

Ticket-It Bulk Upload Spreadsheet with error-cleansing Macro

To use it:

1. Open the "Ticket-it Address upload 2011 template - Macro.xltm" file.
2. You should see a security alert popup or a yellow bar underneath the top toolbar. Click Options and "Allow Macros".
3. Copy and paste data from the source spreadsheet or database into the appropriate columns. See next section for information on where to place the data if you're not sure.
4. [Excel 2007] click the **View** Tab. Click on the **Macros** button. Select *Address_cleanser_mark3* and click **Run**. When asked if the macro should automatically insert TRUE or FALSE into the SignatureRequired column, click Cancel if you have already filled in the values, otherwise the macro may crash.
5. Save as a tab-delimited txt file. Upload to Ticket-It. If you have more than 500 rows of address data, split the data up into "chunks" of 400 rows at a time and upload each chunk separately. Each chunk will need the column headers at the top. It's best to split the data *after* the macro has run.

Where to place data:

Any columns with red titles must contain values for every receiver at time of upload.

1. **ReceiverQuickName** – Place QuickNames in this column. A Quickname is a value you can use to later search for the associated receiver. Internally used store numbers or shortened versions of names are good.
2. **ReceiverCustomerReference** – Place Customer References in this column. A Customer Reference is a value that, when printed on a label, can later be used to search for the associated tracking data via Tracking, History, and Reports. This value is technically a default as it can be changed on a per-label basis.
3. **ReceiverDeliveryInstructions** – Place Delivery Instructions in this column. For example, "Deliver between 4 and 5pm". This value is technically a default as it can be changed on a per-label basis.
4. **ReceiverContact** – The name or job role of someone at the receiver address who is to be contacted if the package cannot be delivered. If you leave any cells in this column blank, the macro will insert values automatically.
5. **ReceiverCompany** – The company name of the receiver's business. This value can be used to search for the receiver, so it's important to have good data here. In the case of a receiver who is an individual, not a business, it's good practise to place the individual's name in this column.
6. **ReceiverAddress1** – Place any floor numbers, building numbers, apartment numbers, etc, in this column. For example, "Store 99", "Floor 7", "Unit 1".
7. **ReceiverAddress2** – Place Building Names in this column. For example, "Lynn Mall", "Bio Building, Auckland University".
8. **ReceiverAddress3** – Place a street number and a street name in each cell in this column, OR a PO Box address. For example, "11 Test Street" and "PO Box 89374" are valid values. There **must** be a value in every cell in this column or Ticket-It will not upload the file.
9. **ReceiverAddressType** – Insert a "1" into this field (minus the quotes) to specify that the row is a Street Address. Insert a "2" to specify that the row is a PO Box address. The macro will automatically insert the correct values if any cells in this column are left blank
10. **ReceiverAddressTown** – This column is for the Town name. Be careful when placing data into this column as, unusually, this column comes *before* the suburb column, so it's easy to make a mistake. Examples of Town names are "Auckland", "Wellington", "North Shore City". There **must** be a value in every cell in this column or Ticket-It will not upload the file.
11. **ReceiverAddressSuburb** – This column is for the Suburb name. Ideally there should be values inserted into every cell in this column. The macro will bring up a prompt during execution asking whether to copy neighbouring Town values into blank suburb cells. This typically fixes situations where the Town name is also the Suburb name. There **must** be a value in every cell in this column or Ticket-It will not upload the file.
12. **ReceiverRuralDeliveryAddress** – Place any RD numbers into this column. Here are some examples of valid values: "RD 4", "RD 3".
13. **ReceiverAddressPostalCode** – Insert Postcodes into this column. If you leave any cells in this column blank, the macro will insert values automatically.
14. **ReceiverAddressPhone** – Insert Contact phone numbers into this column. Insert one phone number per cell only. The macro will automatically remove text and invalid characters from this column. If you leave any cells in this column blank, the macro will insert values automatically.
15. **ReceiverAddressMobile** – Insert Contact mobile numbers into this column.
16. **ReceiverAddressEmail** – Insert email addresses into this column. Insert one email address per cell only.
17. **ReceiverAddressFax** – Insert Fax numbers into this column.

18. **SendConfirmationEmails** – Insert “TRUE” into cells in this column for receivers you wish to have a confirmation email automatically sent to when labels printed for those receivers are scanned. Note that an email address will need to be specified in the ReceiverAddressEmail cell on that row as well for this feature to work. Any blanks in this column will automatically have “FALSE” inserted by the macro.
19. **ReceiverCostCentre** – Cost Centre names can be specified in this column.
20. **SignatureRequired** – Insert “TRUE” into cells in this column for receivers you wish to have the Signature Required tick checked by default. Insert “False” for receivers you wish to have the Signature Required tick *unchecked* by default. You can leave these cells blank to let Ticket-It use whatever the default Signature setting is for your Ticket-It account. The macro will give you the opportunity to automatically fill any blanks in this column with a specified value.

About the Macro:

What it does:

- Removes all invalid characters
- Trims all cells to a valid length
- Changes Pt, St, and Mt to Point, Saint and Mount in the Suburb column (as Ticket-It does not accept the shortened versions)
- Changes items such as “Auckland” in the Suburb column to “Auckland Central”, and similar, whilst modifying invalid items such as “Auckland CBD”
- Changes values in the Town column based upon the neighbouring Suburb cell. For example, if “Green Bay” is in the Suburb column, the neighbouring Town cells are changed to “Waitakere”. This function fixes a huge number of common town/suburb mismatches.
- Strips numbers from text-only columns
- Strips letters from number-only columns
- Auto-fills empty cells with filler text if they are in mandatory columns (ie **receiverContactName** cells will have “.” inserted if blank). Does not autofill **ReceiverAddress3** or **ReceiverAddressTown**.
- Copies the neighbouring Town value into blank suburb cells (if user accepts)
- Removes hyphens from PO Box numbers (as Ticket-It doesn’t use them)
- Tidies up PO Box text (changes items such as “P.O. Box” and PO. Box” to the correct text)

What it doesn’t do:

- It won’t fix disastrous spelling mistakes!
- It won’t replace incorrect Town values if the neighbouring Suburb exists in two or more Towns (eg. There are two Masseys in New Zealand in different towns). This is to avoid creating wrong addresses!

Notes:

- Because the macro basically guarantees there will be no upload errors (apart from blatant mistakes in town/suburb or the odd unaccounted-for invalid character), you can upload in far larger chunks than normal. Uploading in chunks greater than 500 can cause Ticket-It to timeout, however. When this error occurs, all clean records will be uploaded anyway, but records with errors will be lost.
- Disabling the security settings in Excel 2003 might be difficult or impossible depending upon your configuration. If in doubt, upgrade!