

# DASH

USER GUIDE

Xplan

**CONNECTOR – PART 2**  
**(Data Mapping)**

# Contents

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# Introduction

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

**Important Note:** This data mapping is based on our standard Xplan application, and some fields may not sync if you use a customized Xplan application like Compass.

## Document Guide


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

↓ - This arrow key represents dropdown option.

Underline - Fields that don't sync to Xplan.

 - Sync

 - Doesn't sync













 - Sync with limitations

## Sync DASH to Xplan

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

### 1.0 General Information

DASH Field Name	Sync	Xplan Field Name	Notes
Title ↓ ()		Title ↓ ()	<u>Professor</u> doesn't sync to Xplan.
First Name*		First name	-
Middle Name		-	No Xplan API available
Last Name*		Surname	-
Preferred Name		Preferred name	-
About		-	No equivalent field in Xplan
Owner ↓ (Contact)		Client	-
Category ↓		-	No equivalent field in Xplan
Referrer		-	No equivalent field in Xplan
Email (home)		Email address (home)	-
Email (work)		Email address (work)	-
Date of Birth		Date of birth	-

Gender ↓ ()	✓	Gender ↓ ()	“Unspecified” will not sync to Xplan.
Phone (mobile)	✓	Mobile	<u>Country code</u> will not sync to Xplan.
Phone (home)	✓	Home phone	<u>Country code</u> will not sync to Xplan.
Phone (work)	✓	Work phone	<u>Country code</u> will not sync to Xplan.
Address (home)	✓	Residential address	-
Address (postal)	✓	Postal Address	-
Address (work)	✓	Work Address	-
Address (others)	✓	Other Address	-

## 2.0 Personal Details

### 2.1 Personal Details

DASH Field Name	Sync	Xplan Field Name	Notes
Date of Death (if Deceased)	✗	-	No equivalent field in Xplan
Marital Status ↓ (Married, Divorced, Widowed, Single, De Facto, Engaged, Separated, <u>Unknown</u> )	✓	Relationship status ↓ ()	<ol style="list-style-type: none"> <li>1. Married = Married</li> <li>2. Divorced = Divorced</li> <li>3. Widowed = Widowed</li> <li>4. Single = Single</li> <li>5. De Facto = De Facto</li> <li>6. Engaged = De Facto</li> <li>7. Separated = Separated</li> <li>8. <u>Unknown</u> = Doesn't Sync (Will be blank)</li> </ol>
Health State ↓ ()	✗	-	No Xplan API available
Private Health Cover ↓ ()	✗	-	No equivalent field in Xplan
Smoker ↓ (Yes, No)	✓	Smoker ↓ ()	“Yes” by Default if not entered.
Australian Tax Resident ↓ ()	✓	Tax Resident Status ↓ (Resident or Non Resident)	<ol style="list-style-type: none"> <li>1. Yes = Resident</li> <li>2. No = Non Resident</li> </ol>
Retirement Date	✗	-	No equivalent field in Xplan

### 2.2 Employment Details

This section does not sync as there is no Xplan API available.

### 2.3 Employment Leave Details

This section does not sync as there are no equivalent fields in Xplan.

## 2.4 Identity Checks

This section does not sync as there is no Xplan API available.

## 3.0 Dependants

DASH Field Name	Sync	Xplan Field Name	Notes
Name	✓	Name	Sync as First Name and Surname
Date of Birth	✓	Date of birth	-
Relationship	✗	-	No Xplan API available
Financial Dependand ↓ ()	✓	Financial Dependand ↓ ()	-
Dependant till Age	✓	Dependant Until Age	-
Responsible of* ↓ (Contact)	✓	Related to ↓ (Contact)	This field is <b>required</b> to sync to Xplan.

## 4.0 Advice Details

### 4.1 Reasons for Seeking Advice

This section does not sync as there are no equivalent fields in Xplan.

### 4.2 Goals

DASH Field Name	Sync	Xplan Field Name	Notes
Type ↓ ()	✗	-	No Xplan API available
Description	✓	Description	-
Status ↓ ()	✓	Status	<u>Amended</u> goals will not sync to Xplan.
Timeframe	✓	Time Scale (Years)	Xplan will take timeframe as years.
Amount \$	✗	-	No Xplan API available
Owner ↓ (Contact)	✓	Related to ↓ (Contact)	If the contact has a partner, the goals will sync as "Client and Partner".
Start Date	✓	Capture Date	-
Priority ↓ ()	✗	-	No Xplan API available
End Date	✗	-	No equivalent field in Xplan

### 4.3 Other Circumstances

This section does not sync as there is no Xplan API available.

### 4.4 Risk Profiles

This section does not sync as there is no Xplan API available.

## 4.5 Investment Preference

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

## 5.0 Income and Expense

### 5.1 Income

DASH Field Name	Sync	Xplan Field Name	Notes
Type ↓ ()	✓	Sub-Type ↓ ()	<ol style="list-style-type: none"> <li>1. Gross Salary = Original Wages</li> <li>2. Bonus = Bonuses</li> <li>3. Centrelink/DVA = Other Income</li> <li>4. Investment/Rent = Investment: Interest</li> <li>5. Related Trust Distributions = Other Income</li> <li>6. Family Maintenance = Lifestyle Income</li> <li>7. Tax-free income = Other Income</li> <li>8. Super Income Stream = Other Income</li> <li>9. Non-super Income Stream = Other Income</li> <li>10. Other = Other Income</li> </ol>
Description	✓	Description	-
Owner ↓ (Contact)	✓	Owner ↓ (Contact)	-
Amount \$	✓	Amount \$	-
Frequency ↓ ()	✓	Frequency ↓ ()	<ol style="list-style-type: none"> <li>1. One-off = Single</li> <li>2. <u>Daily</u> = Doesn't Sync (the whole item)</li> <li>3. Weekly = Weekly</li> <li>4. Fortnightly = Fortnightly</li> <li>5. Monthly = Monthly</li> <li>6. Quarterly = Quarterly</li> <li>7. Half-Yearly = Half-yearly</li> <li>8. Annually = Yearly</li> </ol>
Start Date	✓	Start Date	-
End Date	✓	End Date	-
Taxable ↓ (Yes, No)	✗	-	No equivalent field in Xplan

## 5.2 Expense

DASH Field Name	Sync	Xplan Field Name	Notes
Type ↓ ()	✓	Sub-Type ↓ ()	<ol style="list-style-type: none"> <li>1. Lifestyle Needs = Housing / Other Savings</li> <li>2. Education Costs = Other Expenditure / Other Expenditure</li> <li>3. Super Contributions = Contributions / Post Tax Contributions</li> <li>4. Mortgage Repayments = Debt-Long Term / Mortgage Payments</li> <li>5. Income Tax = Taxes / Income Tax</li> <li>6. Insurance = Insurance / Life</li> <li>7. Debt Repayments = Debt-Short Term / Credit Cards</li> <li>8. Other = Other Expenditure / Other Expenditure</li> </ol>
Description	✓	Description	-
Owner ↓ (Contact)	✓	Owner ↓ (Contact)	-
Amount \$	✓	Amount \$	-
Frequency ↓ ()	✓	Frequency ↓ ()	<ol style="list-style-type: none"> <li>1. One-off = Single</li> <li>2. <u>Daily</u> = Doesn't Sync (the whole item)</li> <li>3. Weekly = Weekly</li> <li>4. Fortnightly = Fortnightly</li> <li>5. Monthly = Monthly</li> <li>6. Quartey = Quarterly</li> <li>7. Half-Yearly = Half-yearly</li> <li>8. Annually = Yearly</li> </ol>
Start Date	✓	Start Date	-
End Date	✓	End Date	-
Deductible ↓ (Yes, No)	✗	-	No equivalent field in Xplan

