



UPLOADING A .CSV SPREADSHEET

Frequently Asked Questions

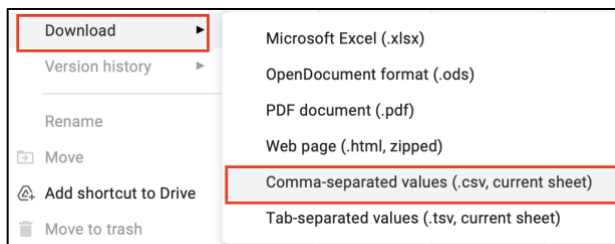
The mass upload/.CSV spreadsheet is the most common way to issue badges to prospective earners and to update metadata for existing earners. In order to do so successfully, there are several things to consider. This FAQ document will provide some guidance in how to best perform this task.

Please note: Uploading the .CSV file to the platform is the trigger to issuing badges. In other words, once you go to My Earners > click Mass Upload Roster > Select Files > and click “Submit” your LIVE badges will be issued to your earners.

1. Download the .CSV format TEMPLATE

Click [HERE](#) for the .CSV file template. Make sure that you save it as a .csv file (Exhibit 1).

Exhibit 1: CSV file Template Download



2. Your file must be uploaded to BadgeCert in a .CSV format

Sometimes- especially if you are cutting and pasting your earner data from another spreadsheet- you may save the file as a .xls file. However, in order to upload to BadgeCert, your file must be saved as a *.csv file* or your upload will fail. Please make sure that your file is saved as a .csv file.

3. Do not alter the header on the .CSV file template

The template header (row 1 outlined in red in Exhibit 2 below) should not be changed or altered in any way when the file is uploaded. If the header is altered, you will receive the error message “Invalid headers or missing badge issuance headers” and your file upload will fail.

Please note: If you do not want to populate a specific field represented in the column, DO NOT delete the column- simply leave it blank. As an example, if you do not want to populate “company” for your badges (column I), do not delete the column- just leave it blank. If you leave it blank, the field (or field title) will not populate on the badge metadata.

*However, as an exception, if you do not populate the “expiration date” field, “Ongoing” will automatically be added on the badge metadata indicating there is no expiration date.



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Exhibit 2: CSV file Header

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
1	First name	Last name	email	Phone Country Code	phone	Phone Extension	Mobile Country Code	Mobile Number	Company	Title	badge1	issuedate-b1	expDate-b1	location-b1	issuerName-b1	issuerNotes-b1	licenseName-b1	licenseNumber-b1	issuerReferenceLink	artifact2-b1	artifact3-b1
2	Test	Earnor	bc1561test55555@yopmail.com	+1	480-48-12098				Intraedge	Director	6962	8/22/2020		LOCATION	DIVYA ISSUER NAME				badgecert.com		
3	Test	Earnor	earner/test-org7i-2@yopmail.com	+4	480-48-12098	123			Intraedge	Director	6962	8/22/2020		LOCATION	DIVYA ISSUER NAME				badgecert.com		
4	Test	Earnor	earner/test-org7i-2@yopmail.com	001	480-48-12098	123	91	4804812098	Intraedge	Director	6951	8/22/2020	8/25/2020	LOCATION		DIVYA ISSUER NOTES	Certificate	ABC123	badgecert.com	badgecert.com	http://www.pdf995.com/samples/pdf.pd

4. Entering data in the roster fields

Roster fields are the fields in the header that you populate with information that will display on each individual earner's badge (Exhibit 2 in red). You insert your data in these fields to (a) upload the list of earners to which badges will be issued, (b) add a new earner to a roster of earners, (c) update any field other than email address. If you want to issue multiple badges to a single earner using the .csv file, simply enter the earner's information on multiple lines, but change the badgeID to represent each badge that you would like to issue.

Please note: If you do not want to populate the field represented in the column, do not delete the column- simply leave it blank. Exhibit 3 below is a list of required and optional fields.

