IV. Reports

Within Navica, all users are able to create various **Reports** that calculate their individual productivity. In addition, Broker-level users can create reports that provide them with statistics for their office. Brokers and agents are able to build reports in the **Report Builder** that they can choose to share with other members of the office. Board-level users may also create reports that can they choose to share with all members of the MLS.

Agent Reports

There are two sections of reports, Performance Reports and any Custom Reports that you have created in the Report Builder that will be displayed here. Also available in this section are the NAR Residential Sold Report and the Historical Active Report.

To create an *Agent Performance* **report, follow these steps:**
1. Click **Reports** from the Navica main menu.
2. Under the *Agent Performance* heading, choose a report from the **Production** drop-down menu.
3. Click ➡ .
4. Select your *Sold Date* type, *Date Range*, *Property Types*, and *Areas*, and then click **Generate Report** (Broker-level users may also select which agents on which they would like to run the report).

Agent Performance
The **Agent Performance** reports enable agents to generate reports on their individual sold statistics. For Navica users with *Broker* access, the statistics will include, and be broken down by, each member of the office. The *Reports* under **Agent Performance** include:

- **Market Share Report** - Reports the agent's market share in their office within a specified date range.
- **Sold Market Share**- Reports the number of properties that you sold within a specified date range, regardless of whether you were the listing agent of the property or not.
- **Listed Market Share**- Reports the number of properties that you listed within a specified date range that were sold, regardless of whether you were the selling agent or not.
- **Listed and Sold Market Share**- Reports the number of sold properties, within a specified date range, for which you were the Listing Agent, as well as the Selling Agent.
- **Listed or Sold Market Share**- Reports the number of sold properties, within a specified date range, for which you were either the Listing Agent or the Selling Agent.
- **Listed Not Sold Market Share**- Reports the number of sold properties, within a specified date range, for which you were the Listing Agent, but not the Selling Agent.
- **Sold Not Listed Market Share**- Reports the number of sold properties, within a specified date range, for which you were the Selling Agent, but not the Listing Agent.
- **Agent Inventory –** Reports the agent's inventory within a specified date range for Active Due to Expire, Solds, Expireds and Pendings. Can also include listings in the system that are currently Active, Under Contract, Pending Expired or Sold. This report also includes co-listings for the listing agent.
- **Agent Inventory With Co-List and Co-Sell -** Reports the agent's inventory within a specified date range for Active Due to Expire, Solds, Expireds and Pendings. Can also include listings in the system that are currently Active, Under Contract, Pending Expired or Sold. This report also includes properties in which you are the co-listing or co-selling agent.
- **Listing and Selling Transaction Report –** Reports the number of properties within a specified date

range with what the agent has listed and sold providing credit in volume, percentage and dollar value for both sides of the transaction. It also reports the number of co-op sales for the agent as well as the number of transactions and agent participated in.

- **Market Comparison Report –** Reports the sold number of units and dollar volume for property types comparing one specific date range to another.
- **Market Comparison Report by Price -** Reports the number of sold units and dollar volume grouped by price ranges comparing one date range to another.
- **Activity Reported This Period –** Reports activity grouped by Area, Property Type and Date Range. Includes all statuses, Total Listing Volume, Total Sold Volume and Total Co-op Volume as well as average sales volume and average days on market.
- **NAR Residential Sold Report-** This report will give you total sales by price in a defined date range. It will also give you statistics on *New Listings* that sold within the specified time period, and a breakdown of sales by the type of *Financing*. The **NAR Report** provides stats for the *Residential* property type by default, and includes an *Other* category, which is a second property type that is determined by your MLS.
- **Historical Active Report –** This report will provide a list of active properties within a specified date range regardless of their status now.

Firm Reports

To create a *Firm Performance* report, follow these steps:
1. Click **Reports** from the Navica main menu.
2. Under the *Firm Performance* heading, choose a report from the **Production** drop-down menu.
3. Click ➡ .
4. Select the *Sold Date* type, *Date Range*, *Property Types*, and *Areas* you would like to include.
5. Click **Generate Report** to load the report onto your screen.

