

Import from Excel

Import people and items from MS Excel

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For use with MaestroAuction 5

Part One: Locate the templates



Maestro provides templates for importing items and people into your database. The templates are Excel spreadsheets that have the proper headers filled-in already.

The templates are located:

- In MaestroAuction on the Import People [8,1] and Import Items [8,2] screens.
- In MaestroHelp.com next to the import items and import people videos.

Part Two: Prepare the template

Things to know

- You will copy and paste your data into our template.
- MaestroAuction is programmed to import from a MaestroAuction-specific Excel spreadsheet layout.
- Before importing, you must reformat your data to match the MaestroAuction columns (fields).
- See **Import Field List** in the next section for explanations on the headers.

Best Practices Guidelines

- Make a copy of the spreadsheet. Personalize the new file name before entering data.
- Never change the names in the first row, also called the Header Row.
- You MAY delete columns that you do not need or change the column order.
- Once the data has been imported into MaestroAuction, rename the spreadsheet so that you do not import it again.

People Import Templates

There are two people import templates:

- The **Basic** template which is suitable for most users.
- The **Complete** template which is suitable for advanced users or specialty imports.

Headers on Basic Template

You are not required to have data for every field.

Field Name	Primary/Spouse	Description
Sal	Primary	Salutation (Mr. Mrs. Doctor)
Lname	Primary	Last Name
Fname	Primary	First Name
SpouseSal	Spouse	Salutation (Mr. Mrs. Doctor)
SpouseFname	Spouse	First Name
SpouseLname	Spouse	Last Name
CustomAddressLine	Both	Custom Address Line (like Dr. Smith & Mrs. Smith-Boyle)
PrimaryMobile	Primary	Mobile Phone Number
PrimaryEmail	Primary	Email Address
SpouseMobile	Spouse	Mobile Phone Number
SpouseEmail	Spouse	Email Address
MailToHome	Both	Mail To Home? (Yes: to Home Address) (No: to Work Address)
Address1	Primary	Home Address Line 1
Address2	Primary	Home Address Line 2
City	Primary	Home City
State	Primary	Home State (like WA)
Zip	Primary	Home Zip Code
Country	Primary	Home Country
HomePhone	Primary	Home Phone (can be typed as (425)688-0809 or as 4256880809)
HomeFax	Primary	Home Fax (can be typed as (425)688-0809 or as 4256880809)
Company	Primary	Company Name
CompanyContact	Primary	Contact Name within the Company
WAddress1	Primary	Work Address Line 1
WAddress2	Primary	Work Address Line 2

WCity	Primary	Work City
WState	Primary	Work State (like WA)
WZip	Primary	Work Zip Code
WCountry	Primary	Work Country
WorkPhone	Primary	Work Phone (can be typed (425)688-0809 or 4256880809)
WorkPhoneExt	Primary	Work Phone Number Extension
WebSite	Both	Home Web Site Address

Headers on Complete Template

You are not required to have data for every field.

Field Name	Primary/Spouse	Description
Sal	Primary	Salutation (Mr. Mrs. Doctor)
Lname	Primary	Last Name
Fname	Primary	First Name
SpouseSal	Spouse	Salutation (Mr. Mrs. Doctor)
SpouseFname	Spouse	First Name
SpouseLname	Spouse	Last Name
CustomAddressLine	Both	Custom Address Line (like Dr. Smith & Mrs. Smith-Boyle)
PrimaryMobile	Primary	Mobile Phone Number
PrimaryEmail	Primary	Email Address
SpouseMobile	Spouse	Mobile Phone Number
SpouseEmail	Spouse	Email Address
CustomAddressLine	Both	Custom Address Line
CustomSalutation	Both	Custom Salutation (Mr. John "Bubba" Smith)
MemberRef#	Primary	Organization Membership Number
SpouseMemRef#	Spouse	Organization Membership Number
MailToHome	Both	Mail To Home? (Yes: to Home Address) (No: to Work Address)

Address1	Primary	Home Address Line 1
Address2	Primary	Home Address Line 2
City	Primary	Home City
State	Primary	Home State (like WA)
Zip	Primary	Home Zip Code
Country	Primary	Home Country
HomePhone	Primary	Home Phone (can be typed as (425)688-0809 or as 4256880809)
HomeFax	Primary	Home Fax (can be typed as (425)688-0809 or as 4256880809)
Company	Primary	Company Name
CompanyContact	Primary	Contact Name within the Company
WAddress1	Primary	Work Address Line 1
WAddress2	Primary	Work Address Line 2
WCity	Primary	Work City
WState	Primary	Work State (like WA)
WZip	Primary	Work Zip Code
WCountry	Primary	Work Country

