WE Insights for Salesforce

Installation Guide

v9.18: April 2024

The WE Insights for Salesforce product empowers Salesforce users to analyze and score their Leads, Contacts, and Person Accounts through the WealthEngine API. This guide is designed for Salesforce administrators to learn how to install the WE Insights for Salesforce package.

Please note that this information is confidential and proprietary and cannot be shared without prior consent from WealthEngine.

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Introduction to WE Insights for Salesforce

The WealthEngine (WE) Salesforce Connector creates a robust connection between the WealthEngine Platform and Salesforce, offering accessible and extensive wealth insights. By utilizing the WE Salesforce Connector, users of Salesforce can directly access over 50 wealth scores and ratings from WealthEngine. This feature provides the necessary tools to enhance marketing, business development, and fundraising efforts by utilizing new insights and increasing productivity.

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Big Picture

1. Connect with your WE admin to understand which features you have contracted for
2. Install and configure WE Insights for Salesforce app using this guide
3. WE Admin: Ensure WE users are correctly setup
4. Connect SF to WE
5. Test the app

Powerful Capabilities

The WE Salesforce Connector offers a variety of features that enhance wealth insights and productivity within Salesforce. These include:

- One Click: Add wealth intelligence to existing Lead, Contact or Person account records
- Bulk Append: Get wealth data on an entire list with a click of a button within Salesforce
- Reporting: Easily report on WE data and your data using standard SF reporting and analytics tools
- Prospecting: Direct integration with WE's prospecting tool
- Search: The ability to send new leads directly to Salesforce from WE Search
- Model Scores: Score any Salesforce record against a model in your WealthEngine account
- Auto-Append: Option to automatically append wealth data upon insert of new records
- Report Screening: Screen any reports that exists within the Salesforce, one time or on a scheduled basis
- List View Screening: Screen single or multiple records from Salesforce Contact and Lead List views, without going into a record.
- Available Credits: Visibility to remaining credit amount within the Salesforce app for Admins

- *SHIELD Optimized: This version of WE Insights for Salesforce is automatically configured to work with SHIELD if you Salesforce Org is configured with this security protocol

- Customizable:

  - Ability to customize viewable fields and page layout per your needs
  - Choose which fields are used for searching against WealthEngine
  - User based permissions and usage metrics

WE_Insights for Salesforce Installation Requirements:

- Be an administrator for an active Salesforce CRM environment
- To establish the connection between two systems, the user's WealthEngine username must match his or her email address in Salesforce
- An active WealthEngine Platform account
- A subscription to WealthEngine's Salesforce Connector
- The WE Insights for Salesforce is compatible with: Enterprise, Unlimited, Non-Profit Success Pack and Developer editions.
- WE Insights for Salesforce is not compatible with: Contact Manager, Professional, or Group editions.
- Contact your account representative for any questions regarding your WealthEngine subscription

Step 1: Install the App using the Link Below

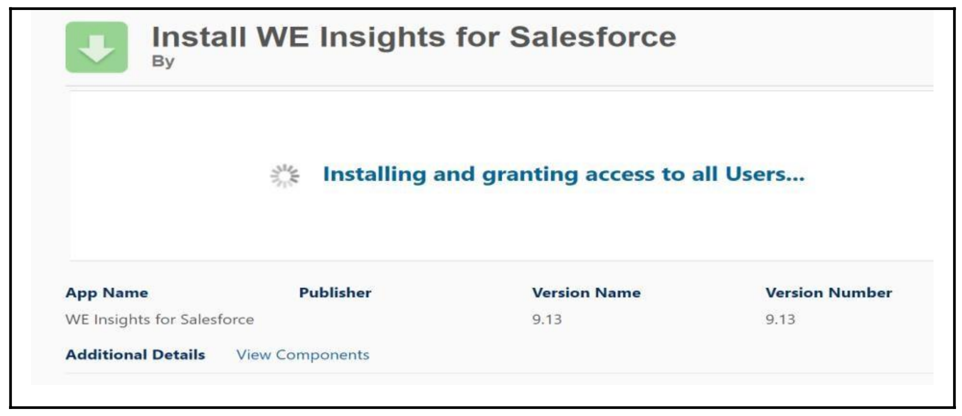
Sandbox: https://test.salesforce.com/packaging/installPackage.apexp?p0=04t6S000001Qcea
Production: https://login.salesforce.com/packaging/installPackage.apexp?p0=04t6S000001Qcea

Note: After installation, the license count is initially set to 1 by default. However, based on your plan, it is necessary to re-provision the number of seats. To facilitate this, kindly contact customer support and request an update to the number of seats in accordance with your plan. <customerservice@wealthengine.com>

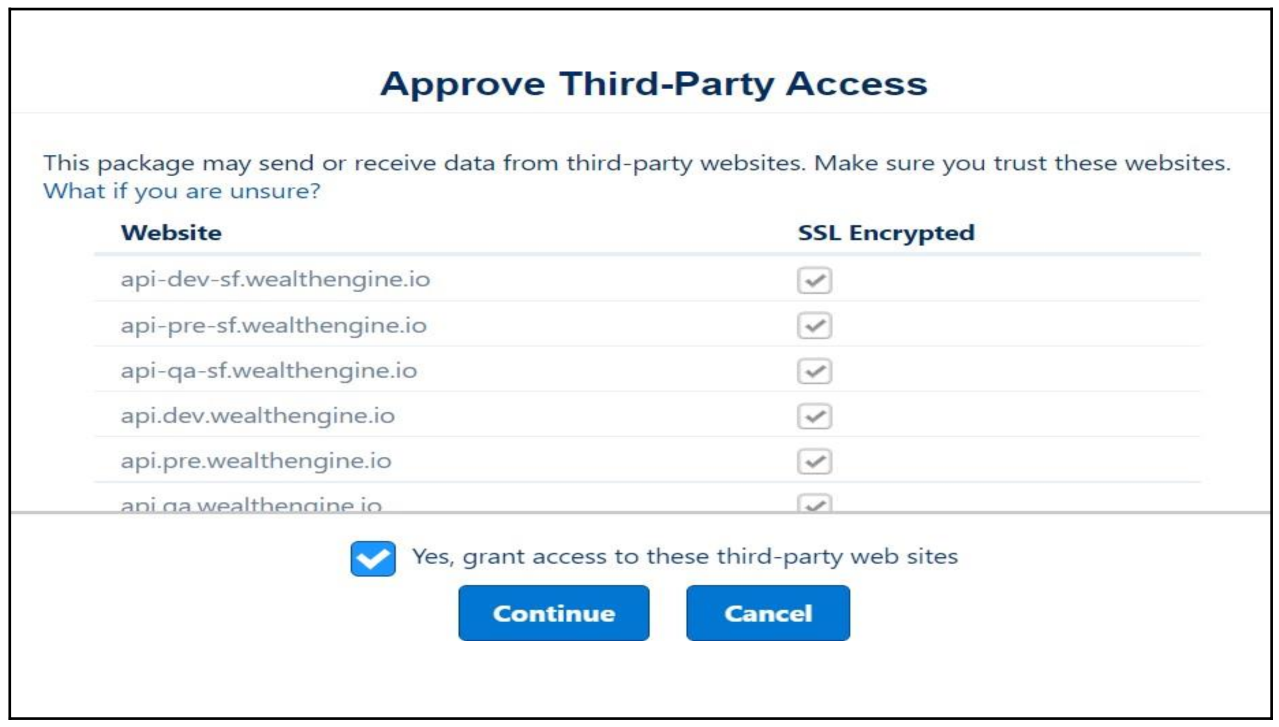
Step 2: Choose Security Level

- Option 1: Grant access to admins only
- Option 2: Grant access to all users - recommended
- Option 3: Select security settings

Note: As a general rule, try to grant access to a greater number of profiles, all of which may need access to the WE app at some point in the future, since adjusting permissions later can be quite difficult. Our app uses licensing, so access is ultimately controlled by the user.



Step 3: Approve Third-Party Access



Note: In order for the WealthEngine app to interact with Salesforce, you will need to approve us as a third-party site that is able to send and receive information from Salesforce.

Installation Complete

You will be brought to the Install Complete page after the WE Insights for Salesforce Package has completed installation. Please note, that you may experience a slight delay of a minute or two as the package is installed.

Lightning Setup: Configure Page Layouts for WE Data:

The next step is to edit the Salesforce pages to display the WealthEngine data. The WealthEngine data can be added to the page layouts of the Lead, Contact or Person Account pages. Use the steps below to configure the various pages you want the WealthEngine data to be displayed. You will need to repeat the steps for each page layout and object that you wish to see the WealthEngine data.

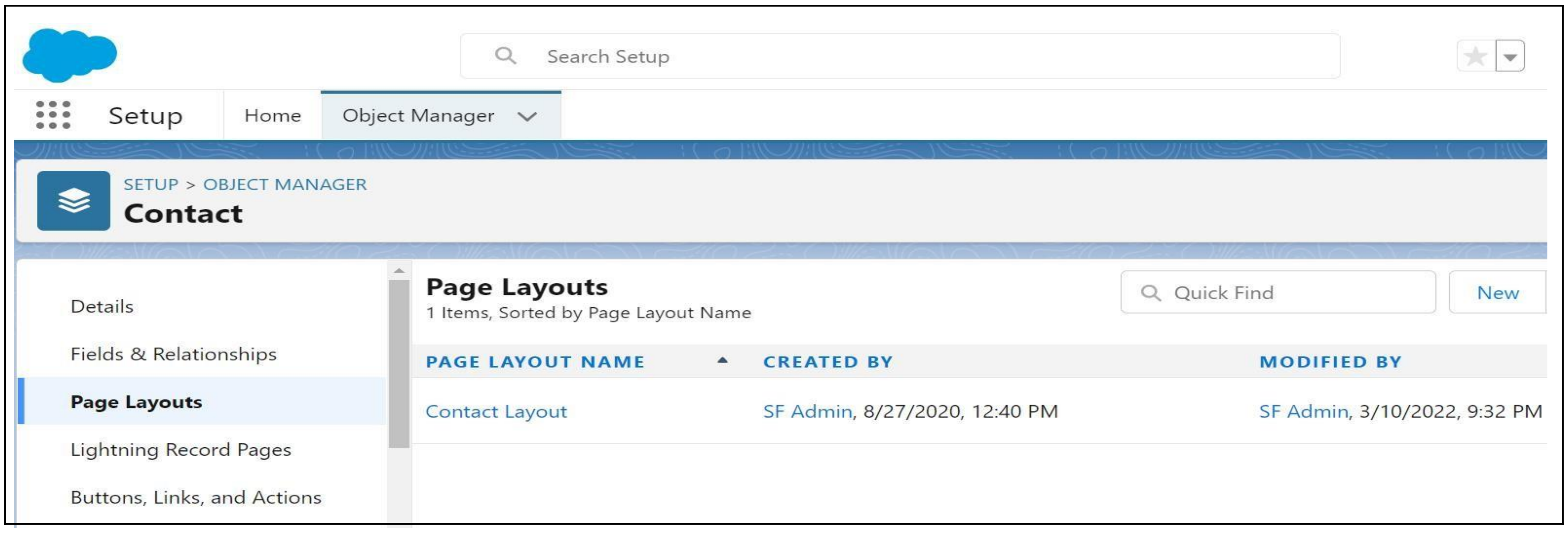
Whether you are using Lightning or Classic, Contacts or Leads, you have 2 options for configuring the WealthEngine data and functionality on your page layouts.

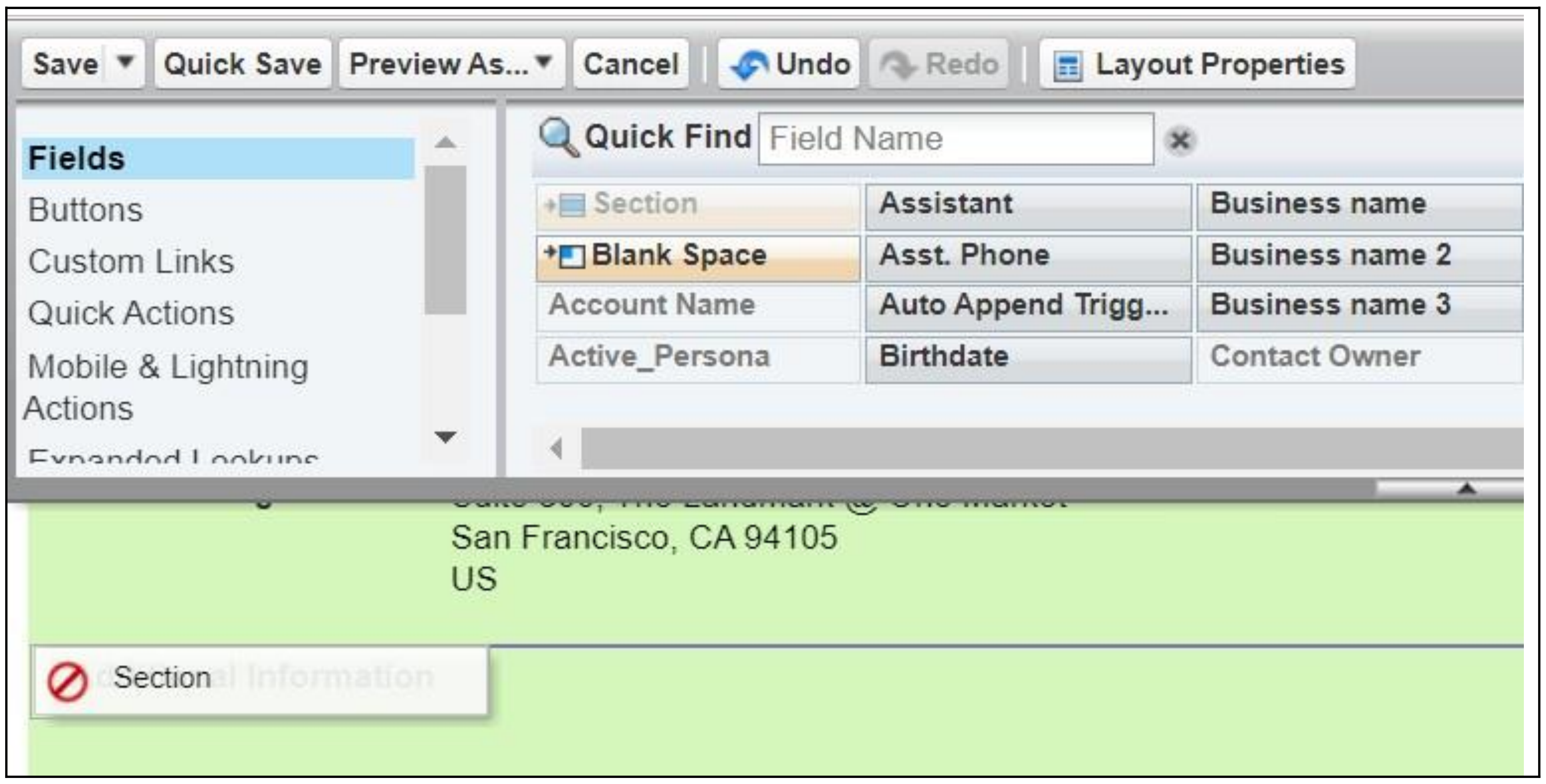
1. Related List and Buttons: This method uses standard Salesforce functionality, related list and buttons to allow the user to see and interact with WealthEngine. The benefits are, it uses standard Salesforce functionality and allows you to choose which WE fields to display.

2. Visualforce Page: This setup method removes the customization options but gives you the pre-set fields recommended by WealthEngine and all functionality easily in one component. This is the recommended approach for most clients.

