Creating Custom Reports

1. Housekeeping Items
   a) Turn off Cell phones, etc.

2. Show MFRMLS Website
   a) Show Training Tab
      i) How to register for classes
   b) Show Rules and Regulations
   c) Tech Support Options
      i) Live Chat
      ii) Suggestions
      iii) Remote Support
      iv) FAQ's

3. Introduction
   a) MLXchange requirements
      i) Mandatory Internet Access
      ii) Internet Explorer V 6.___ higher
      iii) Disable pop-blocker
      iv) Install any necessary ActiveX controls

4. Show Side Bar

5. Report Manager - Add, modify and copy reports using report editor.
   a) Same reports as in MLXchange
   b) Opening a system report and saving under a new name
   c) We suggest to put MY in front of report name to designate this is a personal agent report
   d) After saving, you can click on Preview. Make sure to have an ML number.
   e) Changing grid setup from 12 to 16 pts to allow fields to be placed closer together
   f) You are able to:
      i) Remove/Add Fields
      ii) Change Font size, color, etc.
      iii) You can select multiple fields for deletion or moving
      iv) Combining Fields
      v) Calculation
      vi) Add Images
         (1) Property
         (2) Agent
         (3) Company Logo
      vii) Add other fields
         (1) Time
         (2) Date, etc.

Notes:
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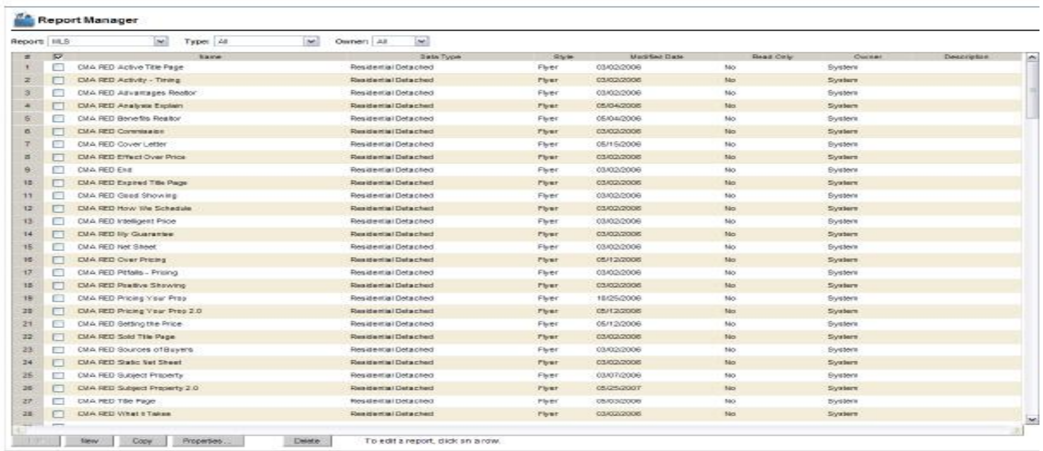
Working with the Report Manager

MLXchange features a Report Manager and online Report Editor to give you complete control over creating and managing flyer-style listing reports. In addition, you have statistical reporting capabilities for analyzing market trends and determining agent and office performance.
The list of reports can be quickly and easily sorted, rearranged, and filtered with each column giving you an overview of reporting details.

From the main menu, click **Reports > Report Manager**. The Report Manager main page opens.



1. From the Report Manager page, you can change the list view by:
   - clicking a column header to sort the list in ascending or descending order.
   - dragging and dropping a column header to a new location to rearrange the column order.
2. Narrow the list of records displayed by applying a simple filter. Click one of the following drop-down lists:
   - **Report** — choose a report category, for example, **MLS** or **Tax**.
   - **Type** — select what kind of reports you want to view, for example, **All**, **Residential** or **Open House**.
   - **Owner**, click the drop-down list and choose **All, System, Office,** or **Personal.**
3. Select one or more reports, then use the buttons in the bottom left corner to perform specific actions.
   - **Edit** — modify an existing report.
   - **New** — create a new report.
   - **Copy** — copy an existing report.
   - **Properties** — change the name and type of an existing report.
   - **Delete** — delete an existing report.

