

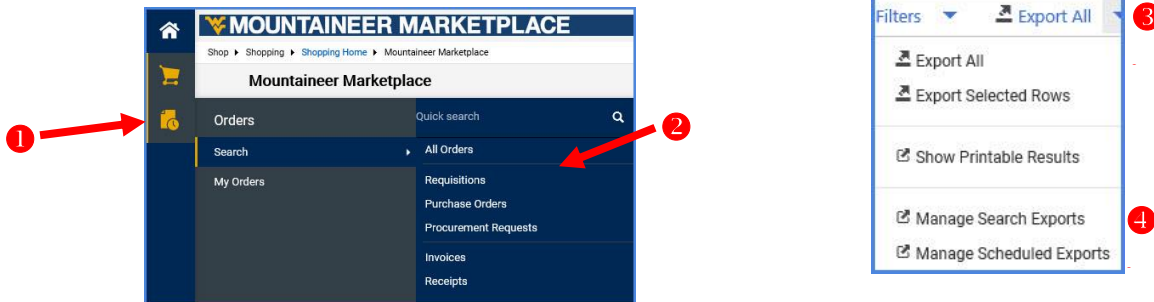
Create and Manage Export Templates

Set up templates enabling you to export only the information you need.

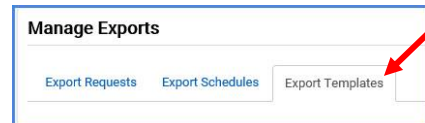
Creating the Template

1. Access Mountaineer Marketplace.

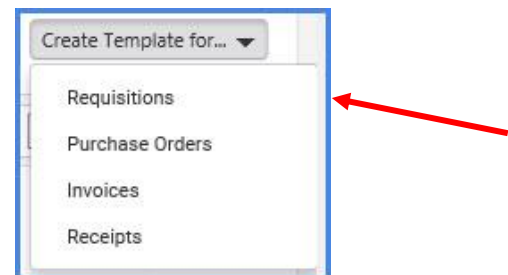
2. In the upper left corner icon panel in Mountaineer Marketplace,
- 1) Click the Orders icon.
 - 2) In the flyout menu, choose the type of document to search.
 - 3) After documents have been retrieved, click the **Export All** dropdown arrow in the upper right corner.
 - 4) Choose **Manage Search Exports**.



3. Choose **Export Templates**.



4. Click the dropdown menu for **Create Template for** and choose the type of document for which you want to establish a template.



5. Choose what your template will contain.
- **How do you want your custom export file?**
Recommended: All in one file
 - **Which Custom Fields do you want?**
Recommended: Let me choose
 - Click **Next**.

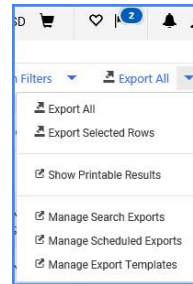
6. Check the box for each system field you want to retrieve for your exports.
- Click **Next** at the bottom of the screen.

7. Give the template a name and click the **Submit** button.

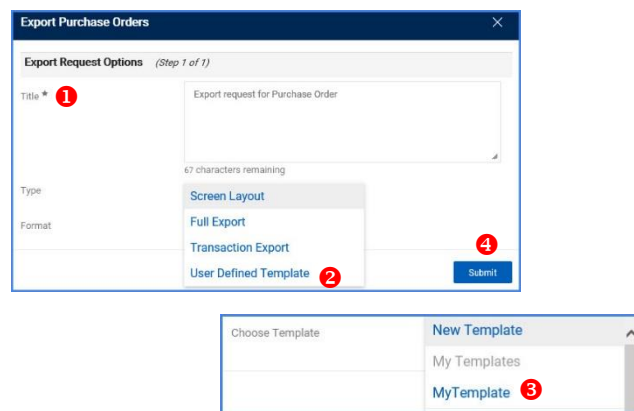
8. The template has been created. From the Template Edit menu, you can edit, copy, delete, and share a template.

Applying the template to a search

1. Run a search. After the results appear, click the Export All dropdown and choose Export All or Export Selected Rows.



2. Export Request Options:
 1) Name the export, if desired.
 2) From the **Type** dropdown, click **User Defined Template**.
 3) From the **Choose Template** dropdown, choose the template you want to apply.
 4) Click **Submit**.



3. A success message appears. Click **Manage Search Exports**.

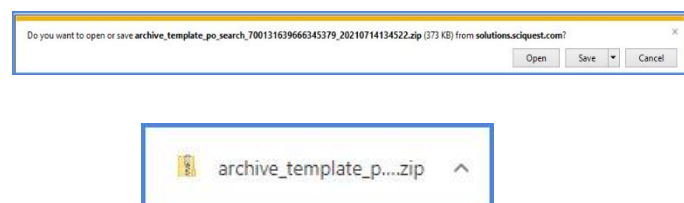


4. When the export status shows **Completed**, click the name of the file in the Title column.



5. Depending on your browser, you may see either:

- A choice to open, save, or cancel.
- A downloaded zip file at the bottom of your screen. After clicking it, you will need to extract the contents from the zipped file.



6. The spreadsheet shows only the fields you chose in [step 6](#) in the *Creating the Template* section.

	A	B	D	E	F
1	PO #	Creation Date	PO Total	Quantity	Supplier Name
2	MM000361646	7/14/2021	5400	1	CVENT INC
3	MM000361637	7/14/2021	10363	8	METER GROUP INC USA
4	MM000361637	7/14/2021	10363	32	METER GROUP INC USA
5	MM000361637	7/14/2021	10363	1	METER GROUP INC USA