

Creating a Custom Report in Realcomp Online®

1. To begin creating a custom report, you must first enter search criteria and run a search. Once the results are displayed in your default format, use the “Select a different format” drop down list to select *Design New Report*. This option will be at the end of that list. The Create New Custom Report Screen will display. See figure 1.

The screenshot shows the 'Create New Custom Report' interface. At the top, there's a title bar with 'Create New Custom Report' and 'Save' and 'Cancel' buttons. Below that, the 'Type' is set to 'RS'. There are two text input fields: 'Report Name:' and 'Description:'. The main area is split into two columns: 'Available fields' and 'Selected fields'. The 'Available fields' column contains a list of field names: ACCESS, ACREAGE, ADDL DOCUMENTS, ADDRESS, APPLIANCES, ARCHITECTURE, AREA, ASSOC FEE, ASSOC FEE PERIOD, BASEMENT, BASEMENT TYPE, and BATH DESC. Between the columns are several buttons: '-- Add -->', '< Remove --', 'Move Up', 'Move Down', and 'Flyer Link'.

Figure 1

2. Click the View List button and select the property types for which you want this new report to be available.
3. Type in a name for this report in the Report Name field (this is required).
4. Type in a description of the report, if desired, in the Description field.
5. The fields that are to be displayed in the new report need to be selected. In order to select them, they must be moved from the Available Fields column to the Selected Fields column. To move a field, either double-click on the field name or click once on the field name to highlight it and click the Add button.
6. To arrange the fields in the order in which you want them to appear, highlight the field name and move it to the correct location using the Up and Down buttons.
7. To include a link to the flyer format, highlight the field that should have the link (such as List Number) and click the Flyer Link button. The highlighted field name will turn red.
8. To delete a custom report, display search results using that format, click the Edit Report button at the top of the page. The Modify Custom Report window will open. Click the Delete link to delete this report format.