How to run a report

Reports let you organize, filter, and export the data from your fuel transactions. An account can have an unlimited number of reports and running reports doesn't affect your transaction data in any way, so you're free to customize your reports however you need!

To create a report:

FILL-RITE Fuel Management	Demo Company Demo User My Alerts V	Customer Alerts 🗸		Q Contact	Help A -
Account Setup	Overview				
Overview					
	Tanks overview		Fill-Rite FMS integ	grates with Fleetio	
Customer Assets	0 Critically low tank	s >			
My Assets 🗸 🗸	0 Low tanks	>	Fuel Con to g	and fleet data, all in one p nbine Fill-Rite FMS and Fleet et a complete picture of yo	ace io data ur fuel
Reporting ^			Fleetio Real	d more on our blog.	
My Reports	0 Full tanks	>)			
Summaries					
Tax Forms	Transactions per day		Pump volume pe	r day	
Accounting	Last 7 days	Daily average: 0	Last 7 days	Daily averag	ge: 0 gal
Billing	1.0 \$ 0.8		1.0		
Settings 🗸 🗸	0.0 0.4 0.4 0.2 0.4 0.2 0.2 0.4 0.2 0.2 0.2 0.2 0.2 0.2 0.2 0.2 0.2 0.2		0.6 0.4 0.2		

1. Go to *Reporting* on the left menu and click *My Reports*

 Click Create custom report to create a custom report or select a Prebuilt Report to save time.

FILL-RITE Fuel Management	Demo Company Demo User My Alerts	✓ Custo	omer Alerts 🗸		Q Co	ontact Help A	~				
Overview	My Reports										
Customer Assets	Prebuilt Reports	Prebuilt Reports									
My Assets 🗸 🗸	🛱 Vehicle Fuel Usage	æ	Driver Fuel Usage	Fuel Pumped per Tank		Custor					
Reporting ^	Shows the amount of fuel pumped per vehicle. Sorted by Vehicle Name and includes totals for each vehicle	Shows the amount of fuel pumped per driver. Sorted by Driver Name and includes totals for each driver.		Shows the amount of fuel pumped per tank. Sorted by Tank Name and includes totals for each tank.		Shows the a per custom 1 Sorted by the					
My Reports						includes totc					
Summaries											
Tax Forms	Q Search					Create custom report					
Accounting	Report Name 🗘	File Type	Recurring? 🗘 0/20 used	7	Created 🗘	Sharing 🗘 🧧 🌾	B				
Billing	All Transactions	xisx	No		09/02/2018 07:38 PM	Not Shared 🕻	> ~				
Settings 🗸											
QR Codes											

Create a custom report

1. Select what data you would like to include in your report. Each data item you select will become a column in your report.

FILL-RITE Fuel Management	Demo Company Demo User	My Alerts 🗸 Customer Alerts 🗸	Q Contact	Help	<u>۸</u> •
Overview	What data de	o you want to include?	Exit & discard	Next	
Customer Assets		Q Search_ Select All	Deselect All		
My Assets 🗸 🗸		Transaction Select All Deselect All			
Reporting ^		Activity Cost Date Group ID Group Type Mode Pu	ump Name		
My Reports		Source Status Taxed Time Transaction ID Transaction N	Notes		
Summaries		Volume			
Tax Forms					
Accounting		Driver & Vehicle Select All Deselect All			
Billing		Driver Code Driver ID Driver Name Vehicle Code Vehicle ID	Vehicle Name		
Settings 🗸 🗸					
QR Codes		Tank & Inventory Select All Deselect All			
		BOL # Currency Code Inventory (After) Price Per Unit Product			

- 2. Choose your **Date Range** (Note: for more information on recurring reporting see Recurring Reports)
 - Any transactions that were created within your selected Date Range will be included in your report. Quick date range options include All time, Today, Yesterday, Last 7 days, Last Week, Last 14 days, Last month, Last quarter, and Last 12 months. If you want more control over Date Range, use the Custom option to select any two dates you prefer.

