

Importing Contacts into the GoldMine Business Contact Manager

You can import the data provided on *Casino City's Gaming Business Directory CD* and data downloaded from the GamingDirectory.com website into the GoldMine Business Contact Manager. This section outlines the data import process for version 5.7 of this software.

First you should select the data you wish to import into GoldMine. If you only wish to import a portion of the contacts contained in one of the *Gaming Business Directory* files you must first use a tool other than GoldMine to create a file that includes just the contacts you want to import. If you want to import a portion of the GamingProperty, GamingPropertyContacts, PropertyOwners or PropertyOwnerContacts tables, then we recommend using the GamingDirectory.com website to select and download the appropriate information. Using GamingDirectory.com you can easily select contacts based on a variety of criteria including geographic location, department, and type of gaming facility.

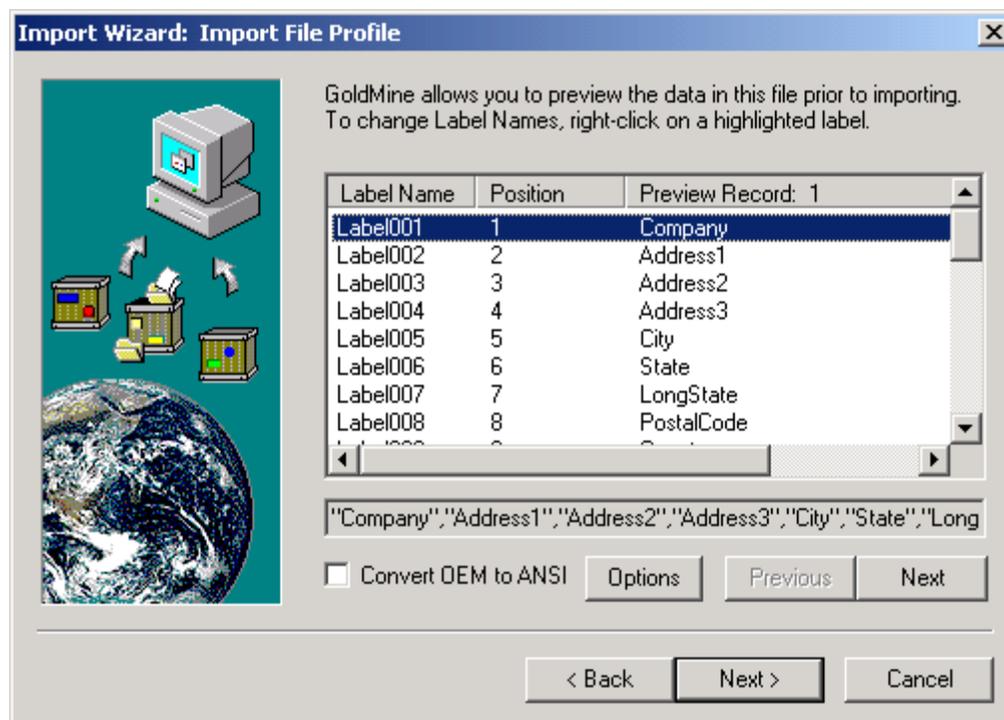
Once you have *Gaming Business Directory* data ready to import you should open the GoldMine database into which the contacts are to be imported. If you want to create a new database for the contacts, use the GoldMine menu system to select File > New Database, provide a name for the new database, and click Next. On the "Create GoldMine Database" screen verify that "Create a new contact database" is checked, check "Create empty tables," specify the directory path where the new database will be stored and click Next. Fill in the "Database Access" screen as appropriate, click Next, and finally, on the "Creating Database Files" screen, click Finish. GoldMine will create and open the new database.

If you want to import contacts into an existing database, we recommend you create a backup copy of the database before proceeding so you can restore the original database if necessary. Although GoldMine does not provide a built-in backup utility, a discussion of backup strategies is provided in the GoldMine Help Index under "backing up data." You can create a backup by copying all files of type *.D* in the folder where the existing database is contained. You can restore the GoldMine database to the backup by restoring the saved files.

You use the GoldMine import wizard to add *Gaming Business Directory* contacts to a GoldMine database. Use the GoldMine menu system to select Tools > Import/Export Wizard > Import Contact Records. Always select "Import a new file." If you are importing contact data downloaded from the GamingDirectory.com website, you should select a file type of "ASCII File" since the file being imported is in comma-separated values format. If you are importing contacts from the CD, you should select a file type of "DBF File" and use the dBase III format files provided in the dBase directory of the CD. Once you have specified the file type and file name click Next. Provide the name of the file to be imported and click Next.

The Import File Profile screen will now be displayed. If you are importing an ASCII File, the screen will appear as shown in Figure 2 below. You should provide meaningful labels for the columns in the input file that you plan to import into GoldMine before clicking Next. To change a Label Name, right-click on the label name, enter the new label name and click OK. Label names must be ten or fewer characters in length. The values shown in "Preview Record: 1" match the column names shown in Appendix A. When these names are ten or fewer characters in length we recommend using these values. When they are more than ten characters in length we recommend substituting the shorter column names shown in Appendix C.

