

DASH

USER GUIDE

ASTUTEWHEEL CONNECTOR – PART 1 (Initial Setup)

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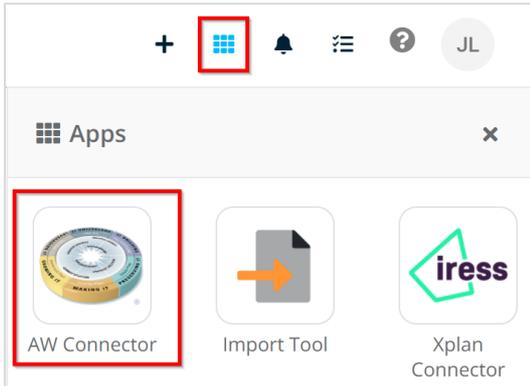
1 AstuteWheel Connector Initial Setup

The AstuteWheel Connector App is used to sync data between DASH and AstuteWheel.

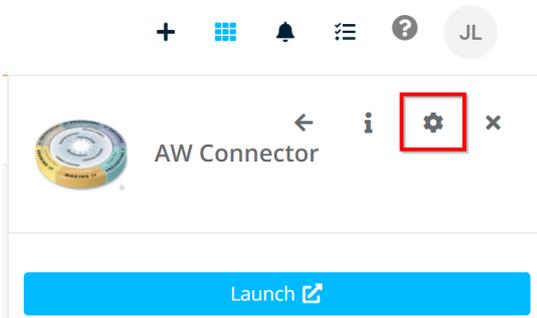
Important: Before using AstuteWheel Connector App, please obtain a subscription direct from AstuteWheel and request for an **API Key** for your DASH account.

Once the API Key is obtained, please follow the following steps to complete the setup:

1. Subscribe to “**AW Connector**” App in DASH App Store.
2. Click on the “**Apps**” icon on navigation bar and select “**AW Connector**” App.



3. Click on the “**App Setting**” with the cog icon.



4. Please enter your username (email address) and the AW API Key and click “**Save**”.

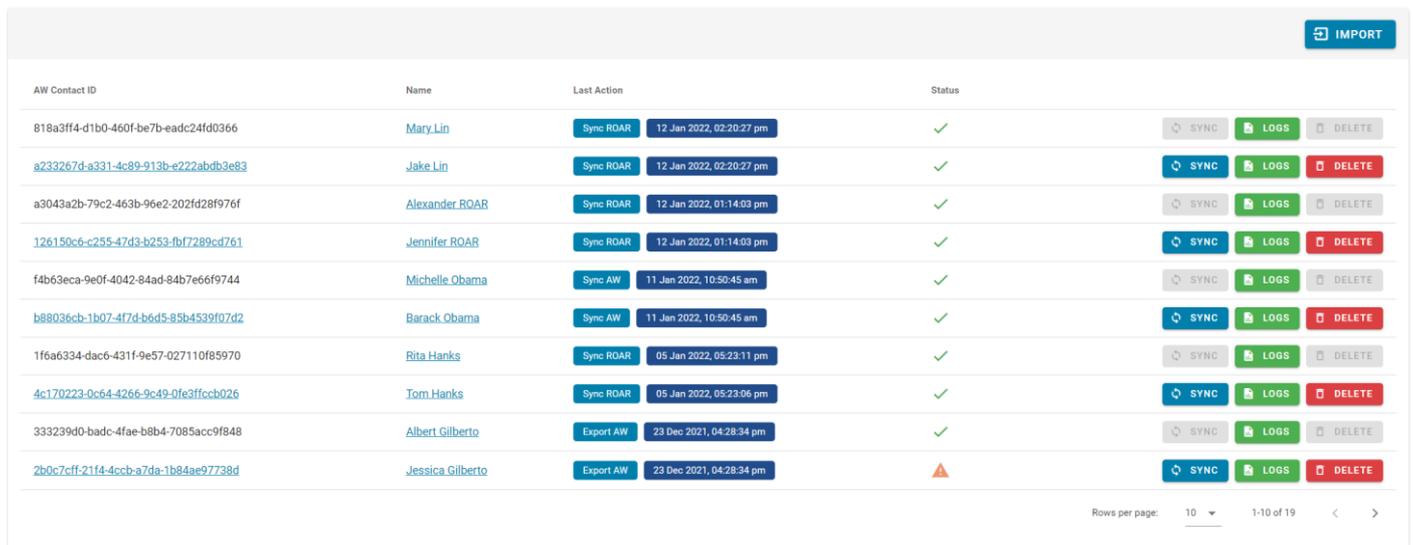
A screenshot of the 'AstuteWheel Settings' form. The form has a title 'AstuteWheel Settings' and two input fields. The first field is labeled 'Username' and contains the text 'abc@email.com'. Below this field is a red error message 'Username is required'. The second field is labeled 'AstuteWheel API Key' and contains the text 'API key to be request provide by Astutewheel its different to user password.'. Below this field is a red error message 'API Key is required'. At the bottom right of the form is a blue button labeled 'SAVE'.

