USER GUIDE

Fin365 CONNECTOR (User Guide and Data Mapping)

Contents

Introduction

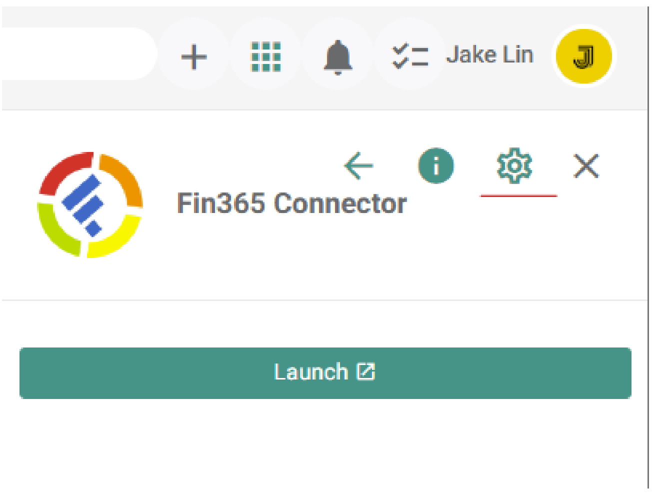
This user guide will show the how to set up Fin365 Connector in DASH and detailed mapping of the fields between DASH and FIN365, showing which fields sync, and which fields do not sync.

Setting Up Fin365 Connector

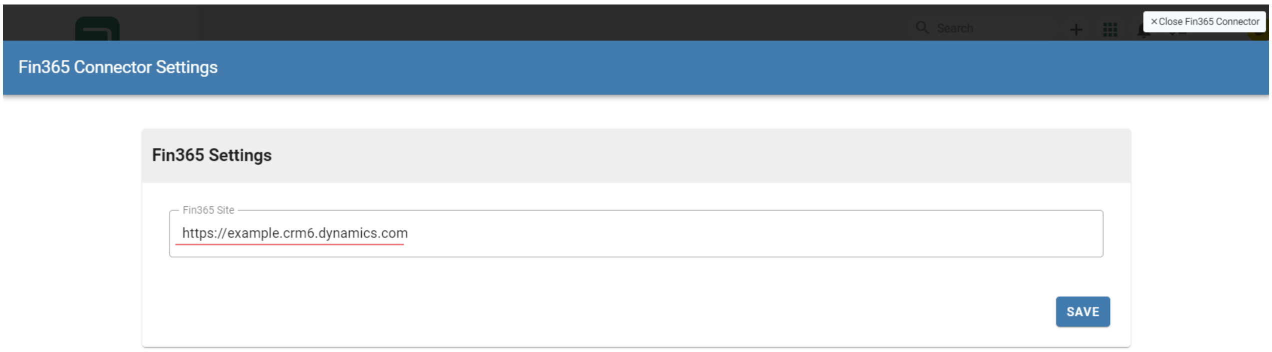
After subscribing and adding a licence for the Connector in DASH, you will need to provide a link to your site to the Fin365 Connector App Settings.

For the initial setup for the Connector, please complete the steps shown below:

1. In DASH, Click on **Apps**
2. Click on **Fin365 Connector**
3. Click on **App Settings** denoted by the cog icon



4. Add your **Site** to the displayed Site field
5. Click on **Save**
6. Click **Close Fin365 Connector** to leave App Settings



Note: During first sign in Microsoft login page after launching the Fin365 Connector, you will be asked to grant permission for Fin365 Connector to communication with your environment. Normally, admin user in Fin365 has right to Grant permission.

Launching the Fin365 Connector

You do not need to select a contact to use the Fin365 Connector and can be launched from the Home page. You can launch the Fin365 Connector by:

1. Click on **Apps**, located at the top right of the screen
2. Click on **Fin365 Connector**
3. Click on **Launch**

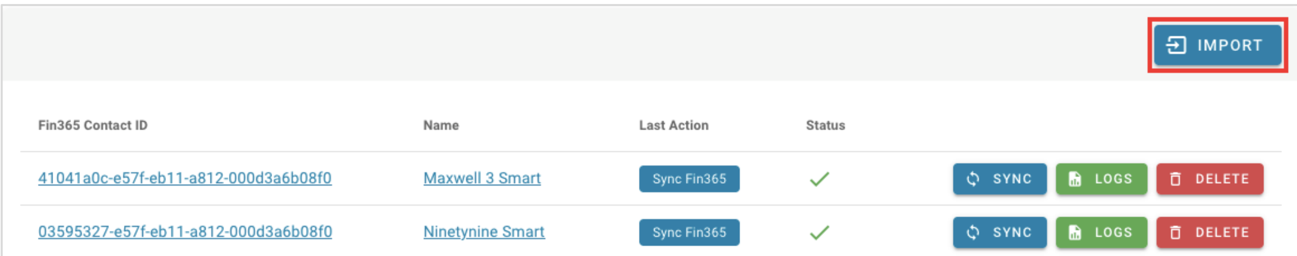
Actions within Fin365 Connector

The Fin365 Connector will enable you to:

A. Import clients from
B. Map client in DASH to
Note: Currently you cannot create a new client/household in Fin365 directly from DASH. You will need to create the client/household in Fin365 first then map the client in order to push DASH data to Fin365.

