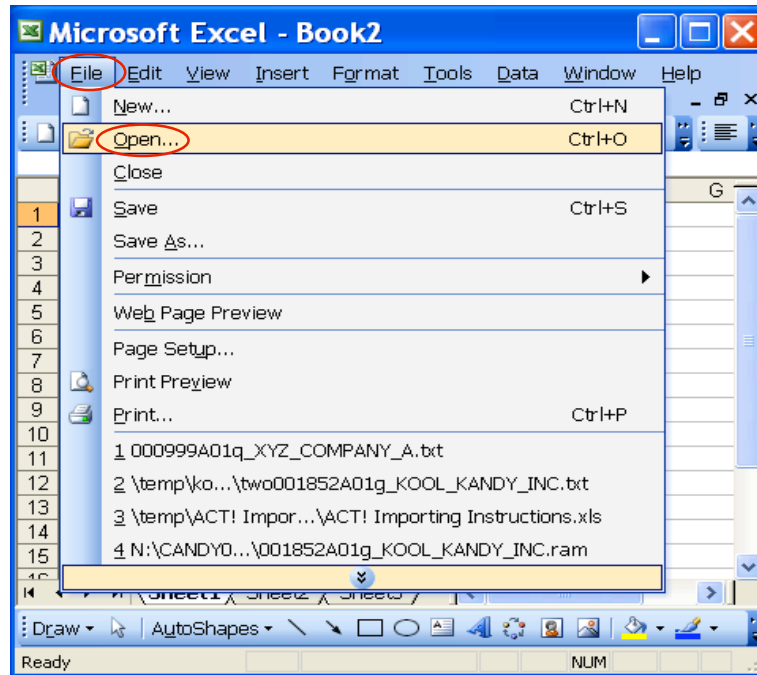# CompuLEAD Data Import Instructions: Microsoft Excel 2003 CSV Format
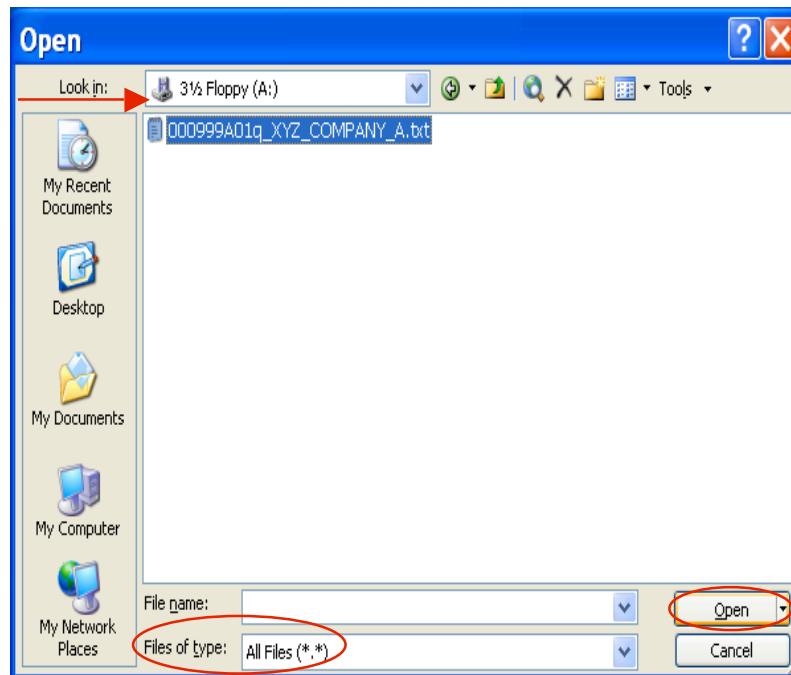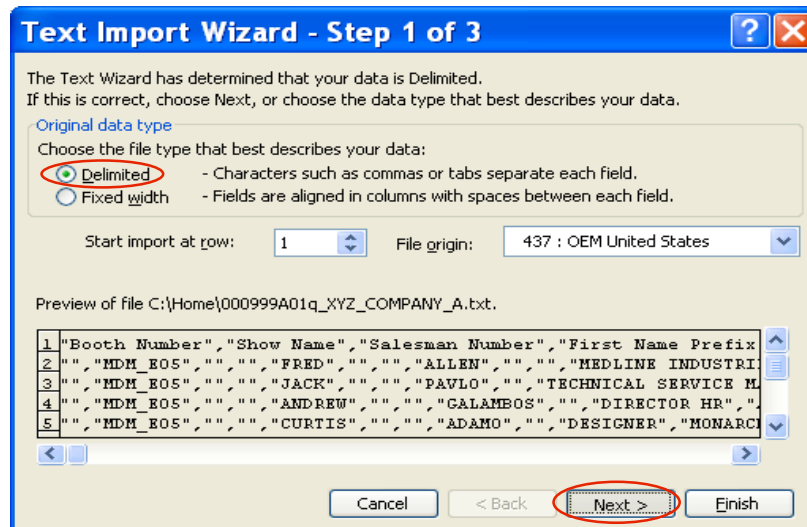
Open Excel