FILL-RITE Fuel Management	0	Demo Company Demo User	My Alert	ts 🗸 Customer Ale	rts 🗸				٩	Contac	t Help	٨ •
Overview	I	Daily Report	C					Đ	kit & discard	4	Save	
Customer Assets	C	Date Range								Exclude (?)		
My Assets		All time	^	 Previewing a limited nu 	Imber of rec	ords.				None		•
Wy Assocs		All time		Data	djust to	local time	e (?)	s	ort & Filter	Ado	d/Remove data	
Reporting ^		Custom		Includes data from the previous day.) ()	8	Activity 🗘	Ø	Date 🗘	0	Time	6
My Reports		Yesterday	-	Recurring Delivery	-	<u> </u>						<u> </u>
Summaries		Last 7 days	-0	Dully			Pump		2025-01-07		09:28:23 AM	
Tax Forms		Last week	•									
Accounting		Last 14 days Last month	9: 9:									
Billing		Last quarter	-0									
Settings 🗸 🗸		Last 12 months										
QR Codes												

- 3. Choose which data to **Sort & Filter** your report by. The default sorting is by transaction date.
 - Filters let you customize your report so it only contains the transactions you need to see. If you only wanted transactions from a specific Driver, you would use Filters. Filters can be used for as many fields as you need, they let you narrow how much data is included in your report.

FILL-RITE Fuel Management	Demo Company Demo User My Alerts V Customer Alerts V	Q Contact Help A -
Overview	Daily Report 🛛 🖉	Exit & discard Save
Customer Assets	Date Range All time O Previewing a limited number of records.	Exclude ⑦ None
My Assets 🗸	Show totals () Disable headers () Adjust to local time ()	Sort & Filter Add/Remove data
Reporting ^ My Reports	III Transaction ID III Status III Group ID III Activity	 Ø Ⅲ Date ↓ Ø Ⅲ Time Ø
Summaries	955ftc6d-7bf6-48e0- Pump 9lb0-b2l393cdl069 Pump	2025-01-07 08:28:23 AM
Tax Forms Accounting		
Billing		
Settings 🗸 🗸		
QR Codes		

FILL-RITE Fuel Management	Demo Company Demo User My Alerts V Customer Alerts V	Sort & Filter Cancel
Overview	Daily Report 🗹	Sort
Customer Assets	Date Range All time • O Previewing a limited number of records.	Sort By Order Date Ascending
My Assets 🗸 🗸	Show totals	Filter Expand all Collapse all
Reporting ^	If Transaction ID If Status 0 If Group ID 0 If Activity 0	Customer 🗸
Summaries	955ffc6d-7bf6-48e0- 91b0-b21393cd1069 Pump	Transaction 🗸
Tax Forms		Driver & Vehicle 🌒 🔨
Billing		Driver Name
Settings		Vehicle Name
OB Codes		Tank & Inventory 🗸 🗸
QR CODES		Site 🗸
Powered by		Clear filters Apply

- 4. Customize the report how you would like
 - Rearrange the columns by selecting the dots to the left of each column and dragging to the desired location.

FILL-RITE Fuel Management	Demo Company Demo User	My Alerts V Customer Alerts V	(२ Contact Help २ -
Overview	Daily Report	C	Exit & discard	Save
Customer Assets	Date Range			Exclude ③
My Assets 🗸 🗸	All time	O Previewing a limited number of records.		None 🗸
Reporting ^	Show totals	Disable headers	ne 💿 Sort & Filter	Add/Remove data
My Reports	Transaction ID	3 II Time 🔕 III Status 🗘 🔕	Group ID 🗘 🔕 🔛 Activity	🗘 🙆 🗄 Date 🗘 🮯
Summaries	955ffc6d-7bf6-48e0- 91b0-b21393cd1069	09:28:23 AM	Pump	2025-01-07
Tax Forms		/		
Accounting				
Billing				
Settings 🗸				
QR Codes				

 You can select Show totals to include Volume and Cost subtotals for each set of similar values in your Sort column. For example, if you check the Show totals checkbox and sort your report by Driver Name, your report will have a subtotal of the volume and cost of transactions created by each driver. You can use the Show totals feature with almost any attribute of a transaction, including but not limited to: Driver Name, Vehicle Name, Product Type, and even Custom Data Fields!

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- 5. When you are done, click **Save**.
 - Here you can change your export format. The default is XLSX format. You can also export your report in .CSV, .XLS, .XML, and .TXT formats.
 - For more information on recurring reporting see Recurring Reports

FILL-RITE Fuel Management	Demo Company Demo User	My Alerts 👻 Customer Alerts 👻	C	Contact Help A -
Overview	Daily Report	Ľ	Exit & discard	Save
Customer Assets	Date Range			Exclude ③
My Assets 🗸 🗸	All time	Save report	Cancel	None
	Show tote	 Learn more about creating reports > 		Add/Remove data
Reporting ^	Transaction ID	Report Name	File Type	◎ # Date ⁺ ◎
My Reports		Daily Report	XLSX 🗸	
Summaries	2025-01-07	Advanced file settings 🗸		
Tax Forms	91b0-b21393cd1(Date Range		2025-01-07
Accounting	2025-01-07 Totals:	Options marked 😁 can be scheduled as a recurring report.		
Billing		Yesterday Schedule recurring report	0	
Settings 🗸		Download	Save	
QR Codes				

Create a prebuilt report

1. Choose one of the 4 available prebuilt reports: Vehicle Fuel Usage,

Driver Fuel Usage, Fuel Pumped per Tank, or Custom Field Fuel Usage.

