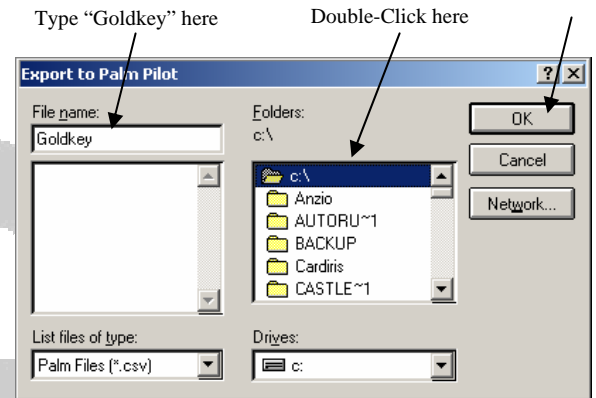


IDM FARM MANAGER EXPORTING DATA FROM GOLDKEY

Note: The export feature in Goldkey only allows certain data to be exported. You will only get names, addresses and phone numbers using the method below. If you require other data such as property characteristics (the “notes” field cannot be exported) please contact Rick Westergart at 909.384.7960 for more information.

1. Open your Goldkey software and open the Farm Database or Contacts that you will be exporting.
2. Click “File”; Click “Export To Palm Pilot” or “Export Contact To Palm Pilot” (the Palm Pilot export will create the desired CSV format)
3. In the Export to Palm Pilot window “Double-Click” on the “C:\” then Type the File name: “Goldkey”
4. Click “OK”



IMPORTING GOLDKEY DATA TO IDM FARM MANAGER

1. Open your IDM Farm Manager Software and open the Contacts Module
2. Click File; Click “Import Contact Information” Click “Yes”
3. Click the “Select File” button
4. Click the “Look in:” drop down button and click on “Local Disk (C:)”
5. Click on the Goldkey.CSV file and then click Open (You may need to scroll to the right to see the file)
6. Click “Load” and then click GoldkeySiteMain.CTI or GoldkeyMailMain.CTI and Click “Open” (*See Template Notes Below*)
7. Click the button “Set Defaults”
8. In the “Farm Name” box type anything you wish that describes the data you are importing. i.e. Past Clients, Prospects, Sphere, Farm Name Etc.
9. Click “Import”; Click “Yes”



IMPORTANT TEMPLATE NOTES:

If the data you exported from Goldkey contains only one address (Site or Mail) be sure to select the template that will import that address data to the primary address field. If the data was in the site address fields in Goldkey then select GoldkeySiteMain.CTI or if the data was in the mail address fields select GoldkeyMailMain.CTI.

If the data you exported has both site and mailing addresses choose the best template described below:
The GoldkeySiteMain.CTI template will place the site address as the primary address in IDM Farm Manager, the mailing address will be imported as the second address.

The GoldkeyMailMain.CTI template will place the mail address as the primary address in IDM Farm Manager, the site address will be imported as the second address. The IDM Farm Manager software uses the “primary” address for envelopes, labels and mail merge.

The Goldkey Templates are available to download at www.ChicagoTitleConnection.com/IDMFm.htm