Firm Performance
Broker access-level users can generate the following reports that provide sold statistics for each office within the MLS:

- **Market Share By Office –** Report compares your office market share to with all other offices.
- **Sold Market Analysis –** Reports the values of Sales and Co-op Sales grouped by property type and area.
- **Sold Market Share**- Reports the total number of properties sold by each office, within a specified time period, regardless of whether the listing belonged to the office or not.
- **Listed Market Share**- Reports the total number of sold properties within a specified time period that each office listed, regardless of whether the firm was the selling office as well.
- **Listed and Sold Market Share**- Reports the total number of properties, within a specified time period, in which the firm was both the *Listing Office* and *Selling Office* for the property.
- **Listed or Sold Market Share**- Reports the total number of properties, within a specified time period, in which the firm was either the *Listing Office* or *Selling Office*.
- **Listed Not Sold Market Share**- Reports the total number of properties, within a specified time period, in which the firm was the *Listing Office*, but not the *Selling Office*.
- **Sold Not Listed Market Share**- Reports the total number of properties, within a specified time period, in which the firm was the *Selling Office*, but not the *Listing Office*.
- **Listing and Selling Transaction Report**- Reports the total number of units sold for each office, with a breakdown in the number of *Co-op Sales* and *List & Sold by Sales*, within a specified date range.
- **Broker Inventory** – This report allows the Broker to load an inventory of the office's listings. He/she can specify the type listings to be included on the report. The statuses of listings available include: **Active Due to Expire, Solds, Expired, Pending, Under Contract in System, Active Listings in**

System, Pending Listings in System, Sold Listings in System, and **Expired Listings in System**.
- **Sold Percentage of Listed Property** – Reports each agent's list to sale percentage within their office.
- **Activity Reported This Period** - Reports activity grouped by Area, Property Type and Date Range. Includes all statuses, Total Listing Volume, Total Sold Volume and Total Co-op Volume as well as average sales volume and average days on market.
- **NAR Sold Residential Report**- This report will give you total sales by price in a defined date range. It will also give you statistics on *New Listings* that sold within the specified time period, and a breakdown of sales by the type of *Financing*. The **NAR Report** provides stats for the *Residential* property type by default, and includes an *Other* category, which is a second property type that is determined by your MLS.

Report Builder

The **Report Builder** enables you to create personalized reports that include the data fields of your choosing. The types of reports you can create include:

- Listing
- Selling
- Listing and Selling

In addition to choosing the fields for your report, you may also choose the colors and fonts that you would like to use. For Board-level users, you may choose to share your report with other members of the MLS. Broker access-level users are able to create reports that can be shared with other members of their office.

To create a report using the Report Builder, **follow these steps:**
1. Click **Reports** from the Navica main menu.
2. Click the **Report Builder** tab.
3. Select your **Report Type**, and adjust your preferences for **Report Totals**, **Report Border**, **Row Color Divider**, and **Distinguish First Column**.
4. Select the **Calculated Fields** you would like to use in your report. These are the columns of statistical data that will be included in your report. To select more than one field, press and hold your **Ctrl** key while clicking your other choices.
5. Choose how you would like to group your data by clicking a field from the **Select Group By** menu.
6. Type a **Main Title** for your report.
7. Type the **Font Sizes** you would like to use for your report titles and headers (or, you may use the default settings).
8. Select the **Font Colors** and **Background Color**s you would like to use by clicking on one of the color boxes under these headings. This will open up a color wheel for you to click on the color of your choice. Once you have made your selection from the color wheel, click on **OK**. The color code will be placed in the space to the left of the color box.
9. Select your **Font Styles** from the drop-down menu.

Click **Save.** Or, if you would like to look at your report before saving the setup, click **Preview.** Then click the **Close Window** link to return to the *Report Builder* so that you can **Save** the setup.

Custom Reports
The **Custom Reports** enables you to load your customized reports that you created under the **Report Builder**. For instructions on building custom reports, please refer to the section titled **Report Builder**.

To open a Custom Report, **follow these steps:**
1. Click **Reports** from the Navica main menu.
2. Under the **My Custom Reports** heading, click the name of the report you would like to view.
3. Select the *Date Range*, *Property Types*, and *Areas* you would like to include.
4. Click **Generate Report** to load the report onto your screen.