Exhibit 3: Badge metadata fields- required and optional

Field name	Required	Example
First name	Yes	John
Last name	Yes	Doe
email	Yes	jdoe@badgecert.com
Phone country code	Yes, only if phone # is provided	1
Phone	No	312-555-5555
Phone extension	No	12
Mobile Country Code	No	+44
Mobile Number	No	3125555555
Company	No	BadgeCert Inc
Title	No	Benefits Manager
badge1 ID	Yes	1234 (See Exhibit 5 for where to locate ID)
issuedate-b1	Yes	1/1/2014 (This must be MM/DD/YYYY)
expDate-b1	No	01/01/2015 (This must be MM/DD/YYYY)
location-b1	No	Typically organization location, but can be "online" or earner location
issuerName-b1	No	CompanyX
issuerNotes-b1	No	John passed the final oral exam with 100%. (This information will not populate on badge metadata)
licenseName-b1	No	Wood Floor Recovery
licenseNumber-b1	No	01234567
IssuerReferenceLink	No	URL link that is displayed in the badge metadata under "Issuer Name" (Recommended)
artifact2-b1	No	http://fake.programdetails.com
artifact3-b1	No	http://fake.programdetails.com



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5. Do not leave empty columns at the end of spreadsheet

Please make sure that there are no empty fields after “artifact3-b1” (field column “U” in Exhibit 1) on the .CSV file template. If this occurs, you will receive an error message that says “Incomplete Data.” Please note: In total, there are 21 field columns (A-U).

If extra columns beyond 21 have been added, you will get an error message (Exhibit 4) with commas representing the empty columns and your file will fail to upload. If this occurs, go back to the file and remove/delete the extra columns past “artifact3-b1” and upload your file again.

Exhibit 4: Sample error message



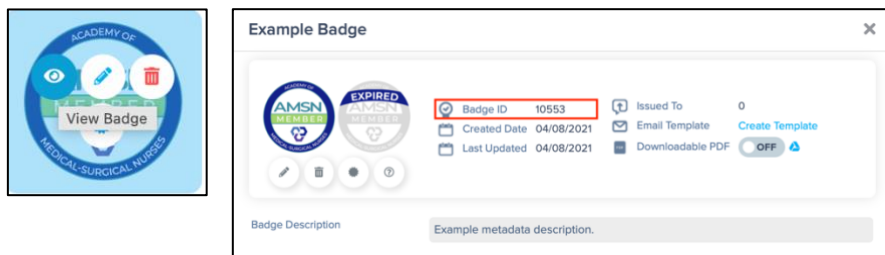
6. Use the correct date format

On the .CSV file, the date format for both the issue date and expiration date must be in the format mm/dd/yyyy (see Exhibit 2- columns L and M). If the date is not in this format, the file upload will fail.

7. How to find the Badge ID

In order to find the BadgeID (Column K in Exhibit 2), which is required to issue the badge, go to ‘My Badges’ click on the badge you want to issue, click ‘View Badge’ and that is where you will find the BadgeID. The BadgeID is auto-generated by BadgeCert’s system when you create a badge (See Exhibit 5).

Exhibit 5: View badge and Badge ID location.



8. Delayed response time for validation of upload

While most files get uploaded immediately, badge files can take a few hours to upload. You should get a confirmation within 2 hours of uploading your file.



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9. Updating badge information report

If you have already issued badges and want to update the existing badge information (i.e. update the expiration date) you can upload either a new .CSV file, or an existing .CSV file with only a simple change in the data for some of the earners on the list. If you upload the file and receive the message “Nothing to update for...” it is not an error message (Exhibit 6). It simply means that the list of changes was successfully uploaded, and there was no data updated for the earners on the list where you see the “Nothing to update for” message.

Exhibit 6: Report for updated badges

```
Nothing to update for : test@testest.com and badge : 8173
Nothing to update for : tchiefari@clairemfg.com and badge : 8173
Nothing to update for : amandamerkel89@gmail.com and badge : 8173
Nothing to update for : anner.mejia@grupomisol.com and badge : 8173
Nothing to update for : bill@johnsoncleaning.com and badge : 8173
Nothing to update for : jpro@mediclean.ca and badge : 8173
Nothing to update for : evan.self@prosquaredjanitorial.com and badge : 8173
Nothing to update for : cdyson1952@yahoo.com and badge : 8173
Nothing to update for : Sparkleservices@sbcglobal.net and badge : 8173
Nothing to update for : administration@colonialmaintenance.com and badge : 8173
Nothing to update for : dlawson@japosid.com and badge : 8173
Nothing to update for : ivalcourt@valcourt.net and badge : 8173
```