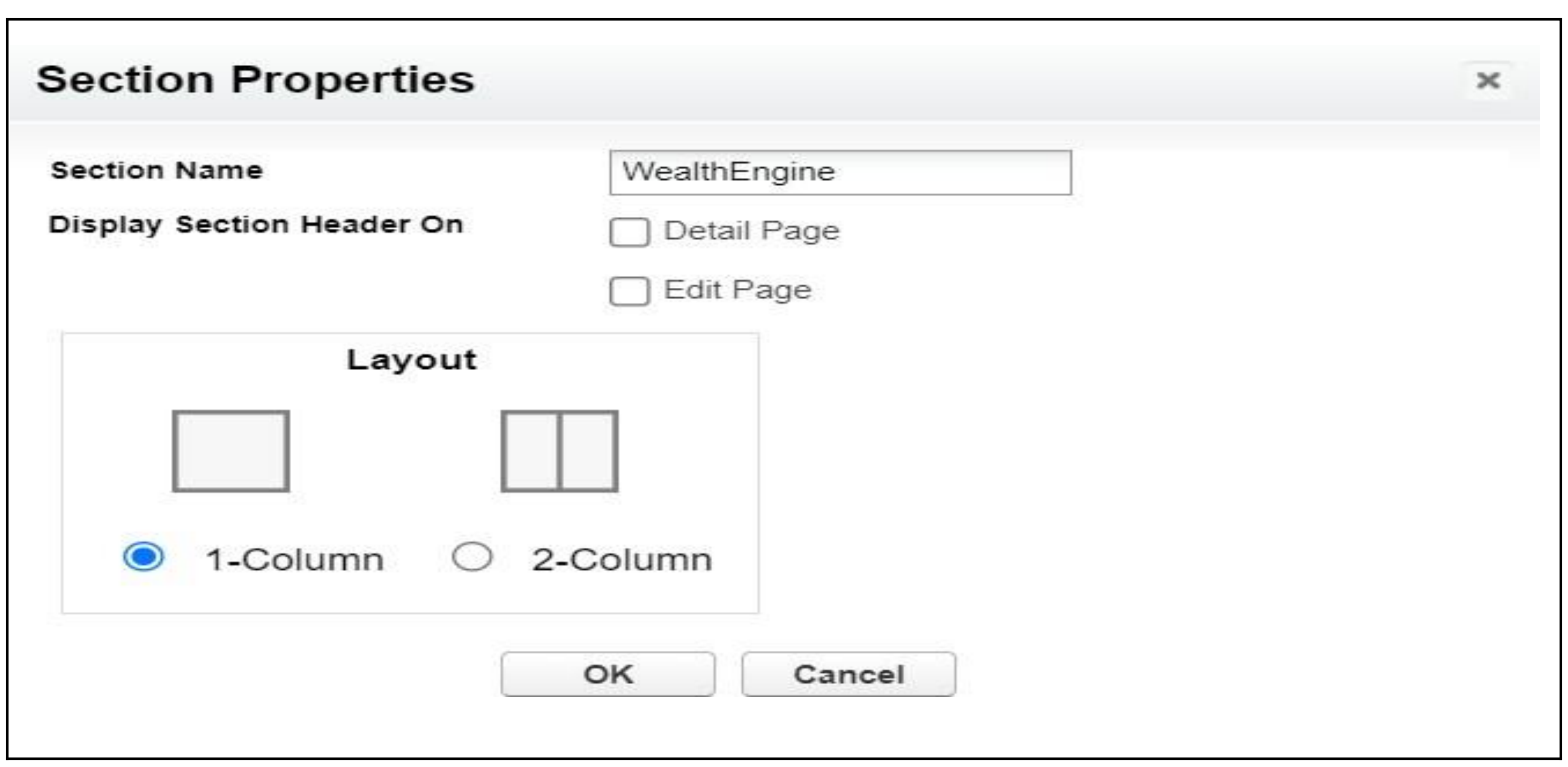
Option 1: Related List

1. Setup > Object Manager
2. Select Contact or Lead or Person Account
3. Choose Page Layouts

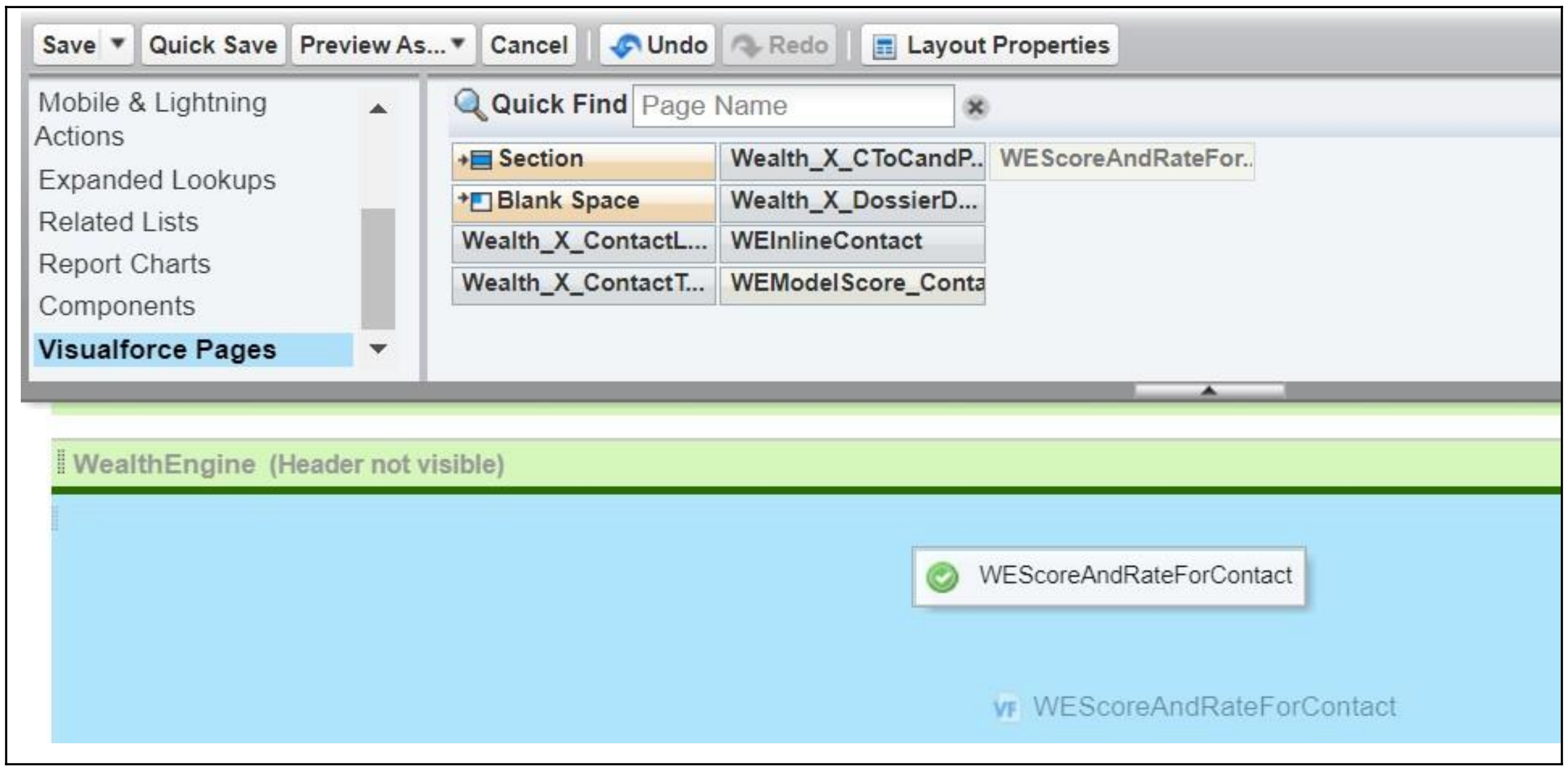


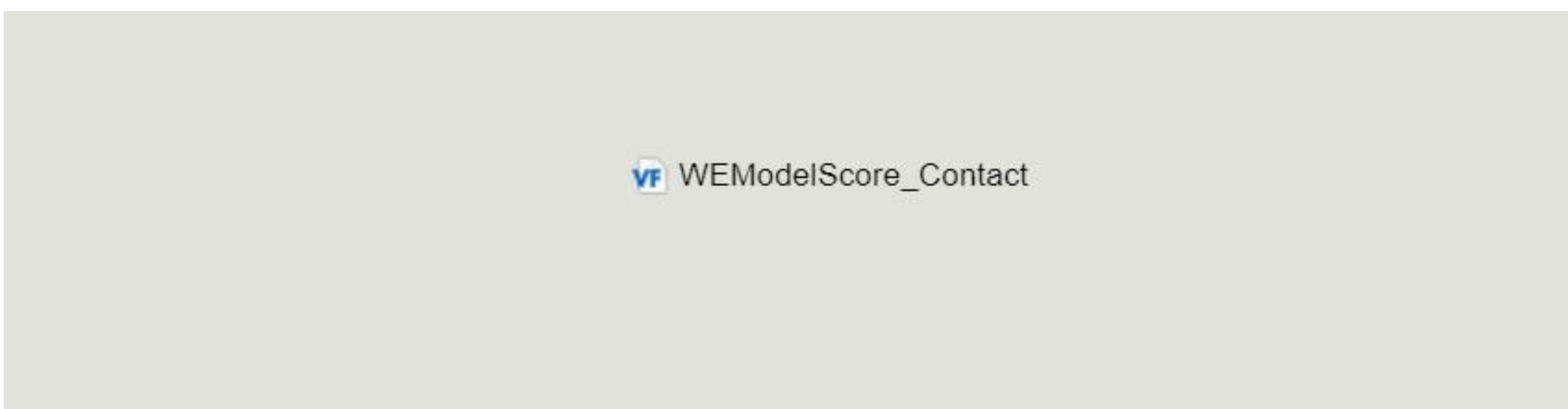


4. Click on the Contact page layout to include the WealthEngine app.
5. Drag a Section from the Page Layout frame and drop it to the Page Detail area
6. In the Section Properties window> name the section> WealthEngine.
7. Uncheck the Edit Page and Detail Page options in Display Section Header On.
8. Choose the 1-Column Layout and click on OK.

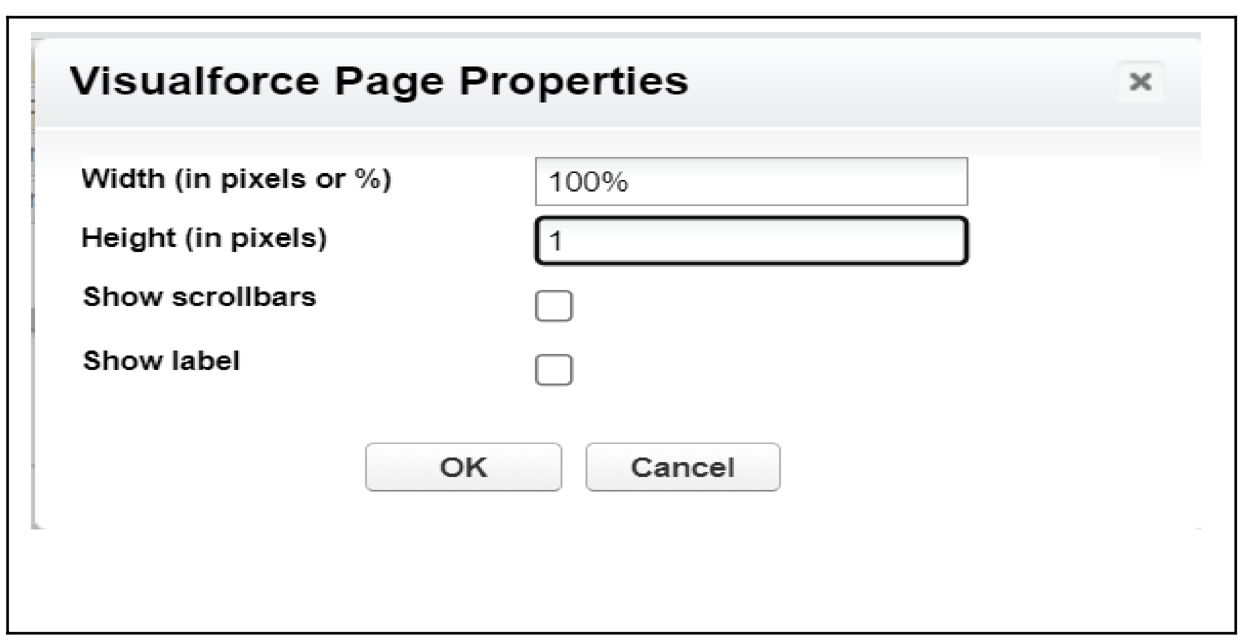


9. In the Contact Layout frame, select Visualforce Pages and drag and drop the WEScoreAndRateForContact and WEModelScore_ Contact and drop them in the new WealthEngine section you created in the previous step

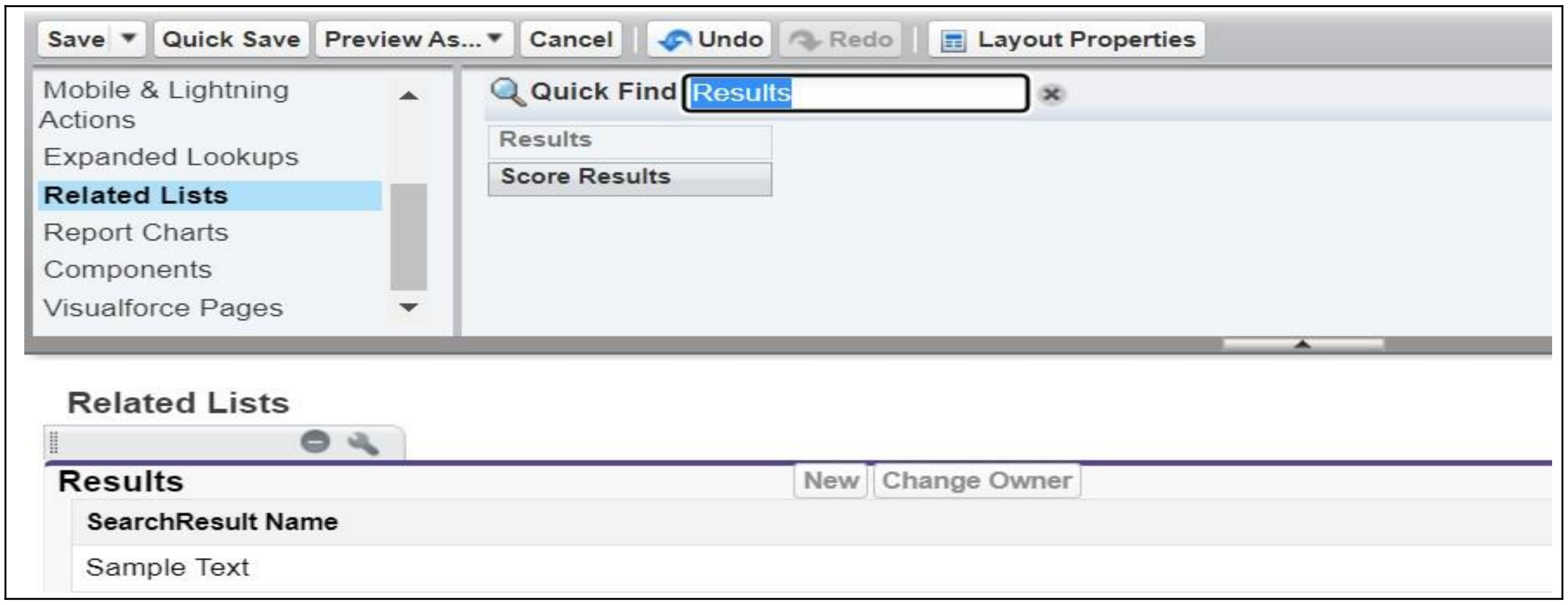




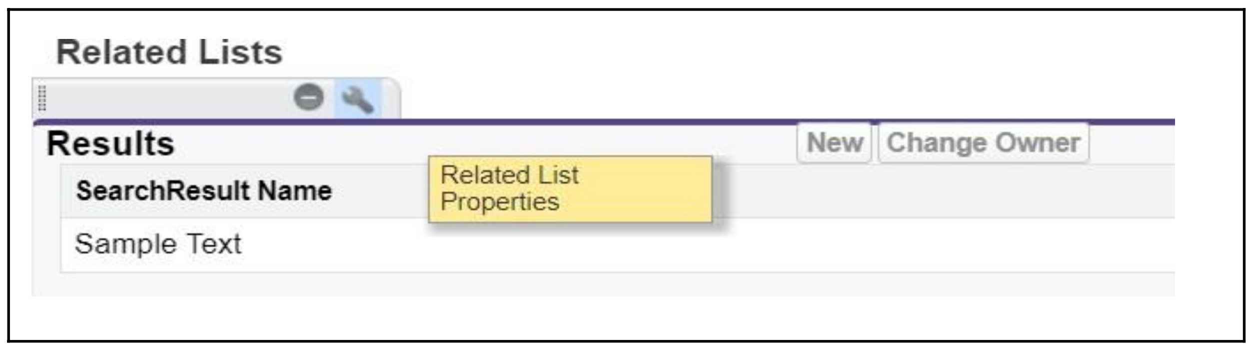
10. Click on the icon in the top right corner of the Visualforce page to change its properties. Set the height to 1 pixel and click OK.

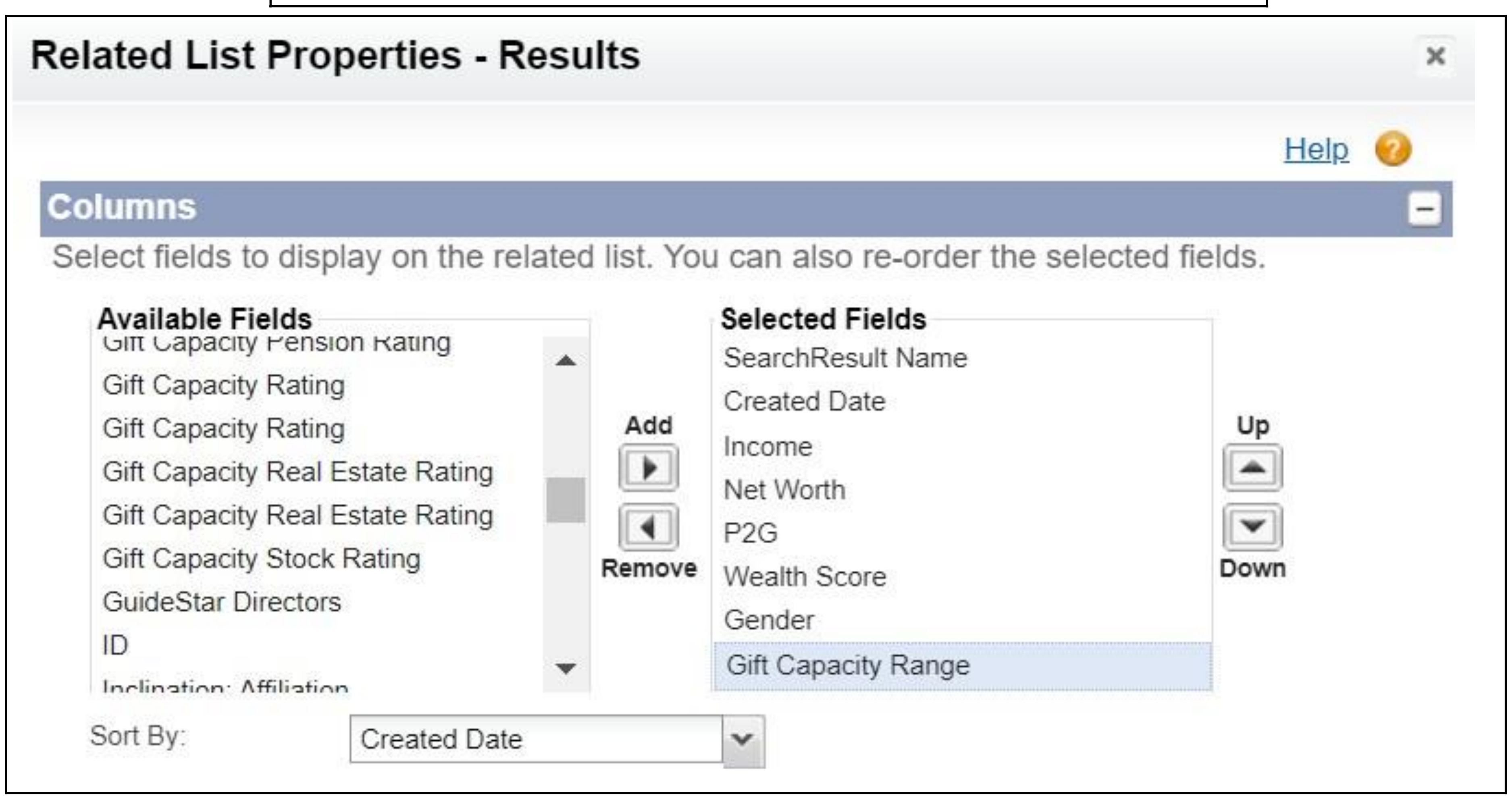


11. In the Contact Layout frame, select Related Lists and drag and drop the Results to Related List on the page



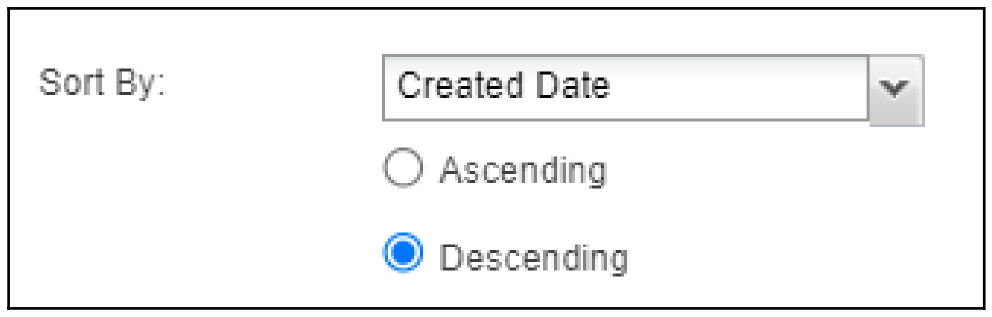
12. Click on the Results Related List Properties to edit. Use the wizard (Available Fields & Selected Fields) to display on the related list. Suggested fields are listed below or choose different fields that works best for your team.



