

## CONNECTOR DATA – CAS 360

The tables below detail the *standard* Connector field mappings for the above software. The Left column is the source system field name. The Right column is the Xeppo field it is mapped to. Custom mapping can be applied as required. Email [support@xeppo.com.au](mailto:support@xeppo.com.au) if you need further guidance.

General Details	
CAS 360	Xeppo
<b>Individual Details</b>	
Client ID	ClientID
Name	Name
Entity Type	Entity Type
TFN	TFN <sup>1</sup>
ABN	ABN
SFN	SFN
<b>Trust Details</b>	
ClientID	ClientID
Name	Name
Entity Type	Entity Type
TFN	TFN <sup>1</sup>
ABN	ABN
SFN	SFN
Trustee Name	Trustee Name
Trust Deed Date	Trust Deed Date
<b>Company Details</b>	
Entity Type	Entity Type
Annual Review Date	Annual Review Date
Details/a: Annual Review Status	Annual Review Status
Details/a: Annual Review Status Date	Annual Review Status Date
Details/a: ASIC Agent Number	ASIC Agent Number
Client ID	Client ID
Date Of Birth	Date Of Birth
Jurisdiction	Jurisdiction
Name	Name
Code	Code
Registration State	Last Name
Registered	First Name
Type/a: Company Class	Company Class
Type/a: Company Sub Class	Company Sub Class

Type/a: Company Type	Company Type
Father Code	Other Entity Type
Son Code	Address ID
Group ID	Group ID
Entity Type	Entity Type
TFN	TFN <sup>1</sup>
ABN	ABN
SFN	SFN
Trustee Name	Trustee Name
Trust Deed Date	Trust Deed Date

Contact Details	
CAS 360	Xeppo
<b>Email</b>	
Home Email	Home Email
Work Email	Work Email
<b>Phone &amp; Fax Numbers</b>	
Home Phone	Home Phone
Work Phone	Work Phone
Home Fax	Home Fax
Work Fax	Work Fax
Home Mobile	Home Mobile
Work Mobile	Work Mobile
<b>Individual Addresses</b>	
Client ID	Address ID
Type	Street
Street Line 1	Line 1
Street Line 2	Line 2
State	State
Postcode	Postcode
Country	Country
Suburb	Suburb

<sup>1</sup> Xeppo is not registered to store Tax File Numbers (TFN). The system will recognise the last 3 digits of an individual's TFN from the source data and this is used in the points-based search and match when linking client data.