2 Launching AstuteWheel Connector without a Contact

Launching the AW Connector without selecting a Contact (client) will take you to the “**Contact Management Dashboard**” where you will see the list of all Contacts that are mapped between DASH and AstuteWheel. In this view, you can manage your mapping and sync client data without having to be in any particular Contact.

To launch AW Connector without a Contact:

1. Go to “**Home**” page or “**Contacts**” page in DASH.
2. Open “**Apps**” from the navigation bar and launch “**AW Connector**” App.
3. You will see the “**Contact Management Dashboard**” as below.



AW Contact ID	Name	Last Action	Status
818a3ff4-d1b0-460f-be7b-eadc24fd0366	Mary Lin	Sync ROAR 12 Jan 2022, 02:20:27 pm	✓
a233267d-a331-4c89-913b-e222abdb3e83	Jake Lin	Sync ROAR 12 Jan 2022, 02:20:27 pm	✓
a3043a2b-79c2-463b-96e2-202fd28f976f	Alexander ROAR	Sync ROAR 12 Jan 2022, 01:14:03 pm	✓
126150c6-c255-47d3-b253-fb7289cd761	Jennifer ROAR	Sync ROAR 12 Jan 2022, 01:14:03 pm	✓
f4b63eca-9e0f-4042-84ad-84b7e66f9744	Michelle Obama	Sync AW 11 Jan 2022, 10:50:45 am	✓
b88036cb-1b07-4f7d-b6d5-85b4539f07d2	Barack Obama	Sync AW 11 Jan 2022, 10:50:45 am	✓
1f6a6334-dac6-431f-9e57-027110f85970	Rita Hanks	Sync ROAR 05 Jan 2022, 05:23:11 pm	✓
4c170223-0c64-4266-9c49-0fe3ffccb026	Tom Hanks	Sync ROAR 05 Jan 2022, 05:23:06 pm	✓
333239d0-badc-4fae-b8b4-7085acc9f848	Albert Gilberto	Export AW 23 Dec 2021, 04:28:34 pm	✓
2b0c7cff-21f4-4ccb-a7da-1b84ae97738d	Jessica Gilberto	Export AW 23 Dec 2021, 04:28:34 pm	⚠

The “**AW Contact ID**” Column is the contact link to AstuteWheel.

The “**Name**” Column is the Contact link to DASH.

The “**Last Action**” Column shows the previous actions performed on the Contacts and the date and time of the action.

The **definition** for the actions under **Last Action** column are:

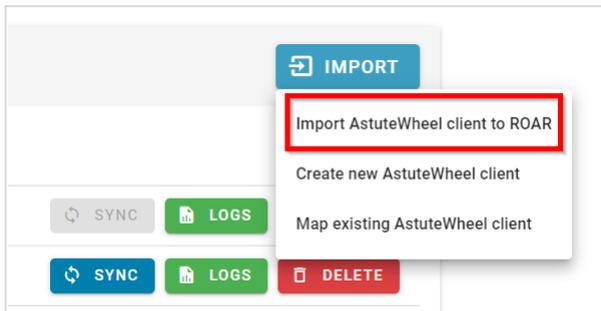
- Sync DASH -> Syncing the Contact’s details to DASH from AW
- Sync AW -> Syncing the Contact’s details to AW from DASH
- Import DASH -> Import AstuteWheel Contact to DASH
- Export AW -> Export DASH Contact to AstuteWheel
- Map -> Create mapping between DASH Contact and AstuteWheel Contact

The “**Status**” Column shows whether the sync was successful or not. If it is successful, it will show a green tick.

