

The guidelines for Importing Excel Spreadsheets

First in Collectorpro create your appraisal as you normally would.

To Import:

The first thing we suggest is to back up the original spread sheet. Then your next step will be to map the current spreadsheet data into the location you want the data inserted into the fields in Collectorpro. We will provide you with the blank mapping guide and explain. Below is an illustration:

ID	Category	Subcategory	Type	Material	Date	Origin
Owner#	Books	Fiction/NF	Title	HB/PB	Published	Author

In the example above, I am importing a book collection, remember you can always change field titles in Collectorpro to customize for any type of collection, which I will do once I have imported the Excel and the fields will match the data.

When mapping you will not need to insert data in all fields but leave the master fields in place to make sure the information goes into the correct location in Collectorpro.

When all fields are inserted into the corresponding fields you want them into, save this Excel as a Text (Tab delimited) or CSV (Comma Separated Value) the CSV requires all commas in the text be removed. The first is a better option in case there are commas that may skew the import.

Save the mapped spreadsheet to your computer.

Now you are ready to import into Collectorpro.

In the appraisal you created

Click on **Utilities**

Import/Export Data

Import Objects into Current Appraisal

Select text file to import (the file you just created) and select the radial button whether it is a Comma or Tab and click Preview.

If you have previewed and all looks to be correct, check whether the import has a header row or not leave blank and Import! If the data does not look correct click on Cancel-Do Not Import. Review data and try again.

If you have any questions or there is an issue please call us at 972-908-3964