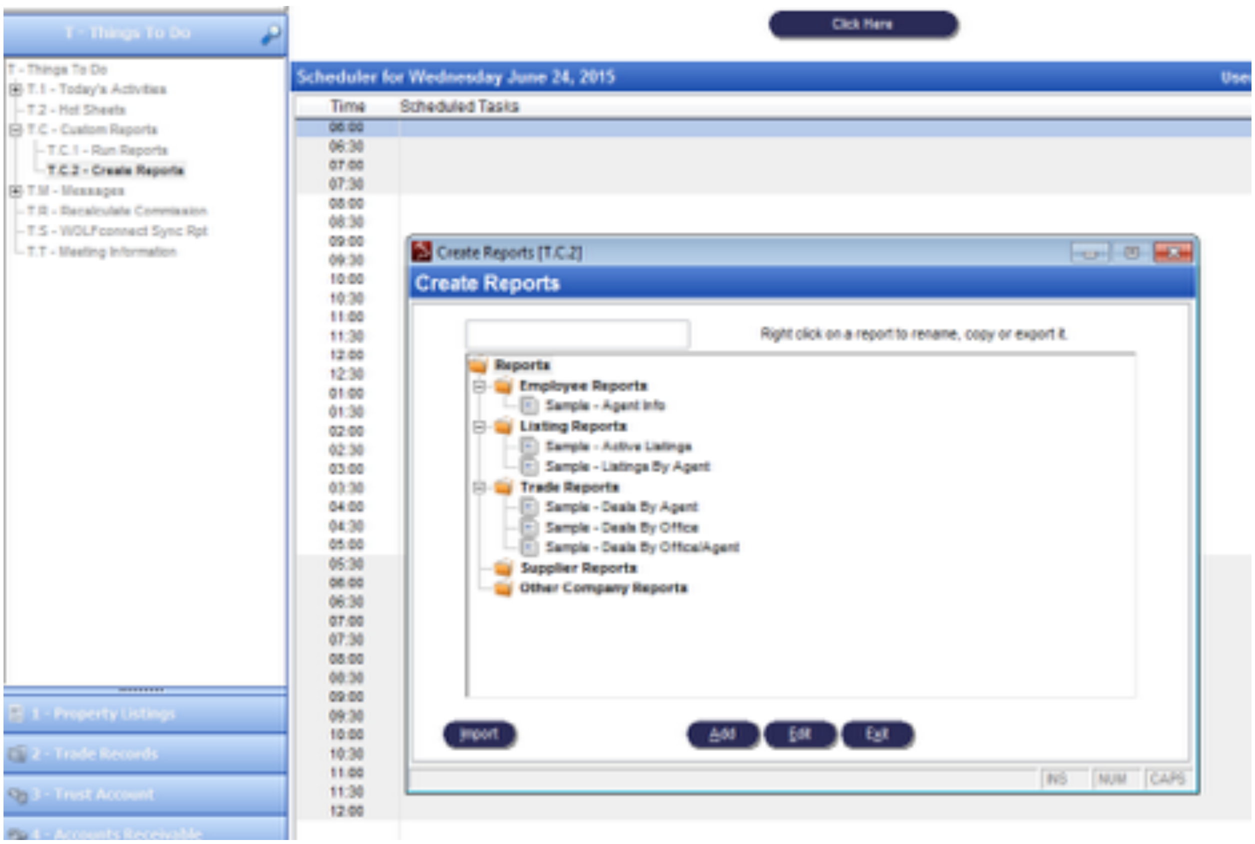
# Generating An Agent Custom Report For RealSatisfied Upload

