Innovations to GO BEYOND

TITLE DATA and AUTOMATION
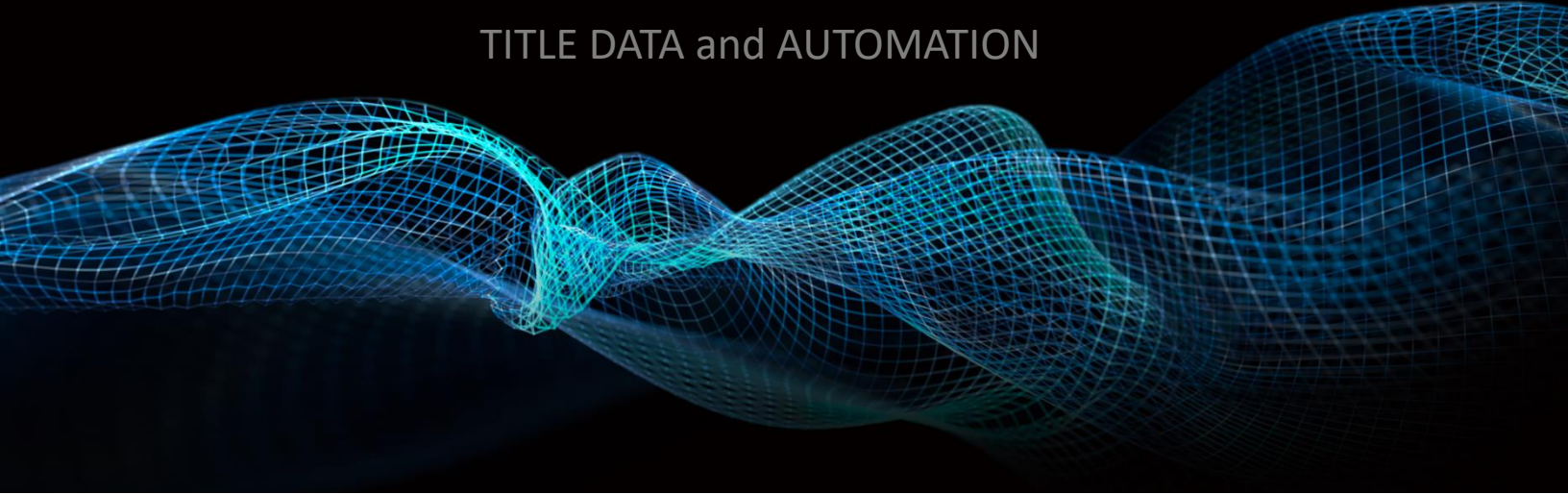
CREATING EXPORT

TEMPLATES

Rev. 201904

TitleFlex™
by DataTrace®

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 providing you with a highly tailored export.

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

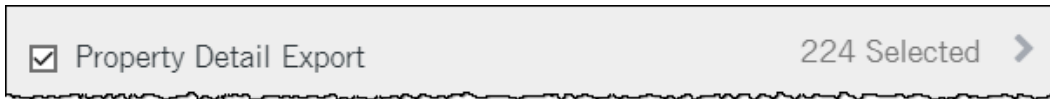Once you have created your list, click on the Export button in the Action Bar located at the top right of your list.
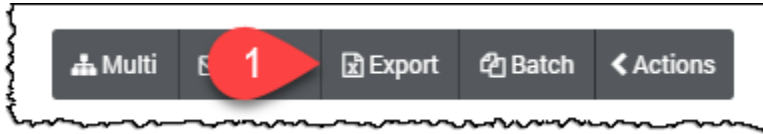

This will open the Order Export dialog box.

Basic Functionality:

Selecting Fields

You can select all the fields in a given export by clicking the check box next to the export name.

