



TitleFlex
by Data Trace

CREATING FARMING EXPORT TEMPLATES

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Table of Contents

- Overview 2
- Order Export Options..... 3
- Basic Functionality: 3
- Creating an Export Template 5
- Saving Your Template 5
- Using Saved Templates 6
- Adding or Removing Fields from an Existing Template 6

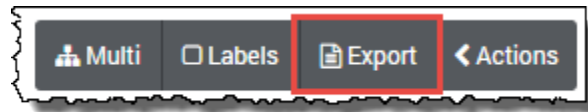
Overview

Exporting data from your TitleFlex 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 TitleFlex is the ability to customize your output fields to exactly what you want for a highly tailored export.

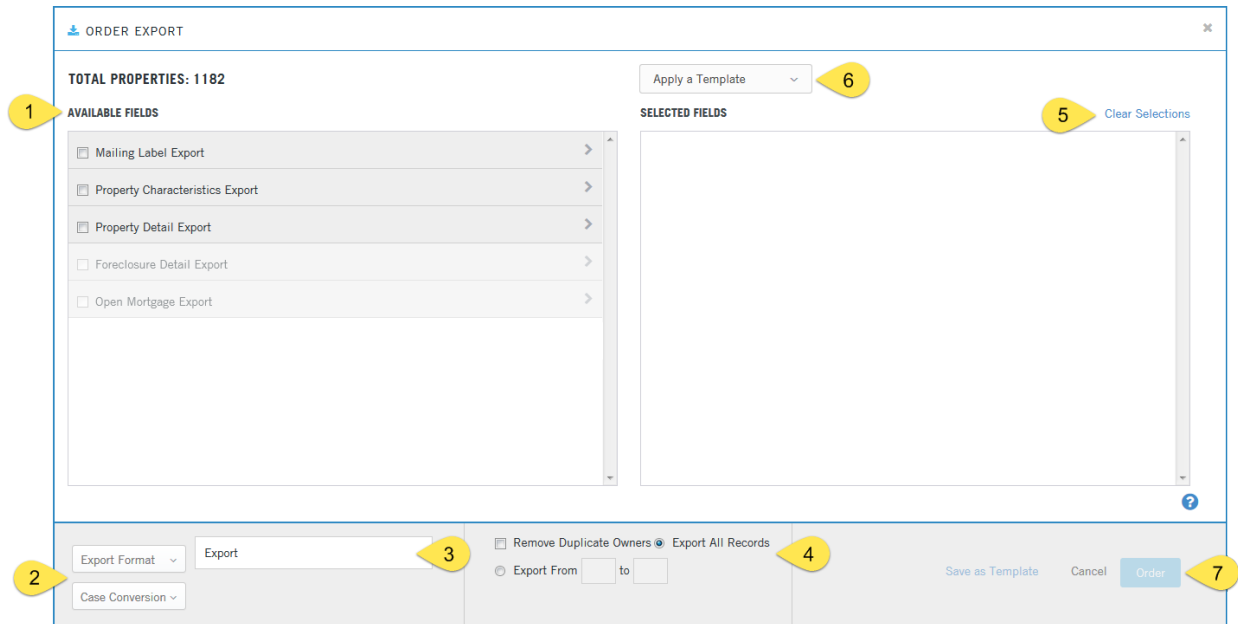
Note: Chrome, Firefox and Internet Explorer all download files slightly differently. Please make sure to take note of where your browser saves downloaded files. If you are unsure, check with your IT team or Helpdesk or call DataTree Client Services at 800-708-8463.

Order Export Options

Once you have created your list, click the Export button.



This will launch the Order Export dialog box providing you with field packages (1), export formats and case conversion (2), a field to name your exported file (3), deduplication and export record ranges (4), an option to clear and start over (5), a menu to use saved templates (6) and the order button (7).



Basic Functionality:

Five export options are available.

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.

Foreclosure Detail: No address information is in this export. It only contains the foreclosure information. One of the above exports must be included if you need address, owner, or property characteristics information.

Open Mortgage: Contains up to four open mortgages. Must be combined with the Mailing, Property Characteristics, or Property Detail export.

Click on arrow (1) to view the available fields in the package. You may select fields individually by clicking in the checkbox next to the field name. Click the checkbox next to the field package (3) to use all the fields in the export.

The image contains two screenshots of a software interface titled "AVAILABLE FIELDS".

The top screenshot shows a list of field packages under the heading "AVAILABLE FIELDS":

- Mailing Label Export
- Property Characteristics Export
- Property Detail Export

Below this list is a search box labeled "Search This Package...".

Underneath the search box is a section titled "OWNER INFORMATION" with the following items:

- Owner Status
- Owner Name 1 Full
- Owner 1 First Name & Mi
- Owner 1 Last Name
- Owner Name 2 Full
- Owner 2 First Name & Mi

Callouts in the top screenshot:

- 1: Points to a downward arrow next to "Property Detail Export".
- 2: Points to the checked checkbox next to "Owner Name 1 Full".
- 3: Points to the checkbox next to "Property Detail Export".
- 4: Points to the search box.

The bottom screenshot shows the expanded view for "Property Detail Export". It has a search box containing the text "add".

