

Exporting ePinPointer data into GoldMine

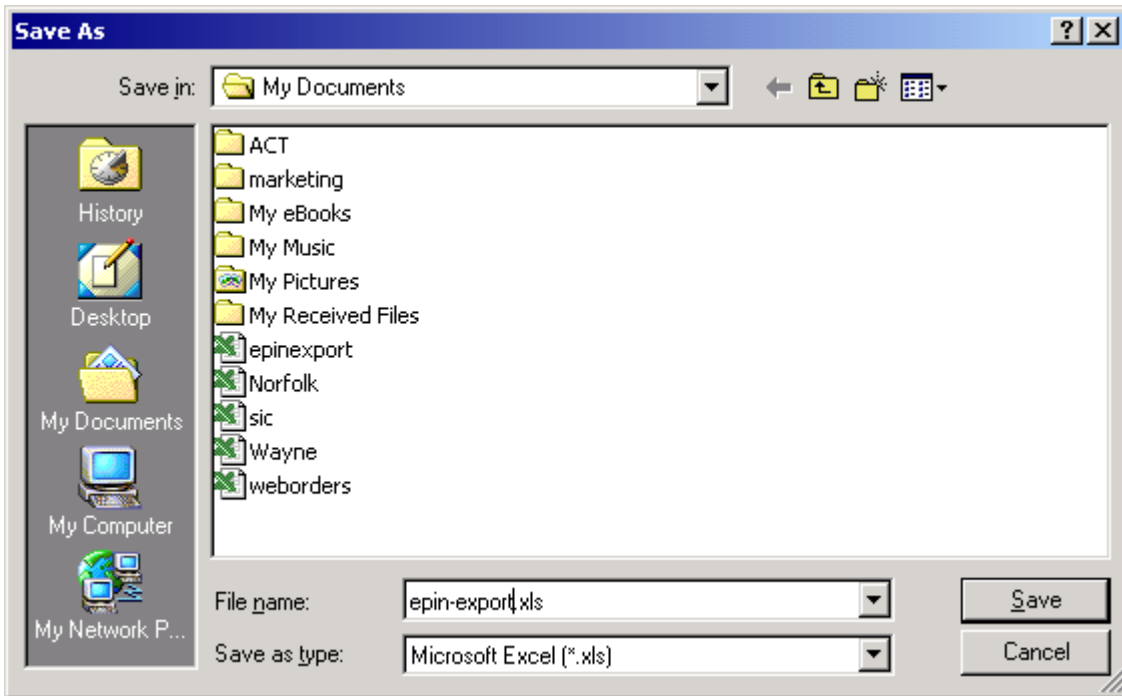
1. Export your ePinPointer data to Excel.

From the Search Criteria Screen click on “Save to Excel”

The screenshot shows the 'ePinPointer - Search Criteria' window. At the top, there are input fields for 'Company Name', 'Contact Name', and 'Street Name', along with the 'TechniGraphics' logo. Below these are several filter options: 'Choose City (ies)', 'Choose Zip Code (s)', 'Choose Area Code (s)', 'Choose SIC Code (s)', and 'Choose County (ies)'. There are also fields for 'Number of Employees', 'Type of Product', and 'Select Field'. A 'Target Score' field is set to 'and above'. At the bottom left, there are fields for 'No of Companies' (set to 65) and 'Enter % of companies to be filtered out'. The main area is a table with columns: Company Name, Contact Name, Phone, City, EMP, and SIC. The table contains 20 rows of data. At the bottom, there are buttons for 'Filter', 'Save to Excel', 'SIC Codes', 'Print Company Info', 'Print Mailing Labels', 'Customize Fields', 'Show all Companies', 'Plot on Map', 'Show Map Screen', and 'Exit'.

Company Name	Contact Name	Phone	City	EMP	SIC
Newell Rubbermaid	Phil Clouse	330-264-6464	Wooster	1600	3069
Gerstenslager	Tom Ashby	330-262-2015	Wooster	982	3465
Luk Inc	Raymund Heinen	330-264-4383	Wooster	800	3714
Crown North America	Mike Hooper	330-262-6010	Wooster	600	3714
Bosch Rexroth Corp	Larry Ouwerkerk	330-263-3300	Wooster	556	3594
Wooster Brush Co	James Riggs	330-264-4440	Wooster	500	3991
Frito-Lay Inc	Jim Barnard	330-262-1070	Wooster	350	2096
Stahl, Scott A. Fetze	Steve Rowe	330-264-7441	Wooster	350	3713
Akron Brass Co	Brian Hungerman	330-264-5678	Wooster	300	3569
Bell & Howell Public	Andy Wyszowski	330-264-6666	Wooster	300	2741
Arbortech	Keith Barr	330-264-4266	Wooster	200	3713
Timken Co, The	Jeff Hoer	330-264-1122	Wooster	200	3312
Metals USA/Wooste	Don Gingery	330-264-8416	Wooster	150	3312
Seaman Corp, Indu	Dave Slater	330-262-1111	Wooster	150	2299
Wooster Daily Reco	Rhonda Geer	330-264-1125	Wooster	150	2711
CNC Metal Products	Kim Vantol	330-264-6640	Wooster	140	2542
International Paper	James Gracey	330-264-1322	Wooster	130	2653
Metromedia Techno	Ralph A. Gillota	330-264-2501	Wooster	119	3993
FJ Designs	Darcy Pajak	330-264-1377	Wooster	115	2396
Buckeye Container	T. J. Shea	330-264-6336	Wooster	114	2653
Rayco Mfg Inc	J.R. Bowling	330-264-8699	Wooster	110	3524
Bauer Corp	Ron Smith	330-262-3070	Wooster	100	3499