NOTE! *You can only edit, rename or delete Personal reports that you created yourself. The MLXchange pre-designed System reports are NOT editable. You must make a copy of a System report and rename it after making changes.*

Creating a New Report

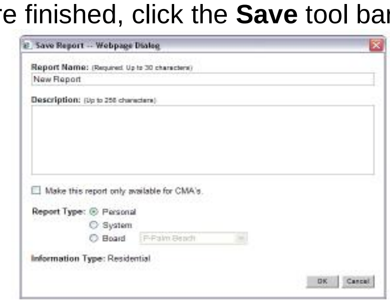
You can create a new report from scratch, or copy an existing report to use as a template for your new Personal report.

1. From the Report Manager page, click **New**.

   The New Report dialog box opens in conjunction with Report Editor.

2. From the **Report** drop-down list select a category, for example **MLS**.
3. From the **Type** drop-down list, select the kind of report you want to create.
4. Select a report format from the format gallery.
5. Click **OK**.

   The Report Editor opens with the corresponding report type data fields.
6. Use the editor's functionality to design the report.
7. When you are finished, click the **Save** tool bar icon. The Save Report dialog box opens.



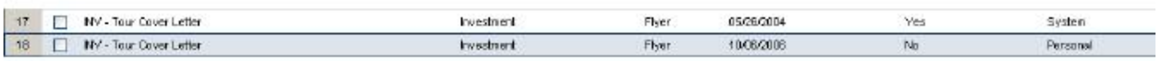
8. Enter the **Report Name** and an optional **Description**.
9. Select the **Make this report only available for CMAs** check box to enable this function.
10. Select a **Report Type** option button: **Personal**, **System** or **Board**.
11. Click **OK**. The *"Report has been saved"* message box appears.
12. Click **OK** and click **Close**. You are returned to the Report Manager page where the new report is displayed in the list.

Copying an Existing Report

NOTE! *You can only edit, rename or delete 'Personal' reports that you created yourself. The MLXchange pre-designed System reports are NOT editable. You must make a copy of a System report and rename it after making changes.*

1. From the Report Manager page, select the report you want to copy.
2. Click **Copy**. The Report Editor opens.
3. Use the editor's functionality to re-design the selected report.
4. Click the **Select category** drop-down list in the upper left corner and choose the category to which the report will be saved.
5. Click the **Save As** tool bar icon. The Save Report dialog box opens.
6. Enter a new **Report Name** and an optional **Report Description**.

   Note: If you accept the original report name, your new report will be saved with the same title as the original report. The difference is your new copy is a Personal report that you can edit, whereas, the original is a System report that is read-only.



7. Select the **Make this report only available for CMAs** check box to enable this function.
8. Select a **Report Type** option button, for example, **Personal**.
9. Click **OK**. The *"Report has been saved"* message box appears.
10. Click **OK** and click **Close**. You are returned to the Report Manager page where the copied report is displayed in the list.

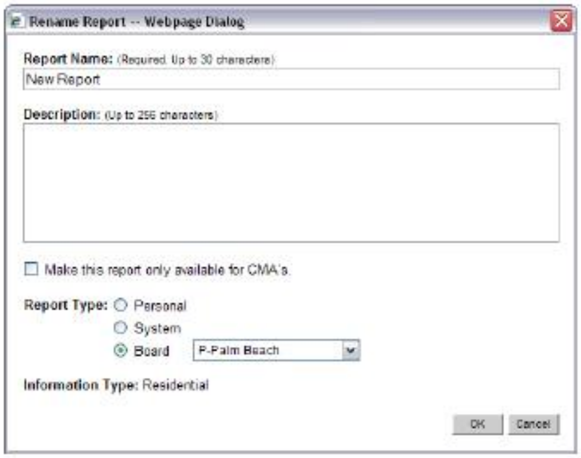
Editing a Personal Report

1. From the Report Manager page select the report you want to edit:
   - click the report line item directly; or
   - click the check box of the target report, then, click the **Edit** button.
2. The Report Editor opens. Make changes to the report.
3. When you have completed your modifications, click the **Save** tool bar icon. The Save Report dialog box opens.
4. Click **OK**. A message box appears confirming the report has been saved.
5. Click **OK and cl**ick **Close**. You are returned to the Report Manager page.

