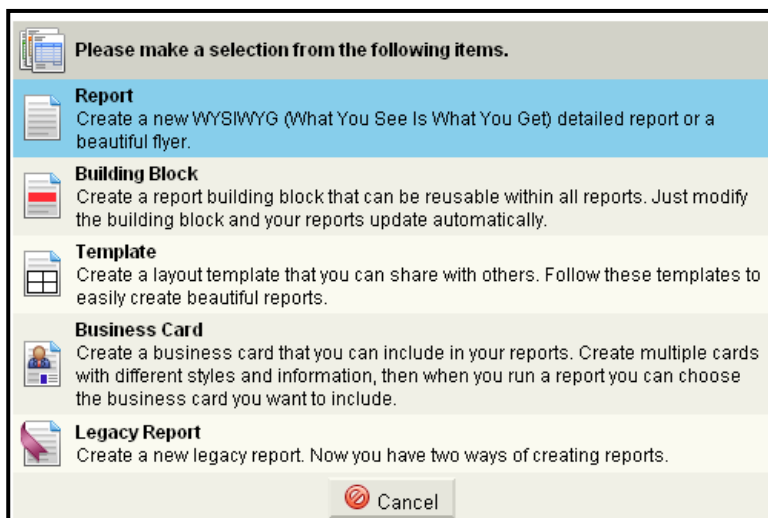# Custom Reports
Table of Contents

.

CUSTOM REPORTS

The Custom Reports module allows the user to format listing reports in a wide variety of ways, including choosing what data to display and where. Under Preferences, My Reports, these reports have the capability for extensive detail and functionality.

The Custom Report selection page contains a list of all previously saved custom reports. You may create, edit, and remove reports from this page. As the report name is selected from the box on the left, a description you have entered about that report will appear on the right.

REPORT TYPES

The Custom Report selection screen several different types of reports to help you personalize the layout and content of your reports. You may create, edit, and remove reports from this screen. To create a new item using the Custom Report Designer, click **New**. You will then be given the option to create a new Report, Building Block, Template, Business Card, or Legacy Report, as described below.

You may also edit any saved report, by clicking on the report title and clicking **Edit**. To permanently remove any saved report, click on the report title and click **Remove**.

Report

Click on **Report** to continue to the Custom Report Designer. This option will give you the largest number of fields to select from, as well as page and report headers and footers, and many tools to help you fine tune the appearance of your custom report.

Building Block

Building Blocks are reusable blocks of information that may be inserted in various reports. Like Reports, Building Blocks may include a wide variety of listing information, including photos and listing fields. Unlike Reports, Building Blocks do not include page or report headers and footers. Building Blocks may be used in multiple reports, allowing changes made once, to the Building Block, to automatically translate to all reports which use that Building Block.

Template

Templates allow you to set up a basic layout for use in multiple reports. You may then give this Template to other users for a consistent and professional appearance in your reports.

Business Card

Business Cards are a type of Building Block that include only Profile information. You may save multiple business cards (for use in your Commercial and Residential practices, for example) for use throughout the flexmls system.

Legacy Report

If you prefer to use the previous version of the Custom Report Designer to create a new report, click to **Create a New Legacy Report**. The Legacy Custom Report Designer section of this chapter describes these functions in detail.

