



DISCOVERY DATA MARKETLINK
FOR SALESFORCE

Field Mappings

For *salesforce.com* Administrators





Accounts



Discovery Data MarketLink for Salesforce Field Mappings

FIELD	DISCOVERY DATA TYPE	SALESFORCE DATA TYPE (RECOMMENDED)
Accounts		
Discovery Data fields can be mapped to multiple Salesforce fields. Discovery Data fields cannot be mapped to custom objects.		
Select one required field below to map to Discovery Data Firm CRD/Branch ID. After initial setup this mapping cannot be changed without support from Discovery Data.		
Note: If Firm CRD is selected Firm Name will automatically map to Account Name.		
Firm CRD (Required)	int(10)	text(10)
Discovery Physical Branch ID (Required) OR Discovery Branch ID (Required)	varchar(28)	text(28)
Select one required field below to map to Account Name. After initial setup this mapping cannot be changed without support from Discovery Data.		
Firm Name (Required)	varchar(150)	standard Name field or text(150)
Discovery Branch Name (Required) OR Discovery Alternative Branch Name (Required)	varchar(200)	standard Name field or text(200)
Select all that apply on Discovery Data Mapping.		
Discovery Physical Address ID	int(10)	text(10)
Office Address ID	int(10)	text(10)
Office Street Address (combines Office Address 1 & 2)	varchar(400)	standard Billing Street or text(255)
Office Address 1 (option if Office Street Address is not selected)	varchar(200)	text(200)
Office Address 2 (option if Office Street Address is not selected)	varchar(200)	text(200)
Office City	varchar(200)	standard Billing City or text(200)
Office State	varchar(2)	standard Billing State/Province or text(2)
Office Zip Code	varchar(5)	standard Billing Zip/Postal Code or text(5)
Office Zip Code +4	varchar(4)	text(4)
Office Metro Area	varchar(100)	text(100)
Office County	varchar(50)	text(50)
Office Country	varchar(50)	standard Billing Country or text(50)
Office Latitude	numeric(21,5)	standard Billing Latitude or geolocation(7 decimals)
Office Longitude	numeric(21,5)	standard Billing Longitude or geolocation(7 decimals)
Office USPS Certified	bit	checkbox or text(3)
Office Geo Location URL	varchar(255)	url(255)
Office Phone	varchar(25)	standard Phone or phone
Office Do Not Call	bit	checkbox or text(3)
Firm Website	varchar(200)	standard Website or url(255)
LinkedIn	varchar(200)	long text area(2,000)
Facebook	varchar(200)	long text area(2,000)
Twitter	varchar(200)	long text area(2,000)
YouTube	varchar(200)	long text area(2,000)
RIA Types	varchar(8,000)	long text area(8,000)
BD Types	varchar(8,000)	long text area(8,000)
Primary BD Type	varchar(100)	text(100)
Ownership Type	varchar(11)	standard Ownership or text(11)
Total Assets (\$mil)	double(20,6)	currency(12,6)
Total Accounts	int(10)	number(10,0)
Discretionary Assets (\$mil)	double(20,6)	currency(12,6)
Discretionary Accounts	int(11)	number(10,0)
Non-Discretionary Assets (\$mil)	double(20,6)	currency(12,6)

