

Outlook Field Mapping – AdvisorEngine

Outlook Field Name	CRM Field Name	CRM Type
Initials	Person_1_Initials	
JobTitle	Person_1_Job_Title	
Categories	Classification	
JxOwner	OwnerGroupID	
ClientID	ClientID	
CustomerID	ClientID	
LastModificationTime	LastUpdate	
SelectedMailingAddress	IsPrimary	
Title	Person_1_Prefix	
FirstName	Person_1_First_Name	
MiddleName	Person_1_Middle_Name	
LastName	Person_1_Last_Name	
Nickname	Person_1_Nickname	
Spouse	Person_2_First_Name	
BusinessAddressStreet	Person_1_Street_1	
BusinessAddressPostOfficeBox	Person_1_Street_2	
BusinessAddressState	Person_1_State	
BusinessAddressPostalCode	Person_1_Zip	
BusinessAddressCountry	Person_1_Country	
HomeAddressStreet	Record_Street1	
HomeAddressPostOfficeBox	Record_Street2	
HomeAddressCity	Record_City	
HomeAddressState	Record_State	
HomeAddressPostalCode	Record_Zip	
HomeAddressCountry	Record_Country	
OtherAddressStreet	Person_2_Street_1	
OtherAddressPostOfficeBox	Person_2_Street_2	
OtherAddressCity	Person_2_City	
OtherAddressState	Person_2_State	
OtherAddressPostalCode	Person_2_Zip	
OtherAddressCountry	Person_2_Country	
BusinessFaxNumber	PhoneNumber (Person 1 Only)	Business Fax
BusinessTelephoneNumber	PhoneNumber (Person 1 Only)	Business
Business2TelephoneNumber	PhoneNumber (Person 1 Only)	Business2
CallbackTelephoneNumber	PhoneNumber (Person 1 Only)	Callback
CarTelephoneNumber	PhoneNumber (Person 1 Only)	Car
MobileTelephoneNumber	PhoneNumber (Person 1 Only)	Cell
CompanyMainTelephoneNumber	PhoneNumber (Person 1 Only)	Company Main
HomeFaxNumber	PhoneNumber (Person 1 Only)	Home Fax
HomeTelephoneNumber	PhoneNumber (Person 1 Only)	Home

Home2TelephoneNumber	PhoneNumber (Person 1 Only)	Home2
ISDNNumber	PhoneNumber (Person 1 Only)	ISDN
OtherFaxNumber	PhoneNumber (Person 1 Only)	Other Fax
OtherTelephoneNumber	PhoneNumber (Person 1 Only)	Other
PagerNumber	PhoneNumber (Person 1 Only)	Pager
PrimaryTelephoneNumber	Record_Phone	
RadioTelephoneNumber	PhoneNumber (Person 1 Only)	Radio
TTYTTDTelephoneNumber	PhoneNumber (Person 1 Only)	TTYTDD
TelexNumber	PhoneNumber (Person 1 Only)	Telex
AssistantName	Person_1_Assistants_Name	
AssistantTelephoneNumber	Person_1_Assistant_Phone	
Birthday	Person_1_DOB	
Email1Address	Record_Email	
Email2Address	Person_1_Email_Home	
Email3Address	Person_2_Email_Home	
Profession	Person_1_Occupation	