CUSTOM REPORT EDITOR

The Custom Report Editor screen gives you the ability to extensively customize the look and content of your report. The Custom Report Editor is divided into two tabs - Edit and Options.
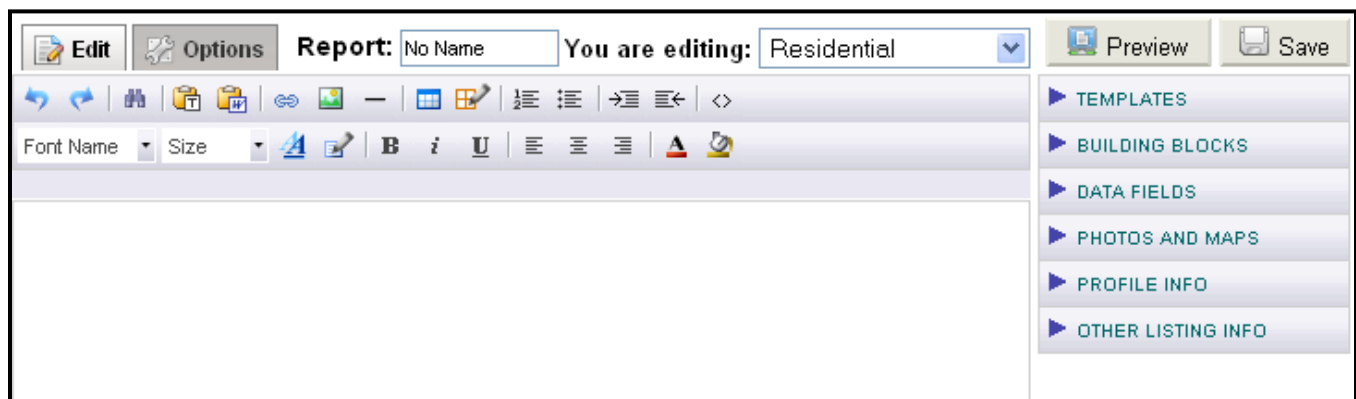
Edit Tab

The Edit tab includes all tools necessary to create a professional looking report. The screen includes basic word processing functions and the ability to include a wide range of data in a variety of formats. When you begin your document, the main editing pane will be blank. You may begin designing your report by clicking within that pane and then adding elements to your report using the tools and by adding fields from the options in the Tag Selection Panel. The drop-down list at the top of the screen will indicate the property type for the report you are currently editing. You may set up a different layout for each property type within one report.

Click **Preview** to open a window that generates a report populated with sample data from a random listing, or from an MLS number which you specify. You may set the Preview to refresh

automatically, and it will reflect changes that you make to the included fields and layout as you edit the report.

Save Button

   You may save a Report at any time, provided you have entered a name for the report. The Save button includes three options:

- **Quick Save** - Saves the report in its current form without leaving the report editor
- **Save and Return to My Reports** - Saves the report and brings you back to your full list of available reports
- **Change to Building Block** - Saves the current report as a Building Block and removes it from your report list
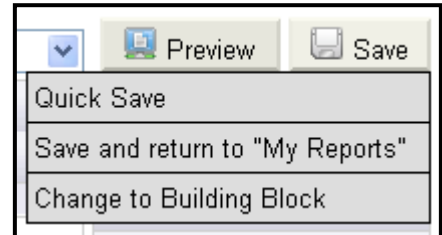
   Clicking on the **Save** button without choosing an option will automatically Quick Save your report.

Tag Selection Panel

   The right column, or Tag Selection Panel, is comprised of a list of available information fields that you may insert into your report. As you enter fields from the right-hand column, you will see coded placeholders within the editing pane. To preview your report with data populated from an example listing, click the **Preview** button at any time. The preview will open in a separate window. You may choose to have your preview screen automatically refresh as you make changes to your report.

   Click on **Templates** to display the list of saved templates available for your use.

   Click on **Building Blocks** to display the list of saved blocks or business cards.

   Click on **Data Fields** to display the types of fields that you may generate for the type of report that you are working on. For example, when working on a report for Commercial listings, the options will differ from those available when working on Residential listings. Click on the desired field type to access the Data Field Generation screen, where you may customize the appearance and content of your block of fields.

   Click on **Photos and Maps** to access the list of photo and map fields that you may insert into your report. To create consistently sized photos and maps on your report, after inserting the placeholder, click on the lower right corner of the placeholder and move to resize the placeholder to your desired image size. If your report has multiple listings horizontally, this will ensure that the photos and information will line up neatly.

   Click on **Profile** to insert names, images, and contact information from your Profile. Click on a heading to display the available fields.

   Click on **Other** to add additional information, such as a Supplement, Open House, or a Listing Counter. For example, using text in conjunction with the Listing Counter and Listing

Total fields, you may create a counter such as "Listing 1 of 10" to organize multiple listings in a report. You may also add content that appears only under certain circumstances. For example, click **Private Report Section** to enter a section that appears only on Private versions of a report.

