



# flexmls

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## Custom Reports

The Flexmls® Custom Reports module allows you to configure listing reports in a variety of ways. To access custom reports, click My Reports under Preferences on the menu. The following sections of this guide include more information about custom reports:

- [Report Types](#)
- [Customer Flyers](#)
- [Custom Report Editor](#)
- [Add Field Blocks to a Report](#)
- [Edit Individual Reports](#)

### REPORT TYPES

The Custom Reports selection page lists inherited and previously saved custom reports. You can create, edit, and remove reports from this page. When you select a report name on the left, the description is displayed on the right.

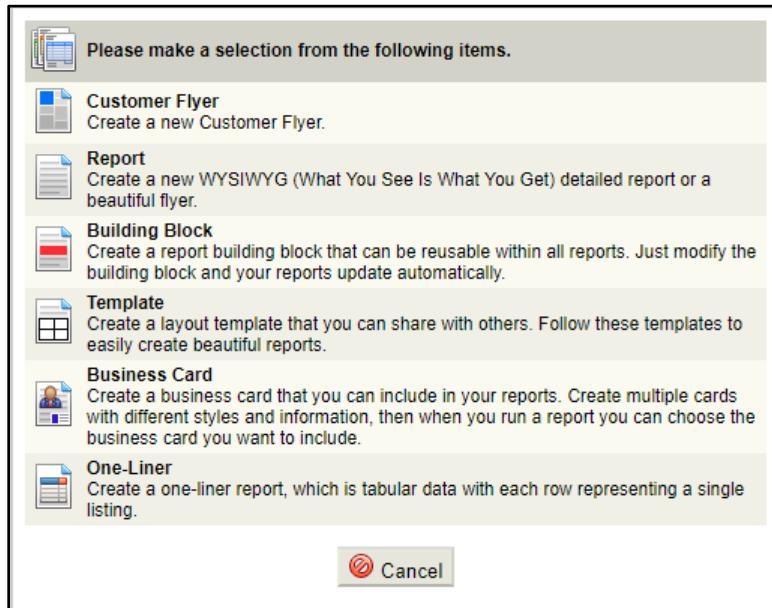
The screenshot shows the 'Custom Reports' page. On the left, there's a sidebar with categories: Reports, Building Blocks, Templates, Business Cards, One-Liner, and Customer Flyers. Under 'Reports', several items are listed: '4 Listing Summary Report [inherited]', '8 Photo Report [inherited]', 'Client Synopsis Report [inherited]', 'Detail Report [inherited]', 'IDX Report [inherited]', 'Synopsis Report [inherited]', and 'Thumbnail Report [inherited]'. Below these, under 'Building Blocks', are '2 - Photo and Map [inherited]' and 'Thumbnail [inherited]'. Under 'Templates', there's a single item: 'Business Cards'. Under 'Customer Flyers', '5 Photo Flyer [inherited]' is selected and highlighted with a blue background. To the right of the sidebar, a large preview window displays the '5 Photo Flyer' report. It shows a thumbnail of a house with a price of '\$389,900'. Below the thumbnail are four smaller images of interior rooms. Further down, there are sections for 'Dimensions' (e.g., 4,000 sq ft, 3 bedrooms, 2.5 baths), 'Details' (e.g., \$389,900, Type: Single Family Home, Status: Active), and 'Additional Info' (e.g., Construction Date: 2010, Heating: Central Air). At the bottom of the preview window, there's a note: 'Information is derived from MLS. See Remarks. © 2010 NCRIS/FBS. Printed on 7/20/2014 at 10:17 AM'.

Note: The Custom Report writer works best when using the most current version of Firefox as your web browser.

To edit an existing report, click on the report and click **Edit**. To rename a report, click **Rename**. To permanently remove a saved report, click on the report and click **Remove**.



To create a new item using the Custom Report Designer, click **New**. You can create a customer flyer, report, building block, template, business card, or one-liner.



