

Using the Rosemark Contacts plugin for Outlook 2007

This simple plugin pulls in a list of Clients, Caregivers, Referrers or Customers that you have exported from Rosemark and creates an Outlook address book from their contact information.

Remember that this is not intended to be a full Outlook syncing module: changes you make in Outlook DO NOT come back to Rosemark!

Installing the Plugin

You can download the plugin from a link on the bottom of the Downloads page (here's a direct link). Download it, unzip it and run the setup.exe file there.

This will put a new item in the Outlook Tools menu called Import Rosemark Contacts.

Using the Plugin

Once that's in place, here's how you can use it (using Clients as an example):

- 1) In Rosemark, go to File->Export to spreadsheet->Clients.
- 2) Open the resulting clients.csv file in Excel. Sort and edit to remove all but the Active ones (if desired). Save the csv file.
- 3) In Outlook, click on Tools->Import Rosemark Contacts. It will ask you to browse for the file to import; select the clients.csv file mentioned above.
- 4) Go to Outlooks Contacts; you should now see a new address book called "Rosemark Clients"

Remember that, the next time you do this, that address book will be replaced (not merged), so changes made there will not survive unless you drag contacts into another book (or rename the book itself).

If you have any difficulty with this, please give us a call at 734-662-3537.