Save the exported data in your “My Documents” folder. Give it an easy to remember name. For this example we will use “**epin-export.xls**”



2. Close ePinPointer and open the exported file in Microsoft Excel.

The screenshot shows a Microsoft Excel window titled "Microsoft Excel - epin-export". The spreadsheet contains the following data:

	A	B	C	D	E	F	G	H	I	J
1	COMPANY	CONTACT	AREA	PHONE	CITY	EMP	SIC	STNAME	PROD	ST
2	Newell Rub	Phil Clous	330	330-264-64	Wooster	1600	3069	Akron Rd	Rubber & F	111
3	Gerstensla	Tom Ashb	330	330-262-20	Wooster	982	3465	E Bowmar	Automotive	14
4	Luk Inc	Raymund	330	330-264-43	Wooster	800	3714	Old Airport	Automotive	34
5	Crown Nor	Mike Hoop	330	330-262-60	Wooster	600	3714	Old Mansfi	Van Conve	16
6	Bosch Re	Larry Ouw	330	330-263-33	Wooster	556	3594	Old Mansfi	Hydraulic	17
7	Wooster B	James Rig	330	330-264-44	Wooster	500	3991	Madison A	Paint Brus	60
8	Frito-Lay	Ir Jim Barn	330	330-262-10	Wooster	350	2096	Old Mansfi	Corn, Pota	16
9	Stahl, Sco	Steve Row	330	330-264-74	Wooster	350	3713	Old Lincoln	Line, Utility	32
10	Akron Bras	Brian Hung	330	330-264-56	Wooster	300	3569	Venture BI	Fire Fighti	51
11	Bell & How	Andy Wys	330	330-264-66	Wooster	300	2741	Old Mansfi	Microfiche	19
12	Arbortech	Keith Barr	330	330-264-42	Wooster	200	3713	Old Lincoln	Truck Bodi	32
13	Timken Co	Jeff Hoer	330	330-264-11	Wooster	200	3312	Prairie Ln	Seamless	22
14	Metals US	Don Ginge	330	330-264-84	Wooster	150	3312	W Liberty	Steel Leve	10
15	Seaman C	Dave Slate	330	330-262-11	Wooster	150	2299	Venture BI	Industrial F	10
16	Wooster D	Rhonda Ge	330	330-264-11	Wooster	150	2711	E Liberty S	Newspape	21
17	CNC Meta	Kim Vanto	330	330-264-66	Wooster	140	2542	Sylvan Rd	Metal Fabr	20
18	Internation	James Gra	330	330-264-13	Wooster	130	2653	Palmer St	Corrugatec	68
19	Metromedi	Ralph A. G	330	330-264-25	Wooster	119	3993	Venture BI	Flexible Bi	10
20	FJ Design	Darcy Paje	330	330-264-13	Wooster	115	2396	Great Trail	Screen Pri	21

