Contained within are the instructions for importing the data captured at the Tradeshow into some popular applications. If you are not using one of these software packages, please consult your application's user manual and follow the list of instructions. The information you will need to import your leads from the diskette to the software can be found under the terms *IMPORT, IMPORTING, MERGE, ASCII, or DELIMITED*. Should you have any trouble importing your leads, please contact the registration company from the show; they will be able to help you.

WHAT IS ON YOUR DISK?

- **VISITOR.TXT** contains all of your leads that you obtained at the show. These leads are in a *comma-delimited ASCII* format.
- **BART5000.SET** was used to set up your unit. Please just ignore this file.
- **LAYOUT.TXT** describes the layout of the fields within each record. The section titled [Record Layout] has one line identifying each field in the VISITOR.TXT field's record, and the section titled [Demographic Tables] shows the decoding of every possible demographic code to its meaning. A copy of the registration form that was filled out by the show's visitors may be a helpful supplement for this section.

For Expo 5000 only

- **EXPAND.BAT** is a batch file to run MAPPER.EXE and instructs it to use map.cfg (located on the USB stick) and VISITOR.TXT (also located on the USB stick) as its input files and output the expanded leads to LEADS.TXT. You run this batch file if you want to save your leads as LEADS.TXT. If you want to change the name of the file to something other than the default name of LEADS.TXT or if you want to change the directory from the default of the USB stick (usually drive E), then you need to run MAPPER.EXE
- **MAPPER.EXE** is used to expand the Y/N follow-up codes to include the original questions. It will also expand the demographics fields to their full meaning. This executable file is run if you want to change the name of the file from LEADS.TXT or if you want to change the directory to something other than the default of the USB stick (usually drive E:).
- **MAP.CFG** is a configuration file that MAPPER.EXE uses to expand the demographic and follow-up codes to their full meaning. This file is updated as questions are added or as the keyboard purchase option is changed.

What do I do first?

First, you need to determine which of these files you will run. If you want to save the newly created and expanded leads file as LEADS.TXT then you will run EXPAND.BAT. If you want to change the directory of the newly created and expanded leads file to something other than the default of LEADS.TXT, run MAPPER.EXE.

Instructions for using EXPAND.BAT

1. Go to WINDOWS EXPLORER.
   Click on "Removable Drive" (usually drive E:) which will display all the files on the USB memory stick.
2. Double click on EXPAND.BAT. When EXPAND.BAT has finished running, a pop-up screen will appear. This screen indicates the number of records expanded, the location and name of the file created, as well as the number of the largest record.

This is important information because certain software packages are limited in the size of the record they can import. When this limitation is exceeded, the software will crash and you will be unable to continue. Should this occur, you can correct the situation by doing the following:

1. Copy VISITOR.TXT to VISITOR.ORG to save the original file.
2. Open VISITOR.TXT using Notepad or WordPad.
3. Look for the largest record (from the pop-up screen).
4. Delete this line from the file.
5. Save the file as VISITOR.TXT and EXIT.
6. Run EXPAND.BAT again.

7. Repeat these steps until the largest record is the size that your software can handle. {this information can be found in your software's user manual}

3. When the files finishes running, go to your USB stick. A new file has been created, named LEADS.TXT. This is the file you will use to import your leads into your database manager.

Instructions for using MAPPER.EXE

1. Open Windows Explorer.
2. Click on "Removable Drive", (usually drive letter E:), which will display all the files on the USB memory stick.
3. Double click on MAPPER.EXE. A text box will appear. It will say:
   "Enter map file name→" you type MAP.CFG and hit enter
   "Enter visitor file name→" you type VISITOR.TXT and hit enter
   "Enter file name for the expanded leads→" you type the location and name of the file as well as the extension of .TXT (i.e. c:\newfie.txt). This is the file you will use to import your leads into your database manager.

