

DASH

USER GUIDE

ASTUTEWHEEL CONNECTOR – PART 2 (Data Mapping)

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Introduction

This user guide will show the detailed mapping of the fields between DASH and AstuteWheel, showing which fields sync, and which fields do not sync.

Document Guide


* - Fields that are marked in asterisk are mandatory fields and must be entered to **sync** to AW.

↓ - This arrow key represents dropdown option.

Underline - Fields that don't exist in AstuteWheel.

 - Sync
















 - Doesn't sync

 - Sync with limitations

Sync DASH to AstuteWheel

The following tables show the detailed mapping of the DASH fields that sync to AstuteWheel fields.

1.0 General Information

DASH Field Name	Sync	AW Field Name	Notes
Title ↓ ()		Title ↓ ()	<u>Professor</u> will sync as "Mr" to AW.
First Name*		First name	This field is required to sync to AW.
Middle Name		-	No equivalent field in AW
Last Name*		Surname	This field is required to sync to AW.
Preferred Name		Preferred name	-
About		-	No equivalent field in AW
Owner ↓ (Contact)		Client	-
Category ↓		-	No equivalent field in AW
Referrer		-	No equivalent field in AW
Email (home)*		Email address	This field is required to sync to AW.
Email (work)		-	No equivalent field in AW
Date of Birth*		Date of birth	This field is required to sync to AW.
Gender ↓ ()		Gender ↓ ()	<u>Unspecified</u> will sync as "Male" to AW.
Phone (mobile) *		Mobile	<u>Country code</u> will not sync to AW.
Phone (home)		Home phone	<u>Country code</u> will not sync to AW.







Phone (work)	✓	Work phone	<u>Country code</u> will not sync to AW.
Address (home)	✓	Residential address	1. <u>Country</u> field will not sync to AW. 2. Non-Australian state will sync as "OTH" to AW. 3. Partner's <u>address</u> will not sync to AW.
Address (postal)	✓	Postal Address	The same as Home Address.
Address (work)	✗	-	No equivalent field in AW

2.0 Personal Details

2.1 Personal Details

DASH Field Name	Sync	AW Field Name	Notes
Date of Death (if Deceased)	✗	-	No equivalent field in AW
Marital Status* ↓ (Married, Divorced, Widowed, Single, De Facto, Engaged, <u>Separated</u> , <u>Unknown</u>)	✓	Relationship status ↓ ()	This field is required to sync to AW. 1. Married = Married (Partner required) 2. Divorced = Divorced 3. Widowed = Widowed 4. Single = Single 5. De Facto = Defacto (Partner required) 6. Engaged = Registered civil partnership (Partner required) 7. <u>Separated</u> = Does not sync (No equivalent field in AW) 8. <u>Unknown</u> = Does not sync (No equivalent field in AW)
Health State ↓ (Excellent, Good, Poor, <u>Permanently Disabled</u>)	✓	Health status ↓ ()	1. Excellent = Excellent 2. Good = Good 3. Poor = Poor 4. <u>Permanently Disabled</u> = Does not sync
Private Health Cover ↓ ()	✓	Private health insurance ↓ ()	-
Smoker ↓ (Yes, No)	✓	Smoker ↓ ()	Yes = Smoker No = Non-smoker
Australian Tax Resident ↓ ()	✗	-	No equivalent field in AW
Retirement Date	✗	-	No equivalent field in AW

2.2 Employment Details

DASH Field Name	Sync	AW Field Name	Notes
Occupation*		Occupation	This field is required to sync to AW.
Job Title		-	No equivalent field in AW
Employer*		Employer	“Employer” field must match with the “Description” field in Income to sync “Gross Salary” and “Bonus”.
Employment Status* ↓ (Full Time, Part Time, Casual, Temp, Contract, Seasonal, Commission, Self Employed, Sole Trader, Not Employed, Retired, Semi-Retired, Unknown)		Employment type ↓ ()	This field is required to sync to AW. <ol style="list-style-type: none"> 1. Full Time = Full-time 2. Part Time = Part-time 3. Casual = Casual 4. Contract = Contractor 5. Self Employed = Self-Employed 6. <u>The Rest</u> = Do not sync
Hours Worked Per Week		Weekly working hours	-
Employment Start Date		-	No equivalent field in AW









2.3 Employment Leave Details

This section does not sync as there is no equivalent fields in AstuteWheel.

2.4 Identity Checks

This section does not sync as there is no equivalent fields in AstuteWheel.