FILL-RITE Fuel Management	Demo Company Demo User My Alerts	✓ Custo	omer Alerts 🗸		Q Contac	t Help 🔎	۲ ۲
Overview	My Reports						
Customer Assets	Prebuilt Reports						
My Assets 🗸 🗸	G Vehicle Fuel Usage	R	Driver Fuel Usage	- Fue	el Pumped per Tank	Custor	
Reporting ^	Shows the amount of fuel pumped per vehicle. Sorted by Vehicle Nam and includes totals for each vehicl	Shows the amount of fuel pumped per driver. Sorted by Driver Name and includes totals for each driver.		Shows the amount of fuel pumped per tank. Sorted by Tank Name and includes totals for each tank.		Shows the ai per custom 1 Sorted by the	`
My Reports						includes totc	
Tax Forms	Q Search_				Cr	eate custom repo	rt
Accounting	Report Name 🖕	File Type	Recurring? 🔷 0/20 used	7	Created 🗘	sharing 🗘 🥇	公野
Billing	All Transactions	xisx	No		09/02/2018 07:38 PM	Not Shared	o ~
Settings 🗸							
QR Codes							

- 2. Fill in the **Report Name** and select the **Date Range** (Note: for more information on recurring reporting see Recurring Reports)
 - Any transactions that were created within your selected Date Range will be included in your report. Quick date range options include All time, Today, Yesterday, Last 7 days, Last Week, Last 14 days, Last month, Last quarter, and Last 12 months. If you want more control over Date Range, use the Custom option to select any two dates you prefer.

FILL-RITE Fuel Management	Demo Company Demo User	My Alerts 🐱	Customer Alerts 🗸		Q Conta	ct Help	٨ •
Overview	My Reports						
Customer Assets	Vehicle	Fuel Usage			Cancel		
		(i) Lear	n more about creating reports >				
Reporting	Report Nar	ne		File Type		ped per Tank	ed
My Reports	Advanced fi	le settings 🗸		ALSA		for each tank.	
Summaries	Date Rang	e					
Tax Forms	Options ma	ked 😇 can be schedu	led as a recurring report.			Creat	e custom
Accounting	Rep	h 🗸	Schedule recurring report	0		ed 🗘	公哈
Billing	8 Downloc	d View/Edit re	port	Sa	ive	/2018 07:38 PM	0×
Settings 🗸							

- 3. Select **Save** and you are done!
 - If you would like to make more edits and customize your report you can select View/edit report to get taken to the edit page where you can select additional filters and make advanced changes.

Advanced Report Options

Edit Column Title

When you create a report, each column will be named using a default name from FuelCloud. If you want a column to have a different label you can select the gear icon on the column. For example, if you want the *Driver Name* column to be labeled *Employee* instead, you can update the Column Title.

Data Format

Certain types of data have a variety of built-in ways they can be displayed. For example, if you want *time* to show as a 24 hour clock, or a 12 hour clock with AM/PM, you can do that by picking the Format. Different types of data will allow different custom data Formats:

Date: Choose how dates appear when exported. Day/Month/Year, Year-Month-Day, etc.

Time: Choose between 24-hour (16:32:55) and 12-hour (4:32:55 PM) times. **Volume, Price Per Unit, Cost, Inventory (After):** Choose how many numbers appear to the right of a decimal place, and whether or not the number includes commas. Using the number 11,222.3456 as an example, different options include:

- 11,222.3456
- 11222.346
- 11222.35

Max Characters

If you want to limit the length of a certain field, use Max Characters. If the field's value is longer than the **Max Characters** setting, the value will be shortened by cutting off the end. The original transaction will not be affected, only the data in the report will be shortened.