Click File

Click Open

Click Look in: field and locate your file .txt

Change the Files of type: to All Files (*.*)
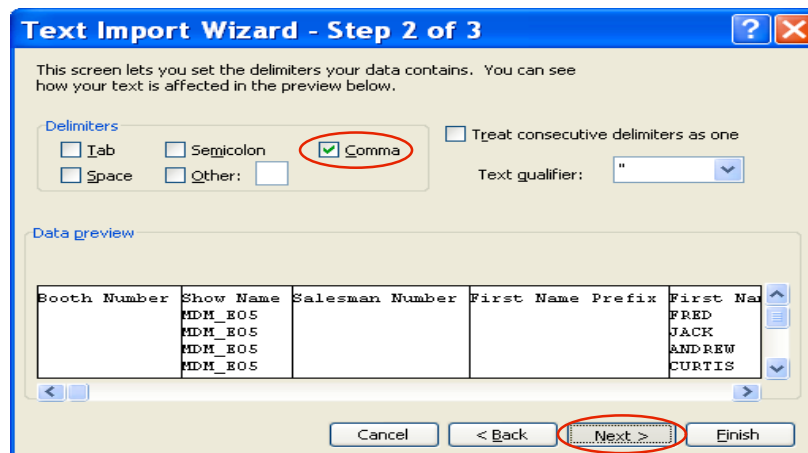Click Open

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Click Delimited

Text Import Wizard - Step 1 of 3

The Text Wizard has determined that your data is Delimited.
If this is correct, choose Next, or choose the data type that best describes your data.

Original data type

Choose the file type that best describes your data:

○ Delimited   - Characters such as commas or tabs separate each field.
○ Fixed width - Fields are aligned in columns with spaces between each field.

Start import at row: 1   File origin: 437 : OEM United States

Preview of file C:\Home\000999A01q_XYZ_COMPANY_A.txt.

```
1 "Booth Number","Show Name","Salesman Number","First Name Prefix
2 "","MDM_E05","","","FRED","","","ALLEN","","","MEDLINE INDUSTRI
3 "","MDM_E05","","","JACK","","","PAVLO","","TECHNICAL SERVICE M
4 "","MDM_E05","","","ANDREW","","","GALAMBOS","","DIRECTOR HR","
5 "","MDM_E05","","","CURTIS","","","ADAMO","","DESIGNER","MONARC
```

Cancel   < Back   **Next >**   Finish

Click Next >

Text Import Wizard - Step 2 of 3

This screen lets you set the delimiters your data contains. You can see
how your text is affected in the preview below.

Delimiters

☐ Tab   ☐ Semicolon   ☑ Comma   ☐ Treat consecutive delimiters as one
☐ Space ☐ Other: Text qualifier: "

Select Comma

Data preview

Booth Number	Show Name	Salesman Number	First Name Prefix	First Na
	MDM_E05			FRED
	MDM_E05			JACK
	MDM_E05			ANDREW
	MDM_E05			CURTIS