3.0 Dependants

DASH Field Name	Sync	AW Field Name	Notes
Name*		Name	This field is required to sync to AW.
Date of Birth*		Date of birth	This field is required to sync to AW.
-		Gender ↓ (Male, Female)	“Male” by default in AW.
Relationship		-	No equivalent field in AW
-		Year at School ↓ ()	“Completed studies” by default in AW.
Financial Dependant ↓ (Yes, No)		Living at home ↓ (Yes, No)	-
Dependant till Age		-	No equivalent field in AW
Responsible of ↓ (Contact)		-	No equivalent field in AW

4.0 Advice Details

4.1 Reasons for Seeking Advice

This section does not sync as there is no equivalent fields in AstuteWheel.

4.2 Goals

DASH Field Name	Sync	AW Field Name	Notes
Type ↓ ()	✗	Advice Segment ↓ ()	"Income Plan" by default in AW.
Description	✓	Client Stated Goal & Agreed Goal	Only "Agreed Goal" will sync back to DASH.
Status ↓ ()	✓	Active	<u>Cancelled</u> goals will not sync to AW.
Timeframe	✓	Time Scale ↓ (Short, Medium, Long)	Short = 0 Medium = 1 or 2 Long >= 3
Amount \$	✗	-	No equivalent field in AW
Owner ↓ (Contact)	✓	Goal is for ↓ (Contact)	If the contact has a partner, the goals will sync as "Client and Partner".
Start Date	✗	-	No equivalent field in AW
Priority ↓ ()	✓	Importance ↓ ()	-
End Date	✗	-	No equivalent field in AW

4.3 Other Circumstances

This section does not sync as there is no equivalent fields in AstuteWheel.

4.4 Risk Profiles



This section does not sync as there is no equivalent fields in AstuteWheel.

4.5 Investment Preference









This section does not sync as there is no equivalent fields in AstuteWheel.

5.0 Income and Expense

5.1 Income

DASH Field Name	Sync	AW Field Name	Notes
Type ↓ ()		Income	<ol style="list-style-type: none"> Gross Salary = Gross salary Bonus = Bonus & commissions Centrelink/DVA = Government support <u>Investment/Rent</u> = Does not sync (entire item) Related Trust Distributions = Other Income <u>Family Maintenance</u> = Does not sync (entire item) <u>Tax-free income</u> = Does not sync (entire item) Other = Other Income
Description*		Employer	To Sync “Gross Salary” and “Bonus”, this “Description” must match with the “Employer” Field in Employment Details.
Owner* ↓ (Contact)		Individual ↓ (Contact)	This field is required to sync to AW.
Amount* \$		Value \$	<ol style="list-style-type: none"> AW converts to annual amount. This field is required to sync to AW.
Frequency ↓ ()		-	No equivalent field in AW
Start Date		-	No equivalent field in AW
End Date		-	No equivalent field in AW
Taxable ↓ (Yes, No)		-	No equivalent field in AW

5.2 Expense

DASH Field Name	Sync	AW Field Name	Notes
Type ↓ ()		Expenses	<ol style="list-style-type: none"> 1. Lifestyle Needs = Lifestyle expenses 2. Educational Costs = Education expenses 3. Super Contributions (deductible yes) = Super contributions -> Non-concessional (Post-tax) 4. Super Contributions (deductible no) = Super contributions -> Concessional (Pre-tax) and Income Tax -> Less Deductions -> Super Contributions 5. <u>Mortgage Repayments</u> = Does not sync 6. Income Tax = Income Tax Note: AW will calculate "Income Tax" automatically if it is not entered in DASH. 7. <u>Insurance</u> = Does not sync 8. <u>Debt Repayments</u> = Does not sync 9. Other (deductible yes) = Income Tax -> Less Deductions -> Other Deductions 10. Other (deductible no) = Added to Lifestyle expenses
Description		-	No equivalent field in AW
Owner ↓ (Contact)		Next to each expense field	-
Amount \$		Value \$	AW converts to annual amount.
Frequency ↓ ()		-	No equivalent field in AW
Start Date		-	No equivalent field in AW
End Date		-	No equivalent field in AW
Deductible ↓ (Yes, No)			This field is required in some expense fields to sync to AW.