## Customer Flyers

Use customer flyer report templates to easily create attractive one-page listing reports. Any field can be added, and multiple color themes are available. Different templates have different layouts for listing information, listing photos, and branding information.

## Report

Reports are created using the Custom Report Designer. This option is the most customizable, with the largest number of fields to select from, page and report headers and footers, and many tools to help fine-tune the appearance of the report.

## Building Blocks

Building blocks are reusable blocks of information that can be inserted into reports. Like reports, building blocks can include a wide variety of listing information, including photos and listing fields. However, building blocks do not include page or report headers and footers. When you update a building block, all reports that contain that building block will update automatically.

## Template

Use templates to set up basic layouts for use in multiple reports. You can share a template with 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 can save multiple business cards. For example, you might use different business cards for your commercial and residential practices.

## One-Liners

One-liners are a type of report where listings are displayed on individual rows, like listing results on a search results page.

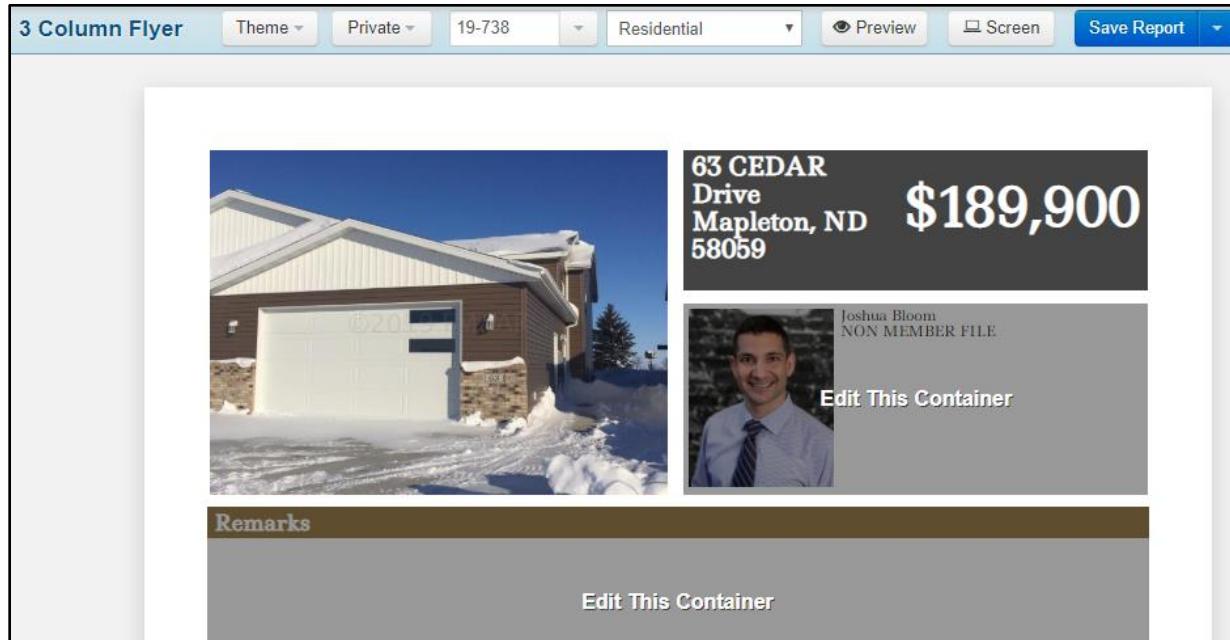


## CUSTOMER FLYERS

Use customer flyers to create professional, clean-looking, one-page flyers that you can print or email to clients. You can also select a customer flyer format to view listing details from a search results page. Customer flyers come with predefined layout templates to make setup quick and easy.

To edit an existing customer flyer, select it from the Available Report Definitions list and click **Edit**.

To create a new customer flyer, click **New** and select **Customer Flyer**. Select a predefined report layout by clicking on it. Different templates have different layouts for listing information, listing photos, and branding information. Once you have chosen a report template, you can modify the report's appearance, edit the fields in each container, and save the report.



