## 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.

T - Things To Do	Cità Nere	
T - Things To Do T. 1 - Today's Activities	Scheduler for Wednesday June 24, 2015	Use
-T.2 - Hot Sheets	Time Scheduled Tasks	
By T.C Cuatom Haporta	06.30	
T.C.2 - Create Reports	07.00	
PD T.M - Mennagen	07:30	
- T R - Recalculate Commission	08.00	
- T.S - WOLF connect Sync Rpt	06.30	
T.T - Meeting Information	(Area to Reports (T.C.2)	
	1000 Create Reports	
	10:30 Create Reports	
	11.00	
	11:30 Right click on a report to rename, o	opy or export 4.
	12.00 Reports	
	at co	
	01:30 Sample - Agent Info	
	02:00 🕀 🙀 Listing Reports	
	02:30 - E Sample - Active Listings	
	03:00 - E Sample - Liatings By Agent	
	07:30 🕞 🔐 Trade Reports	
	04:00 - [1] Sample - Deals by Agent	
	04.00 - In Sample - Deals By Office	
	0530 Sample - Cease by Office Agent	
	06.00 Other Company Reports	
	06:30	
	07.00	
	07:30	
	08:00	
	09.00	
1 - Property Listings	09:30 (9:30 ENL)	
🗑 2 - Trade Records	10:30	[and ] [answ. ] [2,120]
9j3 - Trist Account	11:30	IND INTE CARD

- 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).

Run Reports [T.C.1]	
Run Reports - Sample - Agent Info	
List Options	
Select Agents S Agents Selec Format Detail	Sort By
Add Rule	•
Excel Epst	
Cancel Co	5
	INS NUM CAPS

- 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.

Staff/Ager	t Multi-Select					Ξ	8
Staff/Age	nt Multi-Select (5 select	ted)					
Choose which the rows you	records you want to display in the wish to select, or choose 'Select Al	list, then click r.	Click on b Group	uttons to selec	t which records to show.		
	Sorted and searching	by Agent Name	None (All Staff	) All Stat	uses (	Office (1)	
Agent#	Agent Nam	ne -		Nickname	Statu	<u>a</u> -	
003	Brown, John				Sales Agent		
004	Smith, Peter			Sales Agent			
001	001 Pilner, Jill				Sales Agent		
002	002 Lake, Robert				Sales Agent		
005	Rorison, Darlene				Sales Agent		
As Of: /	the records showing, all rds stay in list.	Include Team Me Team Select & Continue	mbers: 🔽 is Only: 📄	Include A V Show Agent Pic	Agents That Wo Vork At Home A ving 6 of 6 recor	rk At Home: gents Only: rds (5 selected	7) 1)
To find an Age	nt begin typing data which matches	the highlighted o	olumn below		NS	NUM CAP	s

- 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.