Cancel   < Back   **Next >**   Finish

Click Next >

1. Move the scroll bar to all the way to right at the bottom of the Data preview window
2. Hold down the shift key and click in the Data preview window to highlight the entire data
3. Click "Text" in Column data format section.
4. Click Finish
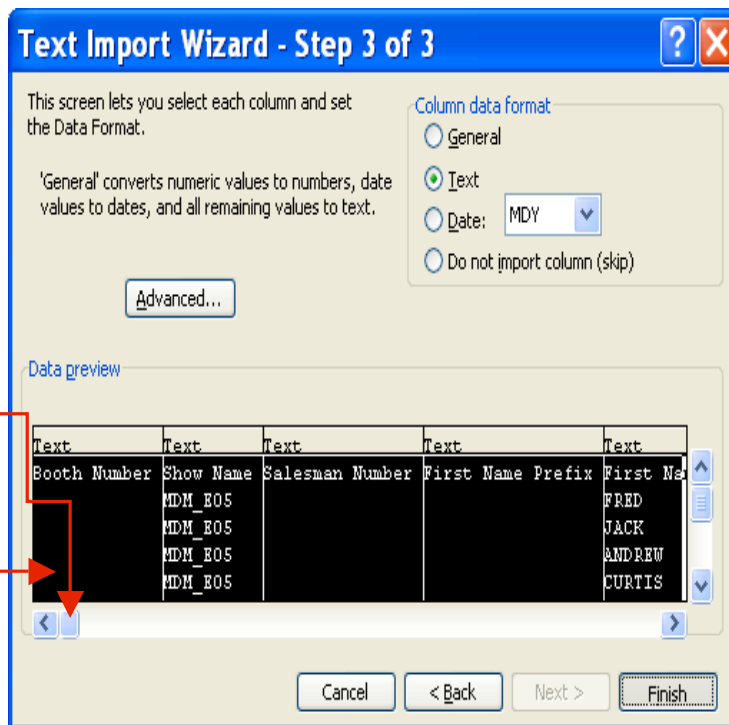
Delete the unwanted data and blank fields which will not be included in your merged document, such as qualifiers, phone, fax etc
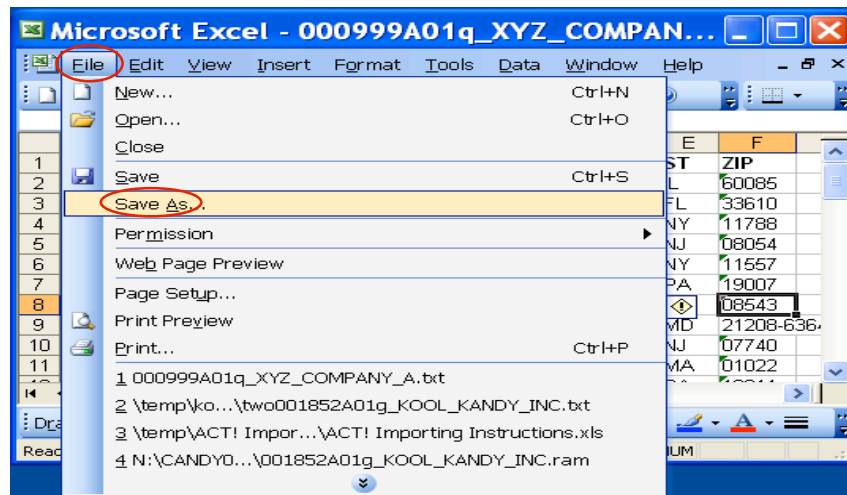
Highlight the column(s)
Click Edit

Click Delete to delete the column(s)
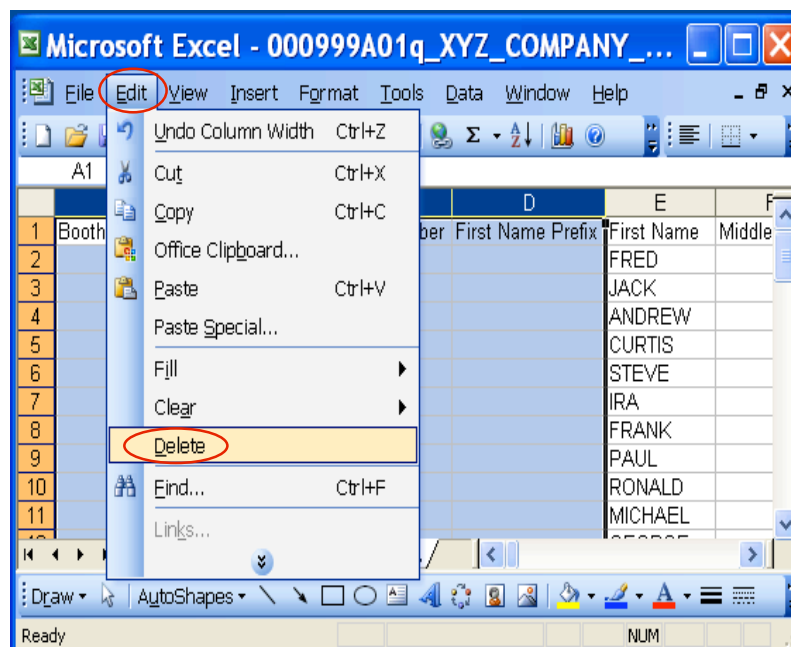
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Click File