### Modify the Appearance of a Customer Flyer

The layout templates for customer flyers are composed of information blocks, or containers. These containers are of fixed size and location to ensure that flyers remain on a single page when printed. You can customize the appearance of a flyer by using the following options:

- **Theme** – Select from preset color schemes. The selected theme will be applied to all your customer flyers.
- **Private** – Select the Private, Public, VOW or IDX version of the flyer. The data shown on the flyer will change based on the access level that is required to view the information. For example, if data is Private, it will not be displayed on the Public version of the flyer.
- **MLS Number** – Select a listing to use as an example as you build the flyer. Enter a specific MLS number or click the drop-down arrow to choose a random listing.
- **Property Type** – Click the drop-down arrow next to the property type to select the property type for the flyer. Different property types will have different available fields.
- **Preview (Edit)** – Click the **Preview** button or **Edit** button at the top of the flyer to toggle between edit and preview modes. By default, the flyer will be displayed in edit mode so that you can customize the content of the containers. Use preview mode to see how the finished flyer will look.



- **Screen (Print)** – Click the **Screen** button or **Print** button at the top of the flyer to toggle between screen and print modes. By default, the flyer will be displayed in screen mode and the contents will automatically resize to fit your screen. Use print mode to see what the flyer will look like when it is printed.

## Edit the Fields in a Container

In edit mode, you can add or change the fields that are displayed in any container that is labeled **Edit This Container**. After you click to edit a container, you can see the container type at the top of the page. Long Text Containers can include individual data fields and detail groups. Short Text Containers can include only individual fields. Photo Containers automatically display the top photos for the listing and are not editable.

**Edit Short Text Container**

Title (optional):  Columns: 1

Click Here to Add Fields

Lot Size X

Lot Acres X

Flood Plain X

Style X

Laundry Location X

Lake X

Gen Tax X

Specials Inst X

Specials Unpd X

High School X

School Dist. X

Subdivision Sally Hilleboe

County Cass

**Update** **Cancel**

<b>Details</b>	
Lot Size	
Lot Acres	
Flood Plain	No
Style	1 Story
Laundry Location	Basement
Lake	None
Gen Tax	2117.0
Specials Inst	0.0
Specials Unpd	0.0
High School	Fargo South
School Dist.	
Subdivision	Sally Hilleboe
County	Cass

You can modify the following attributes of a container:

- **Title** – Click in the Title (optional) box and type the title that will appear in the flyer.
- **Columns** – Set the number of columns of information that will be displayed in the container.
- **Fields** – Use the left-hand column to add fields to the container. Scroll through the available fields or search for a field by typing the field name in the lookup bar. Click on a field to add it to the container. Selected fields appear in the column at the right. Drag and drop fields to rearrange their order. Remove a field by clicking the **X** to the right of the field name.
- **Field Labels** – After adding a field to a container, you can modify the field label by clicking on the name and typing. After you have made your changes, click **Done**.

Lot Size Done **C** X

Lot Acres X

When you are done editing the fields in a container, click the **Update** button at the bottom of the page to return to the Customer Flyers page.

Note: In print mode, if the fields that you have selected do not fit in the allotted container space, you will receive a warning and the container will turn red on the flyer editing page. Fix the overflow by removing fields or by changing the number of columns. An overflow does not prevent you from saving the flyer. When viewed in screen mode, containers with overflow will expand. When you print a flyer or view the flyer in print mode, overflowing content may be cut off.