You can select the required action by following the steps below:

1. Click on the **IMPORT** button
   - **Note:** This will reveal two options; **Import client** and **Map client**.



2. Click on **Import client** and **Map client**

Import Client

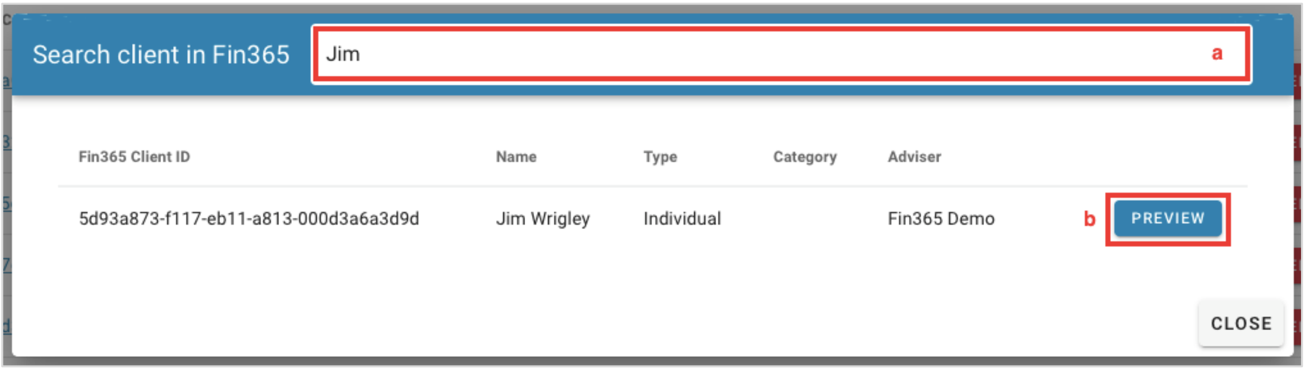
This option will allow you to import clients from Fin365 to DASH.

Below is the process you will need to follow to import Fin365 contacts to DASH.

a. Search for the contact from Fin365 that you want to import to DASH using the search bar
   - **Note:** When searching, please only search one term e.g. first name.

b. Click on **PREVIEW**

c. In the displayed preview, click on **IMPORT**

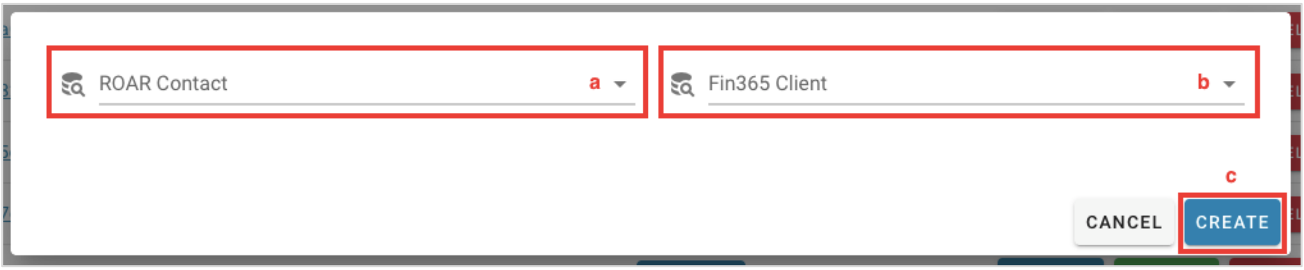


This will create a mapping which will appear in the board of the Fin365 Connector. If successful, the status should have a green checkmark. If the status has a red x, then you will need to view the logs to see the error that has been recorded.

Map Client

This option will allow you to map or link clients who already exist in both Fin365 and DASH. Mapping will ensure that you do not create duplicate clients. Once mapped, you can then sync information between DASH and Fin365.

Click on **Map Client** and search for the Contact/Client that you want to map in both DASH and Fin365, then click on **CREATE**.

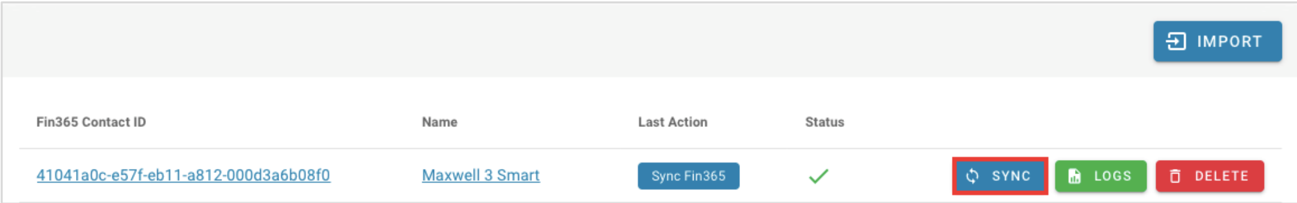


Syncing Clients

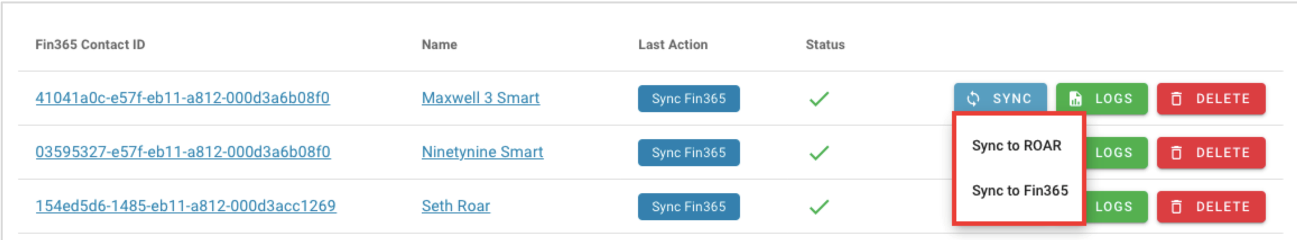
When contacts have been mapped correctly, a green checkmark status appears and you can sync the contact to either Fin365 or DASH. Syncing contacts will update the details of the client so changes made in DASH can be pushed to Fin365 and vice versa.