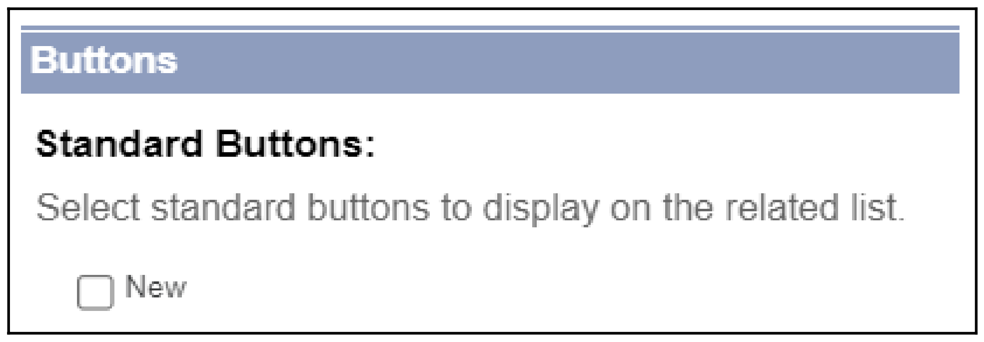


Non-Profit Suggested Fields:	Commercial Suggested Fields:
Created Date	Created Date
P2G Score	Net Worth
P2G Description	Cash on Hand
Gift Capacity Range	Income
Estimated Annual Donations	Age
Net Worth	Wealth Score
Total Assets	Direct Stock Holdings
Cash on Hand	Real Estate
Age	Total Assets

13. Choose to sort by Created Date in Descending order, this will ensure the most recent result is always listed first.

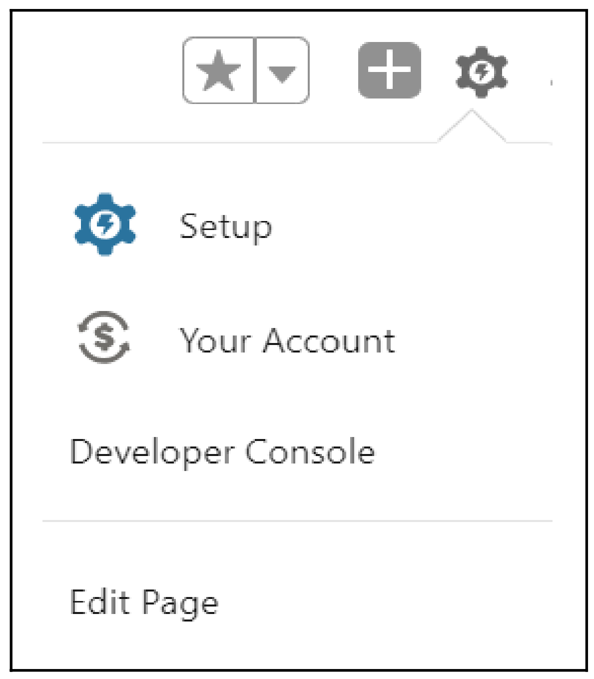


14. Open the button section and uncheck New then click on OK



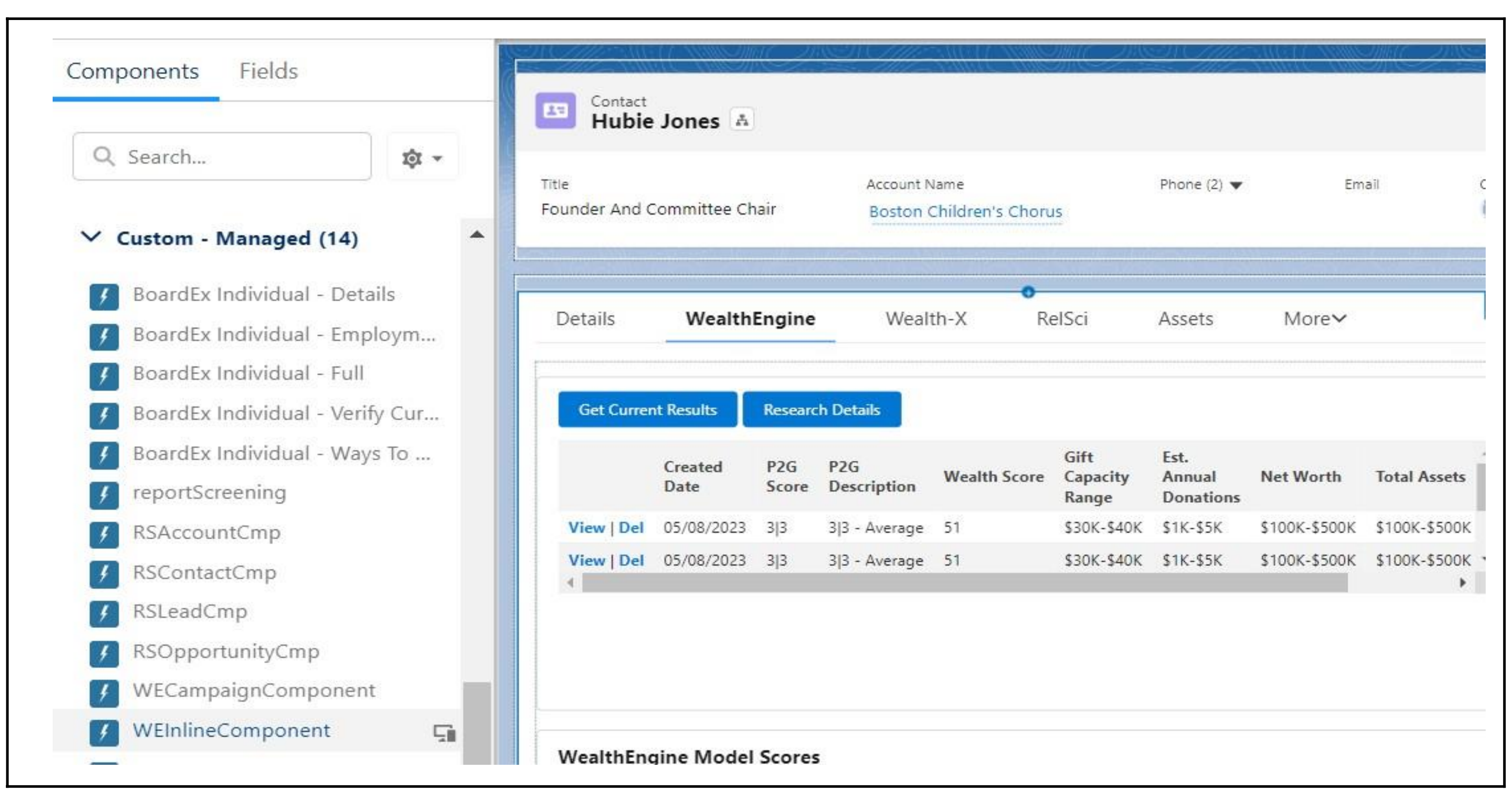
15. Save the Page Layout. Repeat steps 4-12 on any other page layout or object you would like to use the app with.

16. Lastly, we need to add the custom component to the Contact page using the Lightning page editor. To edit a Contact page, navigate to the Contact record in your system and click Edit Page in the Setup drop-down.



17. In the Components, scroll down to the Custom-Managed section and drag and drop the WEInlineComponent to the page per your preference. This component contains the two buttons that will be used to interact with the WE app

- **1. Get Wealth Info**
- **2. WE Research Details**

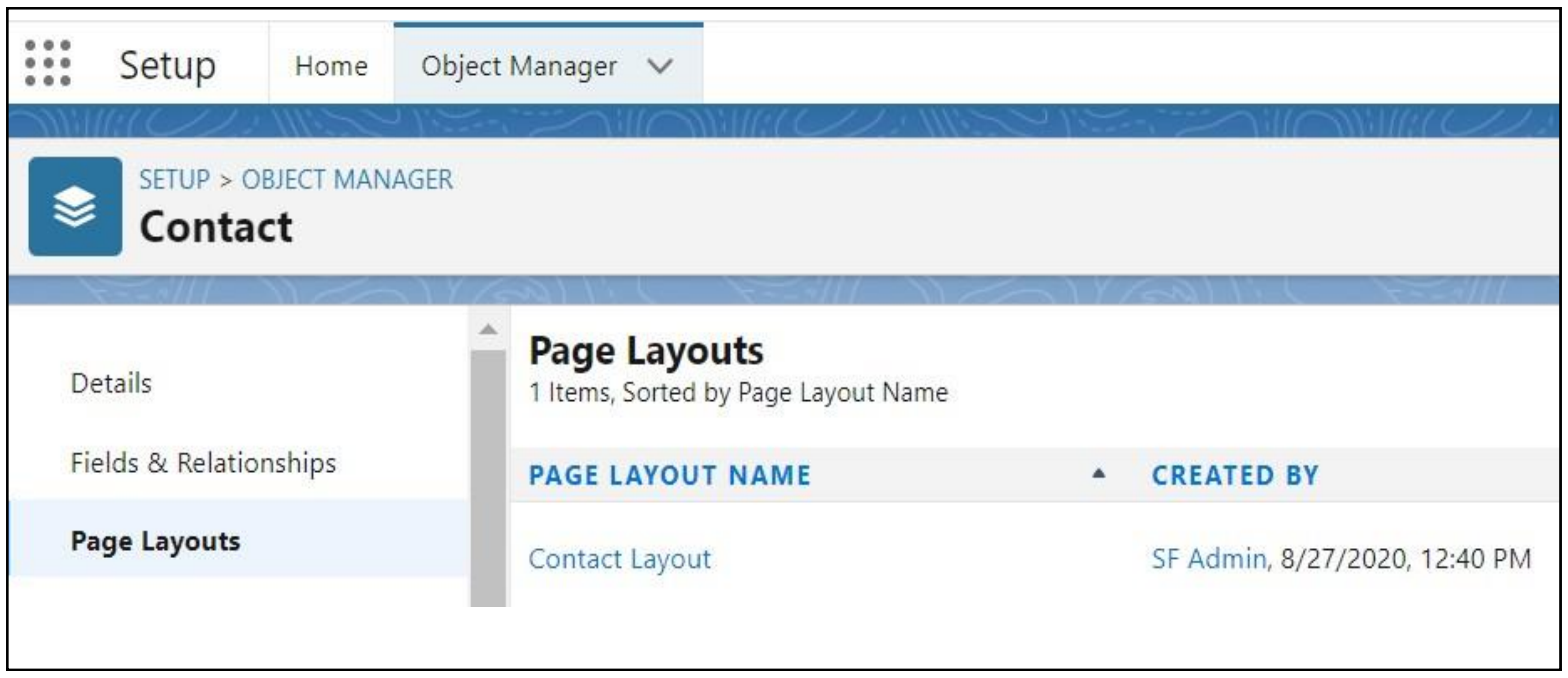


*Note: The custom managed components will only work if you have MyDomain implemented. To learn about MyDomain and how to implement see the Salesforce help article located here

18. Save the page and activate as needed. Repeat steps 15-18 for any other Objects or Lightning pages you would like to add this WealthEngine functionality.

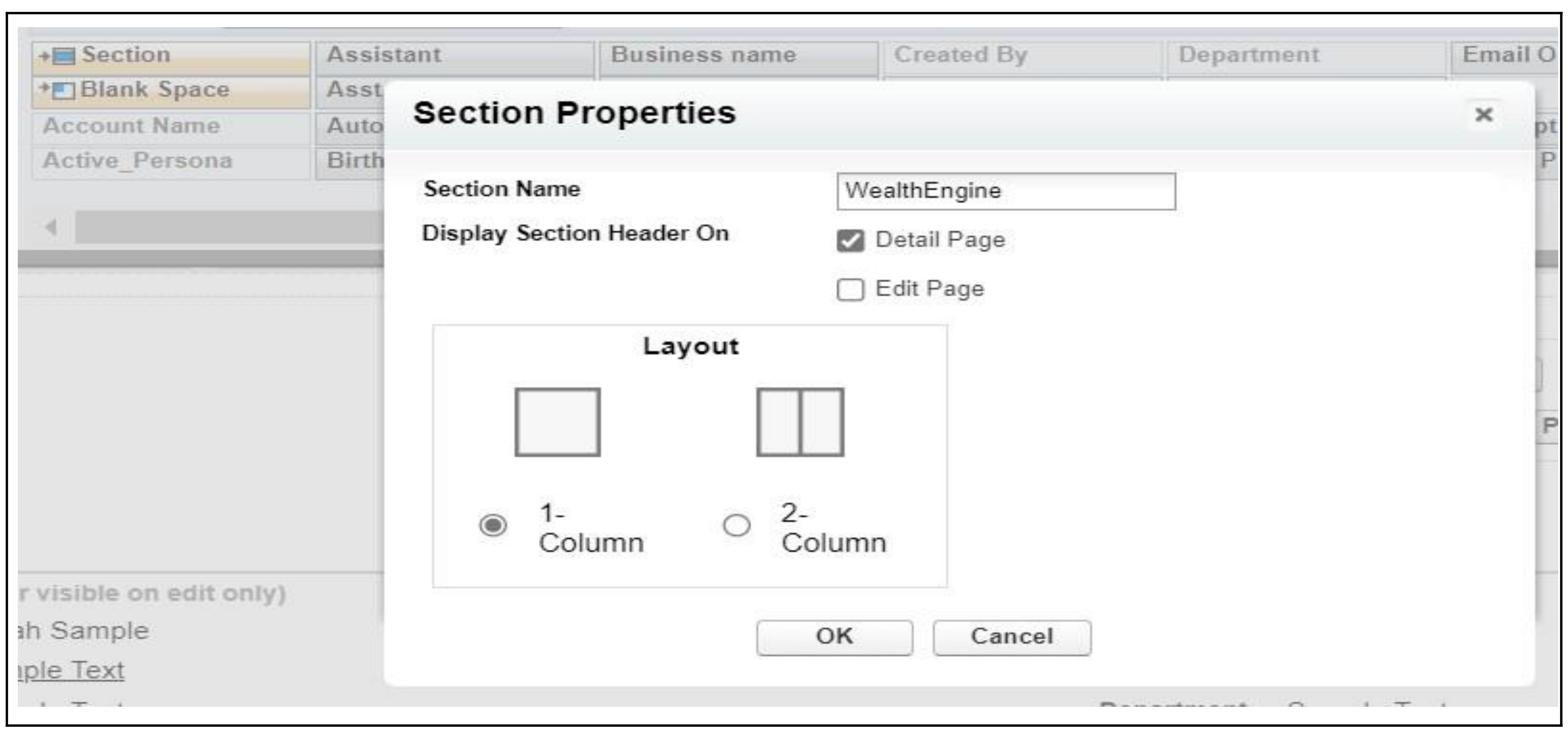
Option 2: Visualforce Page

1. Setup > Object Manager
2. Select Contact or Lead or Person Account
3. Choose Page Layouts



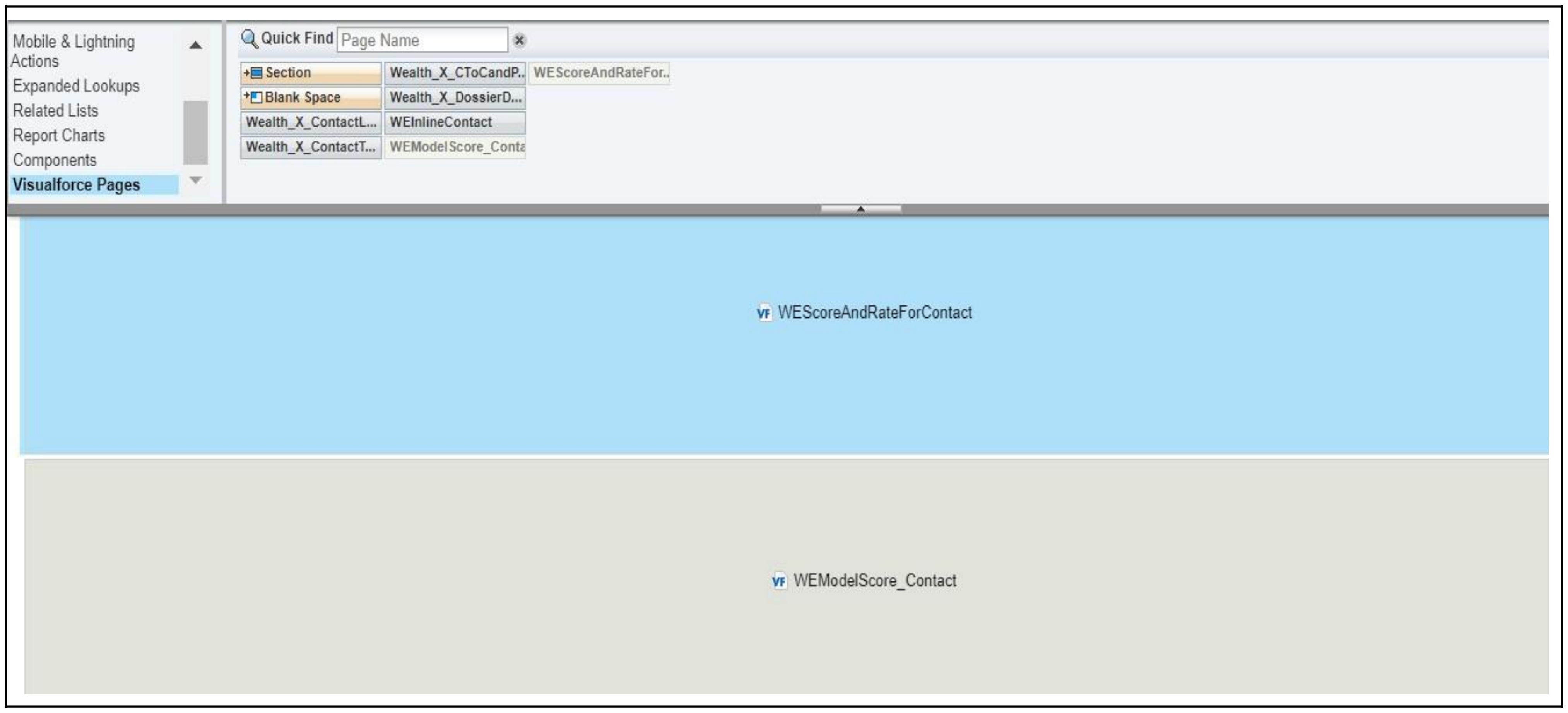
4. In the list of Page Layouts, click on the Edit action for the layout to which you want to include the WealthEngine app.

5. Once you have decided where the WealthEngine section should appear on the Page Layout, drag a Section from the Page Layout frame to the Page Detail area and drop it.