Discovery Data MarketLink for Salesforce Field Mappings

FIELD	DISCOVERY DATA TYPE	SALESFORCE DATA TYPE (RECOMMENDED)
Non-Discretionary Accounts	int(11)	number(10,0)
Average Account Size	numeric(20,0)	currency(18,0) or number(18,0)
% Assets - HNWI Individuals	varchar(50)	text(50)
% Assets - Individuals	varchar(50)	text(50)
% Assets - Investment Companies	varchar(50)	text(50)
% Assets - Other Investment Advisers	varchar(50)	text(50)
% Assets - Retirement Plans	varchar(50)	text(50)
Investments - ETFs	bit	checkbox or text(3)
Investments - Hedge Funds	bit	checkbox or text(3)
Investments - Mutual Funds	bit	checkbox or text(3)
Investments - Variable Annuities	bit	checkbox or text(3)
Services - Selection of Other Advisers	smallint	checkbox or text(3)
# of BD Reps	int(10)	number(10,0)
# of Employees	int(10)	number(10,0)
# of Investment Advisory Clients	varchar(50)	text(50)
# of RIA Reps	numeric(18,0)	number(18,0)
Dually Registered BD-RIA Firm	varchar(3)	checkbox or text(3)
Firm Registration Type	varchar(15)	text(15)
Affiliated Broker-Dealer Name 1	varchar(150)	text(150)
Affiliated BD Firm CRD 1	varchar(22)	text(22)
Affiliated Broker-Dealer Name 2	varchar(150)	text(150)
Affiliated BD Firm CRD 2	varchar(22)	text(22)
Affiliated RIA Name 1	varchar(150)	text(150)
Affiliated RIA Firm CRD 1	varchar(22)	text(22)
Affiliated RIA Name 2	varchar(150)	text(150)
Affiliated RIA Firm CRD 2	varchar(22)	text(22)
Clearing Firm 1	varchar(150)	text(150)
Clearing Firm 2	varchar(150)	text(150)
Custodian 1	varchar(80)	text(80)
Custodian 2	varchar(80)	text(80)
Custodian 3	varchar(80)	text(80)
Date ADV Last Amended	date	date
Regulatory Disclosures	tinyint(1)	checkbox or text(3)
Total Disclosures	int(6)	number(10,0)
Q4 Total Assets (\$mil) - 2008	decimal(40,20)	currency(12,4)
Q4 Total Assets (\$mil) - 2009	decimal(40,20)	currency(12,4)
Q4 Total Assets (\$mil) - 2010	decimal(40,20)	currency(12,4)
Q4 Total Assets (\$mil) - 2011	decimal(40,20)	currency(12,4)
Q4 Total Assets (\$mil) - 2012	decimal(40,20)	currency(12,4)
Q4 Total Assets (\$mil) - 2013	decimal(40,20)	currency(12,4)
Q4 Total Assets (\$mil) - 2014	decimal(40,20)	currency(12,4)
Q4 Total Assets (\$mil) - 2015	decimal(40,20)	currency(12,4)

Discovery Data MarketLink for Salesforce Field Mappings

FIELD	DISCOVERY DATA TYPE	SALESFORCE DATA TYPE (RECOMMENDED)
Q4 Total Assets (\$mil) - 2016	decimal(40,20)	currency(12,4)
Q4 Total Assets (\$mil) - 2017	decimal(40,20)	currency(12,4)
Q4 Total Assets (\$mil) - 2018	decimal(40,20)	currency(12,4)
Q4 Total Assets (\$mil) - 2019	decimal(40,20)	currency(12,4)
Q4 Total Assets (\$mil) - 2020	decimal(40,20)	currency(12,4)
Q4 Total Assets (\$mil) - 2021	decimal(40,20)	currency(12,4)
1-Year AUM Growth Rate	decimal(15,1)	number(14,1)
5-Year AUM Growth Rate	decimal(15,1)	number(14,1)
Custodian Assets (\$mil) - Fidelity/NationalFinancial	decimal(20,6)	currency(12,6)
Custodian Assets (\$mil) - Interactive Brokers	decimal(20,6)	currency(12,6)
Custodian Assets (\$mil) - Pershing	decimal(20,6)	currency(12,6)
Custodian Assets (\$mil) - Schwab	decimal(20,6)	currency(12,6)
Custodian Assets (\$mil) - TD Ameritrade	decimal(20,6)	currency(12,6)
Assets (\$mil) - Banks	decimal(20,6)	currency(12,6)
Assets (\$mil) - Business Development Companies	decimal(20,6)	currency(12,6)
Assets (\$mil) - Charities	decimal(20,6)	currency(12,6)
Assets (\$mil) - Corporations	decimal(20,6)	currency(12,6)
Assets (\$mil) - HNW Individuals	decimal(20,6)	currency(12,6)
Assets (\$mil) - Individuals	decimal(20,6)	currency(12,6)
Assets (\$mil) - Insurance Companies	decimal(20,6)	currency(12,6)
Assets (\$mil) - Investment Companies	decimal(20,6)	currency(12,6)
Assets (\$mil) - Municipalities	decimal(20,6)	currency(12,6)
Assets (\$mil) - Other - RIA Firm Assets Under Management	decimal(20,6)	currency(12,6)
Assets (\$mil) - Other Investment Advisers	decimal(20,6)	currency(12,6)
Assets (\$mil) - Other Pooled Vehicles	decimal(20,6)	currency(12,6)
Assets (\$mil) - Retirement Plans	decimal(20,6)	currency(12,6)
Assets (\$mil) - Sovereign or Foreign	decimal(20,6)	currency(12,6)
Assets (\$mil) - Bonds Investment Grade Corporate	decimal(20,6)	currency(12,6)
Assets (\$mil) - Bonds Municipal	decimal(20,6)	currency(12,6)
Assets (\$mil) - Bonds Non-Investment Grade Corporate	decimal(20,6)	currency(12,6)
Assets (\$mil) - Bonds Sovereign	decimal(20,6)	currency(12,6)
Assets (\$mil) - Bonds US Government Agency	decimal(20,6)	currency(12,6)
Assets (\$mil) - Cash and Equivalents	decimal(20,6)	currency(12,6)
Assets (\$mil) - Derivatives	decimal(20,6)	currency(12,6)
Assets (\$mil) - Equity Exchange Traded Equity	decimal(20,6)	currency(12,6)
Assets (\$mil) - Equity Non-Exchange Traded Equity	decimal(20,6)	currency(12,6)
Assets (\$mil) - Mutual Funds	decimal(20,6)	currency(12,6)
Assets (\$mil) - Other - Separately Managed Account Clients	decimal(20,6)	currency(12,6)
Assets (\$mil) - Private Funds	decimal(20,6)	currency(12,6)
# of Clients - Banks	varchar(10)	text(10)
# of Clients - Business Development Companies	varchar(10)	text(10)
# of Clients - Charities	varchar(10)	text(10)

