CREATING EXPORT TEMPLATES

Rev. 20201015

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Overview

Exporting data from your DataTree list provides you with unlimited flexibility for merging your information into custom mail merge, your own multi-line reports, or for use in analytics. Included in the export functionality of DataTree is the ability to customize your output fields to exactly what you want providing you with a highly tailored export.

Order Export Options

Once you have created your list, click on the **Export** button at the top-right of the DataTree window.
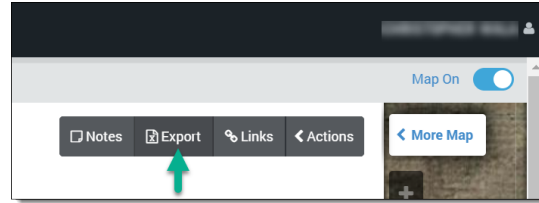
This will launch the Order Export dialog box providing you with options to export all records or just a range of records (1), save or use a custom export template (2-4), as well as the export format, case, and exported file name (5).

Basic Functionality:

Three primary and six secondary export options are available. Only one primary option can be selected per export. A primary option must be selected before any secondary options can be selected.

Primary

Mailing Label: This includes the essential fields necessary to create mailing labels through a mail merge, such as in Microsoft Word.

Property Characteristics: Includes all fields from the Mailing Label export and adds the fields with the Property Characteristics. See the Property Characteristics, Location Information, and the Tax Sections of the Property Detail report for the fields.

Property Detail: This export contains every field on the Property Detail Report. Essentially, includes everything in the first two options plus the balance of the fields from the Property Detail Report. As each of the first three lists builds on the previous, there is no need to select more than one.

Secondary

Finance Scores: Allows filtering by Purchase, Refi, and Equity Intel scores.

Foreclosure Detail: Allows filtering by default/foreclosure data including default and unpaid values, auction data, foreclosing institution, etc.

HOA Contact: Allows filtering by HOA information including contact location and fee collection.

HOA Lien: Allows filtering by HOA Lien information including recording data, lien holder, lien values, etc.

Open Lien: Allows filtering by voluntary lien information including lien position and mortgage holder data.

PACE Liens: Allows filtering by PACE lien information including lien values, recording data, etc.

Click on any arrow icon to the right of the filter to view the available fields. You may select fields individually or click the checkbox for the category to use all fields for that category. Once you've selected the appropriate fields, click **Order** to export your list.

Note: Chrome, Firefox and Internet Explorer all download files slightly differently. Please make sure to take note of where your browser saves downloaded files. If you are unsure check with your IT team or Helpdesk or call DataTree Client Services at 800-708-8463.

Managing Fields

When the existing export field layouts don't meet your needs, you can create your own layouts for quick retrieval.

To start, open the Order Export dialog box and expand one of the existing export layouts. You can select individual fields for the export by clicking in the checkbox (1) to the left of the field name.

Selecting the field will move the field to the right under **Selected Fields** (2).

If you need to remove the field, click in the **X** icon next to the field name (3).

To re-order the fields, click and drag on the name of the field to move it to a new location (4).
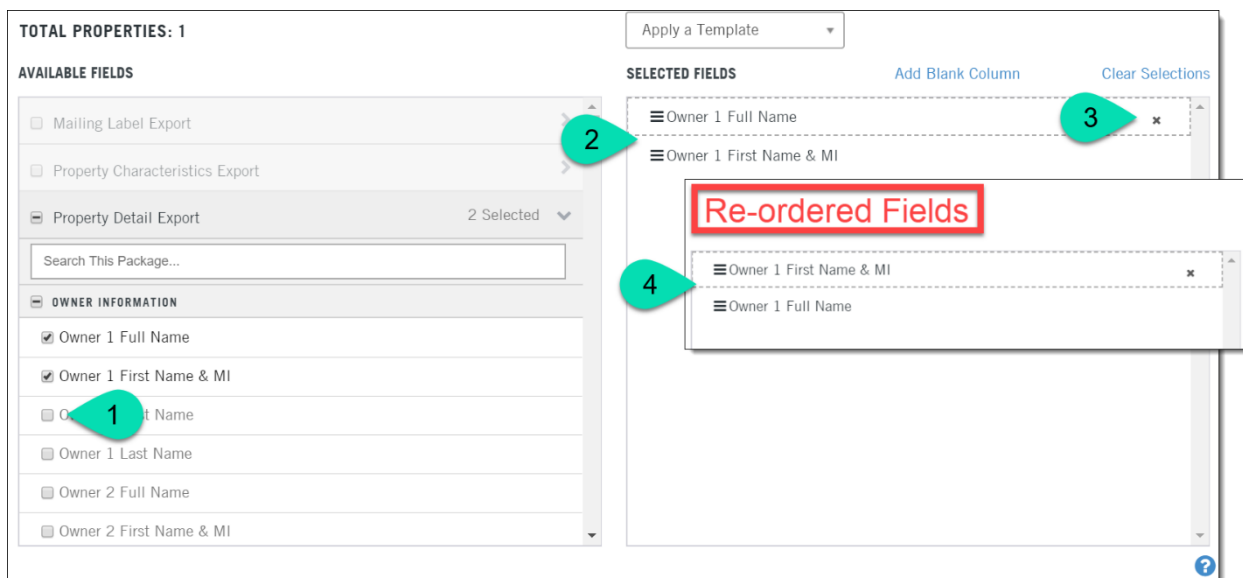
> *TIP*: *Using the Property Detail Export provides access to all available fields and works as a good method to build new exports.*

