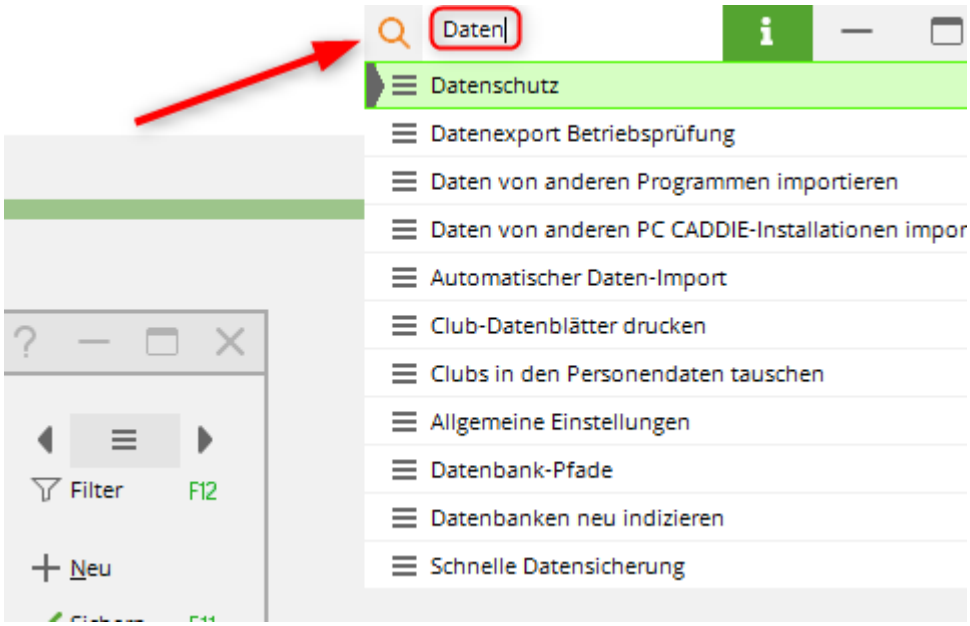
Import data from other programmes

You can access the menu item via ***System/Contacts/Import data from other programmes*** or via our search function:



With the following steps you can easily transfer personal data (addresses, handicaps, etc.) from other programmes into PC CADDIE. If you have no experience with this, please contact our support team.

Firstly, you must convert the personal data into a standard format. This format should be structured in such a way that the data is saved in a text file in which each line contains the data of one person. The different fields should be separated by a tab or a semicolon. In many programmes, you can create such a file simply by using the address export for serial letters. With the address export, the personal data is saved in a file whose name you can often choose yourself.

In any case, check the membership numbers already assigned before the automatic import via a list of persons. Persons with identical membership numbers would be overwritten during an import without further enquiry. To do this, you can print a simple list of all persons with their membership number, sorted by membership number, in PC CADDIE. This gives you an overview of assigned and free membership numbers.

