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





Click dBase database files

Enter the description of the new

Click Next >

file



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 >

Database Acces	s 🛛 🗙
	In addition to the security enforced by the database server, GoldMine can restrict access to only certain users. Below you can specify access to a User Group, or allow access to everyone by selecting (public): Allow access to: (public) To allow synchronization of multiple contact sets, enter a unique file code to identify this contact set. Contact set <u>code</u> : You can set access to this database to only the current system's serial number. This restricts access when attaching to this database from other GoldMine installations.
	< <u>B</u> ack <u>Next</u> Cancel

Set Allow access to: (if any)

Click Next >

Creating Databa	Ase Files At any time during the process, you may stop it by clicking the 'Cancel' button.
	GoldMine is now ready to create your new database files. To start the process, click 'Finish'.
	< Back Finish Cancel

Click Finish



You have now created new database files

Click File

Click Open Database...

🗃 GoldMine 5.7	
File Edit View Lookup	Contact Schedule Complete Tools
New Record	1
Open Database	🤫 🚓 📚 🖬 🖓 d
New Database	ilters Rolodex Info Scripts Write Repo
Maintain Databases	
Print Reports	
Setup Printer	
Configure	
Log Away	
Log in Another User	GoldMine 5.7 S
Exit	
Open another contact set Num	Manjuc Wednesday, August 17, 2005 3:14pm

🖴 Contact Set Datab	ases		×
Description another sample dbase Common Contact Set Demo File Error Monages Sales Contact Sample Test Database sContact import new dbase TestNDBase testssedbase	Access MANJUC (public) (public) (public) (public) (public) (public) (public) (public)	Database/Location dBASE: c:\documents and settings\all users dBASE: C:\Documents and Settings\all users dBASE: c:\documents and settings\all users dBASE: c:\documents\goldmine\ dBASE: c:\temp\ dBASE: c:\temp\goldmine\scontact\ dBASE: c:\temp\import new gmdbase\ dBASE: c:\temp\import testndbase\ dBASE: c:\temp\import setsndbase\ dBASE: c:\temp\test\ssetech\	
New Attach Dr	elete <u>P</u> rop	erties 🏠 🙆 Copen File Close	•

Click Open File

just created

Select the database the you have

Click Tools

Click Import/Export Wizard Click Import Contact Records...





Click Import a new file

Click ASCII file:

Click Next >



Import Wizard:	Import File Profile	×
	GoldMine allows you to preview the data in this file prior to importing. To change Label Names, right-click on a highlighted label.	
	Label Name Position Preview Record: 1	
	Booth Number, Show Name, First Name, Last Name, Title, Company 1,	4
	Convert DEM to ANSI Convert DEM to ANSI Convert Cancel	

Click on Options

You have selected a text file import profile (ASCII). This dialog allows you to specify the record format of the file. Following is an example of an ASCII file with a quotation-mark (") as the Field Delimiter, and a comma (.) as the Field Separator: "ABC Company", "John Smith", "123 Main Street" Record Layout Record Separator: Field Separator: © CB/LF Field Delimiter: © LF Maximum Field Length: 50

Remove Field Delimiter: Double Quotes

Click OK

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

Click OK



Import Wizard:	Import F	ile Profil	e	X
	GoldMine allow To change Lab	s you to preview el Names, right-o	the data in this file prior I slick on a highlighted lab	to importing. el.
	Label Name	Position	Preview Record: 1	~
	Firstname	3	First Name	
	Lastname	4	Last Name	
	Title	5	Title	=
	Company	6	Company 1	
	Address	7	Address 1 Number	
	Label008 Email	ð Q	Address Z	
A AND	City	10	City	~
CLOCK!	<			>
	Booth Number	Show Name Firs	et Name Last Name Title	Company 1 A
	je ookin rikameer,	onom realito, ne	, riano, zastriano, ria,	company 174
	Convert OE	M to ANSI	ptions <u>P</u> revious	Ne <u>x</u> t
		< <u>B</u> ac	k Next>	Cancel

Your data should look like this

the labels Click Next >

When finished naming

Map all fields from Import Field to GoldMine Field

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

1. Click Firstname

Import Wizard:	Field Mappings
	To map fields, select a label from the 'Import File', select the corresponding 'GoldMine Field' then click on 'Map To GM'.
Import Fields Email Eau Firstname Labei008 Lastname Phone Showname	GoldMine Fiel Expression
St Title Zip	
Map to GM>	Previous Negt
	< <u>B</u> ack <u>N</u> ext > Cancel

	Import Wizard:	Field Mappings 🛛 🔀
	ħ	To map fields, select a label from the 'Import File', select the corresponding 'GoldMine Field' then click on 'Map To GM'. Show Mappings Preview Result
2. Click on Contact	Import Fields Email Fax Firstname Label008 Lastname Phone Showname St Title Zip	GoldMine Fiel Expression
3. Click Map to GM \rightarrow	Map to GM>	Properties <u>R</u> emove <u>Prevjous Next</u>

lm	port Wizard:	Field Mapp	ings	X
	6	To map fields, sele corresponding 'Gol Show Mapping	ct a label from the 'Impo dMine Field' then click c s Pre <u>v</u> iew Result	rt File', select the n 'Map To GM'. Profile <u>O</u> ptions
	Import Fields	GoldMine Fiel	Expression	~
	Address Boothnumb City	City Closedate Comments	City	
	Company Email Fax Firstname	Company Contact Country	Company Firstname	
	Label008	<		>
	Phone V			
	Map to GM>	Properties E	Remove	Prevjous Ne <u>x</u> t
			< <u>B</u> ack 1	Next > Cancel

4. Click Lastname

6	Corresponding 'GoldMine Field' then click on 'Map <u>Show Mappings</u> Preview Result	select the To GM'. Profile <u>O</u> ption
Import Fields Address Boothnumb City Company Email Fax Firstname Label008 Lastname Phone	GoldMine Fiel Expression City City Closedate Comments Company Company Contact Firstname Country Contact IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	
Map to GM>	Properties <u>R</u> emove Pre	vjous Ne <u>x</u> t

- 5. Click Contact
- 6. Hold down Ctrl Key
- 7. Click Map to GM \rightarrow

	Import Wizard:	Field Mappings
This is done to combine firstname & lastname together	Import Fields Address Boothnumb City Company Email Fax Firstname Label008 Lastname Phone	To map fields, select a label from the 'Import File', select the corresponding 'GoldMine Field' then click on 'Map To GM'.
When finished naming the fields Click Next >	<u>M</u> ap to GM>	Properties Bernove Previous Next < Back

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 for later use? Would you like to save this import profile for later use? verse Profile Name:
☑ Save the import file with this profile < <u>Back</u> Next > Cancel

Y

Click Next >

Import Wizard:	Ready to Import	X
	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.	
	< <u>B</u> ack Finish Cance	

Click Finish

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.