Word Processing Toolbar

The Word Processing Toolbar allows you to manipulate the formatting of your report text. Hover your mouse over any icon to see a description of its function. Brief descriptions of the available functions follow:
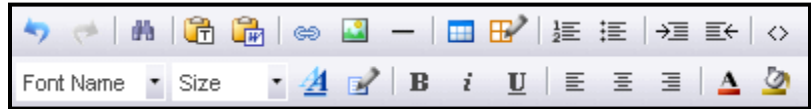
- **Undo** - reverses the most recent action
- **Redo** - reinstates an action which has been undone
- **Search** - locates text within the current report
- **Paste Text** - presents a pop-up window in which you can paste plain text
- **Paste From Word** - presents a pop-up window in which you can paste formatted text from Microsoft Word
- **Link** - presents a pop-up window where you may enter a web address
- **Image** - presents a format window for the selected image
- **Line** - inserts a horizontal dividing line
- **Insert Table** - presents a grid where you can define the size of a table; click **Advanced** to set table properties such as spacing and padding
- **Edit Table/Cell** - presents a drop-down list with three options for the selected table
- **Table Size** - where you may insert, delete, or adjust columns and rows
- **Edit Table** - where you may define the width and height of a table, adjust alignment, margins, or borders, and enter CSS information
- **Edit Cell** - where you may define the dimensions of the selected cell or its row, column, or the entire table, adjust alignment, margins, and borders of individual cells, rows, or columns, and enter CSS information
- **Numbering** - creates a numbered list for the selected text
- **Bullets** - creates a bulleted list for the selected text
- **Indent** - increases the indentation level of the selected text
- **Outdent** - decreases the indentation level of the selected text
- **View/Edit Source** - displays the html source code for editing by advanced users
- **Font Name** - presents a drop-down list of available fonts
- **Size** - presents a drop-down list of font sizes ranging from 8pt to 36pt
- **Text Formatting** - allows you to select the font, size, color, and other attributes
- **Styles & Formatting** - presents a drop-down list with the following options:
- **Paragraph Formatting** - allows you to set the alignment, indentation, and spacing of the selected paragraph
- **List Formatting** - allows you to choose the numbering or bullet style, starting number, and margin for the selected list
- **Box Formatting** - allows you to choose the box size; border style, weight, and color; and margin for the selected table

- **Custom CSS** - allows advanced html users to work with Cascading Style Sheet classes
- **Bold, Italics, and Underline** - perform the corresponding actions to the selected text
- **Left, Center, Right, and Full Justification** - apply the corresponding paragraph justification to the selected paragraph
- **Foreground Color** - presents a color selection block for the text of the selected area
- **Background Color** - presents a color selection block for the background of the selected area

Options Tab

The Options tab contains the most basic report options. Under the Options tab, you may set the Name of your report and any comments. The Options tab is also where you determine how many listings you would like to display per page. Use the drop-down lists to choose from the available number of listings to display horizontally and vertically. Under the Options tab you may also indicate whether you would like the Report to be inheritable. If you choose to make your report inheritable, logins at levels below yours will have the ability to use the report.

Check boxes include the default settings to **Bold Labels Upon Insert** and **Border Images Upon Insert**. Remove the checks from these boxes if you wish to disable those features.

As you are making changes to your report, DO NOT close your browser or go to another part of flexmls™ Web without clicking on the **Save** button. The system will prompt you   to save the report if you attempt to navigate away with unsaved changes.

Adding Fields to a Report

To begin adding information to a blank report, click in the editing pane to indicate where to place the first item. If you click on an object without indicating where it should be placed, you will receive the following error message:

> Before this can be added to the report, please click where you would like to place this item.
> If the report is blank please click to the left of the arrow.
>
> ⊗ Close
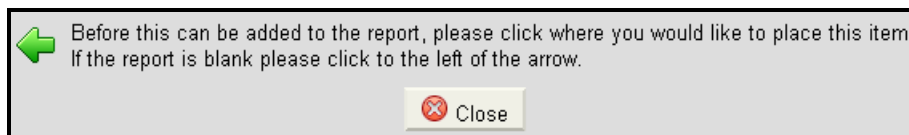
Next, choose the type of item you would like to add to your report. Typically, when beginning a report a Template or a table will be the first item added, as Templates and tables offer a framework in which to place listing information. If you begin by adding a template, your editing pane may look something like this:

You will see information within double sets of curly brackets. That information, called a "tag," is a placeholder for listing information, similar to a mail merge. The preexisting templates will contain tags for data common to all property types, such as photos, or address information. The blank areas of the template are places where you may insert the data fields of your choice.

```
{{M:Short Address:8B}}

                                        [Insert key Data Fields here.]


              {{photo:1}}


[Insert other Data Fields here]  [Insert other Data Fields here]  [Insert other Data Fields here]
```

To insert listing information fields, click on **Data Fields**, then select the type of information you would like to insert. The Field selection window will appear. For example, if you select Main Fields the Main List Field selection window, as shown below, will appear.