## 6.0 Assets and Liabilities

### 6.1 Assets – General

DASH Field Name	Sync	Xplan Field Name	Notes
Type ↓ ()	✓	Type ↓ () / Asset Type ↓ ()	<ol style="list-style-type: none"> <li>1. Principal Residence = Real Estate / Primary Residence</li> <li>2. Holiday Property = Life Style / Other Life Style</li> <li>3. Home Contents = Life Style / Household Contents</li> <li>4. Motor Vehicles = Life Style / Motor Vehicle</li> <li>5. Boat = Life Style / Other Life Style</li> <li>6. Caravan = Life Style / Other Life Style</li> <li>7. Motorbike = Life Style / Other Life Style</li> <li>8. Collectibles = Life Style / Antiques</li> <li>9. Other = Life Style / Other Life Style</li> </ol>
Name	✓	Description	-
Owner ↓ (Contact)	✓	Owner Type ↓ (Contact)	-
Purchase Date	✓	Acquisition Date	-
Purchase Price \$	✓	initial Value \$	-
Market Value \$	✓	Current Value \$	-
As At Date	✗	-	No equivalent field in Xplan
Has Liability ↓ (Yes, No)	✗	-	No equivalent field in Xplan



## 6.2 Assets – Investment

### Platform

DASH Field Name	Sync	Xplan Field Name	Notes
Name	✓	Description	Sync to <b>Investments</b> -> <b>Platforms</b>
Account Number	✓	Policy Number	-
Market Value \$	✓	Current Value \$	-
Open Date	✗	-	No equivalent field in Xplan
Regular Investment (p.a.) \$	✗	-	No Xplan API available
Owners	✓	Owners	Owner Percentage also syncs and updates
Model Portfolio	✗	-	No equivalent field in Xplan

### Annuity

DASH Field Name	Sync	Xplan Field Name	Notes
Name	✓	Description	Sync to <b>Retirement</b> -> <b>Annuity</b>
Account Number	✓	Policy Number	-
Annuity Type	✗	-	No equivalent field in Xplan
Market Value (\$)	✓	Current Value	-
Income / Interest %	✗	-	No equivalent field in Xplan
Purchase Price \$	✓	Initial Value	Under <b>Values</b> Tab in Xplan
Purchase Date	✓	Acquisition Date	Under <b>Values</b> Tab in Xplan
Payment Amount \$	✗	-	No equivalent field in Xplan
Frequency	✗	-	No equivalent field in Xplan
Term	✗	-	No equivalent field in Xplan
Maturity Date	✗	-	No equivalent field in Xplan
Guarantee Period	✗	-	No equivalent field in Xplan
CPI Percentage %	✗	-	No equivalent field in Xplan
Tax Free Percentage %	✗	-	No equivalent field in Xplan
RCV Percentage %	✗	-	No equivalent field in Xplan
Tax Deductible Percentage %	✗	-	No equivalent field in Xplan
Tax Deductible Amount \$	✗	-	No equivalent field in Xplan
Centrelink Deductible Amount	✗	-	No equivalent field in Xplan
Owners	✓	Owners	Owner Percentage also syncs and updates

## Shares

DASH Field Name	Sync	Xplan Field Name	Notes
Name	✓	Description	Sync to <b>Investments</b> -> <b>Stocks</b>
Code	✗	-	No equivalent field in Xplan
HIN/SRN	✓	Policy Number	-
Unit Price \$	✗	-	No equivalent field in Xplan
No. of Shares	✗	-	No equivalent field in Xplan
Market Value \$	✓	Current Value \$	-
Income / Interest %	✗	-	No equivalent field in Xplan
Purchase Price \$	✓	Initial Value \$	Under <b>Values</b> Tab in Xplan
Purchase Date	✓	Acquisition Date	Under <b>Values</b> Tab in Xplan
Management Cost %	✗	-	No equivalent field in Xplan
Regular Investment (p.a.) \$	✗	-	No Xplan API available
Owners	✓	Owners	Owner Percentage also syncs and updates

## Bond

DASH Field Name	Sync	Xplan Field Name	Notes
Name	✓	Description	Sync to <b>Investments</b> -> <b>Bonds</b>
Code	✗	-	No equivalent field in Xplan
Account Number	✓	Policy Number	-
Unit Price \$	✗	-	No equivalent field in Xplan
Unit	✗	-	No equivalent field in Xplan
Market Value \$	✓	Current Value \$	-
Income / Interest %	✗	-	No equivalent field in Xplan
Purchase Price \$	✓	Initial Value \$	Under <b>Values</b> Tab in Xplan
Purchase Date	✓	Acquisition Date	Under <b>Values</b> Tab in Xplan
Management Cost %	✗	-	No equivalent field in Xplan
Regular Investment (p.a.) \$	✗	-	No Xplan API available
Owners	✓	Owners	Owner Percentage also syncs and updates

## Managed Fund

DASH Field Name	Sync	Xplan Field Name	Notes
Name	✓	Description	Sync to <b>Investments</b> -> <b>Unit Trusts</b>
Code	✗	-	No equivalent field in Xplan
Account Number	✓	Policy Number	-
Unit Price \$	✗	-	No equivalent field in Xplan
Units	✗	-	No equivalent field in Xplan
Market Value \$	✓	Current Value	-
Income / Interest %	✗	-	No equivalent field in Xplan
Purchase Price \$	✓	Initial Value	Under <b>Values</b> Tab in Xplan
Purchase Date	✓	Acquisition Date	Under <b>Values</b> Tab in Xplan
Management Cost %	✗	-	No equivalent field in Xplan
Buy Spread %	✗	-	No equivalent field in Xplan
Sell Spread %	✗	-	No equivalent field in Xplan
Regular Investment (p.a.) \$	✗	-	No Xplan API available
Owners	✓	Owners	Owner Percentage also syncs and updates

## Cash

DASH Field Name	Sync	Xplan Field Name	Notes
Name	✓	Description	Sync to <b>Liquid Assets</b> -> <b>Cash on Hand</b>
BSB	✗	-	No equivalent field in Xplan
Account Number	✓	Policy Number	-
Market Value \$	✓	Current Value \$	-
Income / Interest %	✗	-	No equivalent field in Xplan
Regular Investment (p.a.) \$	✗	-	No equivalent field in Xplan
Management Cost %	✗	-	No equivalent field in Xplan
Owners	✓	Owners	Owner Percentage also syncs and updates

## Term Deposit

DASH Field Name	Sync	Xplan Field Name	Notes
Name	✓	Description	Sync to <b>Investments</b> -> <b>Term Deposit</b>
Account Number	✗	-	No Xplan API available
Market Value \$	✓	Current Value \$	-

Income / Interest %	✗	-	No equivalent field in Xplan
Term (in months)	✗	-	No equivalent field in Xplan
Maturity Date	✗	-	No equivalent field in Xplan
Regular Investment (p.a.) \$	✗	-	No Xplan API available
Owners	✓	Owners	Owner Percentage also syncs and updates





