# Data Export and Column Profiles

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**Revision Number: 9**

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# EXPORT TO FILE

Right-click anywhere in the grid, then go to Data Export.
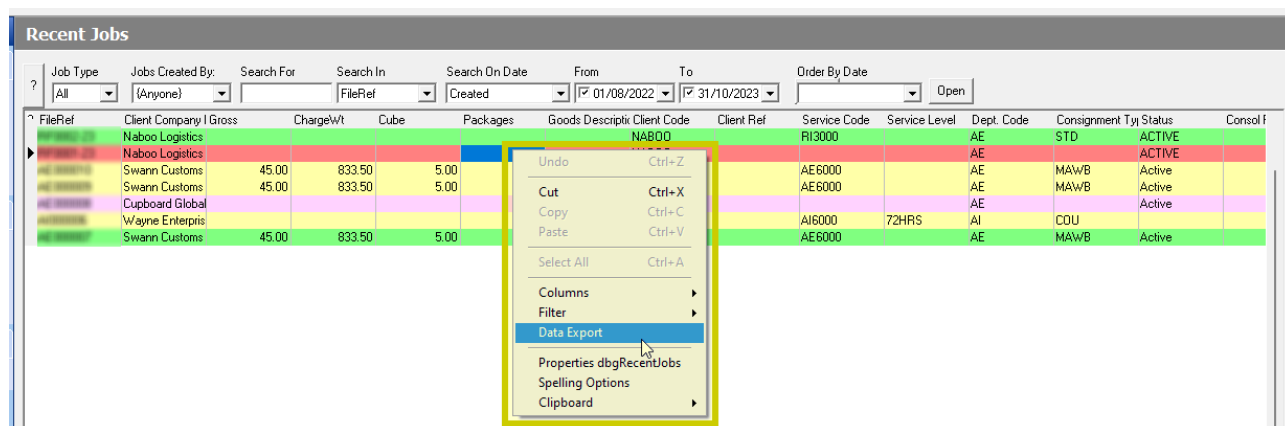


Recent Jobs > Right-Click > Data Export

You'll be presented with a Data Export window.

1. Saved profiles will appear here (see "Profiles" section for further reading). RED

2. Select/deselect fields you wish to be shown on the preview/exported file. Note: Right-clicking in that list, will show additional options to select "All, None, or Inverse" your selection. YELLOW