Discovery Data MarketLink for Salesforce Field Mappings

FIELD	DISCOVERY DATA TYPE	SALESFORCE DATA TYPE (RECOMMENDED)
# of Clients - Corporations	varchar(10)	text(10)
# of Clients - HNW Individuals	varchar(10)	text(10)
# of Clients - Individuals	varchar(10)	text(10)
# of Clients - Insurance Companies	varchar(10)	text(10)
# of Clients - Investment Companies	varchar(10)	text(10)
# of Clients - Municipalities	varchar(10)	text(10)
# of Clients - Other	varchar(10)	text(10)
# of Clients - Other Investment Advisers	varchar(10)	text(10)
# of Clients - Other Pooled Vehicles	varchar(10)	text(10)
# of Clients - Retirement Plans	varchar(10)	text(10)
# of Clients - Sovereign or Foreign	varchar(10)	text(10)

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Contacts



Discovery Data MarketLink for Salesforce Field Mappings

FIELD	DISCOVERY DATA TYPE	SALESFORCE DATA TYPE (RECOMMENDED)
Contacts		
Discovery Data fields can be mapped to multiple Salesforce fields. Discovery Data fields cannot be mapped to custom objects.		
Select all that apply on Discovery Data Mapping.		
Rep CRD (Required)	int(10)	text(10)
First Name	varchar(100)	standard First Name or text(100)
Middle Name	varchar(100)	standard Middle Name (enable in Salesforce settings) or text(100)
Last Name (Required)	varchar(100)	standard Last Name or text(100)
Suffix	varchar(100)	standard Suffix (enable in Salesforce settings) or text(100)
Preferred Name	varchar(100)	text(100)
Firm CRD	int(10)	text(10)
Discovery Physical Branch ID	varchar(28)	text(28)
Discovery Branch ID	varchar(28)	text(28)
Firm Name	varchar(500)	text(150)
Branch Address ID	int(10)	text(10)
Discovery Physical Address ID	int(10)	text(10)
NPN	int(11)	text(10)
Primary Firm CRD	int(10)	text(10)
Primary RIA Firm CRD	int(10)	text(10)
Primary BD Firm CRD	int(10)	text(10)
Firm Website	varchar(200)	url(255)
LinkedIn	text	long text area(2,000)
Facebook	text	long text area(2,000)
Twitter	text	long text area(2,000)
YouTube	text	long text area(2,000)
Discovery Branch Name	varchar(200)	text(200)
Discovery Alternative Branch Name	varchar(200)	text(200)
Branch Street Address (combines Branch Address 1 & 2)	varchar(400)	standard Mailing Street or text(255)
Branch Address 1 (option if Branch Street Address is not selected)	varchar(200)	text(200)
Branch Address 2 (option if Branch Street Address is not selected)	varchar(200)	text(200)
Branch City	varchar(100)	standard Mailing City or text(200)
Branch County	varchar(50)	text(50)
Branch State	varchar(2)	standard Mailing State/Province or text(2)
Branch Metro Area	varchar(100)	text(100)
Branch Zip Code	varchar(5)	standard Mailing Zip/Postal Code or text(5)
Branch Zip Code +4	varchar(4)	text(4)
Branch Country	varchar(50)	standard Mailing Country or text(50)
Branch Longitude	numeric(21,5)	standard Mailing Longitude or geolocation(7 decimals)
Branch Latitude	numeric(21,5)	standard Mailing Latitude or geolocation(7 decimals)
Branch Address USPS Certified	bit	checkbox or text(3)
Branch Geo Location URL	varchar(255)	url(255)