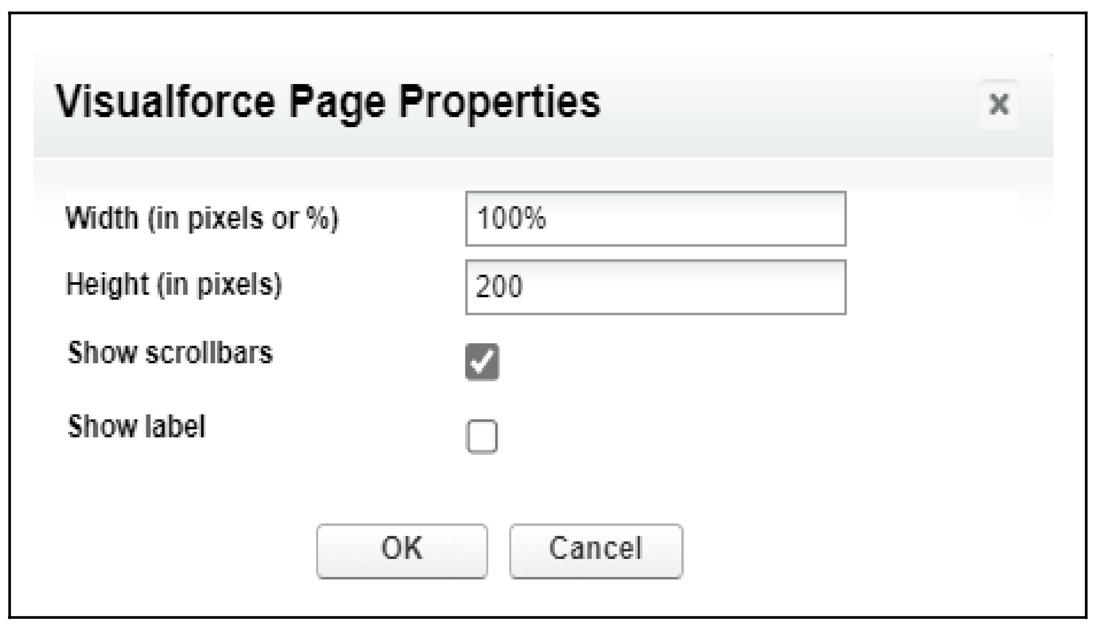


6. In the Section Properties window, name the section WealthEngine. Keep the Detail Page checked and uncheck the Edit Page option in Display Section Header On box. Choose the 1 Column layout and click on OK

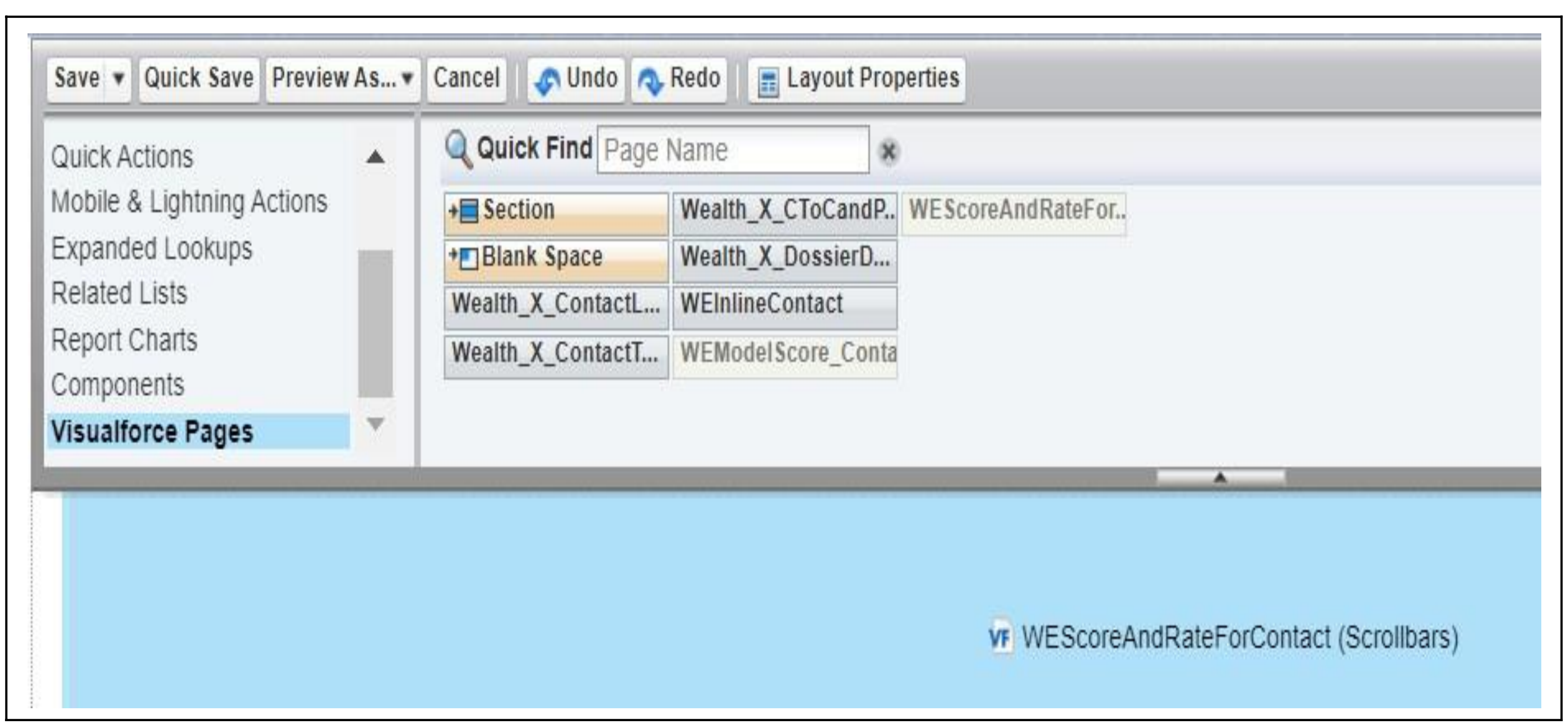
7. In the Contact layout frame, select Visualforce Pages and drag and drop the WEScoreAndRateForContact & WEModelScore_Contact and drop them in the new WealthEngine section you created in the previous step.



8. Click on the Properties icon (the "wrench" on the top right of the section). On the Visualforce Page, check Show scrollbars and click OK



9. Click the Save button at the top of the page. You can add WealthEngine to any other page layout by following the same steps.

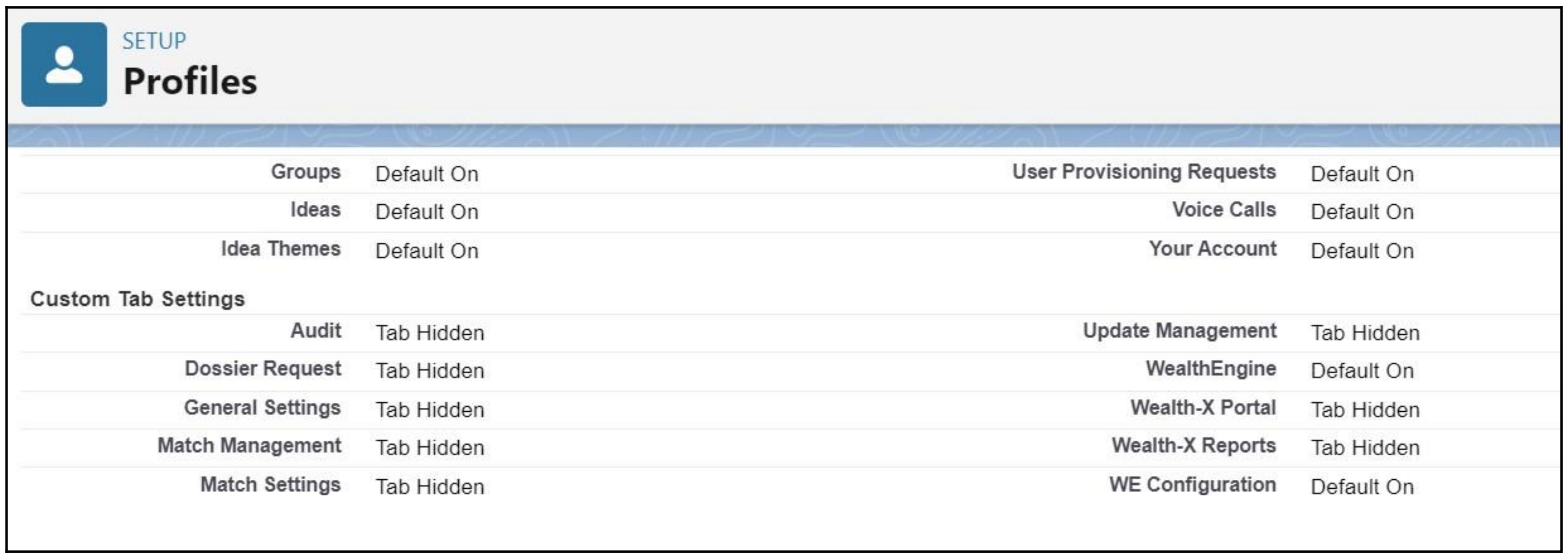


User Setup for WE Prospecting

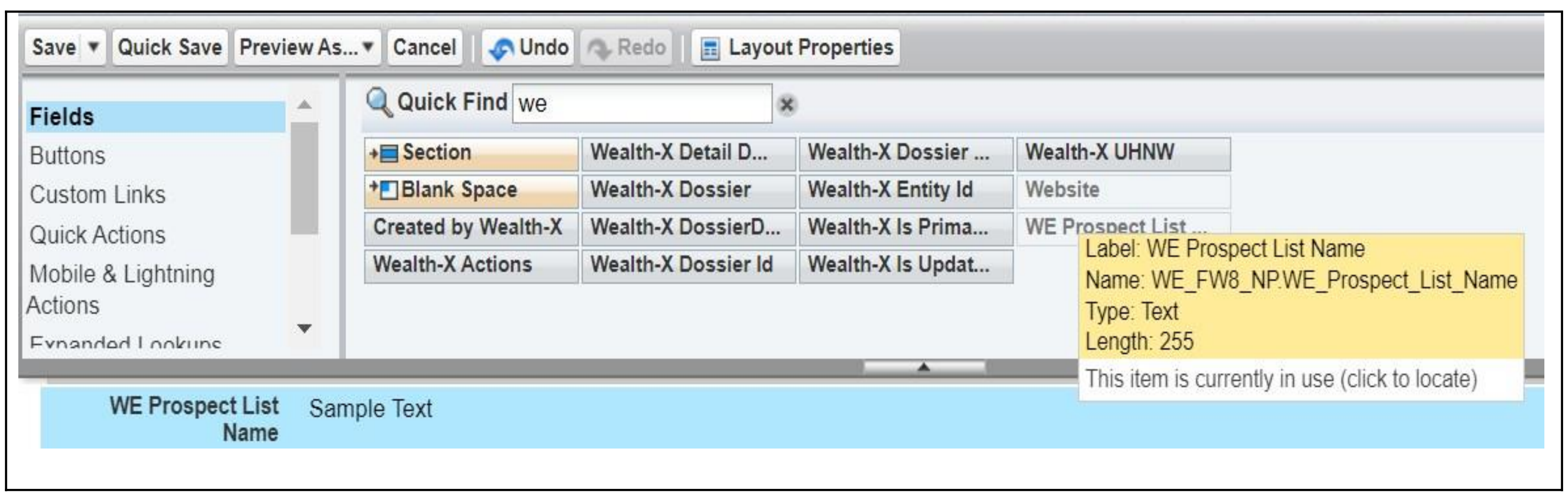
For WE Prospecting, the user will need access to the WealthEngine tab as well as an additional field on the Lead object.

1. If you have a WE app license, you should already have access to the WealthEngine tab, but to make sure, go to the Setup page> Manage Users> Profiles and for the user's profile, ensure the WealthEngine tab is listed as Default On.

Profile>Standard User>Tab Settings



2. Navigate to the Lead page layout by going to Setup> Object Manager>Lead>Page Layouts. Select to edit the applicable page layout. From the Lead Layout frame select the **WE Prospect List Name** field and drop on the page. Save the page layout.

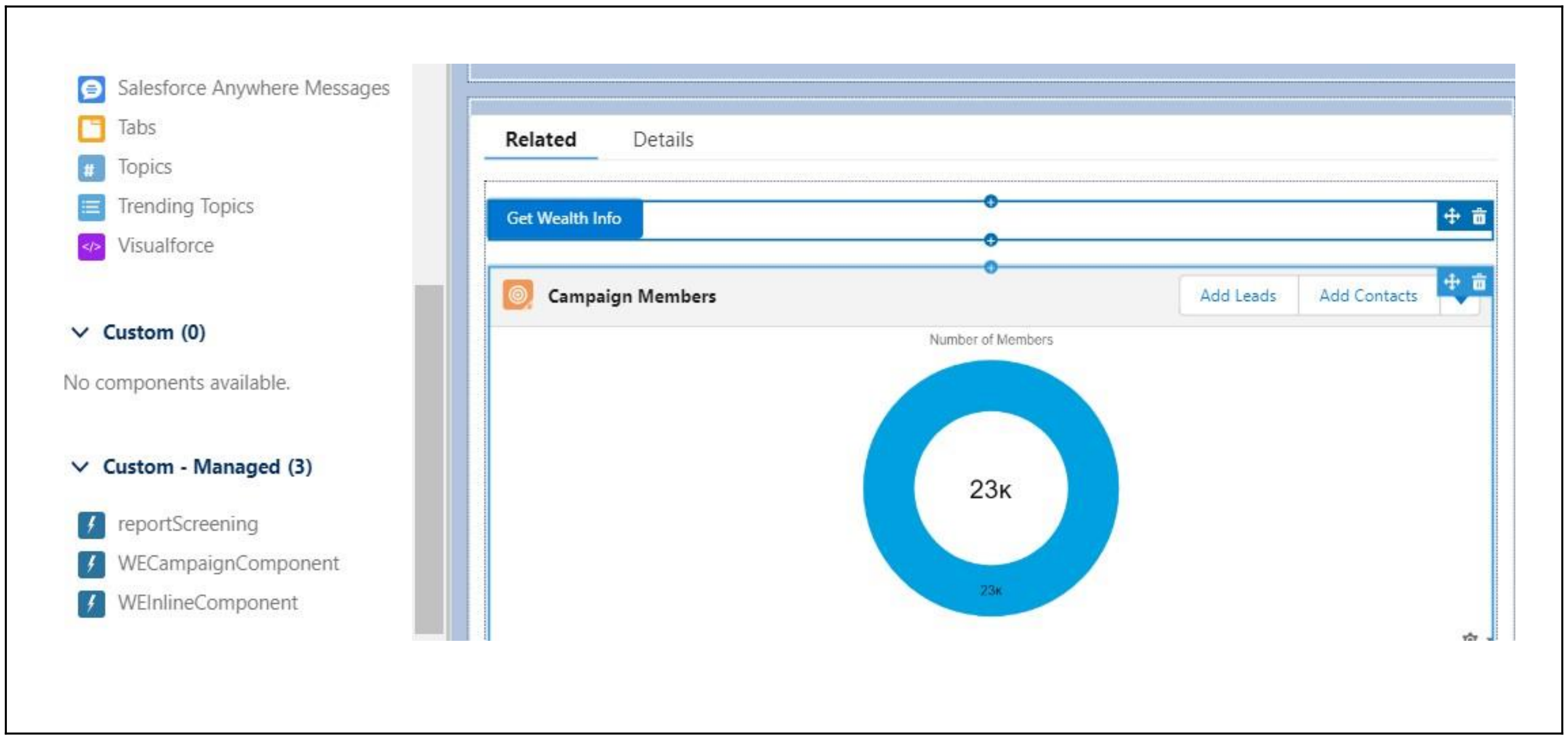


Bulk List Append (Screening) User Setup

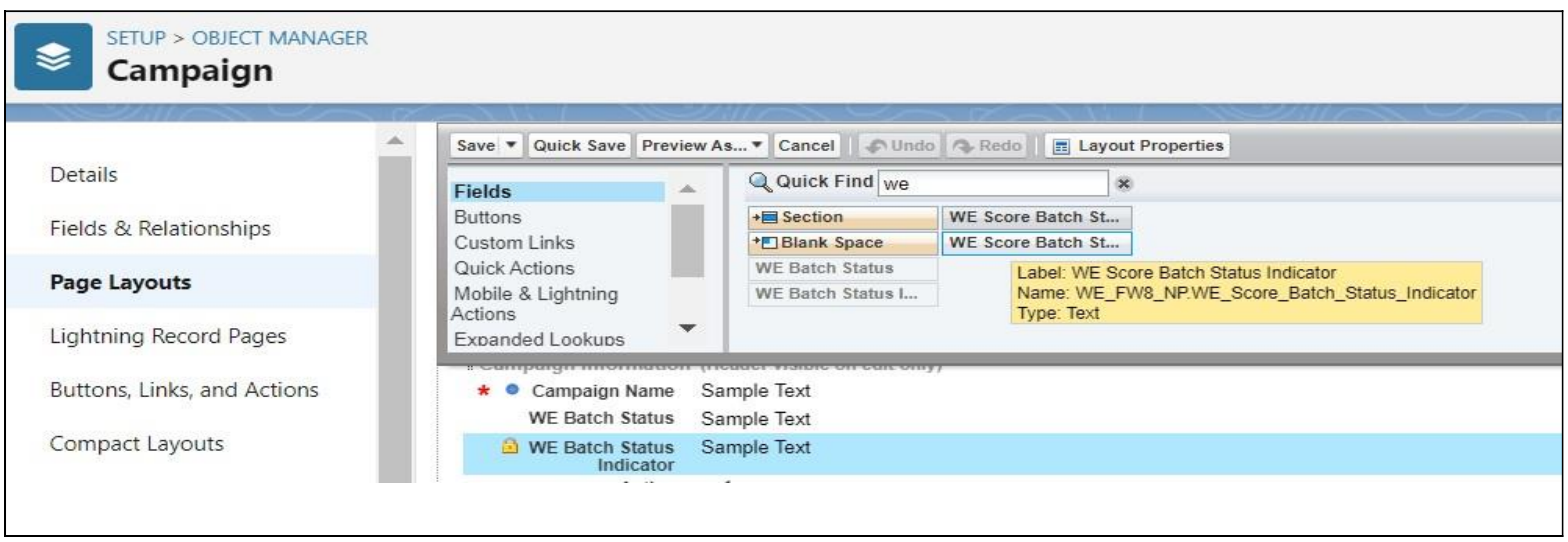
1. Ensure the user is a Marketing User by going to Setup>Manage Users>Users viewing their user settings. Check the box next the Marketing User if not already and save. This will give them access to create and edit Campaigns

2. Add the custom component to the page using the Lightning page editor. Navigate to Campaign record in your system and then click Edit Page from the Setup drop-down in the top right corner.

3. In the left navigation, scroll down to the Custom-Managed section and add the WE Campaign Component to the page per your preference. This component contains the WE button that will be used to interact with the WE app.



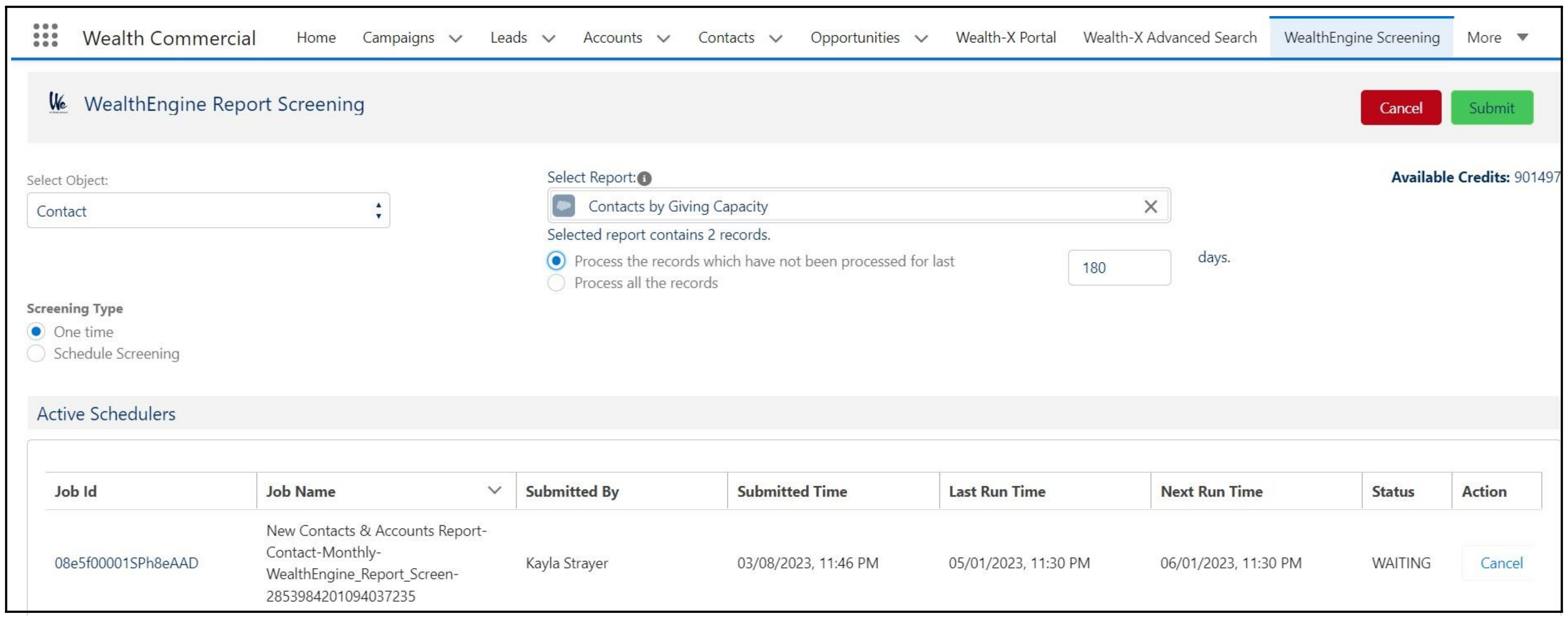
4. Navigate to Setup>Object Manager>Campaign Page Layout frame, select Fields and drop the WEBatchStatus and WEBatchStatus Indicator fields onto the page



5. Click the **Save** button at the top of the page. You can add fields/button to any other page layout by following the same steps.