## Property

DASH Field Name	Sync	Xplan Field Name	Notes
Name	✓	Description	Sync to <b>Real Estate</b> -> <b>Investment Property</b>
Address	✗	-	No equivalent field in Xplan
Market Value \$	✓	Current Value \$	-
Income / Interest %	✗	-	No equivalent field in Xplan
Purchase Price	✓	Initial Value \$	Under <b>Values</b> Tab in Xplan
Purchase Date	✓	Acquisition Date	Under <b>Values</b> Tab in Xplan
Other Cost Base Amount \$	✗	-	No equivalent field in Xplan
Owners	✓	Owners	Owner Percentage also syncs and updates

## Other

DASH Field Name	Sync	Xplan Field Name	Notes
Name	✓	Description	Sync to <b>Investments</b> -> <b>Other Investments</b>
Account Number	✓	Policy Number	-
Market Value \$	✓	Current Value \$	-
Unit	✗	-	No equivalent field in Xplan
Unit Price	✗	-	No equivalent field in Xplan
Income / Interest %	✗	-	No equivalent field in Xplan
Purchase Price \$	✓	Initial Value	Under <b>Values</b> Tab in Xplan
Purchase Date	✓	Acquisition Date	Under <b>Values</b> Tab in Xplan
Maturity Date	✗	-	No equivalent field in Xplan
Management Cost %	✗	-	No equivalent field in Xplan
Regular Investment (p.a.) \$	✗	-	No Xplan API available
Owners	✓	Owners	Owner Percentage also syncs and updates

### 6.3 Liabilities

DASH Field Name	Sync	Xplan Field Name	Notes
Liability Type* ↓ ()		Type ↓ () and Sub-Type ↓ ()	<ol style="list-style-type: none"> <li>1. Contingent – Joint and Several = Contingent / Joint and Several</li> <li>2. Contingent – Limited = Contingent / Limited</li> <li>3. Long term – Car Loan = Long Term / Car Loan</li> <li>4. Long term – Educational Loan = Long Term / Personal Loan</li> <li>5. Long term – General/Other Loan = Long Term / Other Loans</li> <li>6. Long term – Investment Property Mortgage = Long Term / Investment Property Mortgage</li> <li>7. Long term – Personal Loan = Long Term / Personal Loans</li> <li>8. Long term – Primary Residence Loan = Long Term – Primary Residence Mortgage</li> <li>9. <u>Long term – Buy to Let Mortgage</u> = Doesn't Sync (the whole item)</li> <li>10. Long term – Margin Loan = Long term / Margin Loan</li> <li>11. Current/Short term – Credit Card = Current / Credit Card Balances</li> <li>12. Current/Short term – Outstanding Payments = Current / Outstanding Payment</li> <li>13. Current/Short term – Overdraft = Current / Overdraft</li> <li>14. Current/Short term – General/Other Loan = Current / Other Loans</li> </ol>
Name		Package/ Product Name	-
Account Number		Policy Number	-
Institution		-	No Xplan API available

Owner ↓ (Contact)	✓	Owner ↓ (Contact)	-
Outstanding Balance \$	✓	Outstanding Balance \$	-
As At Date	✓	Valuation Date	-
Original Balance \$	✗	-	No Xplan API available
Date Commenced	✗	-	No Xplan API available
Original Term	✗	-	No Xplan API available
Term Remaining	✗	-	No Xplan API available
Interest Rate (p.a.) %	✓	Interest Rate p.a %	-
Rate Type ↓ ()	✓	Interest Rate Type ↓ (Fixed, Variable)	1. Fixed = Fixed 2. Variable = Variable 3. <u>The Rest</u> = Does not sync
Rate Start Date	✓	Repayment -> Start Date	-
Rate End Date	✓	Repayment -> End Date	-
Fixed Rate Term Remaining	✗	-	No Xplan API available
Interest Only Term Remaining	✗	-	No Xplan API available
Repayment Type ↓ ()	✗	-	No Xplan API available
Repayment Amount \$	✓	Repayment Amount \$	-
Repayment Frequency ↓ ()	✓	Repayment Frequency ↓ ()	1. Weekly = Weekly 2. Fortnightly = Fortnightly 3. Monthly = Monthly 4. <u>Four Weekly</u> = Yearly (Doesn't convert) 5. <u>Bi-Monthly</u> = Yearly (Doesn't convert) 6. Quarterly = Quarterly 7. Half Yearly = Half-yearly 8. Yearly = Yearly 9. One-off = Single
Payment Method ↓ ()	✗	-	No Xplan API available
Repayment Start Date	✗	-	No Xplan API available
Repayment End Date	✗	-	No Xplan API available
Guarantor Name	✗	-	No Xplan API available
Guarantor Asset Type ↓()	✗	-	No Xplan API available
Deductible Percentage %	✗	-	No Xplan API available
Secured Asset	✗	-	No Xplan API available

## 7.0 Super and Pension

### 7.1 Super

#### Platform

Sync to Financial Information -> **Superannuation Details** -> **Existing Fund**

DASH Field Name	Sync	Xplan Field Name	Notes
Name	✓	Super Plan	-
Account Number	✓	Reference Number	-
Market Value \$	✗		No equivalent field in Xplan
Type ↓()	✓	Type ↓()	-
Taxed Element \$	✓	Taxable – Taxed Element \$	Under <b>Balances</b> Tab in Xplan
Untaxed Element \$	✗		No Xplan API available
Tax Free Element \$	✓	Tax Free \$	Under <b>Balances</b> Tab in Xplan
Preserved Amount \$	✗		No Xplan API available
Restricted Non Preserved \$	✗		No Xplan API available
Unrestricted Non Preserved \$	✗		No Xplan API available
Eligible Service Date	✓	Eligible Service Date	-
Open Date	✗		No equivalent field in Xplan
Insurance Policy	✗		No equivalent field in Xplan
Regular Investment (p.a.)	✗		No equivalent field in Xplan
<b>Owner</b>	✗		No equivalent field in Xplan
<b>Beneficiaries</b>	✗		No Xplan API available
<b>Asset Class</b>	✗		No Xplan API available

#### Other

Sync to Financial Information -> **Assets & Liabilities** -> **Assets**

DASH Field Name	Sync	Xplan Field Name	Notes
Name	✓	Description	Sync to Investments -> Other Investments
Account Number	✓	Policy Number	-
Market Value \$	✓	Current Value \$	-
Type ↓()	✗	-	No Xplan API available
Unit	✗	-	No equivalent field in Xplan
Unit Price	✗	-	No equivalent field in Xplan

Income / Interest %	✗	-	No equivalent field in Xplan
Purchase Price \$	✓	Initial Value \$	Under <b>Values</b> Tab in Xplan
Purchase Date	✓	Acquisition Date	Under <b>Values</b> Tab in Xplan
Maturity Date	✗	-	No equivalent field in Xplan
Management Cost %	✗	-	No equivalent field in Xplan
Regular Investment (p.a.)	✗	-	No equivalent field in Xplan
Insurance Policy	✗	-	No equivalent field in Xplan
<b>Owner</b>	✓	Owners	Owner Percentage also syncs and updates
<b>Beneficiaries</b>	✗		No Xplan API available
<b>Asset Class</b>	✗		No Xplan API available