From here, you may choose which fields you would like to include and how you would like the information formatted. Select fields from the left-hand column (ordered Alphabetically, By Type, or By Group according to your selection in the Sort By radio buttons) and click **Add** to include the fields in your report. Fields will appear in the order shown in the right-hand column. To change the order of the fields, select a field and use the up and down arrows to move the field up or down in the list.

Layout Options

- **Layout** - You may choose whether you would like the information presented in a List or Left/Right format by clicking on the appropriate radio button. List format includes the label and field value separated by a space, while Left/Right aligns the field values, as in a table.

- **Number of Columns** - Choose the number of columns you would like to display using the drop-down field provided.

- **Insert Label Tag** - You may choose whether you would like to include the Label Tag by clicking the radio button next to your choice. For example, when entering List Price as a field, this selection will determine whether the report entry is displayed as **List Price: $325,000** if "Yes" is selected or simply as **$325,000** if you have chosen "No."

- **Blank Value Label** - Choose whether you would like the Labels to appear when the field value is blank. For example, if you have selected the field Fireplace and the listing has no entry for that field, you are choosing whether you would like the label Fireplace to appear or if you would like it to be hidden.

- **Label Separator** - Choose what you would like to separate the label from the field value. The default separator is a colon, or you may choose a line break or no separator if you prefer.

To save your layout settings for future use, click **Save Settings**. To remove a field from the Selected Fields, select the field and click **Remove**. When you are satisfied with the fields and their order and are ready to return that information to your report, click **Insert Fields**. To return to the report without inserting any fields, click **Cancel**.

EDIT INDIVIDUAL REPORTS

You may edit individual reports populated with listing data. This feature allows you to fully customize any report on a listing by listing basis, rather than having to make formatting changes to the report.

From any Search Results screen, select one or more listings and click **Print**. Select the report from the drop-down list of available reports, then click **Edit**.

A separate window will open with your report. You may then edit, add, or delete text as desired. You may delete photos and make adjustments to the report as needed according to the information included for each listing.

From this screen, you may e-mail, print, or save your edited report. Click **Save** to keep a copy of your edited report in My Documents. You may then access the edited report by clicking on Preferences, My Profile, **My Documents**.

Legacy Custom Report Designer

LEGACY CUSTOM REPORT DESIGNER - GENERAL

The General Tab is where the basic information about the report is defined. Each part of the General Tab is described below:

- **Report Name** - Type the name of the report in this field. This name is only used to identify the report from a selection box and does not actually appear in the report itself. A name must be entered before moving to another tab in the Designer.

- **Number of Listings Across Page** - Choose from the drop-down menu the number of listings to go across the page. This option will allow

you to define how many listings will fit horizontally across a page before moving down to the next row of listings (more efficient use of space if a compact report format is desired). If creating a full listing report, do not choose more than one for this option.

▪ **Number of Listings per Page, Vertically** - Choose from the drop-down menu the number of listings that should fit vertically on each page. This will determine how frequently page breaks will occur in the report.

For example, if two listings per page are selected, a page break will be automatically inserted every two listings. If there should be no page breaks, select "No Page Breaks" from the top of the drop-down menu. A reasonable number must be selected to ensure that the listings will fit on a page.

▪ **Order Report by View** - This drop-down menu contains a list of all available Views and allows the sort order of the listings to be controlled. The column order in the selected view will determine the order of the listings in the case of a report with more than one listing. If MLS number is chosen, the report will be ordered according to the MLS numbers of the listings selected for the report.

For information on how to customize Views, see the Preferences section of the manual.

Please note, as you move through the Legacy Custom Report Designer, help tips are available within each part of the Designer. Simply click on a section and a help tip will display on the right side of the screen.

> **Help**
> Help is available for items on this screen. Click on a particular item for which you wish to receive help. Available help will appear here.

