Extracting a CSV (Comma Separated Value) File

You can extract data from Expert to create a standard .csv file for import into a CRM program or spreadsheet. You can extract information from to a range of deals determined by specific criteria, or you can extract information related to the deal you are working on.

Note: Extracting a CSV file is an optional tool that must be requested by your firm.

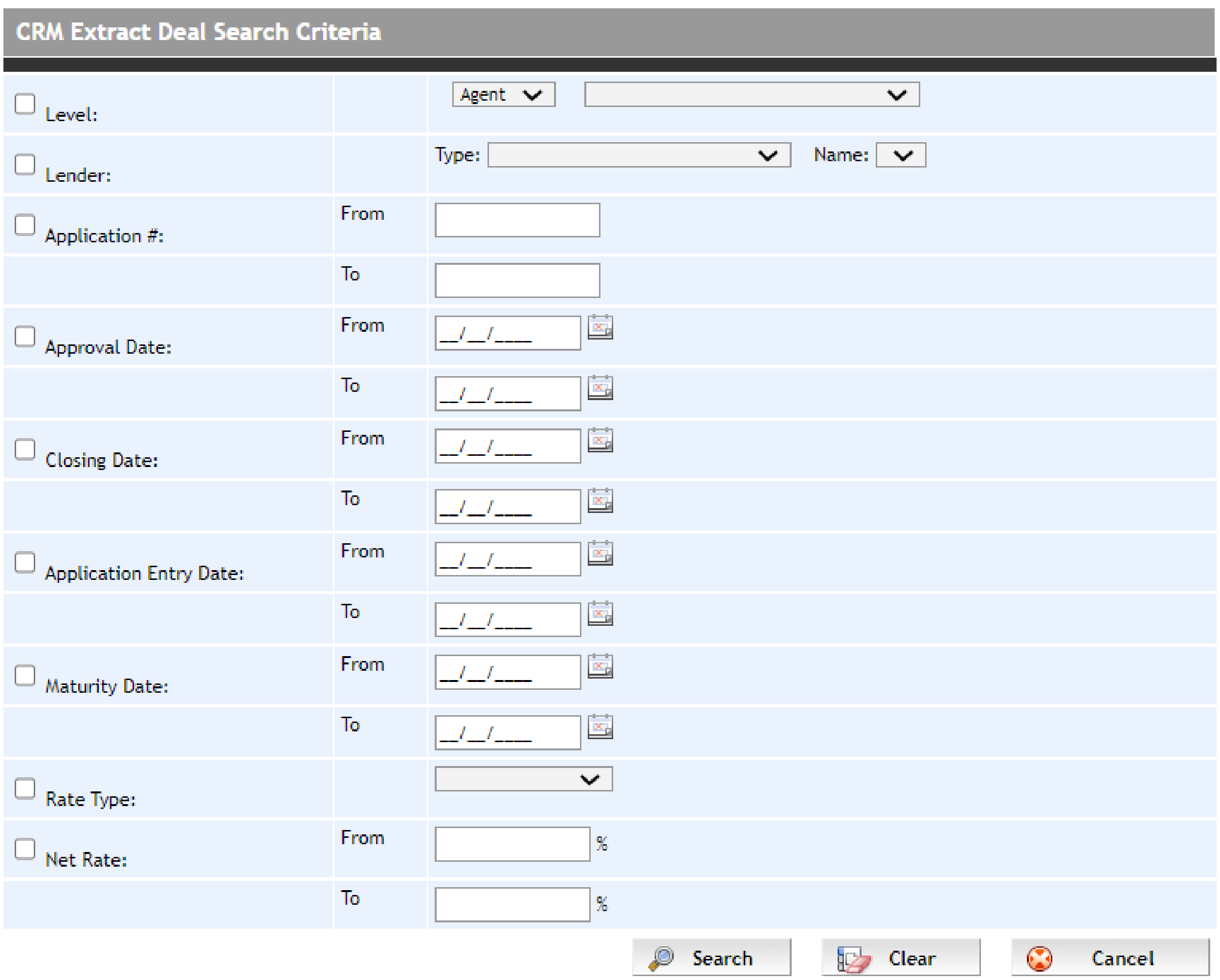
[Extracting Data from a Range of Deals:](#)
[Extracting Data from the Deal you are Working On:](#)

Extracting Data from a Range of Deals:

Extracting data from a range of deals is done via the Tools menu. Complete the following steps:

1. Click the **Tools** menu. The Financial Tools screen appears.

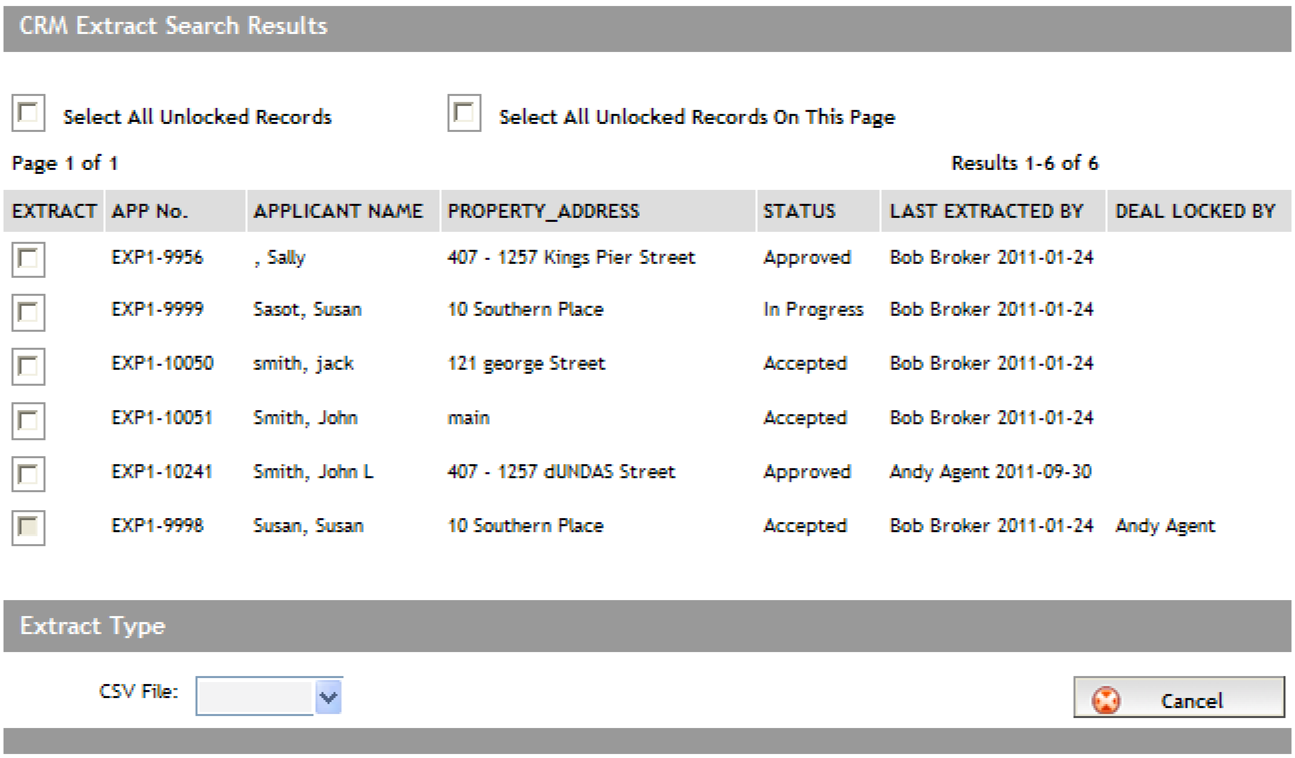
2. Click the **Extract to CRM** link. The CRM Extract Deal Search Criteria screen appears.



3. Enter your search criteria:

   Level - allows you to specify which user/subset of users you wish to include in the extract
   Lender Name - select a Lender from the dropdown
   Application # - complete From and To criteria
   Approval Date - complete From and To criteria
   Closing Date - complete From and To criteria
   Application Entry Date - complete From and To criteria
   Maturity Date - complete From and To criteria
   Rate Type - select a Rate Type from the dropdown
   Net Rate - complete From and To criteria