## Save a Customer Flyer

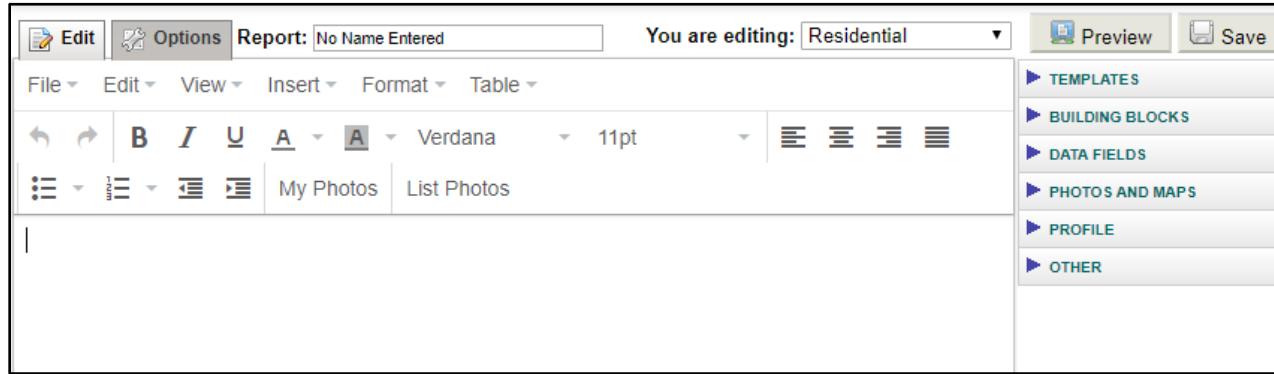
To save changes to an existing flyer, click **Save Report**. To save a new version of a flyer and give it a new name, click **Save As**. After saving the customer flyer, you can use it when viewing listing details and when printing or emailing listings to clients.



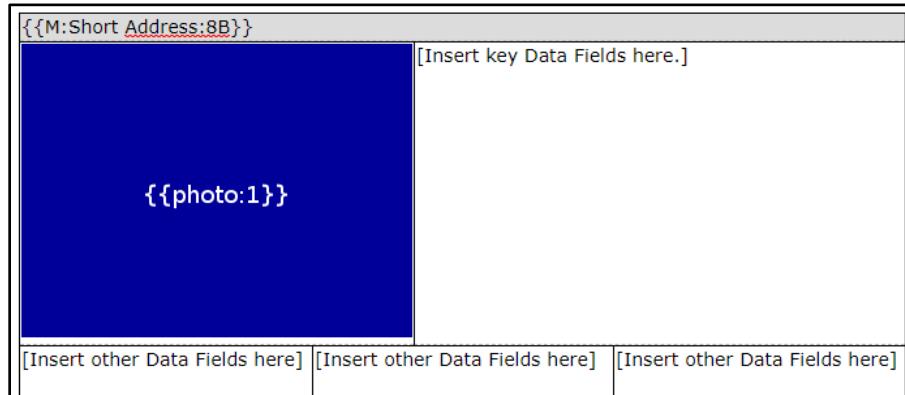
If a customer flyer is created by the MLS, company, office, or broker login, it will automatically be inheritable. To create a flyer that is not inheritable, click **Save As** and uncheck the Inheritable option. By default, Flexmls saves both an uninheritable version of the flyer and an inheritable copy. To delete the inheritable copy, go to the My Reports page. Select the name of the inheritable flyer and click the **Remove** button at the bottom of the page.

## CUSTOM REPORT EDITOR

Use the Custom Report Editor page to customize the look and content of your reports.



When you start a document, the main editing pane will be blank. To begin adding information, click in the editing pane to indicate where to place the first item. Next, choose the type of item to add to the report. Typically, you will begin by adding a template or a table, because templates and tables provide a framework for arranging listing information. If you begin by adding a template, the editing pane will resemble the following image:



Some information appears inside double sets of curly brackets. That information, called a "tag," is a placeholder for listing information. The predefined templates contain tags for data that is common to all property types, such as photos or address information. You can insert the data fields of your choice into the blank areas of the template.

Note: As you are making changes to your report, be sure to click the **Save** button before you close the browser or navigate to another page in Flexmls. The system will prompt you to save the report if you attempt to navigate to another page when changes are unsaved.



The Custom Report Editor is divided into two tabs: Edit and Options.

## Edit Tab

Use the Edit tab to design the layout of the report. You can include a wide range of data in a variety of formats. Use the built-in light word processor to customize the formatting of report text.