6.0 Assets and Liabilities

6.1 Assets – General
















DASH Field Name	Sync	AW Field Name	Notes
Type* ↓ ()	✓	Type ↓ ()	This field is required to sync to AW. 1. Principal Residence = Family home 2. Holiday Property = Holiday home 3. Home Contents = Contents 4. Motor Vehicles = Motor vehicle 5. Boat = Boat/Caravan 6. <u>Caravan</u> = Does not sync (type only) 7. <u>Motorbike</u> = Does not sync (type only) 8. <u>Collectibles</u> = Does not sync (type only) 9. Other = Other
Name*	✓	Description	-
Owner* ↓ (Contact)	✓	Owner ↓ (Contact)	This field is required to sync to AW.
Purchase Date	✓	Date of Purchase	-
Purchase Price \$	✓	Purchase Price \$	-
Market Value* \$	✓	Value \$	This field is required to sync to AW.
As At Date	✗	-	No equivalent field in AW
Has Liability ↓ (Yes, No)	✗	-	No equivalent field in AW

6.2 Assets – Investment

Investment Assets do not sync as there is no Astute Wheel API available.

6.3 Liabilities

DASH Field Name	Sync	AW Field Name	Notes
Liability Type* ↓ ()	✓	Type ↓ ()	This field is required to sync to AW. 1. Long term – General/Other Loan = Line of credit 2. Long term – Investment Property Mortgage = Investment loan 3. Long term – Personal Loan = Personal loan 4. Long term – Primary Residence Loan = Home mortgage 5. Long term – Margin Loan = Margin Loan 6. Current/Short term – Credit Card = Credit cards 7. Current/Short term – Outstanding Payments = Credit cards 8. <u>Current/Short term – Overdraft</u> = Doesn't sync (type only) 9. <u>The Rest</u> = Other
Name	✗	-	No equivalent field in AW
Account Number	✗	-	No equivalent field in AW
Institution	✓	Lender	-
Owner* ↓ (Contact)	✓	Borrower ↓ (Contact)	This field is required to sync to AW.
Outstanding Balance* \$	✓	Balance \$	This field is required to sync to AW.
As At Date	✗	-	No equivalent field in AW
Original Balance \$	✗	-	No equivalent field in AW
Date Commenced	✗	-	No equivalent field in AW
Original Term	✗	-	No equivalent field in AW
Term Remaining	✗	-	No equivalent field in AW
Interest Rate (p.a.) %	✓	Rate %	-
Rate Type ↓ ()	✓	Interest Type ↓ ()	1. Variable = Variable 2. <u>The Rest</u> = Does not sync

Rate Start Date		-	No equivalent field in AW
Rate End Date		-	No equivalent field in AW
Fixed Rate Term Remaining		-	No equivalent field in AW
Interest Only Term Remaining		-	No equivalent field in AW
Repayment Type ↓ ()		Repayment Type ↓ (P&I, IO)	<ol style="list-style-type: none"> 1. Interest Only = IO 2. <u>Interest Capitalised</u> = Does not sync 3. Principal And Interest – P&I 4. <u>Pre-paid interest</u> = Does not sync
Repayment Amount \$		Amount \$	<ol style="list-style-type: none"> 1. If repayment type is “P&I”, AW will sync DASH’s repayment amount. 2. If repayment type is “IO”, AW will not sync from DASH, instead AW will calculate itself based on “Interest Rate” and “Repayment Frequency”.
Repayment Amount \$		Loan repayments \$	“Repayment Amount” also sync to Expenses section under Cashflow as annual amount calculated based on the “Repayment Frequency”.
Repayment Frequency ↓ ()		Frequency ↓ ()	<p>Weekly = Weekly</p> <p>Fortnightly = Fortnightly</p> <p>Monthly = Monthly</p> <p><u>Four Weekly</u> = Yearly (Does not convert)</p> <p><u>Bi-Monthly</u> = Yealy (Does not convert)</p> <p>Quarterly = Quarterly</p> <p>Half Yearly = Half yearly</p> <p>Yearly = Yearly</p> <p><u>One-off</u> = Yearly</p>
Payment Method ↓ ()		-	No equivalent field in AW
Repayment Start Date		-	No equivalent field in AW
Repayment End Date		-	No equivalent field in AW
Guarantor Name		-	No equivalent field in AW
Guarantor Asset Type ↓()		-	No equivalent field in AW
Deductible Percentage %		-	No equivalent field in AW
Secured Asset		-	No equivalent field in AW

7.0 Super and Pension

7.1 Super

Super Assets do not sync as there is no Astute Wheel API available.