4. Click **Search** to display the results.


CRM Extract Search Results

Select All Unlocked Records   Select All Unlocked Records On This Page

Page 1 of 1   Results 1-6 of 6

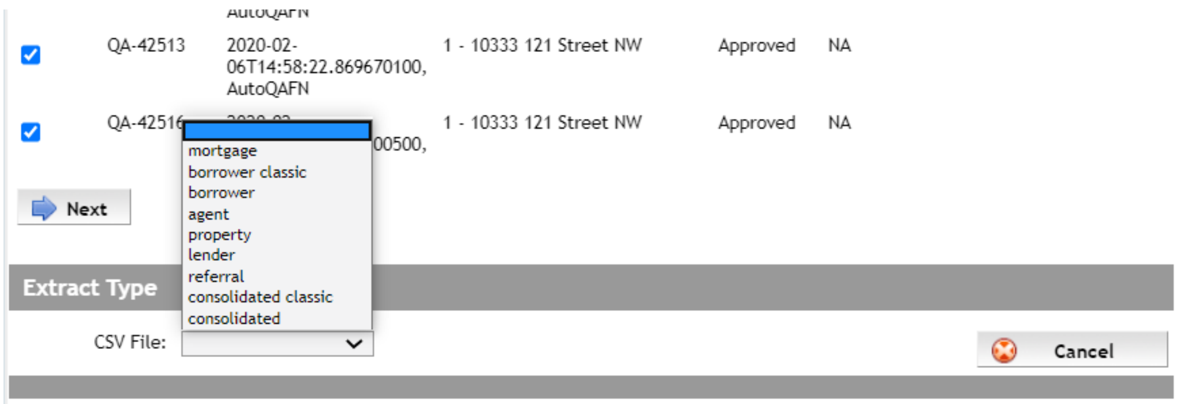
EXTRACT	APP No.	APPLICANT NAME	PROPERTY_ADDRESS	STATUS	LAST EXTRACTED BY	DEAL LOCKED BY
	EXP1-9956	, Sally	407 - 1257 Kings Pier Street	Approved	Bob Broker 2011-01-24	
	EXP1-9999	Sasot, Susan	10 Southern Place	In Progress	Bob Broker 2011-01-24	
	EXP1-10050	smith, jack	121 george Street	Accepted	Bob Broker 2011-01-24	
	EXP1-10051	Smith, John	main	Accepted	Bob Broker 2011-01-24	
	EXP1-10241	Smith, John L	407 - 1257 dUNDAS Street	Approved	Andy Agent 2011-09-30	
	EXP1-9998	Susan, Susan	10 Southern Place	Accepted	Bob Broker 2011-01-24	Andy Agent

Extract Type

CSV File: Cancel

5. Select the deals(s) that you want in the extraction file. To select all records, select the **Select All Unlocked Records** checkbox. To select only the records on the page, select the **Select All Unlocked Records On This Page** checkbox.

6. From the **CSV File** dropdown box, select the type of information to be extracted.



Note: The **'classic'** options for both **borrower** and **consolidated** types exclude newly added elements to these CSVs.

7. Expert creates the file in the background. Click **OK** to the confirmation message that appears.

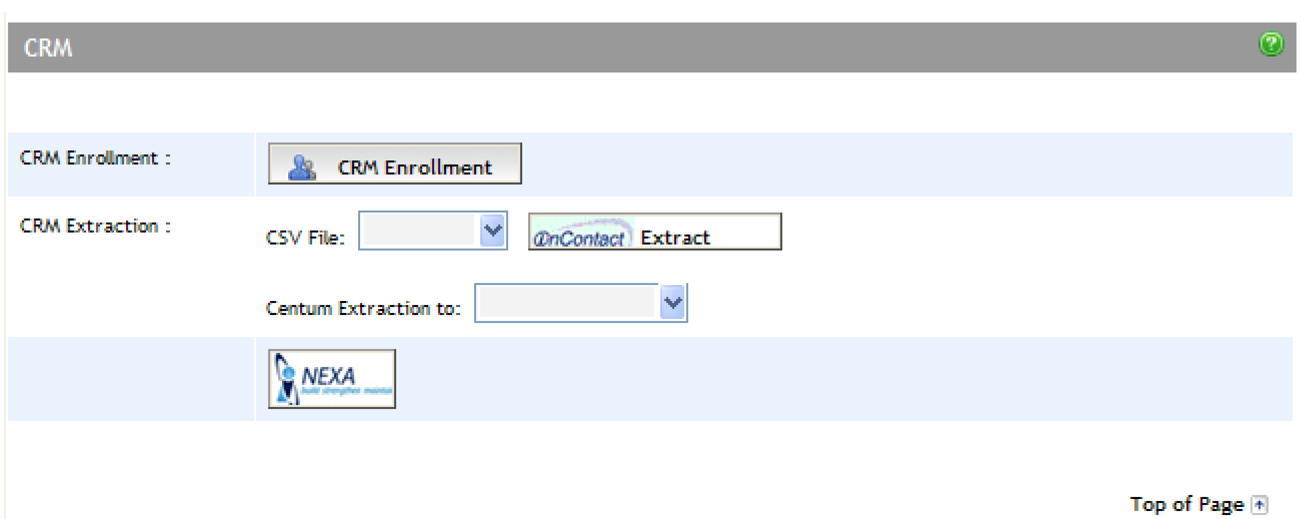
8. The time to create the file is dependent on the size. Clicking the **Extract to CRM** link on the Tools screen displays the progress status.

9. When the file has been created, click the **Extract to CRM** link on the Tools screen again. You are prompted to open or save the file. Save it to your computer, and then import it into your CRM program of choice.

Extracting Data from the Deal you are Working On:

Extracting data from the application you are working on is done via the Services screen. Complete the following steps:

1. With the application open, click the **Services** on the Left Navigation Pane. The Services screen opens. Scroll to the CRM section



2. From the **CSV File** dropdown, select the type of information to be extracted for the deal.

3. Expert creates the file in the background. When the file has been created, you are prompted to open or save the file. Save it to your computer, and then import it into your CRM program of choice.