Figure 2: Default GoldMine Import File Profile for ASCII Files



After you click Next on the “Import File Profile” screen, the “Field Mappings” screen will be presented. You must use this screen to specify how to map *Gaming Business Directory* column labels (shown in the left column) to GoldMine fields (shown in the right column). Table 4 shows the names of the *Gaming Business Directory* column labels and the corresponding GoldMine field names. For each label name shown in Table 4 that appears in the left column, first click on the label name in the left column, then click on the corresponding GoldMine field name in the right column, and finally press the “Map to GM” button to complete the association. The GoldMine Contact field should consist of the full contact name, so you must double click on the Contact field, enter one of the expressions shown in Table 4 for Contact, and press the OK button.

The mappings shown in Table 4 are suggested mappings. In some cases you may want to alter the mappings if the suggested use does not match your normal use of the fields. For example, the Phone and Email provided for *Gaming Business Directory* contacts are for the company, and not for the individual contact. If you normally keep personal phone or e-mail addresses in the GoldMine Phone1 and E-mail Address fields then saving company information in these fields may be inappropriate. Doing so would make it hard to merge new *Gaming Business Directory* contact data into existing contact records since the normal merge process would then replace older personalized data with newer company data for an individual contact.

You must decide if you would rather import the TitleLong column or the more compact Title column into GoldMine as the Title field. We generally recommend using the shorter Title column. Please note that the columns shown in the table are not present in all *Gaming Business Directory* files. For example, the PhoneEx column is only present in the Suppliers and SupplierContacts tables.

You can also import additional columns listed in Appendix A or C that are not shown in Table 4 below, into GoldMine. Generally, additional columns should be mapped to GoldMine’s user

defined fields. You should import any columns that will be useful to you in your interaction with the contacts you are importing.

We recommend that you import the PropertyId or OrganizationId and ContactId columns into GoldMine. We will change the name of a property contained in the Company field to match a newer preferred property name. Similarly, the name of an individual can change due to a change in marital status or a spelling correction. If the PropertyId or OrganizationId and ContactId fields are included in your GoldMine database then subsequent updates can be merged based on the more stable PropertyId or OrganizationId and ContactId values.

Table 4: Mapping Gaming Business Directory Columns to GoldMine Fields

GoldMine Field	Column Label or Expression
Company	Company
Address1	Address1
Address2	Address2
Address3	Address3
City	City
State	State
Zip	PostalCode
Country	Country
Phone1	Phone
Ext1	PhoneEx
Fax	Fax
Phone2	TollFree
Ext2	TollFreeEx
Web Site	WebSite
E-mail Address	Email
Dear	FirstName
LastName	LastName
Title	Title or TitleLong
Contact	trim(FirstName) + “ ” + trim(LastName)
Contact	trim(Salutation) + “ ” + trim(FirstName) + “ ” + trim(LastName)

Once you have completed the field mappings, click Next. You will be presented with the “Save Profile” screen. Click Next on this screen and you will be presented with the “Ready to Import” screen. Click Finished on this screen and the GoldMine Process Monitor window will appear and show the status of the import process.

If you imported an ASCII File, then the initial record containing the column names will have been imported into GoldMine as a contact record and should be deleted. Use the GoldMine menu system to select Lookup > Company. Enter the value “Company” as the company name you are looking for to locate the initial record. Once the initial record is selected as the current contact record, use the GoldMine menu system to select Edit > Delete Contact. Make sure all items are selected, and click Delete.

When GoldMine imports contact records it always creates a new contact record for each imported contact. This is done even if the contact has the same name, company name, address, and phone number as an existing contact record. After the import is complete you can merge

previously existing and new contact records and purge duplicate records using the GoldMine Merge/Purge Wizard. To launch the wizard use the GoldMine menu system to select Tools > Merge/Purge Records > Merge/Purge Wizard. On the initial Wizard screen check “Merge/Purge using new criteria” and click Next. On the Select a Filter/Group screen select “All Contact Records” and click Next to display the Merge/Purge Criteria screen.

If you have imported updates to previously imported *Gaming Business Directory* contacts that included a ContactId, we recommend that you perform a merge/purge operation based on the combination of ContactId and either PropertyId or CompanyId as appropriate. Click New on the Merge/Purge Criteria screen to identify new criteria for selecting records that will be merged or purged. Select the field that contains the ContactId, check Exact Match, assign the criteria a weight of 30, and click OK. Click New on the Merge/Purge Criteria screen again, select the field that contains the PropertyId or CompanyID, check Exact Match, assign the criteria a weight of 30, and click OK. Verify that the Qualifying Weight is set to the default value of 50 and click Next. When both criteria are satisfied for a pair of contact records the calculated weight will be $30+30=60$, which exceeds the Qualifying Weight required to identify a match.

On the Merge Method Screen check “Keep record that was created first,” uncheck all other items and click Next. On the Purge Method screen, select “Delete the duplicate record” and click Next. On the Ready to Merge/Purge screen click Finish. The GoldMine Process Monitor window will appear and show the status of the merge/purge process.

You may also want to perform a merge/purge operation for contacts that have matching Contact and Company fields. Simply repeat the process outlined above using the Contact and Company fields.