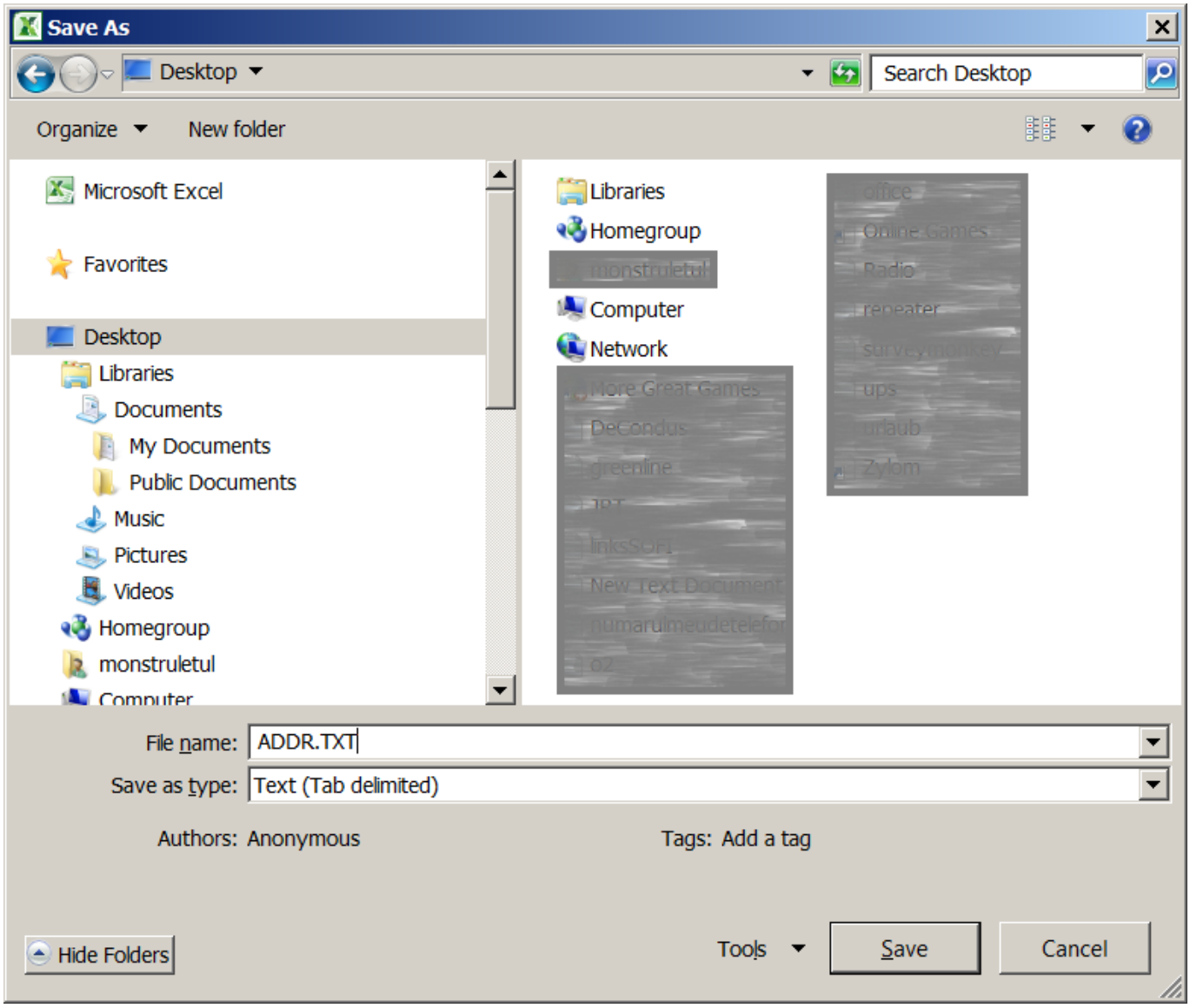
Before importing, be sure to make a Fast data backup .

If you have created data in an Excel format, for example, use the first line for one heading per column, e.g. title, first name, surname, postcode, city, street, date of birth. The file must be created in such a way that PC CADDIE can import the individual fields. The title and surname must therefore be separated in two columns, as they cannot be separated during import. Use the fields in PC CADDIE as a guide.

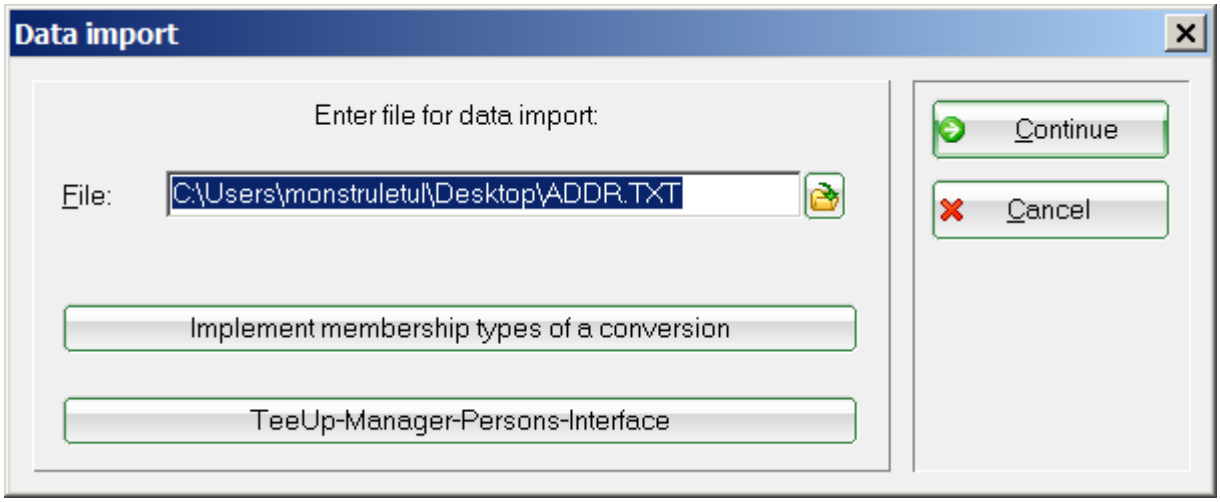
Once you have saved the data, you can save it in the appropriate format as follows:

