

CONNECTOR DATA - CDM

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 if you need further guidance.

Client Profile - Key Details	
CDM	Xeppo
CIID	Client ID
OutCRMID	Code
Referral	Client Referred By
DOB	Date of Birth
Individual	Entity Type
Name	First Name
Surname	Last Name
Pref Name	Preferred Name
Gender	Gender
Occupation Change	Occupation
Employment Duties	Employment Duties
Smoker	Smoker
Date of Death	Date of Death

Contact Details	
CDM	Xeppo
CIID	ClientID
Home Phone	Type = Home Phone
Phone	Value
Addresses	
CIID	Address ID
CIID	Client ID
Address	Line 1
Suburb	Suburb

Postcode	Postcode
State	State
Residential	Type = Street Address

Key Firm Contacts	
CDM	Xeppo
Adviser	Client Adviser
Adviser	Insurance Adviser
AdID	Client Adviser Code

Client Profile - Insurance	
CDM	Xeppo
Insurance Policy Details	
Policy Unique ID	Source Insurance Policy ID
CIID	Client ID
Provider	Provider
Prod Name	Product Name
Policy Owner ID	Policy Owners
Policy Owner	Policy Owner
Super Ordinary ¹	Policy Owner Type
In force	Issue Status
Freq	Frequency
Pol Number	Policy Number
Premium	Instalment Premium
Yes	Insurance Group Under Advice
Comm Date	Policy Start Date
Renewal Date	Next Review Date
Last Ref	Values Last Updated
Annualised Prem	Premium
Pay Method	Policy Notes
Insurance Cover Details	
Policy Unique ID	SourceInsurancePolicyID
CIID	Client ID
CIID	Life Insured

¹ CDM are only sending data to confirm IF the Policy is Owned by Super or an Individual "Ordinary" there is hardcoded connector logic to handle this.

Ben Cat	Cover Type ²
Life & Accidental Life	Life
TPD, Ancillary TPD & Accidental TPD	TPD
Trauma & Ancillary Trauma	Trauma
Income Protection, Ancillary IP & Accidental IP	Income Protection
Business Expense	Business Expense
Ancillary Child Trauma	Other
Cover Subtype	Cover Subtype
Ben Name	Cover Description
Pr Type	Premium Structure
Status	Benefit Status
Is Superannuation	Is Superannuation
IPIncrClaim TrDef AddAncil2Lnkd	Cover Notes
Loading	Loading Notes
Loading	Loadings
Exclusions	Exclusions
Lnkd	Is Flexi Linked
IP Ben Period	IP Benefit Period
Sum Insured	Benefit Amount
Freq	Benefit Frequency
IP Definition	IP Definition
Risk Waiting Period	Waiting Period
Sum Insured	Sum Insured
IPWP	IP Waiting Period
TPD Definition	Cover Name

Additional Information:-

The Client Data provided by CDM is based on the Life Insured. CDM use a connector/provider priority type mechanism to create this record. When a practice first connects to a provider via CDM, the data for the Client or Life Insured is stored and this is the data sent to Xeppo. Data from other providers won't be sent to Xeppo unless this is first in the order of Provider connectors with CDM.

CDM are also only sending data where the Policy Status = In force.

² Where Cover Type = TPD, Subcover Type = Own or Any Occupation.