

Streamlined Warranty Claim Submission Using the Bulk Warranty Claim Form on the Enertech Support Site

Summary

This document provides guidance on submitting warranty claims efficiently using the [Bulk Warranty Claim](#) Form on the Enertech Support Site and outlines how to automate CSV data handling in Excel with Power Query. It explains the steps for setting up Power Query to always use the newest CSV export and details both the one-time and recurring actions required to maintain and refresh claim data in Excel.

This document assumes you have some sort of exportable warranty claim form of your own. Usually this would be a web form on your own website. Typically, webform vendors provide some way of exporting part or all of the submissions at once. Comma Separated Values (CSV) is a very common format for these types of exports.

So what we are trying to accomplish is an automated way of converting the output of your form submissions (your CSV file), to the import format of our Bulk Warranty Claim form (our CSV file).

Power Query “From Folder” (always uses the newest CSV)

What you’ll do (once)

- Point a query at a folder where the CSV exports land
- Have Power Query automatically pick the **latest** CSV
- Promote headers
- Reorder and rename columns into your target order
- Load to a Table in Excel

What you’ll do (every time)

- Save the new CSV into that same folder
- In Excel: **Data** → **Refresh All** (or set it to refresh when opening)

Step-by-step (One-time setup)

1) Create folder to hold claim form exports

Example:

C:\ ... Documents\MyClaimFormExports

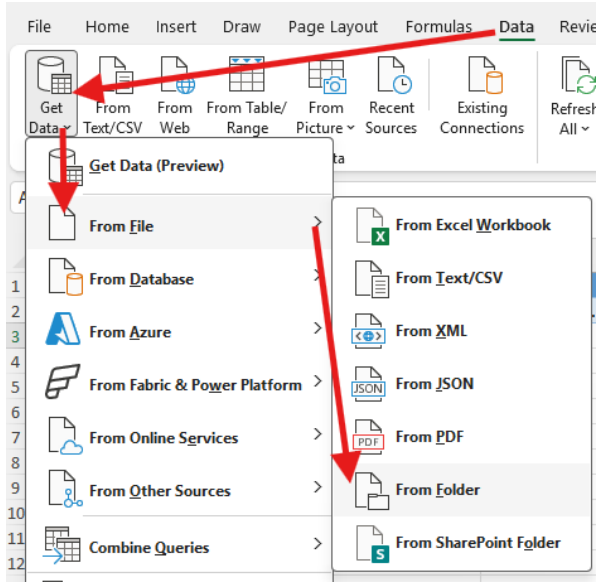
Tip: Keep *only* the exports you want considered, or use a filename filter later.

2) Create Excel Document

This can be put into the same folder, or anywhere else, but you'll reuse this file every time you do a conversion.

3) Create the query: Data → Get Data → From File → From Folder

1. Excel ribbon: **Data** → **Get Data** → **From File** → **From Folder**



2. Choose your export folder → click **OK**
3. In the preview window, click **Transform Data**
(This opens Power Query Editor.)

4) In Power Query: keep only CSVs and pick the newest

In Power Query Editor:

1. Filter the **Extension** column to only: .csv
2. Sort the **Date modified** column **Descending**
3. **Home** → **Keep Rows** → **Keep Top Rows** → **1**

Now the query always selects the single newest CSV in that folder.

5) Combine/Read the selected CSV content

You'll see a **Content** column (binary). Do this:

- Click the **Content** cell (binary) (or use the small "Binary" link), and Power Query will open the file contents.
- If it doesn't auto-parse:
Home → Combine → Combine Files (Power Query will generate helper steps).

Then:

- **Home → Use First Row as Headers** (Promote headers)
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6) Reorder and/or rename columns to your target order

Once your table is visible:

- Drag columns into the desired order **OR**
 - Right-click a column → **Move** → Left/Right/To Beginning/To End
 - The final column structure should match the sample CSV on the Bulk Warranty Claim Page.
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7) Load it into Excel

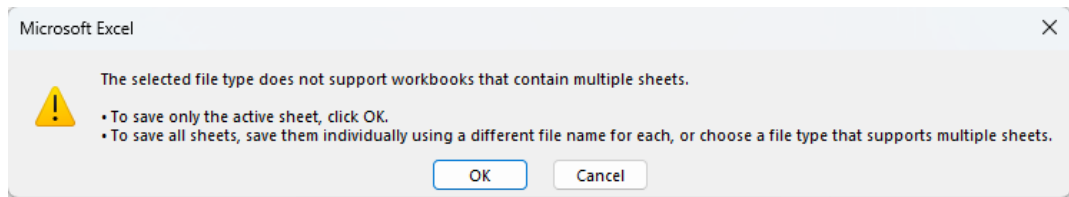
- **Home → Close & Load**
(or **Close & Load To...** → Table on a new worksheet)

8) Save your Excel Workbook

Day-to-day workflow (super simple)

1. Save/export the new CSV into the folder (likely this would come from your website)
2. Open your Excel workbook (the one with the query)
3. **Data → Refresh All**
4. Then go to the worksheet that contains the transformed data table.
5. Click **File → Save As**
 - a. Name your file (ex. ReadyToUpload.csv)
 - b. Choose "CSV (Comma delimited) (*.csv)" as the file type.
 - c. Press: **Save**

6. Excel will give you a warning:



7. Just press OK.

8. Your Excel window is now open to your saved CSV.

9. Use the Failure Code Lookup to populate the failure codes for each warranty claim.

10. Upload your CSV to the Bulk Warranty Claim Form on the Enertech Support Portal