3. Select the entire spreadsheet by clicking the gray box between “A-1”.

Microsoft Excel - epin-export

File Edit View Insert Format Tools Data Window Help

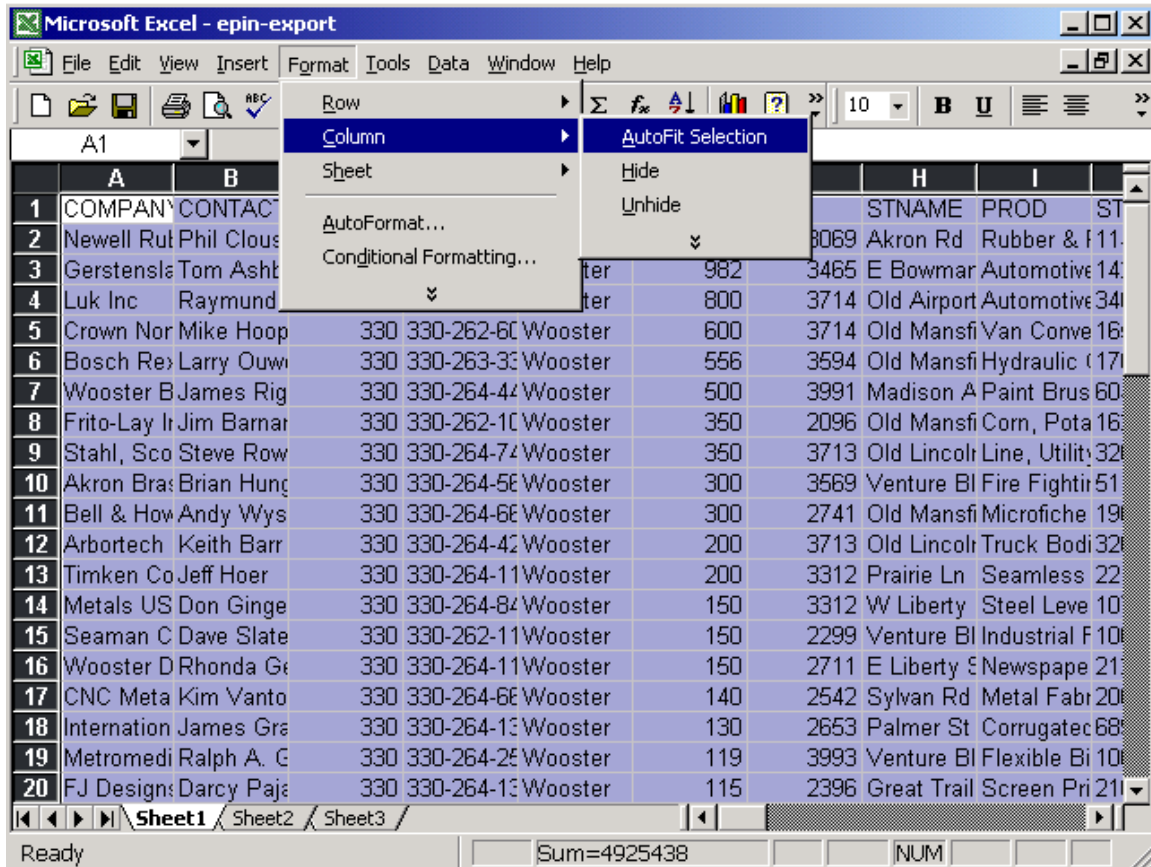
A1 = COMPANY NAME

	A	B	C	D	E	F	G	H	I	J
1	COMPAN	CONTACT	AREA	PHONE	CITY	EMP	SIC	STNAME	PROD	ST
2	Newell Rut	Phil Clous	330	330-264-64	Wooster	1600	3069	Akron Rd	Rubber & F	11
3	Gerstensl	Tom Ashb	330	330-262-20	Wooster	982	3465	E Bowmar	Automotive	14
4	Luk Inc	Raymund I	330	330-264-40	Wooster	800	3714	Old Airport	Automotive	34
5	Crown Nor	Mike Hoop	330	330-262-60	Wooster	600	3714	Old Mansfi	Van Conve	16
6	Bosch Re	Larry Ouwi	330	330-263-30	Wooster	556	3594	Old Mansfi	Hydraulic	17
7	Wooster B	James Rig	330	330-264-44	Wooster	500	3991	Madison A	Paint Brus	60
8	Frito-Lay	Ir Jim Barna	330	330-262-10	Wooster	350	2096	Old Mansfi	Corn, Pota	16
9	Stahl, Sco	Steve Row	330	330-264-74	Wooster	350	3713	Old Lincoln	Line, Utilit	32
10	Akron Bra	Brian Hung	330	330-264-50	Wooster	300	3569	Venture BI	Fire Fighti	51
11	Bell & How	Andy Wys	330	330-264-60	Wooster	300	2741	Old Mansfi	Microfiche	19
12	Arbortech	Keith Barr	330	330-264-40	Wooster	200	3713	Old Lincoln	Truck Bodi	32
13	Timken Co	Jeff Hoer	330	330-264-11	Wooster	200	3312	Prairie Ln	Seamless	22
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15	Seaman C	Dave Slate	330	330-262-11	Wooster	150	2299	Venture BI	Industrial F	10
16	Wooster D	Rhonda Ge	330	330-264-11	Wooster	150	2711	E Liberty	& Newspape	21
17	CNC Meta	Kim Vanto	330	330-264-60	Wooster	140	2542	Sylvan Rd	Metal Fabr	20
18	Internation	James Gra	330	330-264-10	Wooster	130	2653	Palmer St	Corrugatec	68
19	Metromedi	Ralph A. G	330	330-264-20	Wooster	119	3993	Venture BI	Flexible Bi	10
20	FJ Design	Darcy Paja	330	330-264-10	Wooster	115	2396	Great Trail	Screen Pri	21