- Open your Excel file
- Select in the menu *Save file as*

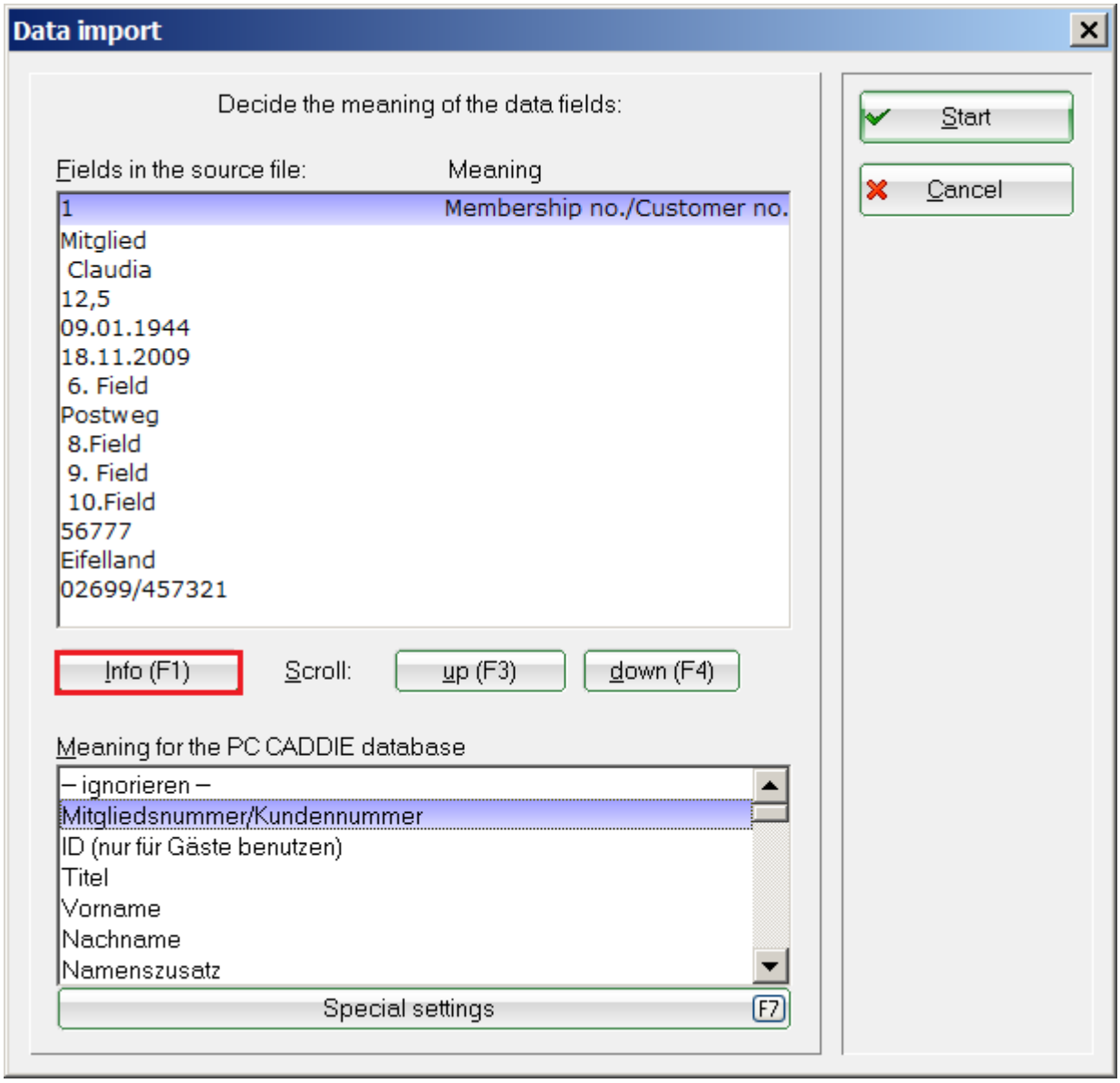
- Save the file to your desktop (you can also save the file under *My files* (you can also save the file under My Documents - remember the path and the file name so that you can find it again quickly)
- Select „Text (tab-delimited) (*.txt)“ for the file type (at the bottom of the dialogue).
- Enter e.g. „ADR.TXT“ for the file name (you can also choose a different file name).
- Then click on ***OK*** and confirm the warnings



