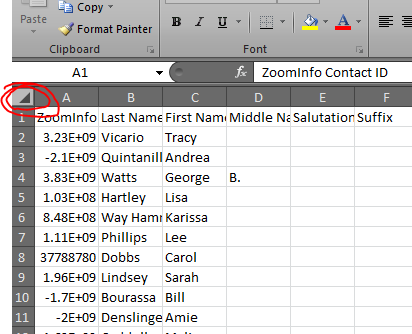
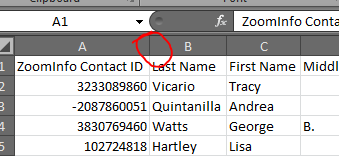
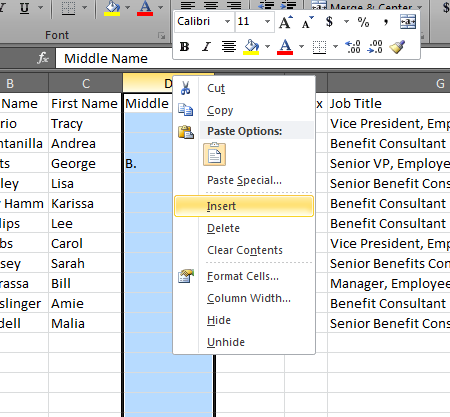
GoldMine importing using the “Banana Tool”

# Preparing the data file

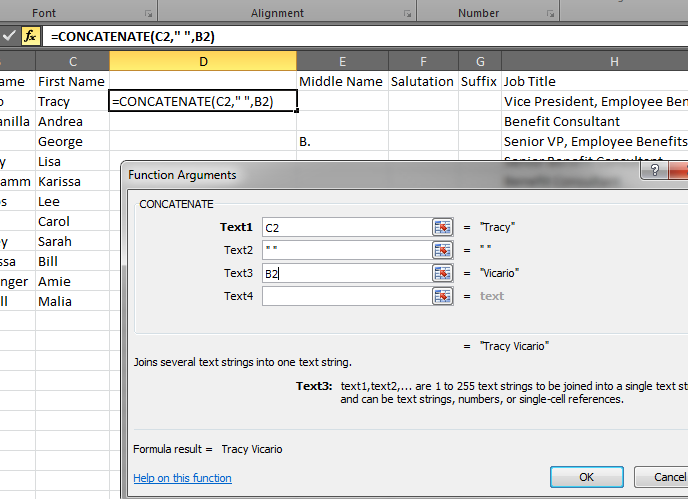
1. Open your CSV, XLS, or XLSX file with Excel
2. Click here in the upper-left to highlight all rows and columns:



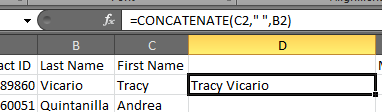
1. Double-click the line between any two columns to auto-width the whole file:  
     
   
2. If your file contains separate fields for first name and last name, you’ll want to do a bit of work on it in Excel before you’ll be able to import it. The two columns can be combined into a new column like so:
   1. Highlight a column (like the D column, middle-name) and right-click on it and select Insert to add a new blank column



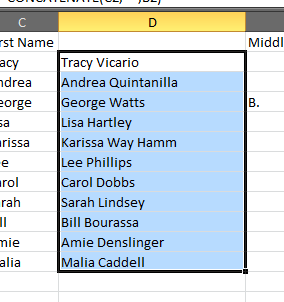
* 1. Place your cursor in cell D:2 and edit the formula for the cell. This can be done any number of ways, the simplest of which would be to type it directly by entering: =CONCATENATE(CS,” “,B2)

  
Whether you use the graphical interface or type it manually, the idea is that we want Excel to put together the first name for that row (cell C2), a blank (denote by “ “), and the last name for that row (cell B2) in our cell.