## 7.2 Pension

### Platform

Sync to Financial Information -> **Superannuation Details** -> **Retirement Income**

DASH Field Name	Sync	Xplan Field Name	Notes
Name	✓	Description	-
Account Number	✓	Reference Number	-
Market Value \$	✗	-	No Xplan API available
Purchase Price \$	✗	-	No Xplan API available
Purchase Date	✗	-	No Xplan API available
Amount \$	✓	Pension Balance \$	Under Values tab in Xplan
Taxed Element \$	✗	-	No Xplan API available
Tax Free Element \$	✗	-	No Xplan API available
Pension Type ↓()	✓	Type ↓()	<p><b><u>Dash Type -&gt; Xplan Type</u></b></p> <ol style="list-style-type: none"> <li>1. Account based -&gt; Account Based Pension</li> <li>2. Account based TTR -&gt; Account Based Pension TTR</li> <li>3. Allocated -&gt; Allocated Pension</li> <li>4. Term allocated -&gt; Term Allocated Pension</li> <li>5. Life time -&gt; Lifetime Pension</li> </ol>



			6. Life Expectancy -> Life Expectancy Pension 7. Fixed term -> Fixed Term Pension 8. Other -> Account Based Pension
Payment Type ↓()	✓	Payment Type ↓()	Under <b>Payments</b> Tab in Xplan Will sync as Minimum only to Xplan
Payment Amount \$	✓	Payment \$	Under <b>Payments</b> Tab in Xplan
Frequency ↓()	✓	Frequency ↓()	Under <b>Payments</b> Tab in Xplan Will sync as Monthly only to Xplan
Term	✗	-	No Xplan API available
Maturity Type	✗	-	No Xplan API available
Open Date	✗	-	No Xplan API available
Reversionary	✗	-	No Xplan API available
Tax Free Percentage %	✓	Tax Deductible Percentage	Under <b>Payments</b> Tab in Xplan
Tax Deductible Amount \$	✗	-	No Xplan API available
Centrelink Deductible Amount	✓	Centrelink Deductible Amount	Under <b>Payments</b> Tab in Xplan
Guarantee Period	✗	-	No Xplan API available
Regular Investment (p.a.) \$	✗	-	No Xplan API available
<b>Owner</b>	✗	-	No Xplan API available
<b>Beneficiaries</b>	✗	-	No Xplan API available
<b>Asset Class</b>	✗	-	No Xplan API available

## Annuity

Sync to Financial Information -> **Superannuation Details** -> **Retirement Income**


DASH Field Name	Sync	Xplan Field Name	Notes
Name	✓	Description	-
Account Number	✓	Reference Number	-
Annuity Type ↓()	✓	Type ↓()	Only sync to Account Based Pension type in Xplan.
Amount \$	✓	Pension Balance \$	Under Values tab in Xplan
Market Value \$	✗	-	No Xplan API available
Income / Interest %	✗	-	No Xplan API available
Purchase Price \$	✗	-	No Xplan API available

Purchase Date	✗	-	No Xplan API available
Payment Amount	✓	Payment	Under <b>Payments</b> Tab in Xplan
Frequency	✓	Frequency	Under <b>Payments</b> Tab in Xplan
Term	✓	Term at Purchase (years)	Under <b>Payments</b> Tab in Xplan
Maturity Date	✗	-	No Xplan API available
Guarantee Period	✗	-	No Xplan API available
CPI Percentage %	✗	-	No Xplan API available
Tax Free Percentage %	✗	-	No Xplan API available
RCV Percentage %	✗	-	No Xplan API available
Tax Deductible Percentage	✓	Tax Deductible Percentage	Under <b>Payments</b> Tab in Xplan
Tax Deductible Amount	✗	-	No Xplan API available
Centrelink Deductible Amount	✓	Centrelink Deductible Amount	Under <b>Payments</b> Tab in Xplan
<b>Owner</b>	✗	-	No Xplan API available
<b>Beneficiaries</b>	✗	-	No Xplan API available
<b>Asset Class</b>	✗	-	No Xplan API available

## Other

Sync to Financial Information -> **Assets & Liabilities** -> **Assets**

DASH Field Name	Sync	Xplan Field Name	Notes
Name	✓	Description	Sync to Investments -> Other Investments
Account Number	✓	Policy Number	-
Market Value \$	✓	Current Value \$	-
Unit	✗	-	No equivalent field in Xplan
Unit Price	✗	-	No equivalent field in Xplan
Income / Interest %	✗	-	No equivalent field in Xplan
Purchase Price \$	✓	Initial Value \$	Under <b>Values</b> Tab in Xplan
Purchase Date	✓	Acquisition Date	Under <b>Values</b> Tab in Xplan
Maturity Date	✗	-	No equivalent field in Xplan
Management Cost %	✗	-	No equivalent field in Xplan
Regular Investment (p.a.)	✗	-	No equivalent field in Xplan
<b>Owner</b>	✓	Owners	Owner Percentage also syncs and updates
<b>Beneficiaries</b>	✗	-	No Xplan API available

Asset Class		-	No Xplan API available
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### 7.3 Add Super Contribution History

This section does not sync as there are no equivalent fields in Xplan.

### 7.4 Add Super Withdrawal History

This section does not sync as there are no equivalent fields in Xplan.

## 8.0 Insurances

**Important Note:** Xplan API does not allow insurance to be updated after it has previously been synced. Therefore, insurance will only sync once to Xplan in the initial sync.

### 8.1 Add Insurances

DASH Field Name	Sync	Xplan Field Name	Notes
Policy Number	✓	Policy number	-
Insurance Company	✓	Plan Name	-
Type ↓ (Whole Life, Endowment, Term)	✓	Type ↓ (Whole Life, Endowment, Term)	-
Policy Owners	✓	Client	Xplan put all the insurance under the main <b>Client</b> .
Life Insured ↓ (Contact)	✗	-	No Xplan API available
Part of Super ↓ (Yes, No)	✗	-	No Xplan API available

### 8.2 Life Cover – Death (Term life)

DASH Field Name	Sync	Xplan Field Name	Notes
Type ↓ ()	✗	-	No Xplan API available
Premium \$	✓	Total Premium \$	Total Premium is calculated by adding all the premiums under each policy.
Premium Frequency ↓ ()	✓	Premium frequency ↓ (Yearly)	Premiums are converted to yearly before adding them altogether.
Sum Insured \$	✓	Sum insured \$	-
Cover Description	✗	-	No Xplan API available
Commencement Date	✗	-	No Xplan API available
Renewal Date	✗	-	No Xplan API available
Premium Details ↓ ()	✗	-	No Xplan API available
Loading %	✗	-	No Xplan API available
Exclusions	✗	-	No Xplan API available

### 8.3 TPD Cover – Permanent disablement (TPD)

DASH Field Name	Sync	Xplan Field Name	Notes
Type ↓ ()	✗	Definition ↓ ()	<ol style="list-style-type: none"> <li>Any Occupation = Any Occupation</li> <li>Own Occupation = Own Occupation</li> <li><u>Super Linked</u> = Does not sync</li> <li>Home Maker = Home duties</li> <li>Independent Living = Activities of daily living</li> <li><u>Non-Working</u> = Does not sync</li> </ol>
Premium \$	✓	Total Premium \$	Total Premium is calculated by adding all the premiums under each policy.
Premium Frequency ↓ ()	✓	Premium frequency ↓ (Yearly)	Premiums are converted to yearly before adding them altogether.
Sum Insured* \$	✓	Sum insured \$	-
Cover Description	✗	-	No Xplan API available
Commencement Date	✗	-	No Xplan API available
Renewal Date	✗	-	No Xplan API available
Waiting Period	✗	-	No Xplan API available
Premium Details ↓ ()	✗	-	No Xplan API available
Loading %	✗	-	No Xplan API available
Exclusions	✗	-	No Xplan API available