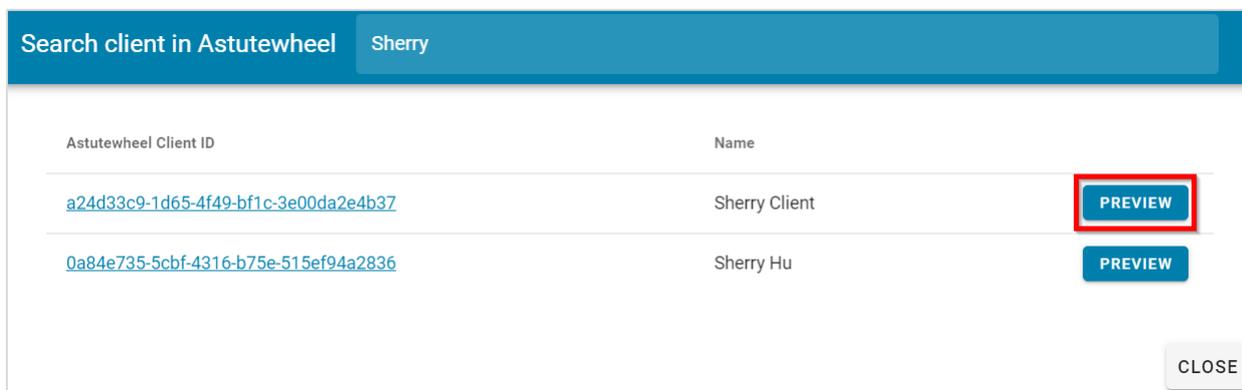
If it is not successful, it will show an error (exclamation mark) icon. You can read the error message by clicking at the “**Logs**” in green colour.

2.1 Import AstuteWheel client to DASH

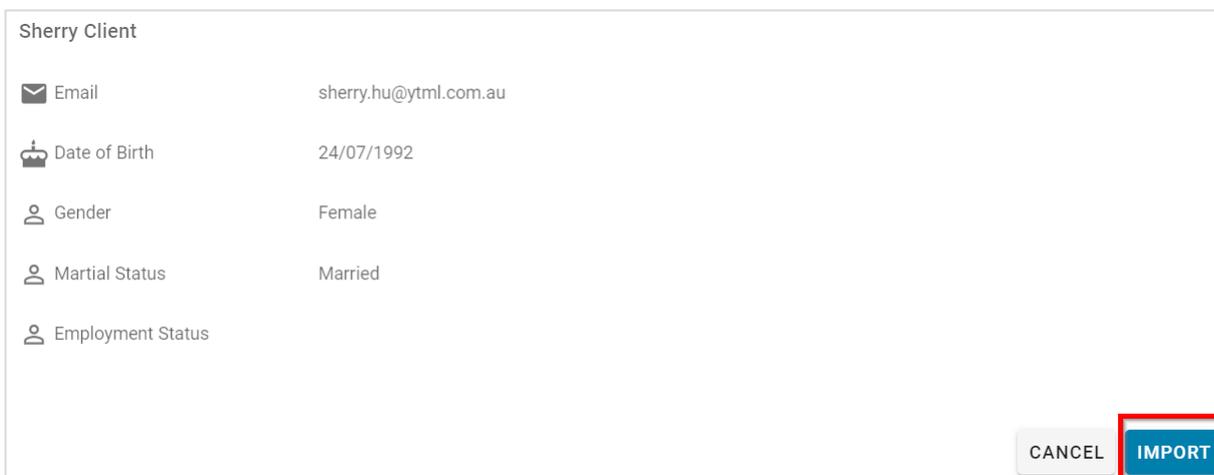
1. In the same “Contact Management Dashboard”, click “Import” and select “Import AstuteWheel client to DASH”. This action will pass client data from AW into DASH.



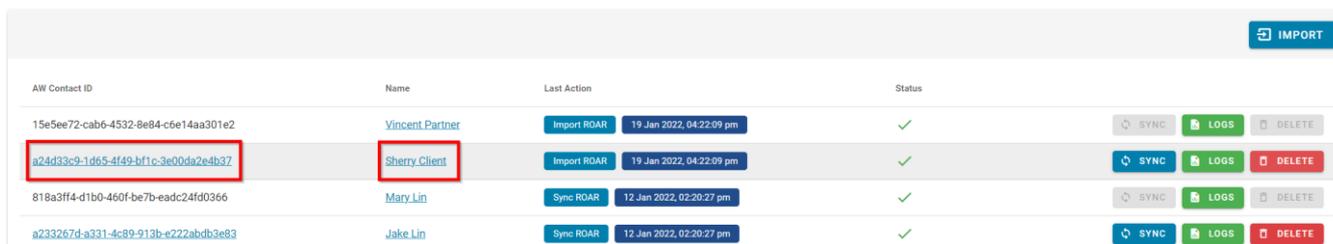
2. Search for your AstuteWheel Client and click “Preview”.