Discovery Data MarketLink for Salesforce Field Mappings

FIELD	DISCOVERY DATA TYPE	SALESFORCE DATA TYPE (RECOMMENDED)
Branch Phone	varchar(20)	standard Phone or phone
Branch Do Not Call	bit	checkbox or text(3)
BD Titles	varchar(8,000)	long text area(8,000)
BD Title Categories	varchar(8,000)	long text area(8,000)
RIA Titles	varchar(8,000)	long text area(8,000)
RIA Title Categories	varchar(8,000)	long text area(8,000)
Personal Website	varchar(255)	url(255)
DBA Name	varchar(150)	text(150)
Email - Business Type	varchar(75)	standard Email or email
Email - Business Type Validation Supported	bit	checkbox or text(3)
Email - Business 2 Type	varchar(75)	email
Email - Business 2 Type Validation Supported	bit	checkbox or text(3)
Email - Personal	varchar(75)	standard Email or email
Email - Personal Validation Supported	bit	checkbox or text(3)
Success Likelihood	varchar(50)	text(50)
Advisor Success Level	decimal(2,1)	number(1,1)
Advisor Success Level - Quintile	int(5)	number(1,0)
Advisor Success Level - Confidence Score	decimal(4,1)	percent(3,1)
Dually Registered BD-RIA Rep	bit	checkbox or text(3)
Licenses and Designations	varchar(8,000)	long text area(8,000)
Insurance Licensed	bit	checkbox or text(3)
# of Registered States	numeric(18,0)	number(18,0)
Non-Advisor	varchar(7)	checkbox or text(3)
AUM - Self Reported	varchar(50)	text(50)
Production - Self Reported	varchar(50)	text(50)
Total Assets (\$mil)	double(20,6)	currency(12,6)
Discretionary Assets (\$mil)	double(20,6)	currency(12,6)
Discretionary Accounts	int(11)	number(10,0)
Non-Discretionary Assets (\$mil)	double(20,6)	currency(12,6)
Non-Discretionary Accounts	int(11)	number(10,0)
Custodian Assets (\$mil) - Fidelity/NationalFinancial	decimal(20,6)	currency(12,6)
Custodian Assets (\$mil) - Interactive Brokers	decimal(20,6)	currency(12,6)
Custodian Assets (\$mil) - Pershing	decimal(20,6)	currency(12,6)
Custodian Assets (\$mil) - Schwab	decimal(20,6)	currency(12,6)
Custodian Assets (\$mil) - TD Ameritrade	decimal(20,6)	currency(12,6)
Independent Contractor	bit	checkbox or text(3)
Firm Registration Type	varchar(15)	text(15)
Team ID	int(10)	text(10)
Team Name	varchar(200)	text(200)
Regulatory Disclosures	bit	checkbox or text(3)
Total Disclosures	int(4)	number(10,0)
Miles To Work	float(53)	number(12,6)

