



How-to take advantage of bp Fuelcard Online's recurring report options to help you manage your fleet and costs.

bp BP Fuelcard Online

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

R B Langtree Admin (0111002233)

Current balance \$23,457

[Account Details](#)

Home Cards Transactions **Reports** 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	
MTD Export Card report	Export Card List - PDF Document	All Accounts	Weekly	Active	23	Edit Recurring Report
Fleet 01 Transactions	Export Transaction File - with Headers	0111002244	Monthly	Active	16	Edit Recurring Report
Transaction violations	Excessive Transactions Report - Spreadsheet	0111002244	Weekly	On hold	7	<i>Activate first to edit</i>
All Fleet excl Admin transactions	Export Transaction File - with Headers	All Accounts	Monthly	Active	8	Edit Recurring Report

[Create a new Recurring Report](#)

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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 Fuelcard Online, only reports set up to recur by you will be displayed.

The **Manage Recurring Reports** section 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

The screenshot shows the BP Fuelcard Online dashboard. At the top right, it says "Hello, Fleet Manager" with a dropdown arrow, and links for "Logout" and "Help". Below this is a dropdown menu showing "XXXXXXXXON LIMITED (0110075580)". To the right of the dropdown, it displays "Current Balance \$ 570.00" and "Account Status: Active" with a link to "Account Details". A navigation bar at the bottom has five items: "Home", "Cards", "Transactions", "Reports" (which is highlighted with a blue box), and "Support". Below the navigation bar, there is a "Welcome, Fleet Manager" message and an "Account Summary" panel.

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.

The screenshot shows a detailed view of the "Account Summary" panel. It includes the account name "XXXXXXXXON LIMITED (0110075580)" and a table with the following data:

Account Status	Active
Current Balance	\$ 570.00
Last Bill Amount	\$ 270.00
Last Payment Received	10/05/2018

Below the table is the "Latest Available Reports" section, which lists "BP Fuelcard Generated Reports" with the following items:

- [Management Transaction...](#) 01/07/2019
- [Card Transaction Repor...](#) 01/07/2019
- [Fleet Control Tax Invo...](#) 01/07/2019
- [Card Transaction Repor...](#) 01/07/2019

There is a "View All" button with a magnifying glass icon. Below this is the "My Recurring Reports" section, which states: "You have no recurring reports, but you can set them up on the [Manage Recurring Reports](#) screen". There is also a "View All" button with a magnifying glass icon.

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?

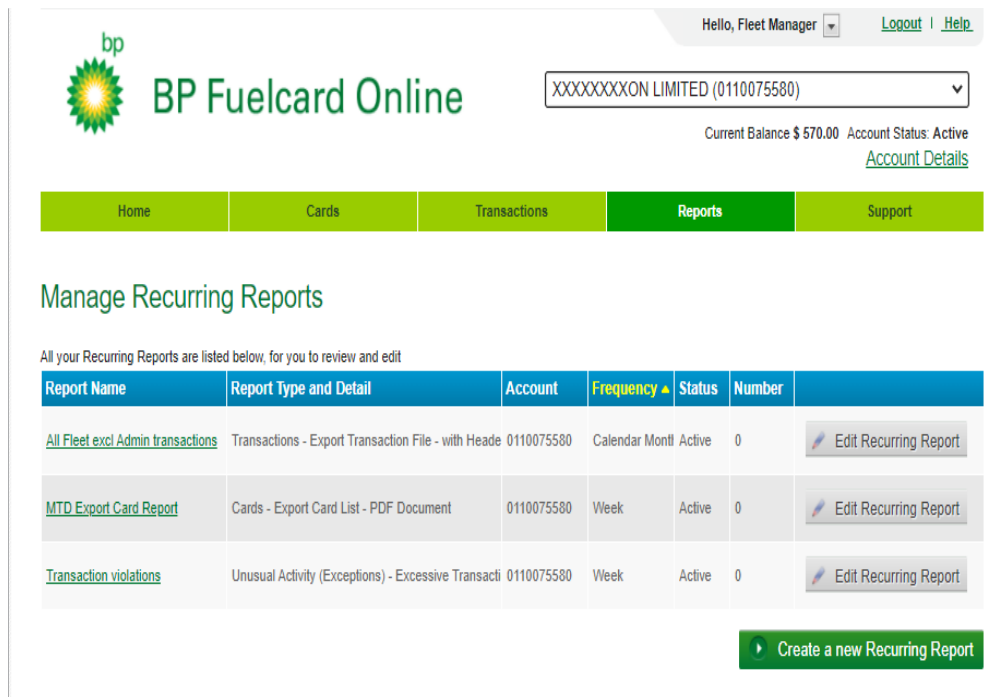
To learn how to set up a recurring report, refer to the separate guide called 'How To Run a Report'.

