

Export PDE Template

Purpose	Use custom field templates to include the correct custom fields in a PDE template.
Who should do this	CAREWare administrators or data managers who maintain custom fields and data exchange templates.
Use this guide when you need to	Apply a custom field template, export a PDE template, or confirm the correct cst_ custom field columns are included.
Main warning	Select custom fields from the correct location. A custom client field and a custom service field can have similar names but export to different tables.

Quick path

Path: Administrative Options > Data Import and Export Features > Provider Data Export > New Export > Edit Custom Fields > Apply Template

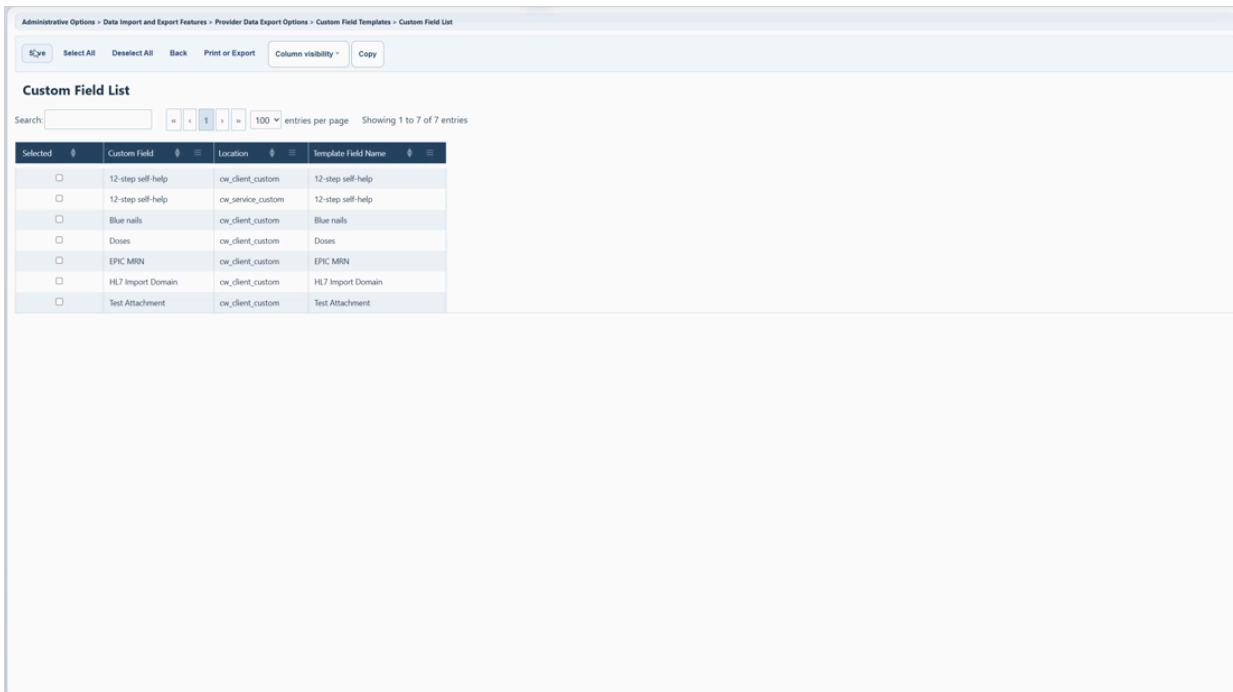
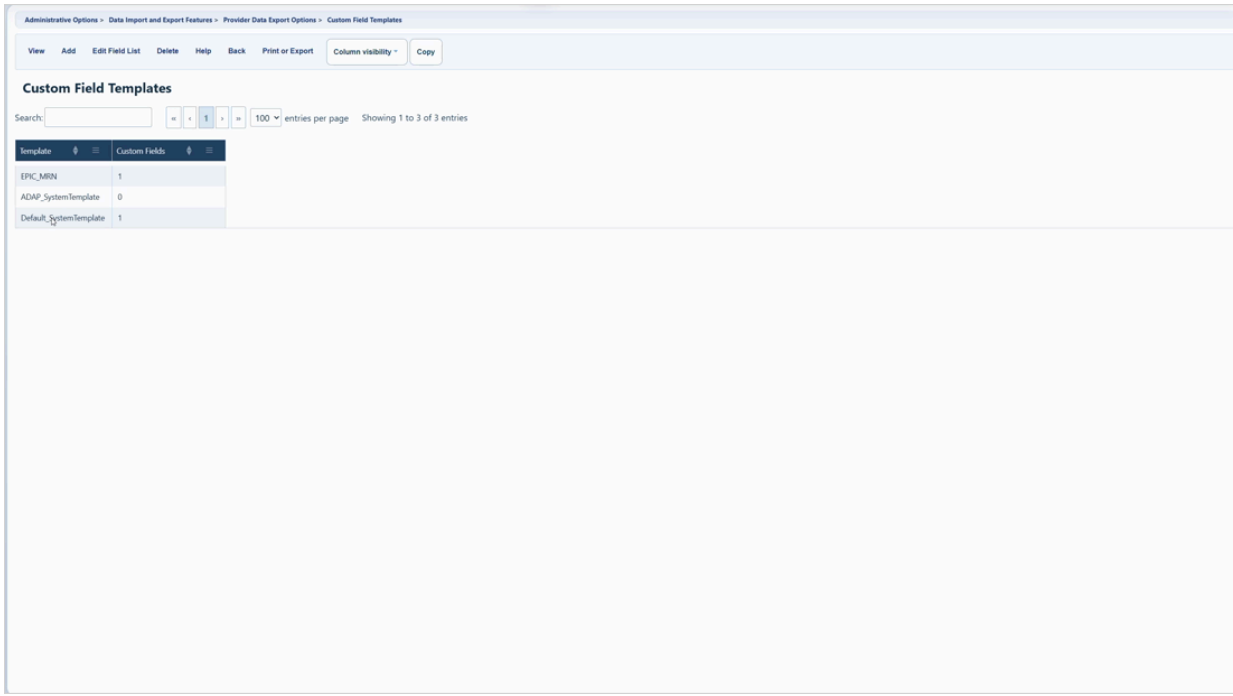
Before you begin

