

PRECISEFP / ADVICEPAY MAPPING TABLE

Important Information
 When searching for AdvicePay clients, make sure that your client has a valid email address.

AdvicePay Section	PreciseFP Section		Comments
Clients	Client Details		<i>Integrates clients only. PreciseFP co-clients will be skipped.</i>
AdvicePay Field	PreciseFP Field	Required	Comments
First Name	Client Details/Personal Details/First Name	Yes	<i>Once the email address is verified in AdvicePay, the integration will not longer update it when exporting from PreciseFP.</i>
Last Name	Client Details/Personal Details/Last Name	Yes	
Email Address	Client Details/Contact Details/Email	Yes	

Other Information
 The integration allows you to import/export custom "Client Profile" fields. If you created custom fields in your AdvicePay account, these will be available in the integration mapper. Invoice information is also available to be imported from AdvicePay into PreciseFP. Visit the integration mapper, add the "Invoices" object and map the information to your PreciseFP dataset.