DASH

AstuteWheel And Xplan Data Mapping

Contents

Introduction

This user guide will show the detailed mapping of the fields between AstuteWheel and Xplan. You will need to use both AstuteWheel and Xplan connector apps in DASH to sync from AstuteWheel to Xplan or vice versa.

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.

<u>Underline</u> - Fields that don't sync.

✅ - Sync

❌ - Doesn't sync

⚠️ - Sync with limitations

Sync AstuteWheel to Xplan

The following tables show the detailed mapping of the fields from AstuteWheel to DASH to Xplan.

1.0 Summary

1.1 Goals

AW Field Name	Sync	Xplan Field Name	Notes
Goal is for ↓ ()	✅	Owners ↓ ()	-
Advice Segment	❌	-	No equivalent field in DASH
Client Stated Goal	❌	-	No equivalent field in DASH
Importance	❌	-	-
Time Scale ↓ (Short, Medium, Long)	✅	Time Frame (Years)	Short = 0 Medium = 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	Xplan Field Name	Notes
Title ↓ ()	✅	Title↓ ()	-
Surname*	✅	Surname	-
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 ↓ ()	1. Single = Single 2. Married = Married 3. Defacto = De Facto 4. Registered civil partnership = De Facto 5. Divorced = Divorced 6. Widowed = Widowed

2.2 Health & Lifestyle

AW Field Name	Sync	Xplan Field Name	Notes
Health status ↓ (Excellent, Good, Average, Poor)	✅	Health State ↓ ()	1. Excellent = Excellent 2. Good = Good 3. Average = Good 4. Poor = Poor
Smoker ↓ (Non-smoker, Smoker, Ceased within 12 mths)	✅	Smoker ↓ (Yes or No)	1. Non-smoker = No 2. Smoker = Yes 3. Ceased within 12 mths = No
Private health insurance ↓ ()	❌	-	-

2.3 Contact details

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

3.0 Family & Entities

3.1 Children

Important Note: The "Responsible of" field won't sync from AW to DASH. However, as Xplan's API require "Responsible of" field to sync, it must be entered before syncing to Xplan.

AW Field Name	Sync	Xplan 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	Xplan Field Name	Notes
Type* ↓ ()	✅	Type ↓ ()	1. Family home = Primary Residence (Real Estate) 2. Contents = Household Contents (Life Style) 3. Motor vehicle = Motor Vehicle (Life Style) 4. Boat/Caravan = Other Life Style (Life Style)

			5. Holiday home = Household Contents (Life Style)
			6. Other = Jewellery (Life Style)
Description	✅	Description	-
Owner* ↓ (Contact)	✅	Owners ↓ (Contact)	-
Value* $	✅	Current Value $	-
Date of Purchase	✅	Acquisition Date	-
Purchase Price $	✅	Initial Value $	-

4.2 Investment Assets

Investment Assets do not sync as there is no Xplan API.

4.3 Liabilities

AW Field Name	Sync	Xplan Field Name	Notes
Type* ↓ ()	✅	Type and Sub-type ↓ ()	1. Home Mortgage = Primary Residence Mortgage (Long Term)
			2. Investment loan = Investment Property Mortgage (Long Term)
			3. Personal loan = Personal Loans (Long Term)
			4. Credit cards = Credit Card Balances (Current)
			5. Lease = Doesn't sync to DASH thus doesn't sync to Xplan
			6. Line of credit = Other Loans (Long Term)
			7. Margin loan = Margin Loan (Long Term)
			8. Other = Other Loans (Current)
Lender	❌	-	-
Borrower* ↓ (Contact)	✅	Owners ↓ (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)	❌	-	-
Repayments Amount $	✅	Repayment Amount $	Calculated by using "Interest Rate" and "Repayment Frequency".
Linked Assets ↓ (Assets)	❌	-	-

5.0 Super

5.1 Superannuation Accounts

AW Field Name	Sync	Xplan Field Name	Notes
Fund name*	✅	Description	-
Member* ↓ (Contact)	✅	Owners ↓ (Contact)	-
Member Number	✅	Reference Number	-
Fund type* ↓ ()	✅	Super Type ↓ () Pension Type ↓ ()	**Superannuation** 1. Accumulation = Accumulation 2. Defined benefit = Defined Benefit **Income stream** 1. Transition to retirement = Account Based TTR 2. Account Based = Account Based Pension 3. Account Based (Grandfathered) = Account Based Pension 4. Term based = Term Allocated Pension 5. Defined Benefit = Account Based Pension 6. Comply (50% asset test exempt) = Account Based Pension 7. Comply (100% asset test exempt) = Account Based Pension
Account Balance* $	✅	Pension Balance $	Sync only with **Pension**

