Customizing a Report

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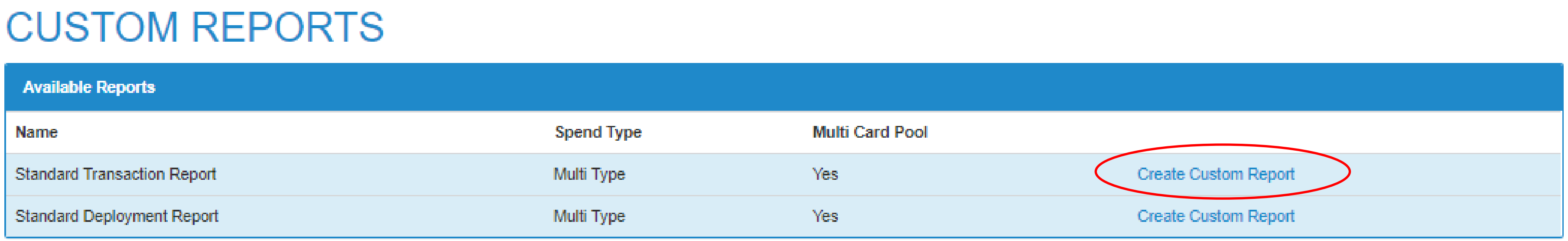
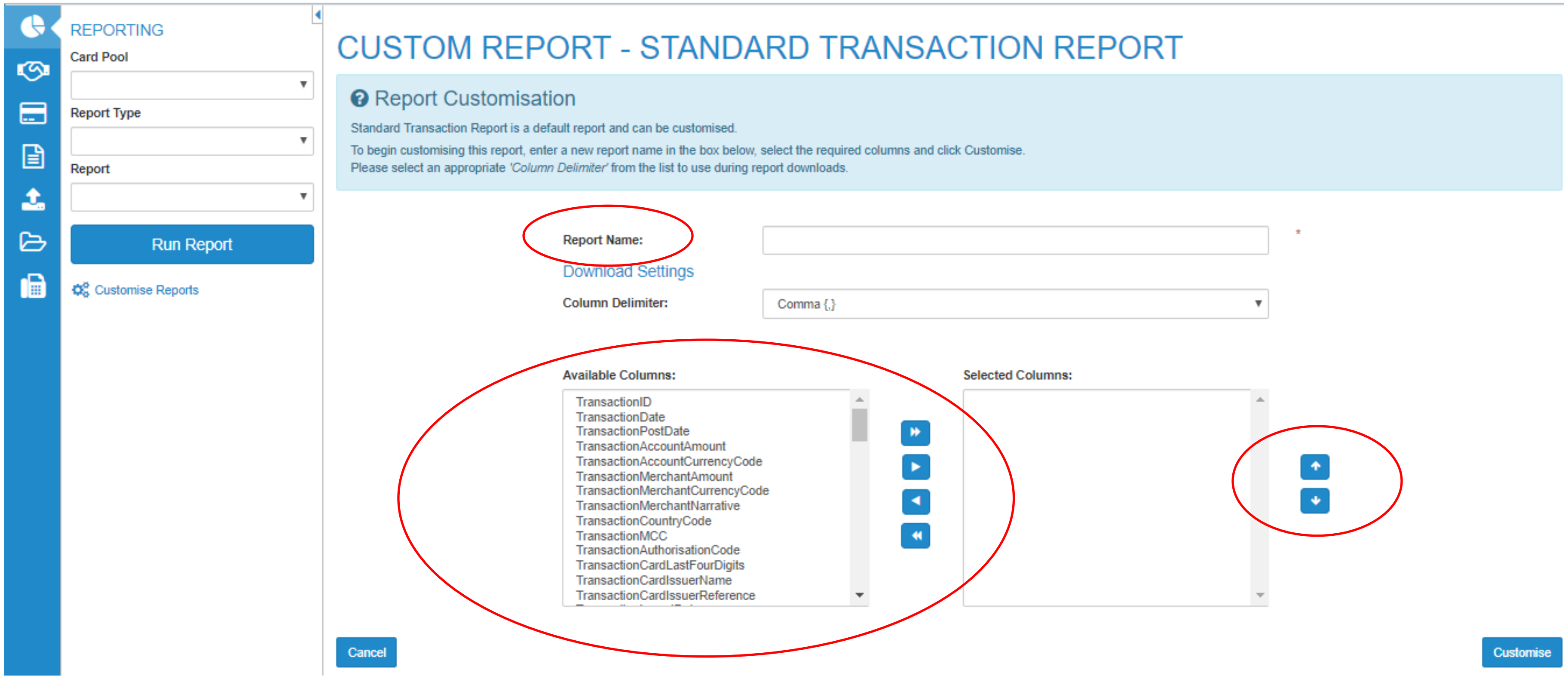
- Go to the “pie chart” icon (Reporting)
- Under the “run report” bar, click on the link “Customise Reports”
- For the “standard transaction report,” click on “Create Custom Report”
- Name the report
- Click on the columns you want and then click on the right arrow to add
- Put the columns in the order you want by moving the up and down arrows
- Click on “Customize”





