

IDM Farm Manager Importing Update Farms

Importing an Update Farm

1. Back up your data. (Refer to the Training Essentials CD-Rom)
2. Order your Update Farm (see “IDM Farm Manager Ordering Farms”)
3. Open the IDM Farm Manager program and open the Contact Module
4. Click the “File” menu and then click “Import Contact Information”
5. Click “Yes”, Click “Select File” and locate your Farm Update (Usually your “A:” drive).
6. Click “Load”, Click the “Dataquick_Import_Chicago Title.cti” template, Click “Open”
7. Click “Set Defaults” for “Source” type “Chicago Title Update” for “Farm Name” type the same farm name you used for your original farm, Check the box “Data has initial header record”, Click “OK”
8. Click “Import”, Click “Yes”
9. Close the Contact Module and the re-open it.
10. Filter your farm using the Group feature (see “IDM Farm Manager Create a Group” help sheet for more information).
11. Click the “View” menu and click “Lookup”
12. Look at the “Address” column and find any duplicate addresses. When you find a duplicate address double-click on the top record of the duplicate.
13. Click the “Edit” menu and then click “Delete Contact” (**DO NOT** click “Delete Selected Contacts”).
14. Repeat steps 11 and 12 for all duplicate records

*An alternative method to this is to order your “Update Farm” on paper and just manually type in the new owners name and transfer information. Just filter the farm using the group feature and then click the “View” menu and then “Lookup”. Find the record you want to change and double click it. Make the desired changes and click “Save”. Repeat for each updated record.

Replacing your entire farm with an Update

*If you would prefer to replace your entire farm rather than update just the new updated “sold” properties follow these steps.

Note: All notes and history of activities will be lost for the entire farm if you use this method.

1. Re-order your farm exactly as you originally ordered it.
2. Open the program and open the Contact Module.
3. Filter your farm using the Group feature (see “IDM Farm Manager Create a Group” help sheet for more information).
4. Click the “Edit” menu and then Click “Delete Selected Contacts”.
5. Close the Contact Module and then Import your new update Farm as usual (see “IDM Farm Manager Data Import” help sheet for more information).



CHICAGO TITLE