1. WealthEngine Report Screening

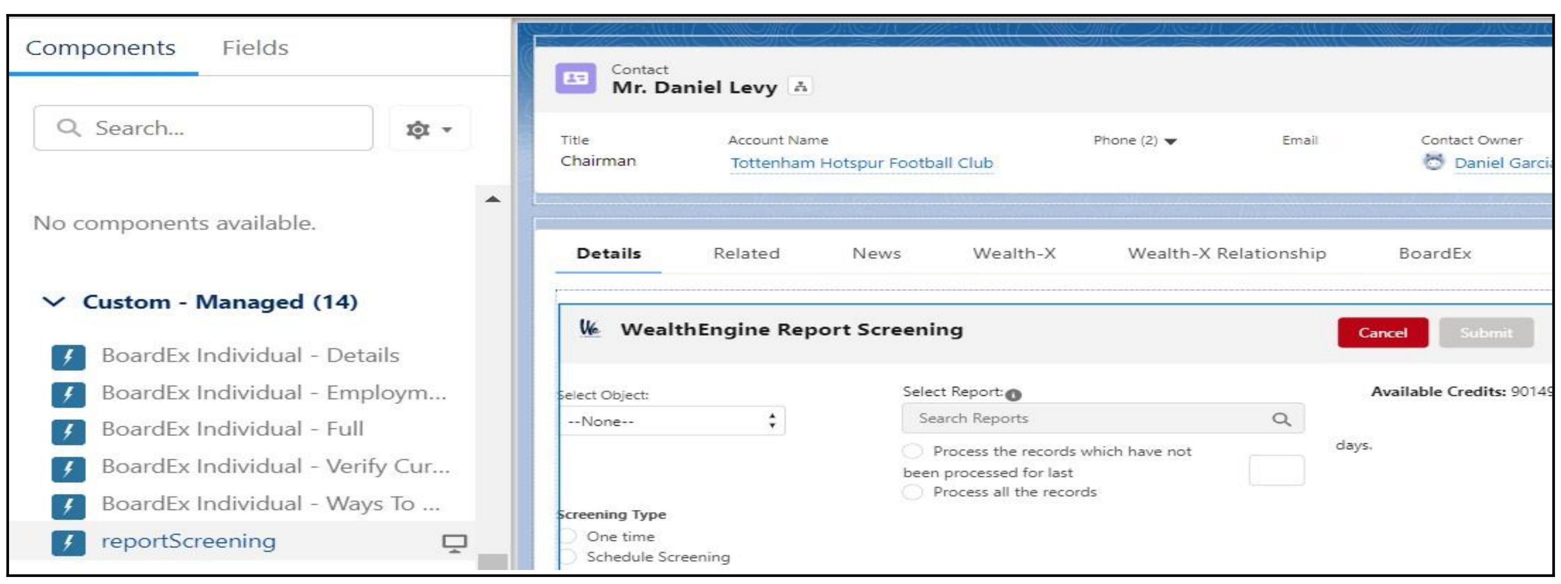
To screen Salesforce reports against WealthEngine, utilize the new feature by accessing the WealthEngine Screening tab. Then, choose the report you wish to screen and click on the Submit button.



a) To begin the setup process

- Go to the WealthEngine Screening tab.
- From the Setup drop-down menu, select "Edit Page"
- Scroll down to the Custom-Managed section on the left and drag the **report Screening** component onto the page based on your desired placement.

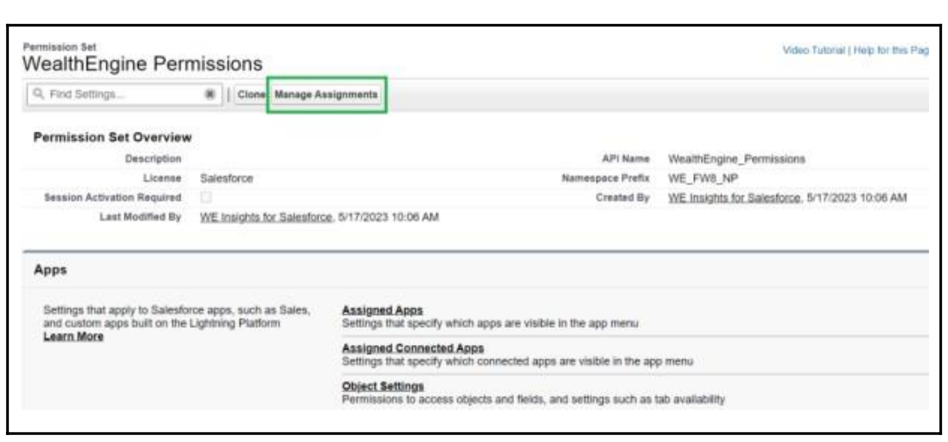
This component includes the layout for WealthEngine Report Screening as well as a button to interact with the WE app.

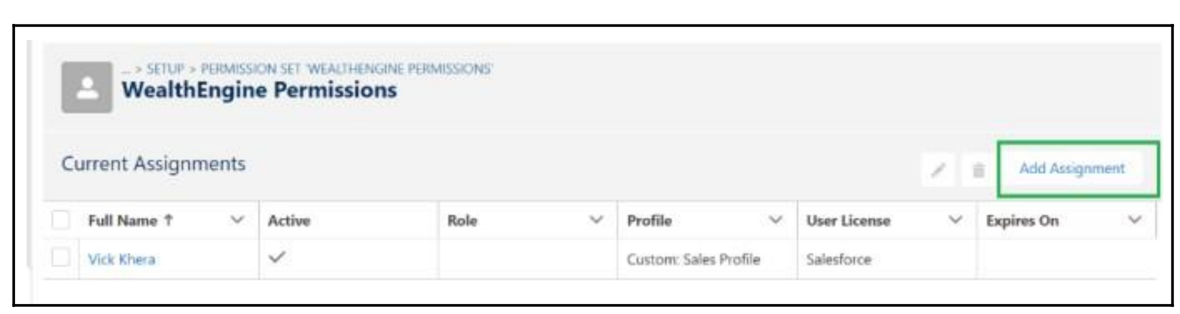


b) Control the level of access for different users for WealthEngine Screening tab.

The Salesforce administrator has the authority to determine which users have access to the WealthEngine Screening tab. To grant access, the administrator needs to assign the "WealthEngine Permissions" permission set to the respective users.

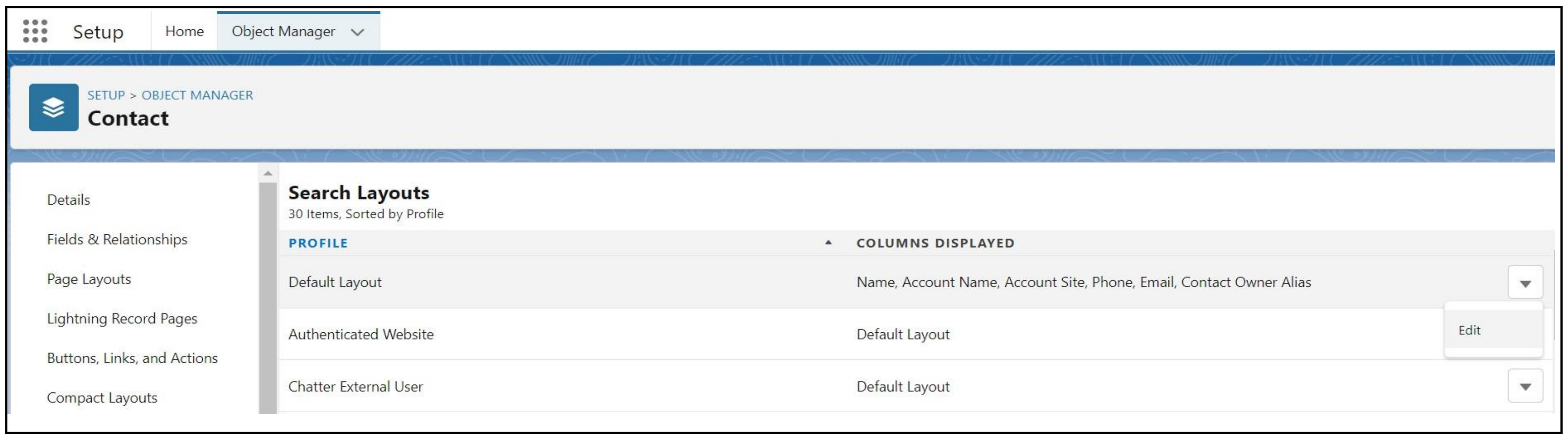
Step 1: Go to Setup > Search for Permission Sets
Step 2: Open “WealthEngine Permissions” permission set
Step 3: Click on the Manage Assignment button
Step 4: Click on Add Assignment button and select the users to whom you want to grant access.
Step 5: Click on the Assign button





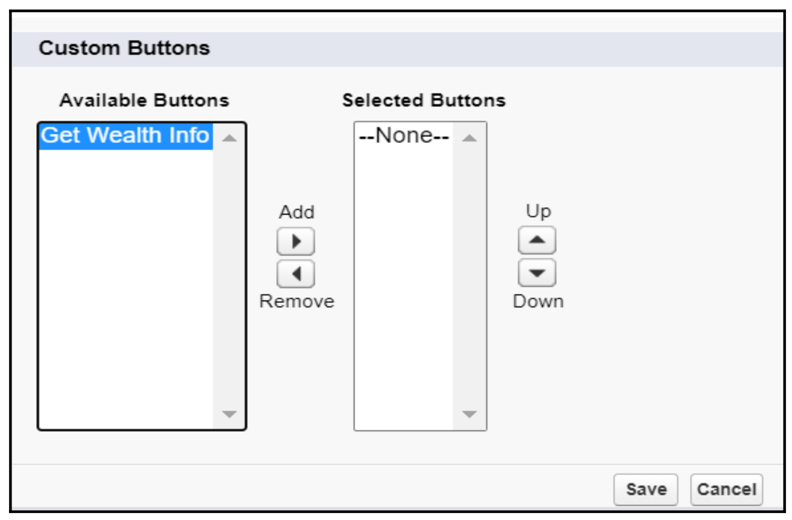
2. List View Screening

The List View Screening feature allows to screen standard or custom list views for Lead, Contact or Person Account objects. To use this feature, the following setup is required:

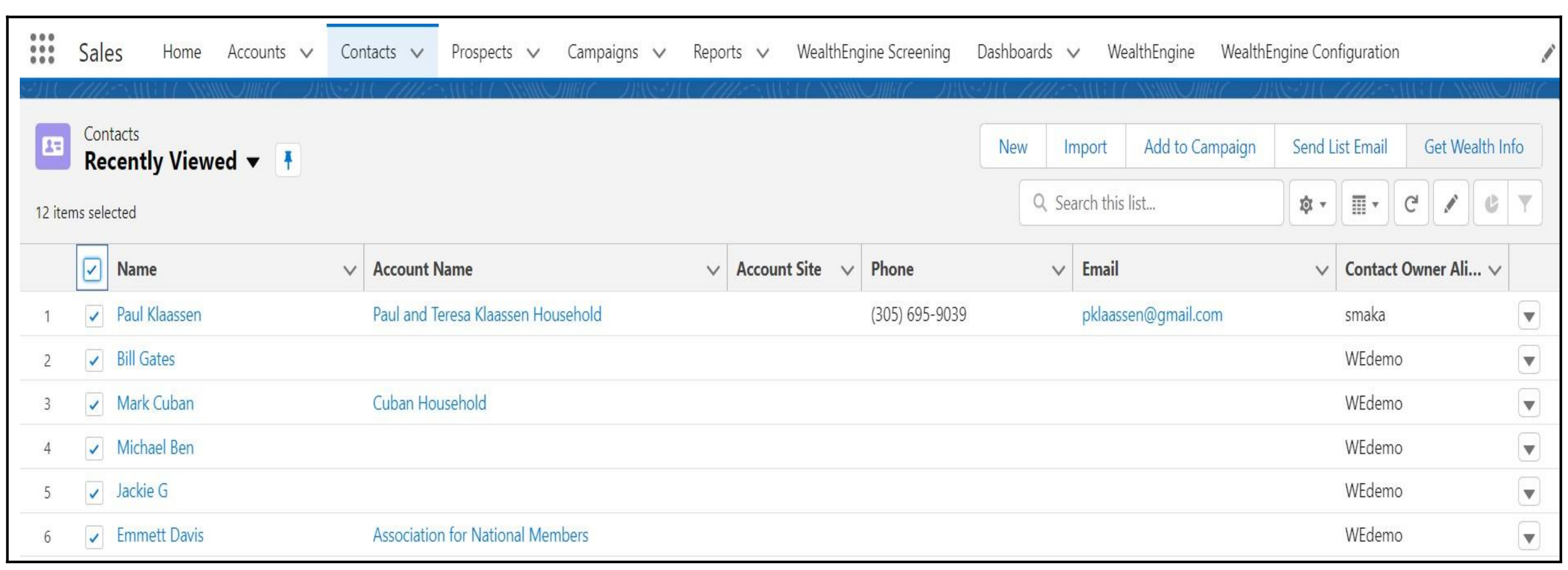


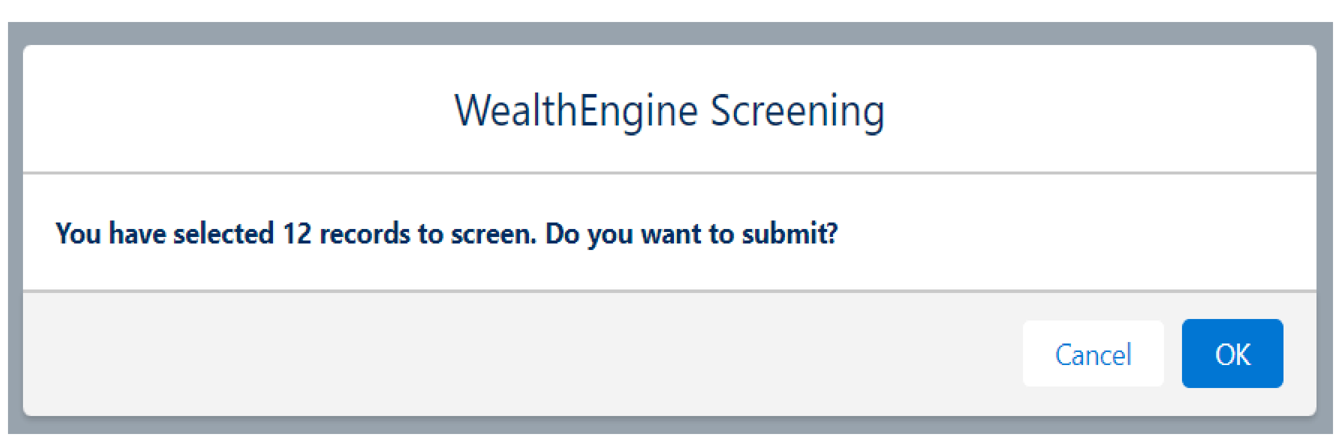
- a) Go to Setup > Search for Contacts in quick find box or locate Contacts in the Object manager then click on “Search Layouts”

- b) Click on Edit for Default Layout. Under Custom Buttons>Select “Get Wealth Info” button from available buttons list and click on Add Icon: Save It.



- c) Click on Contacts tab and open any List view, you will see **Get Wealth Info** button: Select any records you wish to screen and click **on Get Wealth Info** button

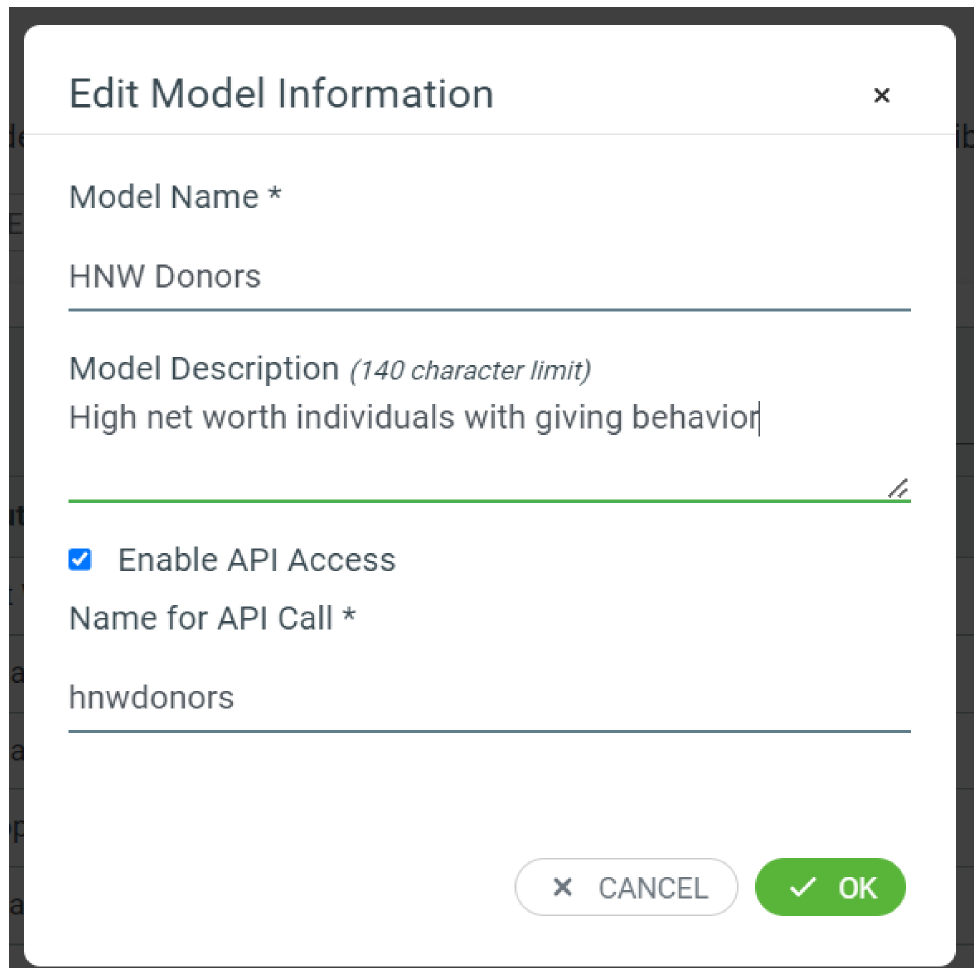




- d) Repeat Steps a to c for Lead and Person Account objects.

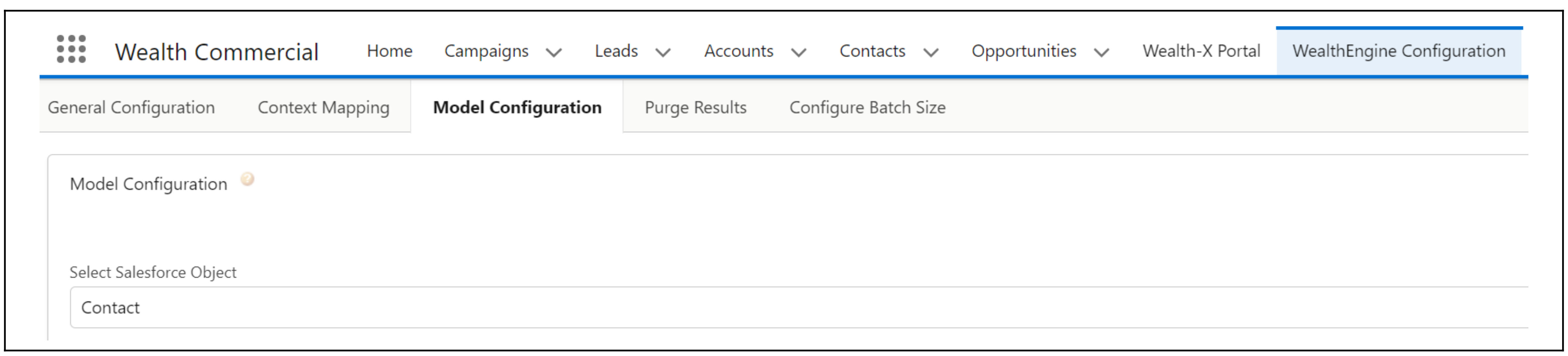
Model Mapping in WE

Organizations can now score their leads, contacts, or person accounts against models built in the WealthEngine platform. For models built within the WE9 platform, make sure they have their own API endpoint. To set this up, go to the Model tab in WealthEgnine, select the Model you want to use for scoring in your Salesforce instance, enable API access by checking the designated checkbox, and then create a name for the API call before clicking OK.