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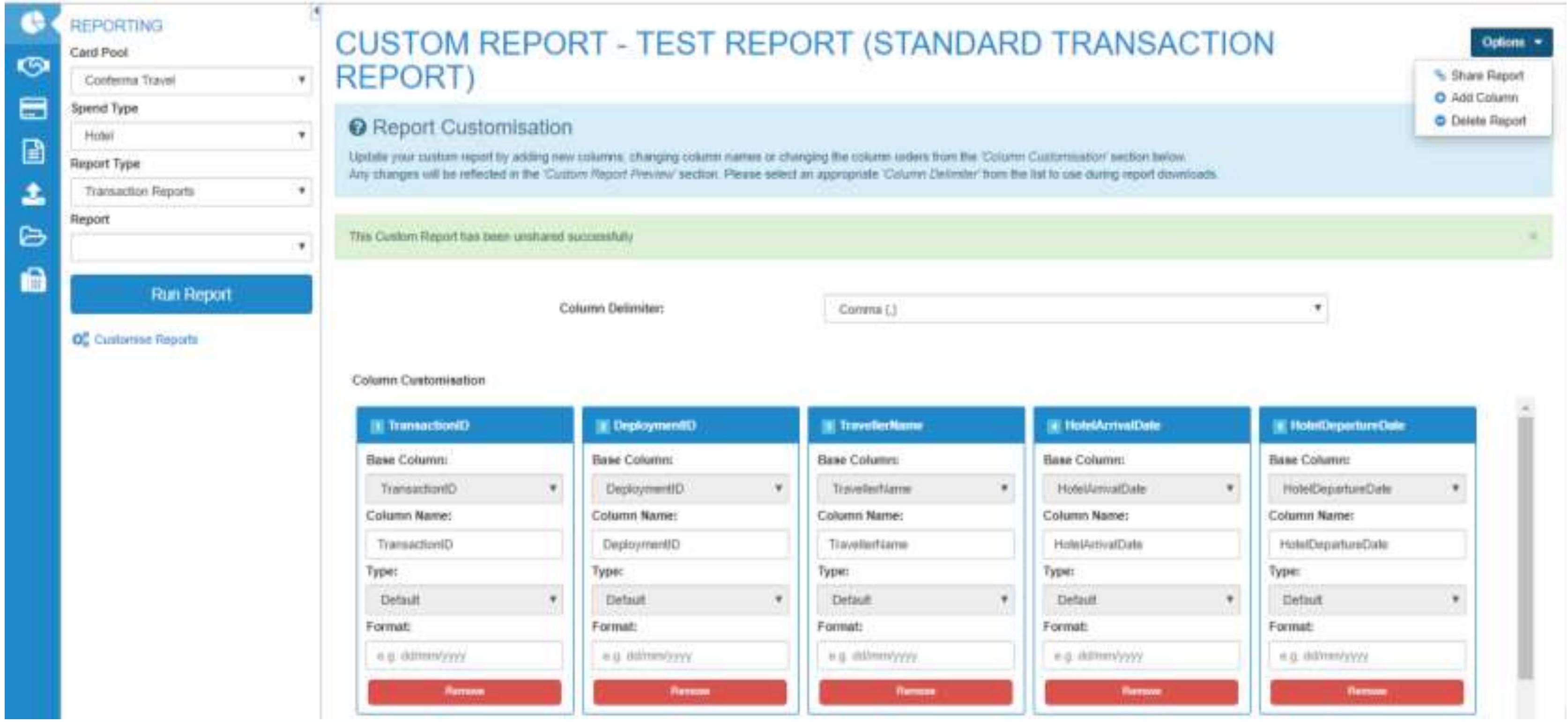
- You will then see all of the columns and will have the ability to amend
- You can also reorder the columns by clicking on it and dragging to where you want it



