

Reports

Find offers several types of detailed and summary reports for presenting your search information to your client. Each customer report displays your branding on each page (as set in your Preferences). Each report displays your branding on each page. Reports can be renamed, saved, printed or emailed.

Creating a Report

These procedures should be done in the order shown.

1. Collect properties for a report:

- Perform a **search** using the desired criteria.
- Select the **desired properties** by:
 - Clicking **Add to Report** at top of the search results list.

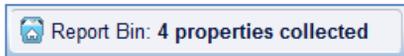


OR

- Hovering over an individual property and clicking **Add to Report** below the property information.



- When you are ready to create the report, click on the **Report Bin**.



The Report Bin opens to display a list of selected properties.



2. Remove properties or change the property order:

- To **reorder**, drag properties into the desired order.
- To **remove a single property**, click the **X** beside the property.
- To **remove all properties**, click **Remove All** at the top of the preview.

3. Preview the report:

- Open the **Report Bin** to display the selected properties.
- Click **Preview** at the top left of the page.



Find displays the default report (Customer Short) on a new tab.

- To **change** the report type, select the desired report type from the **Type** drop-down list.

To rename, print, and/or save a report:

- Click the underlined **My Report** link.
A text edit field displays.
- Enter a **new name** for the report.
- Click **away** to apply the name.

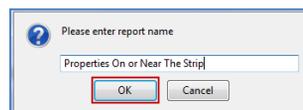


To print without saving, click **Print** at the top of the preview page.



To save the report:

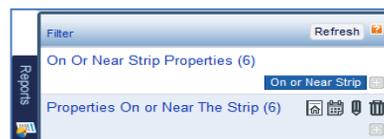
- Click **Save** at the top of the page.
- Enter a descriptive name and click **OK**.



Managing Reports

To access your saved Reports:

- Click the **Reports** sidebar tab.
The Reports list displays.



To modify report information:

- Hover your cursor over a report to display action icons.
 - To **change the expiry date**, click the icon and enter a new date.
 - To **rename a report**, click the icon and enter a descriptive name. Click **Save** when done.
 - To **delete a report**, click the icon and click **OK** to confirm.

To combine two or more reports:

- Create a **new report**.
- Click the **Reports** sidebar tab.
- In the **Reports** list, hover over the report to add.
- Click .
The properties are added to the current report.
- Repeat as required.

To tag a report:

- In the Reports list, **hover** over the report to tag.
- Click the icon.
The Tag dialog box opens.
- Add** the tag information.
- Click **Save**.

Distributing Reports

To distribute a report:

1. Preview the report.
2. At the top of the page, click **Send**.
The *Email Report dialog box* displays.



4. Enter the **email address**.
5. Click **OK**.

The email opens for preview in your client email (e.g. Outlook) containing the information you entered, a subject, and default text including a link to the report.

6. Make any **changes** or **additions** and send the email

Report Type Examples

There are 6 different report types.

1. Customer Short Report:

A list of properties to be presented to a customer. When this report is printed, it displays one property per page.



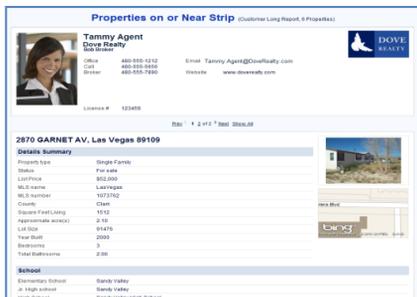
2. Agent Short Report:

The same as the Customer Short report, plus the agent's remarks and listing information.



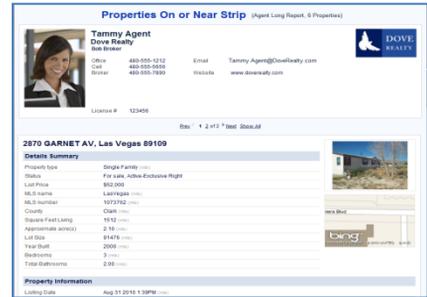
3. Customer Long Report:

Contains the same information as the short report, plus 3 additional sections (Features, Other, Public Remarks)



4. Agent Long Report

The same as the Customer Long report, plus the agent's remarks and listing information.



5. Consolidated Summary Report

Contains a list of selected listings with a list of average values of all the properties.



6. Community Report

Contains school and community information for 1 or 2 zip codes (restricted to 2 zip codes max).



Viewing Saved Reports

To view a saved report:

1. Display the **Reports** sidebar.
2. On the **Reports** list, click the **report name**.



The report opens on a new tab in your browser.