You can sync data between Fin365 and DASH by doing the following.

1. Click on **SYNC** for the contact you want to update.



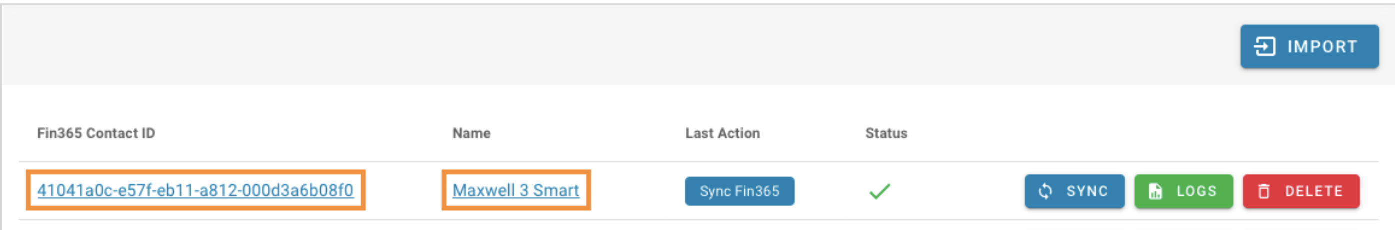
2. Select either **Sync to DASH** or **Sync to**
   - '**Sync to DASH'** will update the client data of the selected client/contact using the data from Fin365.
   - Selecting '**Sync to Fin 365'** will update the selected client data in Fin365 using the data from DASH.



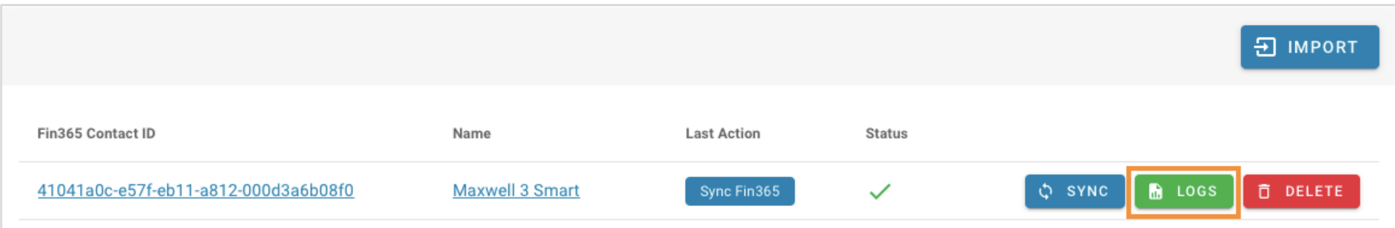
If this process is successful, you will see a green checkmark in the status column for the contact you had synced.

Mapping and Logs

After importing a contact from Fin365, a mapping will be created. Clicking on the **Name** of the mapping will open the contact in DASH in a new tab, while clicking on the Fin365 **Contact ID** will open the client in Fin365.

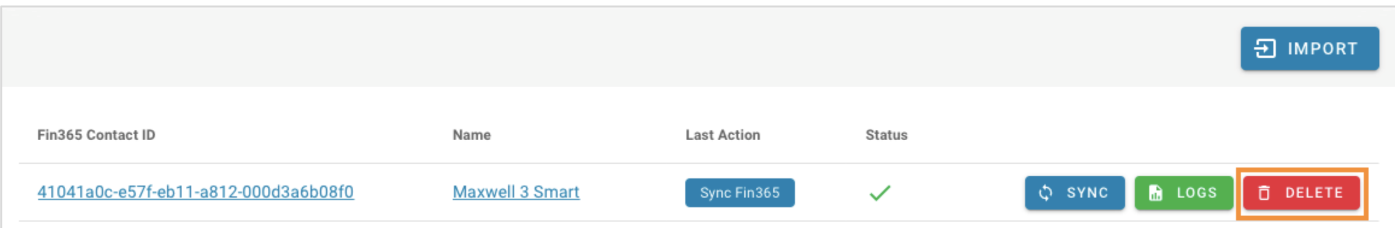


Clicking on **LOGS** will display a record of actions related to that particular mapping. Errors will also be logged there so you will be able to take a look at the error(s) for a particular mapping if their status is a red X.



