Import Contact Records Into GoldMine From A CSV File

Preparation: Configuring your PC

Before saving the Excel sheet as a CSV file, you must change the field delimiter character on your machine. By default, Windows sets the field delimiter to be a comma, but seeing as how it is possible that there will be commas in address data, it is not suitable to be used as a field delimiter. Instead I recommend using the pipe character (|), which can be found over the \ key, to the left of the Z key on a standard keyboard. To make this change:

Windows XP:

Click Start >> Settings >> Control Panel >> Regional and Language Settings >> Customize and change the "List Separator" value to the pipe symbol (|).

Windows Vista/Windows 7:

Click Start >> Control Panel >> Region and Language >> Additional Settings and change the "List Separator" value to the pipe symbol (|).

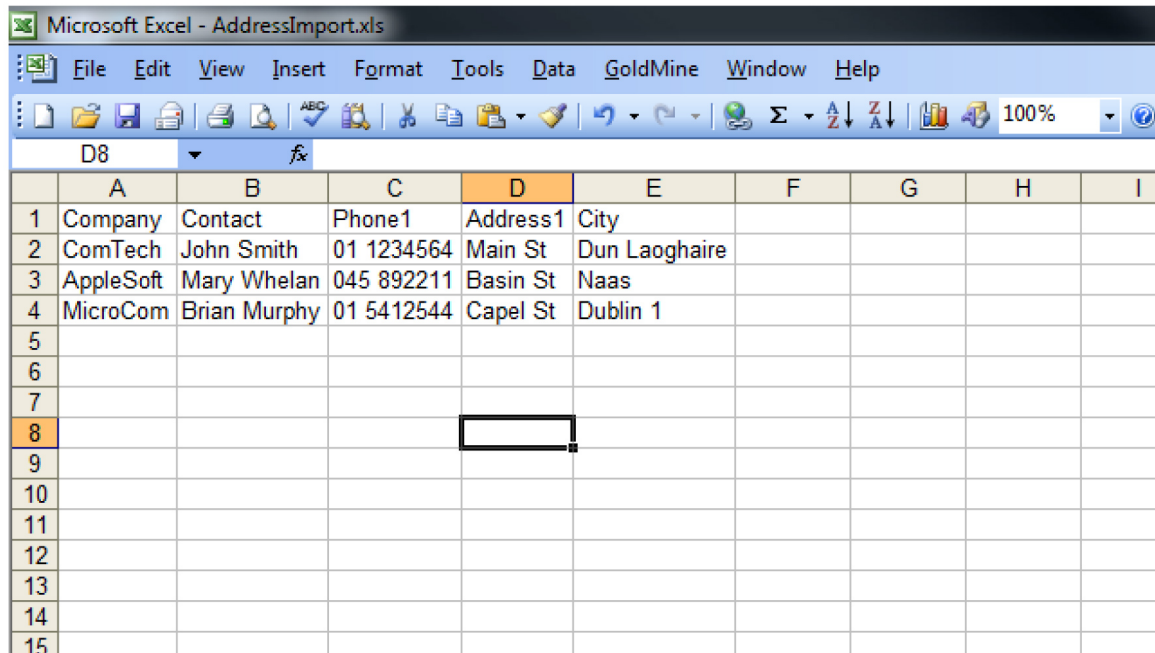## Step 1: Preparing the data in the CSV File.

Note: While all screenshots are taken from Microsoft Excel, all steps are virtually identical in OpenOffice Calc.

1. Open the file using Microsoft Excel or OpenOffice Calc.

2. Ensure that the first row contains headers correctly formatted for import to GoldMine. This means that the headers should not be any longer than 10 characters, should not contain any spaces or any characters other than the letters A-Z and the numbers 0-9. (fig.1)

fig.1

3. Ensure that all columns are fully expanded so that all data is visible. If the data is not visible on the CSV sheet, then GoldMine will truncate it when it is exported. (fig.2)