WorkPhone	Primary	Work Phone (can be typed (425)688-0809 or 4256880809)
WorkPhoneExt	Primary	Work Phone Number Extension
WFax	Primary	Work Fax (can be typed (425)688-0809 or 4256880809)
WEmailAddress	Primary	Work Email Address
BidderNumber	Primary	Bidder Number
Member	Primary	Is a Member of the Committee? (Yes/No)
SpouseMember	Spouse	Is a Member of the Committee? (Yes/No)
PCat1	Primary	Sort Category #1 (like Solicitor, Auctioneer, Parent, etc ...)
PCat2	Primary	Sort Category #2 (like Solicitor, Auctioneer, Parent, etc ...)
PCat3	Primary	Sort Category #3 (like Solicitor, Auctioneer, Parent, etc ...)
PCat4	Primary	Sort Category #4 (like Solicitor, Auctioneer, Parent, etc ...)

SCat1	Spouse	Sort Category #1 (like Solicitor, Auctioneer, Parent, etc ...)
SCat2	Spouse	Sort Category #2 (like Solicitor, Auctioneer, Parent, etc ...)
SCat3	Spouse	Sort Category #3 (like Solicitor, Auctioneer, Parent, etc ...)
SCat4	Spouse	Sort Category #4 (like Solicitor, Auctioneer, Parent, etc ...)
PriText1	Primary	User Defined Text #1
PriText2	Primary	User Defined Text #2
PriText3	Primary	User Defined Text #3
SpText1	Spouse	User Defined Text #1
SpText2	Spouse	User Defined Text #2
SpText3	Spouse	User Defined Text #3
SysLinkText	Both	Alphanumeric System Link Field (Alpha Numeric)
SysLinkInteger	Both	Numeric System Link Field (Whole Digits Only)
WebSite	Both	Home Web Site Address
EmailAddress	Both	Home Email Address
WEmailAddress	Both	Work Email Address
WebSite	Both	Work Web Site Address
MemberTeam	Primary	Name of the Team the Primary is on
OrganizationOfficeHeld	Primary	Position in Organization held by the Primary
SpouseOrgOfficeHeld	Spouse	Position in Organization held by the Spouse
SpouseMemberTeam	Spouse	Name of the Team the Spouse is on
InvitationRequested	Both	Has an invitation been requested? (Yes/No)
InvitationSent	Both	Has an invitation been sent? (Yes/No)
DonorSponsor	Both	Name of Person who solicited this person (Last Name, First Name)
Comments	Both	General comments about the person
Profile	Both	Information for the person's profile
QuickCheck	Both	Will the Attendee be using QuickCheck? (Yes/No)
REConID	Both	RE7 Constituent ID (Blackbaud Clients only)
RERecID	Both	RE7 Record ID (Blackbaud Clients only)

RESyncDate	Both	RE7 Sync Date (Blackbaud Clients only)
REContactID	Both	RE7 Contact ID (Blackbaud Clients only)

Part Three: Import Data

- You may import data at any time.
- Be mindful not to import the same people or items more than once.

Import People Data

1. Check the Auction Event listed **In Use** at the bottom of the **Main Menu** to make sure your current event's database is in use.
2. Open the **Import People [8,1]** screen.
3. Click the **Delete Imported Data** button in order to remove any old data that may still be in the temporary holding table.
4. Click **Step 1: Select Import Data File**.
 - a. Find and select a spreadsheet to import, then click the **Select** button
 - b. MaestroAuction will then attempt to import the spreadsheet into a temporary holding table.
 - c. Review the data to make sure that this is what you want to import.
5. Optional: click **Step 2: Detect Duplicates**
6. Click **Step 3: Import People Data**

Import Item Data

1. Check the Auction Event listed **In Use** at the bottom of the **Main Menu** to make sure your current event's database is in use.
2. Open the **Import Items [8,2]** screen.
3. Click the **Delete Imported Data** button in order to remove any old data that may still be in the temporary holding table.
4. Click **Step 1: Select Import Data File**.
 - a. Find and select a spreadsheet to import, then click the **Select** button
 - b. MaestroAuction will then attempt to import the spreadsheet into a temporary holding table.
 - c. Review the data to make sure that this is what you want to import.
5. Click **Step 2: Append Imported Items to Auction Database**