# Import/Export Broadacre Field Function

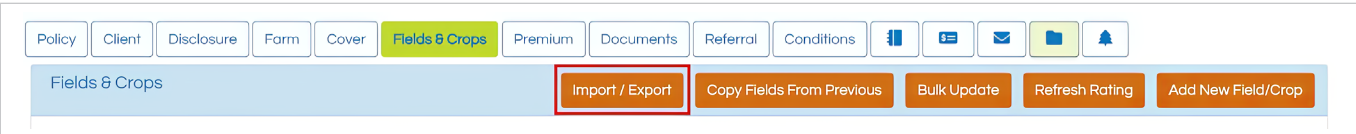
## Broker Instruction Guide
## Laserbeam

## Overview

The Import/Export function lets you export field and crop data to Excel, update it in bulk, and re-import it to populate your New Season or New Business quote.

## Step-by-Step Guide

1. Create a **new quote**, complete the disclosure questions, and update the farm details
2. Then navigate to the **Fields & Crops** page. You will see an **Import / Export** button.
   Click this to open the Import/Export window.
   a. Please Note: for **New Business** quotes, **Farm** details must be entered at a minimum for this function to work.



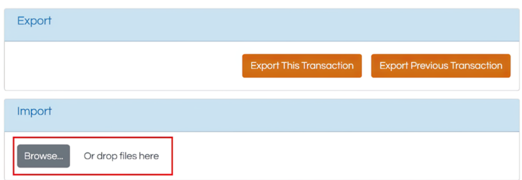

### Export Function

3. You will be presented with two export options:
   a. **Export this transaction**
      - Exports the current fields and crops listed on the schedule
      - If no paddocks exist, a blank template will be generated for completion.

   b. **Export previous transaction**
      - Exports the previous season's fields and crop where available
      - Use this as a base to update for the current season.
4. Open the export and follow the instructions
   a. Update the Field & Crops data
   b. If you are having issues updating the fields, make sure you have **Enable Editing**.
      This will appear in the yellow box at the top of the sheet
   c. Ensure you complete all mandatory fields. These include all orange columns.
5. Save the updated Excel file to a designated folder on your computer.

### Import Function

6. Reopen Laserbeam and navigate to the **Field/Crop** tab. Select **Import/Export,** then use the Import – Browse button to locate your exported file, or simply drag and drop the Excel file directly into the box.
7. Successful Upload - If the upload is successful, the pop-up will close automatically, and your fields and crops will populate in Laserbeam.



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## Further Changes

- If further amendments are required:
    a. Use "**Export This Transaction**"
    b. Make your changes in Excel
    c. Re-import the updated file.

## Error Handling

- If an error occurs during upload:
    a. Refer to the Import Results Table displayed in the pop-up.
    b. This will show:
        i. The error description
        ii. The specific row(s) causing the issue
    c. To resolve:
        i. Open your Excel file
        ii. Correct the identified errors
        iii. Save and re-import the file.
- For example – The below example says
    i. There is an invalid insured percentage (%) on row 9
    ii. No optional benefit has been entered on row 11
    iii. No harvest method has been selected for a canola crop on row 12.

Import Results

3 error(s) encountered when attempting to import file. Please correct this and try again.

| Row | Error |
|---|---|
| 9 | Invalid % Insured |
| 11 | No Optional Benefits entered |
| 12 | No Canola Harvest Method entered: must be selected when crop type is Canola |

# Tips and Tricks

- To speed up data entry, you can duplicate a value by selecting a cell and dragging it downward to fill additional rows automatically.
- The Export does not allow changes to the Hail excess or selection of the Market Value optional benefit. However, both can be updated using the **Bulk Update** function on the **Fields and Crop** Tab.

**Please review all information before submitting to ensure it is correct.**