IMPORTING LEADS INTO ACT! 5.0-6.0

1. Insert your USB memory stick or diskette into your computer.
2. Open Notepad.
3. Open MAP.CFG from the USB memory stick or diskette (if available).
4. Click FILE and PRINT.
5. Open LAYOUT.TXT from USB memory stick or diskette.
6. Click FILE and PRINT.
   **Keep these 2 printouts. You will use them when mapping your visitor file into your Act! Database.
7. Open ACT!
8. Click FILE on the toolbar.
9. Click NEW to create a new database.
10. Click Act! Database.
11. Click OK.
12. NEW DATABASE dialog box appears. Type a name for your new database – We suggest the name of the show at which you obtained your leads.
13. Click SAVE.
14. Act! Prompts you to enter MY RECORD information. You need to fill this in so that you can start building your new database. When all of the information is entered, click OK. A dialog box appears asking if all the information is correct. If it is, click YES. If it is not, click NO and correct the information.
15. Once you click YES, you are in MY RECORD of the new database.
16. Click on the USER FIELD tab at the bottom of the screen. You will see USER FIELDS #1 through 9. USER FIELDS 10 through 15 are located under the STATUS Tab.
17. You will need to change the names of the user fields to match the demographic information contained on the visitor badges as well as the answers to your YES/NO questions (if you choose to map the questions). To change the names of the fields, click on EDIT at the top of the screen. Click on DEFINE FIELDS. The DEFINE FIELD dialog box appears. On the left hand side of the screen there is a list of all fields. Use the down arrow until USER 1 is showing. **PLEASE NOTE: The user fields are not in numerical order.

Please remember that all of the USER FIELD NAMES will be determined by your show's information contained in your LAYOUT.TXT.

IMPORTING YOUR INFORMATION

Once you have setup your user fields, you are ready to begin importing your names.

01. Click FILE.
02. Click DATA EXCHANGE.
03. Click IMPORT. The Import Wizard dialog box pops up. Be sure that the FILE TYPE is TEXT DELIMITED.
04. Click on the box next to FIELD NAME AND LOCATION. The Open DIALOG BOX pops up.
05. Change the LOOK IN field to LEADS.TXT if you used EXPAND.BAT or the location of the file you created using MAPPER.EXE or VISITORA.TXT.

06. Click on the FILE NAME and Click OPEN.
07. This brings you back to the Import Wizard. Click NEXT.
08. Click the radio button for Contact Records only. (This is the only file you want to import!)
09. Click OPTIONS.
10. Click the radio button for COMMA under SELECT FIELD SEPERATOR.
11. Click inside set entry box, choose DOS.
12. Click YES to import first record.
13. You are now back at the IMPORT WIZARD DIALOG BOX. Click NEXT.
14. Click the radio button for DON'T USE PREDEFINED MAPS.
15. Click NEXT.
16. You are now at the CONTACT MAP.
    All of the fields in the left column are the fields of your first record. Click in the right hand column next to name. A drop down box appears in the column. Click on the arrow, and a drop down list appears. Go to the field name that matches the field you are mapping. The sequence of these fields can be found in the [RECORD LAYOUT] section of LAYOUT.TXT.

    Since Act! Is limited to the number of user fields that can be changed, you may need to change the name of some of the default fields so that you can map all of the information contained on your USB memory stick or diskette.

    Your database will now merge all of your records and you are done! Congratulations!!

IMPORTING LEADS INTO GOLDMINE
STANDARD EDITION, VERSION 4.0

01. Insert USB memory stick or diskette into your computer.
02. Open Notepad.
03. Open MAP.CFG from the USB memory stick or diskette (if available).
04. Click FILE and PRINT.
05. Open LAYOUT.TXT from USB memory stick or diskette.
06. Click FILE and PRINT.
    **Keep these 2 printouts. You will use them when mapping your visitor file into your GoldMine Database.
07. Open GoldMine.
08. Click OPEN FILE.
09. CONTACT FILES dialog box appears, Click on NEW.
10. CREATE GOLDMINE DATABASE dialog box appears; enter the description of the database. You can use the show name. Click NEXT.
11. Make sure CREATE A NEW CONTACT DATABASE is checked. Click on the Box to browse for the directory that you want your database to reside in. If you do not know where to put this data, please contact your systems administrator. Make sure that the CREATE EMPTY TABLES radio button is checked. Click NEXT.
12. The DATABASE ACCESS dialog box appears; here you determine who will have access to this database – it is up to you, the user.