Click Save As…

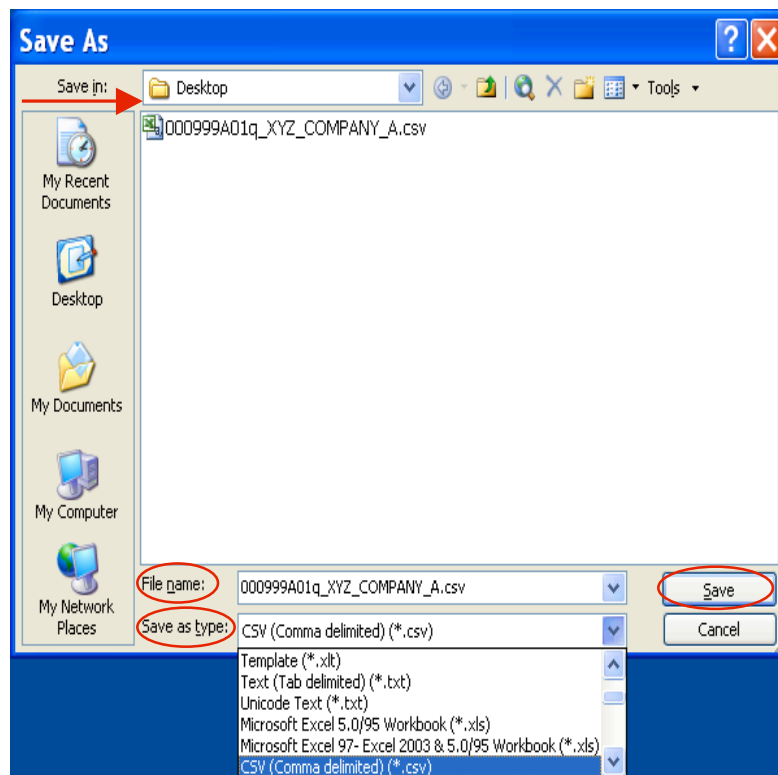Click in Save in: field
and locate the folder
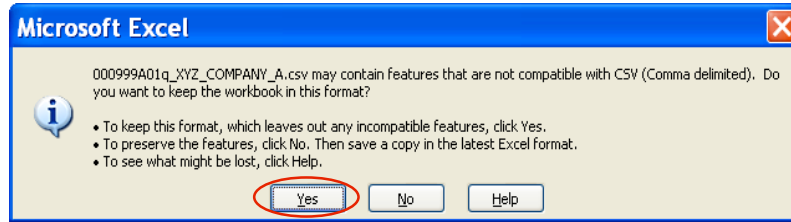where you want to
save your .txt file.

Type File name:
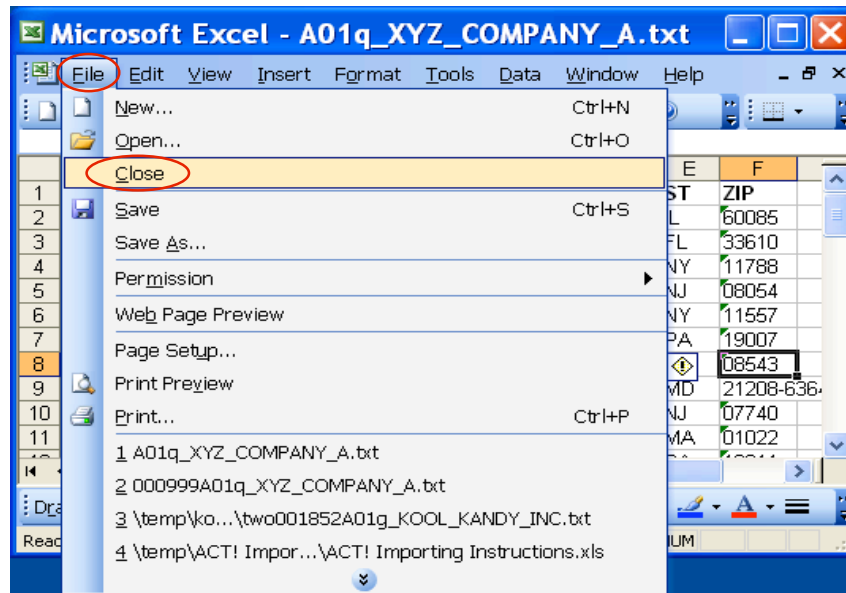
Save as type: "CSV
(Comma delimited)
(*.csv