Saving Custom Templates

Once you have the fields you want, save and name your template by clicking on the **Save As Template** (1) link on the bottom-right corner of the Order Export dialog box. The Export Template Dialog Box will appear. Name your template and click **Save** (2). Click **Done** in the window that follows. The Order Export dialog box will then close.
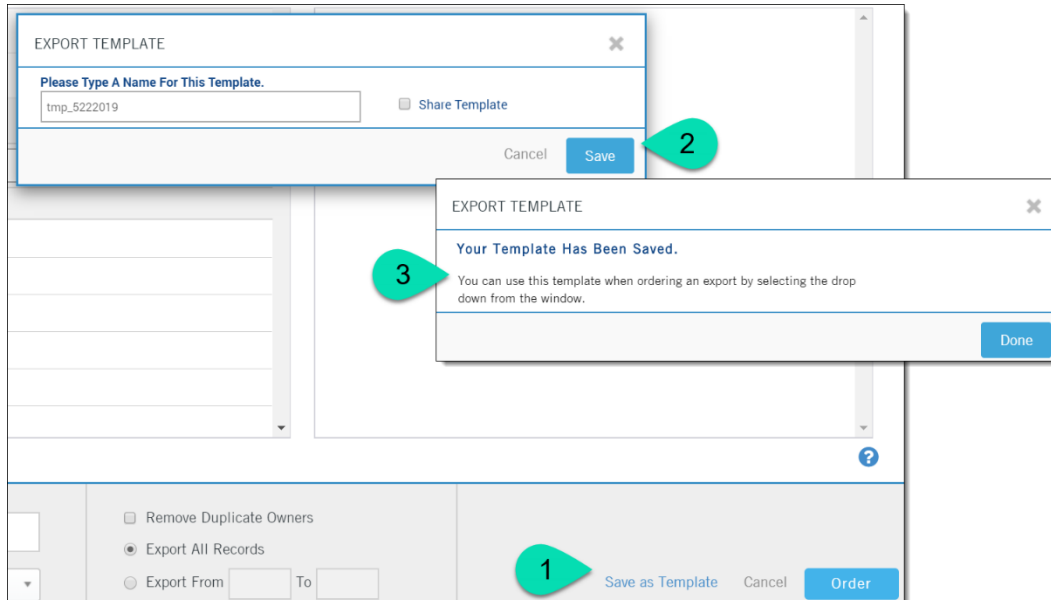

> *NOTE: The Template name field has a limit of 16 characters.*

Using Saved Templates

Once you save your template, you can recall them at any time from the **Apply a Template** dropdown selection list at the top-right corner of the Order Export window. If you have multiple templates saved, the drop selection will have a scroll bar. The saved fields will be populated into the **Selected Fields** pane.

Click Order at the bottom right to complete your export.
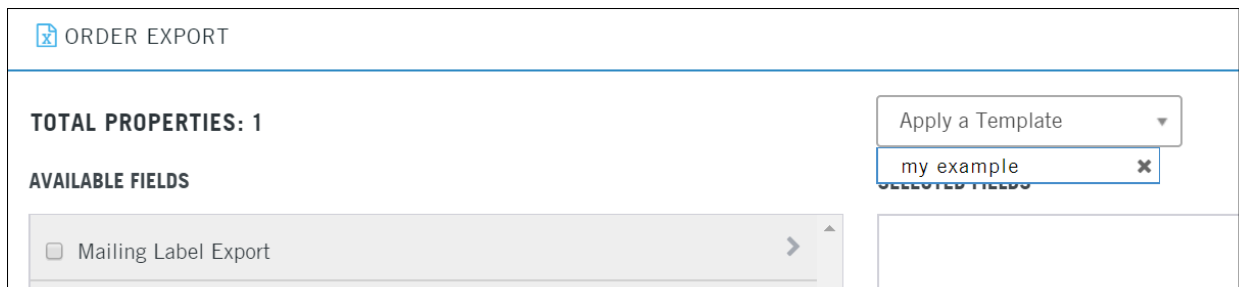
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Managing Templates

Adding or Removing Fields from an Existing Template

To modify an existing template, open a saved template, add any additional fields (or remove fields), and click the Save As Template button.

In the Export Template dialog box, simply enter the same name of the template you just modified to resave it and click Save.

You will receive the following confirmation. Click Yes to overwrite the original template.
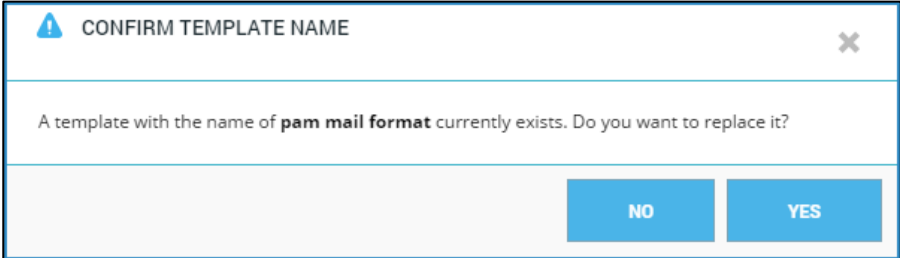
Changing the Field Order

To re-order the fields, simply place your mouse cursor on the field name (so the little hand shows up) and click and drag to move the field to a new location.

Deleting a Template

If you wish to delete a saved template, click the **X** icon to the right of the template name and confirm you action.