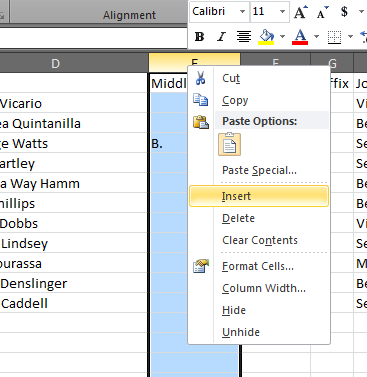
If it looks like this when you hit enter or OK, it’s correct:



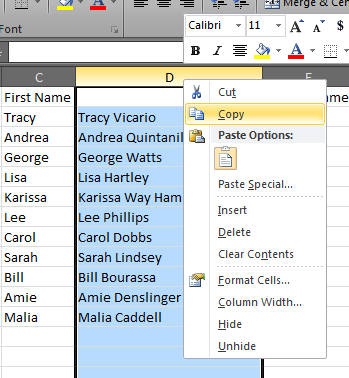
* 1. The next step is to make that happen for the rest of our rows. Instead of laboriously entering the same formula for the rest of your rows, we can simply grab the little black square in the lower-right of our cell (cell D2) and double-click it or drag it down the column. This will cause the rest of the cells in the column to follow the same pattern/formula. If done correctly, you should now see a full name in each of the cells of column D:



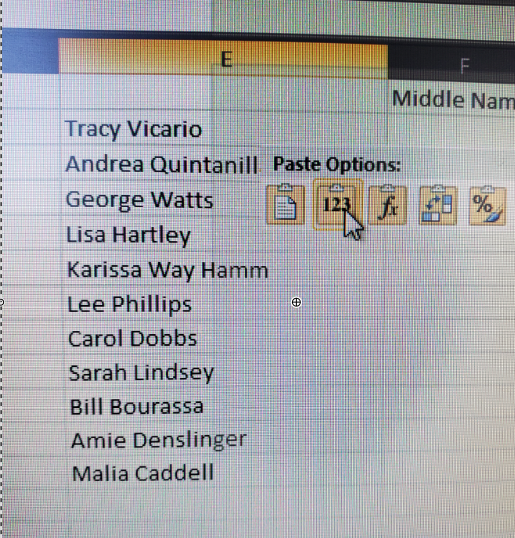
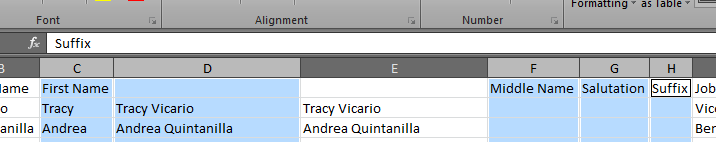
* 1. This column may look good in Excel, but it’s still just a formula. Those cells don’t actually contain our full contact names. For that, we need to create one more column. Again, right-click on column E and select Insert to create a new empty column:

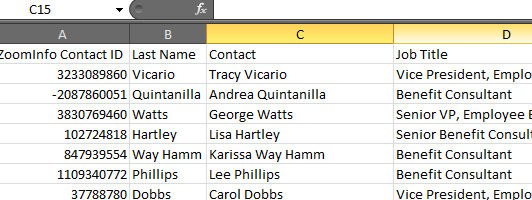


Then select column D and COPY it to the clipboard

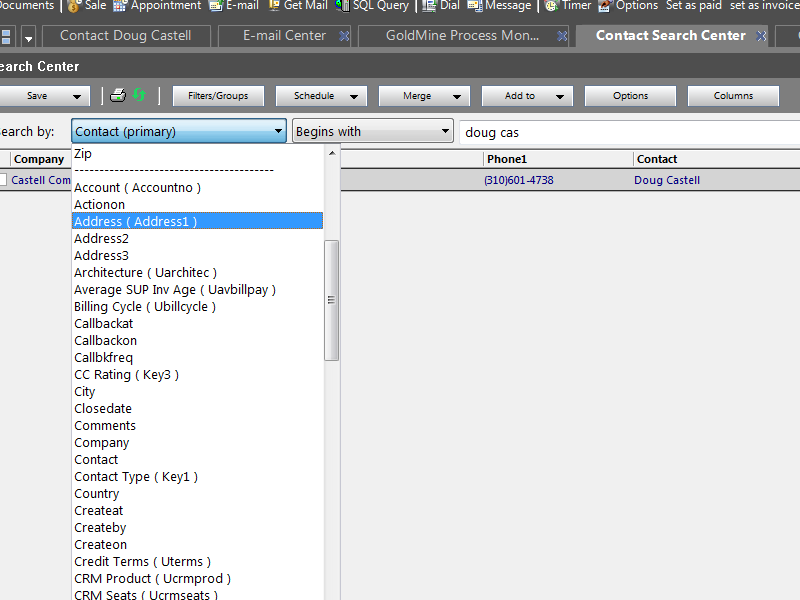


* 1. Finally, right click on the empty column E header and select paste values (123)

  
  
This will result in the actual **values** displayed on screen (not the formula) to be pasted into this new column.  
  
f. We can now rename this column to “CONTACT” and get rid of the unnecessary columns by control-clicking their headings and deleting them:  
  


g. Our file should now look like this:  
  


h. It might be a good idea to further review the columns in the file and try to make their field names match up with GoldMine.   
  
