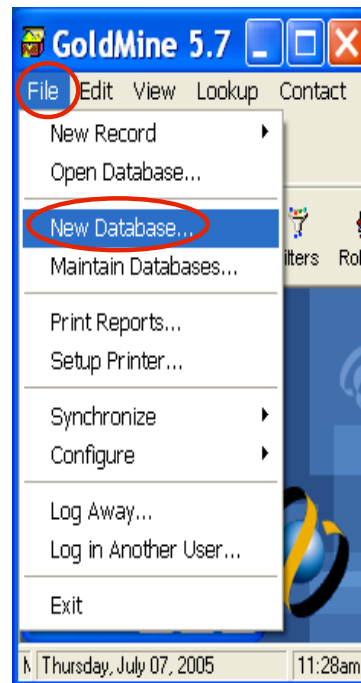# CompuLEAD Data Import Instructions: Goldmine

PLEASE NOTE: Before beginning your Data Import into GoldMine that while your CompuLEAD unit can support up to 99 qualifiers, your GoldMine database <u>CAN NOT</u>. Because GoldMine has a field limitation, you will first need to import your file into Microsoft Excel and then delete any columns containing no data.

To import Goldmine your data must be in Excel .csv format.
<u>Click here to convert to .csv</u>

Open GoldMine

Click File

Click New Database

Enter the description of the new file

Click dBase database files

Click Next >

Create GoldMine Database

Welcome to the Databases Wizard!

This wizard allows you to easily create new GoldMine databases or scale existing databases to other SQL servers.

Please enter the description of the new file:

Sales Contact

GoldMine can store its data on a variety of databases, from Client/Server SQL databases to standard dBASE files. Please select the type of database to create:

○ Microsoft SQL Server database

● dBASE database files

< Back   Next >   Cancel
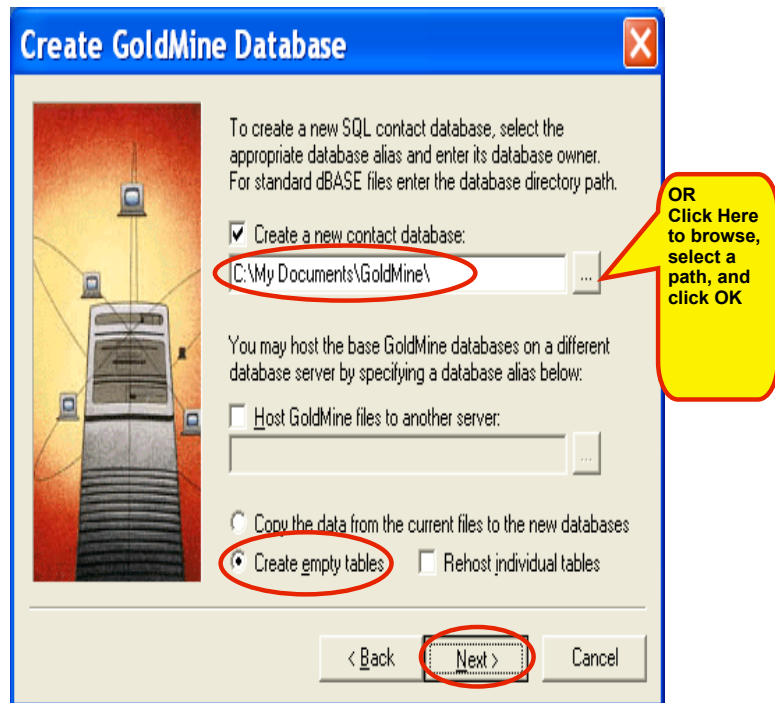

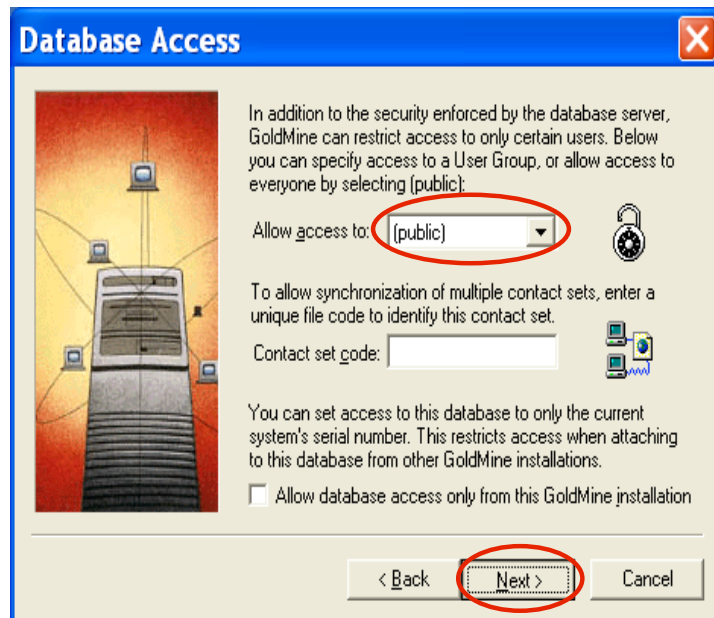Enter a path for your new database in the Create a new contact database field (ex. C:\My Documents\GoldMine\)
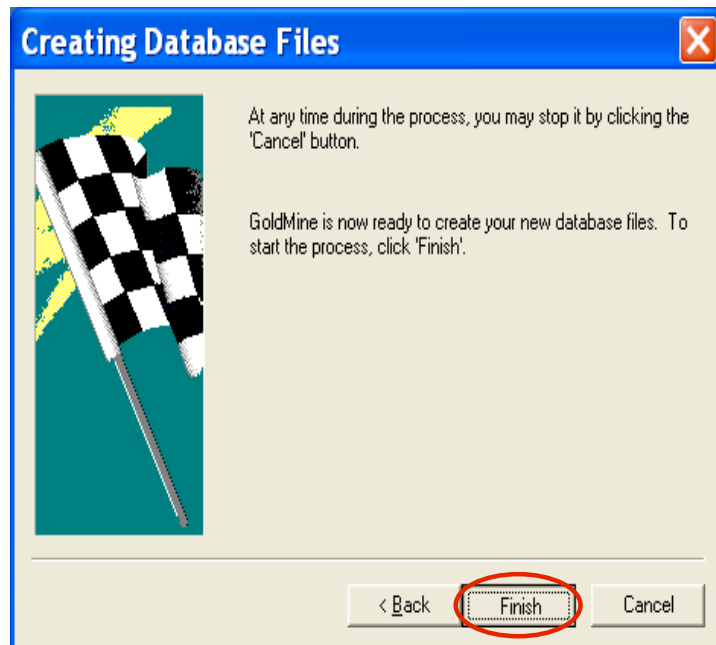
Click Create empty tables

Click Next >

Create GoldMine Database

To create a new SQL contact database, select the appropriate database alias and enter its database owner. For standard dBASE files enter the database directory path.

☑ Create a new contact database:

C:\My Documents\GoldMine\

OR
Click Here to browse, select a path, and click OK

You may host the base GoldMine databases on a different database server by specifying a database alias below:

☐ Host GoldMine files to another server:

○ Copy the data from the current files to the new databases
● Create empty tables   ☐ Rehost individual tables

< Back   Next >   Cancel

Set Allow access to: (if any)

Click Next >

Click Finish

You have now created new database files

Creating Database Files

At any time during the process, you may stop it by clicking the 'Cancel' button.

Data set: My Database
Source: c:\my documents\goldmine\
Destination: C:\My Documents\GoldMine\

File: Contsupp
Index:

Creating table

Total tables: 5 of 7

< Back   Finish   Cancel
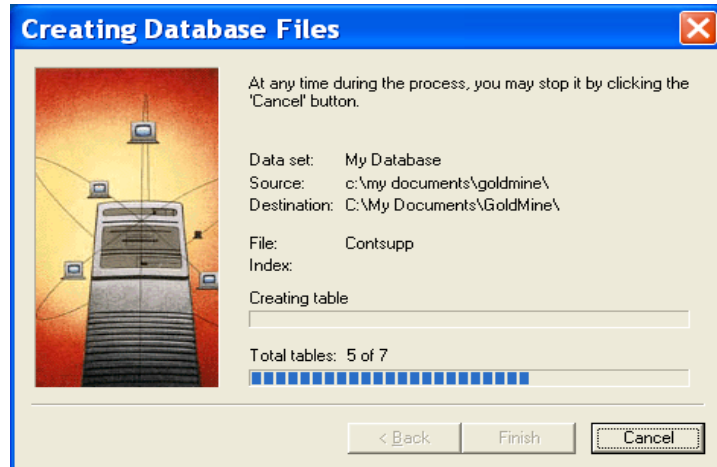
Click File

Click Open Database…

GoldMine 5.7

File Edit View Lookup Contact Schedule Complete Tools

New Record
Open Database…
New Database…
Maintain Databases…

Print Reports…
Setup Printer…

Synchronize
Configure

Log Away…
Log in Another User…

Exit

GoldMine 5.7

Open another contact set | Num | Manjuc | Wednesday, August 17, 2005 | 3:14pm

ilters Rolodex Info Scripts Write Rep
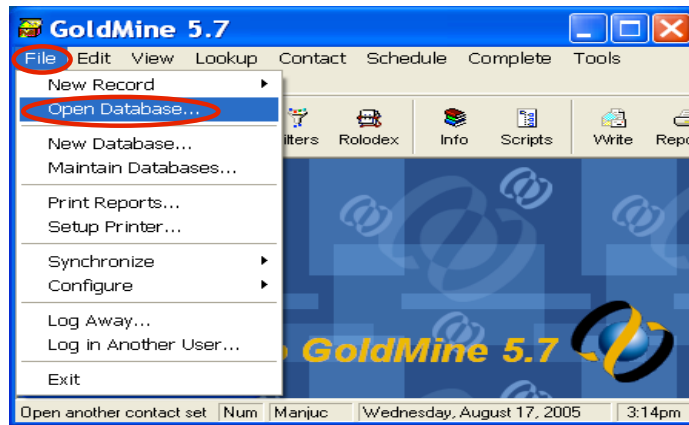
Select the database the you have just created

Contact Set Databases

Description	Access	Database/Location
another sample dbase	MANJUC	dBASE: c:\documents and settings\all users
Common Contact Set	(public)	dBASE: C:\Documents and Settings\All Use
Demo File	(public)	dBASE: c:\documents and settings\all users
Error Messages	(public)	dBASE: c:\gmerrors\
Sales Contact	(public)	dBASE: c:\my documents\goldmine\
Sample Test Database	MANJUC	dBASE: c:\temp\
sContact	MANJUC	dBASE: c:\temp\goldmine\scontact\
import new dbase	(public)	dBASE: c:\temp\import new gmdbase\
TestNDBase	(public)	dBASE: c:\temp\import testndbase\
testssedbase	(public)	dBASE: c:\temp\test\ssetech\

New   Attach   Delete   Properties   Open File   Close

Click Open File

Click Tools

Click Import/Export Wizard
Click Import Contact Records…
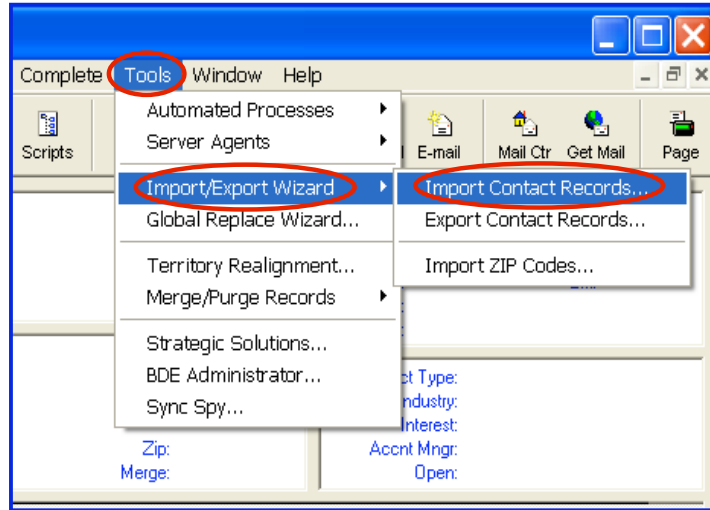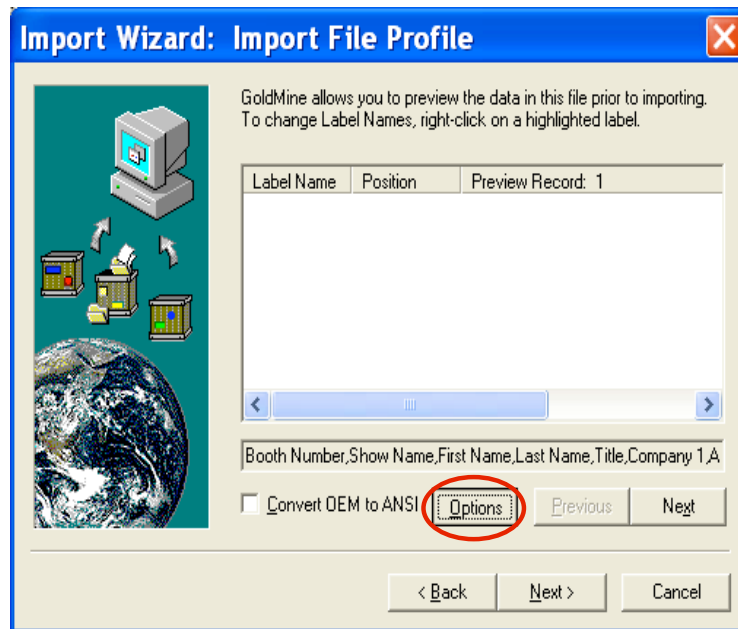