fig.2

4. When the sheet is prepared, highlight the cell A1 and click File >> Save As. Ensure that the document type is set as CSV (Comma Delimited)(*.csv) file type. Give the file a name and click Save. (fig.3)
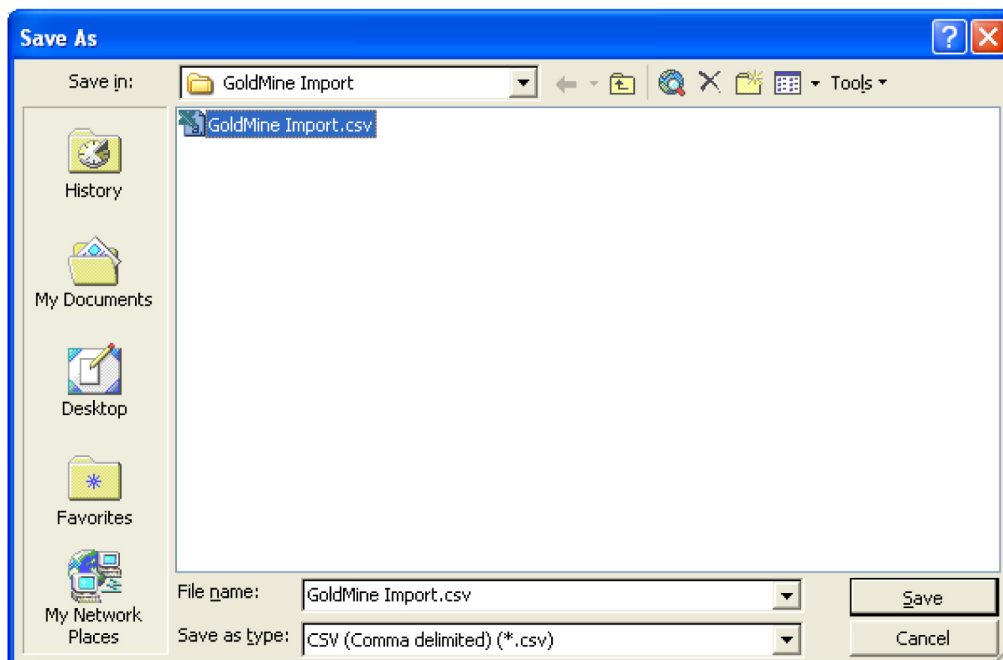

fig.3

Step 2: Importing the contact records into GoldMine.

Note: It is very important that a full backup of the GoldMine system, including all contact set files, is taken before any contact records are imported into GoldMine.

1. Log into GoldMine as a user with Master rights.

2. Click File >> Import and Export >> Import Contact Records. This will bring up the GoldMine Import Wizard. Select 'Import a new file' and 'CSV file' and click Next. (fig.4)
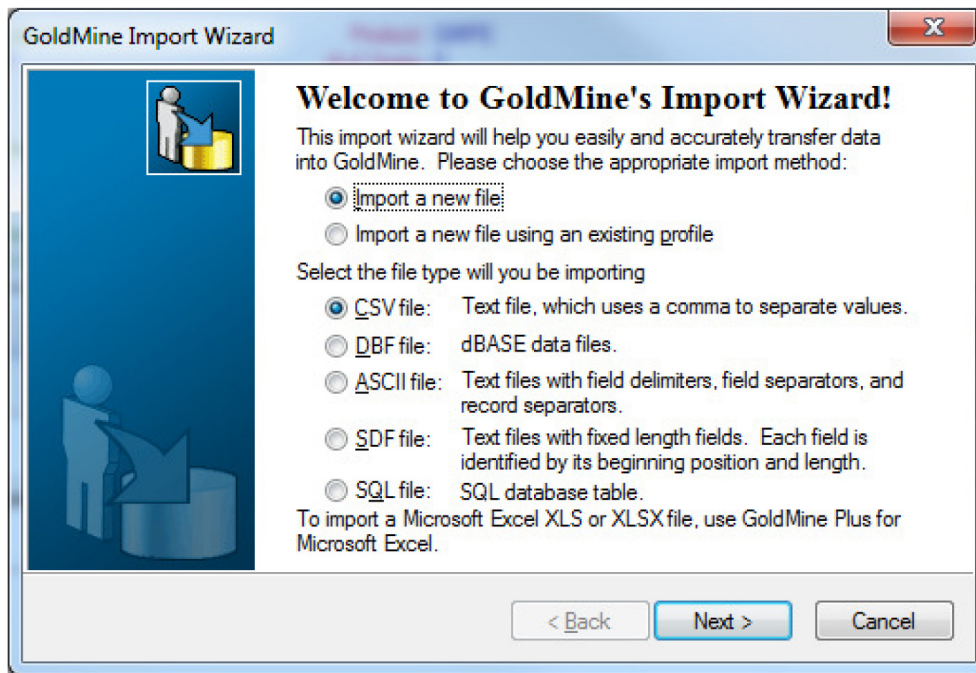