### 8.4 Income Protection Cover

DASH Field Name	Sync	Xplan Field Name	Notes
Type ↓ ()	✗	Definition ↓ ()	Basic = Comprehensive =
Premium \$	✓	Total Premium \$	Total Premium is calculated by adding all the premiums under each policy.
Premium Frequency ↓ ()	✓	Premium frequency ↓ (Yearly)	Premiums are converted to yearly before adding them altogether.
Sum Insured* \$	✓	Sum insured \$	-
Sum Insured Frequency			
Cover Description	✗	-	No Xplan API available
Cover Definition			
Commencement Date	✗	-	No Xplan API available

Renewal Date		-	No Xplan API available
Waiting Period		-	No Xplan API available
Benefit Period			
Premium Details ↓ ( )		-	No Xplan API available
Loading %		-	No Xplan API available
Exclusions		-	No Xplan API available

### 8.5 Trauma Cover – Trauma (Critical Illness)

DASH Field Name	Sync	Xplan Field Name	Notes
Type ↓ (Basic, Comprehensive)		-	No Xplan API available
Premium \$		Total Premium \$	Total Premium is calculated by adding all the premiums under each policy.
Premium Frequency ↓ ( )		Premium frequency ↓ (Yearly)	Premiums are converted to yearly before adding them altogether.
Sum Insured \$		Sum insured \$	-
Cover Description		-	-
Commencement Date		-	No Xplan API available
Renewal Date		-	No Xplan API available
Premium Details ↓ ( )		-	-
Loading %		-	-
Exclusions		-	-

### 8.6 Business Expense – Business expense

DASH Field Name	Sync	Xplan Field Name	Notes
Type ↓ (Basic, Comprehensive)		-	No Xplan API available
Premium \$		Total Premium \$	Total Premium is calculated by adding all the premiums under each policy.
Premium Frequency ↓ ( )		Premium frequency ↓ (Yearly)	Premiums are converted to yearly before adding them altogether.
Sum Insured \$		Sum insured \$	-
Sum Insured Frequency ↓ ( )		-	No Xplan API available
Cover Description		-	No Xplan API available
Commencement Date		-	No Xplan API available
Renewal Date		-	No Xplan API available

Waiting Period		-	No Xplan API available
Benefit Period		-	No Xplan API available
Premium Details ↓ ()		-	No Xplan API available
Loading %		-	No Xplan API available
Exclusions		-	No Xplan API available

## 9.0 Insurance Need Analysis







This section does not sync as there are no equivalent fields in Xplan.

## 10.0 Social Security

This section does not sync as there are no equivalent fields in Xplan.

## 11.0 Estate Planning

### 11.1 Will Details

DASH Field Name	Sync	Xplan Field Name	Note
Will exists? ↓ (Yes, No)		Will exists? ↓ (Yes or No)	-
Last review date		Date of Will	-
Location of will		Location	-
Executor Name		-	No Xplan API available
Testamentary trust exists? ↓ (Yes, No)		-	No Xplan API available
Who has Potential Claim on Estate?		-	No Xplan API available

### 11.2 Power of Attorney

DASH Field Name	Sync	Xplan Field Name	Notes
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Type ↓ ()	✓	Type ↓ (Enduring, Medical, Normal)	<ol style="list-style-type: none"> <li>1. General = Normal</li> <li>2. Enduring = Enduring</li> <li>3. Medical = Medical</li> <li>4. Financial = Normal</li> <li>5. Guardianship = Normal</li> </ol>
Category ↓ ()	✗	-	No Xplan API available
Attorney First Name	✓	First Name	-
Attorney Last Name	✓	Surname	-



# Sync Xplan to DASH

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

## 1.0 Key Details

### 1.1 Key Details

Xplan Field Name	Sync	DASH Field Name	Notes
Title ↓ (Mr., Mrs., Miss, Ms., Dr., Prof.)	✓	Title ↓ (Mr, Mrs, Miss, Dr, Ms, Professor)	-
First Name	✓	First Name	-
Second Name	✓	Middle Name	-
Preferred Name	✓	Preferred Name	-
Surname	✓	Last Name	-
Last Previous Name	✗	-	No equivalent field in DASH
Gender ↓ (Male, Female)	✓	Gender ↓ (Male, Female, Unspecified)	-
Date of Birth	✓	Date of Birth	-
Marital Status ↓ ()	✓	Marital Status ↓ ()	<ol style="list-style-type: none"> <li>1. Single = Single</li> <li>2. Married = Married</li> <li>3. Separated = Separated</li> <li>4. Divorced = Divorced</li> <li>5. De Facto = De Facto</li> </ol>
Nationality ↓ ()	✗	-	No equivalent field in DASH
Country of Birth ↓ ()	✗	-	No equivalent field in DASH
Tax Resident Status ↓ (Resident, Non Resident)	✓	Australian Tax Resident ↓ (Yes, No)	Resident = Yes Non Resident = No
Smoker ↓ (Yes, No)	✓	Smoker ↓ (Yes or No)	-
Health ↓ (Excellent, Good, Poor)	✗	-	No Xplan API available

## 1.2 Contact Details

Xplan Field Name	Sync	DASH Field Name	Notes
Email ↓ (Email Types)	✓	Email ↓ (home, work, postal others)	All Emails are synced as "Others" to DASH
Phone ↓ (Phone Types)	✓	Phone ↓ (mobile, home, work, others, fax)	-
Address ↓ (Address Types)	✓	Address ↓ (home, work, postal, others)	All Addresses are synced as "Home" to DASH
Preferred ↓ (Yes, No)	✓	Set as Default	-

## 1.3 Dependents

Xplan Field Name	Sync	DASH Field Name	Notes
Title	✗	-	No equivalent field in DASH
Surname	✓	Name	-
First Name	✓	Name	-
Language	✗	-	No equivalent field in DASH
Relation ↓ ()	✓	Relationship	-
Related to ↓ ()	✓	Responsible of ↓ (Contact)	-
Date of Birth	✓	Date of Birth	-
Gender ↓ (Male, Female)	✗	-	No equivalent field in DASH
Financial Dependant ↓ ()	✓	Financial Dependant ↓ ()	-
Dependant Until Age	✓	Dependant till Age	-
Comments	✗	-	No equivalent field in DASH

