retirement Plans/401k/Name	Yes	
Primary Beneficiary	Retirement Plans/401k/Primary Beneficiary		
Secondary Beneficiary	Retirement Plans/401k/Secondary Beneficiary		
Value/Balance	Retirement Plans/401k/Account Value		

Salesforce Section	PreciseFP Section		Comments
Assets & Liabilities	Retirement Plans		Integrates records where the Record Type is "Retirement Asset" and the Category is "Roth Conversion"
Salesforce Field	PreciseFP Field	Required	Comments
Record Type	Retirement Asset	Yes	
Category	Roth Conversion	Yes	
Primary Owner	Retirement Plans/Roth 401k/Owner	Yes	
Asset / Account Number	Retirement Plans/Roth 401k/Name	Yes	
Primary Beneficiary	Retirement Plans/Roth 401k/Primary Beneficiary		
Secondary Beneficiary	Retirement Plans/Roth 401k/Secondary Beneficiary		
Value/Balance	Retirement Plans/Roth 401k/Account Value		

Salesforce Section	PreciseFP Section		Comments
Assets & Liabilities	IRA		Integrates records where the Record Type is "Retirement Asset" and the Category is "IRA"
Salesforce Field	PreciseFP Field	Required	Comments
Record Type	Retirement Asset	Yes	
Category	IRA	Yes	
Primary Owner	Retirement Plans/IRA/Owner	Yes	
Asset / Account Number	Retirement Plans/IRA/Name	Yes	
Primary Beneficiary	Retirement Plans/IRA/Primary Beneficiary		
Secondary Beneficiary	Retirement Plans/IRA/Secondary Beneficiary		
Value/Balance	Retirement Plans/IRA/Account Value		

Salesforce Section	PreciseFP Section		Comments
Assets & Liabilities	Roth IRA		Integrates records where the Record Type is "Retirement Asset" and the Category is "Roth IRA"
Salesforce Field	PreciseFP Field	Required	Comments
Record Type	Retirement Asset	Yes	
Category	Roth IRA	Yes	
Primary Owner	Retirement Plans/Roth IRA/Owner	Yes	
Asset / Account Number	Retirement Plans/Roth IRA/Name	Yes	
Primary Beneficiary	Retirement Plans/Roth IRA/Primary Beneficiary		
Secondary Beneficiary	Retirement Plans/Roth IRA/Secondary Beneficiary		
Value/Balance	Retirement Plans/Roth IRA/Account Value		

Salesforce Section	PreciseFP Section		Comments
Assets & Liabilities	SEP IRA		Integrates records where the Record Type is "Retirement Asset" and the Category is "SEP-IRA"
Salesforce Field	PreciseFP Field	Required	Comments
Record Type	Retirement Asset	Yes	
Category	SEP-IRA	Yes	
Primary Owner	Retirement Plans/SEP IRA/Owner	Yes	
Asset / Account Number	Retirement Plans/Roth IRA/Name	Yes	
Primary Beneficiary	Retirement Plans/Roth IRA/Primary Beneficiary		
Secondary Beneficiary	Retirement Plans/Roth IRA/Secondary Beneficiary		
Value/Balance	Retirement Plans/Roth IRA/Account Value		

Primary Owner	Liabilities/Mortgages/Owner	Yes
Interest Rate	Liabilities/Mortgages/Interest Rate	
Asset / Account Number	Liabilities/Mortgages/Name	Yes
Value / Balance	Liabilities/Mortgages/Current Balance	
Initial Loan Amount	Liabilities/Mortgages/Original Balance	
Acquired / Opened Date	Liabilities/Mortgages/Start Date	
Maturity Date	Liabilities/Mortgages/End Date	
Rate Structure	Liabilities/Mortgages/Type	

Salesforce Section	PreciseFP Section		Comments
Assets and Liabilities	Loans		Integrates records where the Record Type is "Liability" and the category is "Car Loan", "Home Equity Line of Credit", "Personal Notes/Loans", or "Education Loan"
Salesforce Field	PreciseFP Field	Required	Comments
Category	See comments	Yes	PreciseFP Loan Type XLR8 Category
Record Type	Liability	Yes	Auto Car Loan
Primary Owner	Liabilities/Loans/Owner	Yes	School Loan Education Loan
Interest Rate	Liabilities/Loans/Interest Rate		Credit Line Home Equity Line of Credit
Asset / Account Number	Liabilities/Loans/Name	Yes	Personal Note Personal Notes/Loans
Value / Balance	Liabilities/Loans/Current Balance		
Initial Loan Amount	Liabilities/Loans/Original Balance		
Acquired / Opened Date	Liabilities/Loans/Start Date		
Maturity Date	Liabilities/Loans/End Date		