7.2 Pension

Super Assets do not sync as there is no Astute Wheel API available.

7.3 Annuity

Annuity Assets do not sync as there is no equivalent fields in AstuteWheel.

7.4 Add Super Contribution History

Note: If there are two items with the same year and the same contribution type (either Concessional or Non-Concessional) in DASH, syncing to AW will add those two together and enter as one item. But when syncing back to DASH, it will only update one item in DASH with that added amount, the other item will have its original value and it will become a duplicate. The work around is to delete the item that does not get updated. Otherwise, that amount will get added again when syncing to AW.

DASH Field Name	Sync	AW Field Name	Notes
Type ↓ ()	✓	Contribution History ↓ ()	1. All Concessional = Concessional 2. All Non-Concessional = Non-concessional
Description	✗	-	No equivalent field in AW
Owner ↓ (Contact)	✓	Owner	-
Contribution Date	✓	Year ↓ ()	AW will only sync their year.
Amount \$	✓	Contribution History \$	-

7.5 Add Super Withdrawal History

This section does not sync as there is no equivalent fields in AstuteWheel.

8.0 Insurances

8.1 Add Insurances

DASH Field Name	Sync	AW Field Name	Notes
Policy Number	✓	Policy number	-
Insurance Company	✓	Insurance company	-
Type ↓ (Whole Life, Endowment, Term)	✗	-	No equivalent field in AW
Policy Owners*	✓	Policy owner ↓ (Contact)	This field is required to sync to AW.
Life Insured* ↓ (Contact)	✓	Life insured ↓ (Contact)	This field is required to sync to AW.
Part of Super ↓ (Yes, No)	✗	-	No equivalent field in AW

8.5 Life Cover – Death (Term life)

DASH Field Name	Sync	AW Field Name	Notes
Type ↓ ()	✗	-	No equivalent field in AW
Premium \$	✓	Premium amount \$	-
Premium Frequency ↓ ()	✓	Premium frequency ↓ ()	<ol style="list-style-type: none"> 1. Weekly = Weekly 2. Fortnightly = Fortnightly 3. Monthly = Monthly 4. <u>Four Weekly</u> = Yearly (Premium x 13) 5. <u>Bi-Monthly</u> = Yealy (Premium x 6) 6. Quarterly = Quarterly 7. Half Yearly = Half yearly 8. Yearly = Yearly 9. <u>One-off</u> = Yearly
Sum Insured* \$	✓	Sum insured \$	This field is required to sync to AW.
Cover Description	✓	Benefit items	-
Commencement Date	✗	-	Due to Data Structure Difference
Renewal Date	✗	-	Due to Data Structure Difference
Premium Details ↓ ()	✓	Premium type ↓ ()	-
Loading %	✓	Policy loading %	-
Exclusions	✓	Policy exclusions	-

8.3 TPD Cover – Permanent disablement (TPD)

DASH Field Name	Sync	AW Field Name	Notes
Type ↓ ()	✓	Definition ↓ ()	1. Any Occupation = Any Occupation 2. Own Occupation = Own Occupation 3. <u>Super Linked</u> = Does not sync 4. Home Maker = Home duties 5. Independent Living = Activities of daily living 6. <u>Non-Working</u> = Does not sync
Premium \$	✓	Premium amount \$	-
Premium Frequency ↓ ()	✓	Premium frequency ↓ ()	-
Sum Insured* \$	✓	Sum insured \$	This field is required to sync to AW.
Cover Description	✓	Benefit items	-
Commencement Date	✗	-	Due to Data Structure Difference
Renewal Date	✗	-	Due to Data Structure Difference
Waiting Period	✗	-	No equivalent field in AW
Premium Details ↓ ()	✓	Premium type ↓ ()	-
Loading %	✓	Policy loading %	-
Exclusions	✓	Policy exclusions	-

8.4 Trauma Cover – Trauma (Critical Illness)

DASH Field Name	Sync	AW Field Name	Notes
Type ↓ (Basic, Comprehensive)	✗	-	No equivalent field in AW
Premium \$	✓	Premium amount \$	-
Premium Frequency ↓ ()	✓	Premium frequency ↓ ()	-
Sum Insured* \$	✓	Sum insured \$	This field is required to sync to AW.
Cover Description	✓	Benefit items	-
Commencement Date	✗	-	Due to Data Structure Difference
Renewal Date	✗	-	Due to Data Structure Difference
Premium Details ↓ ()	✓	Premium type ↓ ()	-
Loading %	✓	Policy loading %	-
Exclusions	✓	Policy exclusions	-