## 2.0 Objectives

### 2.1 Financial

Xplan Field Name	Sync	DASH Field Name	Notes
Type ↓ (Financial, Lifestyle)	✗	-	No Xplan API available
Standard Options ↓ ()	✗	-	No Xplan API available
Timeframe ↓ ()	✗	-	No Xplan API available
Description	✓	Description	-
Time Frame (Years)	✓	Timeframe	-
Time Frame (Months)	✗	-	No equivalent field in DASH
Target Amount	✓	Amount \$	-
Priority ↓ ()	✗	-	No Xplan API available
Owner ↓ (Contact)	✓	Owner ↓ (Contact)	-
Category ↓ ()	✗	-	No equivalent field in DASH
Capture Date	✗	-	No Xplan API available
Client Target Age	✗	-	No Xplan API available
Comment	✗	-	No Xplan API available
Partner Target Age	✗	-	No Xplan API available
Advice Type ↓ ()	✗	-	No Xplan API available
Status ↓ (Open, Completed, Cancelled)	✓	Status ↓ (Current, Amended, Achieved, Cancelled)	<ol style="list-style-type: none"> <li>1. Open = Current</li> <li>2. Completed = Achieved</li> <li>3. Cancelled = Cancelled</li> </ol>

### 3.0 Financial Information

#### 3.1 Income

Xplan Field Name	Sync	DASH Field Name	Notes
Sub-Type ↓ ()	✓	Type ↓ ()	<ol style="list-style-type: none"> <li>1. Annuity Income = Other</li> <li>2. Bonuses = Bonus</li> <li>3. Business Income = Other</li> <li>4. Commissions = Other</li> <li>5. Fringe Benefits/ Salary Sacrifice = Other</li> <li>6. Investment: Dividends = Investment/Rent</li> <li>7. Investment: Interest = Investment/Rent</li> <li>8. Investment: Other Income = Investment/Rent</li> <li>9. Investment: Rental = Investment/Rent</li> <li>10. Lifestyle Income = Family Maintenance</li> <li>11. Ordinary Wages = Gross Salary</li> <li>12. Other Income = Other</li> <li>13. Pension Income = Other</li> <li>14. Royalties = Other</li> <li>15. Trade Income = Other</li> </ol>
Description	✓	Description	-
Owner ↓ (Contact)	✓	Owner ↓ (Contact)	-
Fixed/Variable	✗	-	No equivalent field in DASH
Frequency ↓ ()	✓	Frequency ↓ ()	<ol style="list-style-type: none"> <li>1. Weekly = Weekly</li> <li>2. Fortnightly = Fortnightly</li> <li>3. Twice a month = Fortnightly</li> <li>4. Four weekly = Monthly</li> <li>5. Monthly = Monthly</li> <li>6. Bi-monthly = One-off</li> <li>7. Quarterly = Quarterly</li> <li>8. Half-yearly = Half-yearly</li> <li>9. Yearly = Annually</li> <li>10. Single = One-Off</li> </ol>

			11. Custom-monthly = Annually
Amount \$	✓	Amount \$	-
Annual Increase	✗	-	No equivalent field in DASH
Start Date	✓	Start Date	-
End Date	✓	End Date	-
Future Amount	✗	-	No equivalent field in DASH

### 3.2 Expense

Xplan Field Name	Sync	DASH Field Name	Notes
Type ↓ () / Sub-Type ↓ ()	✓	Type ↓ ()	<ol style="list-style-type: none"> <li>1. Housing / Other Savings = Lifestyle Needs</li> <li>2. Contributions / Post Tax Contributions = Super Contributions</li> <li>3. Debt-Long Term / Mortgage Payments = Mortgage Repayments</li> <li>4. Taxes / Income Tax = Income Tax</li> <li>5. Insurance / Life = Insurance</li> <li>6. Debt-Short Term / Credit Cards = Debt Repayments =</li> <li>7. Other Expenditure / Other Expenditure = Other</li> </ol>
Description	✓	Description	-
Owner ↓ (Contact)	✓	Owner ↓ (Contact)	-
Fixed/ Variable ↓ ()	✗	-	No equivalent field in DASH
Frequency ↓ ()	✓	Frequency ↓ ()	<ol style="list-style-type: none"> <li>1. Weekly = Weekly</li> <li>2. Fortnightly = Fortnightly</li> <li>3. Twice a month = Fortnightly</li> <li>4. Four weekly = Monthly</li> <li>5. Monthly = Monthly</li> <li>6. Bi-monthly = One-off</li> <li>7. Quarterly = Quarterly</li> <li>8. Half-yearly = Half-yearly</li> <li>9. Yearly = Annually</li> <li>10. Single = One-Off</li> <li>11. Custom-monthly = Annually</li> </ol>

Amount \$	✓	Amount \$	-
Annual Increase ↓ ()	✗	-	No equivalent field in DASH
Start Date	✗	-	No Xplan API available
End Date	✗	-	No Xplan API available

### 3.3 Assets – General

Xplan Field Name	Sync	DASH Field Name	Notes
Type ↓ () / Asset Type ↓ ()	✓	Type ↓ ()	<ol style="list-style-type: none"> <li>1. Real Estate / Primary Residence = Principal Residence</li> <li>2. Life Style / Household Contents = Home Contents</li> <li>3. Life Style / Motor Vehicle = Motor Vehicles</li> <li>4. Life Style / Antiques = Collectibles</li> <li>5. Life Style / Artwork = Collectibles</li> <li>6. Life Style / Other Life Style = Other</li> </ol>
Policy Number	✗	-	No Xplan API available
Current Value \$	✓	Market Value \$	-
Recommended Value	✗	-	No Xplan API available
Description	✓	Name	-
Owner ↓ (Contact)	✓	Owner ↓ (Contact)	-
Initial Value \$	✓	Purchase Price \$	-
Capital Withdrawal Amount \$	✗	-	No Xplan API available
Establishment Date	✗	-	No Xplan API available

### 3.4 Assets – Investment

Xplan Field Name	Sync	DASH Field Name	Notes
Type ↓ () / Asset Type ↓ ()	✓	Investment Type ↓ ()	<p><b><u>Xplan Type / Asset Type -&gt; DASH Type</u></b></p> <ol style="list-style-type: none"> <li>Investments / Platforms -&gt; Platforms</li> <li>Investments / Stocks -&gt; Shares</li> <li>Investments / Unit Trusts -&gt; Managed Fund</li> <li>Investments / Bonds -&gt; Bond</li> <li>Investments / Other Investments -&gt; Other</li> <li>Retirement / Annuity -&gt; Annuity</li> <li>Liquid Assets / Cash on Hand -&gt; Cash</li> <li>Real Estate / Investment Property -&gt; Property</li> </ol>
Policy Number	✓	Account Number	-
Current Value \$	✓	Amount \$	-
Description	✓	Name	-
Owner ↓ (Contact)	✓	Owner ↓ (Contact)	-
Initial Value \$	✓	Purchase Price \$	-
Purchase Date	✓	Acquisition Date	-

### 3.5 Liabilities

Xplan Field Name	Sync	DASH Field Name	Notes
Type ↓ () and Sub-Type ↓ ()	✓	Liability Type ↓ ()	<p><b><u>Current</u></b></p> <ol style="list-style-type: none"> <li>Credit Card Balances = Current/ Short term – Credit Card</li> <li>Outstanding Payment = Current/ Short term – Outstanding Payments</li> <li>Other Loans = Current/ Short term – General/ Other Loan</li> <li>Overdraft = Current/ Short term – Overdraft</li> </ol> <p><b><u>Long Term</u></b></p> <ol style="list-style-type: none"> <li>Primary Residence Mortgage = Long term – Primary Residence Loan</li> </ol>

