INTEGRATED REFUELLING SOLUTIONS

Customise Report

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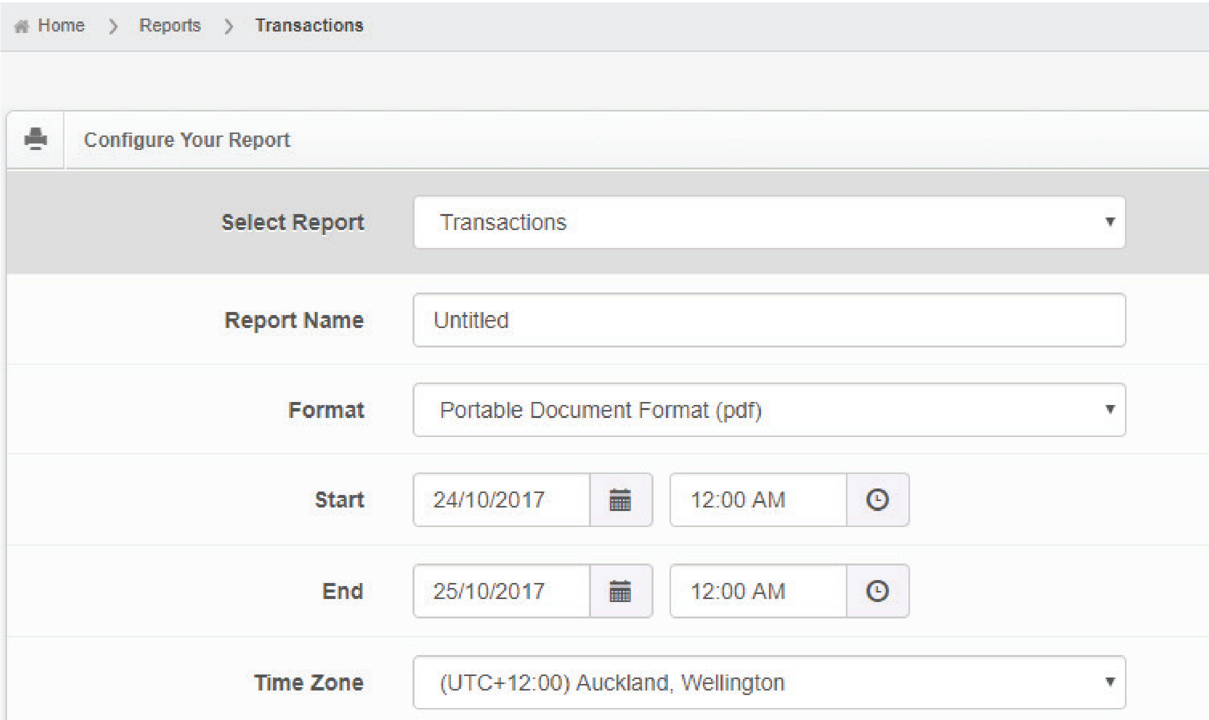
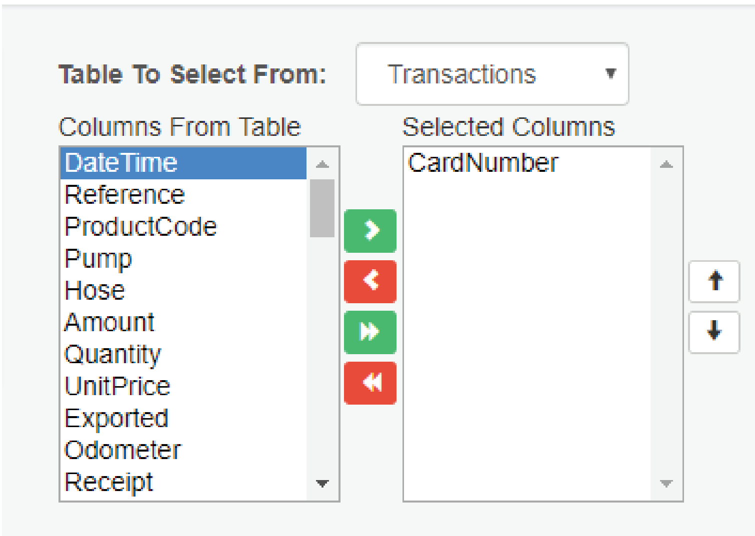
Customise Report

1. Go to Reports>Transactions
2. Select Report is set on Transactions
3. Enter a Report Name
4. Select either Comma Separated Variables (CSV) or Microsoft Excel (xls)
5. Select Start and End Date, leaving the time as 12am unless you have specific report times
6. Time is always set on your local time zone



7. Select the Columns of data that you require on the report
   - Select column name in the first box 'Columns from Table'
   - Select single green arrow to move over selected Column name. Select double green arrow to move everything over. Select single red arrow to move back so it does not appear on report, select double arrow to all Columns back.