    Contact Set Code for Synchronization*:* Should your company use this, you can set the code you choose. If you do not know whether or not you use synchronization or what code to use, please contact your systems administrator or leave it blank.
13. Click NEXT.
14. Click FINISH. Your database will now be created. Please allow it a few minutes to run.
15. Once it is completed, click on FILE.
16. Click OPEN FILE.
17. Highlight the file you just created and Click OPEN. Your new database is now open!

CREATING CUSTOM VIEWS

You will now need to create a custom view. This will allow all of the information you collected to be seen. The following steps require you to have Master Rights to GoldMine. If you do not see CONFIGURE GOLDMINE when you click on FILE, then you do not have Master Rights. Please contact your systems administrator in order to have these rights granted to you.

01. Click FILE on the Menu.
02. Click CONFIGURE GoldMine.

03. Click CUSTOM VIEWS.
04. Click NEW.
→VIEW NAME - it is up to you, could be the name of the show.
→TAB NAME - accepts 10 characters. If you leave it blank, you get the FIELD tab by default.
→USER ACCESS - up to you and company policy.
05. Click OK.
06. Click CLOSE.
07. Click FIELDS TAB or the TAB you named in Step 4.
08. Right click in the body of the FIELDS TAB. A pop-up menu appears with different views. Click on the view name you just created. This screen will appear blank because you have not set up your user fields yet.

CREATING CUSTOM LABELS

01. Click FILE.
02. Click CONFIGURE GOLDMINE.
03. Click CUSTOM FIELDS.
04. The USER DEFINED FIELDS dialog box appears.
05. Click NEW. The USER DEFINED FIELD PROFILE dialog box appears. Please refer to the LAYOUT.TXT printout to map the following fields.

There are several sections to this box:
a. FIELD NAME: Has the letter U already entered. This U will remain in the name even when you type over it. For example, when you delete the U and type FAVCOLOR, GoldMine will list this label name as UFAVCOLOR. This field is restricted to 9 characters. Recommendation: Use part of the name you will type in the DESCRIPTION edit box.
b. DESCRIPTION: Contains 25 characters that you can use to better identify the field name. Recommendation: Type the name on the next line to [Demographics Tables] section of the layout.txt printout. If this line is empty, click CANCEL and skip to step 8.
c. FIELD TYPE: You choose this by the label you are creating. If the label you are creating is a number or date, click the appropriate radio button. CHARACTER is the default which can be the name, address, city, state, etc.
d. LEN: (which is the length of the field) Should be big enough to hold the demographic field. We recommend making it 90.

06. Click OK. Using the name on the line next to "------------", repeat steps 5 and 6 until you have finished naming all of your demographic fields.
07. Look for [QUESTIONS] section found in the MAP.CFG printout. (If this line is empty, skip to Step 13.)

Click NEW. The USER DEFINED FIELD PROFILE dialog box appears.

There are several sections to this box:
a. FIELD NAME: Has the letter U already entered. This U will remain in the name even when you type over it. For example, when you delete the U and type FAVCOLOR, GoldMine will list this label name as UFAVCOLOR. This field is restricted to 9 characters. **Recommendation: Use part of the name you will type in the DESCRIPTION edit box.
b. DESCRIPTION: Contains 25 characters that you can use to better identify the field name. **Recommendation: Type in "FOLLOW UP CODES".
c. FIELD TYPE: choose CHARACTER.
d. LEN: (which is the length of the field) Should be big enough to hold the follow up code. We recommend making it 30.

08. Click OK.
09. Repeat steps 7 and 8 until you have finished naming all of the questions.
RECOMMENDATIONS:
a. For FIELD NAME, use UQ# where # is the number of the question you are mapping. (Start with 2)
b. Leave DESCRIPTION empty.
c. FIELD TYPE should remain Character.
d. Change the LEN (length) to 30.

10. Click REBUILD. This will allow all of the labels to be viewed.
11. Click OK. You are now back at the Contact Screen.
12. Click on the FIELDS TAB or the name you gave to TAB NAME in Step 4 of CREATING CUSTOM VIEWS section.