			<p>2. Investment Property Mortgage = Long term – Investment Property Mortgage</p> <p>3. Car Loan = Long term – Car Loan</p> <p>4. Education Loans = Long term – Education Loan</p> <p>5. Personal Loans = Long Term – Personal Loan</p> <p>6. Other Loans = Long term – General/ Other Loan</p> <p>7. Margin Loan = Long term – Margin Loan</p> <p><b>Contingent</b></p> <p>1. Limited = Contingent – Limited</p> <p>2. Joint and Several = Contingent – Joint and Several</p>
Package/ Product Name	✓	Name	-
Policy Number	✓	Account Number	-
Outstanding Balance	✓	Outstanding Balance	-
Account/ Client Number	✗	-	No Xplan API available
Institution	✗	-	No Xplan API available
Owner ↓ (Contact)	✓	Owner ↓ (Contact)	-
Interest Rate Type ↓ (Fixed, Variable)	✓	Rate Type ↓ (Fixed, Variable, Split, Not Specified)	Fixed = Fixed Variable = Variable
Interest Rate p.a. %	✓	Interest Rate (p.a.) %	-
Revert Rate p.a	✗	-	No Xplan API available
Interest Only Term (years)	✗	-	No Xplan API available
Start Date	✓	Rate Start Date	-
End Date	✓	Rate End Date	-
Fixed Rate Term	✗	-	No Xplan API available
Loan Term	✗	-	No Xplan API available
Repayment Amount \$	✓	Repayment Amount \$	-
Repayment Frequency ↓ ( )	✓	Repayment Frequency ↓ ( )	Weekly = Weekly Fortnightly = Fortnightly Monthly = Monthly Quarterly = Quarterly



			Half Yearly = Half Yearly Yearly = Yearly Single = One-Off
Repayment Type	✗	-	No Xplan API available

### 3.6 Super

Sync to Super & Pension -> **Super (Platform)**

Xplan Field Name	Sync	DASH Field Name	Notes
Owner ↓ (Client, Partner)	✓	Owner ↓ (Contact)	-
Type ↓ (Defined Benefit, Accumulation, Pension, Income Stream)	✓	Type ↓ ()	-
Super Plan Selection ↓ ()	✗	-	No equivalent field in DASH
Super Plan	✓	Name	-
Reference Number	✓	Account Number	-
Eligible Service Date	✓	Eligible Service Date	-
Total Balance \$	✓	Total Balance \$	Xplan calculates its Total Balance by adding Taxed Element and Tax Free
Date of Balane	✗	-	No Xplan API available
Taxable – Taxed Element \$	✓	Taxed Element	Under <b>Balances</b> Tab in Xplan
Taxable – Untaxed Element \$	✗	-	No Xplan API available
Tax Free \$	✓	Tax Free \$	Under <b>Balances</b> Tab in Xplan
Preserved Amount \$	✗	-	No Xplan API available
Restricted Non-Preserved \$	✗	-	No Xplan API available
Unrestricted Non-Preserved	✗	-	No Xplan API available

#### Add Super Details (Does not sync)

#### Add Beneficiaries

Beneficiary	✓	Name	
Nomination (checkbox)	✗	-	No equivalent field in DASH
Nomination Type ↓ ()	✓	Type ↓ ()	<ol style="list-style-type: none"> <li>1. Not specified = Binding</li> <li>2. Non-Binding = Non Binding</li> <li>3. Non-Lapsing = Non Lapsing</li> <li>4. Lapsing = Lapsing</li> <li>5. Reversionary = Binding</li> </ol>

Relationship	✓	Relationship	-
Amount %	✗	Proportion Of Benefit %	-
Amount \$	✓	Amount of Benefit \$	-
Remaining Balance			
Binding End	✓	Binding End Date	-
<b>Add Contributions</b>			
Start Date			
End Date			
Type ↓ ()			Concessional Non-concessional
Sub-Type			Concessional / Employer Contributions Concessional / Salary Sacrifice Concessional / Personal Deductible Concessional / Self-Employed Concessional / Notional Taxed Concessional / Not Specified Non- concessional / Personal Non- deductible Non- concessional / Spouse Contribution Non- concessional / Government Co- contribution Non- concessional / Low-income contribution Non- concessional / Excess Contribution Non- concessional / Not Specified
Frequency			
Amount			

### 3.7 Pension

Sync to Super & Pension -> **Pension (Platform)**

Xplan Field Name	Sync	DASH Field Name	Notes
Owner ↓ (Client, Partner)	✓	Owner ↓ (Contact)	-
Type ↓ ()	✓	Pension Type ↓ ()	<b>Xplan Type -&gt; Dash Pension Type</b> 1. Allocated Pension = Allocated

			<p>2. Term Allocated Pension = Term Allocated</p> <p>3. <u>Lifetime Pension</u> = Life Time (Doesn't sync Pension Balance as there is no field in Xplan)</p> <p>4. Life Expectancy Pension = Life Expectancy</p> <p>5. Fixed Term Pension = Fixed Term</p> <p>6. Account Based Pension = Account Based</p> <p>7. Account Based Pension TTR = Account Based TTR</p>
Retirement Plan Selection ↓	✗	-	No equivalent field in DASH
Retirement Plan	✗	-	No equivalent field in DASH
Reference Number	✓	Account Number	-
Date of Balance	✗	-	No Xplan API available
Status ↓ ()	✗	-	No Xplan API available
Under Advice ↓ ()	✗	-	No equivalent field in DASH
Description	✓	Name	-
Date Submitted	✗	-	No Xplan API available
Purchase Date	✗	-	No Xplan API available
Purchase Price			
Term at Purchase (years)	✓	Term (Years)	-
Tax Free %	✗	-	No Xplan API available
Pension Balance \$	✓	Total Balance \$	Under <b>Values</b> Tab in Xplan
Payment Date			
Payment Type ↓ ()			Minimum Maximum Fixed
Payment	✓	Payment Amount \$	-
Frequency ↓ ()	✓	Frequency ↓ ()	<p>1. Weekly = Weekly</p> <p>2. Fortnightly</p> <p>3. <u>Twice a month</u> = Doesn't Sync</p> <p>4. Monthly = Monthly</p> <p>5. Bi-monthly = Bi-monthly</p>

			6. Quarterly = Quarterly 7. Half-yearly = Half-yearly 8. Yearly = Yearly
Term at Purchase	✓	Term	Under <b>Details</b> Tab in Xplan
Payment Indexation			
Tax Deductible Percentage %	✓	Tax Deductible Percentage %	Under <b>Payments</b> Tab in Xplan
Centrelink Deductible Amount \$	✓	Centrelink Deductible Amount \$	Under <b>Payments</b> Tab in Xplan
<b>Add Beneficiaries (Does not sync)</b>			

### 3.8 Will & Testament

Xplan Field Name	Sync	DASH Field Name	Notes
Will Exists ↓ (Yes or No)	✓	Will Exists ↓ (Yes or No)	-
Is Will Current ↓ (Yes or No)	✗	-	No equivalent field in DASH
Date of Will	✓	Last review date	-
Have Testamentary Trust ↓ (Yes, No, Not disclosed)	✗	-	No Xplan API available
Location	✓	Location of will	-
Notes	✗	-	No equivalent field in DASH