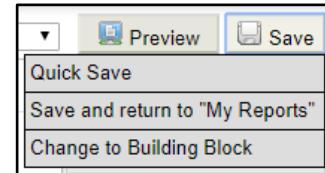
The drop-down list at the top of the page shows the property type that the report is for. You can set up a different layout for each property type in one report.

- **Preview Button**

Generate a report populated with sample data from either a random listing or an MLS number that you select. The preview will open in a separate page. If you select a refresh time, changes that you make to the fields and layout will be updated automatically in the preview as you edit the report. You can also choose to view either the private or public version of the report.

- **Save Button**

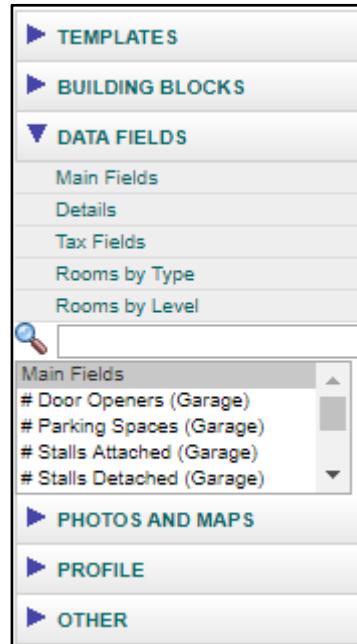
After you have entered a report name, you can save the report at any time. The Save button includes multiple options. Click **Quick Save** to saves the report in its current form without leaving the report editor. Click **Save and Return to My Reports** to save the report and return to the list of available reports. Click **Change to Building Block** to save the current report as a building block and remove it from the report list. If you click the Save button without choosing an option, the report will automatically Quick Save.



- **Tag Selection Panel**

The right pane, or tag selection panel, contains a list of available information fields that you can insert into your report. As you select fields from the right-hand column, coded placeholders (or tags) are inserted in the editing pane. The following options are available:

- **Templates** – Select from a list of available templates.
- **Building Blocks** – Select from a list of saved building blocks or business cards.
- **Data Fields** – Select from the available field types for the current report. For example, when working with a report for commercial listings, the options differ from those available when working with residential listings. Click on a field type, such as Main Fields, to open a page where you can customize the appearance and content of a block of fields. For more information about adding field blocks, see [Add Content to a Custom Report](#).



To find a single data field, scroll through the list or click in the text box next to the magnifying glass and start typing the name.

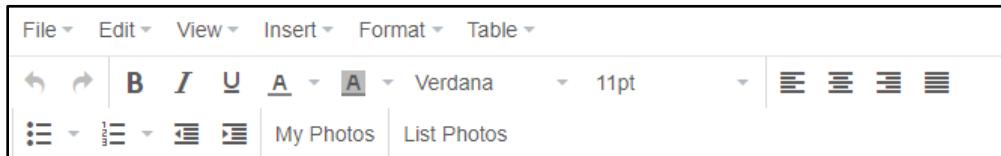
Double-click on a field name to add it to the report. Specify whether to include the Label, Data, or Label & Data on the report; whether to show or hide the label when the field is blank; and whether to use a separator between the label and data. To override the field label, click the checkbox and enter the text that you want to display instead. For example, if you want "List Price: 340,000" to display as "\$340,000," you could override the field label "List Price" with the text "\$".



- **Photos and Maps** – Select from the available photo and map fields. For consistently sized photos and maps, after inserting an image placeholder, click on the lower right corner of the placeholder and resize it to the desired image size. If your report contains multiple listings horizontally, this will ensure that the photos and information line up neatly.
- **Profile** – Select from available member profile information, such as names, phone numbers, and images. Click on a heading to display the available fields.
- **Other** – Select additional information, such as supplements, open houses, and listing counters. For example, you can use text in conjunction with the Listing Counter and Listing Total fields to create a counter such as "Listing 1 of 10" to organize multiple listings in a report. You can also add content that appears only under certain circumstances. For example, click **Private Report Only Section** to create a section where the text and fields you enter between the tags will display only on private reports.