3. Check that it's the right client and click “Import”.

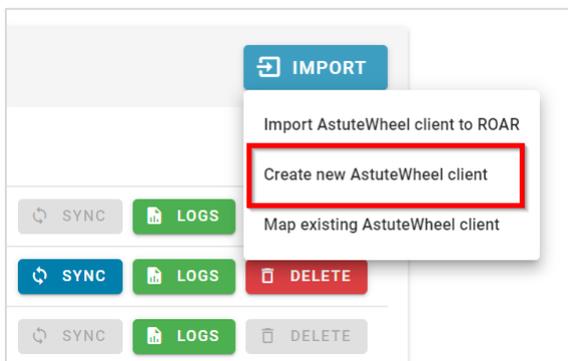


4. Once the import is finished, you can check the client by clicking the “Client Name” to see the client in DASH or the “AW Contact ID” to see the client in AstuteWheel.

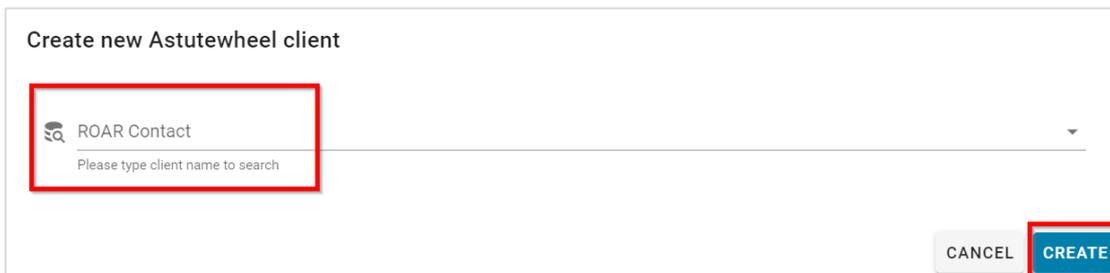


2.2 Create new client in AstuteWheel

1. In the same “**Contact Management Dashboard**”, click “**Import**” in Contact Management Dashboard and click “**Create new AstuteWheel client**”. This action allows you to create a new client in AstuteWheel from a client in DASH.



2. Search DASH Contact and click “**Create**”.



3. Once the export is finished, you can check the client by clicking the “**AW Contact ID**” to see the client in AstuteWheel.

AW Contact ID	Name	Last Action	Status
0607074d-0c89-451c-996e-d3f2a181eb7d	Mary Lin	Export AW 21 Jan 2022, 02:52:15 pm	✓
1bd2de29-a52a-420f-a4bb-83222abf9359	Jake Lin	Export AW 21 Jan 2022, 02:52:15 pm	✓
b19d3e5c-1ab0-46a4-9dd6-50c699122986	Albert Gilberto	Map 20 Jan 2022, 10:34:12 am	✓

2.3 Sync client data between DASH and AstuteWheel

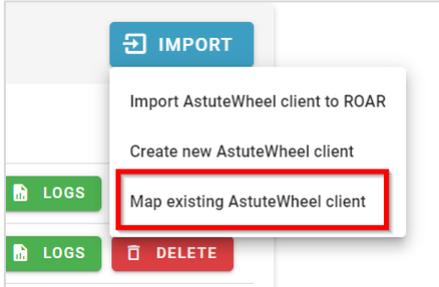
After exporting and importing the client, changes you make in DASH or AstuteWheel can be synced interchangeably. If you want to sync AW changes to DASH, click “**Sync to DASH**” or if you want to sync DASH changes to AstuteWheel click “**Sync to AstuteWheel**”.

AW Contact ID	Name	Last Action	Status
b19d3e5c-1ab0-46a4-9dd6-50c699122986	Albert Gilberto	Map 21 Jan 2022, 03:10:04 pm	✓
b59a32d2-011a-4af2-aa32-bf6728f6769d	Jessica Gilberto	Map 21 Jan 2022, 03:10:03 pm	✓
0607074d-0c89-451c-996e-d3f2a181eb7d	Mary Lin	Export AW 21 Jan 2022, 02:52:15 pm	✓
1bd2de29-a52a-420f-a4bb-83222abf9359	Jake Lin	Export AW 21 Jan 2022, 02:52:15 pm	✓
2a772d8c-d40c-4daf-8759-87b777ce0e16	Jason Bull	Import ROAR 20 Jan 2022, 10:07:19 am	✓
15e5ee72-cab6-4532-8e84-c6e14aa301e2	Vincent Partner	Import ROAR 19 Jan 2022, 04:22:09 pm	✓

2.4 Map between DASH and AstuteWheel clients

When you have a Contact which already exists in both DASH and AW, you should map or link these Contacts to create a connection between these two Contacts, and you will be able to sync data between AW and DASH.