Discovery Data MarketLink for Salesforce Field Mappings

FIELD	DISCOVERY DATA TYPE	SALESFORCE DATA TYPE (RECOMMENDED)
Date of Birth - Full	date	standard Birthdate or date
Gender	varchar(10)	text(10)
Education 1	varchar(255)	text(255)
Education 2	varchar(255)	text(255)
Education 3	varchar(255)	text(255)
Language 1	varchar(100)	text(100)
Language 2	varchar(100)	text(100)
Language 3	varchar(100)	text(100)
Military Branch	varchar(100)	text(100)
Military Service	varchar(7)	checkbox or text(3)
Date Became a Rep - MM_DD_YYYY	date	date
Date of Hire at Current Firm - Full	date	date
Date of Hire at Current Firm - Year	int(4)	text(4)
Prior Firm 1	varchar(150)	text(150)
Prior Firm 1 Firm CRD	int(10)	text(10)
Start Date 1	date	date
End Date 1	date	date
Prior Firm 2	varchar(150)	text(150)
Prior Firm 2 Firm CRD	int(10)	text(10)
Start Date 2	date	date
End Date 2	date	date
Prior Firm 3	varchar(200)	text(150)
Prior Firm 3 Firm CRD	int(10)	text(10)
Start Date 3	date	date
End Date 3	date	date
Home Address ID	int(10)	text(10)
Home Street Address (combines Home Address 1 & 2)	varchar(400)	standard Other Street or text(255)
Home Address 1 (option if Home Street Address is not selected)	varchar(200)	text(200)
Home Address 2 (option if Home Street Address is not selected)	varchar(200)	text(200)
Home City	varchar(200)	standard Other City or text(200)
Home County	varchar(50)	text(50)
Home State	varchar(2)	standard Other State/Province or text(2)
Home Metro Area	varchar(100)	text(100)
Home Zip Code	varchar(5)	standard Other Zip/Postal Code or text(5)
Home Zip Code +4	varchar(4)	text(4)
Home Country	varchar(50)	standard Other Country or text(50)
Home Longitude	numeric(21,5)	standard Other Longitude or geolocation(7 decimals)
Home Latitude	numeric(21,5)	standard Other Latitude or geolocation(7 decimals)
Home USPS Certified	bit	checkbox or text(3)
Home Geo Location URL	varchar(255)	url(255)
Home Phone	varchar(14)	standard Home Phone or phone
Home Do Not Call	bit	checkbox or text(3)

Discovery Data MarketLink for Salesforce Field Mappings

FIELD	DISCOVERY DATA TYPE	SALESFORCE DATA TYPE (RECOMMENDED)
Current BD Firm 1 CRD	int(10)	text(10)
Current BD Firm 1 Name	varchar(150)	text(150)
Current BD Firm 2 CRD	int(10)	text(10)
Current BD Firm 2 Name	varchar(150)	text(150)
Current RIA Firm 1 CRD	int(10)	text(10)
Current RIA Firm 1 Name	varchar(150)	text(150)
Current RIA Firm 2 CRD	int(10)	text(10)
Current RIA Firm 2 Name	varchar(150)	text(150)
Current RIA Firm 3 CRD	int(10)	text(10)
Current RIA Firm 3 Name	varchar(150)	text(150)
Current RIA Firm 4 CRD	int(10)	text(10)
Current RIA Firm 4 Name	varchar(150)	text(150)
Current RIA Firm 5 CRD	int(10)	text(10)
Current RIA Firm 5 Name	varchar(150)	text(150)
# of Firm Associations	int(3)	number(10,0)
Breakaway Date	date	date
Breakaway Rep - Former BD Name	varchar(150)	text(150)