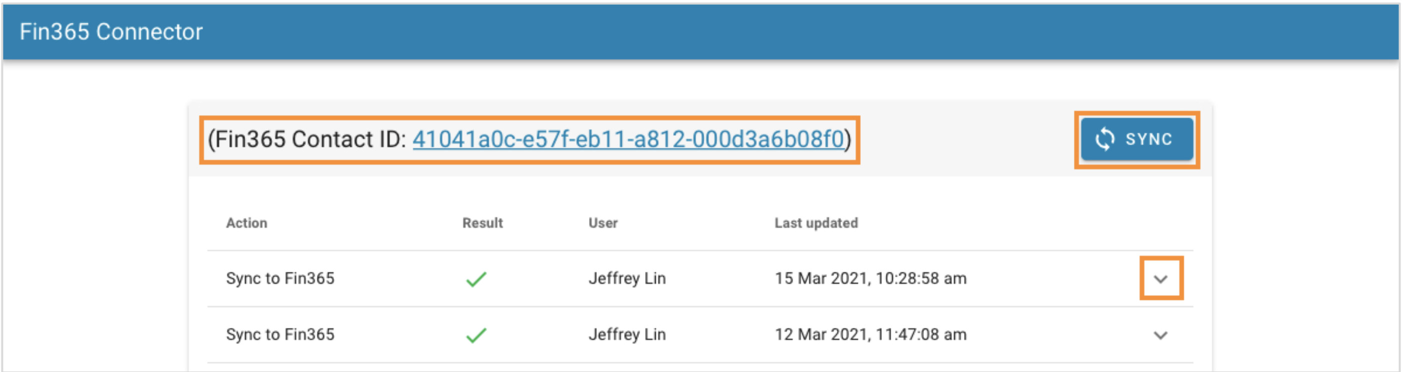
Looking at the errors log can help to identify the cause of an error. In instances where the error is cause by missing data like a client's gender, you can add the missing data and attempt complete the action again. A log can be expanded by clicking on the V.

Clicking on **DELETE** will remove the mapping from the Fin365 Connector. Deleting the mapping will not delete the contacts in either Fin365 or DASH, it will only remove the mapping.



Launching Fin365 Connector within a Contact.

When within a contact in DASH, you can also launch the Fin365 Connector, although you will see a different UI compared to launching from outside the contact (eg. launching from the Home page):



Contact ID

You can click on the **Fin365 Contact ID link** to open the client page in Fin365. It should open the link in a new tab so you should be able to navigate directly to that client in Fin365.

SYNC

Similar to the board when launching the Fin365 Connector from the Home screen, the SYNC button will allow you to either **Sync to DASH** or **Sync to Fin365.**

Logs

When launching within a contact in DASH, the logs for each action taken will be displayed as a list. The logs can be expanded by clicking on the **V** to display the details of a particular sync.

<u>Document Guide for Data Mapping</u>

* - Fields that are marked in asterisk are mandatory fields and must be entered to **sync** to Fin365.

↓ - This arrow key represents dropdown option.

✅ - Sync

❌ - Doesn't sync

⚠️ - Sync with limitations

Sync DASH to Fin365

The following tables show the detailed mapping of the DASH fields that sync to Fin365 fields.

1.0 General Information

DASH Field Name	Sync	Fin365 Field Name	Notes
Title ↓ ()	✅	Title ↓ ()	-
First Name*	✅	First Name	-
Middle Name	✅	Middle Name	-
Last Name*	✅	Last Name	-
Preferred Name	✅	Preferred name	-
About	❌	-	No equivalent field in Fin365
Owner ↓ (Contact)	✅	Client	-
Category ↓	❌	-	No equivalent field in Fin365
Referrer	❌	-	No equivalent field in Fin365
Gender ↓ ()	✅	Gender ↓ ()	-
Date of Birth	✅	Birthday	-
Email (default)	✅	Primary Email	-
Phone (default)	✅	Mobile Phone	<u>Country code</u> will not sync to Fin365.
Address (default)	✅	Address Details	-

2.0 Personal Details

2.1 Personal Details

DASH Field Name	Sync	Fin365 Field Name	Notes
Date of Death (if Deceased)	✘	-	No equivalent field in Fin365
Marital Status ↓ ()	✔	Marital Status ↓ ()	Will create a household in Fin365
Health State ↓ ()	✔	General Health	-
Private Health Cover ↓ ()	✔	Private Health Insurance?	-
Smoker ↓ (Yes, No)	✔	Smoker? ↓ ()	-
Australian Tax Resident ↓ ()	✘	-	No equivalent field in Fin365
Retirement Date	✘	-	No equivalent field in Fin365

2.2 Employment Details

DASH Field Name	Sync	Fin365 Field Name	Notes
Occupation	✘	-	No equivalent field in Fin365
Job Title	✔	Job Title	Will create a household in Fin365
Employer	✔	Employer	-
Employment Status ↓ ()	✔	Employment Status	-
Hours Worked Per Week	✘	-	No equivalent field in Fin365
Employment Start Date	✘	-	No equivalent field in Fin365

2.3 Employment Leave Details

This section does not sync as there are no equivalent fields in Fin365.

3.0 Dependants

Dependants will sync under the Household of the Client.

4.0 Advice Details

4.1 Reasons for Seeking Advice

This section does not sync as there are no equivalent fields in Fin365.

4.2 Goals

Sync to Client Goals under Household

DASH Field Name	Sync	Fin365 Field Name	Notes
Type ↓		Goal Category	Only sync as Others
Description		Goal Description	-
Start Date		Start Date	-
Amount		Amount?	-
Timeframe		-	-
Owners ↓		Household	Sync as Household (Joint)
Priority ↓		-	-
End Date		End Date	-
Status		-	-

4.3 Other Circumstances

This section does not sync as there are no equivalent fields in Fin365.