Changing Report Properties

The **Rename** button has been changed to a **Properties** button, letting you change the report name and type.

1. From the Report Manager page, select the report you want to rename.
2. Click **Rename** and the Rename Report dialog box opens.



3. Change the **Report Name**.
4. Enter the **Report Description**.
5. Select the check box if you want this report to be available to CMAs.
6. Select a **Report Type** option button: **Personal**, **System** or **Board**.
   - if you selected **Board**, then click the drop-down list and choose the Board name for which you are modifying the report.
7. Click **OK**.

   A message box appears confirming the report was successfully renamed.
8. Click **OK**.

Deleting a Personal Report

1. From the Report Manager page, select the report(s) you want to remove permanently.
2. Click **Delete**.

   A message box appears, prompting you to confirm the deletion.
3. Click **OK**.

   A confirmation message appears.
4. Click **OK**.

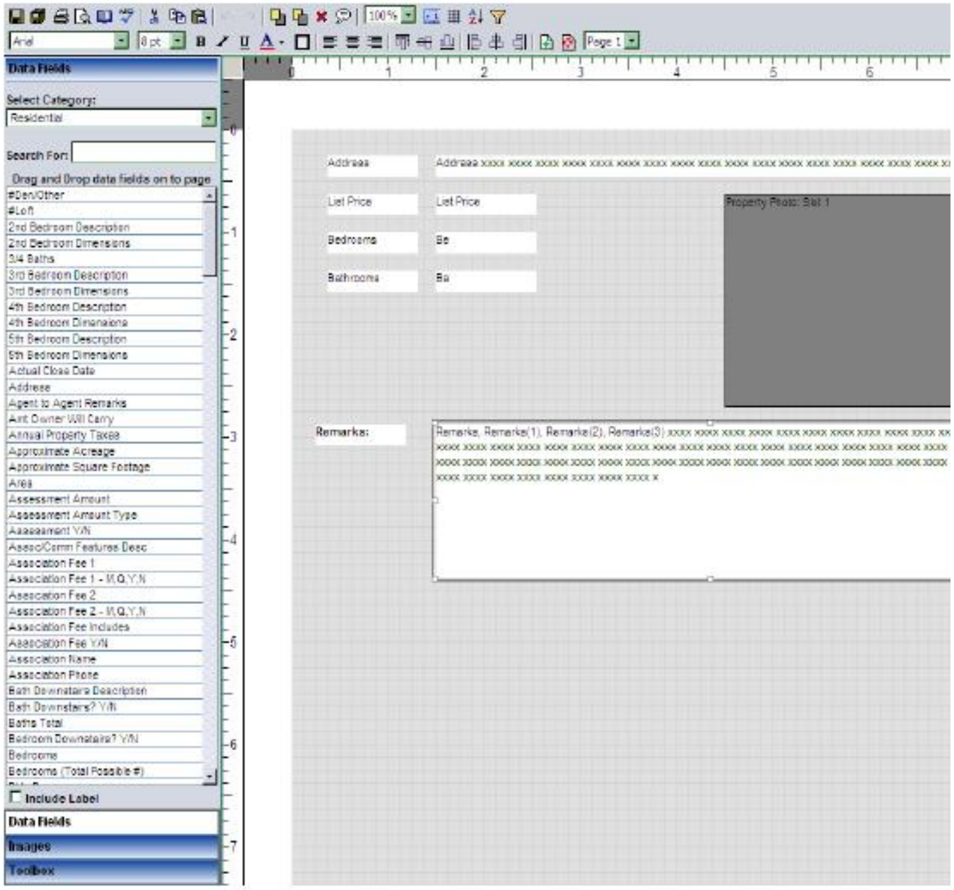
   The reports no longer appear in the Report Manager list.

Using the Report Editor

The Report Editor enables you to design new reports or modify copies of System reports. You can apply word processing-like formatting, insert data fields, objects and more.