Sheet1 / Sheet2 / Sheet3

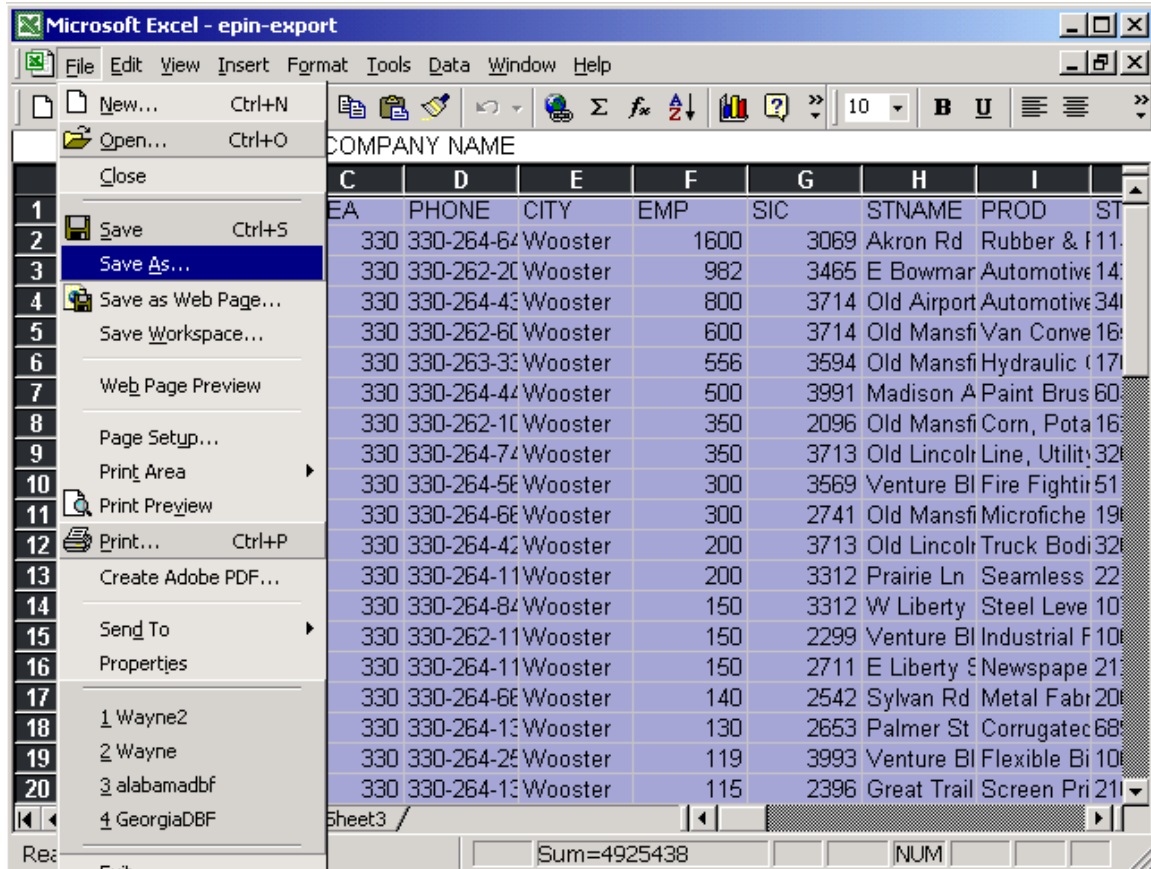
Ready Sum=4925438 NUM

4. Go to the “**Format**” menu. Select “**Column**” and then left click on “**AutoFit Selection**”

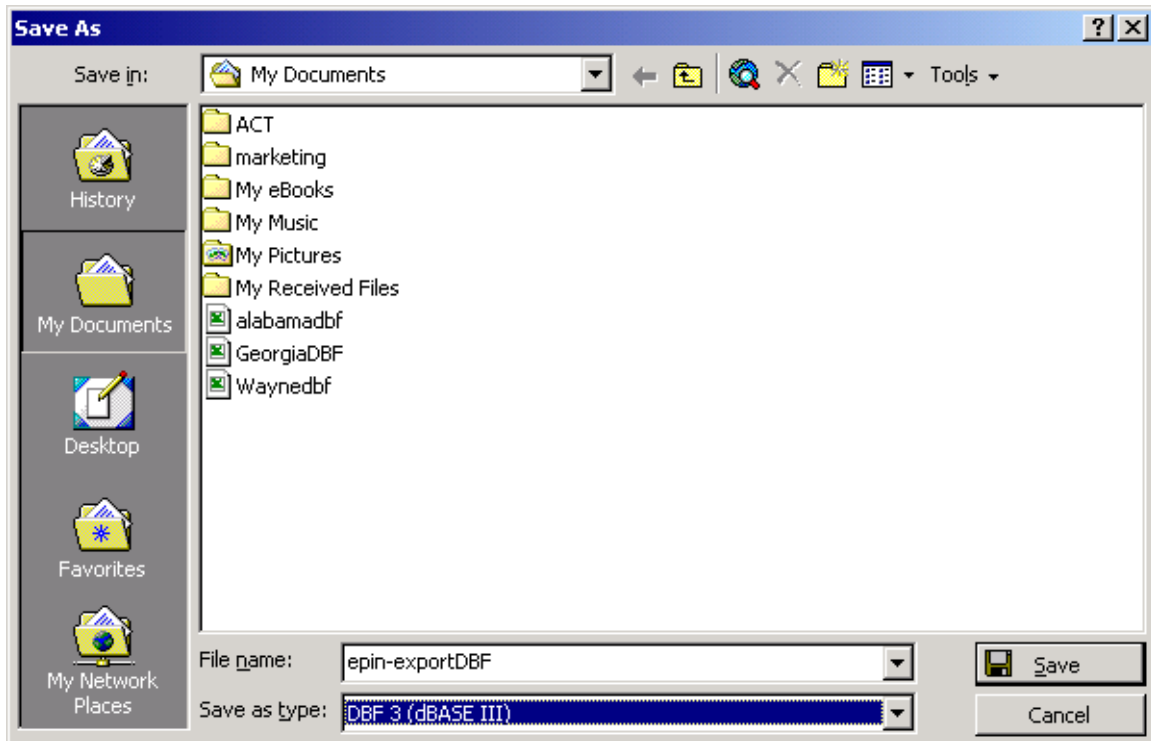


5. Save the spreadsheet as a DBF.

Go to the “File” menu and click on “Save As”.



