

How do I import Contacts data from Excel into PastPerfect?

Version 5.0

PastPerfect has the option to import Catalog, Accession, and Contact records from an Excel spreadsheet into PastPerfect. Although the steps to import seem simple, there are several things to consider before starting an import to ensure the data is properly transferred.

The instructions below relate to specifically importing data into the Contacts database. If you have other information you need to import such as donations, dues payments or volunteer hours, or if you feel like the project is larger than you want to attempt, please call our support office at 800-562-6080 to discuss Import Assistance options.

Please follow all the steps below very carefully before proceeding. Before starting any import, it is important to backup your data and review the information in your Excel file. You will most likely need to do cleanup of your Excel file to make the data useable in PastPerfect.

Instructions for Data Cleanup before Importing:

1. Each contact needs to have its own unique Contact ID number. This requires the addition of an ID# column in your Excel file prior to import.
 - a. If you are assigning ID numbers to your contacts in this column, make sure the ID number is not already in use in PastPerfect. The import process cannot merge data from Excel with existing records; it will create a new record for each row in Excel.
 - b. PastPerfect can assign unique Contact ID numbers during the import process. Just leave the ID# column blank in Excel.

2. Make sure to have columns in Excel that correspond to as many fields in PastPerfect as possible. This may mean you will need to add additional fields to your Excel spreadsheet.
 - a. PastPerfect has individual fields for First Name, Last Name, Spouse Name, Dear Formal ("Mr. and Mrs. Smith"), Dear Casual ("John and Mary"), and Name & Title (such as "Mr. and Mrs. John Smith" or "Ms. Nancy Green."). PastPerfect will not automatically combine information into these fields; information in separate columns is recommended to give you the best data.
 - b. PastPerfect also has individual address fields such as Address 1, Address 2, City, State, and Zip. These fields should be represented by separate columns in your Excel file and information should be properly formatted in these fields before importing.
 - c. Excel has a function called "Concatenate" that can be helpful with populating columns that combine multiple fields together (such as First and Last Names into Name & Title.) Refer to the Help section in Excel for instructions on how to use this function.

3. Phone numbers must be formatted as 123/456-7890. If you do not have an area code, you will need 3 spaces and a dash to hold the spots, " /123-4567". If you have

parentheses around the area code, such as (123)456-7890, remove them.

4. PastPerfect includes three separate email address fields. If your Excel data has multiple email addresses in one column, you will need to split the data into additional columns.
5. Each field in PastPerfect has specific formats and character lengths. You can refer to the Contacts Field Descriptions report if you have questions about the specific formatting of a field. The Field Description reports can be found under “Reports” and then “Fields Descriptions” within PastPerfect.”
6. Excel cells that contain more than 254 characters will be cut off during the import. This is a limitation of Excel. If you have information within fields that are more than 254 characters, you will need to manually copy the text from your Excel file and paste it into the PastPerfect field for the correct record after importing.
7. Make sure you do not have any hidden columns in your Excel file, and remove any columns that you are not importing. Blank or hidden columns will result in data going into the wrong fields.
8. Prior to import, PastPerfect recommends removing field names anywhere in Excel (column headers or Row1). Having this information in Excel will result in a record in PastPerfect with this data. It is recommended to list your columns in order in a Notepad or Word document for reference when importing.

Saving your Excel file before importing:

1. Make sure to delete all the sheets in the workbook except for the one you are importing.
 - a. Right-click on the “Sheet 2” at the bottom left corner of your Excel file.
 - b. Click “Delete.”
 - c. Repeat until you only have the one sheet containing your data.
 - d. Save the file.
2. Make sure your Excel file is saved as a “Microsoft Excel 5.0/95 Workbook.”
 - a. Go to File | Save As
 - b. Choose “Microsoft Excel 5.0/95 Workbook” from the “Save as type” drop-down menu.
 - c. Click “Save.”