fig.4

3. Click the Browse button and browse to the location where the CSV file has been saved. (fig.5)
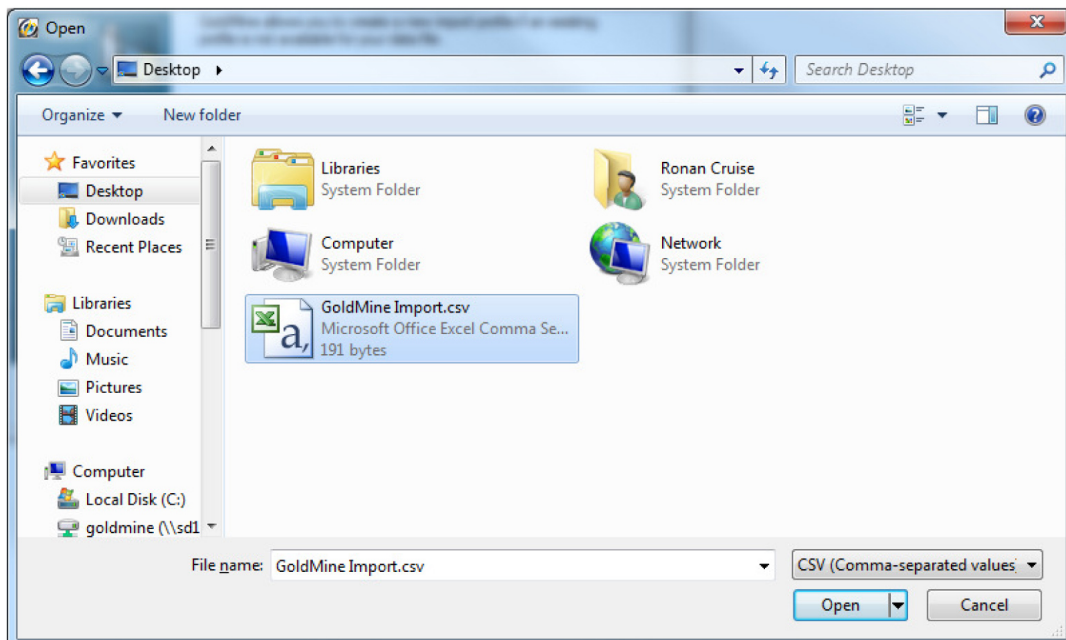

