Plan

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.

Commission

Plan	Xeppo
Adviser Code	Adviser Code
Adviser Location	Adviser Name
Client Reference	ClientID
Client Surname	Client Name
Transaction_Reference	Commission ID
Product Type Name Transaction Type Name	FeeCategorySourceID
Transaction CommissionInc GST	Gross
Transaction Group Code	Main Revenue
Transaction Commission	Net
Policy Policy Number	Policy Number
Product Type Name	Product Classification
Product Name	Product Name
Product Type Name	Product Type
Provider Name	Provider
Transaction Type Name	Revenue Type
Drop Number	Statement Number
Transaction Log Date	Statement Record Date
Transaction GST	Tax
Loan Balance	Loan Amount Outstanding
Payment Period	Payment Period Name
Payment Period End	Payment Period End
Contra Net Amount	Contra Net
Contra Gross Amount	Contra Gross
Contra GST Amount	Contra Tax
Transaction Period End	Payment Period Name
Transaction Period End	Payment Period End

Loan

Plan	Xeppo
Policy Policy Number	Loan Number
Loan Balance	Amount Owing
Transaction Log Date	Record Date
Provider Name	Lender
Client Reference	Client ID

Client

Plan	Xeppo
Client Reference	Client ID
Client Reference	Code
Client Given Names	First Name
Client Surname	Last Name

Fee Category

Plan	Xeppo
Product_TypeName Transaction_TypeName	Name
ParentSourceID	ParentSourceID
Product_TypeName Transaction_TypeName	Source ID