Click Import a new file

Click ASCII file:

Click Next >

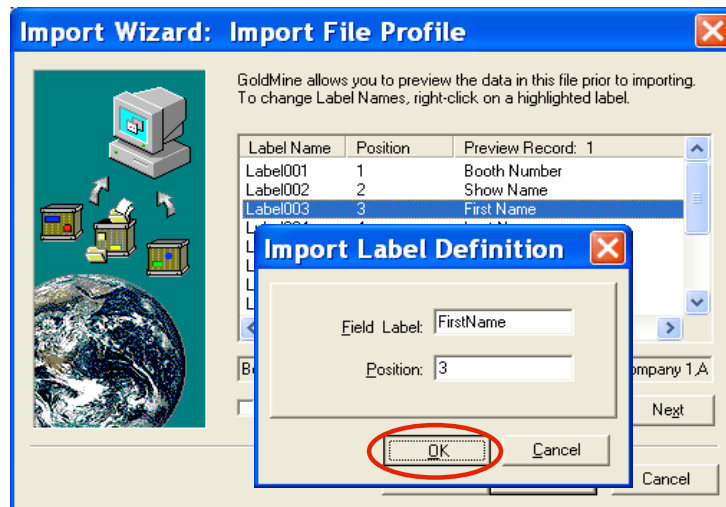Enter the full path and filename of the file to be imported
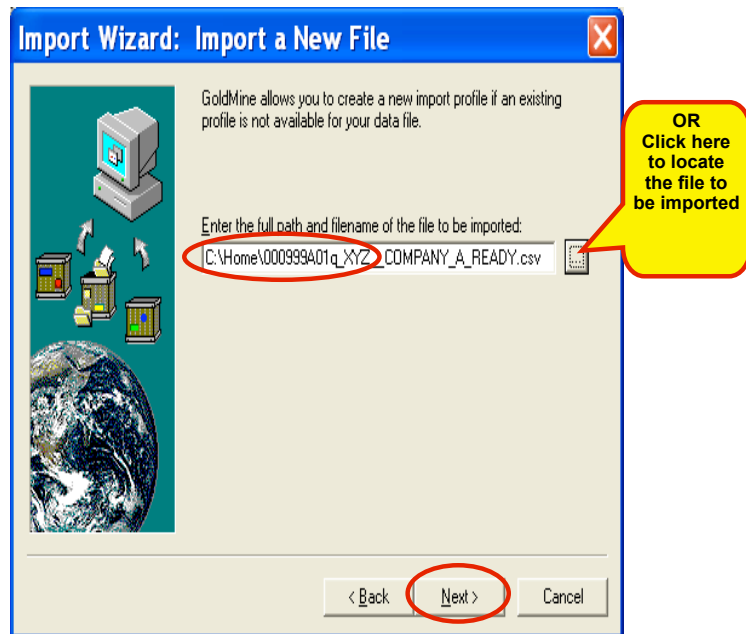
Click Next >