Note: If your Excel file is not saved in the correct format, you will get an “Invalid Field List” error when you try to import.

3. Make sure the name of the data file does not have any spaces in it. It should not be longer than 10 characters. Also, make sure the name of the path to the data file is not too long.
 - a. Example: *c:\My Documents\Historical Society\new files>Contact files to be imported.xls* would be too long and contains spaces.
4. Close the Excel file completely. The file cannot be open during the import process, or you will receive an “Invalid Field List” error.

Basic Steps for Importing into PastPerfect from Excel:

1. If using PastPerfect in a networked environment, make sure all other users have completely closed their PastPerfect program and do not open the program until the import has completed, a reindex has been performed, and the new data has been reviewed.
2. **Make a data backup even if there are no records in your PastPerfect program.**
 - a. This backup will give you a restore point if the import does not go as expected.
 - b. To create this backup, from the Main Menu, click the “Hard Drive Backup” button, then click the “Backup Data to Hard Drive” button. After you’ve made a hard drive backup, you can also back up your data to a CD, DVD, or removable drive if you choose.

If you are not able to back up your data in PastPerfect, do not proceed with the import. Call our support office for assistance.

3. Once your backup is successful, go to “Utilities” on the Main Menu and select “Import.”
4. On the Import screen, select “Excel 5” under “Select Source File Type & Name.”
5. Enter the location of your import file. You can use the Browse button  to navigate to the file.
6. Choose “Contacts” as the table you are importing into.
7. Under “Fields to Import”, move the radio button next to “Selected”, then press the “Select Fields” button.
8. Select the PastPerfect fields you are importing your data into by double clicking on each field name under the “Available Fields” column.
 - a. Make sure to select the fields in the order they appeared on your Excel spreadsheet.
 - b. You can change the order of the fields by clicking on the gray box to the left of the field and dragging it up or down.

- i. The field names listed here MUST be in the same order as the columns in your Excel file (for example, if Column A is “First Name” and Column B is “Last Name”, these two fields need to be in the first and second position under the “Import Data into these Fields” section.
 - c. Click “Done” when all the fields you are importing into are listed on the right in the exact order of the columns in Excel.
9. Ensure that the Excel file is completely closed, then click “Prepare Import” to begin the process.
10. On the pre-import screen under “Import File Information”, there will be a count of records found in the import file. We recommend importing “New Records” and “Blank ID#”, if you are allowing PastPerfect to assign unique Contact ID#s. Be sure the “Import” radio button is selected for “New Records” and “Blank ID#”.
 - a. A count of “Duplicate Records” indicates there are Contact IDs in your Excel file that already exist in PastPerfect. Importing these records will result in having multiple records with the same Contact ID#; the import process will not merge the records together. We recommend exiting the import process, reviewing your Excel file, and making corrections.
11. Click the “Browse” button to the right of the New Records option and/or the Blank ID# option. This allows you to see a grid displaying your data along with the fields that data is going into. If the Browse screen does not look correct or any of your data is not showing, we recommend exiting the import process and reviewing your Excel file and field mapping.
12. If the Browse screen looks accurate, click the red “X” in the upper right corner to close it.
13. When you are ready to proceed, click “Import Data Now.” You will receive a message with the number of records that were imported.
14. Exit from the Import screen.
15. Click “Reindex” on the Main Menu
 - a. Make sure the “Rebuild Catalogs” box is checked.
16. Click “Start Reindex Now” to begin the reindex.
17. Once this is finished, exit from the Reindex screen and check your records that you imported. Do not do any data entry in PastPerfect until you have reviewed the records and are sure they imported satisfactorily and successfully.

Please note that once you import data, you should not import that same data again. PastPerfect will not merge records when importing from the same Excel file - it will just

create duplicate records. If you need to start over, restore the backup you made before importing.

If you have any questions, please contact our Support Office at 1-800-562-6080 or email support@museumsoftware.com. Thank you for using PastPerfect!