3. The preview shows which fields will be exported. GREEN

4. Choose the file type you want to save the data as i.e. Excel. BLUE

5. Click the Export button to create your file. PURPLE
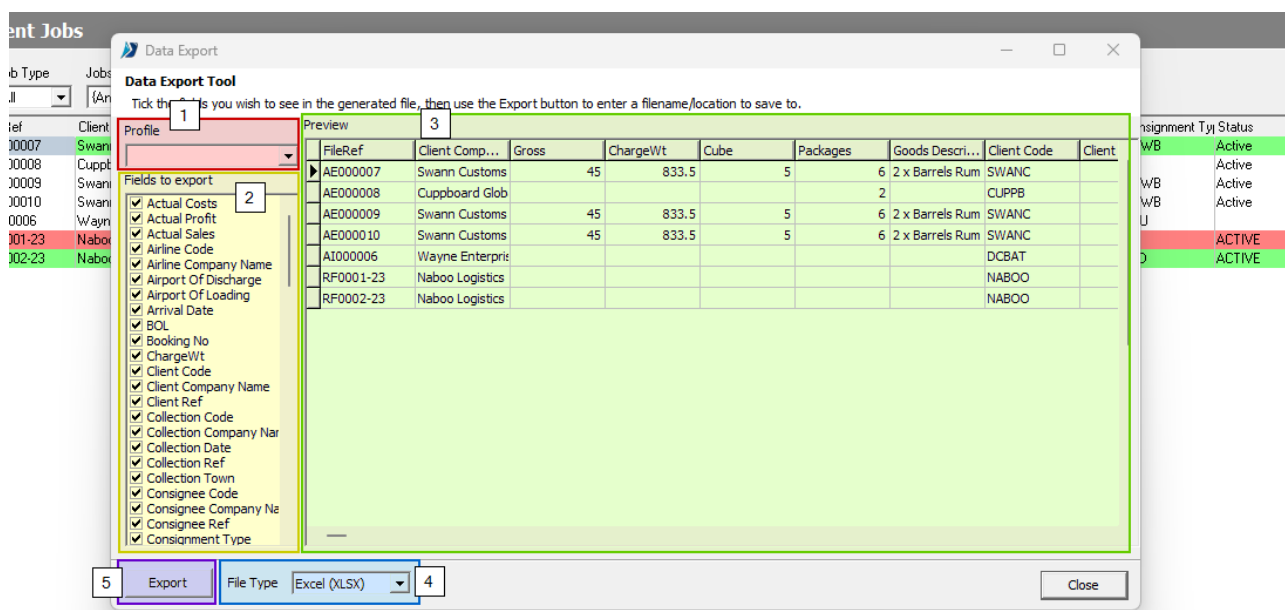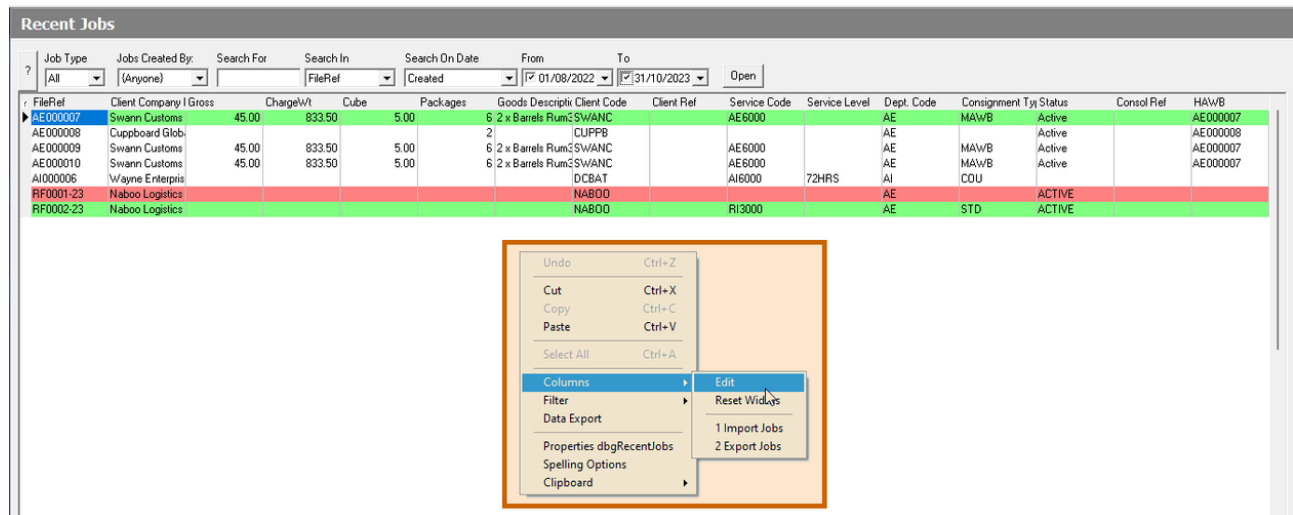


Recent Jobs > Right-Click > Data Export

# COLUMN PROFILES

Profiles allow you to keep a specific list of selected fields to export out to a file. This is meant to make the process of selecting/deselecting individual fields easier and quicker.

You are also able to share profiles with other users.
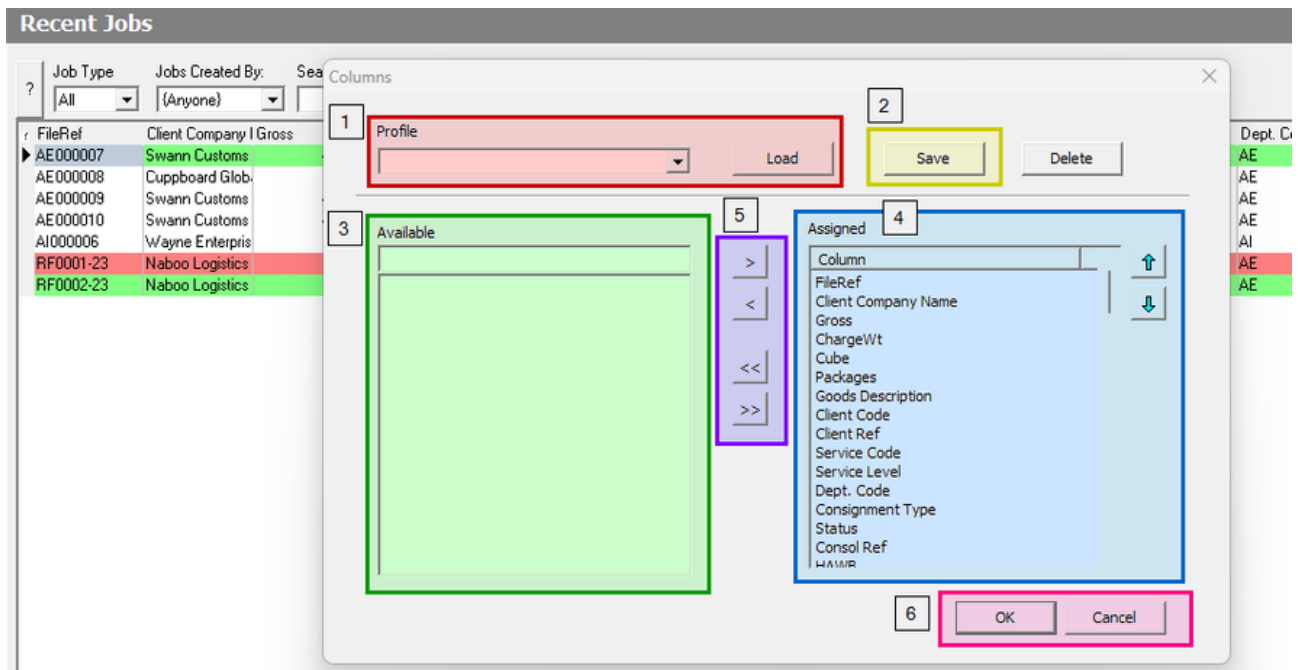
## Create a Column Profile

