

Create and Edit Custom Exports in Matrix

Create or edit a custom CSV export in Matrix under Settings, then download selected listings with the fields you chose.

Create or edit a custom export

1. Open the Utility Menu (look for [Hello, Your Name] at the top right). Select Settings > Custom Exports.
2. Choose the class at the top (Property for listing exports, or Member when needed).
3. Select Add Export to create one, or select an existing export and select Edit Export.
4. Enter an Export Name.
5. Under Available Fields, select the fields you want, then select Add-> to move them into Export Fields. Use <-Remove, Up, and Down as needed. Use Search to find a field.
6. Under Include Column Names, choose None, Label, or Name.
7. Under Separator, choose Comma (CSV - fields separated by commas) or Tab (fields separated by tabs).
8. Select Save.
9. On Manage Custom Exports, select Done when you are finished.

To run an export, complete a search, check the listings you want, select Export, choose your custom export, and export the file. See Search for Listings in Matrix.

Tips

- You can export a maximum of 100 listings at one time, and up to 1,000 listings per month.
- On Manage Custom Exports you can also Copy Export or Delete Export.
- Custom Exports download listing data as a file. For on-screen result columns, see Create and Edit Custom Single-Line Displays in Matrix.

Source: <https://support.itsosystems.ca/kb/115>