



# Take advantage of BP Plus Online's recurring report options to help you manage your fleet and costs.

bp BP Plus Online

Hello, Robert Langtree [Logout](#) | [Help](#)

R B Langtree Admin (0111002233)

Current balance \$23,457 Available credit \$76,543

[Account Details](#)

Home Cards Transactions **Reports** Payments Support

### Manage Recurring Reports

All your Recurring Reports are listed below, for you to review and edit

Report Name	Report Type and Detail	Account	Frequency	Status	Number	
<a href="#">MTD Export Card report</a>	Export Card List - PDF Document	All Accounts	Weekly	Active	23	<a href="#">Edit Recurring Report</a>
<a href="#">Fleet 01 Transactions</a>	Export Transaction File - with Headers	0111002244	Monthly	Active	16	<a href="#">Edit Recurring Report</a>
<a href="#">Transaction violations</a>	Excessive Transactions Report - Spreadsheet	0111002244	Weekly	On hold	7	<i>Activate first to edit</i>
<a href="#">All Fleet excl Admin transactions</a>	Export Transaction File - with Headers	All Accounts	Monthly	Active	8	<a href="#">Edit Recurring Report</a>

[Create a new Recurring Report](#)

This is a guide to help you understand how to Manage Recurring Reports on BP Plus Online

## View the video tutorial

These 'How to' video tutorials and PDFs are available at [bpplus.com.au](http://bpplus.com.au)



## What is a recurring report?

A recurring report is a report that you have set up and scheduled to run at defined intervals.

Recurring reports are linked to your User ID. So, when you login to BP Plus Online, only reports set up to recur by you will be displayed.

The **Manage Recurring Reports** screen lists all the recurring reports that you have already set up.

It summarises:

- + Report type and detail
- + Whether the report relates to all accounts, some accounts or an individual account
- + Its frequency and status, and
- + The number of copies of the report already generated.



➤ Accessing recurring reports

**To access a recurring report**

- Select **Manage Recurring Reports** from the main menu under Reports; or
- Click directly on **Manage Recurring Reports** in the Run Reports section on the homepage; or
- Use the **Latest Available Reports** section of the Account Summary panel.
- Click on a Report Name to access to **View All Reports**, which includes all previously run reports for your chosen report type. You can use the filters to reduce the number displayed.

**Did you know?**

If there are a lot of previous copies, you can use the filters to reduce the number displayed.

And you also have the option to download the list as a zip file and save it on your computer.

Account Summary	
R B Langtree Admin (0111002233)	
Current Balance	\$23,457
Credit Limit	\$100,000
Available Credit	\$76,543
Last Bill Amount	\$78,415
Last Payment Received	30/09/13
<b>Latest Available Reports</b>	
BP Plus Generated Reports	
<a href="#">Fleet Control Detail</a>	01/10/2013
<a href="#">Fleet Control - Summary...</a>	01/10/2013
<a href="#">Fleet Control Detail</a>	01/09/2013
<a href="#">Fleet Control - Summary...</a>	01/09/2013

## ➤ Editing recurring reports

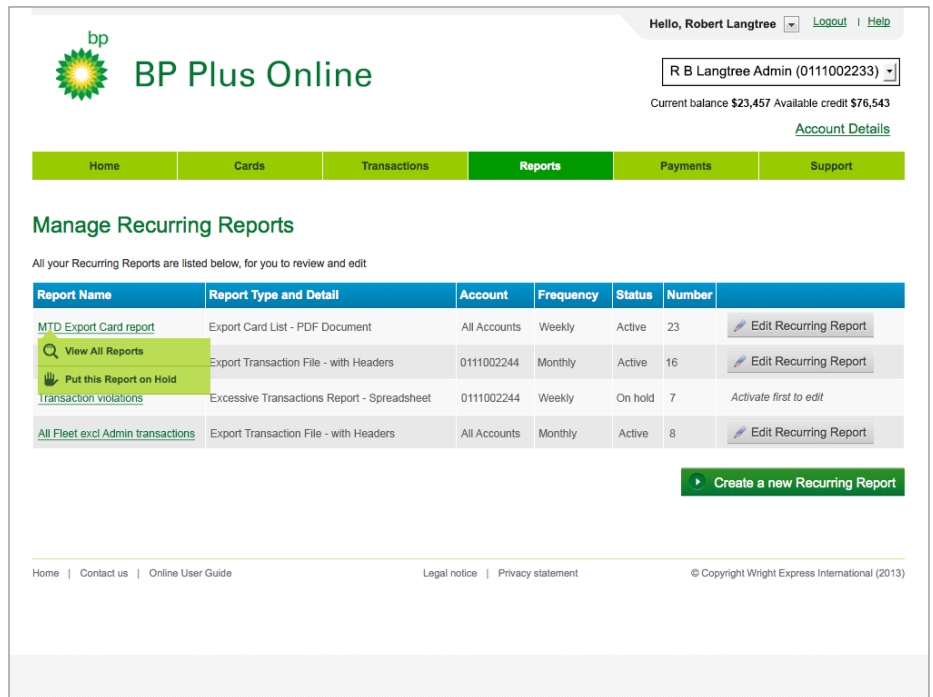
To edit the parameters of a specific report, use the **Edit Recurring Report** button.