fig.5

4. The next screen shows a preview of the data that is stored in the CSV file. Click Options, remove the " from the Field Delimiter Box, change the Field Seperator box to read the pipe character (|), ensure that the Record Seperator is set to CR/LF, and set the Maximum Field Length to 999. (fig.4). When you click OK the information should show in the preview box. (fig.5).
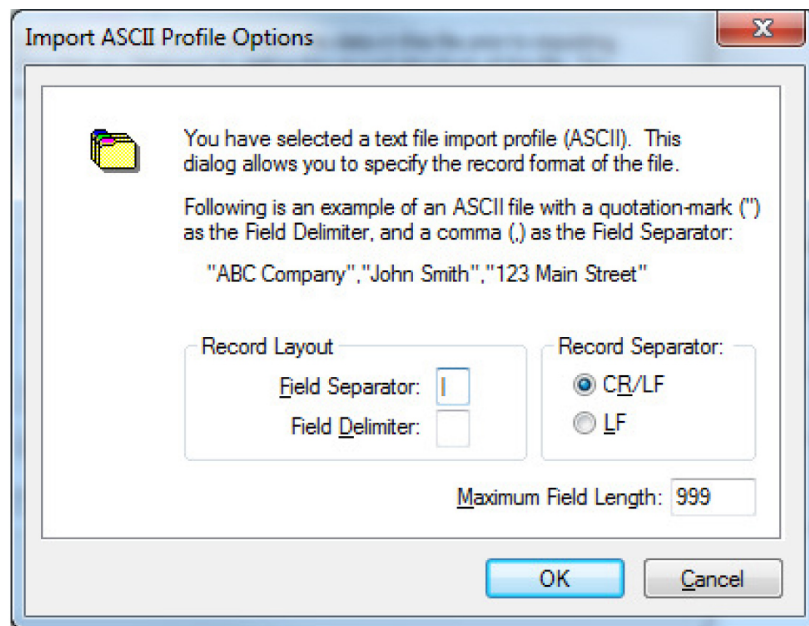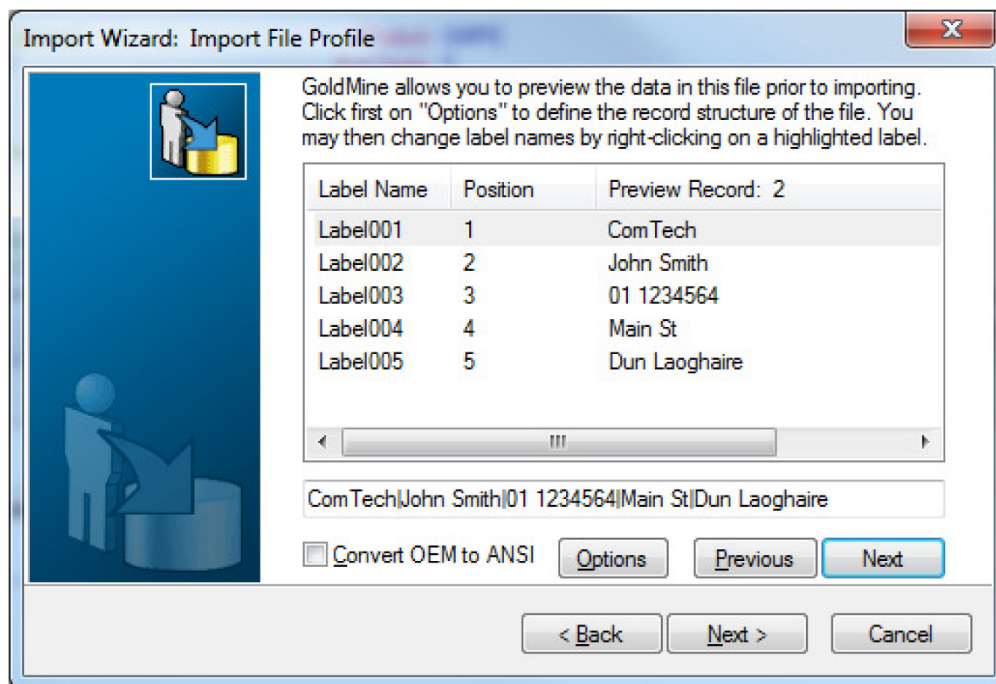
fig.4

fig.5

5. While still on the preview screen, you will notice that the label names currently read Label001, Label002 etc. You will need to change these to the correct header names from the CSV sheet.