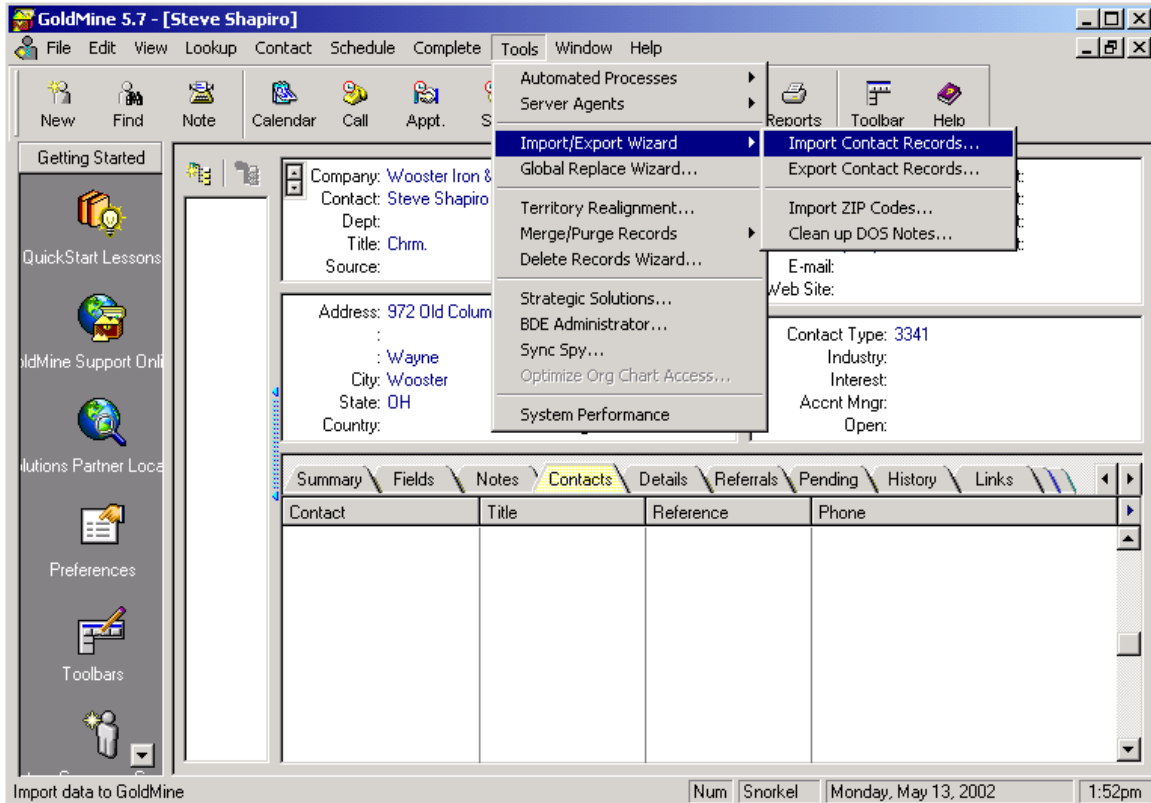
Add “DBF” to the filename to make it easier to locate when importing it to GoldMine.
Change the file type to “**DBF 3 (dbase III)**”



Click Save

6. Import the data into GoldMine.

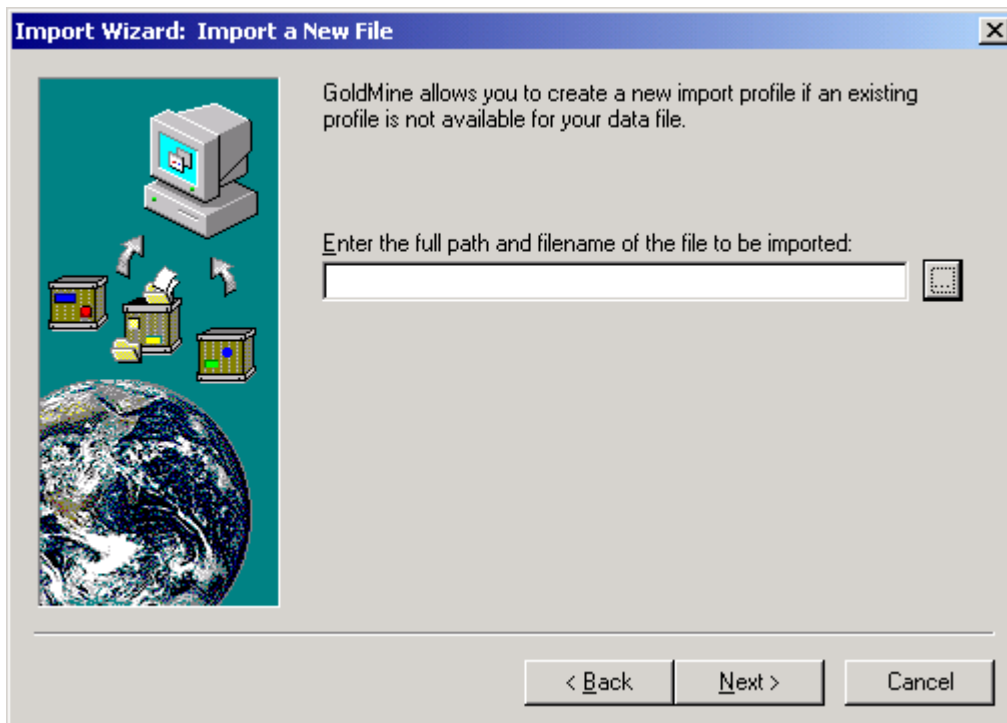
Open GoldMine, and select “**Tools**”, “**Import/Export Wizard**”, and then “**Import Contact Records...**”



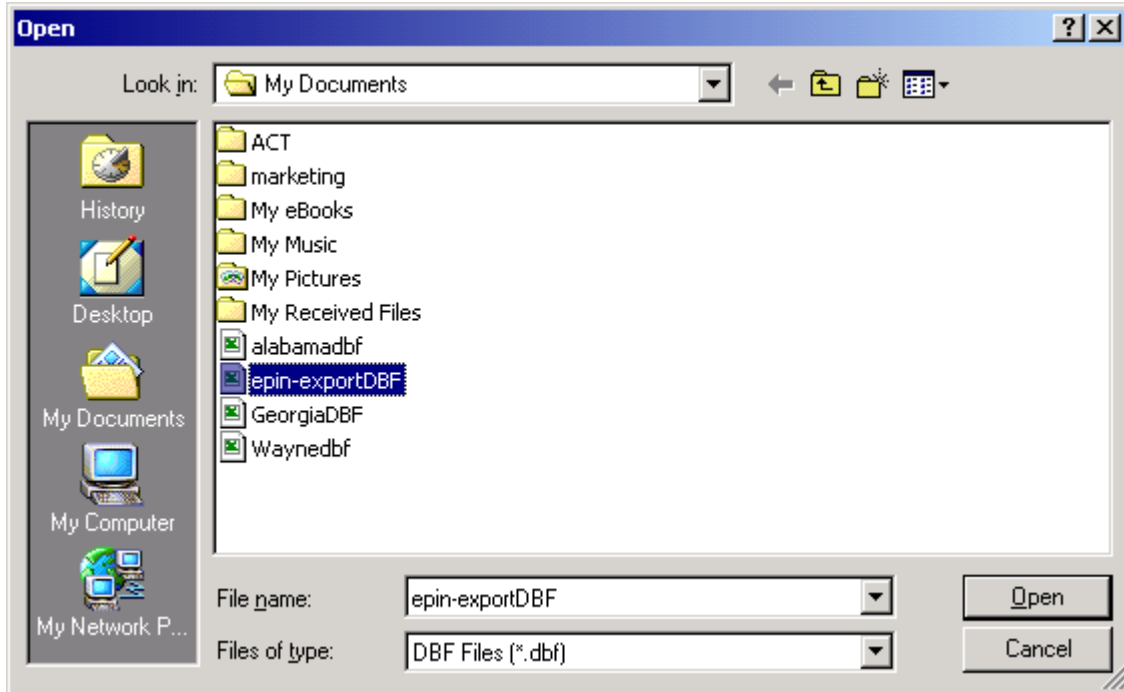
Select “**Import a new file**” and “**DBF file: dBASE data files.**”. Click **Next**



