

Organizing Excel spreadsheets including Concatenating Columns before importing data into WorkCenter

You can import data into WorkCenter using several different formats incorporated in our import wizard. We suggest that you use Excel for the best results. This video will give you suggestions on how to organize your Excel spreadsheet to get the best benefits out of importing the data with our import wizard.

Many times you secure your data in Excel and you do not have columns for Borrower Name, Full Name and FileAs name. You will always want to have the Full Name and FileAs name if you are importing contact data. If you are importing loan data, you will also want to make sure you have a column named Borrower Name.

The reason for that is each contact record inside WorkCenter has a tab reflecting the contact's loans. If you do not include a Borrower name in the import data, that field will be blank.

Step #1: Name the column headings in line 1 in your Excel spreadsheet with the appropriate name. For this flash video, we will use a very basic excel spreadsheet with a few columns of Contact and loan data.

Step #2: In case you do not have columns for Contact Full Name, Contact FileAs and Borrower Name if you are importing loan data, you will need to insert these columns into the Excel spreadsheet. As you can see with our test Excel spreadsheet we do not have any of the above mentioned columns included.

Step #3: Since we will be creating three columns, we will click on the column top line marked "A", hold your mouse down and highlight three columns to the right. Right click and select "Insert". You will notice we now have three new columns.

Step #4: Name the columns Contact Full Name; Contact FileAs; and Borrower Name. This test Excel spreadsheet does have contact first and last names. We will use these names to populate the new three columns with the appropriate data. This process is called "Concatenating" data.

Step #5: You will need to create formulas in the first line of the spreadsheet that will take data from the same line in a different column and add it to the new columns. Click in the first cell under "Contact Full Name and press the "=" key. Type this formula in the cell: =E2&" "&D2. This formula will take the information in column E row 2 and Column D row 2 and place that into the cell you have chosen. The reason we have selected the same row is it gives you the ability to copy the formula to the next cell down and it will automatically populate the correct data. As you can see, the cell under Contact Full Name has been completed showing that name.

Step #6: We will need to repeat the process for the Contact FileAs field. This time, we want to show the last name, first name in this box. Click into Column 2 row 2 and press the "=" key. Type the following in this cell: =D2&" "&E2 and press the "enter key" on your keyboard. You will see the fileAs information populate.

Step #7: Click into Column C row two and hit the "=" key. You will now need to create the same formula as you did in Step #5 to create the Borrower Name information. That formula is: =E2&" "&D2 and press the enter key.

You now have created formulas that populate all three columns with appropriate data. The last step is to copy the data cell formulas in Row 2 Columns A, B and C to all of the cells under these columns.

Step #8: Click and hold down your mouse on Row 2 Column "A" and drag it to Column "C". Once the cells are highlighted, right click on the highlighted area and select "copy". Click and hold your mouse into

Row 3 Column “A” and drag that to the bottom of your spreadsheet data. Once highlighted, right click and select “paste”. You will notice all rows of your spreadsheet are now populated with the appropriate data. There are also several pages addressing this procedure in the WorkCenter Quick Start Guide.

If you do not wish to prepare you Excel spreadsheet, you can call vForms and we will do that for a small tech fee. Your spreadsheet is now available to import into WorkCenter.