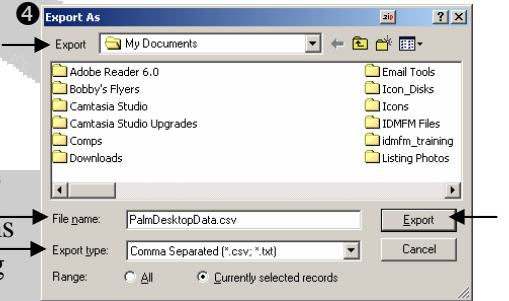
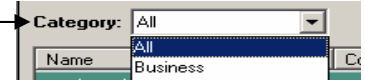


# IDM FARM MANAGER

## EXPORTING DATA FROM PALM DESKTOP

1. Open your Palm Desktop software and click on the “Address” button on the left pane
2. Click the drop down arrow for “Category” and select a specific group of records to export *or* select “All” to export all records.
3. Click “File”; Click “Export”
4. In the Export drop down select “My Documents” then Type the File name: “PalmDesktopData” and Change the “Export type:” to “Comma Separated [\*.csv; \*.txt]”
5. Click “Export”
6. In the Specify Export Fields dialog box unselect “Title” and then scroll down the list and unselect all of the items below “Zip”. Note: If you created your own fields using the “Custom” fields you may leave them checked.
7. Click OK; Click OK



## IMPORTING PALM DESKTOP 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 “My Documents” on the left panel; Click on the file “PalmDesktopData.csv” (You may need to “scroll” to the right to see the file)
5. Click Open
6. Click “Load” Select Palm\_Desktop\_Import.CTI and Click “Open” (*See Notes Below*)
7. Click the button “Set Defaults”
8. In the “Source” box type “Palm Desktop Data”; In the “Farm Name” box type anything you wish that describes the data you are importing. i.e. Past Clients, Prospects, Sphere Etc. (If you are importing a specific Palm category, type that category name here)
9. Click “Import”; Click “Yes”



### **IMPORTANT NOTE:**

Because of the vast possibilities of custom options available both in the Palm Desktop and IDM Farm Manager Software these instructions should be used as a guideline if you have customized the fields in your software. Some slight modifications may be necessary to correctly line up the data fields. [Please view the “Palm Desktop Import” training video at the web site listed below for further help.](#)

### **TEMPLATE NOTE:**

The Palm Desktop Template is available as a download at [www.ChicagoTitleConnection.com/IDMFm.htm](http://www.ChicagoTitleConnection.com/IDMFm.htm) This template provided will not work correctly if you don't follow these instructions exactly. It may fail to load or may not line up the data correctly if you use custom fields or if you exported different fields than what are set out in this document.