

Upload Insurance Format

Allowed File Types / Extensions : .csv

The first row or **Header** of the .csv file must contain all the *fields* or the column names of each pending check entry you plan to add into the system.

These column cells must be in the **first** row of the .csv file and in **this order, with the exact spelling below:**

1. vendid
2. invoice_date
3. amount
4. effective_date
5. policy_num
6. prop
7. gl_acct
8. remark
9. auto_renew
10. ins_total
11. ins_building_val
12. ins_rent_val
13. ins_sf
14. payer
15. number_payment
16. monthly_payment
17. start_pay_date
18. broker
19. carrier
20. date_insured
21. occ
22. building_value
23. deductible
24. lor
25. building_ordinance
26. general_liability_limit
27. general_liability_deductible
28. insurance_company

- 29. insurance_premium
- 30. down_payment
- 31. installments

In addition, each cell has certain input / validation rules that you must follow. Each validation rule and description is listed below:

Field	Description
vendid	Required. This is the vendor code, not the vendor ID. The maximum input length of this value is 15 characters long
invoice_date	Required. Must be a date value with the format of YYYY-MM-DD
amount	Required. Must be a number between 0 and 10000000
effective_date	Required. Must be a date value with the format of YYYY-MM-DD
policy_num	Required. This is the insurance's <i>Policy Number</i> . Must be an input value with a maximum length of 255 characters
prop	Required. This is the property number associated with the insurance
gl_acct	Required. This is the GL Account number associated with the insurance.
remark	Required. Must be an input value with a maximum length of 255 characters.
auto_renew	Required. Can only be one of 2 values : (Yes / No)
ins_total	Required. This is the insurance's <i>Total Insured Value</i> . Must be a number between 0 and 10000000
ins_building_val	Required. This is the insurance's <i>Insured Building Value</i> . Must be a decimal value between 0 and 10000000

ins_rent_val	Required. This is the insurance's <i>Rents Value</i> . Must be a decimal value between 0 and 10000000
ins_sf	Required. Must be a number between 0 and 10000000
payer	Required. Can only be one of 2 values: (Owner / PAMA)
number_payment	Required. This is the insurance's <i>Number of Monthly Payments</i> . Must be an integer between 0 and 12
monthly_payment	Required. Must be a number between 0 and 10000000
start_pay_date	Optional. This is the insurance's <i>Monthly Start Pay Date</i> . Must be a date value with the format of YYYY-MM-DD
broker	Optional. Must be an input value with a maximum length of 255 characters.
carrier	Optional. Must be an input value with a maximum length of 255 characters.
date_insured	Optional. Must be a date value with the format of YYYY-MM-DD
occ	Optional. Can only be one of 16 values: (1 Unit / 1-4 Unit / 3 Unit / 4-Plex / APT / Commercial / Duplex / Dwelling / H / Industrial / Land / Retail / SFD / SFR / Tri-Plex / Vacant Land)
building_value	Optional. Must be a number between 0 and 10000000
deductible	Optional. Must be a number between 0 and 10000000
lor	Optional. Must be an input value with a maximum length of 255 characters.
building_ordinance	Optional. Must be an input value with a maximum length of 255 characters.
general_liability_limit	Optional. Must be an input value with a maximum length of 255 characters.
general_liability_deductible	Optional. Must be an input value with a maximum length of 255 characters.

insurance_company	Optional. Must be an input value with a maximum length of 255 characters.
insurance_premium	Optional. Must be a number between 0 and 10000000
down_payment	Optional. Must be a number between 0 and 10000000
installments	Optional. Must be a number between 0 and 10000000

Note:

1. Make sure to follow up those header name(s) / column(s).
2. Make sure every row follows the above validation descriptions. Otherwise it will display an error or skip the row during the import process.

Below is an example snapshot of how the csv file should be formatted. The example below is in an **Excel Workbook**:

vendid	invoice_da	amount	effective_	policy_nu	prop	gl_acct	remark	auto_rene	ins_total	ins_build	ins_rent	payer	number_r	monthly	start_pay	bi
ARTCAM	8/29/2019	123	8/31/2019	1241	9	602	Rent	No	125	125	125	PAMA	1	1200	10/1/2019	A