### 3.9 Power of Attorney & Guardianship

Xplan Field Name	Sync	DASH Field Name	Notes
Type ↓ (Enduring, Medical, Normal)	✓	Type ↓ (General, Enduring, Medical, Financial, Guardianship)	1. Enduring = Enduring 2. Medical = Medical 3. Normal = General
Surname	✓	Attorney Last Name	-
First name	✓	Attorney First Name	-
Notes	✗	-	No equivalent field in DASH

### 4.0 Insurance

#### 4.1 Existing – By Policy Owner

Xplan Field Name	Sync	DASH Field Name	Notes
------------------	------	-----------------	-------

Type ↓ (Whole Life, Endowment, Term)	✓	Type ↓ (Whole Life, Endowment, Term)	-
Policy Number	✓	Policy Number	-
Underwriter ↓ ()	✗	-	No Xplan API available
Plan Name	✓	Insurance Company	-
Policy Status ↓ ()	✗	-	No Xplan API available
Lapsed/ Cancelled Date	✗	-	No Xplan API available
Under Advice	✗	-	No Xplan API available
Total Premium \$	✗	-	No Xplan API available
Premium Frequency ↓ ()	✗	-	No Xplan API available

#### 4.2 Life Cover

Xplan Field Name	Sync	DASH Field Name	Notes
Type ↓ ()	✗	-	No Xplan API available
Sum Insured	✓	Sum Insured \$	-
Life Insured	✗	-	No Xplan API available
Benefit Status ↓ ()	✗	-	No Xplan API available
Premium Structure ↓ ()	✗	-	No Xplan API available
Description	✗	-	No Xplan API available
Cover Escalation ↓ ()	✗	-	No Xplan API available
Is Super ↓ ()	✗	-	No Xplan API available
Owner ↓ (Contacts)	✗	-	No Xplan API available
Renewal Date	✗	-	No Xplan API available
Issue Date	✗	-	No Xplan API available

#### 4.3 TPD Cover

Xplan Field Name	Sync	DASH Field Name	Notes
Type ↓ ()	✗	-	No Xplan API available
Sum Insured	✓	Sum Insured \$	-
Life Insured	✗	-	No Xplan API available
Benefit Status ↓ ()	✗	-	No Xplan API available
Premium Structure ↓ (Hybrid, Level, Stepped)	✗	-	No Xplan API available

Description	✘	-	No Xplan API available
Cover Escalation ↓ ()	✘	-	No Xplan API available
Is Super ↓ ()	✘	-	No Xplan API available
Owner ↓ (Contacts)	✘	-	No Xplan API available
Renewal Date	✘	-	No Xplan API available
Issue Date	✘	-	No Xplan API available

#### 4.4 Income Protection

Xplan Field Name	Sync	DASH Field Name	Notes
Type ↓ ()	✘	-	No Xplan API available
Life Insured	✘	-	No Xplan API available
Benefit Status ↓ ()	✘	-	No Xplan API available
Definition ↓ ()	✘	-	No Xplan API available
Benefit Amount \$	✔	Sum Insured \$	Benefit Amount is synced as yearly amount.
Benefit Frequency ↓ ()	✘	-	No Xplan API available
Accident/ Benefit Period ↓ ()	✘	-	No Xplan API available
Waiting Period ↓ ()	✘	-	No Xplan API available
Premium Structure ↓ ()	✘	-	No Xplan API available
Description	✘	-	No Xplan API available
Cover Escalation ↓ ()	✘	-	No Xplan API available
Is Super ↓ ()	✘	-	No Xplan API available
Owner ↓ (Contacts)	✘	-	No Xplan API available
Renewal Date	✘	-	No Xplan API available
Issue Date	✘	-	No Xplan API available

#### 4.5 Trauma Cover

Xplan Field Name	Sync	DASH Field Name	Notes
Type ↓ ()	✘	-	No Xplan API available
Sum Insured	✔	Sum Insured \$	-

Life Insured	✘	-	No Xplan API available
Benefit Status ↓ ()	✘	-	No Xplan API available
Premium Structure ↓ ()	✘	-	No Xplan API available
Description	✘	-	No Xplan API available
Cover Escalation ↓ ()	✘	-	No Xplan API available
Is Super ↓ ()	✘	-	No Xplan API available
Owner ↓ (Contacts)	✘	-	No Xplan API available
Renewal Date	✘	-	No Xplan API available
Issue Date	✘	-	No Xplan API available

#### 4.6 Business Expense

Xplan Field Name	Sync	DASH Field Name	Notes
Type ↓ ()	✘	-	No Xplan API available
Life Insured	✘	-	No Xplan API available
Benefit Status ↓ ()	✘	-	No Xplan API available
Definition ↓ ()	✘	-	No Xplan API available
Benefit Amount \$	✔	Sum Insured \$	Benefit Amount is synced as yearly amount.
Benefit Frequency ↓ ()	✘	-	No Xplan API available
Accident/ Benefit Period ↓ ()	✘	-	No Xplan API available
Waiting Period ↓ ()	✘	-	No Xplan API available
Premium Structure ↓ ()	✘	-	No Xplan API available
Description	✘	-	No Xplan API available
Cover Escalation ↓ ()	✘	-	No Xplan API available
Is Super ↓ ()	✘	-	No Xplan API available
Owner ↓ (Contacts)	✘	-	No Xplan API available
Renewal Date	✘	-	No Xplan API available
Issue Date	✘	-	No Xplan API available
Term			
Issue Status			
Accident Short Waiting Period			

#### 4.7 Additional Rider Benefit Insurance

Xplan Field Name	Sync	DASH Field Name	Notes
Type ↓ ()	✗	-	No Xplan API available
Life Insured	✗	-	No Xplan API available
Benefit Status ↓ ()	✗	-	No Xplan API available
Sum Insured \$	✓	Sum Insured \$	Benefit Amount is synced as yearly amount.
Benefit Frequency ↓ ()	✗	-	No Xplan API available
Accident/ Benefit Period ↓ ()	✗	-	No Xplan API available
Waiting Period ↓ ()	✗	-	No Xplan API available
Premium Structure ↓ ()	✗	-	No Xplan API available
Description	✗	-	No Xplan API available
Cover Escalation ↓ ()	✗	-	No Xplan API available
Is Super ↓ ()	✗	-	No Xplan API available
Owner ↓ (Contacts)	✗	-	No Xplan API available
Renewal Date	✗	-	No Xplan API available
Issue Date	✗	-	No Xplan API available
Buy Back ↓ ()	✗	-	No Xplan API available
Loading Expiry Date	✗	-	No Xplan API available
Issue Status ↓ ()	✗	-	No Xplan API available
Term ↓ ()	✗	-	No Xplan API available

#### 4.8 Severity Based Insurance

Xplan Field Name	Sync	DASH Field Name	Notes
Type ↓ ()	✗	-	No Xplan API available
Life Insured	✗	-	No Xplan API available
Benefit Status ↓ ()	✗	-	No Xplan API available
Sum Insured \$	✓	Sum Insured \$	
<b>Additional Death Cover</b>			
Premium Structure ↓ ()	✗	-	No Xplan API available
Description	✗	-	No Xplan API available
Cover Escalation ↓ ()	✗	-	No Xplan API available



Is Super ↓ ()	✘	-	No Xplan API available
Owner ↓ (Contacts)	✘	-	No Xplan API available
Renewal Date	✘	-	No Xplan API available
Issue Date	✘	-	No Xplan API available
Issue Status ↓ ()	✘	-	No Xplan API available