

## How to prepare a Microsoft Excel spreadsheet file for import in to Contacts Organizer PBE

1. Open Microsoft Excel and select **File, Open** from the Menu bar.
2. Select your Excel spreadsheet file and open it up.
3. Although you can change the order of columns within Contacts Organizer PBE, you may find it easier in Excel first. You should change the order of columns so the information they hold appears in the order as stipulated on page 45 of the Contacts Organizer manual. The column titles do not have to exactly match the same names as stipulated as long as the information they hold is the type of information that is expected by Contacts Organizer. *For example you may not have a column entitled Town (it may be called City or Address4, or even something else) but as long as it is the 11<sup>th</sup> column from the left that is fine.*

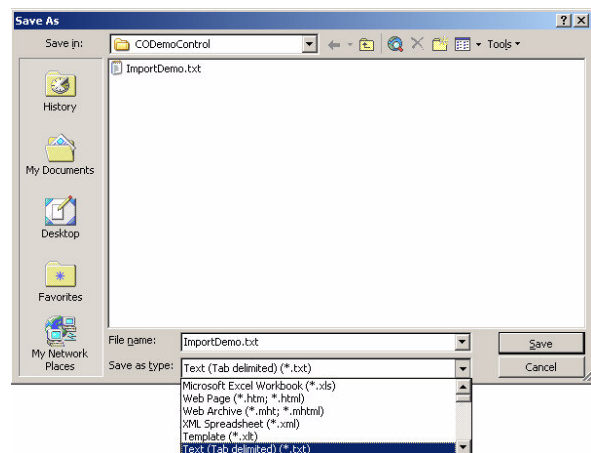
To change the order of columns around the easiest way is to first - insert a blank column at the position where you want to move another column to. Do this by pointing at the column to the right of where you want your new column to appear and clicking your secondary mouse button (normally the right button) on the column header where the column letter appears, and selecting the *Insert* option.

Click here to insert between FirstName and JobTitle

	A	B	C	D	E
1	<b>Title</b>	<b>FirstName</b>	<b>Job Title</b>		<b>EmailName</b>
2	Ms	Jane	Marketing Director		Me
3	Mr	Nick	Training Officer		W
4	Mr	Fred			MF
5	Mr	Philip	Managing Director		Sl
6	Mrs	Sue			Rc
7	Mr	Dennis	Managing Director		St
8	Mrs	Dave	Personnel Manager		To

This creates a blank column at the column to the left of where you selected. Secondly, point to the column – on the column header again – that you want to move, and again right-click but this time select the *Cut* option. Thirdly, point to the blank column – on the column header again – that you want to move to, and again right-click and this time select the *Paste* option. Finally, point to the new blank column header, right-click and select the *Delete* option. Repeat these actions now for any other columns you want to move.

4. You now need to save the file. Just save it as an Excel file first as a backup, then save again as a tab-delimited text file. To do the second option select **File, Save As** from the Menu bar. In the Save As type box at the bottom of the dialog, click on the drop-down arrow and choose *Text (tab-delimited)*. Do not forget to name the file in the *File name* box, and make a note of the folder you save it in. If you are warned about losing features just click on *Yes* to continue.



5. Now you can close the file.
6. Now continue with the import instructions as shown in the Contacts Organizer manual on page 45.