Click on Options

Remove Field Delimiter: Double Quotes

Click OK
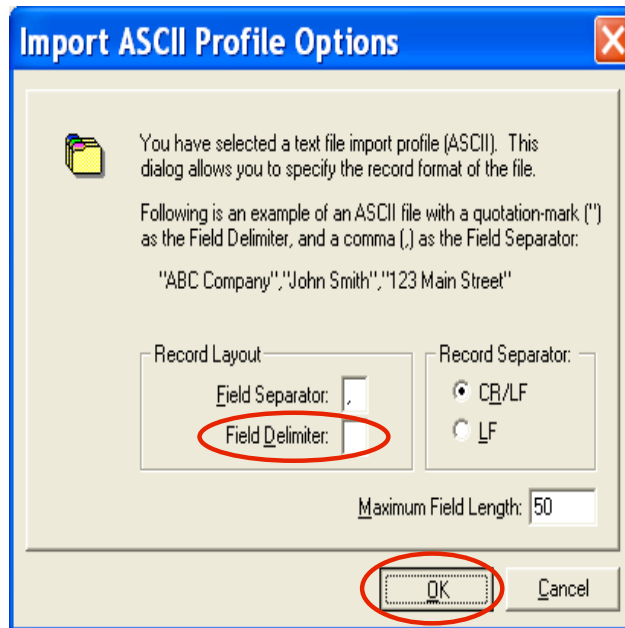
Double-click on the label and rename to the corresponding fields

Click OK

Your data should look
like this

When finished naming
the labels
Click Next >

Map all fields from Import Field to
GoldMine Field

To combine the first and
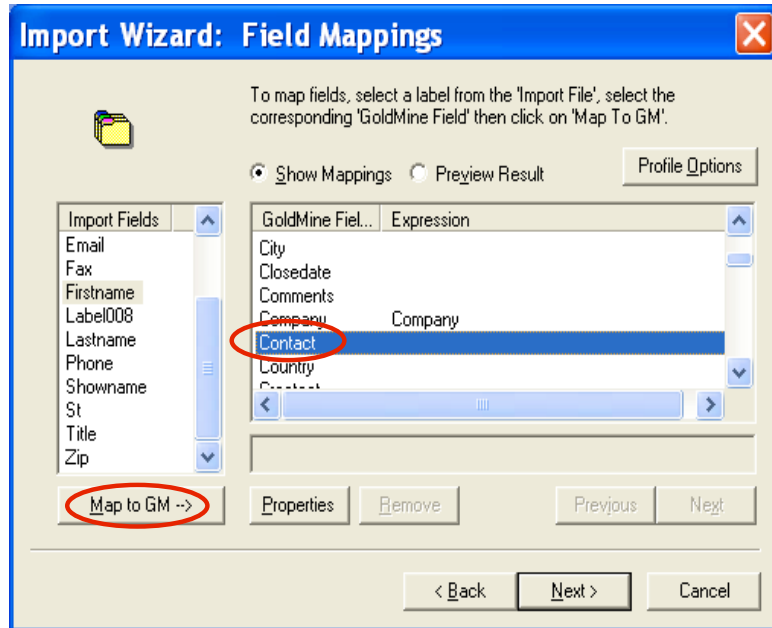last name please follow
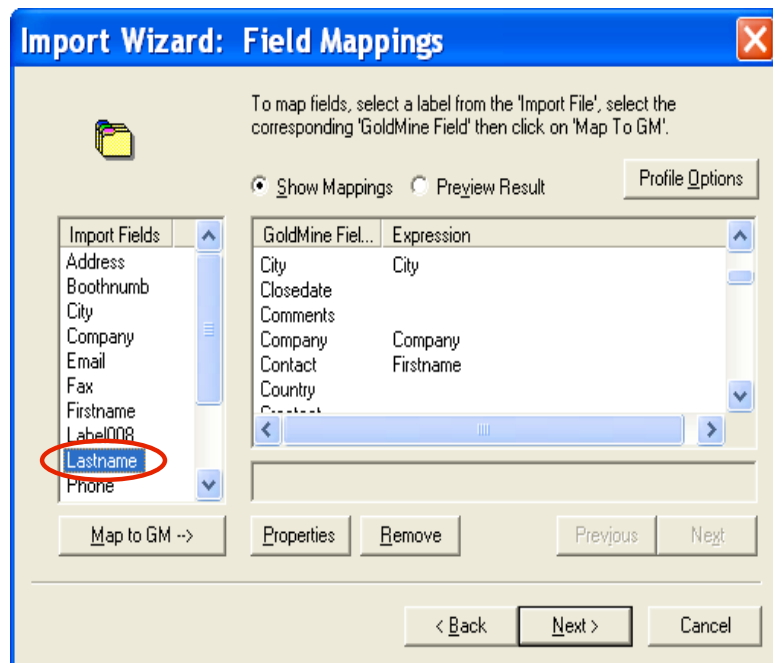the instructions below