▪ **Expand Report to Fit Page** - If this option is selected, the report will be expanded to fit the page, based on the number of listings per page that are selected.

If the report designed contains a great deal of information, or fonts or pictures that are too large, the report may not actually fit on one page. Note also that this item does not shrink the contents of the report to fit a page; that is the responsibility of the report designer.

▪ **Display "Please Wait" box** - Check this box to have a "Please Wait" message display while the report is being generated. This window will disappear after the report is fully loaded.

▪ **Inheritable** - Check this box to make the report inheritable to users below you. If using the MLS login, the report will be available to all members of the MLS. If creating the report with an Office login, the report will be accessible to all members in the office.

▪ **Report Comments** - The Report Comments section will allow an additional description to appear beside the report name to assist in selecting a report. Type this description in the text box for Report Comments. This will appear only in the selection stage, and will not appear in the report itself. This can be very helpful if there are a large number of custom reports from which to choose; if the report is inheritable, the comments can be very useful to others who want to use the report.

LEGACY CUSTOM REPORT DESIGNER - LISTING LAYOUT AND CONTENT

Within this tab the layout of each listing is defined. The sections are composed of containers, which are defined from this tab. Spacing and appearance of the containers are defined here. Also, the specific listing content that is desired for the containers is defined. After clicking on the Listing Layout and Content Tab, a "Please Wait" message will appear, the message will go away and the page will be displayed.

First, define the layout of each of the sections of the report. Choose the property type to be worked with first from the drop-down menu. Choose the name of the corresponding section that was defined for that property type (the sections are defined under the Advanced tab).

Click on the **Use Template** button to create the section according to a pre-defined template or click on the Design Custom button to customize a section layout.

If a pre-defined template is chosen for the layout of the section, a new window will open with six template formats. Click the radio button next to the option to be used and click the **Select** button. If none of the templates are what is needed, click the **Cancel** button to be return to the prior screen.

Once a custom design is selected, the screen will appear with the first container. The layout is further customized by using buttons below.

A container is selected by clicking on the label directly within the container. Add in the

appropriate containers to complete the customization of the layout.
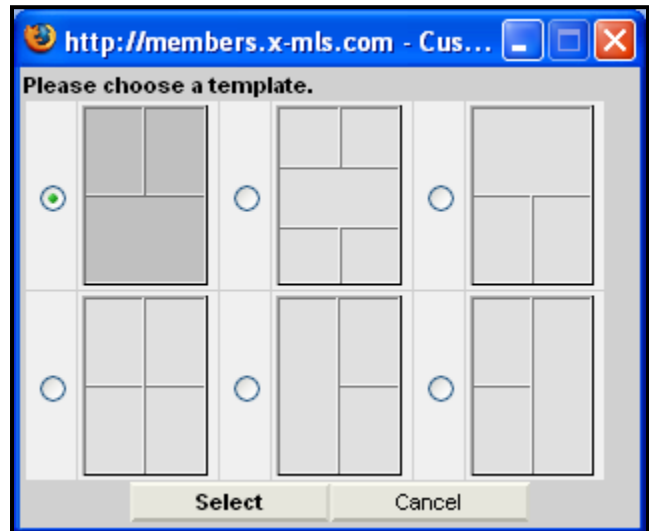
To add in a new container, select the container next to where it should be placed and click the **Insert Container** button. This will add a new container to the layout. If a container should be removed, click the label in the container to select it and click the **Delete Container** button.

The containers may be moved around in the layout by using the Row and Column controls within each container. Each container has a drop-down menu for both the row and the column that the container will be placed in. To move a container, choose the new row or column from the appropriate menu and the container will be moved accordingly.

For each container selected, this layout process will need to be repeated. Customize the container properties and the content of the container.

Below the layout controls, there are two tabs that will allow the Properties of the container and the Content of the container to be customized. This process can be repeated for each container that is defined. (The Advanced tab allows you to set custom fonts, and styles for complete sections of a report, so that each container within a section does not need to be set individually.)

Container Properties

Choose the Container Properties tab to customize the properties of items within the container. On all choices, choose the blank option at the top of the list if there should be no customization.