You can also:

- + Put a specific report on hold; and
- + Reactivate a report that was previously on hold by clicking on the report name and choosing **Make this report active**.

### Did you know?

To learn how to set up a recurring report, refer to the separate guide called 'How To Run a Report'.



The screenshot shows the 'Manage Recurring Reports' interface. At the top, there's a navigation bar with 'Home', 'Cards', 'Transactions', 'Reports' (highlighted), 'Payments', and 'Support'. Below the navigation bar, the page title is 'Manage Recurring Reports'. A message states: 'All your Recurring Reports are listed below, for you to review and edit'. A table lists reports with columns: Report Name, Report Type and Detail, Account, Frequency, Status, Number, and an 'Edit Recurring Report' button. The table contains four rows of reports. Below the table is a 'Create a new Recurring Report' button. At the bottom, there are links for 'Home', 'Contact us', 'Online User Guide', 'Legal notice', 'Privacy statement', and a copyright notice for Wright Express International (2013).

Report Name	Report Type and Detail	Account	Frequency	Status	Number	
<a href="#">MTD Export Card report</a>	Export Card List - PDF Document	All Accounts	Weekly	Active	23	<a href="#">Edit Recurring Report</a>
<a href="#">View All Reports</a>	Export Transaction File - with Headers	0111002244	Monthly	Active	16	<a href="#">Edit Recurring Report</a>
<a href="#">Put this Report on Hold</a>	Excessive Transactions Report - Spreadsheet	0111002244	Weekly	On hold	7	Activate first to edit
<a href="#">Transaction violations</a>	Export Transaction File - with Headers	All Accounts	Monthly	Active	8	<a href="#">Edit Recurring Report</a>

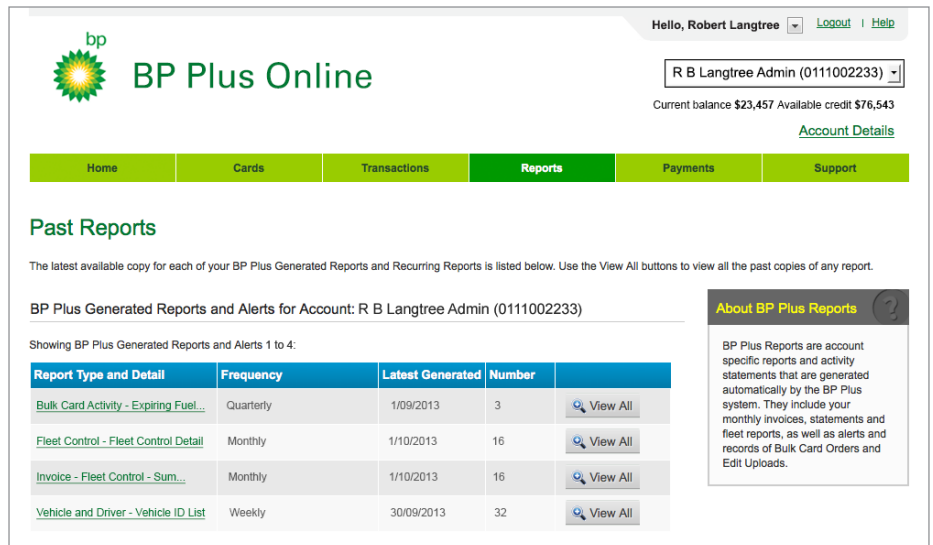
## ➤ Viewing past reports

A comprehensive list of all reports generated for your chosen account is available from the **Past Reports** section.

This section includes two kinds of report:

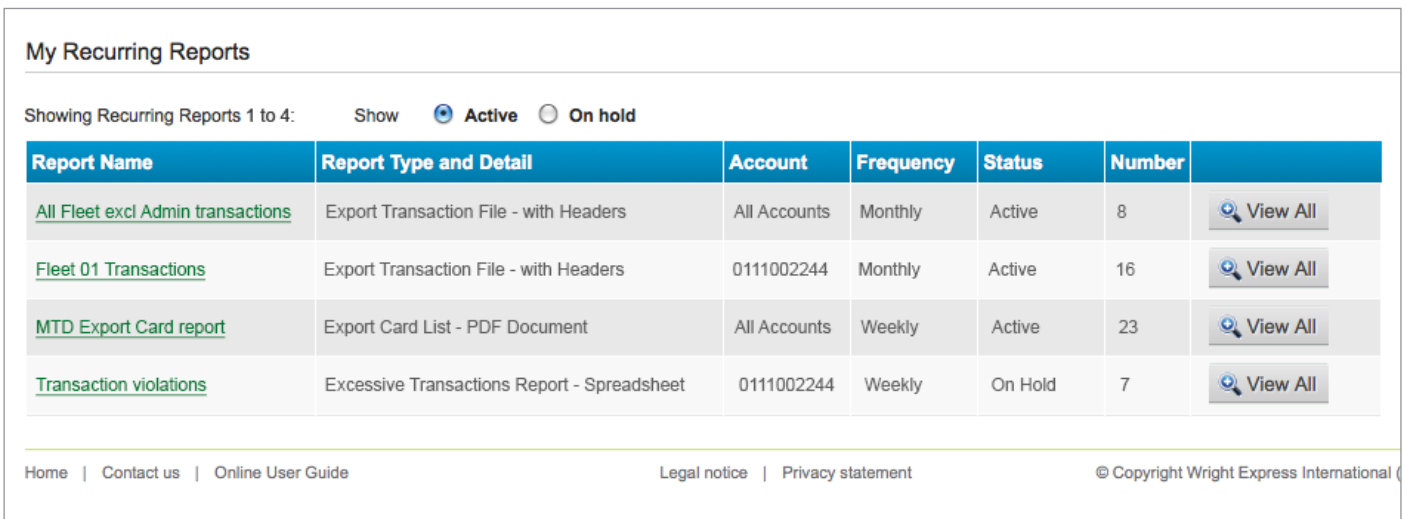
- + **BP Plus Generated Reports**  
These are account-specific reports and activity statements such as monthly invoices and bulk card orders that are automatically generated by the system at regular intervals.

- + **My Recurring Reports**



The screenshot shows the 'Past Reports' interface. At the top, there's a navigation bar with 'Home', 'Cards', 'Transactions', 'Reports' (highlighted), 'Payments', and 'Support'. Below the navigation bar, the page title is 'Past Reports'. A message states: 'The latest available copy for each of your BP Plus Generated Reports and Recurring Reports is listed below. Use the View All buttons to view all the past copies of any report.' Below this, there's a section for 'BP Plus Generated Reports and Alerts for Account: R B Langtree Admin (0111002233)'. A table lists reports with columns: Report Type and Detail, Frequency, Latest Generated, Number, and a 'View All' button. The table contains four rows of reports. To the right of the table is a 'About BP Plus Reports' box with a question mark icon and text explaining that BP Plus Reports are account-specific reports and activity statements generated automatically by the BP Plus system.

Report Type and Detail	Frequency	Latest Generated	Number	
<a href="#">Bulk Card Activity - Expiring Fuel...</a>	Quarterly	1/09/2013	3	<a href="#">View All</a>
<a href="#">Fleet Control - Fleet Control Detail</a>	Monthly	1/10/2013	16	<a href="#">View All</a>
<a href="#">Invoice - Fleet Control - Sum...</a>	Monthly	1/10/2013	16	<a href="#">View All</a>
<a href="#">Vehicle and Driver - Vehicle ID List</a>	Weekly	30/09/2013	32	<a href="#">View All</a>



The screenshot shows the 'My Recurring Reports' interface. At the top, there's a navigation bar with 'Home', 'Cards', 'Transactions', 'Reports' (highlighted), 'Payments', and 'Support'. Below the navigation bar, the page title is 'My Recurring Reports'. A message states: 'Showing Recurring Reports 1 to 4:'. Below this, there are radio buttons for 'Active' (selected) and 'On hold'. A table lists reports with columns: Report Name, Report Type and Detail, Account, Frequency, Status, Number, and a 'View All' button. The table contains four rows of reports. At the bottom, there are links for 'Home', 'Contact us', 'Online User Guide', 'Legal notice', 'Privacy statement', and a copyright notice for Wright Express International.

Report Name	Report Type and Detail	Account	Frequency	Status	Number	
<a href="#">All Fleet excl Admin transactions</a>	Export Transaction File - with Headers	All Accounts	Monthly	Active	8	<a href="#">View All</a>
<a href="#">Fleet 01 Transactions</a>	Export Transaction File - with Headers	0111002244	Monthly	Active	16	<a href="#">View All</a>
<a href="#">MTD Export Card report</a>	Export Card List - PDF Document	All Accounts	Weekly	Active	23	<a href="#">View All</a>
<a href="#">Transaction violations</a>	Excessive Transactions Report - Spreadsheet	0111002244	Weekly	On Hold	7	<a href="#">View All</a>

## Video Tutorials & PDF Guides

A suite of instructional video tutorials and PDFs are available on **bpplus.com.au** and in the BP Plus Online User Help Guide.

- + Introduction to using BP Plus Online
- + Manage your Account
- + Run a Report
- + Manage Recurring Reports
- + Order and Update a Card
- + Order and Update Cards in Bulk
- + Find and Export Transactions



## For more information contact BP

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1300 760 039



**Email your enquiry to**  
AUcustcare@bp.com



**Or contact your**  
Sales Manager