13. Right Click and choose NEW FIELD.
14. A box appears on the screen. If the box is RED, left click on it and drag it until it turns white. This prevents one field from being on top of another.
15. Double Click on the box of the label you are adding.
16. In the FIELD DATA SECTION, Click the FIELDS button and highlight the name of the field.
17. Click OK. Continue until all of your custom fields are added

You are now ready to import your leads.

IMPORTING LEADS

01. Click on TOOLS.
02. Click on IMPORT RECORDS. The GOLDMINE IMPORT WIZARD box appears.
03. Make sure the radio button for Import a New File is checked and the radio button for ASCII file is checked.
04. Click NEXT.
05. Enter the location and the name of the file to be imported.
06. Click NEXT once. The file name has been entered.

You are now at the IMPORT FILE PROFILE dialog box.

07. Double click on the LABEL NAME and change it to match what is in the [RECORD LAYOUT] section on the LAYOUT.TXT printout.

    When you get to the "Answer" section on the LAYOUT.TXT print out, enter the [FOLLOW UP CODES]. Name the remaining fields Q# where the # corresponds to the number of the question you are mapping.

08. Continue Step 7 until you have renamed all of the labels.
09. Once that is done, click NEXT (at the bottom of the screen.)

You are now at FIELD MAPPINGS

10. Click on the IMPORT FIELD.
11. Click on the corresponding GoldMine field.
12. Click on Map to GM→ button.
13. Repeat Steps 10 through 12 until all of your fields are mapped.
    Please note: If need be, you can map 2 or more import fields to one GoldMine field.
14. When you have mapped all of your fields, click NEXT.
15. The SAVE PROFILE dialog box appears. You can save the import profile if you wish; you determine the name.
16. Click NEXT.
17. Click FINISH.
18. The PROCESS MONITOR dialog box appears. Close this box once all of the leads have been imported.

Your leads are now imported! CONGRATULATIONS!

IMPORTING LEADS INTO MICROSOFT OUTLOOK 2000-2003

01. Insert the USB memory stick or diskette into your computer.
02. Open the Outlook program.
03. Click on FILE.
04. Click on IMPORT/EXPORT. The IMPORT/EXPORT WIZARD appears.
05. Click on IMPORT FROM SCHEDULE+ OR ANOTHER PROGRAM.
06. Click NEXT.
07. Click on COMMA SEPERATED VALUES.
08. Click NEXT.
09. At FILE TO IMPORT, Click BROWSE.
10. Go to the file that was created after you expanded the VISITOR.TXT file. This will either be C:\LEADS.TXT, C:\VISITORA.TXT or the name of the file you created.
    **Please note: If the file names do not show, please type in the file name as LEADS.TXT, VISITORA.TXT or the name of the file you created and then Click OPEN.

11. Under OPTIONS, choose any of the 3 options you would like; it is all a matter of personal/company preference.
12. Click NEXT.
13. Select the destination folder: CONTACT.
14. Click NEXT.
15. Click on the IMPORT LEADS.TXT or VISITORA.TXT (or the file you named) box. This will lead you to a screen where you will map the fields that you will import.
16. Follow the instructions at the top of the screen:
    --Make sure the first record that contains field names is UNCHECKED
    --On the right side of the screen, the side labeled MICROSOFT OUTLOOK CONTACTS, click on the + to expand the fields. You will need to do this especially with the address field so as to be able to map the street address, city, state and zip as separate fields.
17. Once all of the fields have been mapped, click OK.
18. Click FINISH; all of the leads will now be imported into your contact database.

Congratulations! Your import is complete!!

IMPORTING LEADS INTO EXCEL 2000-2003

01. Insert the USB memory stick or diskette into your computer.
02. Open Excel.
03. Click FILE.
04. Click OPEN.
05. Change look in to 3 ½ floppy A:
06. Change Files of type to ALL FILES.
07. Click on VISITORA.TXT

You are now in the TEXT IMPORT WIZARD SCREEN.

08. Make sure the radio button for DELIMITED is pressed.
09. Click NEXT.
10. The DELIMITER is comma. Make sure this box is checked. Be sure that you UNCHECK any other boxes that are checked. The TEXT QUALIFIER should be a quotation mark (“).
11. Click NEXT.
12. The COLUMN DATA FORMAT can be changed depending on the information in the column. The default format is GENERAL and can be left as such.
13. Click FINISH.
14. Rename you column headers to reflect the information contained in each column.
15. SAVE your new file.