Annual Pension $	✅	Payment $	Sync only with **Pension** and **Annual Pension** is converted to **monthly** payment.
Tax Free $	✅	Total Balance $	Only appear in **Super**
Taxable $	❌	-	No equivalent field in DASH
Death nomination ↓ ()	❌	-	No equivalent field in DASH

5.2 Contribution History

Investment Assets do not sync as there is no Xplan API.

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.

7.0 Insurance

7.1 Policy Information

AW Field Name	Sync	Xplan Field Name	Notes
Policy Number	❌	-	-
Linked policy	❌	-	No equivalent field in DASH
Insurance company*	✅	Insurance Company	-
Description	❌	-	No equivalent field in DASH
Commencement 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	Xplan Field Name	Notes
Cover type*↓ ()	✅	Cover Type ↓ ()	1. Death = Life 2. Permanent disablement = TPD 3. Income protection = IP 4. Trauma + Child Trauma = Trauma (Xplan combine them together) 5. Business expense = BE
Sum insured* $	✅	Benefit Amount $	Income protection and Business expense will be per month.
Definition () ↓ ()	❌	-	-
Benefit items	❌	-	-
Policy loading %	❌	-	-
Policy exclusions	❌	-	-
Premium amount $	❌	-	-
Policy fee $	❌	-	-
Stamp duty $	❌	-	-
Premium frequency* ↓ ()	❌	-	-
Premium type ↓ ()	❌	-	-
Commission %	❌	-	-

8.0 Estate

8.1 Will

AW Field Name	Sync	Xplan Field Name	Notes
Has a will? ↓ (Yes, No)	✅	Will exists? ↓ (Yes or No)	-
Date prepared	✅	Date of Will	-
Will Location	✅	Location	-
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

AW Field Name	Sync	Xplan Field Name	Notes
Executor(s)	❌	-	No equivalent field in DASH

8.2 Attorneys

AW Field Name	Sync	Xplan Field Name	Notes
Appointed a Power of Attorney (Financial)?	✅	Type ↓ (Enduring, Medical, Normal)	Type is "Normal" in Xplan
Enduring attorney?	❌	-	No equivalent field in DASH
Attorney(s) appointed	✅	Surname and First name	-
Appointed a Guardian/Power of Attorney (Medical)?	✅	Type ↓ (Enduring, Medical, Normal)	Type is "Normal" in Xplan
Attorney(s) appointed	✅	Surname and First name	-

Sync Xplan to AstuteWheel

The following tables show the detailed mapping of the fields from Xplan to DASH to AstuteWheel.

1.0 Key Details

1.1 Key Details

Xplan Field Name	Sync	AW Field Name	Notes
Title ↓ ()	✖	-	No Xplan API available
First Name*	✔	First Name	This field is **required** to sync to AW.
Second Name	✔	Middle Name	-
Preferred Name	✔	Preferred Name	-
Surname*	✔	Surname	This field is **required** to sync to AW.
Last Previous Name	✖	-	No equivalent field in DASH
Gender* ↓ (Male, Female)	✔	Gender* ↓ (Male, Female, Unspecified)	This field is **required** to sync to AW.
Date of Birth*	✔	Date of Birth	This field is **required** to sync to AW.
Marital Status* ↓ ()	✔	Relationship Status ↓ ()	This field is **required** to sync to AW. 1. Single = Single 2. Married = Married 3. Separated = Separated 4. Divorced = Divorced 5. De Facto = De Facto
Nationality ↓ ()	✖	-	No equivalent field in DASH
Country of Birth ↓ ()	✖	-	No equivalent field in DASH
Tax Resident Status ↓ ()	✖	-	No equivalent field in AW
Smoker ↓ (Yes, No)	✔	Smoker ↓ (Yes or No)	-
Health ↓ ()	✖	-	No Xplan API available

1.2 Contact Details

Xplan Field Name	Sync	AW Field Name	Notes
Email* (Preferred)	✓	Email Address	Synced as "Others" to DASH and only "Preferred" Email in Xplan will sync to AW.
Home Phone	✓	Home phone	-
Mobile Phone*	✓	Mobile	-
Work Phone	✓	Work phone	-
Home Address	✓	Residential Address	All Addresses are synced as "Home" to DASH so the default Home address will sync to AW.