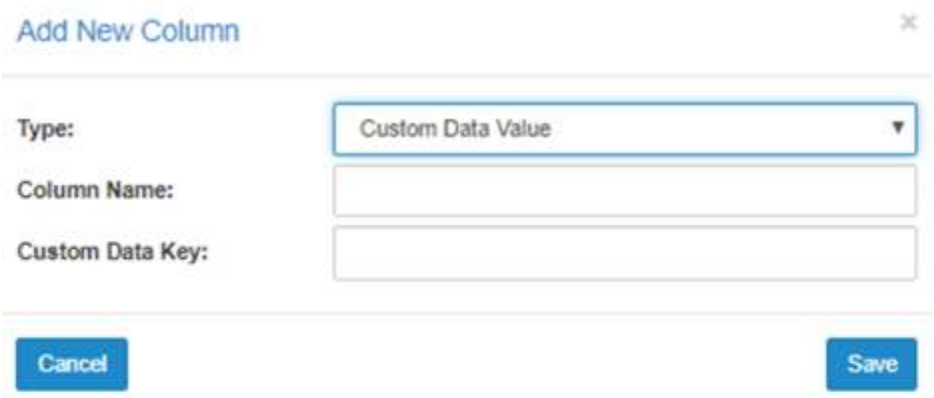
- A preview of the report is also provided at the bottom of this page

Custom Report Preview

Test Report

Transaction ID	Deployment ID	Traveller Name	Hotel Arrival Date	Hotel Departure Date	Deployment PNR Locator
0	0	065aba2d	17/05/2019	17/05/2019	f1502f7e
1	1	e7948a4f	18/05/2019	18/05/2019	ff617df4
2	2	e3b64ab6	19/05/2019	19/05/2019	d8b6898a
3	3	dee2ed62	20/05/2019	20/05/2019	c056a7e0
4	4	c4d7cf48	21/05/2019	21/05/2019	671bc0d1

Customizing a Report – Adding Custom Data Fields



- In order to include custom data fields on the custom report, you MUST add each column to the report
- Under “Options” on the top right corner, click on “add column”
- For “type” – select “custom data value”
- For “column name” – enter the name of the custom field that you want to appear on the report as the column name
- For the “custom data key” – this is the name of the field as configured by your TMC. What you enter into this field must match exactly to what the TMC entered. For example, if you have a custom data field label as ‘COST CENTRE’ then the custom data key should also be named ‘COST CENTRE (same spelling, spacing and capitalization).
- Add the information and click “save”
- Repeat process for all custom fields.

Customizing a Report

- If you want to share the report with other people, then select “share report” under the “Options” tab
- The custom report will then be available to any SNAP user at your company.
- To access the custom report:
  - ✓ Go to the “pie chart” icon (reporting)
  - ✓ Select your card account
  - ✓ Select “hotel” as the spend type
  - ✓ Select “transaction reports”
  - ✓ In the “Report” section, click on the drop down – your custom report will be the last report on the list
  - ✓ Select the statement date and run