

## PRECISEFP / DOCUPACE MAPPING TABLE

### Important Information

The integration requires your API Key to be added and stored in Docupace under your account user access settings. PreciseFP Clients will be exported as 'Prospect' type unless they have SSN on their record and a custom mapping of SSN exists in the Docupace integration mapper. First name, last name, and TIN/SSN will not be updated when exporting to Docupace. These fields are only exported once and must be manually updated on any subsequent exports.

Docupace Section	PreciseFP Section	Comments
Client Folder	Client Details	<i>Integrates client/co-client details</i>
Docupace Field	PreciseFP Field	RequiredComments
First Name	Client Details/Personal Details/First Name	Yes
Middle Name	Client Details/Personal Details/Middle Name	
Last Name	Client Details/Personal Details/Last Name	Yes
Gender	Client Details/Personal Details/Gender	
DOB	Client Details/Personal Details/Birthdate	
Legal Address	Client Details/Contact Details/Address	
Legal City	Client Details/Contact Details/Address	
Legal Zip	Client Details/Contact Details/Address	
Legal State	Client Details/Contact Details/Address	
Legal Country	Client Details/Contact Details/Address	
Work Phone	Client Details/Contact Details/Work Phone	
Mobile Phone	Client Details/Contact Details/Mobile Phone	
Home Phone	Client Details/Contact Details/Home Phone	
Email	Client Details/Contact Details/Email	Yes
Government ID Type	<i>Driver's Licence</i>	
Government ID	Client Details/Driver's License/Number	
ID Issue Date	Client Details/Driver's License/Issue Date	
ID Expiration Date	Client Details/Driver's License/Expire Date	
Employer/Company Name	Employment & Income/Employment/Employer	
Client Occupation	Employment & Income/Employment/Job Position	
Years Employed	Employment & Income/Employment/No. of Years Working Here	
Employment Income	Employment & Income/Annual Income/Employment Income	<i>Export only</i>
Company Mailing Address	Employment & Income/Employment/Address	
Company Mailing City	Employment & Income/Employment/Address	
Company Mailing Zip	Employment & Income/Employment/Address	
Company Mailing State	Employment & Income/Employment/Address	
Company Mailing Country	Employment & Income/Employment/Address	