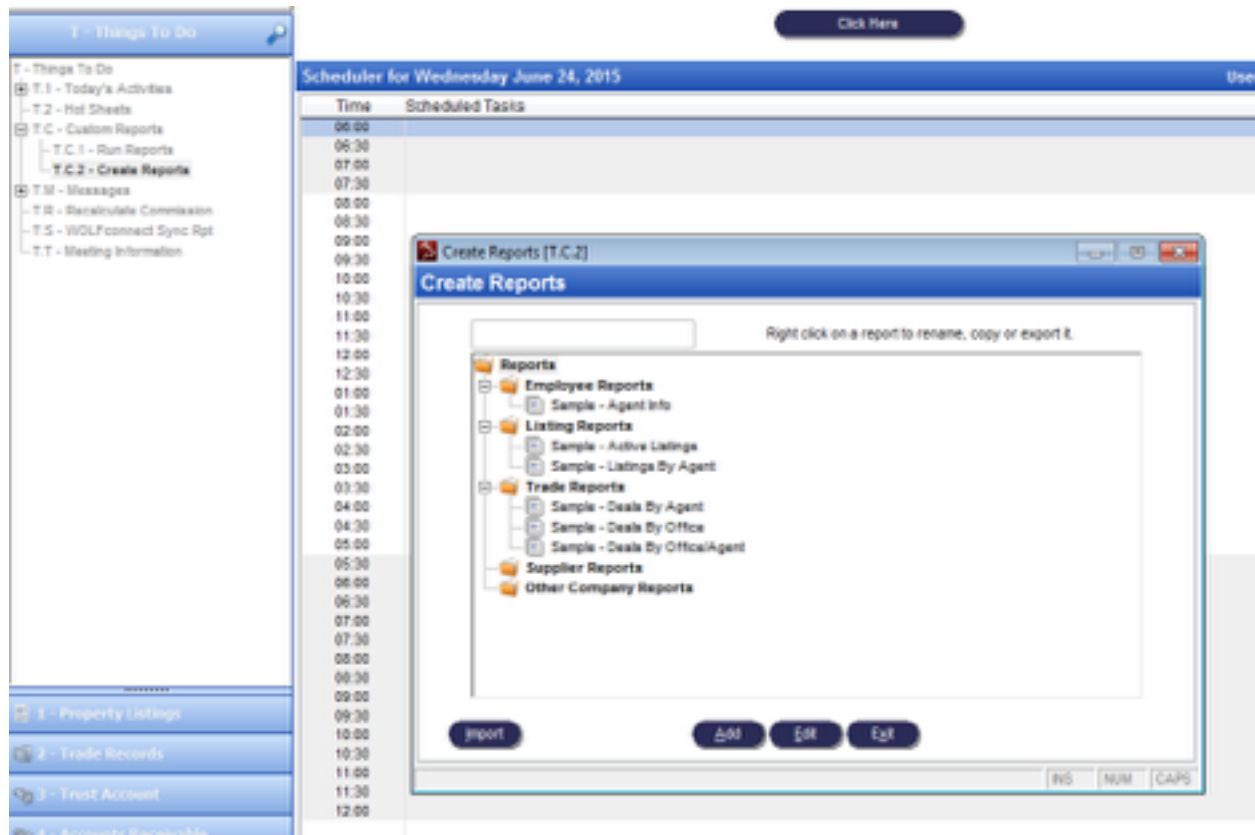


Generating An Agent Custom Report For RealSatisfied Upload

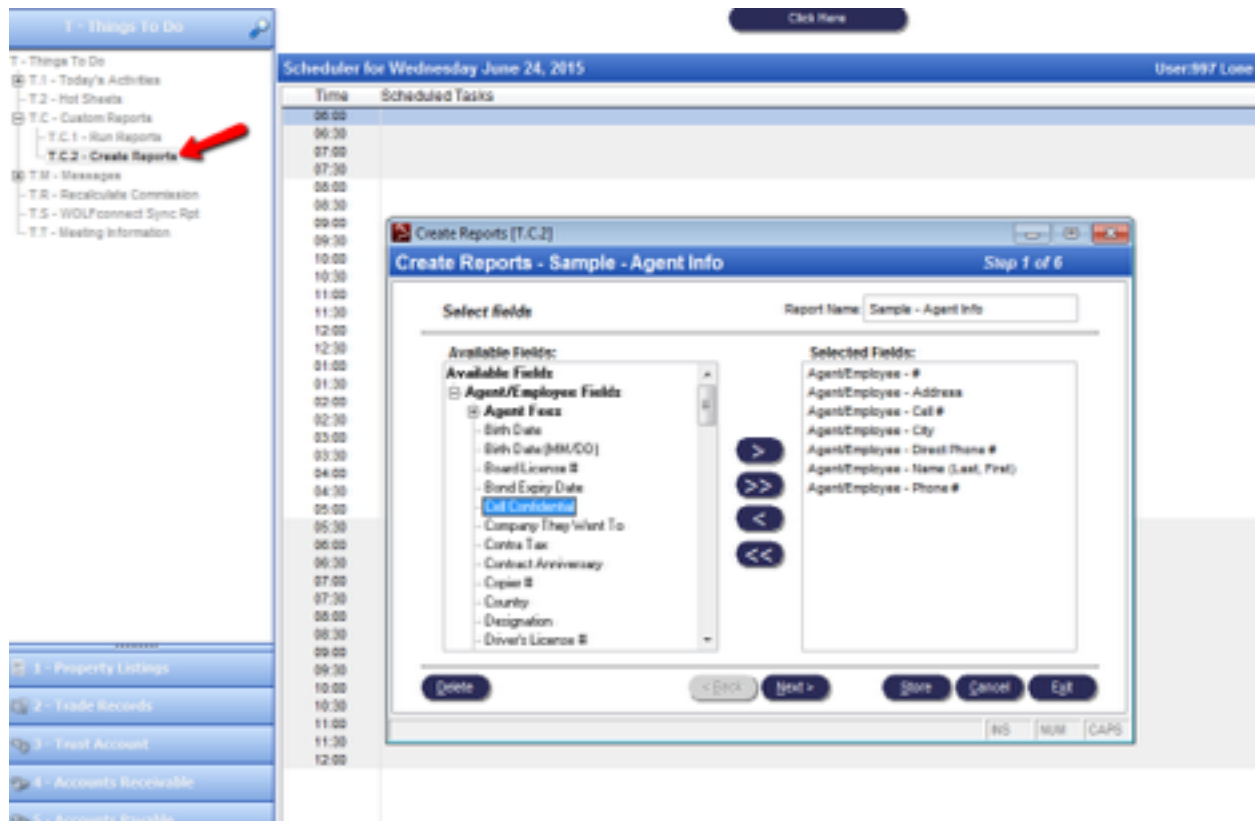
Creating the Report

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 #