Leads



Discovery Data MarketLink for Salesforce Field Mappings

FIELD	DISCOVERY DATA TYPE	SALESFORCE DATA TYPE (RECOMMENDED)
Leads		
Discovery Data fields can be mapped to multiple Salesforce fields. Discovery Data fields cannot be mapped to custom objects.		
Select all that apply on Discovery Data Mapping.		
Rep CRD (Required)	int(10)	text(10)
First Name	varchar(100)	standard First Name or text(100)
Middle Name	varchar(100)	standard Middle Name (enable in Salesforce settings) or text(100)
Last Name (Required)	varchar(100)	standard Last Name or text(100)
Suffix	varchar(100)	standard Suffix (enable in Salesforce settings) or text(100)
Preferred Name	varchar(100)	text(100)
Select one required field below to map to Discovery Data Firm CRD/Branch ID. After initial setup this mapping cannot be changed without support from Discovery Data.		
Firm CRD (Required)	int(10)	text(10)
Discovery Physical Branch ID (Required) OR Discovery Branch ID (Required)	varchar(28)	text(28)
Select all that apply on Discovery Data Mapping.		
Firm Name (Required)	varchar(500)	text(150)
Branch Address ID	int(10)	text(10)
Discovery Physical Address ID	int(10)	text(10)
NPN	int(11)	text(10)
Primary Firm CRD	int(10)	text(10)
Primary RIA Firm CRD	int(10)	text(10)
Primary BD Firm CRD	int(10)	text(10)
Firm Website	varchar(200)	url(255)
LinkedIn	text	long text area(2,000)
Facebook	text	long text area(2,000)
Twitter	text	long text area(2,000)
YouTube	text	long text area(2,000)
Discovery Branch Name	varchar(200)	text(200)
Discovery Alternative Branch Name	varchar(200)	standard Company or text(200)
Branch Street Address (combines Branch Address 1 & 2)	varchar(400)	standard Mailing Street or text(255)
Branch Address 1 (option if Branch Street Address is not selected)	varchar(200)	text(200)
Branch Address 2 (option if Branch Street Address is not selected)	varchar(200)	text(200)
Branch City	varchar(100)	standard Mailing City or text(200)
Branch County	varchar(50)	text(50)
Branch State	varchar(2)	standard Mailing State/Province or text(2)
Branch Metro Area	varchar(100)	text(100)
Branch Zip Code	varchar(5)	standard Mailing Zip/Postal Code or text(5)
Branch Zip Code +4	varchar(4)	text(4)
Branch Country	varchar(50)	standard Mailing Country or text(50)
Branch Longitude	numeric(21,5)	standard Mailing Longitude or geolocation(7 decimals)
Branch Latitude	numeric(21,5)	standard Mailing Latitude or geolocation(7 decimals)
Branch Address USPS Certified	bit	checkbox or text(3)

Discovery Data MarketLink for Salesforce Field Mappings

FIELD	DISCOVERY DATA TYPE	SALESFORCE DATA TYPE (RECOMMENDED)
Branch Geo Location URL	varchar(255)	url(255)
Branch Phone	varchar(20)	standard Phone or phone
Branch Do Not Call	bit	checkbox or text(3)
BD Titles	varchar(8,000)	long text area(8,000)
BD Title Categories	varchar(8,000)	long text area(8,000)
RIA Titles	varchar(8,000)	long text area(8,000)
RIA Title Categories	varchar(8,000)	long text area(8,000)
Personal Website	varchar(255)	url(255)
DBA Name	varchar(150)	text(150)
Email - Business Type	varchar(75)	standard Email or email
Email - Business Type Validation Supported	bit	checkbox or text(3)
Email - Business 2 Type	varchar(75)	email
Email - Business 2 Type Validation Supported	bit	checkbox or text(3)
Email - Personal	varchar(75)	standard Email or email
Email - Personal Validation Supported	bit	checkbox or text(3)
Success Likelihood	varchar(50)	text(50)
Advisor Success Level	decimal(2,1)	number(1,1)
Advisor Success Level - Quintile	int(5)	number(1,0)
Advisor Success Level - Confidence Score	decimal(4,1)	percent(3,1)
Dually Registered BD-RIA Rep	bit	checkbox or text(3)
Licenses and Designations	varchar(8,000)	long text area(8,000)
Insurance Licensed	bit	checkbox or text(3)
# of Registered States	numeric(18,0)	number(18,0)
Non-Advisor	varchar(7)	checkbox or text(3)
AUM - Self Reported	varchar(50)	text(50)
Production - Self Reported	varchar(50)	text(50)
Total Assets (\$mil)	double(20,6)	currency(12,6)
Discretionary Assets (\$mil)	double(20,6)	currency(12,6)
Discretionary Accounts	int(11)	number(10,0)
Non-Discretionary Assets (\$mil)	double(20,6)	currency(12,6)
Non-Discretionary Accounts	int(11)	number(10,0)
Custodian Assets (\$mil) - Fidelity/NationalFinancial	decimal(20,6)	currency(12,6)
Custodian Assets (\$mil) - Interactive Brokers	decimal(20,6)	currency(12,6)
Custodian Assets (\$mil) - Pershing	decimal(20,6)	currency(12,6)
Custodian Assets (\$mil) - Schwab	decimal(20,6)	currency(12,6)
Custodian Assets (\$mil) - TD Ameritrade	decimal(20,6)	currency(12,6)
Independent Contractor	bit	checkbox or text(3)
Firm Registration Type	varchar(15)	text(15)
Team ID	int(10)	text(10)
Team Name	varchar(200)	text(200)
Regulatory Disclosures	bit	checkbox or text(3)
Total Disclosures	int(4)	number(10,0)