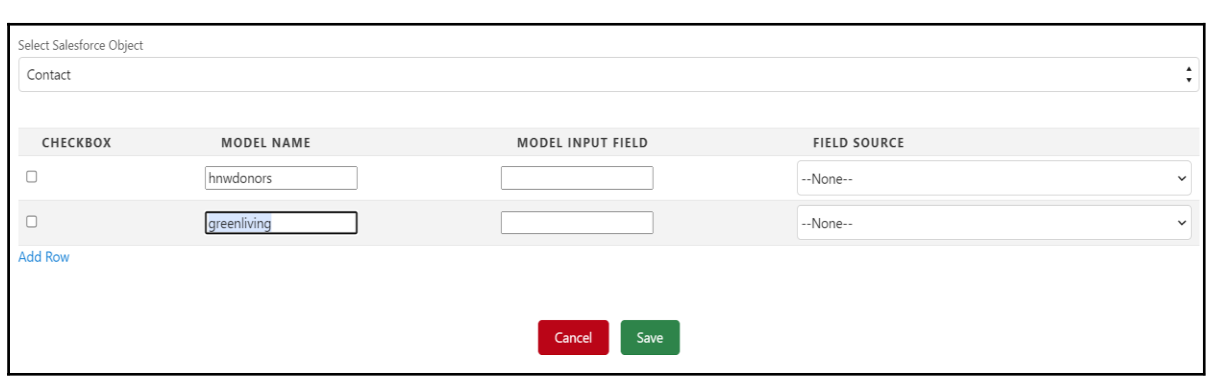


Model Mapping in Salesforce

- Review the page layout setup for Contact Object in page 5, step 9 and make sure WEMODELScore is added to the page
- To map the Model in SF, first navigate to the WealthEngine Configuration tab and click on Model Mapping. Then select the object (Contact) you are using from the dropdown menu

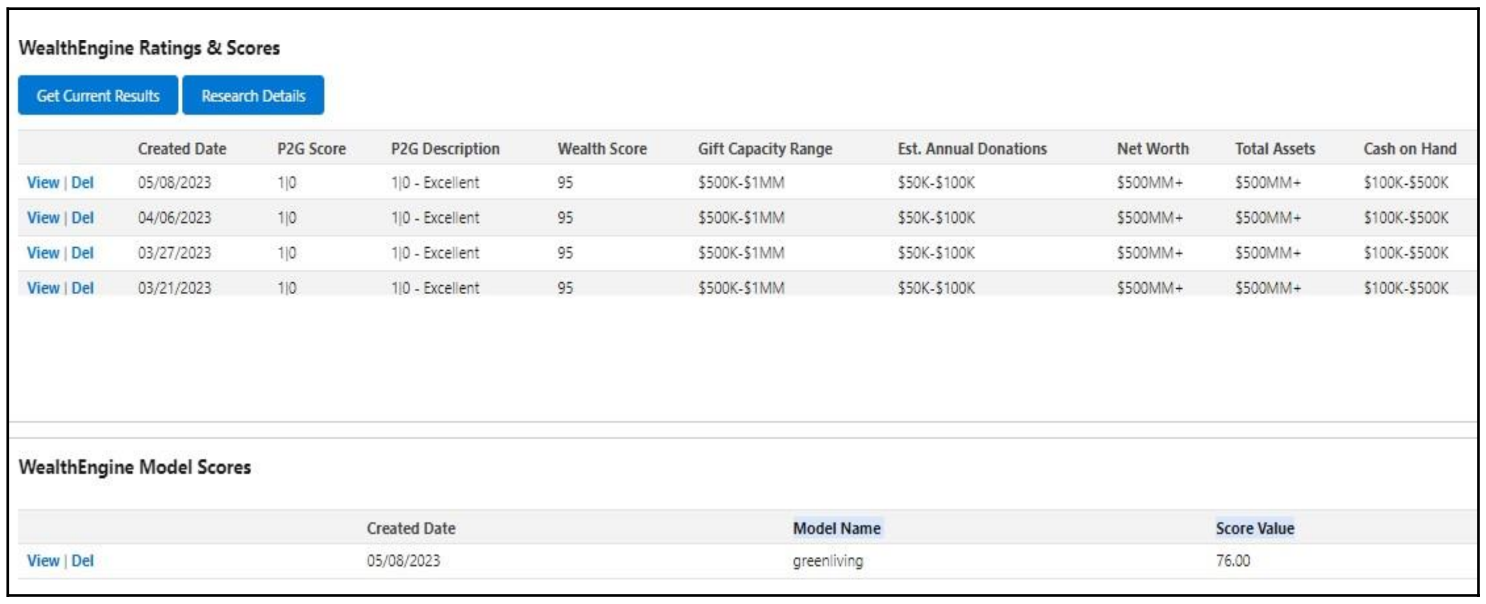


- The default mappings will be *displayed*, followed by any models already mapped. To add a new model, click on "Add Row" and add the name. Lookalike Models created within the WealthEngine platform do not require any additional input under MODEL INPUT FIELD & FIELD SOURCE. Click on Save once complete



- In the same way, other objects can be mapped at any time by following same steps.

Note: Name for API Call needs to be all lowercase and all one word (no spaces. This is necessary for the API to successfully pull data from WE into SF. For instance, instead of using "Green Living", use "**greenliving**".



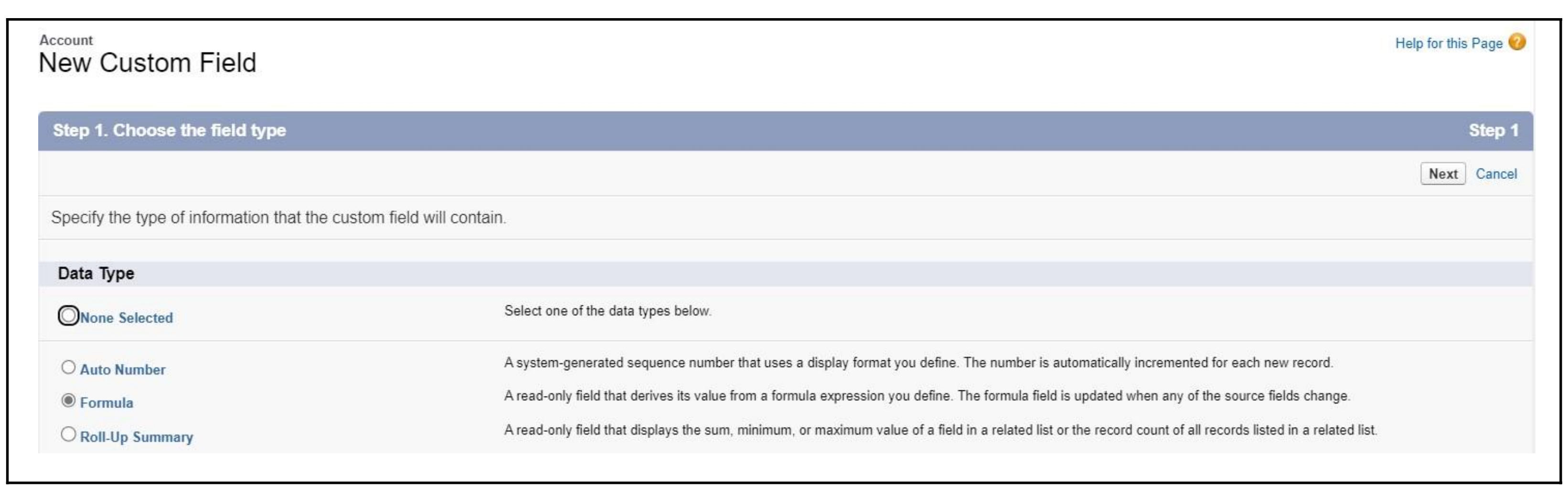
Configure Individual Accounts:

In order to use individual Accounts, it is required to create two custom fields on the Account object that can extract the First name and Last name information from the associated Contact record.

A. **Creating custom field for First Name**:

1. Go to Setup
2. In the Object Manager search for Account
3. Fields & relationship

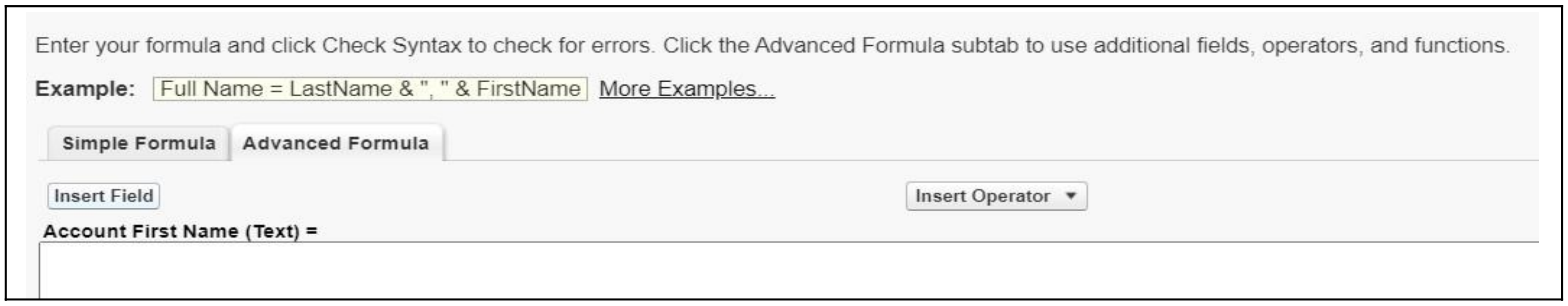
4. Click on New custom field
5. Select Formula data type and click **Next**



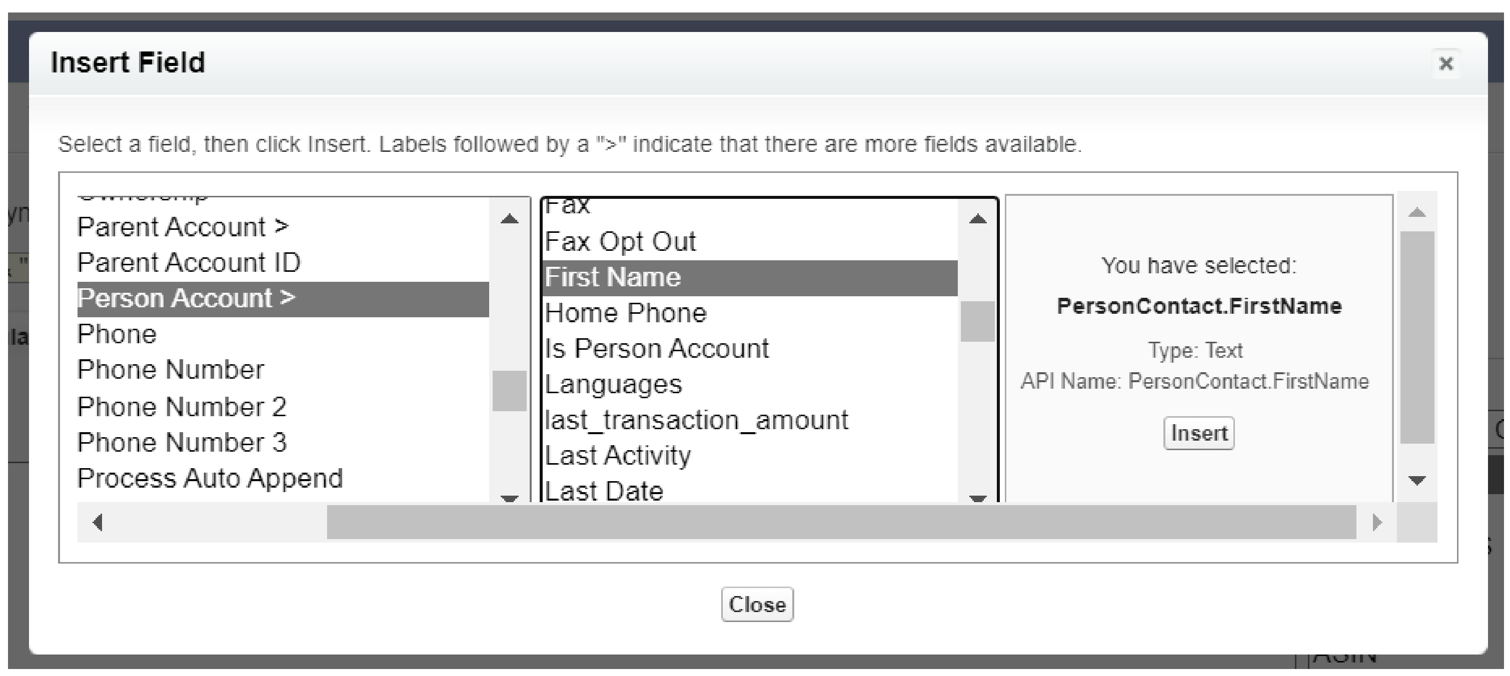
6. Enter below values and click **Next**

Field Label: Account First Name
Field Name: Account_First_Name
Formula Return Type: Text

7. Switch to Advanced Formula and Click on Insert Field button:



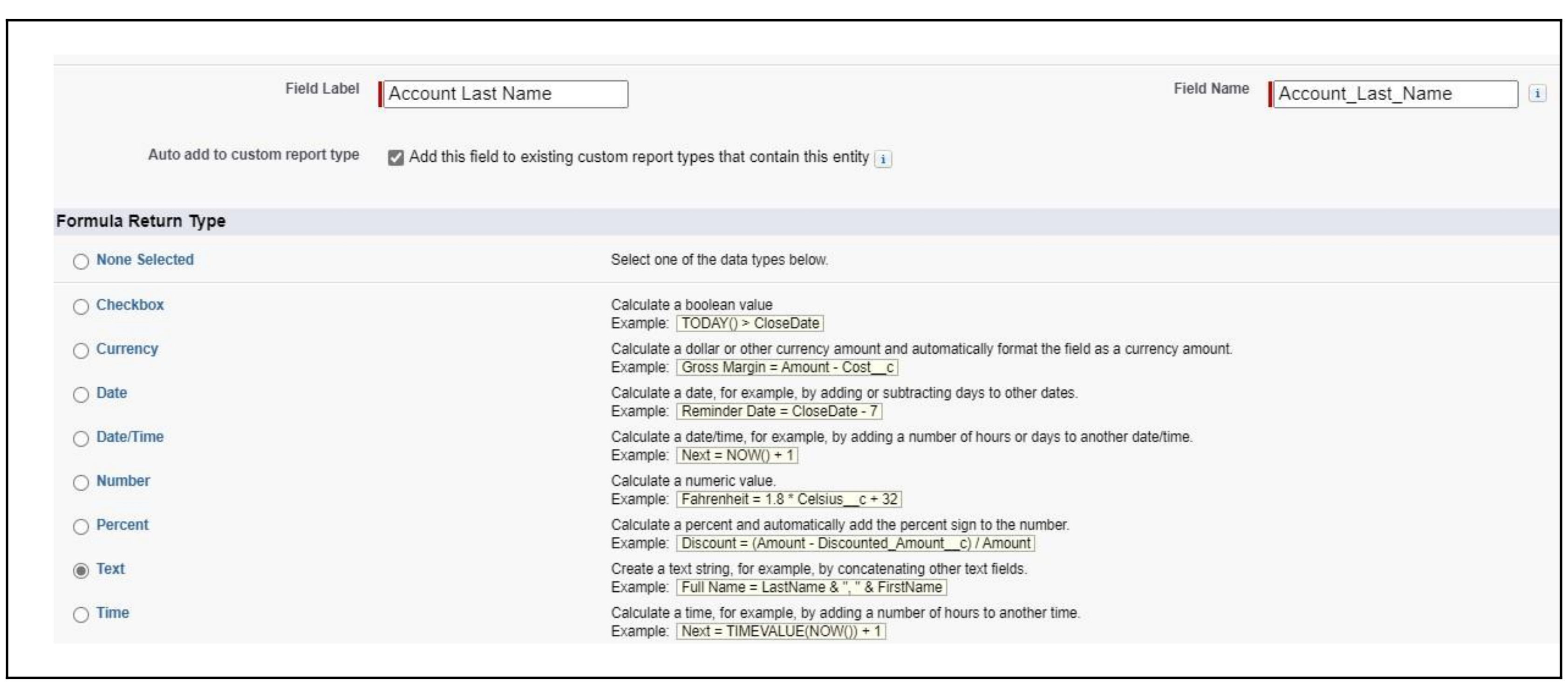
8. Select Account> Person Account> First Name> Click on Insert button>Next & Save



B. Creating custom field for Last Name:

Repeat the same steps to create formula field for Last Name and enter below details in Step 2:

Field Label: Account Last Name
Field Name: Account_Last_Name
Formula Return Type: Text



C. Updating context mapping page for Individual Accounts:

1. Open WE Configuration tab
2. Click on Context Mapping tab and select Individual Accounts.
3. Click on Edit button.
4. Map below fields and click on Save button.