Click the button with the three dots in it on the next screen to browse for the DBF file.

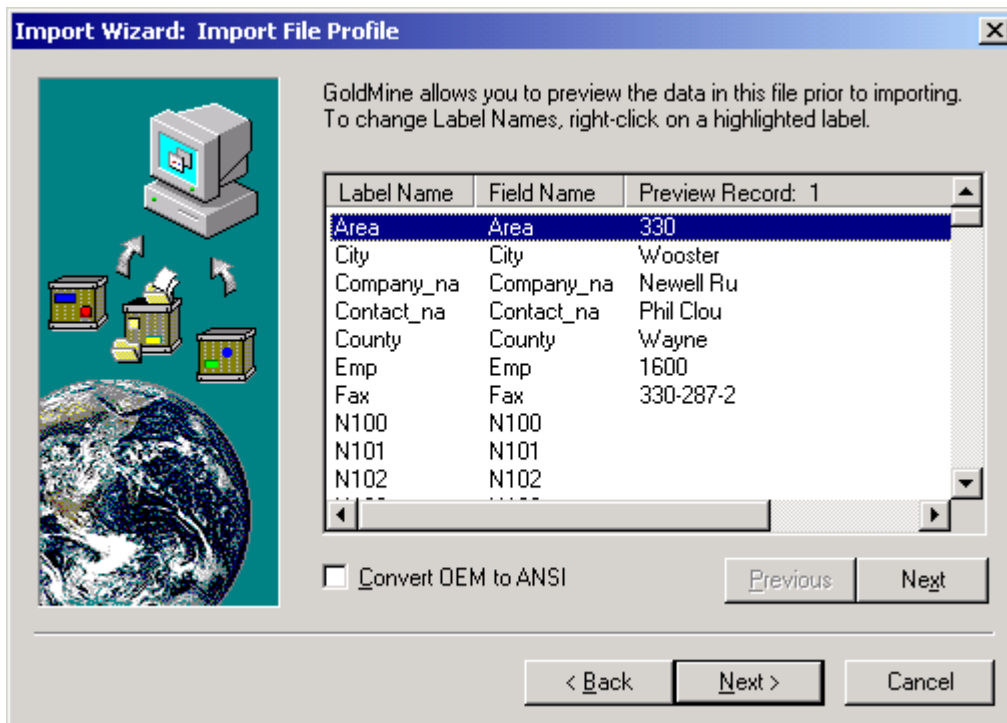


Change to your “My Documents” folder and double-click on your exported DBF file.



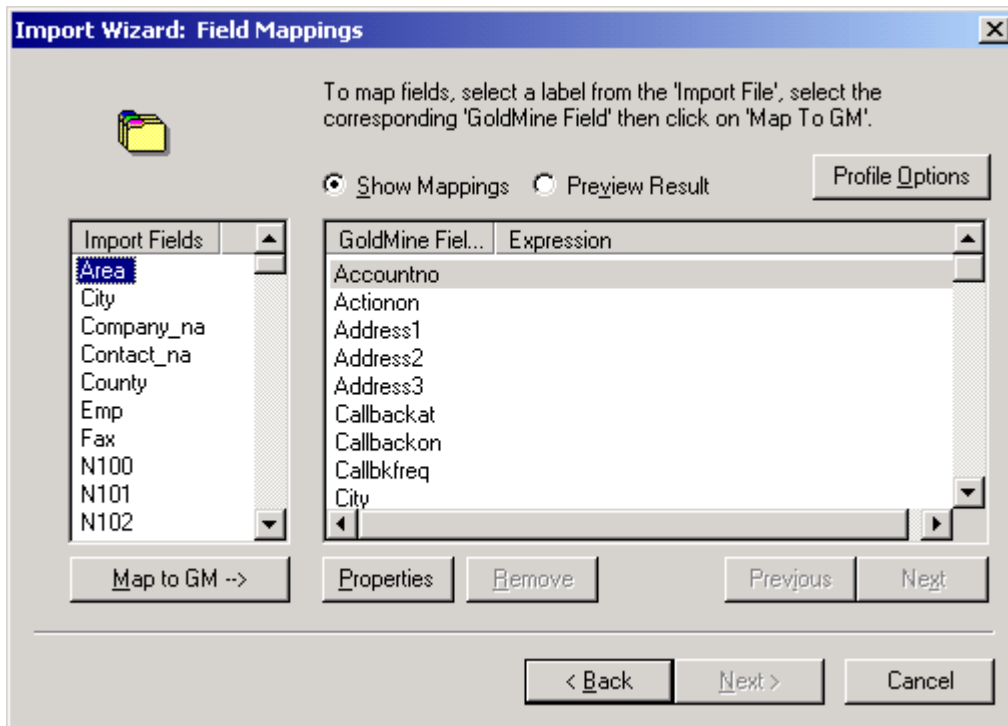
Click Next

The next screen will have a preview of the data contained in the DBF file. Verify that it is the correct DBF file and click the “Next” button on the bottom of the window.