1. To create a mapping, click on the **“Import”** in Contact Management Dashboard and click **“Map Existing AstuteWheel client”**.



2. Find the Contact in both DASH and AstuteWheel and click **“Create”**.



3. After the mapping is done, you will see that the Contacts are mapped, and you can either choose **“Sync to DASH”** or **“Sync to AstuteWheel”**.

AW Contact ID	Name	Last Action	Status	Actions
b19d3e5c-1ab0-46a4-9dd6-50c699122986	Albert Gilberto	Map 21 Jan 2022, 03:10:04 pm	✓	SYNC LOGS DELETE
b59a32d2-011a-4af2-aa32-bf6728f6769d	Jessica Gilberto	Map 21 Jan 2022, 03:10:03 pm	✓	SYNC LOGS DELETE
0607074d-0c89-451c-996e-d3f2a181eb7d	Mary Lin	Export AW 21 Jan 2022, 02:52:15 pm	✓	Sync to ROAR SYNC LOGS DELETE
1bd2de29-a52a-420f-a4bb-83222abf9359	Jake Lin	Export AW 21 Jan 2022, 02:52:15 pm	✓	Sync to AstuteWheel SYNC LOGS DELETE
2a772d8c-d40c-4daf-8759-87b777ce0e16	Jason Bull	Import ROAR 20 Jan 2022, 10:07:19 am	✓	SYNC LOGS DELETE

2.5 Delete the mapping between DASH and AstuteWheel clients

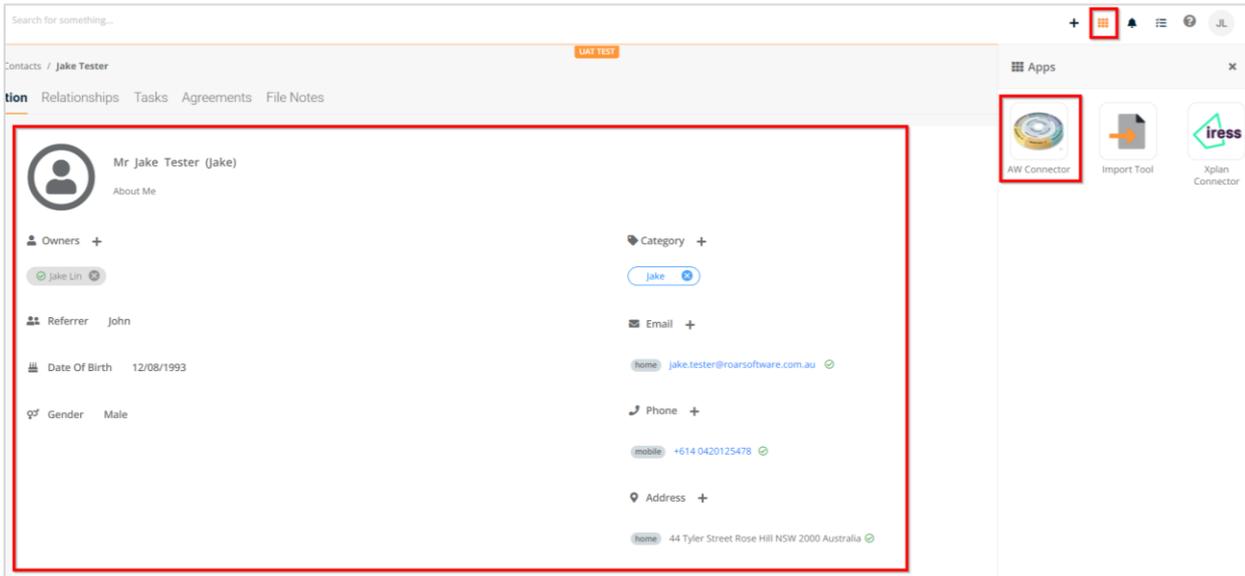
Mappings can be deleted, and they can be deleted by clicking the **“Delete”** button in the Client Management Dashboard.