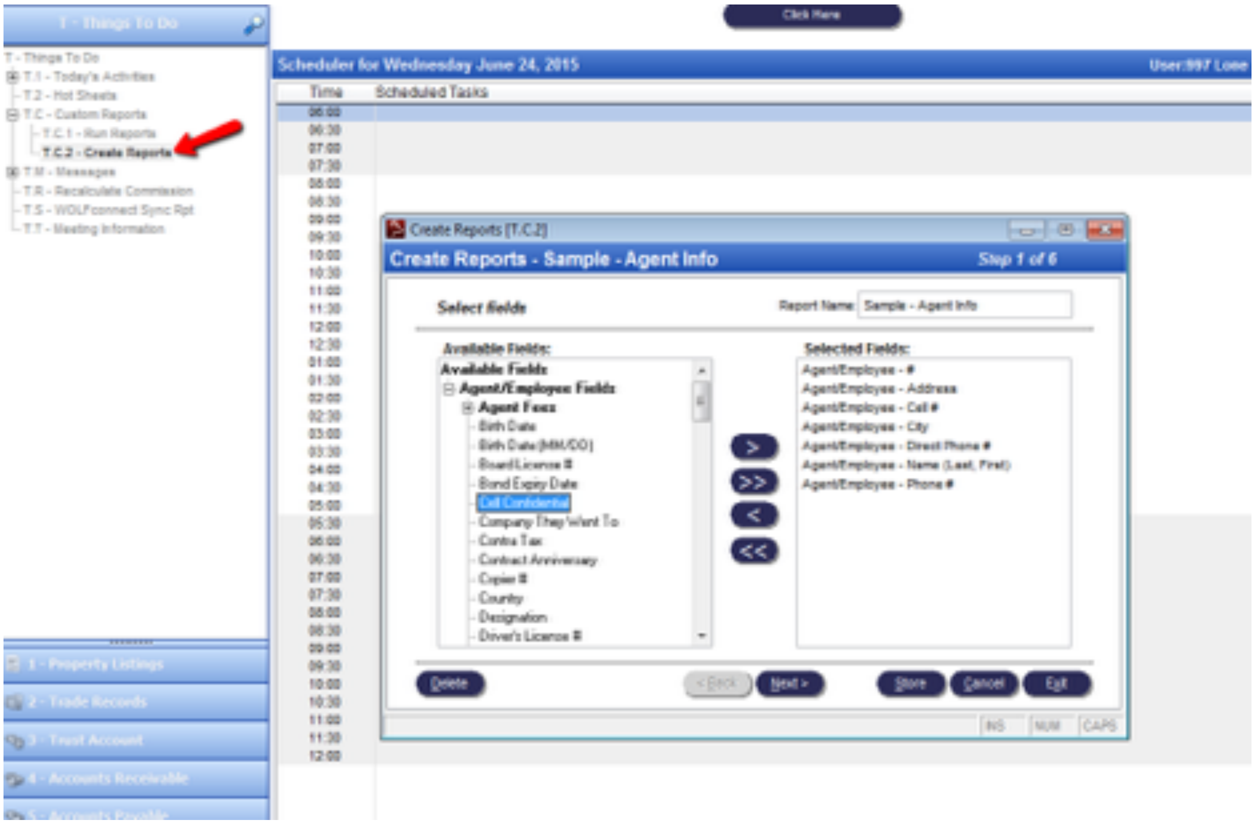
### Creating the Report

1. In T.C.2 (Custom Reports > Create Report) an administrator can update an existing report or create a new one. There is a default template called “Sample – Agent info.” This can be used to start, then add some additional fields that are needed.




2. Select the report you want to edit, or click on “Add” to create a new one.
3. On the Field screen, the right side should contain the following:
   a. Agent/Employee - #
   b. Agent/Employee - Address
   c. Agent/Employee – Cell #
   d. Agent/Employee - City
   e. Agent/Employee – Direct Phone #
   f. Agent/Employee – Name (Last, First)
   g. Agent/Employee – Phone #

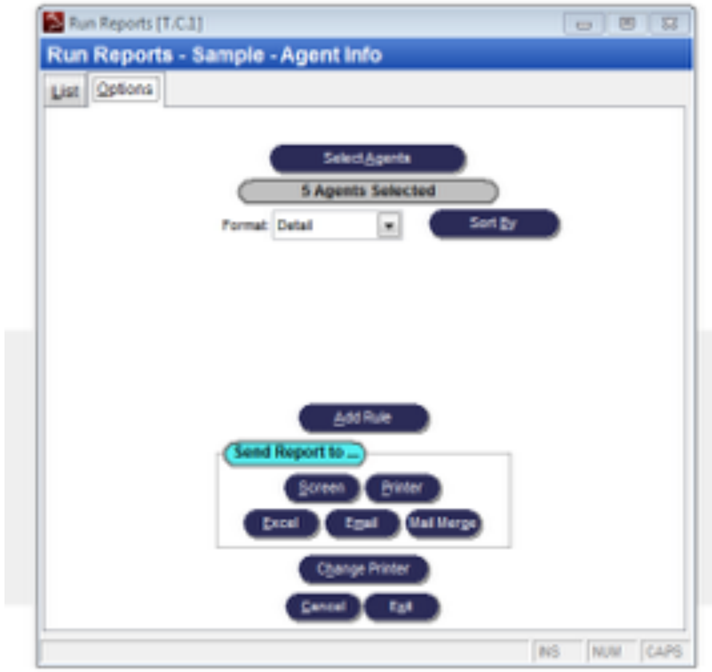
4. If a field is not included you will find it on the Available field list (on the left side). Select the new field and click on the “ > “ button will move it to the Selected fields area.




