**Script:**

anthem-merge.pyw

**Purpose:**

To perform a join between customer Branding Grid and Dated Mailing List. Once to assign addresses to an envelope list, and second to add data that is too large for BCC (over 255 chars).

**Requirements:**

1. Data:
   1. Branding Grid (.xls/.xlsx) – file provided by customer
   2. Mailing List (.csv) – file provided by customer
2. Merge:
   1. Branding Grid (.xls/.xlsx) – file provided by customer
   2. Mailing List (.csv) – file processed/presorted by BCC.

**Output:**

* *Data*
  + Mailing List Breakdown. An Excel file that lists the quantities of each envelope and how many of each contract is in the specified envelope list. It also lists contract numbers that do not match the current branding grid.
  + Envelope Lists. A csv file for each of the Envelope types to be processed by BCC.
* *Merge*
  + Finalized .csv file. File that has been merged with the branding grid and had records created and added to top of the list for proofing.

**Functions:**

main():

* Generate user friendly GUI to ask for files and ask which task to perform: Data or Merge.
* Process branding grid - [initialize\_branding\_grid](#initialize_branding_grid)()
* Process mailing list - [initialize\_mailing\_list()](#initialize_mailing_list)
* Perform tasks based on user selection: Data or Merge.
  + Data:
    - Reduce branding grid to just Contract Number and Envelope Columns
    - Left join Branding Grid and Mailing List on Contract Number
    - Output .csv files: [output\_envelope\_csv()](#output_envelope_csv)
    - Output summary: [list\_summary()](#list_summary)
  + Merge:
    - Drop ‘Envelope’ column from processed list.
    - Left join Branding Grid and processed Mailing List on Contract Number
    - Generate proof records: [generate\_proofs()](#generate_proofs)
    - Output file to csv.

initialize\_branding\_grid():

* Import branding grid
* Trim whitespace from grid headers and grid data.
* Fill in empty cells in ‘Envelope’ column with ‘Anthem’
* Fill n/a values with empty space
* Combine contract column data using [branding\_grid\_col\_merge()](#branding_grid_col_merge).
* Remove any duplicate Contract Numbers.

branding\_grid\_col\_merge():

|  |
| --- |
| Contract Number |
| H8432-018-NYMCRWP0-0590 |

|  |  |  |  |
| --- | --- | --- | --- |
| Cms Contract | 2018 Pbp | Sourcegroupnumber | Sourcesubgrpnbr |
| H8432 | 018 | NYMCRWP0 | 0590 |

* Combine contract column data into one single contract number.

initialize\_mailing\_list():

* Import mailing list
* Create 3 tier and 2 tier versions of the List Contract Number for matching with branding grid.  
  **4 tier:** H8432-018-NYMCRWP0-0590 | **3 tier:** H8432-018-NYMCRWP0 | **2 tier:** H8432-018
* Assign values to Contract Number based on matching List Contract Number to Branding Grid.   
  Check for 4 tier first, if no match, then try 3 tier, if no match, then assign 2 tier Contract Number.
* Remove temporary columns once data has been matched

output\_envelope\_csv():

* Separate list by Envelope data (‘Anthem’ or ‘Amerigroup’)
* Output each list to .csv file.

list\_summary():

* Fill empty values with #N/A.
* Group data by version of Envelope (‘#N/A’, ’Anthem’, ’Amerigroup’).
* Separate data into individual DataFrames for output.
* Output summarized information to excel.

generate\_proofs():

* Get list of unique Contract Numbers
* Get first 2 records for each unique Contract Number.
* Add column that identifies records as proofs.
* Insert proof records into main DataFrame.