WEALTHENGINE FIELD	SALESFORCE FIELD
First Name	Account First Name
Last Name	Account Last Name
Middle Name	
Suffix	
Email	
Age	
Phone	
Street Line 1	Billing Street
Street Line 2	
City	Billing City
State	Billing State/Province
Postal Code	Billing Zip/Postal Code
Country	Billing Country

Admin Settings / WealthEngine Configuration

General Configuration

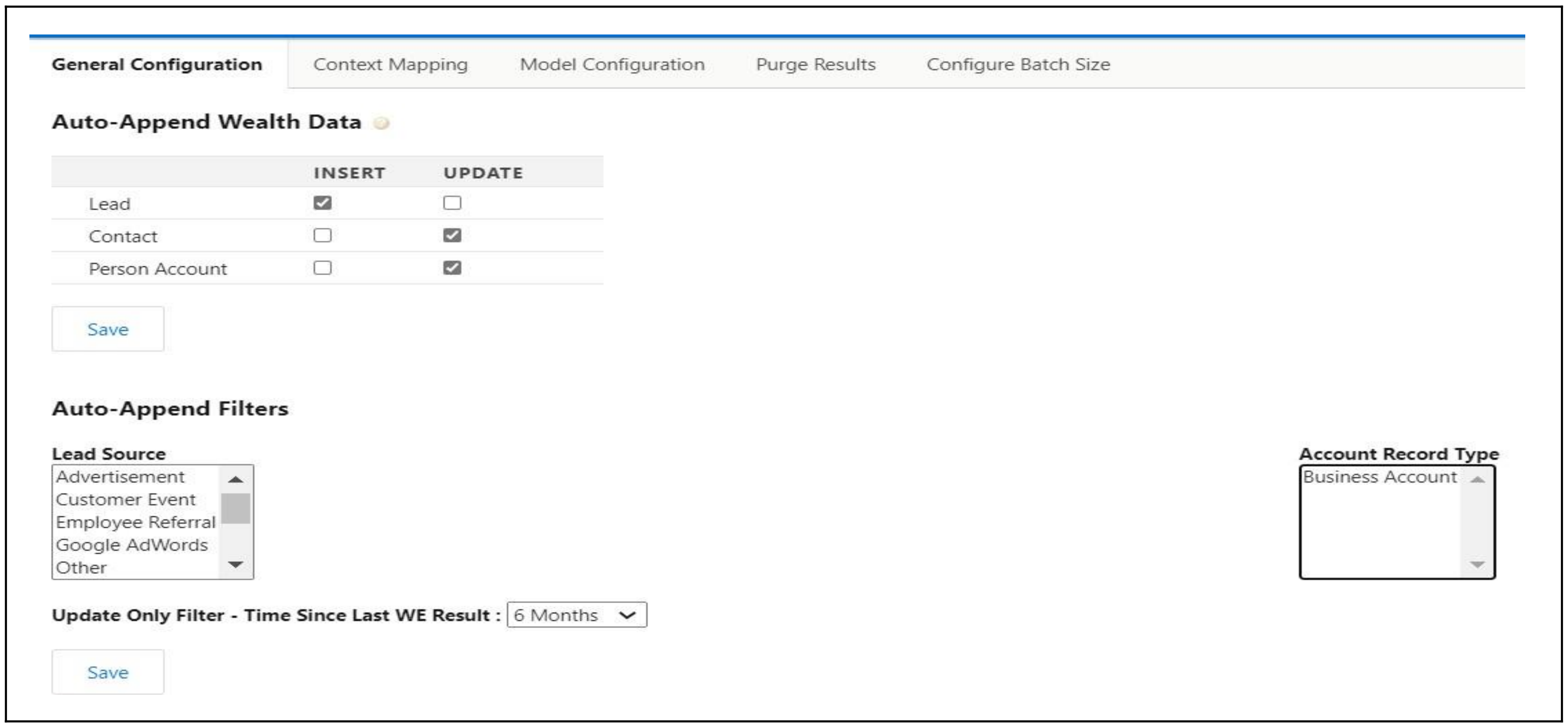
- **Auto-Append Wealth Data**

The auto-append feature can be enabled by SF Account admins. This will automatically get wealth data on newly created Leads, Contacts, and Person Accounts in your Salesforce org. This does require Data Services credits purchased with WealthEngine, so you will want to check with your WE admin before turning this feature on.

- **Auto-Append Filters**

Admin can enable the Auto-append Wealth data for Leads, Contacts, and Person Account objects either when a new Contact/Lead is inserted or an existing Contact/Lead is updated. In addition, you can apply filters such as lead source, record type, and time filters.

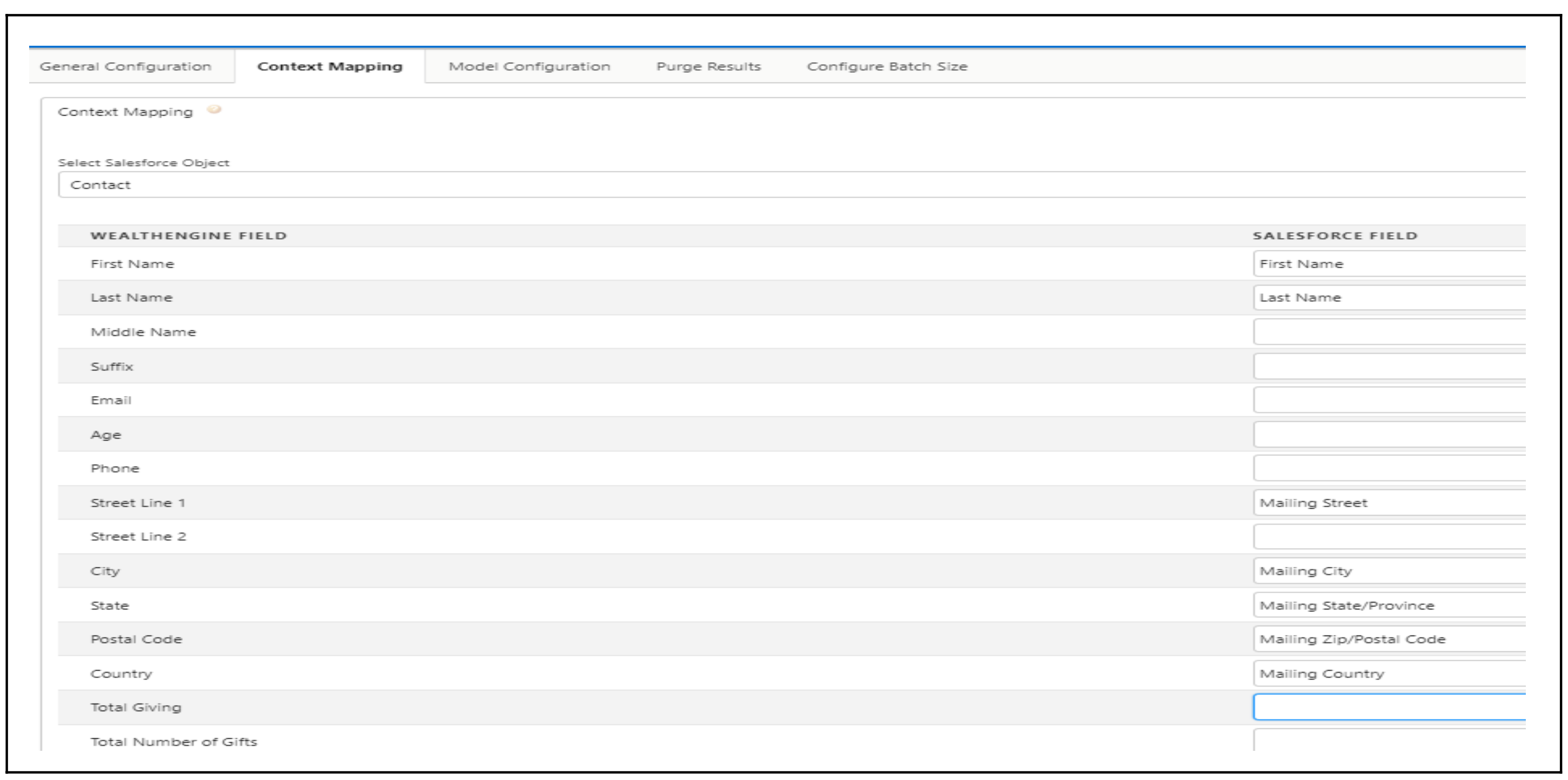
First, navigate to the WealthEngine Configuration tab. To turn on this feature, simply check the boxes in the insert or edit columns and select any of the filters that you would like this to be turned on for, and click Save. This can be turned off at any time by unchecking the box and clicking Save.



Context Mapping

Each organization can specify which SF fields are used when sending the data to WealthEngine. Upon installation, the default name and address fields are mapped, but these can be changed if they are not the primary fields your organization uses.

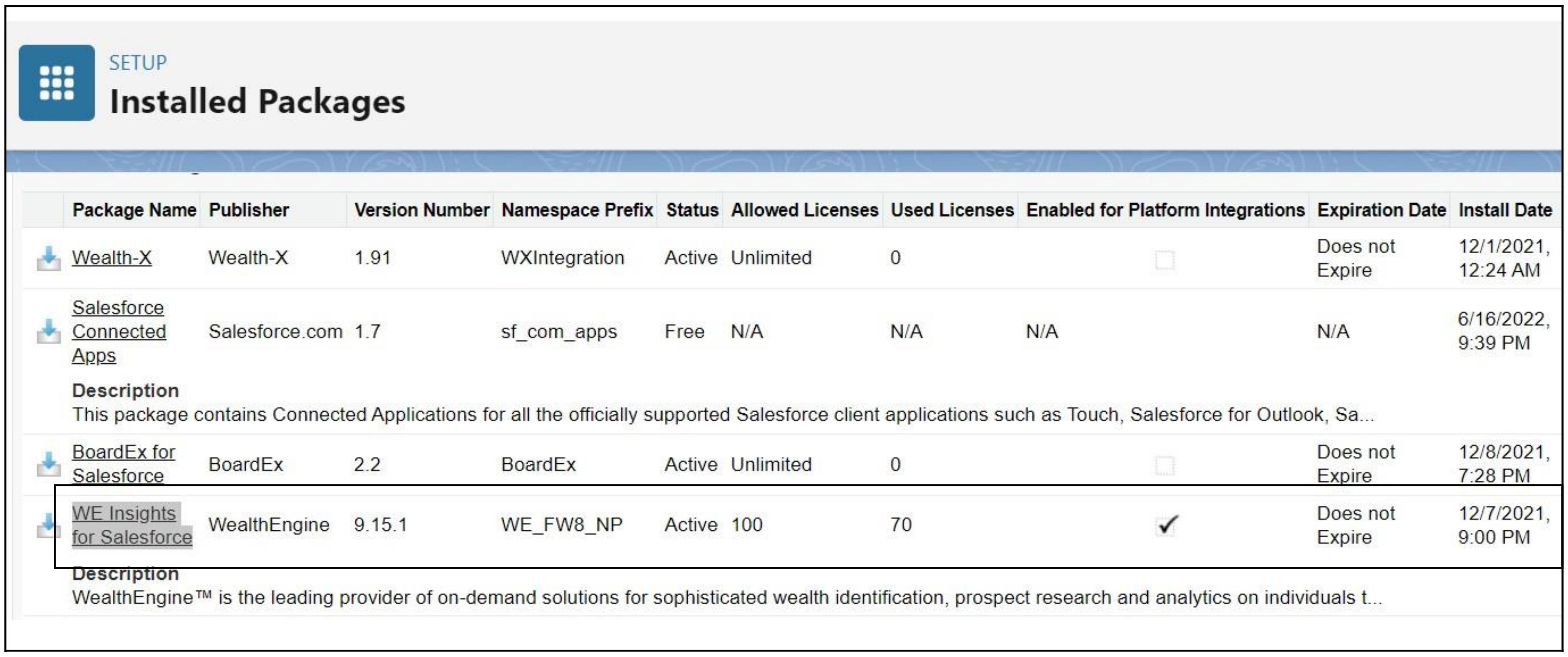
Also, there is a list of other possible values that do not have a default SF field including Age, Email, Total giving, etc. These can be mapped to custom fields you are using on those objects. For any Non-profit client considering doing a bulk list append (screening) we encourage you to map Giving fields (especially Total giving) to allow you to take advantage of some of the reports in WE.



Note: When mapping Giving Fields, please ensure that the dates are in the following format: MM/DD/YYYY

Assign Licenses

To assign licenses for the WE Insights for Salesforce app, your organization must have purchased a specific number of WE for Salesforce Connector licenses. These licenses must be allocated to users within your organization. Only users with a licensed seat assigned to their Salesforce user account will be able to access and use the WEInsights features.



Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Enabled for Platform Integrations	Expiration Date	Install Date
Wealth-X	Wealth-X	1.91	WXIntegration	Active	Unlimited	0	☐	Does not Expire	12/1/2021, 12:24 AM
Salesforce Connected Apps	Salesforce.com	1.7	sf_com_apps	Free	N/A	N/A	N/A	N/A	6/16/2022, 9:39 PM
Description This package contains Connected Applications for all the officially supported Salesforce client applications such as Touch, Salesforce for Outlook, Sa...									
BoardEx for Salesforce	BoardEx	2.2	BoardEx	Active	Unlimited	0	☐	Does not Expire	12/8/2021, 7:28 PM
WE Insights for Salesforce	WealthEngine	9.15.1	WE_FW8_NP	Active	100	70	✓	Does not Expire	12/7/2021, 9:00 PM
Description WealthEngine™ is the leading provider of on-demand solutions for sophisticated wealth identification, prospect research and analytics on individuals t...									

To access the license settings:

1. Go to Setup> Installed Packages:
2. Locate the WealthEngine package and view your Allowed licenses, Used licenses, and Expiration date. By default, you will have 1 license after installation of the WE package, but this number can be adjusted to match your purchased number of seats. If you need to make this change, please contact customer support at customerservice@wealthengine.com.
3. To add/remove users, select "Manage Packages".
4. Then, use the "Add Users" and "Remove" buttons to assign licenses according to your needs. Note that once you hit your license limit, the "Add Users" button will no longer function until another user is removed or additional licenses are purchased.

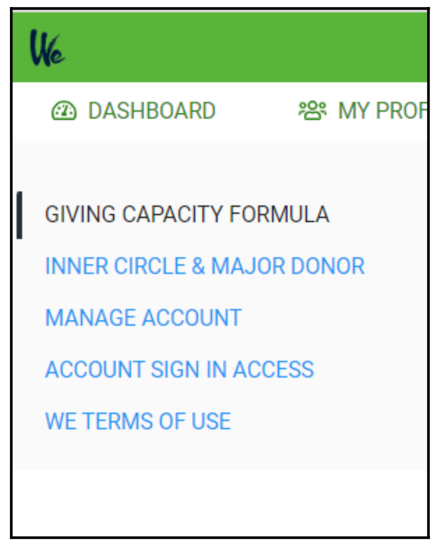
Connect your Salesforce & WealthEngine

To connect your Salesforce and WE accounts, the WealthEngine app first authenticates and checks for user-based permissions by verifying that the Salesforce user's email matches the WE username. After this check, the app will then verify if the user has the correct permissions on the WE side. Therefore, it is recommended to review your WE admin to ensure that all users have been properly set up on the WE side.

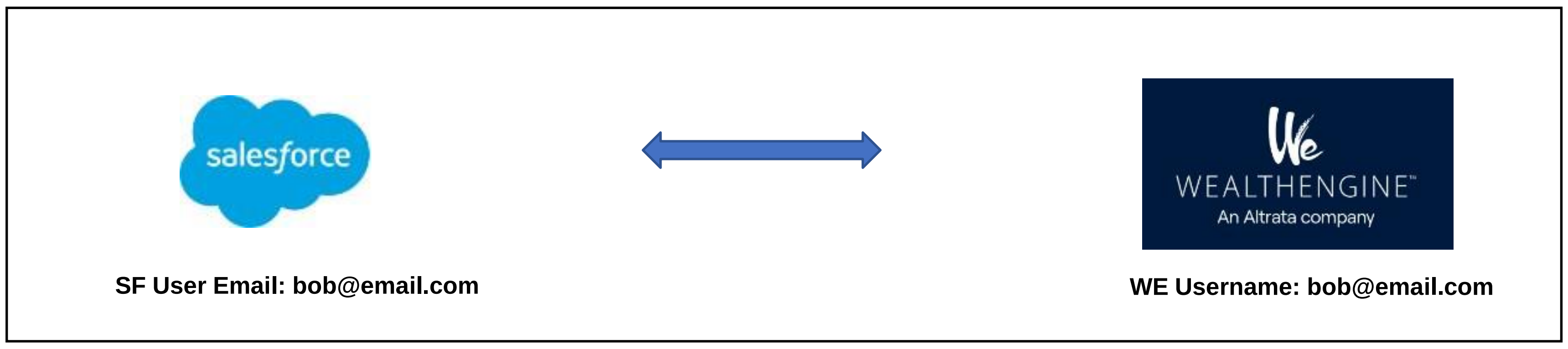
The WE admin will also need to establish a master connection between the WE organization and your SF organization, which can be accomplished by following the steps detailed below.

WEAdmin Step: 1

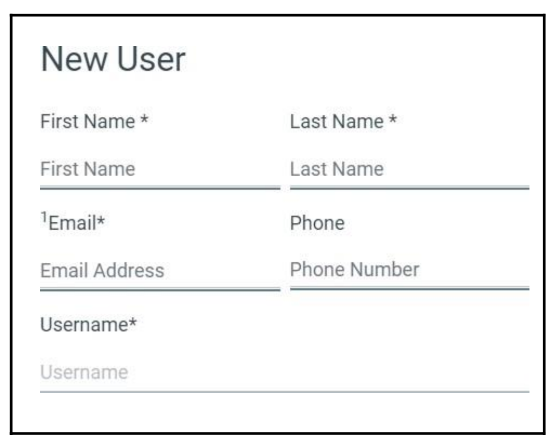
- In order to use the enhanced WEInsights for Salesforce, It is required that each WE user's WE username should match their Salesforce email address. Additionally, the WE users need to have the Salesforce Connector – Professional seat in WE.
- The first step is to ensure that these two items are set up for your users within the WE admin portal. To access your admin portal, log into your WealthEngine account, click on your name in the top right corner, and select "Account" from the drop-down menu, on the left click on Manage Account. If you have never used the WE admin feature before, we suggest watching a brief intro video to get yourself acquainted.



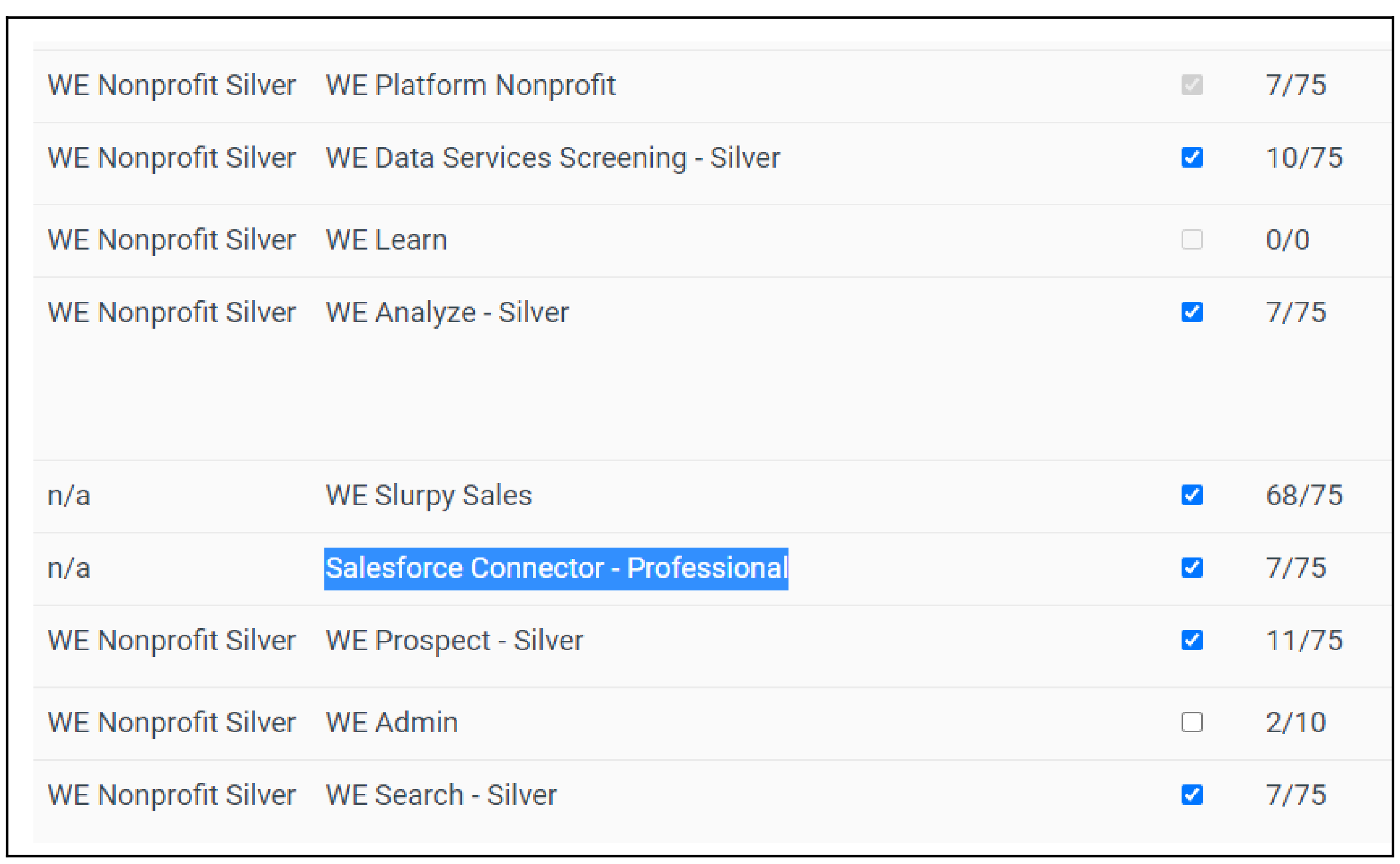
1. Take a look at your users. Do their usernames match the emails of the SF users who will be using the integration with WE? It is important that these match in order to establish a connection between the two systems. If needed, you can edit a WE username to match the SF email by clicking on the user and then editing their profile.