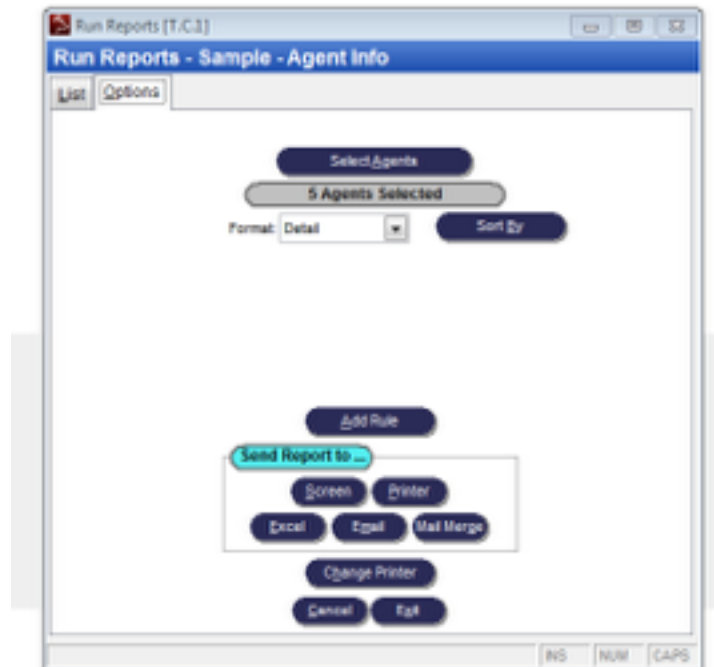
4. If a field is not included you will find it on the Available field list (on the left side). Select the new field and click on the “>” button will move it to the Selected fields area.