- **Row Span** - Choose the number of rows that the selected container should span in the section.
- **Column Span** - Choose the number of columns that the selected container should span in the section.
- **Container Width** - Choose the percentage of the report that the width of the container should occupy.
- **Container Height** - Choose the percentage of the report that the height of the selected container should occupy.
- **Horizontal Alignment** - Choose the page alignment, horizontally, that the section should have (Left, Center, Right.)
- **Vertical Alignment** - Choose the page alignment, vertically, that the section should have (Top, Middle, Bottom.)
- **Background Color**- Click in the selection box to open the Color Picker window so that the background color may be customized.
- **Font** - Click in the selection box to open the Font Picker window so that the font may be customized.

▪ **Style** - Click in the selection box to open the Style Picker window so that the style may be customized.

Container Content

Choose the Container Content tab to select what listing content will be included in each container. From this tab, you may choose individual fields of information to include on your custom report. For each type of data, you will have options to customize the appearance. Formatting options may differ according to MLS settings.

Options for customization will appear at the bottom of the container content tab. Throughout the data types you will be given the option add and remove content using the **Add** and **Remove** buttons, reorder the selected content using the **Up** and **Down** buttons, and customize the font, color, and style using the Font Picker, Color Picker, and Style Picker.

LEGACY CUSTOM REPORT DESIGNER - HEADERS AND FOOTERS

This tab defines what will appear in the headers and footers for the report. You may enter text, a pre-defined attachment, or have no header or footer at all.

You have the option to choose headers and footers at the Report level or Page level. The Report Header and Footer will contain information at the top and bottom of just the first page of the report. The Page Header and Footer will contain information that will appear at the top and bottom of all pages of the report. Typically, either Report or Page Headers and Footers would be chosen, not both. Items like page titles, company slogans, company logos, and contact information make good headers and footers.

For all headers and footers, you may choose text, report attachment, or none. To enter in text for a one of those options, check the radio button next to **Enter Text** for the section desired. Type the information in the field labeled **Text**. Click in the Font selection box to customize the font and click in the Style selection box to customize the style.

To enter in an attachment, click the radio button next to the **Select Attachment** option. From the drop-down menu, you may select one of the attachments that are pre-defined from the Report Attachments section of the program. If no header or footer is desired, click the radio button next to the option for **None** in the appropriate section.

LEGACY CUSTOM REPORT DESIGNER - LISTING/SELLING AGENT INFO

This tab defines what information about the Listing/Selling members will be disclosed. Any combination of names and contact information may be put here in any font/style that is specified.

Choose the type of member that the information will be customized for first by selecting the name from the **Fields** list. Click the **Add** button beneath the **Set properties** heading to open up a separate window for the contact information properties.

This window will allow for the specific customization of the fields of contact information that should appear in the report. First, choose from the drop-down menu labeled Contact Info Type the type of contact information that will be customized. Items such as phone numbers and e-

mail addresses are available to be selected here. Once you have chosen the type of contact information, choose from the menu labeled "For." Choose from the name of the member, the name of the Member's office (branch office), the name of the Member's company, or MLS. Finally, in the drop-down menu labeled Type, select if just the Primary contact information will appear, or all of the contact information. Click **OK** to save the changes. To exit without saving, click the **Cancel** button.

The Custom Contact Information option may be selected from the menu labeled **Contact Info Type**. There will be a text field for the Contact Information Label, as well as a text field for the Custom Contact Information.

This step must be repeated for all of the contact information that is necessary for the report. If only the phone number for the Listing Member and Listing Office are desired, then this step must be completed twice.

The default font settings for the contact information are determined under Step 3. First, customize the font for the labels and for the information by clicking in the font selection boxes for these items to open up the Font Selection Window. Next, type in the symbol that should appear as the item separator in this text field (for example: ; : , - / \ ). Check the boxes for display contact info type (the item chosen in Step two) or contact info description (the item customized below Step 2) if either of these should appear in the report.

In the drop-down menu titled **Label**, choose the label for the information field. If you would like to leave it with the defaulted value, choose **Use Default Value** from the menu. Next, customize the font for the label and the data by clicking in the font selection box to open up the Font Selection window for each of these. If any text appearing before or after this contact information is desired, please type it into the appropriate fields, then customize the font for those items by clicking in the font selection box to open up the Font Selection window.