2. If you have not created all of your WE users yet, you can do so by using the "New User" button and entering the required information.



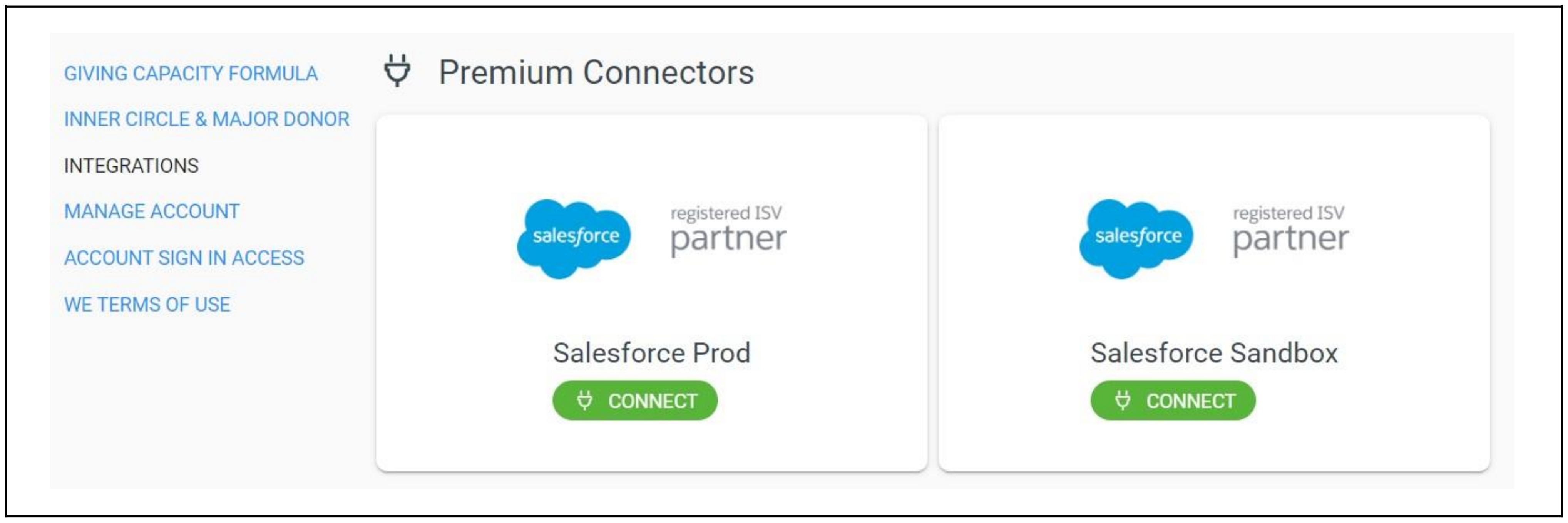
3. Once your usernames are squared away, you will need to provision each user with the new Salesforce Connector-Professional plan. While your account will have automatically been assigned the new plan, it has yet to be assigned to users. To assign the plan to a user, click on the user and check the box next to the Salesforce Connector plan & Save



WE Nonprofit Silver	WE Platform Nonprofit	☑	7/75
WE Nonprofit Silver	WE Data Services Screening - Silver	☑	10/75
WE Nonprofit Silver	WE Learn	☐	0/0
WE Nonprofit Silver	WE Analyze - Silver	☑	7/75
n/a	WE Slurpy Sales	☑	68/75
n/a	Salesforce Connector - Professional	☑	7/75
WE Nonprofit Silver	WE Prospect - Silver	☑	11/75
WE Nonprofit Silver	WE Admin	☐	2/10
WE Nonprofit Silver	WE Search - Silver	☑	7/75

WE Admin Step 2

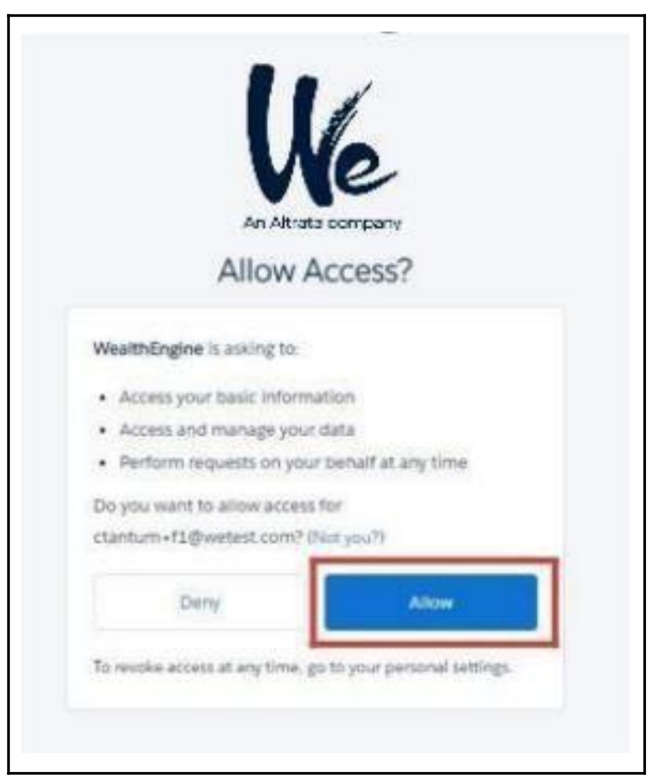
1. The admin will need to log in to their WE account and select Account from the drop-down menu after clicking on their name in the top right corner and click on "Integrations"



2. On the next page, click on the “Connect" button under either the Production or Sandbox Salesforce link, depending on which account you are trying to connect to.

3. If you are not already logged into Salesforce, you will be prompted to log in to the account you want to connect to.

4. Once you are logged into Salesforce, click on the "Allow" button to grant WealthEngine the necessary access for our app.



Test WE Insights for Salesforce,

Follow these steps:

1. Log in to Salesforce as a user who has access to WealthEngine and whose WealthEngine account has been set up as described in the previous section. In either Lightning or Classic view, navigate to a Lead, Contact, or Person Account record.

2. Click the "Get Current Results" button, located either at the top of the page or in the Visualforce section.

3. If the connection is properly authenticated, a new result with WealthEngine data will be returned. If not, you will receive an error message saying "Sorry, you do not have access to this service.

	Created Date	P2G Score	P2G Description	Wealth Score	Gift Capacity Range	Est. Annual Donations	Net Worth	Total Asset
View | Del	05/08/2023	1|0	1|0 - Excellent	95	$5MM+	$50K-$100K	$25MM-$50MM	$25MM-$5

Custom Permissions by Profile/User

Tab Settings:

Our package includes two WealthEngine tabs: **WealthEngine Configuration** and **WealthEngine**. The WealthEngine tab enables users to connect to the WealthEngine platform for searching and prospecting. This tab should be default on for all WE users unless you have some read-only users. In that case, it's preferable to turn that tab as **default off** because none of the buttons will work for the user and they will receive error messages.

On the other hand, the **WealthEngine Configuration** tab allows for the auto-append and context mapping functions explained earlier in this document. This tab should only be default on for the system administrator and possibly a WE admin. To toggle tabs on and off, you can do it from the profile or permission set level. Simply go to Setup > Manage Users > Profiles > Custom Tab Settings > WealthEngine.

Read-only users

The Read-Only User option in Salesforce enables users to view and generate reports on WealthEngine data within the platform, but restricts them from accessing new data or linking to the WealthEngine site through the Research Details button or other buttons on the homepage. If a user attempts to use these features, they will receive a "You do not have access to this service" error message. For this type of user, it is recommended to set both custom tabs to default off as described in the previous section. Additionally, if you are using option 1 (related list), it is best to provide these users with a page layout that does not include the buttons.

List of WE Fields available to map in SF

The attached word file contains the list of WE fields that can be mapped in Salesforce,

Field Label	API Name	Data Type	Mapped from WE?	WE Field Name	
Account	WE_FW8_NP__Account__c	Lookup(Account)	NA		
Address Line1	WE_FW8_NP__Address_Line1__c	Text(255)	Yes	locations[0].address.street_line1	
Age Used	WE_FW8_NP__GC_AGE_USED__c	Text(3)	Yes	identity.age	
Aircraft Owners	WE_FW8_NP__AIR_QOM_STR__c	Picklist	No		
Airplane Owner	WE_FW8_NP__AircraftOwner__c	Picklist	Yes	Yes/No	
Amount	WE_FW8_NP__d_amount__c	Number(3, 0)	No		
Annuity	WE_FW8_NP__ANNUITY__c	Text(100)	Yes	0/1/2	
Bequest	WE_FW8_NP__BEQUEST__c	Text(10)	Yes	Yes/No	
Board Member	WE_FW8_NP__BoardMember__c	Picklist	Yes	Yes/No	
Boat Owner	WE_FW8_NP__BoatOwner__c	Picklist	Yes	Yes/No	
Business/Organanization Name	WE_FW8_NP__Business_Organanization_Name__c	Text(100)	Yes	bus+"["+bus_loc+"].org_name	
Business/Organziation Type	WE_FW8_NP__Business_Organziation_Type__c	Text(100)	Yes	bus+"["+bus_loc+"].org_type.text	
Business Address	WE_FW8_NP__Business_Address__c	Text(100)	Yes	bus+"["+bus_loc+"].address.postal_code	
Business Email	WE_FW8_NP__Business_Email__c	Text(100)	Yes	.emailsBusiness[0].email	
Business Phone	WE_FW8_NP__Business_Phone__c	Text(100)	Yes	identity.phonesBusiness[0].phone	
Business Title	WE_FW8_NP__Business_Title__c	Text(255)	Yes	bus+"["+bus_loc+"].title	
Campaign	WE_FW8_NP__Campaign__c	Lookup(Campaign)	NA		
Cash on Hand	WE_FW8_NP__LiquidityRange__c	Text(100)	Yes	wealth.cash_on_hand.text	
Cash on Hand Rating	WE_FW8_NP__LiquidityRating__c	Text(100)	Yes	wealth.cash_on_hand.value	
Charitable Contributions	WE_FW8_NP__NPOGiveRange__c	Text(100)	Yes	giving.charitable_donations.text	
Charitable Contributions Rating	WE_FW8_NP__NPOGiveRating__c	Text(100)	Yes	giving.charitable_donations.value	
Children Flag	WE_FW8_NP__Children_Flag__c	Picklist	Yes	demographics.has_children	
City	WE_FW8_NP__City__c	Text(50)	Yes	demographics.has_children	
Company Ownership Value	WE_FW8_NP__DbCompanyValueRange__c	Text(100)	Yes	wealth.business_ownership.text	
Company Ownership Value Rating	WE_FW8_NP__DbCompanyValueRating__c	Text(100)	Yes	wealth.business_ownership.value	
Company Sales Volume	WE_FW8_NP__BsnsSalesVolume__c	Text(100)	Yes	wealth.business_sales_volume.text	
Company Sales Volume Rating	WE_FW8_NP__BsnsSalesVolRating__c	Text(100)	Yes	wealth.business_sales_volume.value	
Contact	WE_FW8_NP__Contact__c	Lookup(Contact)	NA		
Direct Stock Holdings	WE_FW8_NP__DirectStockRange__c	Text(100)	Yes	wealth.stock_holdings_direct.text	
Direct Stock Value Rating	WE_FW8_NP__DirectStockValueRating__c	Text(100)	yes	wealth.stock_holdings_direct.value	
Estimated Annual Donation Rating	WE_FW8_NP__EADRating__c	Text(100)	yes	giving.estimated_annual_donations.value	
Estimated Annual Donations	WE_FW8_NP__EAD__c	Text(100)	yes	giving.estimated_annual_donations.text	
Gender	WE_FW8_NP__Gender__c	Picklist	yes	identity.gender.text	
Gift Capacity Giving Rating	WE_FW8_NP__GcGiftRatingNumber__c	Formula (Number)	NA	NA	
Gift Capacity Giving Rating	WE_FW8_NP__GcGiftRating__c	Text(100)	Yes	giving.egc_component.gcGiftRating	
Gift Capacity Income Rating	WE_FW8_NP__GcIncomeRatingNumber__c	Formula (Number)	NA		
Gift Capacity Income Rating	WE_FW8_NP__GcIncomeRating__c	Text(100)	Yes	giving.egc_component.gcIncome	
Gift Capacity Pension Rating	WE_FW8_NP__GcPensionRatingNumber__c	Formula (Number)	NA		
Gift Capacity Pension Rating	WE_FW8_NP__GcPensionRating__c	Text(100)	yes	giving.egc_component.gcPesions	
Gift Capacity Range	WE_FW8_NP__GiftCapacityRange__c	Text(100)	Yes	giving.gift_capacity.text	
Gift Capacity Rating	WE_FW8_NP__GivingCapacityRatingNumber__c	Formula (Number)	NA		
Gift Capacity Rating	WE_FW8_NP__GivingCapacityRating__c	Text(100)	Yes	giving.gift_capacity.value	
Gift Capacity Real Estate Rating	WE_FW8_NP__GcRealEstateRatingNumber__c	Formula (Number)	NA		
Gift Capacity Real Estate Rating	WE_FW8_NP__GcRealEstateRating__c	Text(100)	Yes	giving.egc_component.gcRealEstate	
Gift Capacity Stock Rating	WE_FW8_NP__GcStockRating__c	Text(100)		giving.egc_component.gcStocks	
GuideStar Directors	WE_FW8_NP__GS_QOM_STR__c	Picklist	No		
ID	WE_FW8_NP__ORIGINAL_ID__c	Text(100)	No		
Inclination: Affiliation	WE_FW8_NP__inclinationAffil__c	Text(100)	Yes	giving.affiliation_inclination.text	
Income	WE_FW8_NP__IncomeRange__c	Text(100)	Yes	wealth.total_income.text	
Income Rating	WE_FW8_NP__IncomeRating__c	Text(100)	Yes	wealth.total_income.value	
Influence Quartile	WE_FW8_NP__Influence_Quartile__c	Formula (Text)	NA		
Influence Quartile Text	WE_FW8_NP__Influence_Quartile_Text__c	Text(255)	No		
Influence Rating	WE_FW8_NP__INFLUENCE_RATING__c	Text(100)	Yes	wealth.influence_rating.value	
Inner Circle Match	WE_FW8_NP__InnerCircle_Match__c	Checkbox		ic_match	
Lead	WE_FW8_NP__Lead__c	Lookup(Lead)	Yes		
Marital Status	WE_FW8_NP__Marital_Status__c	Text(100)		identity.marital_status.text	
Match Found	WE_FW8_NP__Match_Found__c	Checkbox			
Most Recent Flag	WE_FW8_NP__Most_Recent_Flag__c	Text(1)	Yes	Y	
Name	WE_FW8_NP__Name__c	Text(100)	Yes	identity.full_name	
Net Worth	WE_FW8_NP__NetworthRange__c	Text(100)	Yes	wealth.networth.text	
Net Worth Rating	WE_FW8_NP__NetworthRating__c	Text(100)	Yes	wealth.networth.value	
P2G	WE_FW8_NP__P2G_COMBO__c	Text(81)	Yes	giving.p2g_score.value	
P2G Description	WE_FW8_NP__P2G_Description__c	Text(100)	Yes	giving.p2g_score.text	
P2G SCORE	WE_FW8_NP__P2G_SCORE__c	Text(40)	Yes	giving.p2g_score.value	
P2G SCORE2	WE_FW8_NP__P2G_SCORE2__c	Text(40)	Yes	giving.p2g_score.value	
Pension	WE_FW8_NP__PensionRange__c	Text(100)	Yes	wealth.total_pensions.text	
Pension Rating	WE_FW8_NP__PensionRating__c	Text(100)	Yes	wealth.total_pensions.value	
Personal Email	WE_FW8_NP__Personal_Email__c	Text(100)	Yes	identity.emailsPersonal[0].email	
Personal Phone	WE_FW8_NP__Personal_Phone__c	Text(100)	Yes	identity.phonesPersonal[0].phone	locations[
Political Contributions	WE_FW8_NP__FEC_TOT__c	Text(100)	Yes	giving.total_political_donations.text	
Political Contributions Rating	WE_FW8_NP__Political_Contributions_Rating__c	Text(100)	Yes	giving.total_political_donations.value	
Postal Code	WE_FW8_NP__Postal_Code__c	Text(10)	Yes	locations[0].address.postal_code	
Property Count	WE_FW8_NP__REAL_ESTATE_COUNT__c	Text(100)	Yes	realestate.total_num_properties	
Real Estate Actual Value	WE_FW8_NP__TotalRealEstateValue__c	Number(18, 0)	Yes	realestate.total_realestate_value.actual_value	
Real Estate Value	WE_FW8_NP__REAL_ESTATE_VALUE__c	Text(100)	Yes	realestate.total_realestate_value.text	
Real Estate Value Rating	WE_FW8_NP__RealEstateValueRating__c	Text(100)	Yes	realestate.total_realestate_value.value	
Related Record	WE_FW8_NP__Related_Record__c	Formula (Text) This formula	NA		
Requested Initiator	WE_FW8_NP__Requested_Initiator__c	Email	NA		
Spouse Name	WE_FW8_NP__Spouse_Name__c	Text(100)	Yes	relationship.spouse.full_name	
State	WE_FW8_NP__State__c	Text(100)	Yes	locations[0].address.state.text	
Stock Actual Value	WE_FW8_NP__TotalStock__c	Number(18, 0)	Yes	wealth.total_stock.actual_value	
Stock - Indirect Holdings	WE_FW8_NP__Stock_Indirect_Holdings__c	Text(100)	Yes	wealth.stock_holdings_indirect.text	
Total Assets	WE_FW8_NP__AssetRange__c	Text(100)	Yes	wealth.total_assets.text	
Total Assets Rating	WE_FW8_NP__AssetRating__c	Text(100)	Yes	wealth.total_assets.value	
Total Gift Capacity Actual Value	WE_FW8_NP__EstimatedGivingCapacity__c	Number(18, 0)	Yes	giving.gift_capacity.actual_value	
Total Stock Value	WE_FW8_NP__TotalStockRange__c	Text(100)	Yes	wealth.total_stock.text	
Total Stock Value Rating	WE_FW8_NP__TotalStockValueRating__c	Text(100)	Yes	wealth.total_stock.value	
Trust	WE_FW8_NP__TRUST__c	Text(100)	Yes	0 or 1 or 2	
WE_REC_ID	WE_FW8_NP__WE_REC_ID__c	Text(15)	No		
WE_RUN_ID	WE_FW8_NP__WE_RUN_ID__c	Text(15)	No		
WealthID Securities	WE_FW8_NP__DISC_QOM_STR__c	Picklist	No		
Wealth Score	WE_FW8_NP__WealthScore__c	Number(4, 0)	Yes	wealth.wealth_score.value	
WealthScore Description	WE_FW8_NP__WealthScore_Description__c	Text(20)	Yes	wealth.wealth_score.text	