8.5 Business Expense – Business expense

DASH Field Name	Sync	AW Field Name	Notes
Type ↓ (Basic, Comprehensive)	✗	-	No equivalent field in AW
Premium \$	✓	Premium amount \$	-
Premium Frequency ↓ ()	✓	Premium frequency ↓ ()	-
Sum Insured* \$	✓	Sum insured \$	This field is required to sync to AW.
Sum Insured Frequency ↓ ()	✗	-	No equivalent field in AW
Cover Description	✓	Benefit items	-
Commencement Date	✗	-	Due to Data Structure Difference
Renewal Date	✗	-	Due to Data Structure Difference
Waiting Period	✓	Waiting period	-
Benefit Period	✓	Benefit period	-
Premium Details ↓ ()	✓	Premium type ↓ ()	-
Loading %	✓	Policy loading %	-
Exclusions	✓	Policy exclusions	-

9.0 Insurance Need Analysis

Insurance Need Analysis does not sync to AstuteWheel but **syncs from AstuteWheel to DASH**.

10.0 Social Security

This section does not sync as there is no equivalent field in AstuteWheel.

11.0 Estate Planning

11.1 Will Details

DASH Field Name	Sync	AW Field Name	Note
Will exists? ↓ (Yes, No)	✓	Has a will? ↓ (Yes, No)	-
Last review date	✓	Date prepared	-
Location of will	✓	Document location	-
Executor Name	✗	-	Due to Data Structure Difference
Testamentary trust exists? ↓ (Yes, No)	✗	-	No equivalent field in AW
Who has Potential Claim on Estate?	✗	-	No equivalent field in AW

11.2 Power of Attorney

DASH Field Name	Sync	AW Field Name	Notes
Type ↓ (General, Enduring, Medical, Financial , Guardianship)	✓	Appointed a Power of Attorney (Financial)? Appointed a Guardian / Power of Attorney (Medical)?	Only “Financial” and “Guardianship” type will sync to AW.
Category ↓ ()	✗	-	No equivalent field in AW
Attorney First Name	✓	Attorney(s) appointed (Name)	-
Attorney Last Name	✓	Attorney(s) appointed (Name)	-

Sync AstuteWheel to DASH

The following tables show the detailed mapping of the AstuteWheel fields that sync to DASH fields.

1.0 Summary

1.1 Goals

AW Field Name	Sync	DASH Field Name	Notes
Goal is for ↓ ()	✓	Owner ↓ ()	-
Advice Segment	✗	-	No equivalent field in DASH
Client Stated Goal	✗	-	No equivalent field in DASH
Importance	✓	Priority	-
Time Scale ↓ (Short, Medium, Long)	✓	Time Frame	Short = 0 Medium = 1 or 2 Long = 3
Agreed Goal	✓	Description	-
Start date	✗	-	Due to Data Structure Difference
End date	✗	-	Due to Data Structure Difference
Client action	✗	-	No equivalent field in DASH
Adviser action	✗	-	No equivalent field in DASH
Client Comment	✗	-	No equivalent field in DASH
Adviser Comment	✗	-	No equivalent field in DASH

2.0 Personal

2.1 General details

AW Field Name	Sync	DASH Field Name	Notes
Title ↓ ()	✓	Title ↓ ()	-
Surname*	✓	Last Name	-
First name*	✓	First Name	-
Preferred name	✓	Preferred Name	-
Gender* ↓ ()	✓	Gender ↓ ()	-
Date of birth*	✓	Date of Birth	-
Employment status* ↓ ()	✗	-	No equivalent field in DASH

Relationship status* ↓ (Single, Married, Defacto, Registered civil partnership, Divorced, Widowed)	✓	Marital Status ↓ ()	<ol style="list-style-type: none"> 1. Single = Single 2. Married = Married 3. Defacto = De Facto 4. Registered civil partnership = Engaged 5. Divorced = Divorced 6. Widowed = Widowed
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2.2 Health & Lifestyle

AW Field Name	Sync	DASH Field Name	Notes
Health status ↓ (Excellent, Good, Average, Poor)	✓	Health State ↓ ()	<ol style="list-style-type: none"> 1. Excellent = Excellent 2. Good = Good 3. Average = Good 4. Poor = Poor
Smoker ↓ (Non-smoker, Smoker, Ceased within 12 mths)	✓	Smoker ↓ (Yes or No)	<ol style="list-style-type: none"> 1. Non-smoker = No 2. Smoker = Yes 3. Ceased within 12 mths = No
Private health insurance ↓ ()	✓	Private Health Cover ↓ ()	-



