# Import Policy Feature

Import policy feature is existing in policy manager, that imports policies data into the system.

This has been enhanced as per the new format of the excel file.

This features supports both xls and xlsx formats.

## Business Logic

Import is based on unique key present in excel file - "Vision Plan ID".

This is considered as policy ID and always expected in excel file. In case, not present, record will not be imported.

The value of this key is saved in policy smart fields and it determines if a record is to be added or updated in database.

Mandatory fields that are updated with each import:

* Policy status
* Original effective date
* Account Exec
* Term date and reason - only if the policy status is terminated, else ignore
* Outgoing Split - overwritten always if present in excel file. Outgoing payments with old schedule will remain intact, new will take effect on new entries only.

Fields to be added for new policy or updated only when found blank:

* Client - If new client is specified in excel, it is added to the system.
* Policy Type
* Policy#
* Submitted Through
* Enrolled
* Eligible
* Advance
* Incoming Schedule - if either false or does not exist or exist with 0 value, only then updated
* TrackFromDate
* PolicyModeId
* MonthlyPremium
* PayorId
* CarrierId
* CoverageId
* ProductType
* Insured

With the above fields policy details and smart fields are saved accordingly.

The template of the excel is fixed in terms of fields. However, for exception handling, we have kept three mandatory fields to be present in the excel, without which the import will not happen and user will be shown an alert indicating the same.

* Import policy ID
* Client
* Original effective date

If only these fields are present, then policy is created and rest values are set to default.

Excel contains one "AccountID" column, which as per Kevin, is for client but we can ignore and use client name to search for Client instead.

Search criteria:

* PayorID - payor name or nickname
* Carrier ID - Carrier name or nickname based on payorID
* Agent - first + Last name or nickname and if any character found after name like (,[,-, it is ignored and string before that is considered name.
* Account Exec - first + last name or nickname

## Import Policy ID

This is a new smart field that holds the policy ID obtained from the excel file.

It is shown in smart fields section. It remains "read-only" for agents and can only be modified by the super user.