Alternatively, you can search for and select specific fields by clicking the arrow (2) at the right of the export name to expand the list and scrolling (3) or entering (4) the field name to filter the list to find the field you want to add. Click the checkbox next to that field name (5) to add it to the export list.
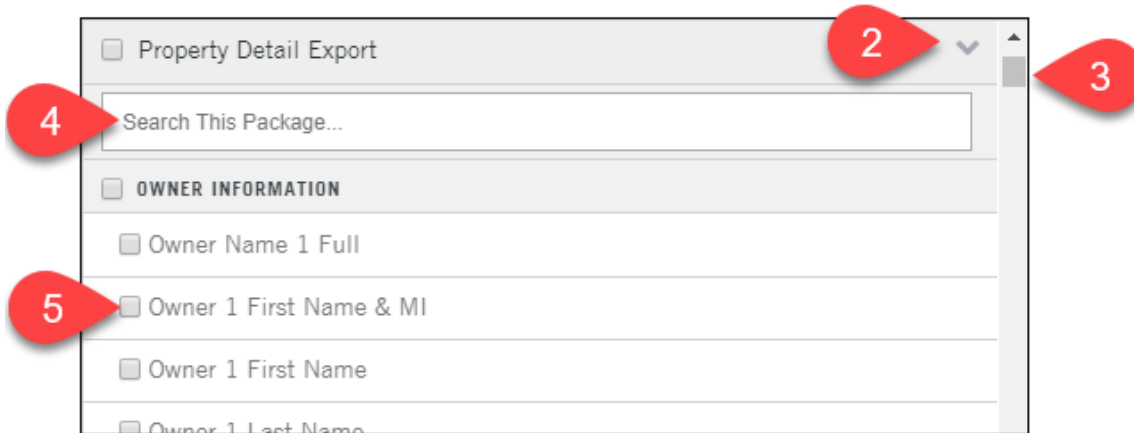
Export Definitions (6):

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.

Add-On Exports (7): One of the three above exports must be selected to use the Add-On Export. These do not contain any address or owner information.

Financial Scores: These are the Purchase, Refi, and Equity propensity scores found in the Advanced Filters.

Foreclosure Detail: No address information is provided 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.

HOA Contact: Up to three HOAs will be listed, including the contact information and monthly amounts.

HOA Lien: Up to three HOA liens will be listed, including information on the trustee, if applicable, and the default amount.

Open Lien: Includes options for exporting up to four open liens. Includes the document number, loan information, and lender, where available.

PACE Lien: Includes information on PACE Liens including amounts, rates, agency and other information.