To create a profile, right-click anywhere in the grid, go to Columns (where available), and then Edit.



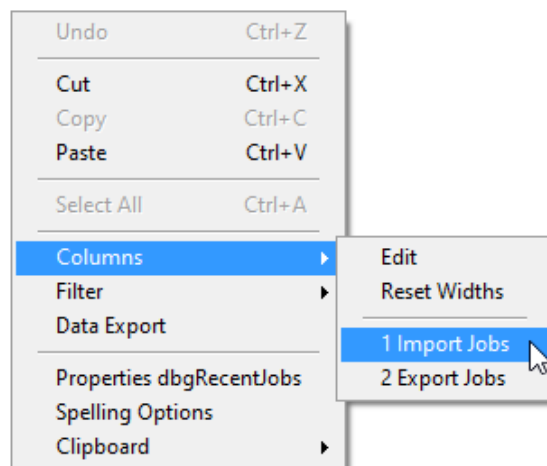Recent Jobs > Right-Click > Columns > Edit

The "Columns" window will appear.

1.  Here is where you type in your profile name. RED

2.  To save a new profile, click the Save button. If you already have a profile created, you can select it in the drop-down and then press the Delete button. YELLOW

3.  This is a list of available fields you can add (assign) to your grid. GREEN

4.  This is a list of fields currently shown (or "assigned") in your grid. BLUE

5.  Use these controls to switch fields back and forth among the available and assigned lists. PURPLE

6.  If you add/remove fields from the grid for your profile and then press the OK button, you will change the arrangement of the fields in the grid. If you only wish to save the fields to the profile, press the aforementioned Save button, and then the Cancel button (your profile changes will save). PINK

Recent Jobs > Right-Click > Columns > Edit

## Opening a Column Profile

All Column Profiles created will be displayed within the menu for Columns, below 'Edit' and 'Reset Widths'. Select one of these named Profiles to open.
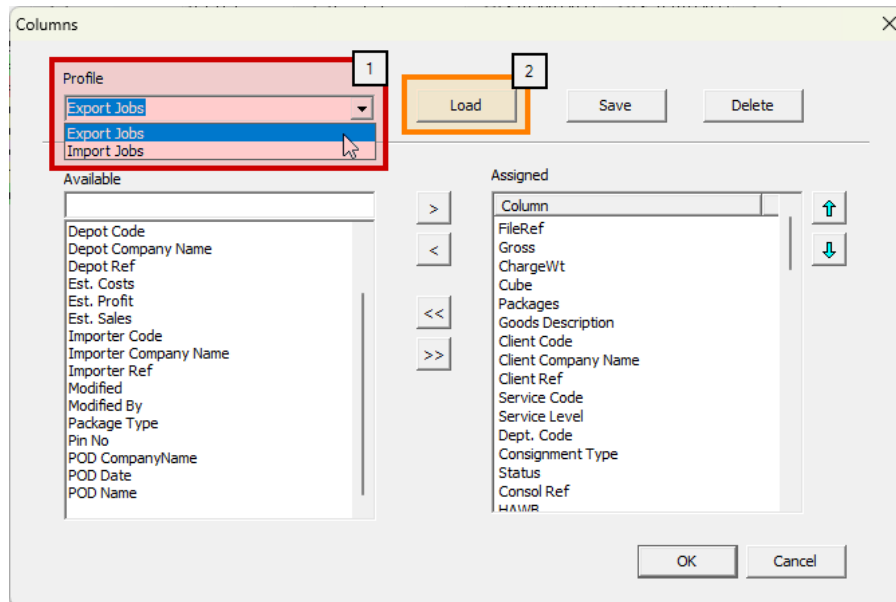


Recent Jobs > Right-Click > Columns

This will automatically move the field columns to match the selected Profile.

# Editing a Column Profile

Column Profiles can also be edited if needed. To do this, navigate to the 'Columns' window.