Note: Deleting the mapping won't delete the Contacts in DASH or AstuteWheel.

AW Contact ID	Name	Last Action	Status	Actions
b19d3e5c-1ab0-46a4-9dd6-50c699122986	Albert Gilberto	Map 21 Jan 2022, 03:10:04 pm	✓	SYNC LOGS DELETE
b59a32d2-011a-4af2-aa32-bf6728f6769d	Jessica Gilberto	Map 21 Jan 2022, 03:10:03 pm	✓	SYNC LOGS DELETE
0607074d-0c89-451c-996e-d3f2a181eb7d	Mary Lin	Export AW 21 Jan 2022, 02:52:15 pm	✓	SYNC LOGS DELETE
1bd2de29-a52a-420f-a4bb-83222abf9359	Jake Lin	Export AW 21 Jan 2022, 02:52:15 pm	✓	SYNC LOGS DELETE
2a772d8c-d40c-4daf-8759-87b777ce0e16	Jason Bull	Import ROAR 20 Jan 2022, 10:07:19 am	✓	SYNC LOGS DELETE
15e5ee72-cab6-4532-8e84-c6e14aa301e2	Vincent Partner	Import ROAR 19 Jan 2022, 04:22:09 pm	✓	SYNC LOGS DELETE

3 Launching AstuteWheel Connector against a Contact

If you launch the AW Connector against a Contact, you will get one of the two dashboards depending on the Contact you choose.



If you launch the AW Connector against a Contact that **hasn't been mapped** with AW before, you will see the dashboard with the options to **“Create new AstuteWheel client”** or **“Map existing AstuteWheel client”**.

AstuteWheel Connector

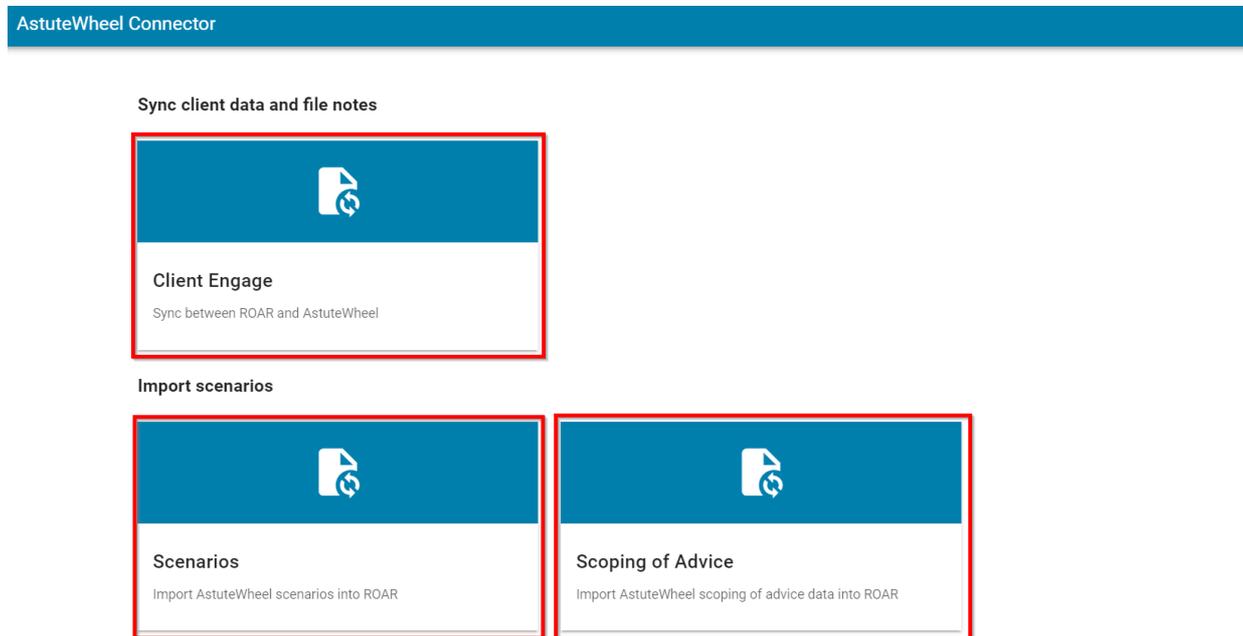
This contact is currently not mapped to Astutewheel, please choose an action below to start:



1. Choose **“Create new AstuteWheel client”** if the client doesn't exist in AstuteWheel. This will create a new Contact in AstuteWheel.
2. Choose **“Map existing AstuteWheel client”** if the client already exists in AstuteWheel. This will create a connection between the Contact in DASH and AstuteWheel.