Click Save

Microsoft Excel

000999A01q_XYZ_COMPANY_A.csv may contain features that are not compatible with CSV (Comma delimited). Do you want to keep the workbook in this format?

- To keep this format, which leaves out any incompatible features, click Yes.
- To preserve the features, click No. Then save a copy in the latest Excel format.
- To see what might be lost, click Help.

[Yes]   [No]   [Help]

Click "Yes"

Click File

Click Close

Microsoft Excel - A01q_XYZ_COMPANY_A.txt

File | Edit | View | Insert | Format | Tools | Data | Window | Help

- New... — Ctrl+N
- Open... — Ctrl+O
- Close
- Save — Ctrl+S
- Save As...
- Permission ▶
- Web Page Preview
- Page Setup...
- Print Preview
- Print... — Ctrl+P
- 1 A01q_XYZ_COMPANY_A.txt
- 2 000999A01q_XYZ_COMPANY_A.txt
- 3 \temp\ko...\two001852A01g_KOOL_KANDY_INC.txt
- 4 \temp\ACT! Impor...\ACT! Importing Instructions.xls

	E	F
	ST	ZIP
1		
2	L	60085
3	FL	33610
4	NY	11788
5	NJ	08054
6	NY	11557
7	PA	19007
8		08543
9	MD	21208-6364
10	NJ	07740
11	MA	01022

Click "No"

Microsoft Excel - 000999A01q_XYZ_COMPAN...

File | Edit | View | Insert | Format | Tools | Data | Window | Help

A1 — fx Booth Number

Microsoft Excel

Do you want to save the changes you made to '000999A01q_XYZ_COMPANY_A.csv'?

[Yes]   [No]   [Cancel]

	E	F	G	H	I	J	K	L
8	FRANK			LINDSAY		SENIOR M	CHURCH & DWI
9	PAUL			HOLLINGER		SALES CC	RBL INDUSTRIE
10	RONALD			EBERHARDT		PRESIDEN	E. L. BAXTER C
11	MICHAEL			FLEMING			IRON DUCK

000999A01q_XYZ_COMPANY_A

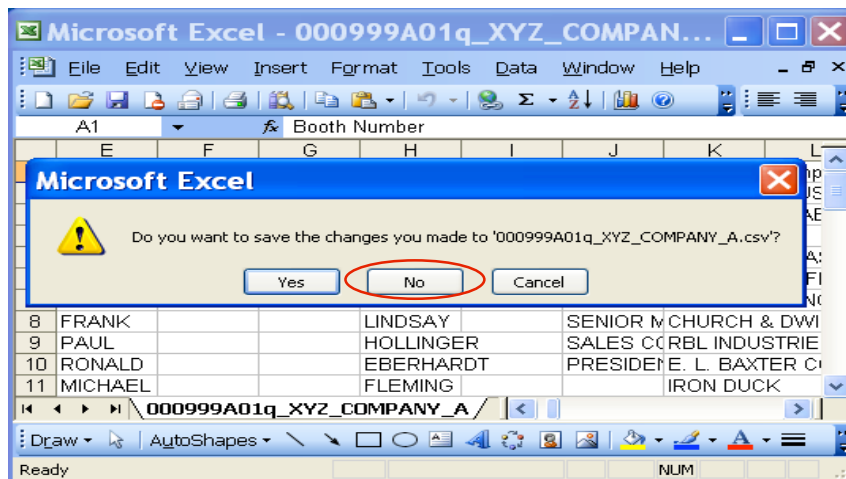**You Are Done!**

If you need assistance importing your sales lead data into your third party software, please contact a technical support specialist at 708-786-5565.

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