All of your information is now displayed in an Excel Spreadsheet.

FORMING LETTERS USING MICROSOFT WORD

Word 2000

01. Open word.
02. Click on TOOLS menu.
03. Click on MAIL MERGE. The MAIL MERGE HELPER DIALOG BOX appears.
04. To create a letter, click the CREATE button and choose FORM LETTERS. Select ACTIVE WINDOW.
05. Click the GET DATA button, and choose OPEN DATA SOURCE.
06. Select ALL FILES from the FILES OF TYPE drop down list.
07. Navigate to the LEADS.TXT file or the file you created if you used the MAPPER.EXE program.
08. Click the EDIT MAIN DOCUMENT button on the dialog box that will appear.
09. Type your letter.

    FOR EXAMPLE:

    Dear _________________

Thank you for your interest in our product line. Enclosed is the information you have requested.

Sincerely,
Your name

10. After you have finished typing your letter move your cursor to a location in your letter where you would like to insert a merge field and abouce your document. You may continue adding additional merge fields using the method.
11. Once you have finished inserting all of your merge fields click on the TOOLS menu and choose MAIL MERGE again.
12. Click the MERGE button and select MERGE TO PRINTER.
13. Follow the onscreen prompts and your merged letters will print.

Congratulations, you are now following up with your leads!

Word 2002-2003

01. Open Word.
02. Click on the TOOLS menu.
03. Click on LETTERS AND MAILINGS then click on MAIL MERGE. The MAIL MERGE HELPER SCREEN appears on the right hand side.
04. To create a letter, make sure the LETTERS radio button is selected and then click “Next: Starting a Document” at the bottom of the helper screen.
05. Make sure the “Use Current Document” radio button is selected and then click “Next: Select Recipients” at the bottom of the helper screen.
06. Make sure the “Use an existing list” radio button is selected and click on BROWSE.
07. Navigate to the LEADS.TXT file or the file you created if you used the MAPPER.EXE program.
08. The MAIL MERGE RECIPIENTS LIST DIALOG BOX will appear. Click on the OK button. Click “Next: Write your letter” at the bottom of the helper screen.
09. Type your letter.

FOR EXAMPLE:

Dear _________________

Thank you for your interest in our product line. Enclosed is the information you have requested.

Sincerely,
Your name

10. After you have finished typing your letter move your cursor to a location in your letter where you would like to insert a merge field and click on “More Items” in the MAIL MERGER HELPER SCREEN to add in your merge fields.
11. Click the MATCH FIELDS button in order to map your data to the appropriate merge fields.
12. The MATCH FIELDS DIALOG BOX will appear. Select the correct field mapping from the drop down lists next to each merge field.
13. Once you have mapped all your fields, click the OK button. You will be returned to the INSERT MERGE FIELDS DIALOG.
14. Select the ADDRESS FIELDS radio box. Click on the field from the list that you would like to insert and click the insert button.
15. To insert more fields in this location repeat step 14. To insert more fields in a different location in your letter click the CANCEL button, move your cursor to the new location and perform steps 10-14.
16. Continue inserting fields into you letter as many times as you like following the directions in step 15.
17. Once you have finished inserting merge fields, click “Next: Preview your letters” at the bottom of the HELPER SCREEN.
18. Your letter will be shown replacing the merge fields with the data from your first record.
19. If you need to make changes you may click “Previous: Write your letter” at the bottom of the HELPER SCREEN. If everything looks satisfactory you may click “Next: Complete the merge” to finish your merge.
20. Click on PRINT and follow the onscreen prompts. Your letter will be printed.

Congratulations, you are now following up with your leads!

The units are able to capture a great deal of information in each record. However, your database manager may not be equipped to handle it all. If this is the case, you will need to decide which pieces of information are the most important to your company; these are the fields that you will map into your software. Should you want to see all of the information you captured at the show, you can use spreadsheet software such as Excel or Lotus 123. This way, each piece of information is entered into its own column.