Then switch to PC CADDIE and open via ***Import persons/data*** to open the next window. Enter the path of the file you have just created and confirm with ***Continue.***

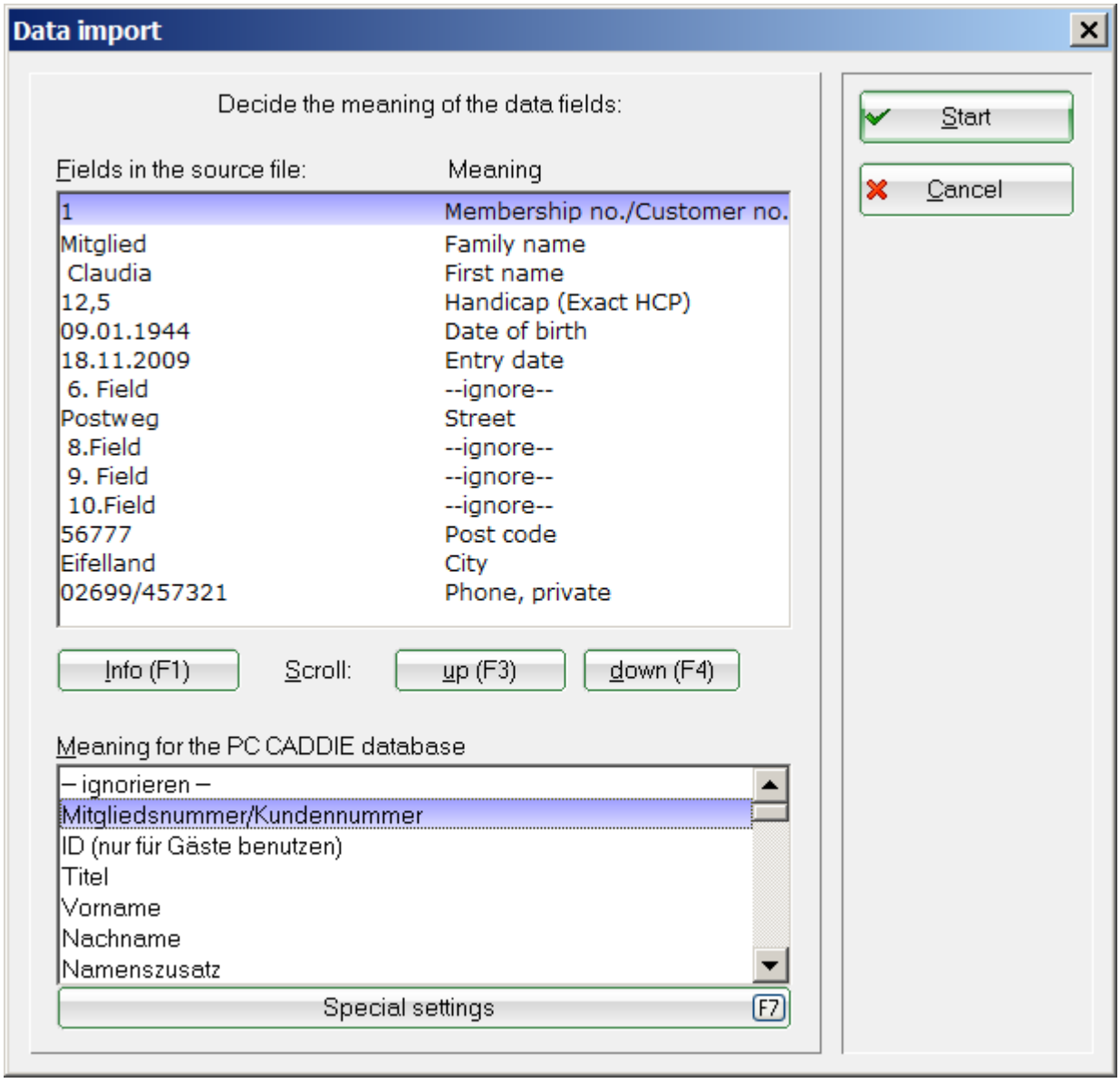


Now you need to define what meaning the individual fields in your address file have for PC CADDIE. For example, you select the field ***Surname,*** then in the lower field also select ***Surname*** in the lower field. In this way you tell PC CADDIE that in your field ***Surname*** field contains the surname of the person to be imported. Similarly, define all the fields that you want to import. If you are unsure and do not know what the field should mean, you can use ***Info*** (F1) to recognise the field content.

