

CodySoft February 11th 2021 release notes:

PBP Module:

1. Companion data Column A header and column B description:

Upload Schema

PBP Companion Data PBPDICT.mdb

Select a Schema file. It must be a Companion-formatted .xlsx file.

Plan Layout Direction
Columns

Indicate whether Plans sit in rows or columns

☒ Pull Field Header and Field Description from column A/B per field

SBTESTCV2022_Master_companion_file_2-9-21.xlsx

Companion Table Name

This will identify the table when managing its data.

Contract Number Field

Select the field that identifies the plan's Contract Number.

Plan Identifier Field

Select the field that identifies the plan's identifier.

Segment Identifier Field

Cancel Save

2. Large Data load messaging

a. File Import

The system is processing your import. It will appear in the Past Imports section once complete.

b. Schema Upload

Schema upload is being processed. You will be notified as soon as it is finished. You may continue with your work in the meantime.