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.

Staff/Agent Multi-Select

Staff/Agent Multi-Select (5 selected)

Choose which records you want to display in the list, then click the rows you wish to select, or choose 'Select All'.

Sorted and searching by Agent Name

Click on buttons to select which records to show.

Group: None (All Staff) | Status: All Statuses | Office: Office (1)

Agent #	Agent Name ^	Nickname	Status
003	Brown, John		Sales Agent
004	Smith, Peter		Sales Agent
001	Pilner, Jill		Sales Agent
002	Lake, Robert		Sales Agent
005	Rorison, Darlene		Sales Agent
007	Hespeler, George		No Status

Include Terminated: Terminated Only:
 Include Team Members: Teams Only:
 Include Agents That Work At Home: Work At Home Agents Only:

As Of: //

Select All

Continue Exit

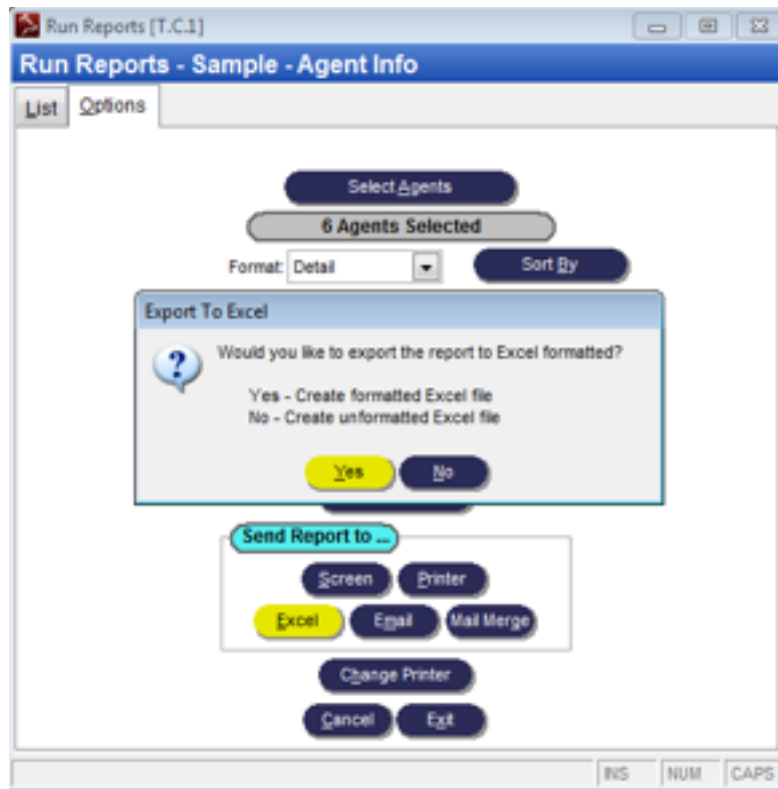
Showing 6 of 6 records (5 selected)

Agent Picture Legend: Selected

To find an Agent begin typing data which matches the highlighted column below

INS NUM CAPS

- Click on Continue to save the listings.
- Under "Send Report To..." select Excel.
- Select "Yes" to format the report in Excel



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