#### • Word Processing Toolbar

Use the word processing toolbar to customize the formatting of report text. Hover the mouse over any icon to see a description of its function.



The following functions and options are available:

- File – Create a new document, preview, or print.
- Edit – Undo, redo, cut, copy, paste, paste as text, select all, or find and replace.
- View – Source code, visual aids, building blocks, or the report preview.
- Insert – Image, link, table, special character, or horizontal line.
- Format – Options for formatting and aligning text.
- Table – Table-formatting options including the following:
  - Table – Opens a grid where you can define the size of a table
  - Table properties – Define the width and height of a table, adjust cell spacing, cell padding, alignment, and borders. Select **Advanced** to define style, select a border color, and/or a background color
  - Delete table
  - Row – Insert, delete, set properties, cut, copy, or paste table rows.
  - Column – Insert or delete columns.
  - Cell – Set properties, merge, or split cells.
- Undo – Reverses the most recent action.
- Redo – Repeats the most recent action that was undone.
- Bold, italics, and underline
- Text color
- Background color
- Font family
- Font size
- Left, center, right, and full justification
- Bullets
- Numbering
- Outdent – Decrease the indentation level of the selected text.
- Indent – Increase the indentation level of the selected text.



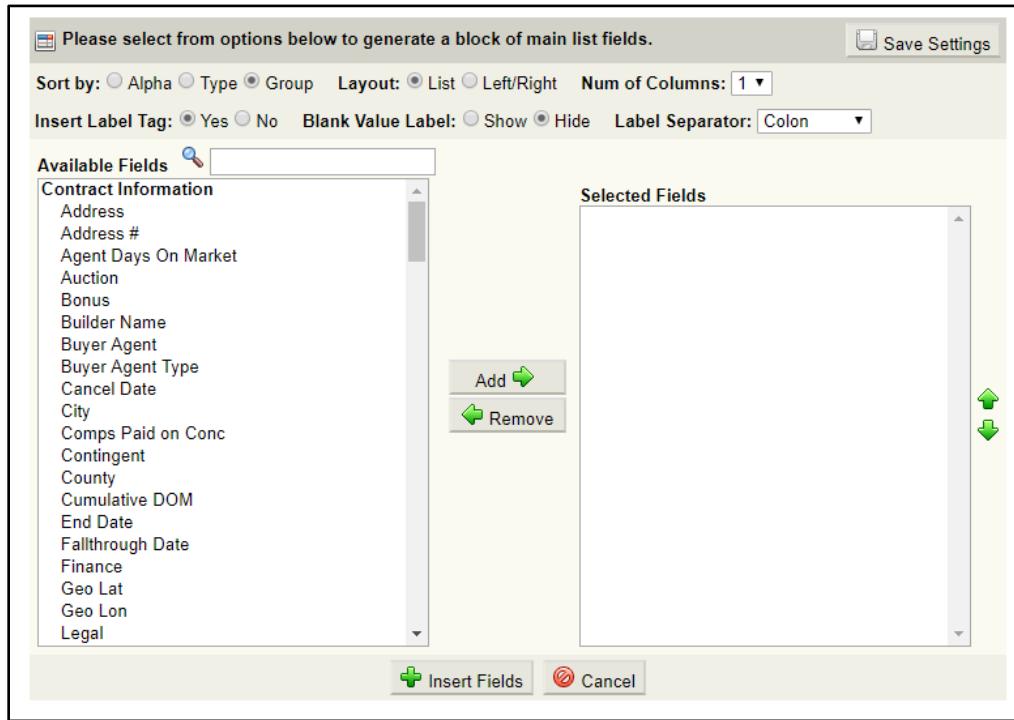
- My Photos – Select a photo from the My Logos and Photos section of your profile.
- List Photos – Enter an MLS number and then select photos from that listing.

## Options Tab

The Options tab contains general formatting options for the report. You can add comments and define the number of listings to display per page horizontally and vertically. You can also indicate whether the report is inheritable, if applicable. If you make your report inheritable, all logins below your access level can use it. For example, the agency login can set up an inheritable report that all the agents in the office can use. Click the checkboxes to automatically bold field labels or automatically put borders around images.