4.4 Risk Profiles

This section does not sync as there are no equivalent fields in Fin365.

4.5 Investment Preference

This section does not sync as there are no equivalent fields in Fin365.

5.0 Income and Expense

5.1 Income

DASH Field Name	Sync	Fin365 Field Name	Notes
Type ↓ ()	✓	Income Type ↓ ()	1. Gross Salary = Employment 2. Bonus = No Type 3. Centrelink/DVA = No Type 4. Investment/Rent = No Type 5. Related Trust Distributions = No Type 6. Family Maintenance = No Type 7. Tax-free income = No Type 8. Super Income Stream = No Type 9. Non-super Income Stream = No Type 10. Other = Other
Description	✗	-	No equivalent field in Fin365
Owner ↓ (Contact)	✓	Owner ↓ (Contact)	-
Amount $	✓	Net Income $	-
Frequency ↓ ()	✓	Frequency ↓ ()	1. One-off = Doesn't Sync Type 2. Daily = Doesn't Sync Type 3. Weekly = Weekly 4. Fortnightly = Fortnightly 5. Monthly = Monthly 6. Quarterly = Quarterly 7. Half-Yearly = Half Yearly 8. Annually = Yearly
Start Date	✗	-	No Fin365 API available
End Date	✗	-	No Fin365 API available
Taxable ↓ (Yes, No)	✗	-	No Fin365 API available

5.2 Expense

DASH Field Name	Sync	Fin365 Field Name	Notes
Type ↓ ()	✓	Expense Type ↓ ()	-
Description	✓	Name	-
Owner ↓ (Contact)	✓	Household ↓	Sync to Household expenses in Household.
Amount $	✓	Amount $	-
Frequency ↓ ()	✓	Expense Frequency ↓ ()	1. One-off = Doesn't Sync Type 2. Daily = Doesn't Sync Type 3. Weekly = Weekly 4. Fortnightly = Fortnightly 5. Monthly = Monthly 6. Quarterly = Quarterly 7. Half-Yearly = Half Yearly 8. Annually = Yearly
Start Date	✓	Start Date	-
End Date	✓	End Date	-
Taxable ↓ (Yes, No)	✗	-	No equivalent field in Fin365

6.0 Assets and Liabilities

6.1 Assets – General

DASH Field Name	Sync	Fin365 Field Name	Notes
Type ↓ ()	✓	Asset Type ↓ () / Asset Purpose ↓ ()	1. Principal Residence = Property / Lifestyle 2. Holiday Property = Property / Lifestyle 3. Home Contents = Other / Lifestyle Motor Vehicles = Other / Lifestyle 4. Boat = Other / Lifestyle 5. Caravan = Other / Lifestyle 6. Motorbike = Other / Lifestyle 7. Collectibles = Other / Lifestyle 8. Other = Other / Lifestyle
Name	✓	Friedly Name	-
Owner ↓ (Contact)	✓	Primary Client ↓ (Contact)	-
Purchase Date	✗	-	No equivalent field in Fin365
Purchase Price $	✗	-	No equivalent field in Fin365
Market Value $	✓	Current Balance $	-
As At Date	✗	-	No equivalent field in Fin365
Has Liability ↓ (Yes, No)	✗	-	No equivalent field in Fin365

6.2 Investment, Super and Pension

DASH - Asset (Type)	Sync	Fin365 - Asset Type (Purpose)	Notes
Investment (Platform)	✓	Investment Fund (Investment)	Name, Account Number, Market Value, Portfolio Holdings sync to Fin365
Investment (Annuity)	✗	-	No equivalent field in Fin365
Investment (Shares)	✓	Direct Shares (Investment)	Name, Account Number, Market Value sync to Fin365
Investment (Bond)	✓	Insurance Bond (Investment)	Name, Account Number, Market Value sync to Fin365
Investment (Managed Fund)	✓	Fixed Interest (Investment)	Name, Account Number, Market Value sync to Fin365
Investment (Cash)	✓	Cash Account (Investment)	Name, Account Number, Market Value sync to Fin365
Investment (Term Deposit)	✓	Term Deposit (Investment)	Name, Account Number, Market Value sync to Fin365
Investment (Property)	✓	Property (Investment)	Name, Account Number, Market Value sync to Fin365
Investment (Other)	✓	Other (Investment)	Name, Account Number, Market Value sync to Fin365
Super (Platform)	✓	Superannuation Account (Investment)	Name, Account Number, Market Value, Portfolio Holdings sync to Fin365
Super (Other)	✓	Defined Benefit (Investment)	Name, Account Number, Market Value sync to Fin365
Pension (Platform)	✓	Retirement Income Stream (Investment)	Name, Account Number, Market Value, Portfolio Holdings sync to Fin365
Pension (Annuity)	✗	-	No equivalent field in Fin365
Pension (Other)	✗	-	No equivalent field in Fin365