Discovery Data MarketLink for Salesforce Field Mappings

FIELD	DISCOVERY DATA TYPE	SALESFORCE DATA TYPE (RECOMMENDED)
Miles To Work	float(53)	number(12,6)
Date of Birth - Full	date	standard Birthdate or date
Gender	varchar(10)	text(10)
Education 1	varchar(255)	text(255)
Education 2	varchar(255)	text(255)
Education 3	varchar(255)	text(255)
Language 1	varchar(100)	text(100)
Language 2	varchar(100)	text(100)
Language 3	varchar(100)	text(100)
Military Branch	varchar(100)	text(100)
Military Service	varchar(7)	checkbox or text(3)
Date Became a Rep - MM_DD_YYYY	date	date
Date of Hire at Current Firm - Full	date	date
Date of Hire at Current Firm - Year	int(4)	text(4)
Prior Firm 1	varchar(150)	text(150)
Prior Firm 1 Firm CRD	int(10)	text(10)
Start Date 1	date	date
End Date 1	date	date
Prior Firm 2	varchar(150)	text(150)
Prior Firm 2 Firm CRD	int(10)	text(10)
Start Date 2	date	date
End Date 2	date	date
Prior Firm 3	varchar(200)	text(150)
Prior Firm 3 Firm CRD	int(10)	text(10)
Start Date 3	date	date
End Date 3	date	date
Home Address ID	int(10)	text(10)
Home Street Address (combines Home Address 1 & 2)	varchar(400)	standard Other Street or text(255)
Home Address 1 (option if Home Street Address is not selected)	varchar(200)	text(200)
Home Address 2 (option if Home Street Address is not selected)	varchar(200)	text(200)
Home City	varchar(200)	standard Other City or text(200)
Home County	varchar(50)	text(50)
Home State	varchar(2)	standard Other State/Province or text(2)
Home Metro Area	varchar(100)	text(100)
Home Zip Code	varchar(5)	standard Other Zip/Postal Code or text(5)
Home Zip Code +4	varchar(4)	text(4)
Home Country	varchar(50)	standard Other Country or text(50)
Home Longitude	numeric(21,5)	standard Other Longitude or geolocation(7 decimals)
Home Latitude	numeric(21,5)	standard Other Latitude or geolocation(7 decimals)
Home USPS Certified	bit	checkbox or text(3)
Home Geo Location URL	varchar(255)	url(255)
Home Phone	varchar(14)	standard Home Phone or phone

Discovery Data MarketLink for Salesforce Field Mappings

FIELD	DISCOVERY DATA TYPE	SALESFORCE DATA TYPE (RECOMMENDED)
Home Do Not Call	bit	checkbox or text(3)
Current BD Firm 1 CRD	int(10)	text(10)
Current BD Firm 1 Name	varchar(150)	text(150)
Current BD Firm 2 CRD	int(10)	text(10)
Current BD Firm 2 Name	varchar(150)	text(150)
Current RIA Firm 1 CRD	int(10)	text(10)
Current RIA Firm 1 Name	varchar(150)	text(150)
Current RIA Firm 2 CRD	int(10)	text(10)
Current RIA Firm 2 Name	varchar(150)	text(150)
Current RIA Firm 3 CRD	int(10)	text(10)
Current RIA Firm 3 Name	varchar(150)	text(150)
Current RIA Firm 4 CRD	int(10)	text(10)
Current RIA Firm 4 Name	varchar(150)	text(150)
Current RIA Firm 5 CRD	int(10)	text(10)
Current RIA Firm 5 Name	varchar(150)	text(150)
# of Firm Associations	int(3)	number(10,0)
Breakaway Date	date	date
Breakaway Rep - Former BD Name	varchar(150)	text(150)