1.3 Dependents

Xplan Field Name	Sync	AW Field Name	Notes
Title	✗	-	No equivalent field in DASH
Surname*	✓	Name	This field is **required** to sync to AW.
First Name*	✓	Name	This field is **required** to sync to AW.
Language	✗	-	No equivalent field in DASH
Relation ↓ ()	✓	Relationship	No equivalent field in AW
Related to ↓ ()	✓	Responsible of ↓ (Contact)	No equivalent field in AW
Date of Birth*	✓	Date of Birth	This field is **required** to sync to AW.
Gender ↓ (Male, Female)	✗	-	"Male" by default in AW
Financial Dependant* ↓ ()	✓	Living at home ↓ ()	This field is **required** to sync to AW.
Dependant Until Age	✗	Dependant till Age	No equivalent field in AW
Comments	✗	-	No equivalent field in DASH

2.0 Objectives

2.1 Financial

Xplan Field Name	Sync	AW Field Name	Notes
Type ↓ (Financial, Lifestyle)	❌	Advice Segment ↓ ()	"Income Plan" by default in AW.
Standard Options ↓ ()	❌	-	No Xplan API available
Timeframe ↓ ()	❌	-	No Xplan API available
Description	✅	Client Stated Goal & Agreed Goal	Only "Agreed Goal" will sync back to DASH.
Time Frame (Years)	✅	Time Scale ↓ (Short, Medium, Long)	Short = 0 Medium = 1 or 2 Long >= 3
Time Frame (Months)	❌	-	No equivalent field in DASH
Target Amount	✅	Amount $	-
Priority ↓ ()	❌	Importance ↓ ()	"Low" by default in AW
Owner ↓ (Contact)	✅	Goal is for ↓ (Contact)	If the contact has a partner, the goals will sync as "Client and Partner".
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)	✅	Active	Cancelled goals will not sync to AW.

3.0 Financial Information

3.1 Income

Xplan Field Name	Sync	AW Field Name	Notes
Sub-Type ↓ ()	✅	Income	1. Annuity Income = Other Income 2. Bonuses = Bonus & commissions 3. Business Income = Other Income 4. Commissions = Other Income 5. Fringe Benefits/ Salary Sacrifice = Other income 6. <u>Investment: Dividends</u> = Does not sync (entire item) 7. <u>Investment: Interest</u> = Does not sync (entire item) 8. <u>Investment: Other Income</u> = Does not sync (entire item) 9. <u>Investment: Rental</u> = Does not sync (entire item) 10. <u>Lifestyle Income</u> = Does not sync (entire item) 11. Ordinary Wages = Gross Salary 12. Other Income = Other Income 13. Pension Income = Other Income 14. Royalties = Other Income 15. Trade Income = Other Income
Description*	⚠️	Employer	To Sync "Gross Salary" and "Bonus", this "Description" must match with the "Employer" Field in Employment Details.
Owners* ↓ (Contact)	✅	Individual ↓ (Contact)	This field is **required** to sync to AW.
Fixed/Variable	❌	-	No equivalent field in DASH
Frequency ↓ ()	❌	-	No equivalent field in AW
Amount* $	✅	Amount $	AW converts to annual amount.
Annual Increase	❌	-	No equivalent field in DASH
Start Date	❌	-	No equivalent field in AW
End Date	❌	-	No equivalent field in AW