2.3 Contact details

AW Field Name	Sync	DASH Field Name	Notes
Home phone	✓	Phone (home)	-
Mobile*	✓	Phone (mobile)	-
Work phone	✓	Phone (work)	<u>Country code</u> will not sync to DASH as there is no field in AW.
Email address*	✓	Email (home)	-
Residential address	✓	Address (home) Note:	<u>Country</u> will not sync to DASH as there is no field in AW.
Postal address	✓	Address (postal)	-

3.0 Family & Entities







3.1 Children

AW Field Name	Sync	DASH Field Name	Notes
Name	✓	Name	-
Date of birth*	✓	Date of Birth	-
Gender*	✗	-	No equivalent field in DASH

Year at School*		-	No equivalent field in DASH
Living at home ↓ ()		Financial Dependant ↓ ()	-

4.0 Assets & Liabilities


4.1 Lifestyle Assets

AW Field Name	Sync	DASH Field Name	Notes
Type* ↓ ()		Type ↓ ()	<ol style="list-style-type: none"> 1. Family home = Principal Residence 2. Contents = Home Contents 3. Motor vehicle = Motor Vehicles 4. Boat/Caravan = Boat 5. Holiday home = Holiday Property 6. Other = Other
Description		Name	-
Owner* ↓ (Contact)		Owner ↓ (Contact)	-
Value* \$		Market Value \$	-
Date of Purchase		Purchase Date	-
Purchase Price \$		Purchase Price \$	-

4.2 Investment Assets

Investment Assets do not sync as there is no Astute Wheel API available.

4.3 Liabilities

AW Field Name	Sync	DASH Field Name	Notes
Type* ↓ ()		Liability Type ↓ ()	<ol style="list-style-type: none"> 1. Home Mortgage = Long term – Primary Residence Loan 2. Investment loan = Long term – Investment Property Mortgage 3. Personal loan = Long Term – Personal Loan 4. Credit cards = Current/ Short term – Credit Card 5. <u>Lease</u> = Does not sync (Type only) 6. Line of credit = Long term – General/ Other Loan 7. Margin loan = Long term – Margin Loan

			8. Other = Current/ Short term – General/ Other Loan
Lender	✓	Institution	-
Borrower* ↓ (Contact)	✓	Owner ↓ (Contact)	-
Balance* \$	✓	Outstanding Balance \$	-
Loan Limit \$	✗	-	No equivalent field in DASH
Interest Rate %	✓	Interest Rate (p.a.) %	-
Interest Type ↓ (Variable, Fixed 1 to 10 Year)	✓	Rate Type ↓ (Fixed, Variable, Split, Not Specified)	1. Variable = Variable 2. Fixed 1 to 10 Year = Fixed
Repayments Frequency ↓ ()	✓	Repayment Frequency ↓ ()	1. Weekly = Weekly 2. Fortnightly = Fortnightly 3. Monthly = Monthly 4. Quarterly = Quarterly 5. Half yearly = Half Yearly 6. Yearly = Yearly
Repayments Type ↓ (P&I, IO)	✓	Repayment Type ↓ ()	1. P&I = Principal And Interest 2. IO = Interest Only
Repayments Amount \$	✓	Repayment Amount \$	Calculated by using “Interest Rate” and “Repayment Frequency”.
Linked Assets ↓ (Assets)	✓	Secured Asset	-

5.0 Super

5.1 Superannuation Accounts

Super Assets do not sync as there is no Astute Wheel API available.

5.2 Contribution History










Note: When syncing to DASH, DASH will create both concessional and non-concessional record for the item entered in AW.

AW Field Name	Sync	DASH Field Name	Notes
Type ↓ ()	✓	Type ↓ ()	1. Concessional = Concessional Personal Deductible 2. Non-concessional = Non-Concessional Personal
Year	✓	Contribution Date	The Default Date is 1 st of July (Year in AW) will sync to DASH.

6.0 Cashflow








6.1 Employment

Important Note: Due to data structure differences, Cashflow and Estimated Cashflow sections does not sync to DASH. However, Employment Type, Occupation, Employer, Weekly working hours fields in Cashflow sync back to DASH.