Exclude Zero-Volume, Bypass Transactions, or IDs from Sorting

- Zero-Volume: Some transactions may have 0 volume due to electrical noise or testing. These can be excluded from your report. The original transaction will not be affected.
- Bypass Transactions: Transactions that happened in Bypass mode can be excluded from your report if desired. The original transaction will not be affected.
- IDs from Sorting: When Show totals is selected, totals are calculated by IDs instead of the name. If you select exclude IDs from Sorting then same named items will get sorted and totaled together. For example if you have two driver accounts named John Doe, if you exclude IDs from Sorting then the transactions from both John Doe drivers will get totaled together instead of having a separate total for each John Doe driver.

Advanced file settings

- **Static File Name**: By default when downloading reports, the export date is included in the file name. Selecting Static File Name will remove the date and ensure the same name each time you download.
- ANSI encoding: Older systems may not support modern encoding standards such as Unicode. You can download your report with ANSI encoding to ensure compatibility with older systems.

Recurring reports

The 'Schedule recurring report' setting lets you receive data from a report by email or SFTP automatically on a regular schedule. You can receive your Recurring Reports on a Daily, Weekly, Biweekly, Monthly, or Quarterly basis.

The starting date and delivery time can be customized to allow you to choose when your week, month, or quarter should start. Times are based on the time zone set in your Account Settings. Select the frequency using the **Date Range** drop down then select the **Schedule recurring report** check box to open the First Report date selection and Delivery Time options.



Choose when you want to start receiving your report with **First Report** and **Delivery Time**.

FILL-RITE Fuel Management	Demo Company Demo User	My Alerts V Customer Alerts V		Q Conto	act Help 옷 ~
Overview	Untitled R	Save report	Cancel		Save
Customer Assets	Date Range	() Learn more about creating reports	>	Exclude	0
	All time	Advanced file settings 🐱		None	· · · ·
My Assets 🗸 🚽	Show totals	Date Range Options marked (20) can be scheduled as a recurring report.) (A	dd/Remove data
Reporting ^ -	Transaction ID	Last month	rt 🕐	@	Time 🔘
My Reports Summaries	955ffc6d-7bf6-48e 91b0-b21393cd1065	First Report ⑦ Delivery Time ⑦ 01/08/2025 10:00 AM •	Next Scheduled Dates Wed, Jan 8, 2025		09:28:23 AM
Tax Forms			Sat, Feb 8, 2025		
Accounting		Summary (?) Delivered monthly around 10:00 AM starting Wed, Jan 8,	Sat, Mar 8, 2025		
Billing		2025.	Tue, Apr 8, 2025		
Junig		Delivery Method			
Settings 🗸		C Email SFTP > 3			
QR Codes		Download	Save		

Choose your preferred **Delivery Method**. For Email, enter the **Email Recipients** in the entry box. Click **Save** when finished.

FILL-RITE Fuel Management	Demo Company Demo User	My Alerts 👻 Customer	Alerts V		Q Contact Help & -
Overview	Untitled R	Save report	_	Cancel	a Save
Customer Assets	Date Range	Learn more about creating reports >			Exclude ⑦
My Assets 🗸	All time	First Report 🕐	Delivery Time 💮	Next Scheduled Dates	None
,	Show totals	01/08/2025	10:00 AM 🗸	Wed, Jan 8, 2025	Add/Remove data
Reporting				Sat, Feb 8, 2025	
line per ung	Transaction ID	Summary 🕐		Sat, Mar 8, 2025	🔘 🗄 Time 🔘
My Reports		2025.	00 AM starting Wed, Jan 8,	Tue, Apr 8, 2025	
Summaries	955ffc6d-7bf6-486 9160-b21393cd1069	Delivery Method			09:28:23 AM
Tax Forms		Email SFTP > 🧿			
Accounting		Email Recipients			
Billing		Please add all email recipients below by separating each email with a comma.			
Settings 🗸					
QR Codes		Download		Save	

SFTP

Recurring Reports can be uploaded to an SFTP account on your server. The first step is to work with your IT team to be sure your SFTP account is set up and configured correctly. Once that's done, you can add your SFTP credentials in the Report section in FuelCloud:

Server

The IP address of the server where your SFTP account is located. This is generally in the format 123.123.123.123

Username

The username for the SFTP account on your server.

Password

The password for the SFTP account on your server.

Port

The default port for SFTP is 22. If this isn't working for you, check with your IT team to see if they've changed this from the default.

Autosend to SFTP

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domain.com	2 Best practice
Username	Please create a username and password for the specific folder you want the data to populate in.
Enter username	
Password	
Enter password	
Port	
22	