

Agencybloc - How to Pull a Custom Report

1. Click on Reports Module
2. Click on Saved Reports

The screenshot shows the AgencyBloc interface. On the left is a navigation sidebar with categories: Dashboard, Groups, Individuals, Policies, Agents, Carriers, SALES (Sales Pipelines, Sales Opportunities, Leads), USE YOUR DATA (Reports, Email Marketing, Automated Workflow), GATHER DATA (Lead Forms), and RECENT RECORDS (Paul Lalli, Anselma Marmolejos, Felton Geneve, Sherri Crouse, Sherri Crouse). A red circle with the number '1' is around the 'Leads' icon, and a red arrow points from it to the 'Reports' option in the 'USE YOUR DATA' section. The main content area is titled 'Reports' and has three tabs: 'Standard Reports', 'Custom Reporting', and 'Saved Reports'. A red circle with the number '2' is around the 'Saved Reports' tab, with a red arrow pointing to it. Below the tabs are sub-sections for 'Contacts & Records', 'Sales', and 'Audit'. Under 'Contacts & Records Reports', there is a search bar and a grid of report cards: Group, Group Notes, Individual, Individual Notes, Individual Relationships, Policies, Policy Coverages, Cross Sell, Annualized Premium & Application Submissions, Group Enrollment Census, Agents, and Agent/Agency. A green 'Support' button is in the bottom right corner.

3. Search for 'T65'
4. Click on Report name 'T65 Clients and Prospects'

This screenshot shows the 'Saved Reports' section of the AgencyBloc interface. The search bar at the top of the 'Saved Reports' section contains the text 'T65', with a red circle and the number '3' around it and a red arrow pointing to it. Below the search bar is a table of saved reports. A red circle with the number '4' is around the first report name, 'T65 Clients and Prospects', with a red arrow pointing to it. The table has columns for Name, Description, Filters, Sharing, and Last Updated. The first report is 'T65 Clients and Prospects' with a description of 'all of the following apply ...', a 'SHARED' status, and a last updated date of 11/17/2022 8:34:19 AM. The second report is 'U65 prospects OE 2023' with a description of 'all of the following apply ...', a 'PRIVATE' status, and a last updated date of 11/14/2022 4:50:15 P. A green 'Support' button is in the bottom right corner.

Name	Description	Filters	Sharing	Last Updated
T65 Clients and Prospects	all of the following apply ...	all of the following apply ...	SHARED	Livingstone, Melanie 11/17/2022 8:34:19 AM
U65 prospects OE 2023	all of the following apply ...	all of the following apply ...	PRIVATE	Livingstone, Melanie 11/14/2022 4:50:15 P

5. Click download CSV or Download Excel – this will open up a spreadsheet with your list.

Reports

Standard Reports | **Custom Reporting** | Saved Reports

T65 Clients and Prospects SHARED Options
11/17/2022 8:38:16 AM saved by Melanie Livingstone

14 columns [all of the following apply ...](#) [Edit Columns & Filters](#)

Preview Report (showing 17 of 17 results)

Individual ID	First Name	Last Name	Birth Date	Birth Date Month	PhoneNumber	Email	CellPhoneNumber	CountyName	Individual Status	Individual Typ
13287484	Richard	Gill	2/4/1958	February	(407) 404-4524	RGILL0204@GMAIL.COM		Orange	Do Not Call - DNC	Client
13287559	Julie	Peluso	11/21/1957	November	407-876-3126	jkpeluso@aol.com		Orange		Client
13287569	Annetta	Horton	10/12/1957	October	407-333-4744	annettawilson@gmail...		Seminole		Client
13306501	CHRISTINE	CARROLL	1/22/1958	January	941-662-6236	FLASUNGIRL28@OUTL...		Charlotte		Client
13306720	Lisa	Lincoln	2/23/1958	February	407-273-8148	lisablincoln@yahoo.com		Orange		Client
13322676	Molly	Williams	10/22/1957	October	407-461-2079	mshupe1957@gmail.com		Brevard		Client
19953921	Jack	Bundy	2/14/1958	February	3867177432	jbundy51@yahoo.com	3867177432		Initial Call - spoke with ...	Prospect
26133278	Bret	Conway	2/25/1958	February	8639464866	bret_conway@hotmail...	8639464866		Incoming Lead	Prospect
26457264	Ida	Tindall	2/16/1958	February	(407) 463-2633	ITENDALL@YAHOO.COM	(407) 463-2633	Seminole	Left VM	Client
28677590	Gwenevere	Staten	11/20/1957	November	(919) 673-6347	bstatenir@email.com		Orange	Incomine Lead	Prospect

5 Aggregate functions detected. These could be impacted by the combination of unique values in your resultset. Check your preview report for accuracy.

[Download Excel](#) [Download CSV](#) [Start Over](#) [Support](#)

6. Be sure to save the spreadsheet as Excel Workbook (*.xlsx)

Melanie Livingstone

Downloads

T65_Clients_and_Prospects_111722

CSV (Comma delimited) (*.csv)

6 Excel Workbook (*.xlsx)

Excel Macro-Enabled Workbook (*.xlsm)

Excel Binary Workbook (*.xlsb)

Excel 97-2003 Workbook (*.xls)

CSV UTF-8 (Comma delimited) (*.csv)

XML Data (*.xml)

Single File Web Page (*.mht, *.mhtml)

Web Page (*.htm, *.html)

Save