



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](#)

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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**

- a. Select **Manage Recurring Reports** from the main menu under Reports; or
- b. Click directly on **Manage Recurring Reports** in the Run Reports section on the homepage; or
- c. Use the **Latest Available Reports** section of the Account Summary panel.
- d. 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

  

Latest Available Reports	
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, it says 'Hello, Robert Langtree' with 'Logout' and 'Help' links. Below that is the user name 'R B Langtree Admin (0111002233)' and account balance information: 'Current balance \$23,457 Available credit \$76,543'. A navigation bar includes 'Home', 'Cards', 'Transactions', 'Reports' (highlighted), 'Payments', and 'Support'. The main heading is 'Manage Recurring Reports' with a sub-note: '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: 'MTD Export Card report', 'View All Reports', 'Put this Report on Hold', and 'Transaction violations'. A 'Create a new Recurring Report' button is at the bottom right. Footer links include 'Home', 'Contact us', 'Online User Guide', 'Legal notice', 'Privacy statement', and '© Copyright Wright Express International (2013)'.

## 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. It features the same header and navigation as the previous page. The main heading is 'Past Reports' with a sub-note: '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 is a section titled 'BP Plus Generated Reports and Alerts for Account: R B Langtree Admin (0111002233)'. A sub-note says 'Showing BP Plus Generated Reports and Alerts 1 to 4:'. A table lists reports with columns: Report Type and Detail, Frequency, Latest Generated, Number, and a 'View All' button. The table contains four rows: 'Bulk Card Activity - Expiring Fuel...', 'Fleet Control - Fleet Control Detail', 'Invoice - Fleet Control - Sum...', and 'Vehicle and Driver - Vehicle ID List'. A 'About BP Plus Reports' sidebar on the right explains that these reports are account-specific and include monthly invoices, statements, and fleet reports. Footer links are the same as in the previous screenshot.

The screenshot shows the 'My Recurring Reports' interface. It features the same header and navigation. The main heading is 'My Recurring Reports' with a sub-note: 'Showing Recurring Reports 1 to 4:'. Below this are radio buttons for 'Show' with 'Active' selected and 'On hold' unselected. 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: 'All Fleet excl Admin transactions', 'Fleet 01 Transactions', 'MTD Export Card report', and 'Transaction violations'. Footer links include 'Home', 'Contact us', 'Online User Guide', 'Legal notice', 'Privacy statement', and '© Copyright Wright Express International'.



## 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

BP Plus Virtual Assistant  
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Email your enquiry to  
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Or contact your  
Sales Manager

