

Flex

The below tables detail the standard Xeppo 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 may have been applied to your connector. Email support@xeppo.com.au if you need further guidance.

Transaction Details

Flex	Xeppo
Contact ID	Code/ Client ID
Client Name	Client Name
ABN	ABN
ACN	ACN
Date End	Termination Date
Date of Birth	Date of Birth
Date Start	Date Became Client
Industry	Industry
Last Name	Last Name
Middle Name	Middle Name
First Name	First Name
Num Dependents	No of Children
Occupation	Occupation
Preferred Name	Salutation
Source	Client Referred By
Title	Title
Flag Household Contact	Is Primary Contact

Loan

Flex	Xeppo
Loan Amount	Amount Borrowed
Latest Balance	Amount Owing
Date Settlement	Date Settled
Financial Institution	Lender
Account Num	Loan Number
Date Last Upd	Record Date

Contact Details

Flex	Xeppo
Contact	
Home Phone	Phone
Home Fax	Home Fax
Email Addr	Email
Mobile Phone	Mobile
Work Fax	Work Fax
Work Phone	Work Phone
Addresses	
Street Address	Line 1
City	Suburb
State	State
Postcode	Postcode
Country	Country

Commission

Flex	Xeppo
Vendor Number	Adviser Code
Payee Last Name	Adviser Name
Commission ID	Commission ID
Total Commission	Gross
Commission	Net
Loan Account ID	Policy Number
Product	Product Name
Product Line	Product Classification/ Type
Financial Institution	Provider
Commission Type	Revenue Type
Invoice Number	Statement Number
Date Processing	Statement Record Date
GST	Tax
Product Line Commission Type	Source ID
Transaction Value	Loan Amount Outstanding