For instance, GoldMine’s main phone number field name is PHONE1, not “Direct Phone Number.” Other fields like “Person Street” or “Person Zip Code” would be more appropriately named “Address1” and “ZIP”. If we take care of renaming these now in the data file, it will make our field mapping easier later.   
  
If you’re unsure what the GoldMine field is named under-the-hood, you can use the GoldMine search center to find out. Just go to the search center in GoldMine and drop the ‘Search By’ field down and you’ll find all the mappable fields in your system listed. If the on-screen field label differs from the under-the-hood name at all, you’ll find the under-the-hood name in parentheses next to it (such as Address (address1) or Credit Terms (uterms) in the screenshot, below)



1. Once you’ve corrected all the field column headers to your liking, save your excel file and close it.

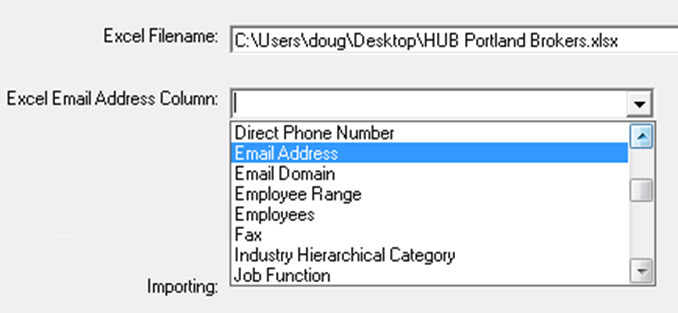
# Importing the Data

1. Run the banana tool and enter your GoldMine password.

A screenshot of a computer

Description automatically generated

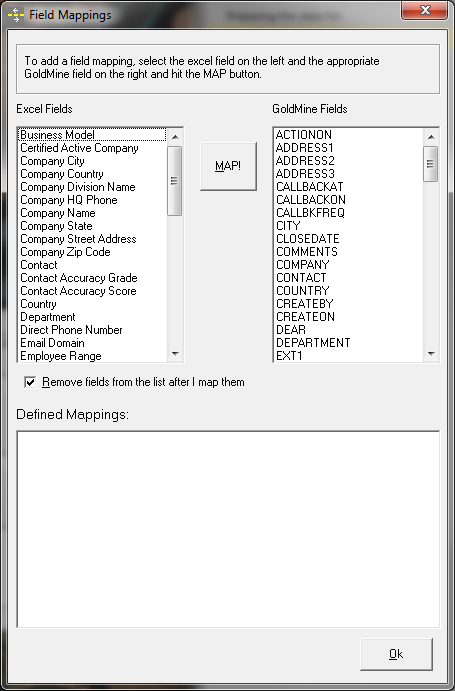
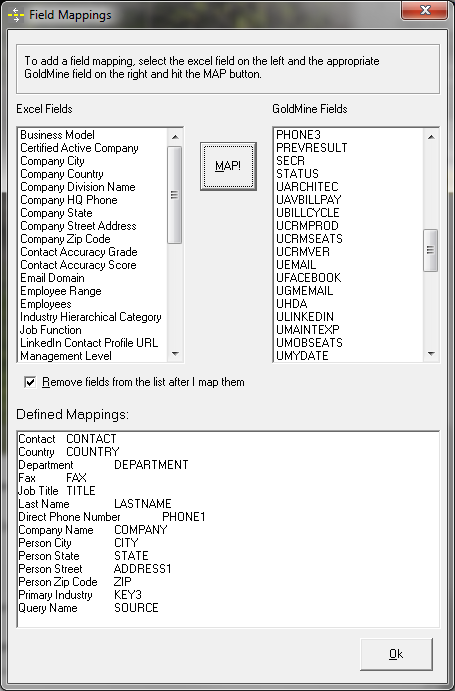
1. Hit the “…” button to browse for your excel file
2. Once your select your file, pull down the list and select your ‘Excel Email Address Column”