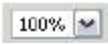
1. From the Report Manager page:
   - click **New** to create a new personal report; or
   - click **Edit** to modify a copy of a system report

The online Report Editor opens.



NOTE! *Using the mouse, point to any tool bar button to see a description of what it does.*

Icon	Description
	**Save** — Saves changes to an existing report. **Save As** — Save as lets you copy the report and save it under another name. **Print** — Sends the report to the printer.
	**Preview** — lets you search for a listing, then preview your report using the information.
	**Page Setup** — Select page size, orientation and set margins.
	**Spell Check** — Lets you check the spelling of labels on the report.
	**Cut, Copy and Paste** — Cut or copy selected text to the clipboard. Paste or insert the clipboard text at the cursor's insertion point.

	**Undo, Redo** — Lets you undo an action or redo an action (to 1 level).
	**Bring to Front**, **Send to Back** — Layer objects or groups of objects from front to back. **Delete Object** — Delete a selected object **Object Property** — Lets you view the property settings for the selected object.
	**Zoom** — Change the page viewing size.
	**Show/Hide Rulers** — Turn rulers on or off.
	**Gridline Options** — Displays the Grid Properties dialog box, letting you adjust the **Grid Spacing**, and enable/disable the **Grid Options**: **Grid Visible** or **Snap to Grid**.
	**Font and Size** — Select the font name and size (in points).
	**Bold, Italic, Underline, Font Color, Outside Border** — Add attributes to selected text. Put a box around a selected object.
	**Align Left, Center, Align Right** — Aligns selected text.
	**Align Tops, Align Middles, Align Bottoms** — Aligns selected objects.
	**Align Lefts, Align Centers, Align Rights** — Aligns selected objects.
	**Add/Delete Page** — Append a new page to the report. Remove a selected page from the report.
	**View Page** — Select a page to view from multiple report pages.

Setting Up a Report Page

To produce a well designed report, use the available guidance tools, like grids and rulers, to accurately line up page elements.

1. Select a zoom level from the **[xxx%]** drop-down list.
2. Click the **Gridline Options** tool bar icon.

   The Grid Properties dialog box opens.

NOTE! *The grid lines are only a design aid; they are not part of the report and will not be displayed when viewing or printing the final report. The grid lines also indicate the usable page area as determined by the **Margins** setting under Page Setup. Objects cannot be placed or moved outside the grid area.*

3. Set the following grid properties, then, click **OK**:
   - **Grid Spacing** — click the drop-down list and select a grid size, for example, 8 Points per inch.
   - **Grid Options** — select the **Grid Visible** check box to display or hide the grid. Click the **Snap to Grid** check box to make objects automatically line up with the grid line intersections when they are moved or resized on the report page.
4. Click the **Rulers** tool bar icon to display (or hide) rulers at the top and to the left of the page.

▶ ↓To set up the report parameters:

1. Click the **Page Setup** icon.

   The Page Setup dialog box opens.
2. Select:
   - **Page size** — Letter or Legal.
   - **Orientation** — Portrait or Landscape.
   - **Margins** — Top, Bottom, Left and Right.
3. Click **OK**.
4. Click the **Select category** drop-down list and choose a type of report.

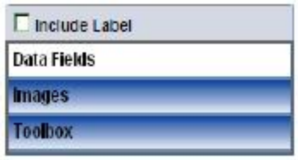
   The corresponding data fields are displayed in a list on the left side.

▶ ↓To manage report pages:

1. Click the appropriate tool bar icon:
   - **Add Page** — a new blank page is appended to the end of the report.
   - **Delete Page** — deletes the page you are currently viewing and all of its contents.
2. To view a specific page number (other than the one you ar currently working on), select the page number from the drop-down list.

Working with Objects

Text labels and image files that can be placed on the report page are all considered “objects” and are categorized into three groups: **Data Fields**, **Images**, and **Toolbox**.