Confirm the custom fields are active and that the template includes the correct field locations. Custom field columns are exported with a cst_ prefix, such as cst_case_manager.

Tip: If you need to create or update the saved template first, use [Custom Field Templates](#) before applying it in New Export.

Create or review a custom field template

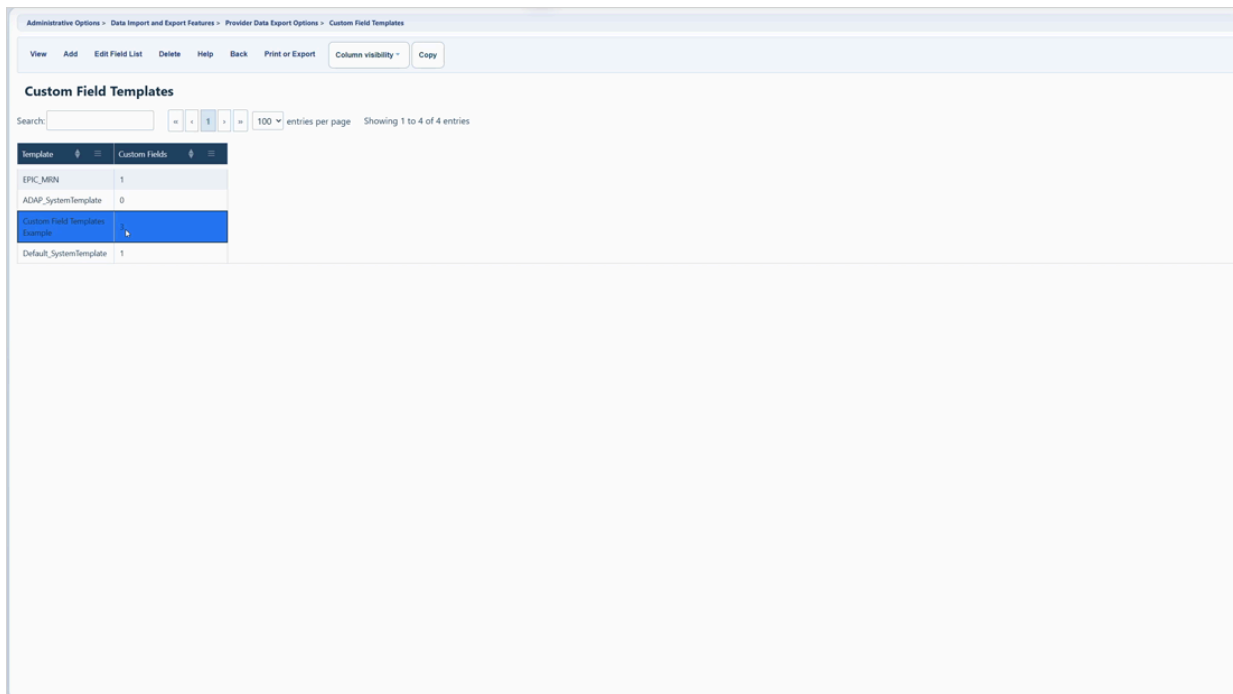
1. **Click** Administrative Options.
2. **Click** Data Import and Export Features.
3. **Click** Provider Data Export.
4. **Click** Custom Field Templates.
5. **Click** Add to create a template, or select an existing template and click Edit Field List.
6. **Enter** the template name if creating a new template.
7. **Check** each custom field that should be included. Confirm the field location, such as cw_client_custom or cw_service_custom.
8. **Click** Save.



Apply a custom field template to an export

1. Click Provider Data Export.
2. Click New Export.
3. Click Edit Custom Fields.
4. Click Apply Template.
5. Select the template to highlight it.
6. Click Append Template Fields to add the template fields to existing selections, or Replace With Template Fields to use only the fields saved in the template.

7. Click Save.



Export the template

1. **Return** to New Export.
2. **Check** each table to include in the template.
3. **Confirm** Custom Fields is checked when custom field columns should be included.
4. **Click** Export PDE Template.
5. **Open** the exported template files and confirm the expected cst_ columns are present.

Important: Append Template Fields adds the saved template fields to the current list. Replace With Template Fields removes current selections and leaves only the saved template fields selected.

Troubleshooting and common questions

- **Why is there no mapping for a custom field?** The field name in Custom Control Setup may not match the saved template field name. Refresh the template by removing and re-adding the custom field.
- **Why is the custom field in the wrong table?** Check the field location before saving the template.
- **Why do I not see the field in the export?** Confirm Custom Fields was checked on the export page and that the correct table was included.

Related guides

[Custom Field Templates](#) | [New Export](#) | [Importing Custom Data Using the Provider Data Import](#) | [CAREWare CSV Specifications](#)