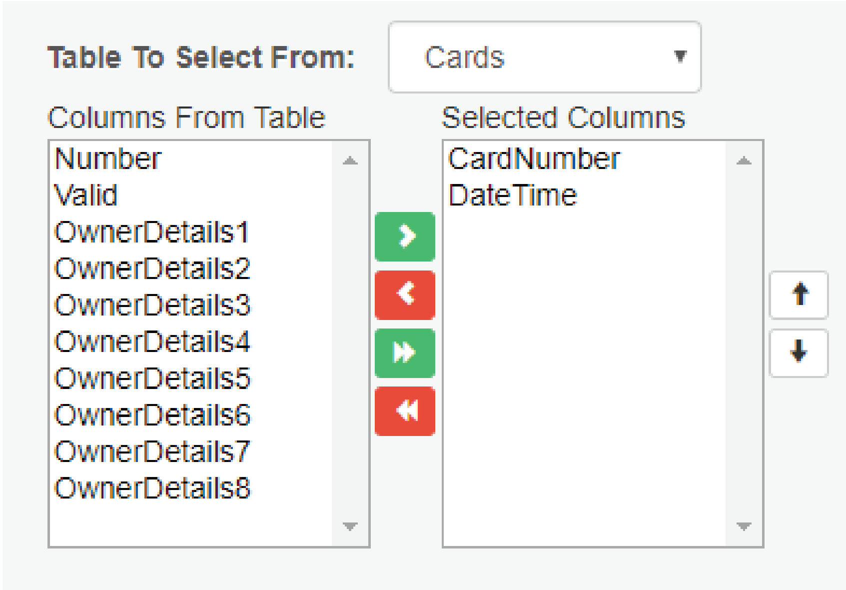
8. Change the Table to Select from Transactions to Cards

9. Select the Columns of data that you require on the report.

 - Select column name in the first box 'Columns from Table'

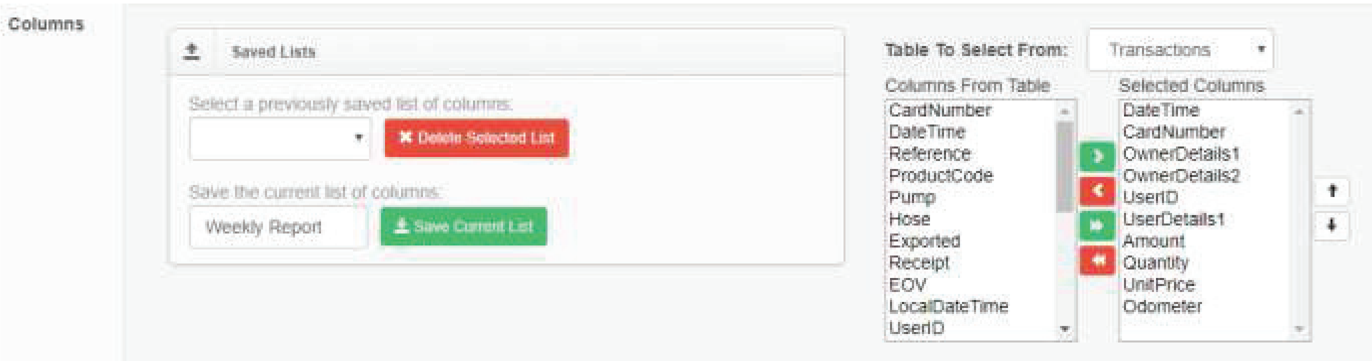
 - Select single green arrow to move over selected Column name. Select double green arrow to move everything over. Select single red arrow to move back so it does not appear on the report. Select double arrow to move all Columns back.

 - To move the selected columns in the right order, selet the column name and press the up or down arrow to put in the correct place.



 - Repeat this process with the UserID Table & Sites Table if applicable.

10. When all the coumns are in the Selected Columns table that are required, go to the saved lists section next to the green tab enter in the report name. ie Weekly Report and select Save Current List.



11. Then select Generate Report at the bottom of the page

12. The site will return to the hom page where the reprot will be processing. Once the status is unread, a link to the report will be available.

Type	Status	Link
Transactions Report	Unread	CSV