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#  Class.Net – Help Document

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**Quick Reports – Agent List**

How to produce a list of Agents?

This can be achieved by using the Quick Reports.

The example below explains how to produce a list of all active agents.

It also shows how the criteria can be used to give a further breakdown.

From the main menu select: Reporting / Quick Reports

Alternatively, use the shortcut picture 

**Report Type** – select “Agent”



Click **ADD** to create a new report.

Report owned by – this will show your Class login and is linked to the Permission.

**Permission:**

* Public – other users can amend the criteria and run this report.
* Public Read Only – other users can run this report but not amend the criteria.
* Private – only the ‘owner’ can amend and run the report.

**Name**: Give your report a name

**Code**: a suggestion is to enter your initials

**Date Filter** – this is not applicable for ‘Agent’ type reports.

Now you can add the required fields to the report

Select **Add Item**

Open Agent / Agent

You may want to add the Agent Name, Country, email address and mobile number for example.

Example:



Select ADD to place the fields in to the report.

Select **Close**

The report must contain at least one sort field

Select **Add Sort** -

Open Agent / Agent

Highlight ‘Name’

Select **Add**

Select **Close**

Example of report:



## Exclude: ‘Inactive’

Within an agent record there are up to four available status options:

**Active, Prospective, Inactive, Suspended**

If your report is set to ‘exclude inactive’ it will include only agent records that are active, prospective and suspended.

Therefore, if you wish to report on only ‘active’ agents and/or ‘prospective’ agents you must add an additional field to the report with criteria as follows:

Select **Add Item**

Open Agent / Agent Status

Highlight ‘Name’

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Select **ADD** to place the field in to the report.

Close

Untick the **Include** box so that the status does not appear in the results.

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To add the criteria, select the box with three dots.

**Criteria:**

For Active agents only, highlight **Active**

Select **Set**



Select **Close**

Alternatively for both Active and Prospective agents, highlight both items

Select **Set**



Select **Close**

Once happy with your selection select **Search.**

This will display the list of agents that match your selection criteria.

The number of records found is listed at the top of the screen.

Select **Search & Excel** to produce the list in an Excel Spreadsheet

**TIPS:**

Within an ‘Agent’ quick report you can also use the criteria to be selective by a number of other fields. Some examples are:

Country, Analysis Fields, Visited, Reviewed.