5. Once all the fields above are in the Selected list, click on Store button, then on Exit.

**Exporting the Report**

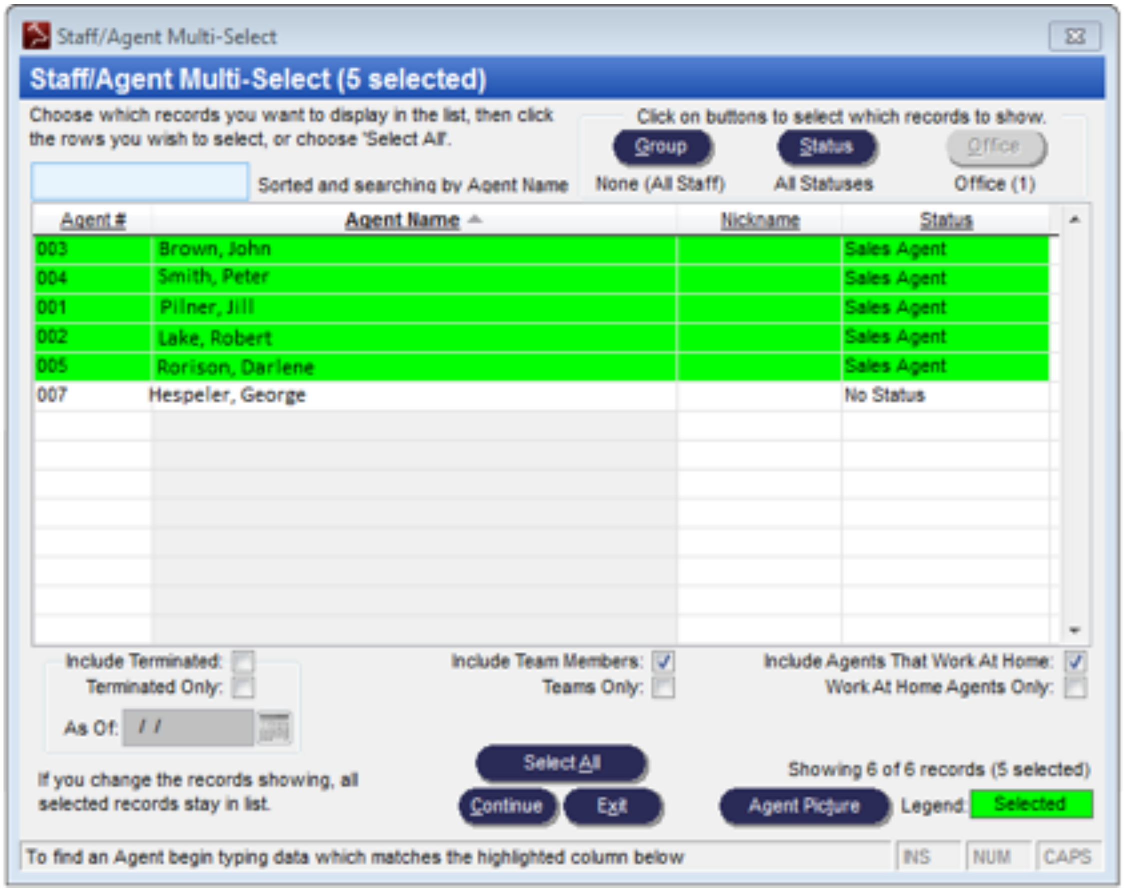
1. In T.C.1 (Custom Reports > Run Reports), select the Agent report.
2. Ensure all Agents are selected (on the screen it will display how many are currently selected).



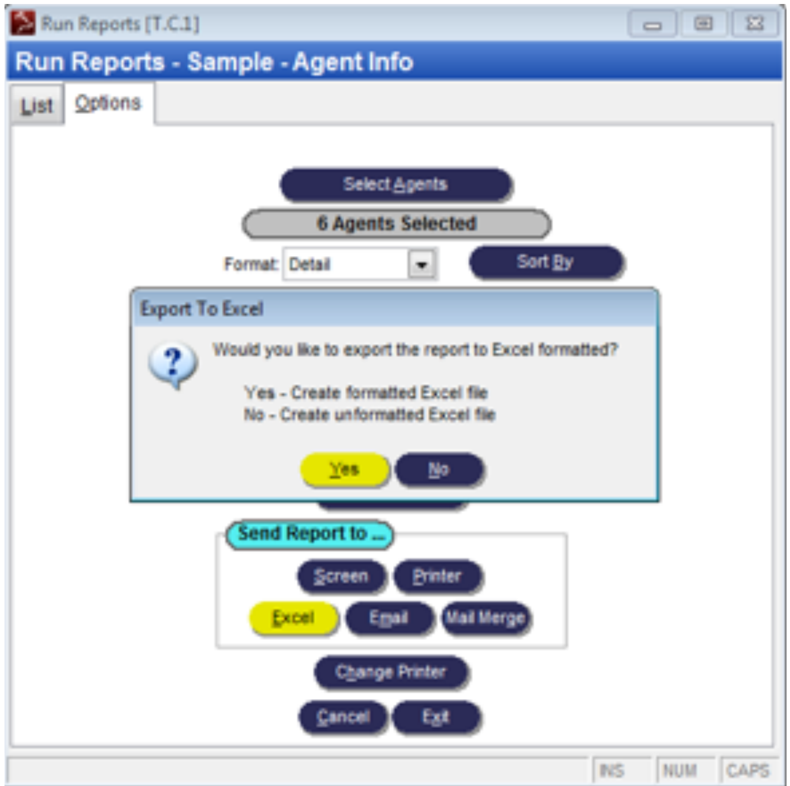

3. If you need to add/edit the list of Agents, click on "Select Agents" button

   a. To add/remove an Agent from the list, click on their name. If added to the list, the record will display in green.

   b. To select all, simply click on the "Select All" button.




4. Click on Continue to save the listings.
5. Under “Send Report To…” select Excel.
6. Select “Yes” to format the report in Excel




7. The report will be generated and will launch Excel.