   To do this, use the Previous button to scroll back to the first record (the third column header will read 'Preview Record: 1'. This will show the header names in the third column. For each label, double click on the Label Name (Label001, Label002 etc) and enter the corresponding name from the CSV sheet. (fig.6). When you have done this for each header, the Label Name and the Preview records columns for each row of Preview Record 1 should match. (fig.7). Click Next when all Labels have been renamed.
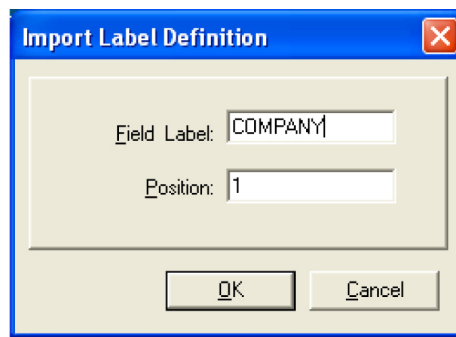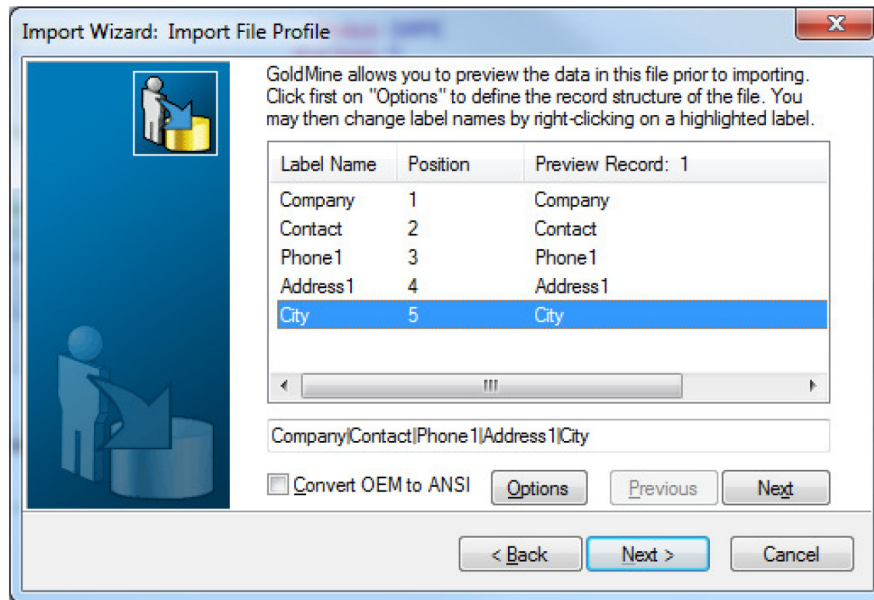
fig.6

fig.7

6. The next screen allows you to map the fields in the CSV file to the corresponding fields in GoldMine. To map a field, click on the field on the left hand side and then click on the corresponding field on the right hand side and click Map To GM -->. Repeat for all fields in the CSV file. (fig.8). Click Next.
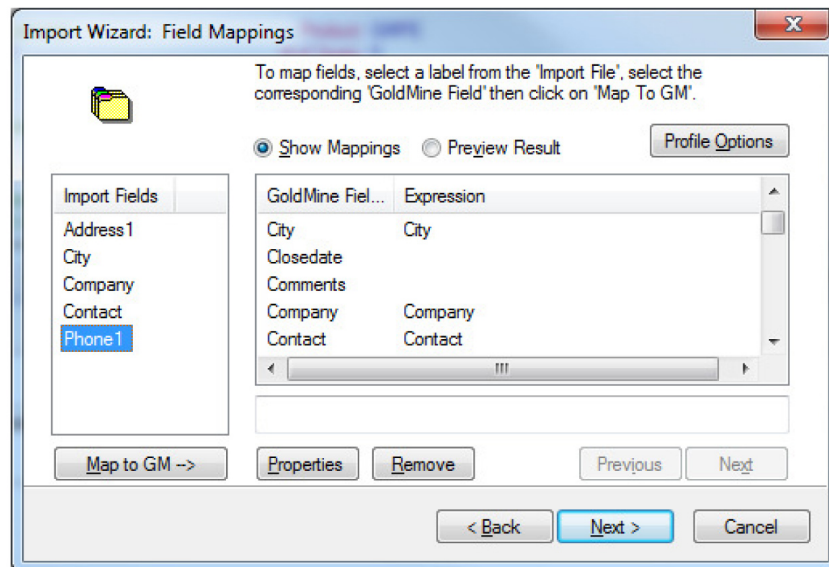

fig.8

Note: You do not have to map all fields from the CSV file to fields in GoldMine. If there are fields in the CSV file that you do not wish to import, simply do not map them to a GoldMine field, and they will be ignored during the import.