Viewing past reports

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

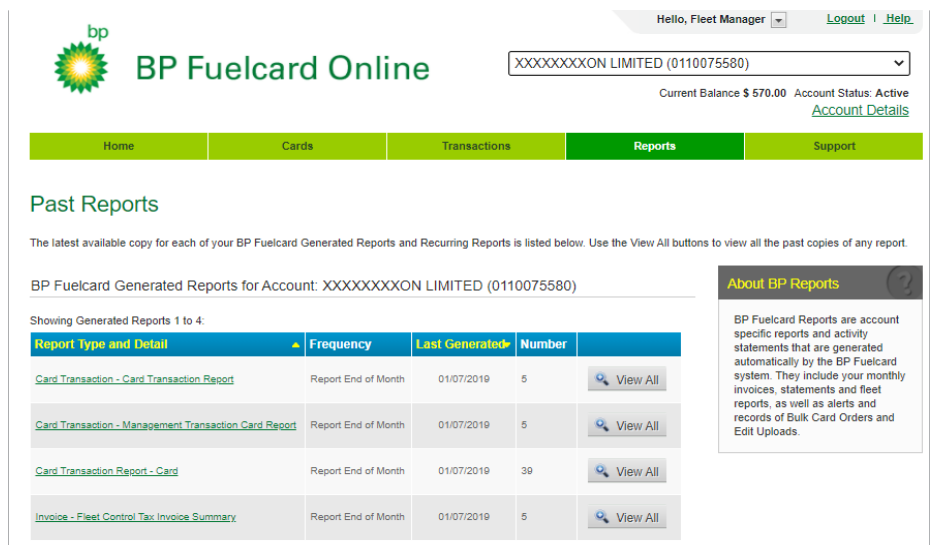
This section includes two kinds of report:

- + **BP Fuelcard 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**



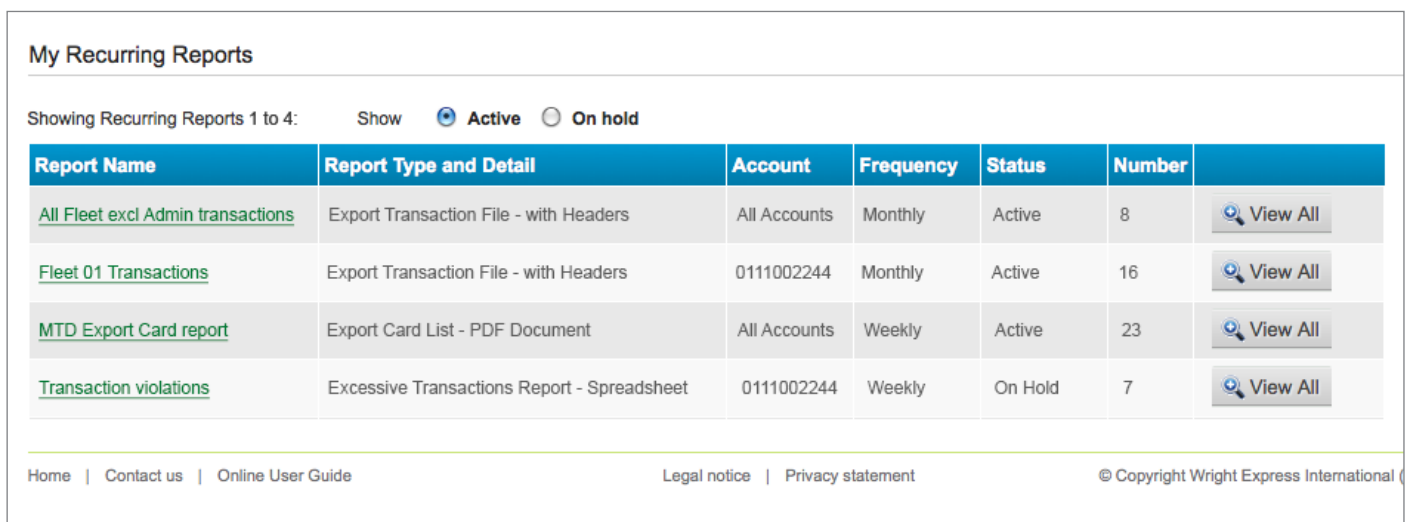
The screenshot shows the 'Manage Recurring Reports' interface. At the top, there's a navigation bar with 'Home', 'Cards', 'Transactions', 'Reports', and 'Support'. The 'Reports' tab is active. Below the navigation bar, the page title is 'BP Fuelcard Online' and the account name is 'XXXXXXXXON LIMITED (0110075580)'. The current balance is \$570.00 and the account status is 'Active'. A table lists recurring reports with columns for Report Name, Report Type and Detail, Account, Frequency, Status, and Number. Each row has an 'Edit Recurring Report' button. A 'Create a new Recurring Report' button is at the bottom right.

Report Name	Report Type and Detail	Account	Frequency	Status	Number	
All Fleet excl Admin transactions	Transactions - Export Transaction File - with Heade	0110075580	Calendar Month	Active	0	Edit Recurring Report
MTD Export Card Report	Cards - Export Card List - PDF Document	0110075580	Week	Active	0	Edit Recurring Report
Transaction violations	Unusual Activity (Exceptions) - Excessive Transacti	0110075580	Week	Active	0	Edit Recurring Report



The screenshot shows the 'Past Reports' interface. It features a navigation bar with 'Home', 'Cards', 'Transactions', 'Reports', and 'Support'. The 'Reports' tab is active. The page title is 'BP Fuelcard Online' and the account name is 'XXXXXXXXON LIMITED (0110075580)'. The current balance is \$570.00 and the account status is 'Active'. A table lists past reports with columns for Report Name, Frequency, Last Generated, and Number. Each row has a 'View All' button. A sidebar on the right contains an 'About BP Reports' section.

Report Name	Frequency	Last Generated	Number	
Card Transaction - Card Transaction Report	Report End of Month	01/07/2019	5	View All
Card Transaction - Management Transaction Card Report	Report End of Month	01/07/2019	5	View All
Card Transaction Report - Card	Report End of Month	01/07/2019	39	View All
Invoice - Fleet Control Tax Invoice Summary	Report End of Month	01/07/2019	5	View All



The screenshot shows the 'My Recurring Reports' interface. It features a navigation bar with 'Home', 'Contact us', 'Online User Guide', 'Legal notice', 'Privacy statement', and '© Copyright Wright Express International'. The page title is 'My Recurring Reports'. Below the navigation bar, there's a section for 'Showing Recurring Reports 1 to 4:' with radio buttons for 'Active' (selected) and 'On hold'. A table lists recurring reports with columns for Report Name, Report Type and Detail, Account, Frequency, Status, and Number. Each row has a 'View All' button.

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



For more information contact bp

bp Fuelcard Virtual Assistant
bp Fuelcard Online
Portal



Email your enquiry to
BPFuelcard@bp.co.nz



Or contact your
Sales Manager