6.3 Liabilities

DASH Field Name	Sync	Fin365 Field Name	Notes
Liability Type* ↓ ()	✓	Type ↓ () and Sub-Type ↓ ()	1. Contingent – Joint and Several = No Type 2. Contingent – Limited = No Type 3. Long term – Car Loan = Car loan 4. Long term – Educational Loan = No Type 5. Long term – General/Other Loan = Other 6. Long term – Investment Property Mortgage = Investment loan 7. Long term – Personal Loan = Personal Loan 8. Long term – Primary Residence Loan = Home mortgage 9. Long term – Buy to Let Mortgage = No Type 10. Long term – Margin Loan = No Type 11. Current/Short term – Credit Card = Credit Card 12. Current/Short term – Outstanding Payments = No Type 13. Current/Short term – Overdraft = No Type 14. Current/Short term – General/Other Loan = No Type
Name	✓	Friendly Name	-
Account Number	✓	Account Number	-
Institution	✗	-	No Fin365 API available
Owner ↓ (Contact)	✓	Owner ↓ (Contact)	-
Outstanding Balance $	✓	Current Balance $	-
As At Date	✗	-	No Fin365 API available
Original Balance $	✗	-	No Fin365 API available
Date Commenced	✗	-	No Fin365 API available

Original Term	✗	-	No Fin365 API available
Term Remaining	✗	-	No Fin365 API available
Interest Rate (p.a.) %	✓	Interest Rate %	-
Rate Type ↓ ()	✗		No Fin365 API available
Rate Start Date	✗	Repayment -> Start Date	No Fin365 API available
Rate End Date	✗	Repayment -> End Date	No Fin365 API available
Fixed Rate Term Remaining	✗	-	No Fin365 API available
Interest Only Term Remaining	✗	-	No Fin365 API available
Repayment Type ↓ ()	✗	-	No Fin365 API available
Repayment Amount $	✓	Repayment $	-
Repayment Frequency ↓ ()	✓	Repayment Frequency ↓ ()	1. One-off = Doesn't Sync Type 2. Daily = Doesn't Sync Type 3. Weekly = Weekly 4. Fortnightly = Fortnightly 5. Monthly = Monthly 6. Quarterly = Quarterly 7. Half-Yearly = Half Yearly 8. Annually = Yearly
Payment Method ↓ ()	✗	-	No Fin365 API available
Repayment Start Date	✗	-	No Fin365 API available
Repayment End Date	✗	-	No Fin365 API available
Guarantor Name	✗	-	No Fin365 API available
Guarantor Asset Type ↓()	✗	-	No Fin365 API available
Deductible Percentage %	✗	-	No Fin365 API available
Secured Asset	✗	-	No Fin365 API available

8.0 Insurances

8.1 Insurance (Policy Level)

DASH Field Name	Sync	Fin365 Field Name	Notes
Policy Number	✓	Policy number	-
Insurance Company	✓	Friendly Name	-
Type ↓ (Whole Life, Endowment, Term)	✗		-
Policy Owners	✓	Primary Client	-
Total Annual Premium $	✓	Total Premium $	Calculation of all Premium under the policy. This filed does not map to Total Annual Premium from Information Tab.
Life Insured ↓ (Contact)	✗	-	-
Part of Super ↓ (Yes, No)	✗	-	-

8.2 Life Cover

DASH Field Name	Sync	Fin365 Field Name	Notes
Type ↓ ()	✗	-	-
Premium $	✓	Insurance Premium $	-
Premium Frequency ↓ ()	✓	Premium frequency	-
Sum Insured $	✓	Benefit $	-
Cover Description	✗	-	-
Commencement Date	✓	Commencement Date	-
Renewal Date	✓	Expiry Date	-
Premium Details ↓ ()	✗	-	-
Loading %	✗	-	-
Exclusions	✗	-	-

8.3 TPD Cover

DASH Field Name	Sync	Fin365 Field Name	Notes
Type ↓ ()	✗	-	-
Premium $	✓	Insurance Premium $	-

Premium Frequency ↓ ()	✓	Premium frequency	-
Sum Insured* $	✓	Benefit $	-
Cover Description	✗	-	-
Commencement Date	✓	Commencement Date	-
Renewal Date	✓	Expiry Date	-
Waiting Period	✗	-	-
Premium Details ↓ ()	✗	-	-
Loading %	✗	-	-
Exclusions	✗	-	-

8.4 Trauma Cover

DASH Field Name	Sync	Fin365 Field Name	Notes
Type ↓ (Basic, Comprehensive)	✗	-	-
Premium $	✓	Insurance Premium $	-
Premium Frequency ↓ ()	✓	Premium frequency	-
Sum Insured $	✓	Benefit $	-
Cover Description	✗	-	-
Commencement Date	✓	Commencement Date	-
Renewal Date	✓	Expiry Date	-
Premium Details ↓ ()	✗	-	-
Loading %	✗	-	-
Exclusions	✗	-	-

8.5 Business Expense

DASH Field Name	Sync	Fin365 Field Name	Notes
Type ↓ (Basic, Comprehensive)	✗	-	-
Premium $	✓	Insurance Premium $	-
Premium Frequency ↓ ()	✓	Premium frequency	-
Sum Insured $	✓	Benefit $	-
Sum Insured Frequency ↓ ()	✗	-	-
Cover Description	✗	-	-
Commencement Date	✓	Commencement Date	-

Renewal Date	✓	Expiry Date	-
Waiting Period	✗	-	-
Benefit Period	✗	-	-
Premium Details ↓ ()	✗	-	-
Loading %	✗	-	-
Exclusions	✗	-	-

9.0 Insurance Need Analysis

This section does not sync as there are no equivalent fields in Fin365.