1. Select the Profile to edit <sup>RED</sup>

2. Click 'Load' to load the Profile. The two boxes should populate with columns. <sup>ORANGE</sup>
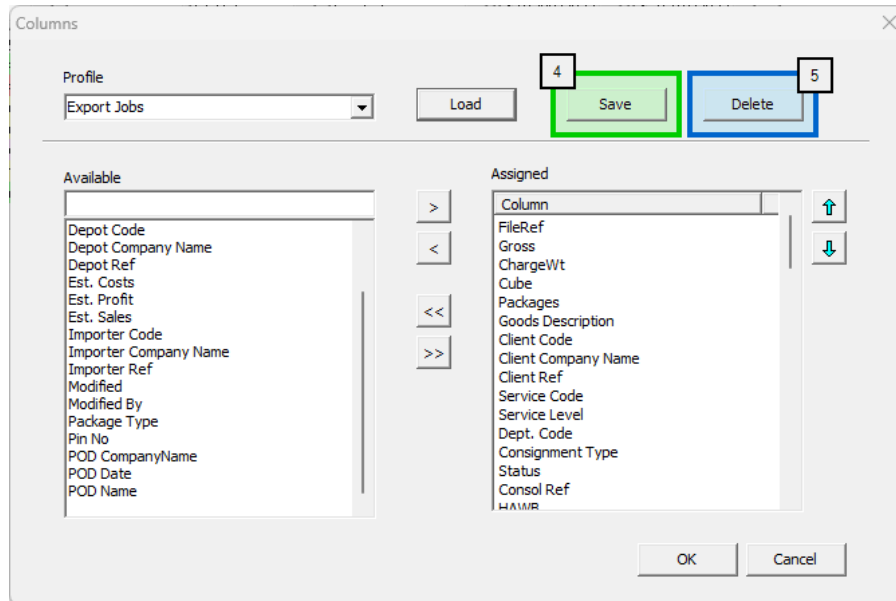


Recent Jobs > Right-Click > Columns > Edit

3. Edit the loaded Profile. You can move fields between 'Available' and 'Assigned'. All fields within the 'Available' section will be saved and displayed against this Profile. Fields within this section can also be moved vertically, fields at the top of this section will display on the far left of the screen with the fields below following to the right. <sup>YELLOW</sup>
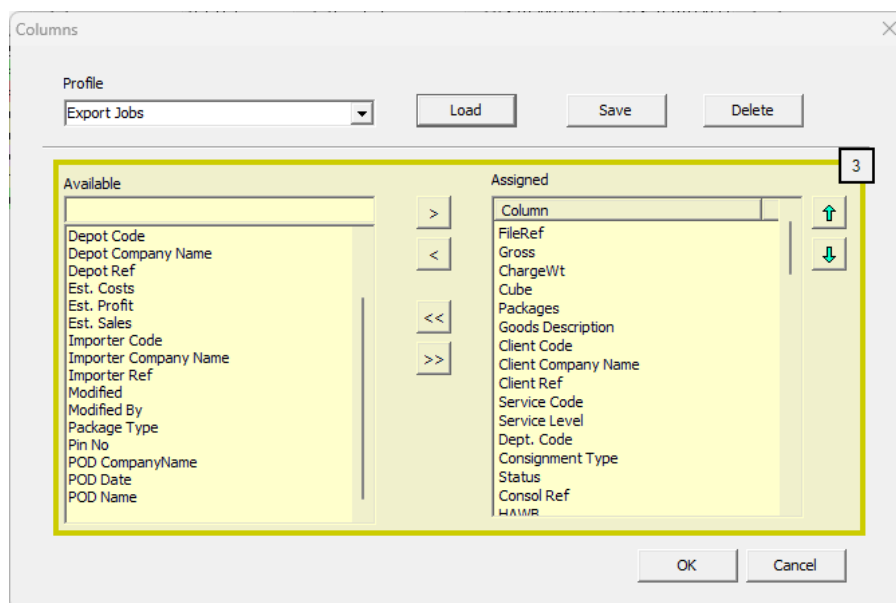


Recent Jobs > Right-Click > Columns > Edit

4. Once you are happy with the edits, hit 'Save' to add these changes to the selected Profile. <span style="color:green">Green</span>

5. If this Profile needs to be deleted instead, click the 'Delete' button but ensure you have selected the correct Profile as once this has been deleted, there is no undo. <span style="color:blue">Blue</span>



Recent Jobs > Right-Click > Columns > Edit

Hit 'OK' to exit this screen.

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# ADDITIONAL HELP

If you need additional guidance, please get in touch with us via email or telephone.
Tel: +44 (0) 330 223 5813
Email: helpdesk@sigmafreight.com
Website: https://www.sigmafreight.com/support/

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