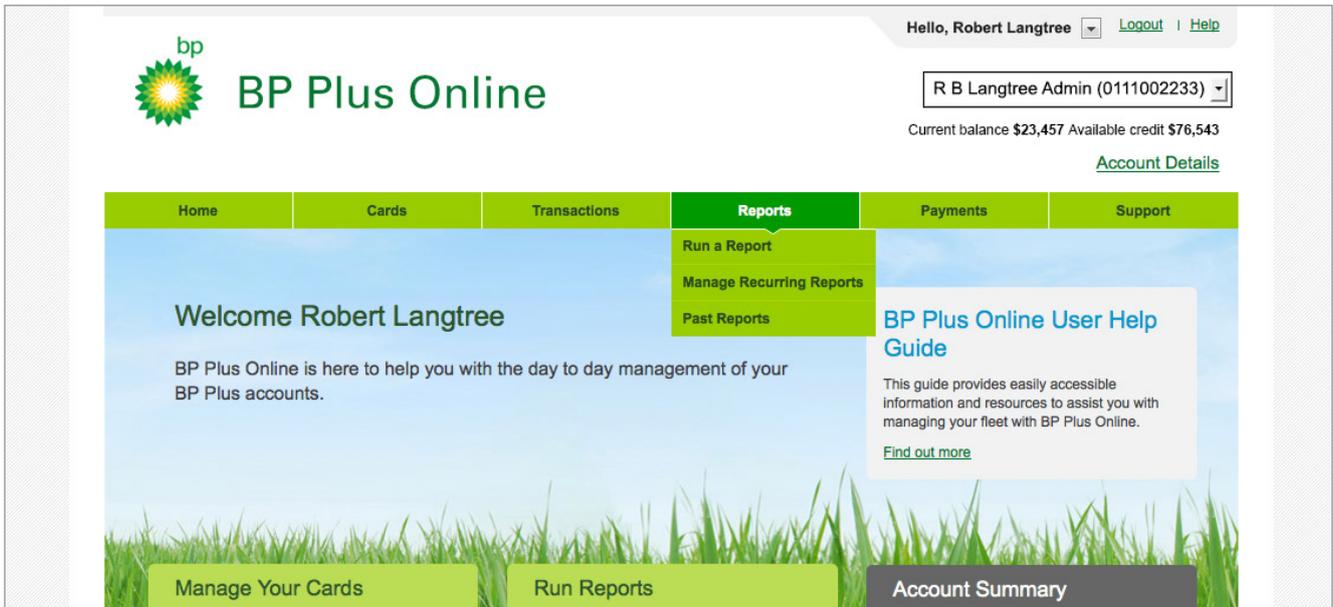




BP Plus Online offers a powerful range of free reporting options that can help you manage your fleet and costs.



This is a guide to help you understand how to Run a Report 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)



Some popular reports are:

**+ Export Transactions**

Monitor transactions against different indicators, across all accounts or a specific account

**+ Unusual Activity**

Also known as Exceptions, to keep a close eye on expenses and quickly identify any unusual transactions

**+ Cost Centre Lists**

Efficiently track costs and allocate expenses to particular areas of your business

**+ Export Card Lists**

Quickly perform audits of all cards across your accounts

**+ Fleet Control Report (FCR)**

Transaction report that can focus on a single Cost Centre, Reference Number, Card Number or Vehicle Registration. Can be run across a date range of your selection.

**+ Odometer Report**

Quickly perform audits of all cards across your accounts



## ▶ Running a report

### 1. Access the **Run a Report** screen

- Select **Run a Report** from the main menu under Reports or
- Click directly on **Run a Report** in the Run Reports section on the homepage

### 2. Select a report

- Select the appropriate report type for your needs
- Select the specific report you want to run from the report details section

#### Did you know?

If you are unfamiliar with the reports available, an **About This Report** panel helps you select the right one by explaining what each contains as you highlight it.

You can refer to the BP Plus Online User Help Guide on [bpplus.com.au](http://bpplus.com.au) for further information.

### 3. Filter the report

- Apply a date range or pre-determined period using the Report Filters
- Further refine by, for example, card number or cost centre, using the Advanced Report Filters

### 4. Schedule the report

- Select 'Run this report just once'
- Choose how you want the report delivered
  - + Download and Display it; or
  - + Have it emailed to either a person in the account's Contacts list or - if the person is not in the list – to an email address provided
- Compress the report into a zip file (only necessary if you expect the report to be large)

- Click **Run Report**

#### Did you know?

You can also choose the report to run across more than one account, by using the **Select Multiple Accounts** function.



➤ Scheduling a recurring report

### Schedule a Recurring Report

Choose suitable settings for your report and select Run Report. Required information is marked with a \*.

#### Report Type

\* Report Type

- Cards
- Cards Activity - Bulk
- Cost Centres
- Emissions
- Fleet
- Fuel Consumption
- Odometer
- Transactions**
- Unusual Activity (Exceptions)

\* Report Detail

- Customised Fleet Control Report
- Export Transaction File - with Headers**
- Export Transactions - Text File - Format 16
- Export Transactions - Text File - Format 18
- Export Transactions - Text File - Format 9
- Export Transactions - Spreadsheet - Format 16
- Export Transactions - Spreadsheet - Format 18
- Export Transactions - Spreadsheet - Format 9
- Export Transactions - Text Comma Delimiter File - Format 16

#### About This Report

The Fleet Analysis report displays your fleets usage statistics, including 'fuel consumption' and ODO readings in PDF format.

This report can be utilised to ensure that all cards within a fleet are being used correctly, and all Odometer readings at the point of sale are being input correctly by drivers.

For more details about the different formats [visit the User Help Guide](#).

#### Report Filters

Use filters to limit the report to a specific date range or account etc.

\* Account [Select multiple accounts](#)

**R B Langtree admin (03740373)**

\* Date from   Or apply a date range: **(Select Date Range)**

To schedule a report to run at regular intervals, go through the first 3 steps for 'Running a report' and choose 'Schedule this as a new Recurring Report, then:

**a. Give the report a name**

Something you will recognise when it is later emailed to you or when you are locating it in a list of recurring reports.

**b. Determine how often you want the report to run**

For example weekly, fortnightly or monthly - noting that the run cycle selected will override any date ranges selected earlier.

**c. Choose how you want it to be delivered**

As an email with the full report attached, or as an email notification with a link to the report on the BP Plus Online portal.

**d. Determine who you want to receive the report**

Select a Contact or provide an email address.

**Did you know?**

To manage your recurring reports on an ongoing basis, or access past recurring reports, view the separate tutorial about 'How To Manage Recurring Reports'.

### Report Scheduling

\* Report scheduling

Run this report just once

**Schedule this as a new Recurring Report**

Recurring Report options

Note: Recurring Report frequency overrides any dates you may have selected above.

\* Report name Helps you identify this Recurring Report later

**My monthly report**

\* Delivery email options

**Email full report as**

Email notification With a link to the report

\* Generate a new report every

**Calendar month** ? Your report will include data

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### Report Delivery

\* Report delivery

Download and display

Send to contact email: **(Select Contact)** ?

**Send to another email:**

Compress email attachment ?



## 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  
BP Plus Online Portal



Email your enquiry to  
[AUcustcare@bp.com](mailto:AUcustcare@bp.com)



Contact your  
Sales Manager

