

Project Database Co

Developer of
ExhibitOffice + ManagEvent

Importing Data into the Database

To import existing Contact data into the database, you need to download the archive that contains the Excel Workbooks you will need to import contact and time slip data into the database.

Download it from the download page in the manual
<http://www.projectdatabasecompany.biz/downloadsproject.html>

What you want to do is:

1. Export your existing data out of your current application (comma delimited format is best).
2. Open this data with Excel.
3. Copy complete columns of data from your export file (i.e. the entire first name column) and paste them into our columns on our work book. Basically you are aligning your data for the import into the database.
4. Save the new Adatabase workbook.

The difference between the Full and Simple Contact imports, is that the Simple only allows you to import 2 addresses, not specify the tab labels (they will be labeled by your Preferences) and no comments. The Full import allows you to import all 6 address locations, a comments field, and specify the labeling of the tabs regardless of what they are in Preferences.

A couple of key things to watch out for in this workbook:

*Label the Phone type fields with the types of phone numbers you will be loading. These should correspond to the phone number types defined in the database, which include: Phone, Fax, Mobile, Email, URL, Pager.

*Make sure you combine the first and last name into the ContactName field (Chris Lamb).

*Make sure you define what Tab1, Tab2, etc. labels should be, for example Home, Business, etc. This way, when the data is loaded, the Tabs will be labelled according to how you specify.

*Keep in mind that when editing in Excel, you can use the FILL DOWN feature to copy something like "Phone" into every row for the column, thereby speeding up the data entry.

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*Excel will also allow you to find duplicates before loading into the database.

*Remember, if you have multiple addresses for a contact, such as Work and Home, those will be loaded into a single record in the database. They may be separate in your existing file; combine them for loading.

You are now ready to load your data into the database, so here is what I want you to do.

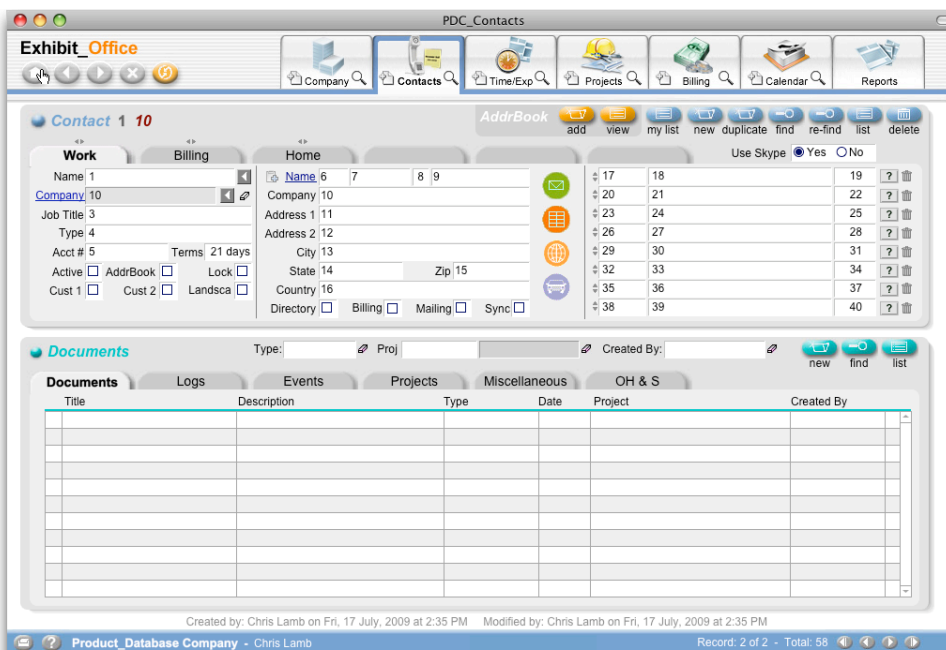
1. Stop the FileMaker Server service (Control Panel: Administrative Tools: Service)
2. Backup (make a copy) of the entire "database" folder on your C:\ drive. This is in case something goes wrong.
3. Restart the FileMaker Server service.
4. Log-in to the database, go to Preferences: Import, and perform a "Full Contact Import"
5. Check the data that came in and make sure that it looks perfect.

If something went wrong, then we will stop the FileMaker Server, replace the "database" files with the backup, restart the FileMaker Server, and work on the workbook to try the load again.

Formula to link 2 fields is
Cell Ref & " " & Cell Ref

This is what you will use to put the name and surname into the one field

Here are the layouts showing the field positions for the data



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Pages 2 & 3 are used if there are multiple address's to import