LEGACY CUSTOM REPORT DESIGNER - ADVANCED

This tab allows for a high amount of customization of the appearance of each section in the report. Items such as color, font, style, and spacing may all be defined in this tab. Creating multiple sections for a report will allow for greater control over appearance. Typically, the same sections are defined for all property types, although they may be different according to each property type. The settings defined in this tab must be customized for each individual section of each property type.

Choose the property type for which the section that is going to be created from the column on the left. Typically, the sections are defined to allow for listings from all property types. This makes the customization much easier, as it is less detailed. However, sections may be defined for each individual property type if desired.

Once a property type is selected from the list in Step 1, click the **Add** button below Step 2 and this will open a window to type in the name of the section. Type the name of the section and click **OK**. Click **Cancel** to leave the window without saving the changes.
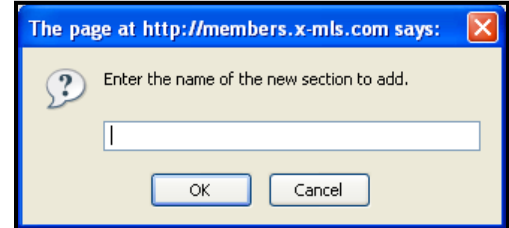
Typing the name of the section into the window will enter the name of the new section into the list under Step 2. To edit one of the section names, choose it from the list and click on the **Edit** button. To remove any of the sections from the report, choose the name of the report and click the **Remove** button below the list.

The sections may be reordered by using the **Up** and **Down** controls to the right of the list containing the section names. Choose the section by selecting it from the list and click on the Up or Down button until the section names are in the proper order. Once a section name is selected from the list in Step 2, the options for Step 3 will appear.

This step allows for the customization of the properties related to the section specified in Step 2. Click in the Font and Style selection boxes to open the Font and Style Selection windows so they may be customized for this section of the report.

Choose from the drop-down menu labeled **Width of Page** the percentage of the page that the specified section should occupy. The Alignment drop-down menu contains three values that determine where in the report the selected section will be aligned. Click in the selection box for Background Color to open the Color Picker window. Once these items are customized, further advanced properties of the section may be defined by clicking on the **Advanced Properties**.

Advanced Properties

The Advanced Properties link will allow for further customization for both the appearance of this section and the way it will appear in relation to other sections. Though not necessary, the Advanced Properties will allow for a more custom appearance.

There are several items that may be customized. The first three deal with issues relating to the actual layout of the section and to measurements in pixels. A pixel is a unit of measure dealing with digital images.
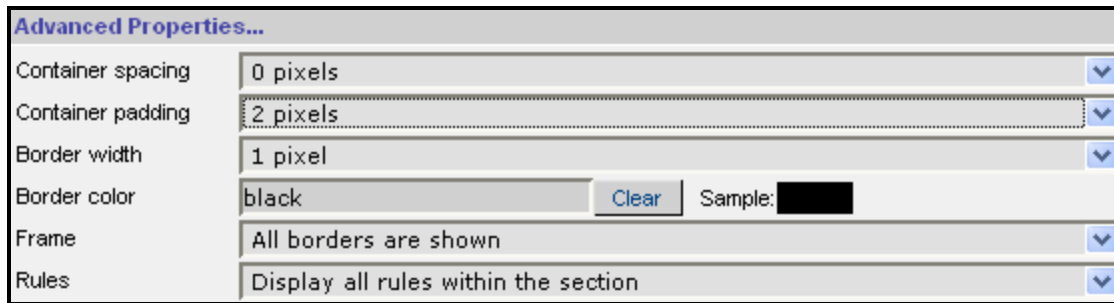
- **Container Spacing** - Choose from the drop-down menu the number of pixels that will appear as 'blank space' between the containers customized for this section.
- **Container Padding** - Choose from the drop-down menu the number of pixels that will appear as blank space between the border of each container in the section and the contents of that container.
- **Border Width** - Choose from the drop-down menu the width of the border for this section in pixels.
- **Border Color** - Click inside the selection box for Border Color to open up the color selection window. This will determine the color of the borders for this section.
- **Frame** - Choose the settings for the Frame. This determines which of the four outside edges of the section's border will appear. Frame can be set to show all borders, two edges at a time, or individual edges.
- **Rules** - Choose the settings for the Rules. This determines which borders inside of the section will appear. Rules can be set to show all inside borders, no inside borders, horizontal borders, or vertical borders.