Future Amount	❌	-	No equivalent field in DASH

3.2 Expense

Xplan Field Name	Sync	AW Field Name	Notes
Type ↓ () / Sub-Type ↓ ()	✅	Expenses	1. Housing / Other Savings = Lifestyle expenses 2. Contributions / Post Tax Contributions = Super Contributions (Must enter "Deductible" yes or no in DASH to sync to AW. For more details, please visit AW User Guide Part-2, Page 7.) 3. Debt-Long Term / Mortgage Payments = Does not sync 4. Taxes / Income Tax = Income Tax 5. Insurance / Life = Does not sync 6. Debt-Short Term / Credit Cards = Does not sync 7. Other Expenditure / Other Expenditure = Other Expenditure (Must enter "Deductible" yes or no in DASH to sync to AW. For more details, please visit AW User Guide Part-2, Page 7.)
Description	❌	-	No equivalent field in AW
Owner ↓ (Contact)	✅	Next to each expense field	-
Fixed/ Variable ↓ ()	❌	-	No equivalent field in DASH
Frequency ↓ ()	❌	Frequency ↓ ()	No equivalent field in AW
Amount $	✅	Value $	AW converts to annual 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	AW Field Name	Notes
Type ↓ () / Asset Type ↓ ()	✅	Type ↓ ()	1. Real Estate / Primary Residence = Family home 2. Life Style / Household Contents = Contents 3. Life Style / Motor Vehicle = Motor vehicle 4. Life Style / Antiques = Does not sync (type only) 5. Life Style / Artwork = Does not sync (type only) 6. Life Style / Other Life Style = Other
Policy Number	❌	-	No Xplan API available
Current Value* $	✅	Value $	This field is **required** to sync to AW.
Recommended Value	❌	-	No Xplan API available
Description	✅	Description	-
Owners* ↓ (Contact)	✅	Owners ↓ (Contact)	This field is **required** to sync to AW.
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	AW Field Name	Notes
Type ↓ () / Asset Type* ↓ ()	✅	Type ↓ ()	1. Real Estate/ Investment Property = Property 2. Investments/ Bonds = Bonds/ Fixed Interest 3. Investments/ Other Investments = Other 4. Investments/ Stocks = Shares/ Stocks 5. Investments/ Unit Trusts = Managed Fund/ Unit trust 6. Investments/ Platforms = Have to choose type in DASH to sync to AW

			7. Liquid Assets/ Cash on Hand = Cash
			8. Liquid Assets/ Current Savings = Cash
			9. Liquid Assets/ Fixed Deposits = Term deposits
Policy Number	❌	-	No Xplan API available
Current Value* $	✅	Value $	-
Recommended Value	❌	-	No Xplan API available
Description	✅	Description	-
Owners* ↓ (Contact)	✅	Owners ↓ (Contact)	-
Initial Value $	✅	Purchase Price $	-
Capital Withdrawal Amount $	❌	-	No Xplan API available
Establishment Date	❌	-	No Xplan API available

3.5 Liabilities

Xplan Field Name	Sync	AW Field Name	Notes
Type ↓ () and Sub-Type* ↓ ()	✅	Type ↓ ()	**Current** 1. Credit Card Balances = Credit cards 2. Outstanding Payment = Credit cards 3. Other Loans = Other 4. <u>Overdraft</u> = Have to choose type in DASH to sync to AW **Long Term** 1. Primary Residence Mortgage = Home mortgage 2. Investment Property Mortgage = Investment loan 3. Car Loan = Other 4. Education Loans = Other 5. Personal Loans = Personal loan 6. Other Loans = Line of credit 7. Margin Loan = Margin Loan **Contingent** 1. Limited = Other 2. Joint and Several = Other
Package/ Product Name	❌	-	No equivalent field in AW

Policy Number	❌	-	No equivalent field in AW
Outstanding Balance	✅	Balance $	-
Account/ Client Number	❌	-	No Xplan API available
Institution	❌	-	No Xplan API available
Owners ↓ (Contact)	✅	Borrower ↓ (Contact)	-
Interest Rate Type ↓ (Fixed, Variable)	✅	Interest Type ↓ (Variable, Fixed 1 to 10 Year)	Variable = Variable Fixed = Doesn't sync
Interest Rate p.a. %	✅	Interest Rate %	-
Revert Rate p.a	❌	-	No Xplan API available
Interest Only Term (years)	❌	-	No Xplan API available
Start Date	❌	-	No Xplan API available
End Date	❌	-	No Xplan API available
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

Xplan Field Name	Sync	AW Field Name	Notes
Owner* ↓ (Client, Partner)	✅	Member ↓ (Contact)	This field is **required** to sync to AW.
Type* ↓ ()	✅	Fund Type ↓ ()	This field is **required** to sync to AW.
Super Plan Selection ↓ ()	❌	-	No equivalent field in DASH
Super Plan*	✅	Fund name	This field is **required** to sync to AW.
Reference Number	✅	Member Number	-
Eligible Service Date	❌	-	No equivalent field in AW
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 $	❌	-	No equivalent field in AW
Taxable – Untaxed Element $	❌	-	No Xplan API available
Tax Free $	✅	Tax Free $	-
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 (Does not sync)			