Below the search box are three sections:

- SITUS ADDRESS**
 - Situs Street Address
 - Situs Full Address
- MAILING ADDRESS**
 - Mailing Street Address
 - Mailing Full Address
- PROPERTY CHARACTERISTICS**
 - Addition Area

Callout 5 points to the search box.

If you are searching for a particular field, type the first few letters into the Search This Package (4) text box and the Order Export will suggest options (5).

Creating an Export Template

If you routinely use a set of fields, you can save your layouts for quick retrieval.

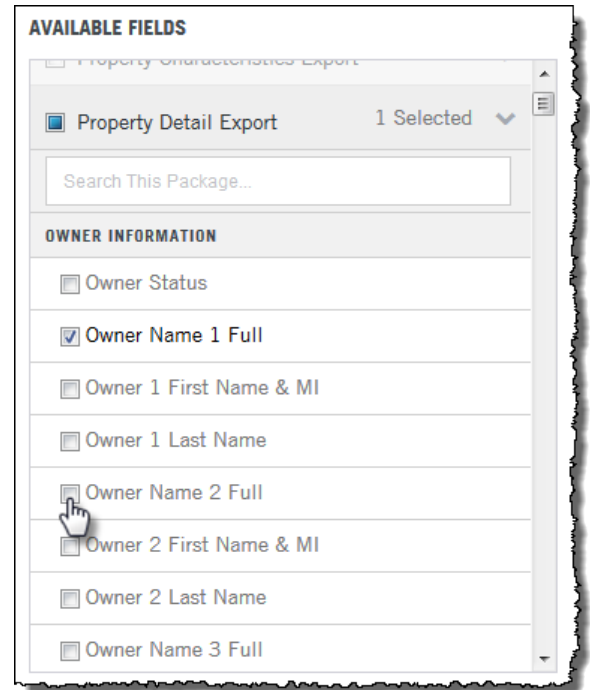
To start, open the Order Export dialog box and expand one of the existing export layouts.

Select the fields by clicking in the checkbox to the left of the field name. Selecting the field will move the field to the right under Selected Fields.

TIP: Use the Property Detail Export as it has all available fields. You can also add fields from Foreclosure or Mortgage packages

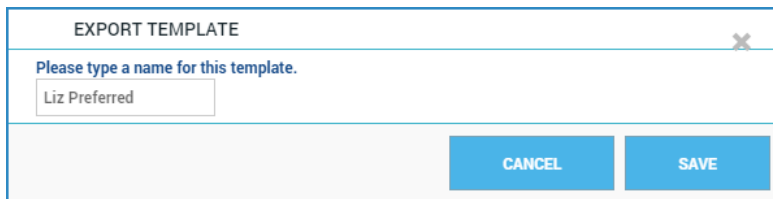
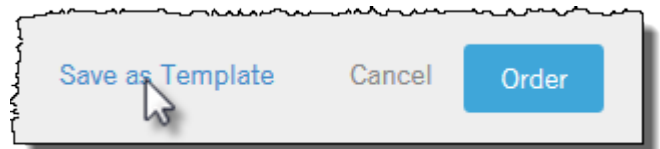
If you need to remove the field, simply click in the checkbox next to the field name.

To re-order the fields, click and drag on the name of the field in the Selected Fields section to move it to a new location (hover the mouse over the field name and a little hand will appear).

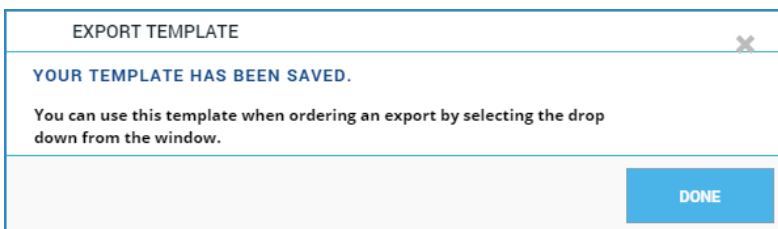


Saving Your Template

Once you have the fields you want, save and name your template by clicking on the Save As Template button on the bottom right hand corner of the Order Export dialog box.



The Export Template Dialog Box will appear. Name your template and click Save. The Template name field has a limit of 16 characters. Do not use punctuation.

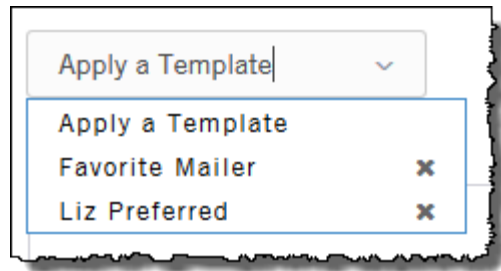


You will receive the following confirmation. Click DONE. The Order Export dialog box will close.

Using Saved Templates

Once you save your template, you can recall them at any time, from the “Apply a Template” drop selection list at the top of the Order Export dialog.

If you have multiple templates saved, the drop selection will have a scroll bar. Simply click on the template you would like to use.



The saved fields will populate into the Selected Fields on the right hand pane. Click Order at the bottom right to complete your export.

Click the x to the right of the template name to delete a template. Confirm the deletion.

Adding or Removing Fields from an Existing Template

To modify an existing template, open a saved template, add or remove fields, change the field order, 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.