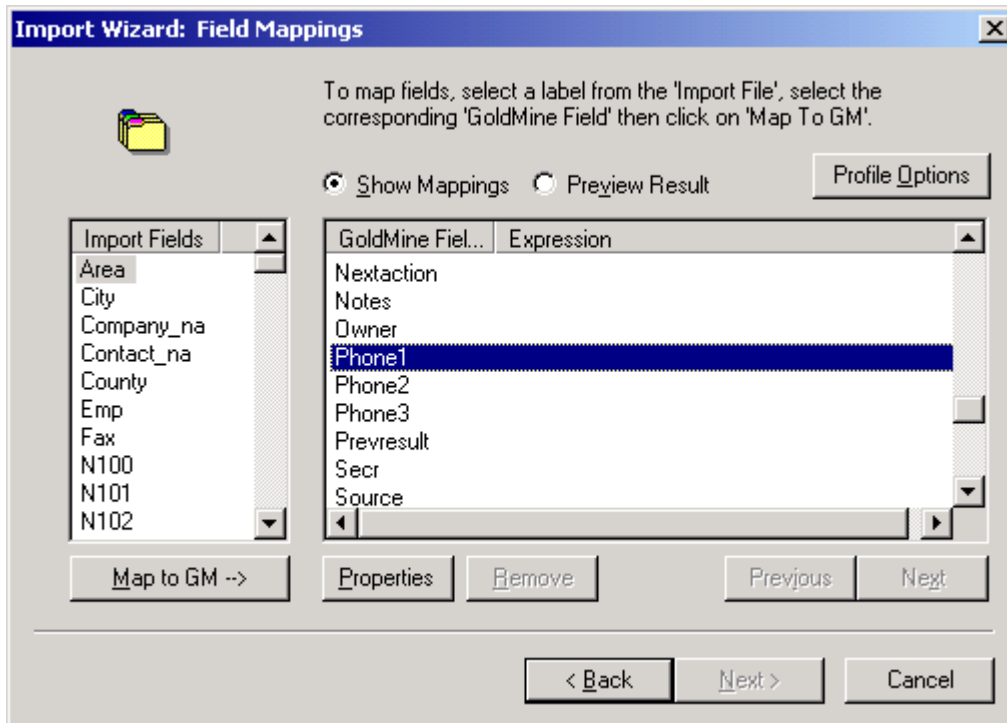


On the next screen you will have to match the ePinPointer fields with the GoldMine fields. You do this by first selecting the ePinPointer field from the left, and then the corresponding GoldMine field from the right. Next, click on the “**Map to GM -->**” button.

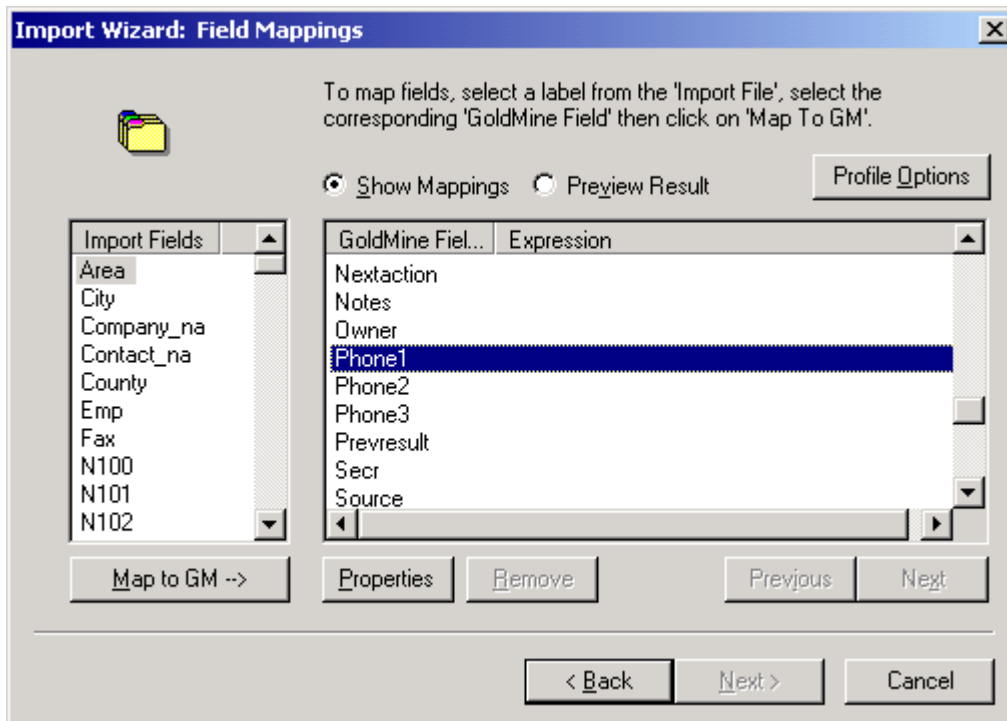
For example, select the “**Area**” field from the left hand side.



Then Select “**Phone1**” from the right hand side.



