

IDM FARM MANAGER EXPORTING FROM OUTLOOK

1. Open your Contacts in Outlook
2. Click File; Click “Import and Export”
3. Choose “Export to a file”; Click Next
4. Choose “Comma separated Values (Windows)”; Click Next
5. Choose Contacts folder; Click Next
6. Click Browse; Click “My Documents” on the left panel, Type “outlookdata.csv” in the file name box; click OK
7. Click Finish

IMPORTING OUTLOOK DATA TO IDM FARM MANAGER

1. Open Contacts Module
2. Click File; Click “Import Contact Information” Click “Yes”
3. Click the “Select File” button
4. Click “My Documents” on the left panel; Click on the file “outlookdata.csv” (You may need to “scroll” to the right to see the file)
5. Click Open
6. Click “First Name” on the left column under “Field Data”
7. Click the “Map Field” button; Click “First Name”; Click OK
8. Continue steps 6 and 7 for any other fields you want to Import. For all other fields just leave as “Ignore”
9. Click the button “Set Defaults”
10. In the “Source” box type “Outlook Data”; In the “Farm Name” box type anything you wish that describes the data you are importing. i.e. Past Clients, Prospects, Sphere Etc.; Check the box “Data has initial header record”; Click OK
11. Click “Import”; Click “Yes”

NOTE: When “Mapping” your fields it may be helpful to click the “Next Record” button so you can see the actual data and the data formatting to help you choose which field to match it to.