10.0 Social Security

This section does not sync as there are no equivalent fields in Fin365.

11.0 Estate Planning

Sync to Estate Planning Document in Household.

11.1 Will Details

DASH Field Name	Sync	Fin365 Field Name	Notes
Will exists?	✗	-	-
Last review date	✓	Document Date	-
Location of will	✓	Document Location	-
Executor Name	✓	Executor name(s)	-
Testamentary trust provision exists?	✓	Testamentary Trust Included?	-
Who has Potential Claim on Estate?	✗	-	-

11.2 Power of Attorney

DASH Field Name	Sync	Fin365 Field Name	Notes
Type ↓ ()	✓	Power of attorney type ↓ ()	-
Category	✗	-	-
Attorney First Name	✓	Attorney name(s)	-
Attorney Last Name	✓	Attorney name(s)	-

Sync Fin365 to DASH

The following tables show the detailed mapping of the Fin365 fields that sync to DASH fields.

1.0 Summary

Fin365 Field Name	Sync	DASH Field Name	Notes
Salutation ↓	✓	Title ↓	-
First Name	✓	First Name	-
Middle Name	✓	Middle Name	-
Preferred Name	✓	Preferred Name	-
Last Name	✓	Last Name	-
Gender ↓	✓	Gender ↓	-
Date of Birth	✓	Date of Birth	-
Mobile Phone	✗	-	No Fin365 API available
Primary Email	✗	-	No Fin365 API available
Address	✓	Address	-
Marital Status ↓	✓	Marital Status ↓	-
General Health	✓	Health State	-
Private Health Insurance?	✓	Private Health Cover	-
Smoker?	✓	Smoker	-

1.1 Family Members

Fin365 Field Name	Sync	DASH Field Name	Notes
Name	✓	Name	-
Date of Birth	✓	Date of Birth	-
Relationship	✓	Relationship	-

2.0 Employment

Fin365 Field Name	Sync	DASH Field Name	Notes
Employer	✓	Employer	-
Job Title	✓	Job Title	-
Employment Status	✓	Employment Status	-

3.0 Client Goals

Fin365 Field Name	Sync	DASH Field Name	Notes
Name	❌	-	No equivalent field in DASH
Goal Category	❌	-	No equivalent field in DASH
Finance Frequency	❌	-	No equivalent field in DASH
Amount?	✅	Amount	-
Financial Area	❌	-	No equivalent field in DASH
Track Goal?	❌	-	No equivalent field in DASH
On Track?	❌	-	No Fin365 API available
Household	❌	-	No Fin365 API available
Portal Goal ↓	✅	Type ↓	-
Start Date	✅	Start Date	-
End Date	✅	End Date	-
Goal Description	✅	Description	-

3.0 Related – Financial Details

3.1 Income

Fin365 Field Name	Sync	DASH Field Name	Notes
Income Type ↓ ()	✅	Type ↓ ()	-
Income Name	✅	Description	-
Primary Client ↓ (Contact)	✅	Owner ↓ (Contact)	-
Income Frequency ↓ ()	✅	Frequency ↓ ()	-
Gross Income $	✅	Amount $	-
Start Date	✅	Start Date	-
End Date	✅	End Date	-

3.2 Expense

Fin365 Field Name	Sync	DASH Field Name	Notes
Expense Type ↓ ()	✅	Type ↓ ()	-
Expense Name	✅	Description	-
Household ↓	⚠️	Owner ↓ (Contact)	Will sync as Joint to DASH as Expenses are treated as Household in Fin365

Expense Frequency ↓ ()	✓	Frequency ↓ ()	-
Amount $	✓	Amount $	-
Start Date	✓	Start Date	-
End Date	✓	End Date	-

3.3 Liabilities

Fin365 Field Name	Sync	DASH Field Name	Notes
Debt Category ↓ ()	✓	Liability Type ↓ ()	-
Account Number	✓	Account Number	-
Friendly Name	✓	Name	-
Primary Contact ↓ ()	✓	Owners ↓ ()	-
Current Balance $	✓	Outstanding Balance $	-
Issue Date	✓	Date Commenced	-
Interest Rate %	✓	Interest Rate (p.a.)	-
Repayment $	✓	Repayment Amount $	-
Repayment Frequency ↓ ()	✓	Repayment Frequency ↓ ()	-
Repayment Type ↓ ()	✓	Repayment Type ↓ ()	-
Remaining Term (Years)	✓	Fixed Rete Term Remaining and Interest Only Term Remaining	-
Interest Rate Type ↓ ()	✓	Rate Type ↓ ()	-

3.4 Assets – General

Fin365 Field Name	Sync	DASH Field Name	Notes
Asset Purpose ↓ ()	✓	Type ↓ ()	Asset Purpose of Lifestyle will sync to General Assets in DASH
Friendly Name	✓	Name	-
Current Balance $	✓	Market Value $	-
Primary Client ↓ (Contact)	✓	Owner ↓ (Contact)	-