Toolbox objects enable you to add the following features to your report:

- Text boxes
- Lines
- Frames
- The date on which the report is generated
- The time at which the report is generated
- Page number
- Page count
- Maps
- Charts
- Showing time
- Inline frames

▶ ↓To add Data Fields:

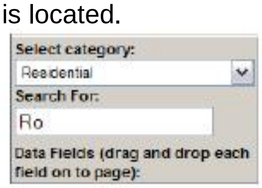
1. Click on **Data Fields** in the category list at the bottom left corner of the page.

   The available field names are displayed in the list.

2. Select the **Include Label** check box to ensure that when you drag data fields onto the form, the names (or labels) go also.

   *Note: It is recommended you select the **Include Label** check box.*

3. To help you search for a data field, enter the first few letters in the **Search For** field to narrow the list to where your label is located.



4. Click and drag one or more data field objects from the list onto the page.

   Note: This is where it's nice to have the grid lines and rulers displayed for easy line-up.

5. Use the tool bar buttons as needed.

▶ ↓To add Images:

1. Click on **Images** in the category list at the bottom of the left column.

2. Click the **Select category** drop-down list at the top of the left column and choose an image type (for example **Agent Image**, **MLS Image**, etc.).

   *Note: Select the **image slot number**, if required.*

   The corresponding image merge codes appear in the list.

3. Click and drag one or more image merge code objects from the list onto the page.

   A box representing an image appears on the form.

- Some image categories have the **Manage images** link to help add, edit or delete images from the database. The MLXchange image submission window opens. *See: "Managing Images"*.

4. Use the tool bar buttons as needed.

▶ ↓To add Toolbox objects:

1. Click on **Toolbox** in the category list at the bottom of the left column.
2. Click and drag a Toolbox object from the list onto the page.

Note: Depending on the object you select, a dialog may open to request more information.

3. Use the tool bar buttons as needed.

▶ ↓To select one or more objects on a page:

NOTE! *An object must be selected before you can delete it or modify its properties.*

1. Click on the object once.

The object appears 'outlined' to indicate that it is selected.

- to select a group of objects, hold down the ***CTRL*** key while clicking on additional objects.

2. Another way to select a group of objects is to click and drag on an empty area of the page to create a "selection rectangle."

- extend the rectangle around the objects that you want to select. When you release the mouse button, the objects within the rectangle remain selected.

NOTE! *Selecting a group of objects is very useful when you want to apply the same changes to multiple objects at the same time. For example, you can select a group of text objects and then use the Font and Font Size controls to change these properties simultaneously on all of the selected objects.*

▶ ↓To delete an object:

1. Select the object you want to delete.
2. Click the **Delete** icon or press the ***DELETE*** key on your keyboard.

A message box opens, prompting you to confirm the deletion.

3. Click **OK**.

▶ ↓To change the size of an object:

1. Select the object you want to modify.

Each side and corner of the object's selection box displays a small white square (called a 'handle').

2. Click a handle and drag it in any direction to resize the object.

NOTE! *Any portion of an image or text that extends beyond the object's borders will be cut off when displayed or printed. Ensure that the object is large enough to accommodate its contents.*

▶ ↓To change the position of an object:

1. Place the cursor over an object until the mouse pointer becomes a four-way arrow.

   Note: For a Label Object, place the cursor over the edge of the object (but NOT over a handle) to make the mouse pointer become a four-way arrow.

2. Click and drag the object in any direction to reposition the entire object.
3. If two or more objects overlap, specify which object is on top and which is on the bottom using the **Bring to Front** and **Send to Back** icons.
   - select the object you want to bring forward or send back and click the appropriate icon.

   Note: This feature can be especially useful when overlapping images to create an artistic effect.

↓To align a group of objects:

1. Select the group of objects that you want to align as described above.
2. Click one of the **Align** icons.

   The selected objects are aligned according to the selected aspect. For example, if you click the **Align Lefts** icon, all of the selected objects will be moved to the left so that their left edges line up with the edge of the left-most object.