7. It is possible to tag the records that are being imported so that they can be easily identified once imported. To do this, on the screen where you match the fields in the CSV field to the corresponding GoldMine field, scroll down through the list of GoldMine fields on the right hand side and select a field that is not being used for the import, say for example the source field or the merge field. Highlight the field in the list of GoldMine fields and click Properties. Enter the tag you wish to use in inverted commas, say the date of the import. (fig.9) Click OK.

Once the files have been imported into GoldMine, you can use this tag to build a filter to identify them.
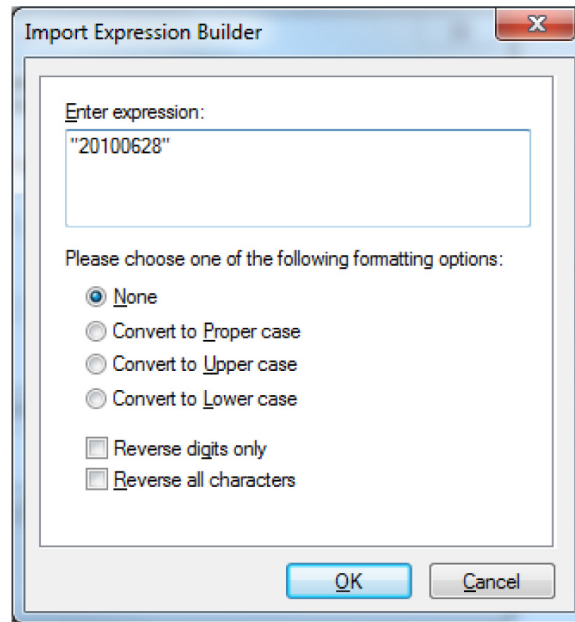

fig.9

8. If you wish to use the same settings for a future import, select Yes and enter a profile Name, otherwise select No. (fig.10). Click Next and then Finish to begin the import process.
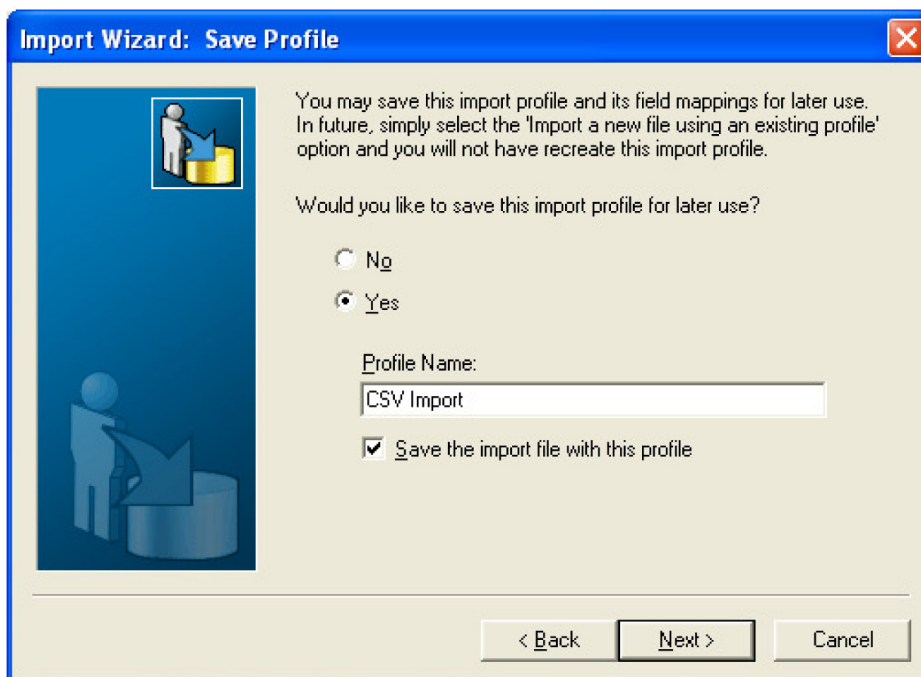

fig.10