3.5 Investment, Super and Pension – Investment Assets

Fin365 - Asset Type (Purpose)	Sync	DASH - Asset (Type)	Notes
Investment Fund (Investment)	✓	Investment (Platform)	Account Number, Friendly Name, Current Balance Portfolio Holdings sync to DASH
Direct Shares (Investment)	✓	Investment (Shares)	Account Number, Friendly Name, and Current Balance sync to DASH
Insurance Bond (Investment)	✓	Investment (Bond)	Account Number, Friendly Name, and Current Balance sync to DASH
Cash Account (Investment)	✓	Investment (Cash)	Account Number, Friendly Name, and Current Balance sync to DASH
Other (Investment)	✓	Investment (Other)	Account Number, Friendly Name, and Current Balance sync to DASH
Property (Investment)	✓	Investment (Property)	Account Number, Friendly Name, and Current Balance sync to DASH
Term Deposit (Investment)	✓	Investment (Term Deposit)	Account Number, Friendly Name, and Current Balance sync to DASH
Fixed Interest (Investment)	✓	Investment (Managed Fund)	Account Number, Friendly Name, and Current Balance sync to DASH
Kiwi Saver (Investment)	✓	Investment (Cash)	Will sync back to Fin365 as Cash Account
Alternatives (Investment)	✓	Investment (Other)	Will sync back to Fin365 as Others
Legacy (Investment)	✓	Investment (Other)	Will sync back to Fin365 as Others
Unknown (Investment)	✓	Investment (Other)	Will sync back to Fin365 as Others
Superannuation Account (Investment)	✓	Super (Platform)	Account Number, Friendly Name, Current Balance Portfolio Holdings sync to DASH
Defined Benefit (Investment)	✓	Super (Other)	Account Number, Friendly Name, and Current Balance sync to DASH
Retirement Income Stream (Investment)	✓	Pension (Platform)	Account Number, Friendly Name, Current Balance Portfolio Holdings sync to DASH
401K, Business, Cryptocurrency, Endowment, Roth IRA, Traditional IRA, Whole Life	✗	-	No equivalent field in DASH

4.0 Insurance

4.1 Existing – By Policy Owner

Fin365 Field Name	Sync	DASH Field Name	Notes
Policy Number	✓	Policy number	-
Friendly Name	✓	Insurance Company	-
Type ↓ ()	✓	Type ↓ ()	-

4.2 Life Cover

Fin365 Field Name	Sync	DASH Field Name	Notes
Benefit Type ↓ ()	✓	Life Cover Tab	Sync to Life Cover Tab
Insurance Premium $	✓	Insurance Premium $	-
Premium Frequency ↓ ()	✓	Premium frequency	-
Sum Insured $	✓	Benefit $	-
Commencement Date	✓	Commencement Date	-
Expiry Date	✓	Renewal Date	-

4.3 TPD Cover

Fin365 Field Name	Sync	DASH Field Name	Notes
Benefit Type ↓ ()	✓	TPD Cover Tab	Sync to TPD Cover Tab
Insurance Premium $	✓	Insurance Premium $	-
Premium Frequency ↓ ()	✓	Premium frequency	-
Sum Insured $	✓	Benefit $	-
Commencement Date	✓	Commencement Date	-
Expiry Date	✓	Renewal Date	-

4.4 Income Protection

Fin365 Field Name	Sync	DASH Field Name	Notes
Benefit Type ↓ ()	✓	Income Protection Tab	Sync to Income Protection Tab
Insurance Premium $	✓	Insurance Premium $	-
Premium Frequency ↓ ()	✓	Premium frequency	-
Sum Insured $	✓	Benefit $	-
Commencement Date	✓	Commencement Date	-
Expiry Date	✓	Renewal Date	-

4.5 Trauma Cover

Fin365 Field Name	Sync	DASH Field Name	Notes
Benefit Type ↓ ()	✓	Trauma Cover Tab	Sync to Trauma Cover Tab
Insurance Premium $	✓	Insurance Premium $	-
Premium Frequency ↓ ()	✓	Premium frequency	-
Sum Insured $	✓	Benefit $	-
Commencement Date	✓	Commencement Date	-
Expiry Date	✓	Renewal Date	-

4.6 Business Expense

Fin365 Field Name	Sync	DASH Field Name	Notes
Benefit Type ↓ ()	✓	Business Expense Tab	Sync to Business Expense Tab
Insurance Premium $	✓	Insurance Premium $	-
Premium Frequency ↓ ()	✓	Premium frequency	-
Sum Insured $	✓	Benefit $	-
Commencement Date	✓	Commencement Date	-
Expiry Date	✓	Renewal Date	-

5.0 Estate Planning Document

5.1 Document Type – Will

Fin365 Field Name	Sync	DASH Field Name	Notes
Document Type ↓ ()	✓	Will Details	-
Client ↓ ()	✓	Client or Partner	-
Executor name(s)	✓	Executor Name	-
Document Date	✓	Last review date	-
Document Location	✓	Location of will	-
Testamentary Trust Included? ↓ ()	✓	Testamentary trust provision exists? ↓ ()	-

5.2 Document Type – Power of Attorney

Fin365 Field Name	Sync	DASH Field Name	Notes
Document Type ↓ ()	✓	Power Of Attorney	-
Power of attorney type ↓ ()	✓	Category ↓ ()	-
Client	✓	Client or Partner	-
Attorney name(s)	✓	Attorney First Name and Last Name	-