Font Picker

Click in the text box next to **Font** to display the font selection window. In every part of the Custom Report Designer where fonts may be selected, this process will be the same.

There are several customizations related to font that may be selected from here. The Font Preview section at the bottom will display your current selections.

- **Font** - Choose the name of the font that should be used.
- **Size** - Choose the size of the font.
- **Style** - Choose additional style customizations for the font by checking the box next to the option to be used.
- **Advanced** - Custom Style Sheet Tags. Advanced customizations can be made for the font by clicking on the selection button to the right of the field for Advanced. This will open up the Style Picker window. This function will allow the user to select predefined HTML style tags to be applied to the font.
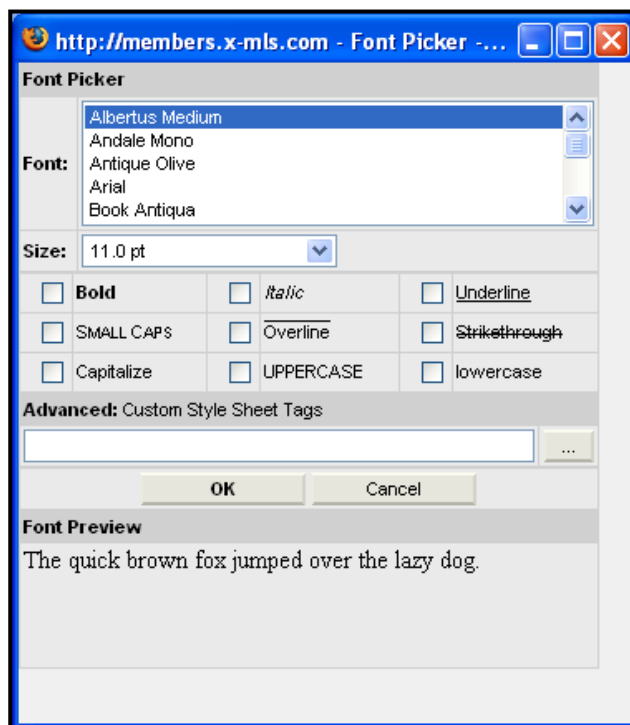
Style Picker

By clicking in the box next to Style, the Style Picker window will open. In every part of the Custom Report Designer where style may be selected, this process will be the same.

Choose the style attribute from the list in step 1. Once a style attribute is chosen in step 1, a description window will appear. This window will show the HTML syntax for the specified attribute. An explanation is found for the selected attribute as well as an example.

Type the details of the selected style attribute in the text box. If a style attribute that specifies color is selected, the option to click on the Color Picker button will appear. Click the **Apply Style** button to save this style.

The selected style attribute string will now appear in the window at the bottom. If this is the style that should be in the report, click the **Save** button. This will close the window. The style sheet tags will now appear in the text box. Click the **OK** button to close the Font Picker window. To clear all selections and start over, the **Clear Font** button may be used.

Color Picker

By clicking in the selection box, the Color Picker window will open. In every part of the Custom Report Designer where color may be selected, this process will be the same.
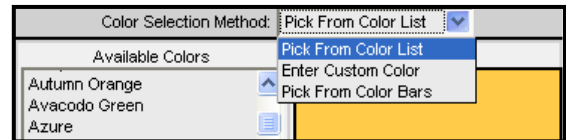
From the drop-down menu at the top of the window, choose the Color Selection Method that you would like to use to choose the color.

- **Pick from Color List** - With this method, a color will be chosen from the pre-defined list on the left side of the window labeled **Available Colors**. Once a color is chosen, the Color Preview window on the right side will reflect the selected color. Click **OK** to save the changes. Click **Cancel** to exit without saving the changes.
- **Enter Custom Color** - With this method, an HTML color name must be typed into the field in the upper left corner of the window. Once the color name is typed into the field, click the **Preview** button and the Color Preview box on the right side of the window will reflect the color chosen. Click **OK** to save the changes. Click **Cance**l to exit without saving the changes.
- **Pick from Color Bars** - With this method, the color is chosen by using the Red, Green, and Blue color bars. Select a color by clicking on the red, green, and blue color bars on the left side of the window, or by entering values in the text boxes. The selected red, green, and blue values will be mixed to produce the color in the preview box. Click **OK** to save or **Cancel** to exit without saving.