If you launch the AstuteWheel Connector App against a Contact that is already **mapped** with AW, you will see the following dashboard with the options to:

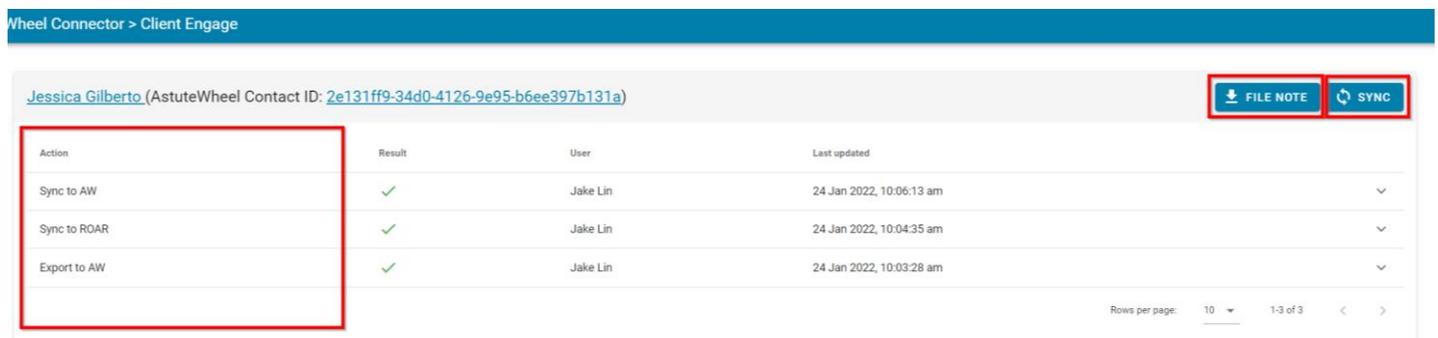
1. Sync Client data and File Notes
2. Import AstuteWheel Scenarios into DASH
3. Import AstuteWheel Scoping of advice data into DASH



3.1 Client Engage – Sync Client data and File Notes

In the Client Engage option, this allows you to sync Client Fact Find data and File Notes in AW's **Client Dashboard**.

Note: Only **generated** File Notes (generated documents) in AW can sync to DASH. The general File Notes created in AW cannot be synced to DASH. File notes sync is one way - from AW to DASH only.



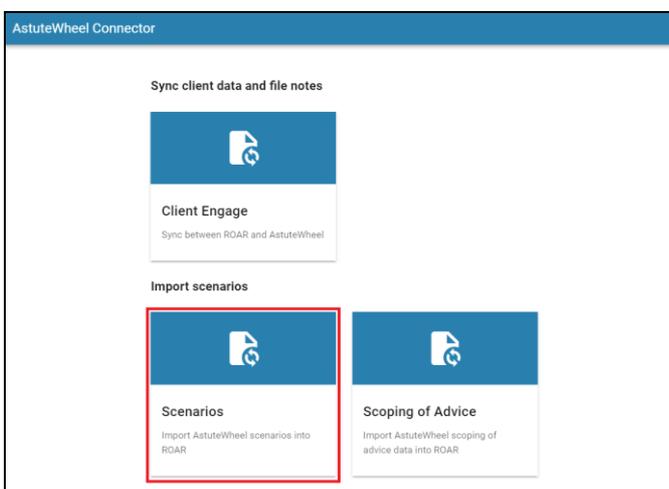
3.2 Scenarios – Import AstuteWheel scenarios into DASH

This option allows you to import calculation Scenarios completed from within the Meeting Dashboard in AstuteWheel. Once Scenarios are imported to DASH, these can be used to populate into your SOAs, such as retirement charts and cashflow projection tables.