AW Field Name	Sync	DASH Field Name	Notes
Individual*		Owner	-
Employment type* ↓ ()		Employment Status ↓ ()	1. Full-time = Full Time 2. Part-time = Part Time 3. Casual = Casual 4. Contractor = Contract 5. Self-Employed = Self Employed
Occupation*		Occupation	-
Employer		Employer	-
Weekly working hours		Hours Worked Per Week	-
Gross salary* \$		-	Due to Data Structure Difference
Bonus & commissions		-	Due to Data Structure Difference
Package items		-	No equivalent field in DASH
SG contributions*		-	No equivalent field in DASH

7.0 Insurance

7.1 Policy Information

AW Field Name	Sync	DASH Field Name	Notes
Policy Number		Policy Number	-
Linked policy		-	No equivalent field in DASH
Insurance company*		Insurance Company	-
		Type ↓ ()	“Term” by default when sync to DASH
Description		-	No equivalent field in DASH
Commencement date		Commencement Date	-
Renewal date		Renewal Date	“Renewal date” does not have year in AW so it will sync the same year as the “Commencement date”.

Life insured*↓ (Contact)	✓	Life Insured ↓ (Contact)	-
Policy owner*↓ (Contact)	✓	Policy Owners	-
Annual premium	✗	-	No equivalent field in DASH
Annual commission	✗	-	No equivalent field in DASH
Comments	✗	-	No equivalent field in DASH

7.2 Cover benefits

AW Field Name	Sync	CRM Field Name	Notes
Cover type*↓ ()	✓	Cover Category ↓ ()	<ol style="list-style-type: none"> 1. Death (Term life) = Life Cover (Term Type) 2. Permanent disablement (TPD) = TPD Cover (Own Occupation Type) 3. Income protection (IP) = Income Protection (Without Type) 4. Trauma = Trauma Cover (Without Type) 5. Child Trauma = Trauma Cover (Without Type) 6. Business expense = Business Expense (Without Type)
Sum insured* \$	✓	Sum Insured \$	-
	✓	Sum Insured Frequency	Monthly by default when syncing to DASH
Definition (Only in Income Protection Cover) ↓ ()	✓	Cover Definition ↓ (Agreed, Indemnity, Super Linked)	<ol style="list-style-type: none"> 1. Endorsed agreed = Agreed 2. Agreed = Agreed 3. Indemnity = Indemnity
Benefit items	✓	Cover Description	Separated by colon (;) in DASH
Policy loading %	✓	Loading %	-
Policy exclusions	✓	Exclusions	Separated by colon (;) in DASH
Premium amount \$	✓	Premium \$	-
Policy fee \$	✗	-	No equivalent field in DASH
Stamp duty \$	✗	-	No equivalent field in DASH
Premium frequency* ↓ ()	✓	Premium Frequency ↓ ()	<ol style="list-style-type: none"> 1. Weekly = Weekly 2. Fortnightly = Fortnightly 3. Monthly = Monthly 4. Quarterly = Quarterly 5. Half yearly = Half Yearly

			6. Yearly = Yearly
Premium type ↓ ()	✓	Premium Details ↓ ()	-
Commission %	✗	-	No equivalent field in DASH

8.0 Estate

8.1 Will

AW Field Name	Sync	DASH Field Name	Notes
Has a will? ↓ (Yes, No)	✓	Will exists? ↓ (Yes or No)	-
Date prepared	✓	Last review date	-
Will Location	✓	Location of will	-
	✗	Testamentary trust exists?	“No” by default in DASH
Year last reviewed?	✗	-	No equivalent field in DASH
Have you married, divorced or had children since being reviewed?	✗	-	No equivalent field in DASH
Guardians nominated for minor children?	✗	-	No equivalent field in DASH
Executor(s)	✗	-	No equivalent field in DASH

8.2 Attorneys

AW Field Name	Sync	DASH Field Name	Notes
Appointed a Power of Attorney (Financial)?	✓	Power Of Attorney – Type (Financial)	-
Enduring attorney?	✗	-	No equivalent field in DASH
Attorney(s) appointed	✓	Power Of Attorney - First Name and Last Name	-
Appointed a Guardian/Power of Attorney (Medical)?	✓	Power Of Attorney – Type (Guardianship)	-
Attorney(s) appointed	✓	Power Of Attorney - First Name and Last Name	-

9.0 Insurance Need Analysis

Insurance Need Analysis is from the “**Meeting Dashboard**” of AstuteWheel, and it can be imported to DASH from “**Import Scenarios**” dashboard in AW Connector.

