



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

The screenshot shows a web interface for configuring a report. At the top, there is a breadcrumb trail: Home > Reports > Transactions. Below this is a header bar with a printer icon and the text 'Configure Your Report'. The main configuration area consists of several rows of controls:

- Select Report:** A dropdown menu currently showing 'Transactions'.
- Report Name:** A text input field containing 'Untitled'.
- Format:** A dropdown menu showing 'Portable Document Format (pdf)'.
- Start:** A date and time selector. The date is '24/10/2017' and the time is '12:00 AM'. There are calendar and clock icons next to the respective fields.
- End:** A date and time selector. The date is '25/10/2017' and the time is '12:00 AM'. There are calendar and clock icons next to the respective fields.
- Time Zone:** A dropdown menu showing '(UTC+12:00) Auckland, Wellington'.

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.

The screenshot shows the column selection interface. At the top, there is a dropdown menu labeled 'Table To Select From:' with 'Transactions' selected. Below this are two columns of controls:

- Columns From Table:** A list of column names: DateTime, Reference, ProductCode, Pump, Hose, Amount, Quantity, UnitPrice, Exported, Odometer, and Receipt. 'DateTime' is currently selected and highlighted in blue.
- Selected Columns:** A list of columns that have been moved to the report. Currently, 'CardNumber' is listed.
- Navigation:** Between the two lists are four arrows: a single green arrow pointing right, a single red arrow pointing left, a double green arrow pointing right, and a double red arrow pointing left. To the right of the 'Selected Columns' list are two vertical arrows: an up arrow and a down arrow.



8. Change the Table to Select from Transactions to Cards

Table To Select From:

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, select 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 columns 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 home page where the report will be processing. Once the status is unread, a link to the report will be available.

Type	Status	Link
Transactions Report	★ Unread	CSV