


# Exporting Contact Info to the Palm Pilot® or Handspring Visor®

## Step 1:

### Exporting From Servant Keeper®

1. Open Membership Pro
2. Click the **"Groups Keeper"** button from the toolbar 
3. Decide which group you want to use for the export and double-click on it.
4. Click on the **"Advanced"** button at the bottom of the screen and click **"Export Results"** and choose **"ASCII File"**
5. In the **"Export Results to"** dialog window in the **"Save in:"** field, use the drop down arrow to choose the location that you want to save your file.
6. Next name the export file in the **"File name:"** field. And click the **"Save"** button to save the export to the selected location.

## Step 2:

### Importing With Palm Desktop® software

1. Click the **"Address"**.
2. Click **"File" | "Import"**.
3. In the next window, choose the location where you saved the export file from step 1.
4. In the **"Files of Type:"** field choose "Comma Delimited .csv or .txt"
5. Double-click your export file.
6. The next window will be titled **"Specify Import File"**
  - a. On the left are the fields from the Palm Software and the right are those that you exported from SK.
  - b. Align the fields on the left with their corresponding field on the right.
  - c. Be sure to remove the check mark from any field that does not have a corresponding Servant Keeper field.
  - d. When finished, click the "OK" button twice.
7. Sync your palm with the desktop and you are done!

### Importing With Microsoft Outlook®

1. Go to the **"File"** menu and choose **"Import and Export"**.
2. In the "import and Export Wizard" window choose **"Import from other program or file"**.
3. Click **"Next"**.
4. In the **"Import a File"** click **"Comma separated values (Windows)"** and click **"Next"**.
5. Click on the **"Browse"** button.
6. Browse to the folder where you saved your export file exported from Servant Keeper and double-click the file.
7. Click **"Next"**
8. Under **"Select a destination folder"** choose **"Contacts"** and then click **"Next"**
9. Click on the **"Map Custom Fields"** button.
10. From the column on the left, drag each field you want to map to the field name in the right hand column you want to map it to. Repeat this step until all fields are mapped that you want to import.
11. Click on **"OK"**
12. Click **"Finish"** to start the import. Depending on the size of the import file and how many fields you mapped this import process may take a minute.
13. Sync your handheld device with Outlook and you are done!