

## CONNECTOR DATA – Plutosoft

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 Client Details

Plutosoft	Xeppo
ClientID	ClientID
DOB	Date Of Birth
Legal First Name	First Name
Middle Names	Middle Name
Last Name	Last Name
Title	Title
Client Type Name	Entity Type
Sex	Gender
ABN	ABN
ACN	ACN
Occupation	Occupation
Health	Health
Is Smoker	Smoker
Adviser Name	Client Adviser

*\*Plutosoft stores data at the Group level rather than the entity, and therefore Xeppo imports the data from Plutosoft to the Head Entity of the Group.*

*'Head of the Group' is provided by Plutosoft.*

*Activity Data is sourced from Service Data in Plutosoft.*

### Contact Details

Plutosoft	Xeppo
Mobile	Mobile
Home Email	Home Email
Work Email	Work Email
Mobile2	Phone

### Client Compliance

Plutosoft	Xeppo
Risk Profile Name	Investor Risk Profile
Service Agreement Start Date	Agreement Start Date

### Activity

Plutosoft	Xeppo
Compliance ID	Activity ID
Compliance ID	Note Document ID
Service Date	Note Date
Source Type	Source Category
Service Comment	Note Subject