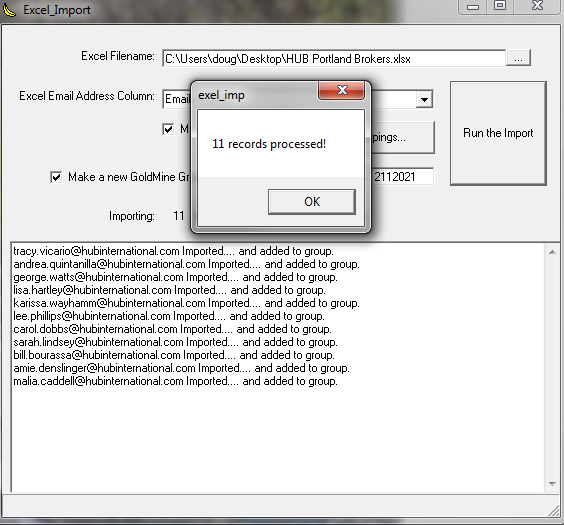
1. If you’d like to update existing records (based on the incoming e-mail address matching), check the “Update Mapped Fields on Match” box.

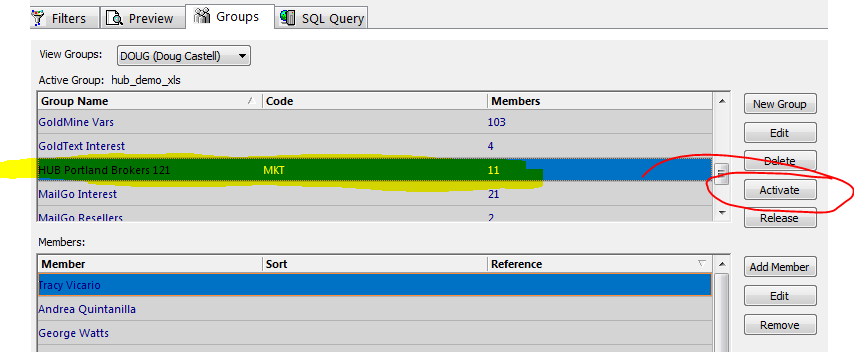
A screenshot of a computer

Description automatically generated  
  
It’s worth pointing out that any mapped fields will be updated on the matched record. That means any number of “bad things” could happen:

1. **Blank** and/or *less-accurate values* in the incoming file might overwrite good data in the fields of your existing record.
2. Primary contact data could be overwritten with data from an e-mail address that matched an **additional contact’s** e-mail address. Example: Bob Smith’s secretary’s e-mail address, SSN, and mailing address are in the incoming file. That same e-mail address is associated with an additional contact of Bob’s. When you match on e-mail address, and have the tool update matched fields, it’s going to update the fields on the **primary** contact (BOB).
3. If your incoming file has **multiple e-mail addresses** that are all associated with a particular contact record (whether primary or additional) and you’re updating mapped fields, that update will happen for each line item. That means that the value that ends up in the field will be the value from the last record the tool handles (*not necessarily* the one you expect.)
4. In short, this can be a powerful feature that opens the door to lots of functionality, BUT, it can yield negative results if not thoroughly considered. I’d suggest using it only in cases where you’d like to match on e-mail address and map (and update) only one or two fields. If you find yourself using this option and mapping plenty of primary fields (like company, contact, phone1, address1, city, state, zip, etc.) please give it some careful thought before hitting the IMPORT button.
5. Hit the “Field Mappings” button and the window where you match up the fields in the Excel file and GoldMine will come up:   
   
6. One-by-one, highlight the fields that you’d like to map and hit the “MAP!” button. Each pair of fields will be added to the “Defined Mappings” list, below:   
     
   \*note: if you accidentally map something and want to remove it, you can select the mapped pair of fields in the “Defined Mappings” box and hit the DELETE key on your keyboard   
     
   Once done mapping all the fields you’d like to import, click OK.
7. If you’d like to create a contact group of the imported records in GoldMine (recommended) you check this option and give your group an easily identifiable/unique name:



1. Double-check everything and hit the “Run the Import” button and you’ll see the log window fill with imported records.   
     
   \*note that any records whose e-mail address was already on file will not be duplicated or overwritten, they’ll simply be added to your group.
2. The first thing to do with your imported records is probably to verify that everything looks good by locating your group and reviewing the records.   
   To do so, go to Tools|Groups



1. Activate your group and you can then scroll through the records and take a look at them, mass-update them with the Global replace tool (tools|data management|global replace), schedule a call for them all, delete them all the try again, etc.
2. PROFIT!