Setting up your fields

Selecting all, one or some of the fields (8) from your export options will move the fields to the Selected Fields section (9) of the dialog box.
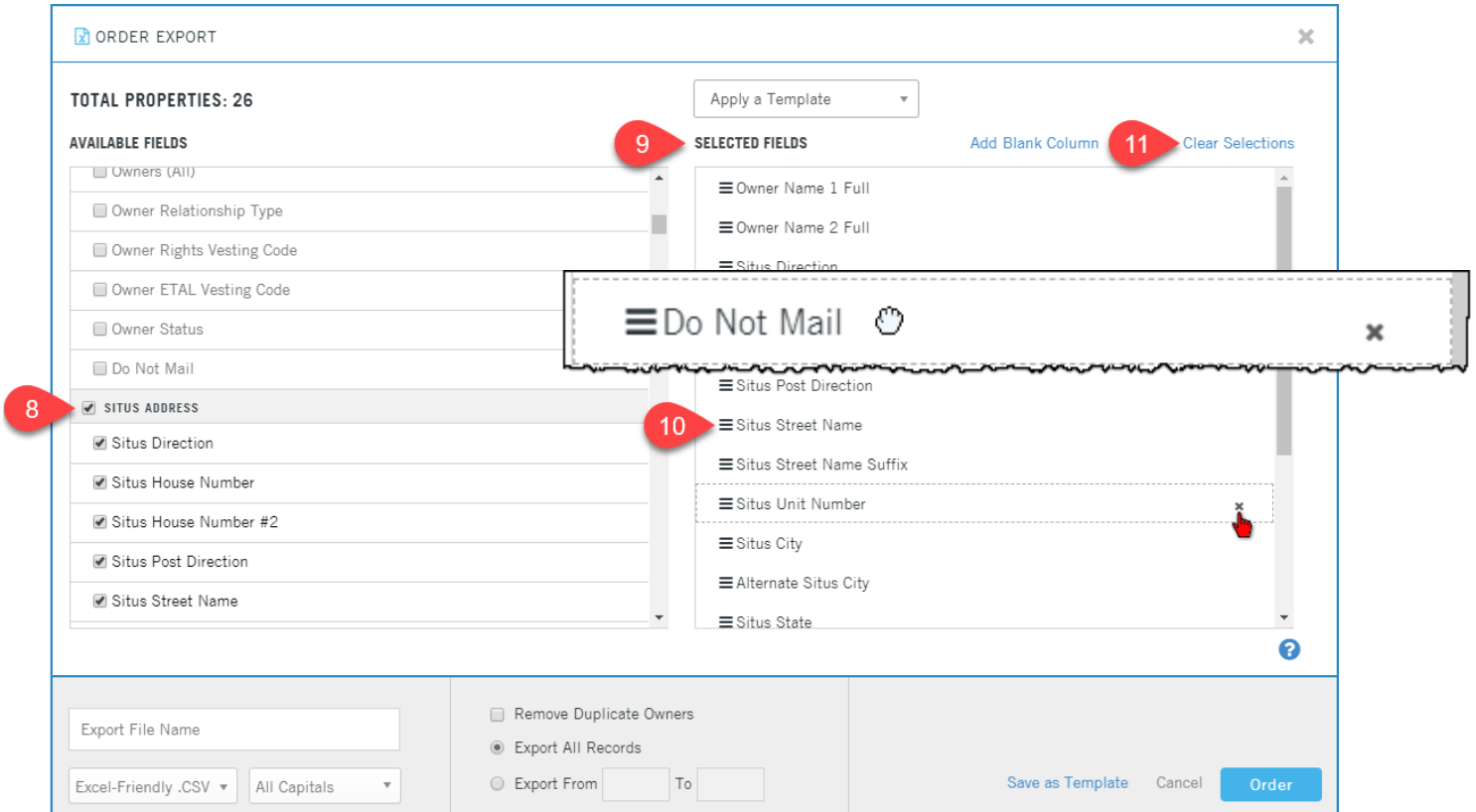
To move or remove a field (10) simply hover your mouse over the field until the hand appears. Click and drag the field to relocate it in your list. Click the "x" to remove the field from your list.

To remove all fields and start over click the Clear Selections link at the top right (11).

Saving Your Template and Exporting Records

Once you have the fields you want, name your template and click the Save As Template link (11). The Export Template Dialog Box will appear. Name your template and click Save. You will receive the following confirmation. Click DONE. The Order Export dialog box will close.

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

Make sure to name your file and select the file format (12). Additional options include removing duplicates and exporting all or a range of records (13). Click Order (14) when you are ready to export your list.

Using Saved Templates

Once you save your template, you can reuse them by selecting the Apply a Template drop down list. 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 be populated into the Fields to Export on the right hand pane.
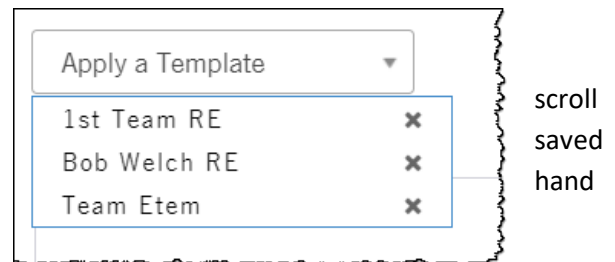
Click Order at the bottom right to complete your export.

Modifying 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 a confirmation that you wish to overwrite the original template. Click Yes.

Deleting a Template

If you wish to delete a saved template, click the "x" to the right of the template name and confirm you action.