1. Click Firstname

2. Click on Contact

3. Click Map to GM ‑>

4. Click Lastname

5. Click Contact

6. Hold down Ctrl Key

7. Click Map to GM ̵→

This is done to combine
firstname & lastname
together

When finished naming
the fields
Click Next >
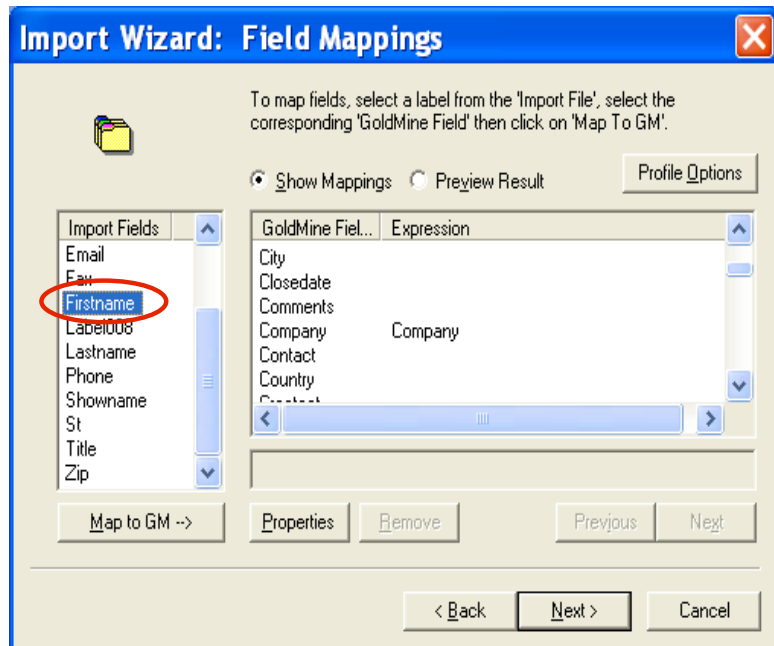
CompuSystems, Inc.
2805 S. 25th Avenue
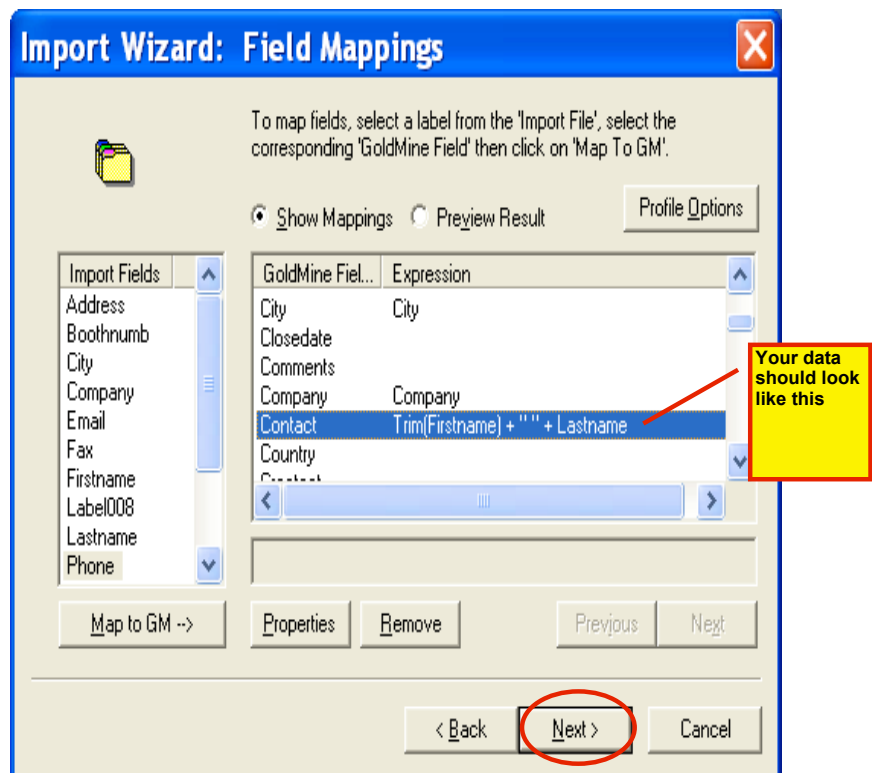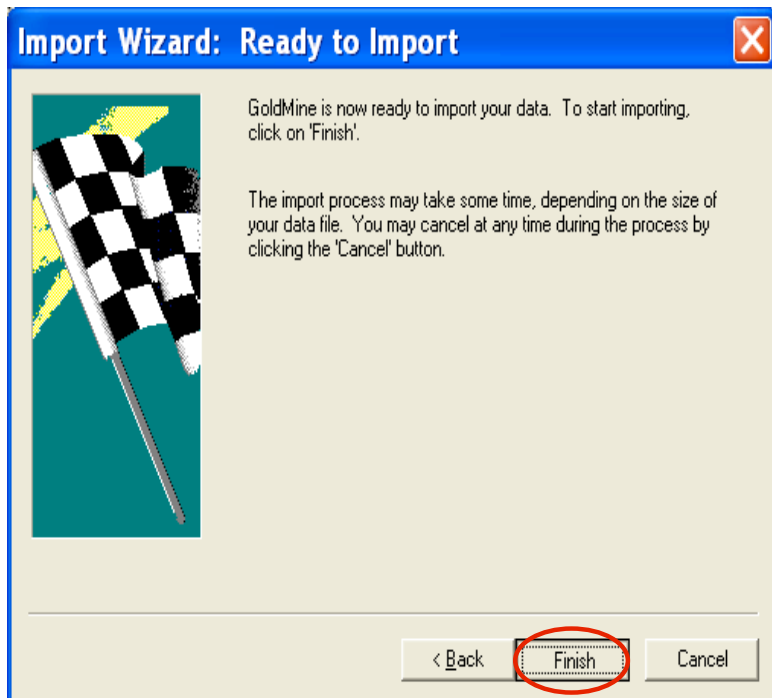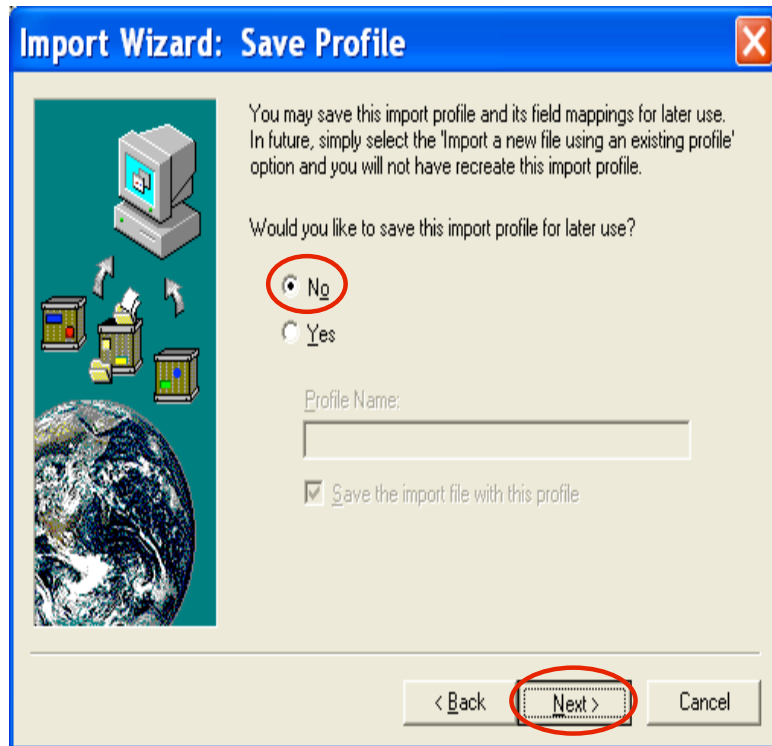Broadview, IL 60155
708.786.5565

Select "No" or "Yes" to
save the import profile
for later use

If your are not sure then
select "No"

Import Wizard: Save Profile

You may save this import profile and its field mappings for later use.
In future, simply select the 'Import a new file using an existing profile'
option and you will not have recreate this import profile.

Would you like to save this import profile for later use?

( ) No

( ) Yes

Profile Name:

☑ Save the import file with this profile

Click Next >

< Back   Next >   Cancel

Import Wizard: Ready to Import

GoldMine is now ready to import your data. To start importing,
click on 'Finish'.

The import process may take some time, depending on the size of
your data file. You may cancel at any time during the process by
clicking the 'Cancel' button.

Click Finish

< Back   Finish   Cancel

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.