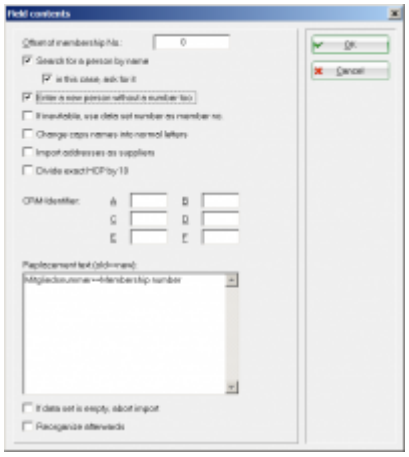


You can ignore fields without meaning or fields that you do not need. Please note that the special fields 1-8 are the PC CADDIE additional fields, do not import into these fields without consulting support.

Once you have completed these steps, the window will look similar to the next screenshot: (This screenshot is only intended as an example. Your window may therefore have different content).

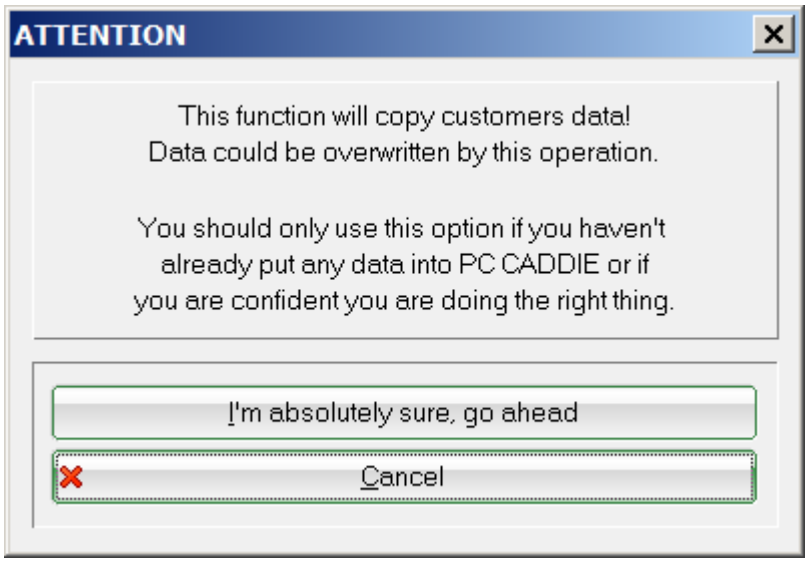


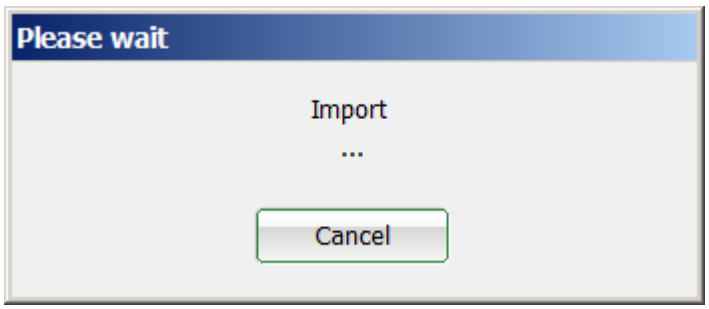
Under **Special settings (F7)** you can also import data without a membership number. Please note that the corresponding checkboxes must be ticked to prevent an existing data record from being overwritten.