9.1 Life and TPD


AW Field Name	Sync	DASH Field Name	Notes
Calculated sum insured \$	✓	Sum Insured \$	-
Premium Type ↓ (Stepped, Level, Hybrid (Combination))	✓	Premium Structure ↓ (Stepped, Level, Hybrid)	Stepped = Stepped Level = Level <u>Hybrid (Combination)</u> = Stepped
-	✗	Premium Waiver ↓ (Yes, No)	Does not sync
Policy Ownership ↓ ()	✓	Ownership ↓ (Individual, Super, SMSF)	Self (Personally) = Individual Cross (Other individual) = Individual Joint (Self & other individual) = Individual Superannuation (Insurance only) = SMSF Superannuation (Public/Retail fund) = SMSF Superannuation (SMSF) = Super Split (Self & super fund) = SMSF Trust or company = Individual
-	✗	Rollover ↓ (Yes, No)	No equivalent field in AW
Calculated sum insured \$	✓	TPD Ext Sum Insured \$	-
Premium Type ↓ (Stepped, Level, Hybrid (Combination))	✓	TPD Ext Premium Structure ↓ (Stepped, Level, Hybrid)	Stepped = Stepped Level = Level <u>Hybrid (Combination)</u> = Stepped
-	✗	TPD Ext Premium Waiver ↓ (Yes, No)	No equivalent field in AW
Policy Definition ↓ ()	✓	TPD Ext Occupation Type	Own Occupation = O Any occupation = A Home duties = A Activities of daily living = D
Policy Ownership ↓ ()	✓	TPD Ext Owner ↓ (Individual, Super, SMSF)	Self (Personally) = Individual Cross (Other individual) = Individual Joint (Self & other individual) = Individual Superannuation (Insurance only) = SMSF Superannuation (Public/Retail fund) = SMSF Superannuation (SMSF) = Super Split (Self & super fund) = SMSF Trust or company = Individual
-	✗	TPD Ext Rollover ↓ (Yes, No)	No equivalent field in AW

9.2 Trauma

AW Field Name	Sync	DASH Field Name	Notes
Calculated sum insured \$	✓	Sum Insured \$	-
Premium Type ↓ (Stepped, Level, Hybrid (Combination))	✓	Premium Structure ↓ (Stepped, Level, Hybrid)	Stepped = Stepped Level = Level <u>Hybrid (Combination)</u> = Stepped
-	✗	Premium Waiver ↓ (Yes, No)	No equivalent field in AW
-	✗	Reinstatement Option ↓ (Yes, No)	No equivalent field in AW
-	✗	Baby Care ↓ (Yes, No)	No equivalent field in AW
Cover Level ↓ (Standard (Basic), Premier (Comprehensive))	✓	Cover Level	Standard (Basic) = B Premier (Comprehensive) = C

9.3 Income Protection (IP)

AW Field Name	Sync	DASH Field Name	Notes
Insured Amount \$	✓	Monthly Benefit \$	-
Premium Type ↓ (Stepped, Level, Hybrid (Combination))	✓	Premium Structure ↓ (Stepped, Level, Hybrid)	Stepped = Stepped Level = Level Hybrid (Combination) = Stepped
-	✗	Ownership ↓ (Individual, Super, SMSF)	No equivalent field in AW
-	✗	Rollover ↓ (Yes, No)	No equivalent field in AW
-	✗	Agreed Value Option	No equivalent field in AW
-	✗	Increasing Claim Benefit Option	No equivalent field in AW
Benefit period ↓ ()	✓	Benefit Period	2 years = 2 5 years = 5 <u>10 years</u> = 2 To age 65 = 65 To age 70 = 70 <u>Other</u> = Didn't sync
Waiting Period ↓ ()	✓	Waiting Period	2 weeks = 14 (Converted to days) 1 month = 30 (Converted to days) 2 months = 60 (Converted to days)

			<p>3 months = 90 (Converted to days)</p> <p>6 months = 180 (Converted to days)</p> <p>1 year = 365 (Converted to days)</p> <p>2 years = 730 (Converted to days)</p> <p><u>Other</u> = Didn't sync</p>
Cover Level ↓ (Standard (Basic), Premier (Comprehensive))		Cover Level	<p><u>Standard (Basic)</u> = C</p> <p>Premier (Comprehensive) = C</p>