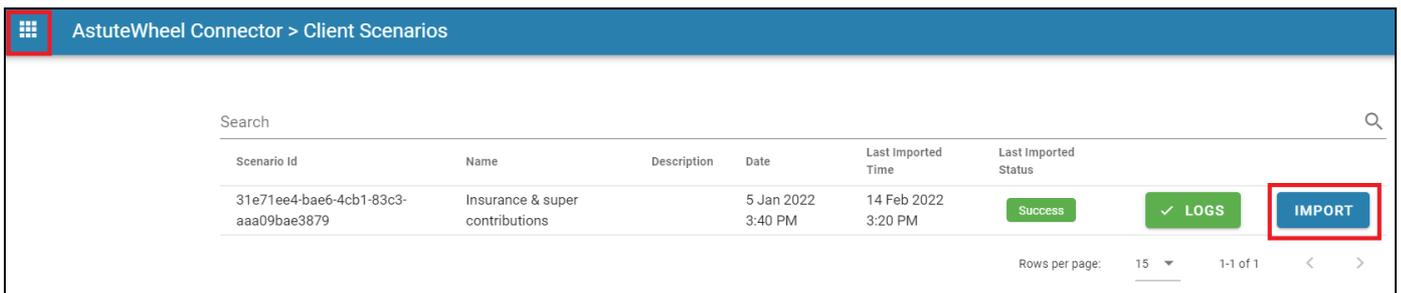
Note: At this time, only **Retirement Scenarios** within the Retirement tab in AW can be imported to DASH. In addition, **only Scenario 1** within the Retirement Scenario can be imported to DASH, as Scenario 1 is assumed to be the recommended Scenario and will be used to populate into SOAs in DASH.

To import Scenarios to DASH:

1. Click on the “**Scenarios**” tile.



2. Then, click on “**Import**”.



3. To navigate back to the main Dashboard for the AW Connector, click on the “**nine-square**” icon at the top left corner.

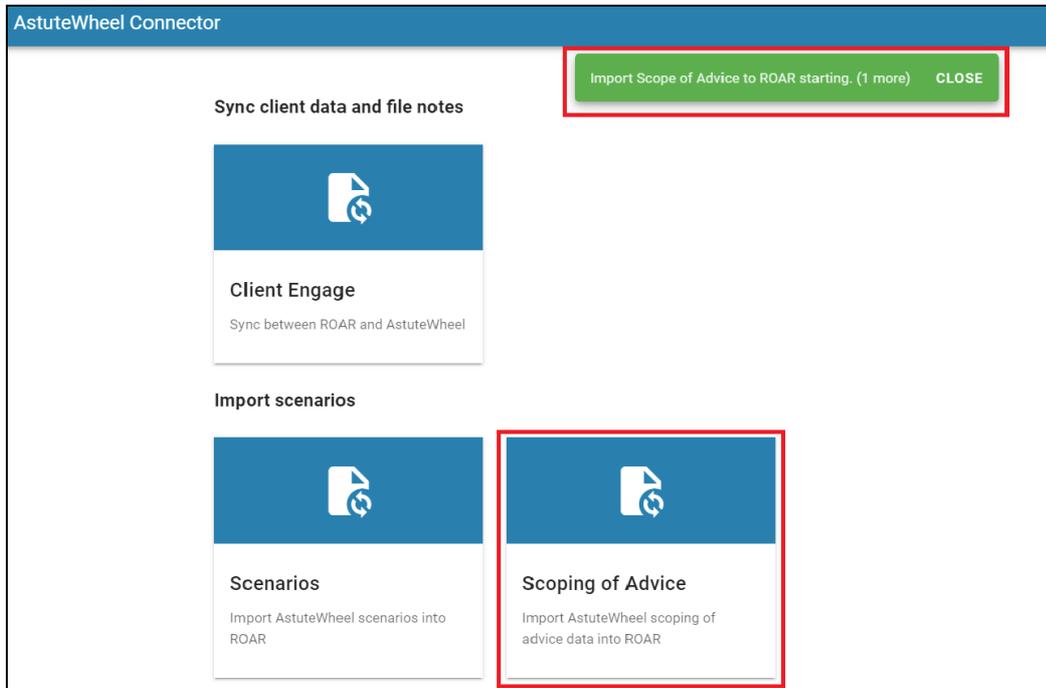
3.3 Scoping of Advice – Import AstuteWheel Scoping of Advice into DASH

This option allows you to import the Scoping of Advice data from AW to DASH. You would import this to DASH if you have completed the **Scope** function from the Client Dashboard within AW.

Once imported, the Scope of Advice data can populate into SOAs.

To import Scoping of Advice to DASH:

1. Click on the Scoping of Advice tile.
2. You will then see a green message to indicate import is starting.



3.4 Check imported scenarios in DASH

Once you have imported either Scenarios or Scoping of Advice to DASH, you can check that these have successfully been imported.

To do this, go back into DASH, and under the History section of the AW Connector, you will see details of the imported scenarios. These are now ready to be selected for SOA generation.