Click on the “**Map to GM →**” button. Notice that “**Area**” now appears next to “**Phone1**” on the right hand side.



You will need to do this for all of the fields that you wish to import into GoldMine. Below is a list of ePinPointer fields and their corresponding GoldMine fields.

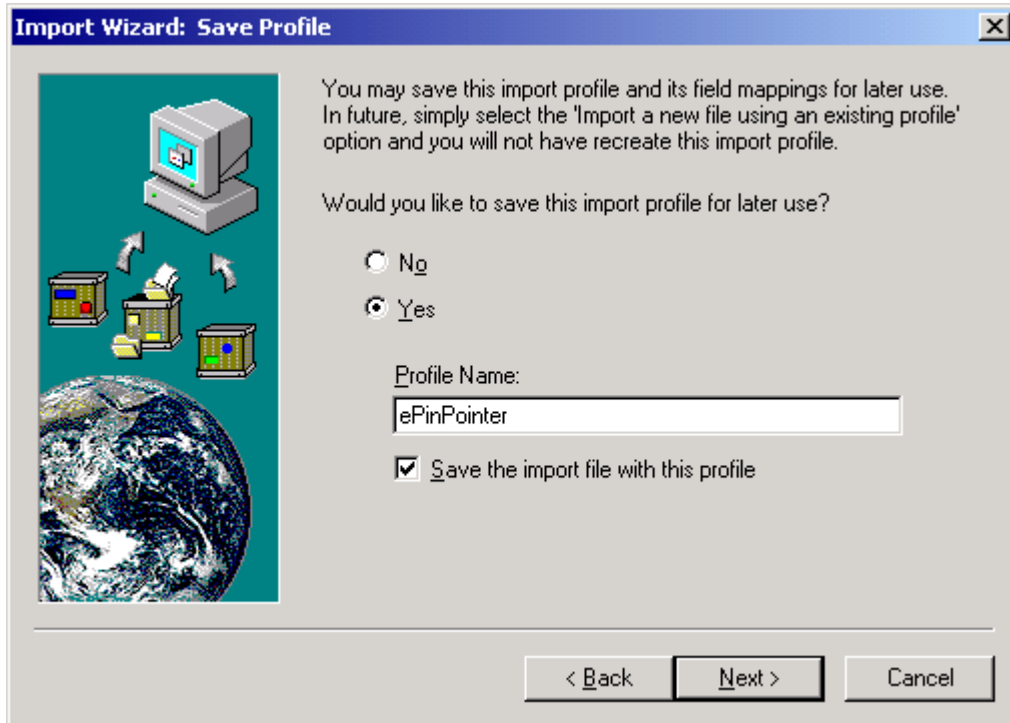
ePinPointer	GoldMine
Area	Phone1
City	City
Company_na	Company
Contact_na	Contact
County	Address3
Emp	Ext1
Fax	Fax
Phone	Phone2
Prod	Notes
SIC	Key1
State	State
Street_add	Address1
Title	Title
Zip	Zip

**Note: The Score, Total, Sname, Target_typ, and Zip2 fields will not be used.*

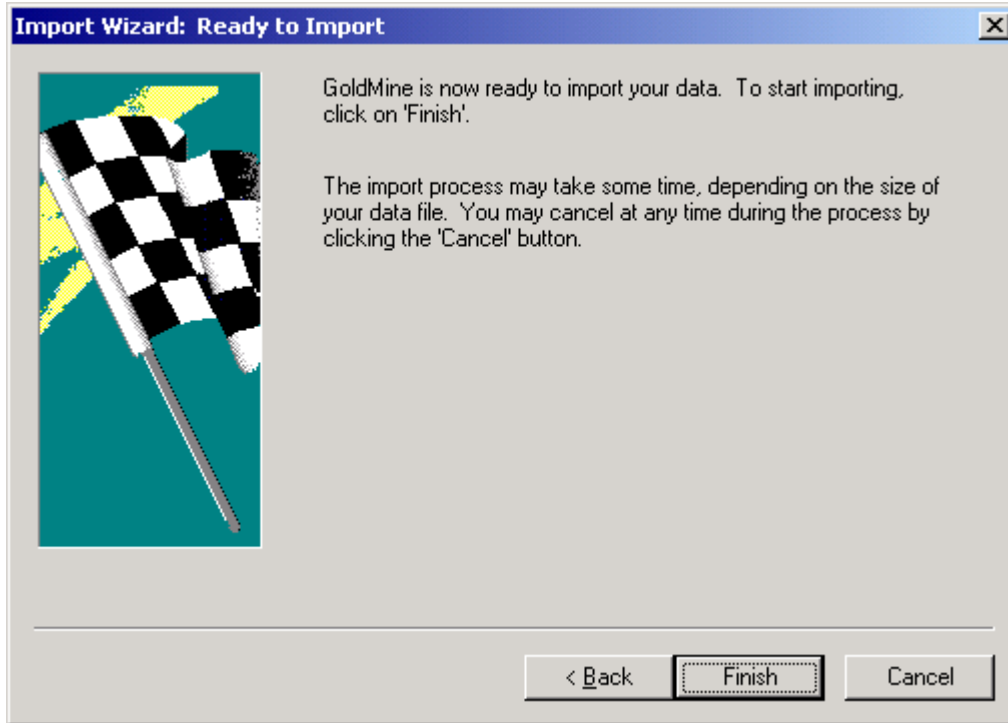
Click **“Next”**

On the next screen choose to save the Import Profile for later use, and call it “ePinPointer”. This will keep you from having to map the field names again.

Click “Next”



Click “**Finish**”



That's it! Your data will now be imported into GoldMine.