## ADD LISTING INFORMATION TO A CUSTOM REPORT

To insert listing information fields, click **Data Fields** in the tag selection panel of the Custom Report Editor. Select the type of fields to insert (main, details, tax, etc.). The field selection page will be displayed. For example, if you select **Main Fields**, the main fields selection page will be displayed.



Tip: Field selection pages vary slightly according to your MLS and the field type (main, detail, etc.). For context-specific help on any field selection page, click **Help > Help with this page**. Help is available throughout the Custom Report Designer.

## Layout Settings

At the top of the field selection page, you can choose layout options for the fields. The following options may be included, depending on the type of field that you are adding:

- **Sort by** – Select whether to sort the available fields list alphabetically, by type (datatype in the database, such as date, numeric, or text), or by group (field groups on the Add Listing page).
- **Layout** – Choose whether the fields will be displayed in list format or left/right format on the report. List format displays the label and field value separated by a space; left/right format aligns the field values, as in a table.
- **Number of Columns** – Select the number of columns to display the fields in on the report.
- **Number of Details** – For detail fields with multiple selections, choose the number of details to include on the report. Details will appear in the order that they appear in the list.



- **Delimiter** – For detail fields with multiple selections, select the delimiter to use between selections: semicolon, line break, space, or comma.
- **Insert Label Tag** - Choose whether to include the label tag. For example, for the field List Price, if this option is set to Yes, the report entry will be displayed as "List Price: \$325,000." If this option is set to No, the report will show "\$325,000" without the List Price label.
- **Blank Value Label** - Choose whether labels appear when the field value is blank. For example, assume you have included the field Fireplace. If you select **Hide**, and a listing has a blank entry for that field, the Fireplace label will be hidden from the report. If you select **Show**, the Fireplace label will be shown on the report regardless of whether there is data in the field.
- **Label Separator** – Select the character to use to separate field labels from field values. The default separator is a colon. You can also use a line break or no separator.
- **Save Settings** – Save layout settings for future use.

## Select Fields

Select fields from the left-hand column and click **Add** to include the fields in the report. Fields will appear on the report 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 in the list. To remove a field from the Selected Fields list, select the field and click **Remove**.

When you are satisfied with the fields and their order, click **Insert Fields** to add the information to the report. To return to the report without inserting any fields, click **Cancel**.

If you are adding Rooms by Level fields, you can create room groups. Select more than one room and click **Add** to create a group. You will be prompted to enter a label for the group. For example, you might create a group called "Bedrooms" that includes the fields "Master Bedroom," "Bedroom 2," and "Bedroom 3."

## EDIT INDIVIDUAL REPORTS

You can edit individual reports populated with listing data. This feature allows you to fully customize any report on a listing-by-listing basis, rather than changing the format of the base report.

On any search results page, select one or more listings and click **Print**. Select a report type from the drop-down list and click **Preview**. Then click **Edit** to open the report in edit mode. Edit, add, or delete text, delete photos, and adjust the report as needed.

From edit mode, you can e-mail, print, or save the edited report. Click **Save** to keep a copy of the edited report in My Documents. You can then access the report by clicking **My Profile** under Preferences on the menu. On your profile page, click **My Documents**.

**Listings to Print or E-mail**

Current Listing (1)  
 Selected (0)  
 All Results (1077) \*

\* For 200+ listings, only List and Compare may be printed

Version: **Public**

List  
 Detail  
 Standard  
 Standard Style B  
 Details at the side, with photo  
 Print both public and private reports

Supplement  
 History  
 Tax Info  
 Documents  
 Tour of Homes  
 Open Houses  
 Mortgage Calculator  
 Photos  
 Map  
 Compare  
 Messages

Preview and Print in a new window  
[Save / Reset Selections](#)

Preview Edit E-Mail  
Print PDF

Report contains an estimate of 1 pages.