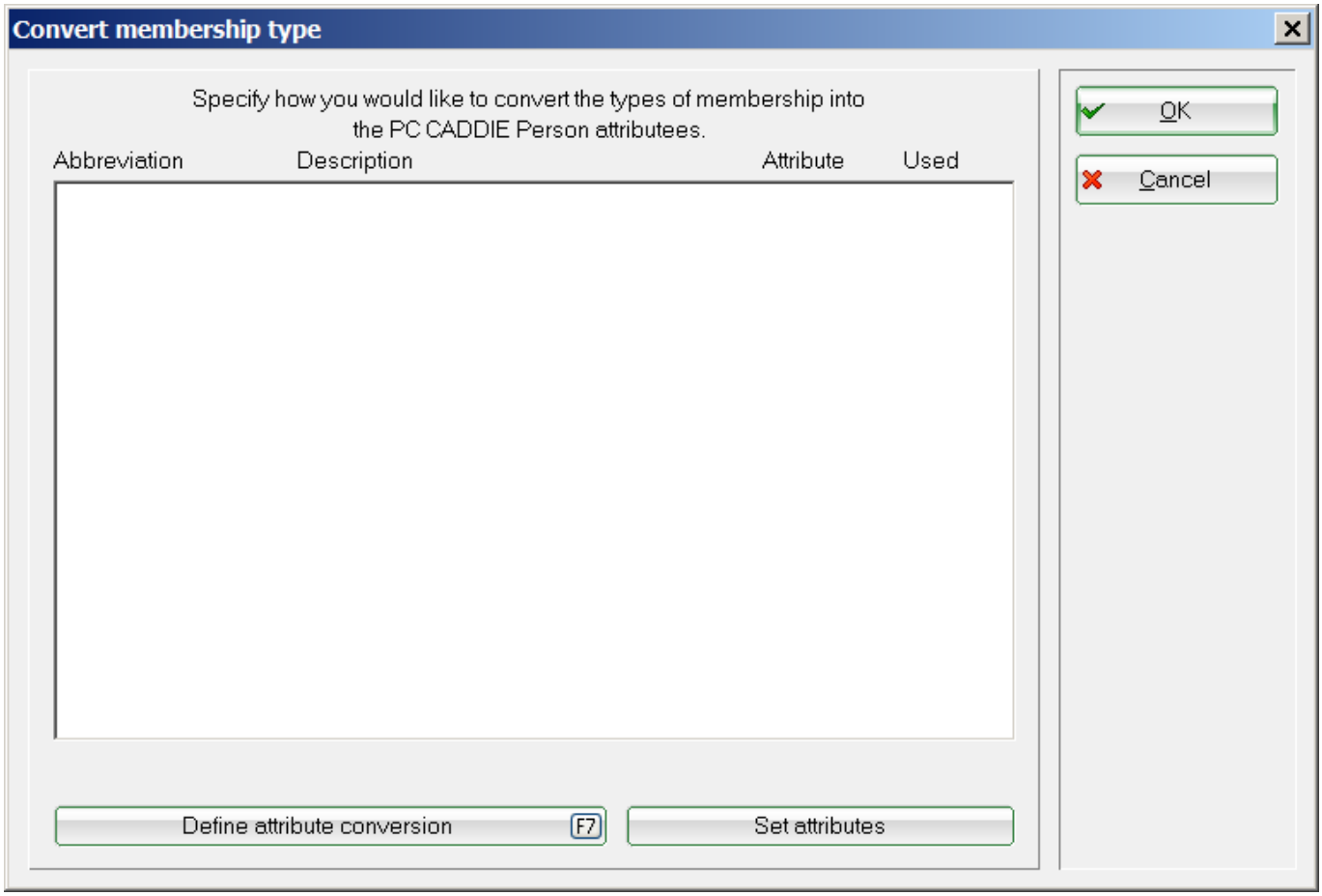
The tick boxes for **Search people by name** and with **ask if necessary** ensure that overwriting is prevented. **Create new person without number** Enables the creation of data records without a member number (this is then assigned automatically by PC CADDIE).

With ***Start*** to start transferring the data to PC CADDIE. This is followed by queries, which you should confirm accordingly.





After the transfer has been completed, there is a query as to how the membership types should be converted.



However, you can initially skip this point (i.e. simply click on ***OK*** button), it can also be done later.

Just try it out, the transfer can also be repeated if something does not work.

It is important that you assign at least the member number correctly to the person in the fields, as otherwise the same persons may not be recognised as being the same when they are transferred again.