

MarkeTrak Bulk Insert Tips and Tricks

Tip 1 - Deleting the header row

Be sure to delete the header row of the bulk insert template from your spreadsheet before saving in the CSV (Comma Separated Value) file format.

A	B	C	D	E	F	G	H	I	J
ESI ID (1)	Orig Tran ID (required if 867_03F) (2)	Tran Type (3)	Transaction Date (4)	GS Number (5)	Comments (required if Reject Cd = A13) (6)	ESIID Duplicate Check (7)	Global ID Duplicate Check (8)	Assignee (9)	ESIID V (10)
Req	R/O	Req	Req	N/A	Opt	Opt	Opt	Req	Req

Tip 2 – One template, one subtype

You can only submit multiple issues via bulk insert for the same subtype.

Tip 3 – Avoid commas in comments

Avoid commas (,) in any comment you want to add to the MarkeTrak issue through Bulk Insert. Since the Excel Spreadsheet Bulk Insert Template is saved as a .CSV (Comma Separated Value) file, any comma in a comment field will be recognized as a delimiter and throw off the column count causing the file to fail.

Tip 4 – Caution when copying ESI IDs

Be careful copying ESI IDs from your system and pasting into the Excel Spreadsheet Bulk Insert Template. A normal copy and paste can result in the 17 digit ESI ID being automatically formatted by Excel in Scientific Notation Format (example 1.04437E+16). Changing the format of the cell in the spreadsheet will result in the last two digits of the 17 digit ESI ID to change to 00. This will cause the MarkeTrak issue to be created using the wrong ESI ID. Solution:

- Open the Excel Spreadsheet Bulk Insert Template and Right Click in the ESI ID cells.
- Select Format Cells and choose Text from the list.
- Copy your ESI ID from your source document and Right Click in the ESI ID cell and choose Paste Special and then choose Text.

This will paste the 17 digit ESI ID into the spreadsheet in text format and avoid Excel changing the ESI ID format.

Tip 5 – Ensure all rows are accounted for

Before submission of the bulk insert CSV file the user should ensure all rows are accounted for in the file template to successfully pass validation for submission of the file.

Tip 6 – Checking validation errors

If you receive a validation error, go to notepad and open your CSV file to determine where the error has occurred and correct it. Once the error is corrected save the file with a new name. If you do not save with a new name your corrections will not be saved to the corrected file.

Tip 7 – Request all validations occur

Select all the validations to ensure your data is valid and does not contain duplicates.

Tip 8 – Correct format on dates and times

Be your date time field has the correct format and populates the field in the T-format. If not formatted correctly your bulk insert file will not pass validation.

DateTime format = **ccyy-mm-ddThh:mm:ss** eg: **2015-11-15T13:20:57**

Date format = **ccyy-mm-dd** eg: **2015-11-15**