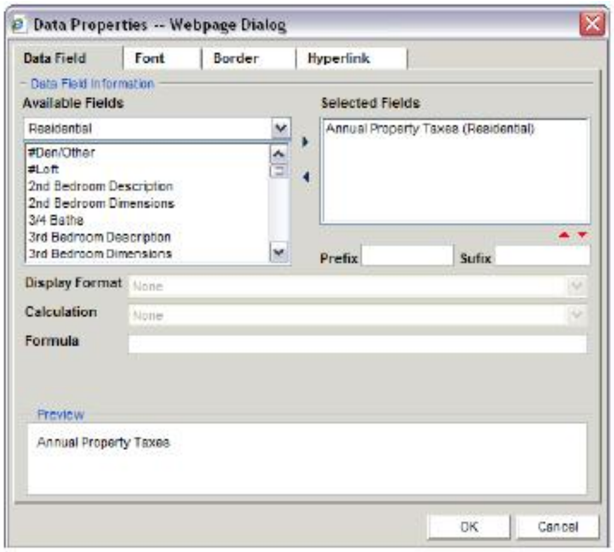
↓To change an object's text formatting:

1. Select the text object(s) that you want to modify.
   - If you are working with a single Label Object, you can use the cursor to highlight and format just a portion of the label's text.
2. Use the tool bar drop-down lists to select a font and point size for the text.
3. Click the **Outside Border** icon to create a black border around the text.
   - use the object handles to change the border size dimensions. Click the icon again to remove the border.
4. Click the **Font Color** icon to change the text to the currently selected color.
   - click the drop-down list to select a new color from the Color window, then click **OK**.
5. Click the **Bold**, **Italic** and **Underline** icons to apply these effects to the text.
   - click the icons again to remove the effect.
6. Click the **Align Left**, **Center** and **Align Right** icons to change the justification of the text within the boundaries of the text object.

↓To work with a selected object’s properties:

1. Select an object, then click the **Object Property** toolbar icon; or double-click the object.

   The Data Properties dialog box opens.



2. Click one of the tabs:
   - **Data Field** — this tab lets you work with the data field information, including two new fields that let you append a **Prefix** or **Suffix** to the fields.
   - **Font** — this tab lets you work with the font style, color, size and alignment.
   - **Border** — this tab lets you work with border style, width and color.
   - **Hyperlink** — this tab lets you enter several types of links: **Navigation** or URL address; **E-mail Link**, **Data Field Links** (for URLs contained in a data field), **Smart Links** (such as Realist.com Tax) or **Report Links** (Listing reports, Media Viewer > Attachments, Charts, etc.).
3. Click **OK**.

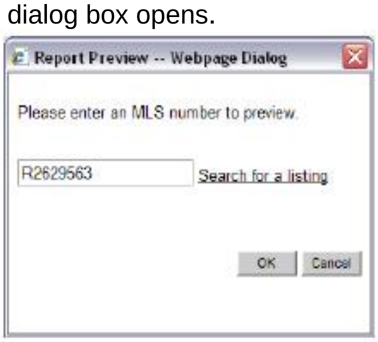
Previewing the Report

You can get a sense of what your report design will look like when viewed with real data. When you retrieve a listing record, its data will replace the data fields on the report template.

▶ ↓To preview a report from Report Editor:

1. From the Report Editor page, click the **Preview** toolbar icon.

   The Report Preview dialog box opens.



2. Click the **Search for a listing** link to retrieve a listing.

   The MLS number appears in the text box.
3. Click **OK**.

The Report Preview page is displayed showing real data from the MLS.

4. Use the toolbar to scroll between multiple pages, zoom in or out, and print the report preview.

Printing a Draft of the Report

You can get a sense of what your report design will look like when printed, and make changes accordingly.

1. From the Report Editor page, click the **Print** tool bar icon.   A standard Windows Print box opens.
2. Choose any additional report options (e.g., number of copies, destination printer, etc.), then click **OK** to print the report.

> **NOTE!** *Reports printed directly from the Report Editor will not show any property information, images, or other data. Merge codes and image placeholders will print exactly as shown on screen.*

1. When you are satisfied with the report, click the **Save** icon.
2. Enter the **Report Name** and the optional **Report Description and c**lick **OK, then, c**lick **Close** to return to the Report Manager page.