3.7 Pension

Xplan Field Name	Sync	AW Field Name	Notes
Owner* ↓ (Client, Partner)	✅	Member ↓ (Contact)	This field is **required** to sync to AW.
Type* ↓ ()	✅	Fund Type ↓ ()	1. Allocated Pension = Account based 2. Term Allocated Pension = Term based 3. <u>Lifetime Pension</u> = Comply (100% asset test exempt) (Have to enter **Pension Balance** to sync to AW) 4. Life Expectancy Pension = Life Expectancy 5. <u>Fixed Term Pension</u> = Does not sync 6. Account Based Pension = Account based 7. Account Based Pension TTR = Transition to retirement
Retirement Plan Selection	❌	-	No equivalent field in DASH
Retirement Plan ↓ ()	❌	-	No equivalent field in DASH
Reference Number	✅	Member Number	-
Date of Balance	❌	-	No Xplan API available
Status ↓ ()	❌	-	No Xplan API available
Under Advice ↓ ()	❌	-	No equivalent field in DASH
Description*	✅	Fund name	This field is **required** to sync to AW.
Date Submitted	❌	-	No Xplan API available
Purchase Date	❌	-	No Xplan API available

Term at Purchase (years)	❌	-	No equivalent field in AW
Reversionary	❌	-	No Xplan API available
Purchase Price	❌	-	No Xplan API available
Tax Free %	❌	-	No Xplan API available
Pension Balance* $	✅	Account Balance $	This field is **required** to sync to AW.
Payment	✅	Pension (Superannuation) $	Under "Cashflow" section and AW converts to **payment** based on "Frequency" field in DASH.
Frequency ↓ ()	❌	-	No equivalent field in AW
Payment Indexation ↓ ()	❌	-	No equivalent field in AW
Payment Variation	❌	-	No equivalent field in DASH
Tax Deductible Percentage %	✅	Tax Free $	"Tax Free Percentage" is converted to **dollar** based on the "Total Balance".
Centrelink Deductible Amount $	❌	-	No equivalent field in AW
Add Super Details (Does not sync)			
Add Beneficiaries (Does not sync)			

3.8 Will & Testament

Xplan Field Name	Sync	AW 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	✅	Date prepared	-
Have Testamentary Trust ↓ (Yes, No, Not disclosed)	❌	-	No Xplan API available
Location	✅	Will Location	-
Notes	❌	-	No equivalent field in DASH

3.9 Power of Attorney & Guardianship

Xplan Field Name	Sync	AW Field Name	Notes
Type ↓ ()	❌	-	No equivalent field in AW
Surname	❌	-	No equivalent field in AW
First name	❌	-	No equivalent field in AW

Notes	❌	-	No equivalent field in DASH

4.0 Insurance

Important Note: When sync from Xplan to DASH, Xplan does not sync "**Policy Owners**" and "**Life Insured**". AW **requires** those two fields to sync insurance. Therefore, "**Policy Owners**" and "**Life Insured**" fields must be entered in DASH before you sync to AW.

4.1 Existing – By Policy Owner

Xplan Field Name	Sync	AW Field Name	Notes
Type ↓ (Whole Life, Endowment, Term)	❌	-	No equivalent field in AW
Policy Number	✅	Policy Number	-
Underwriter ↓ ()	❌	-	No Xplan API available
Plan Name*	✅	Insurance Company	This field is **required** to sync to AW.
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 ↓ ()	❌	Premium Frequency ↓ ()	"Yearly" by default in AW

4.2 Life Cover

Xplan Field Name	Sync	AW Field Name	Notes
Type ↓ ()	❌	-	No Xplan API available
Sum Insured* $	✅	Sum Insured $	This field is **required** to sync to AW.
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	AW Field Name	Notes
Type ↓ ()	❌	-	No Xplan API available
Sum Insured* $	✅	Sum Insured $	This field is **required** to sync to AW.
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	AW 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	AW Field Name	Notes
Type ↓ ()	✗	-	No Xplan API available
Sum Insured* $	✓	Sum Insured $	This field is **required** to sync to AW.
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	AW 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