verifone

Customize a report template

Overview

This feature enables you to customize the content by selecting the transaction details you need, and the access to the report within your organization. You can create new report templates for exporting the report to best suit your business needs.

Access

Your level of access determines if you can create and edit a new template.

Access:

- Merchant Admin

No access:

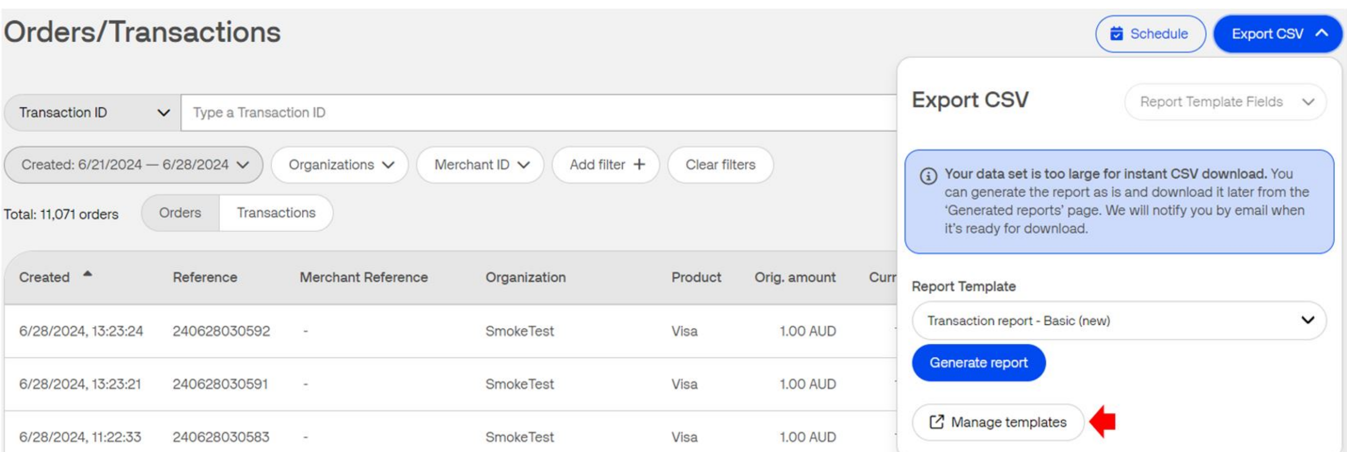
- Every other user roles

> All users, except those with Merchant External Partner, Reseller Manager (MOP) and Reseller Representative (MOP) roles, can download the customized CSV report.

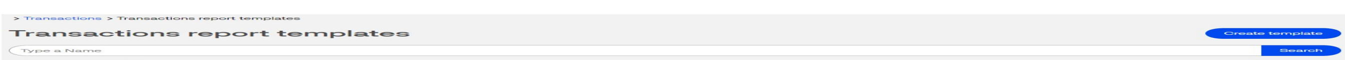
Creating a report template

To create a new report template, follow these steps:

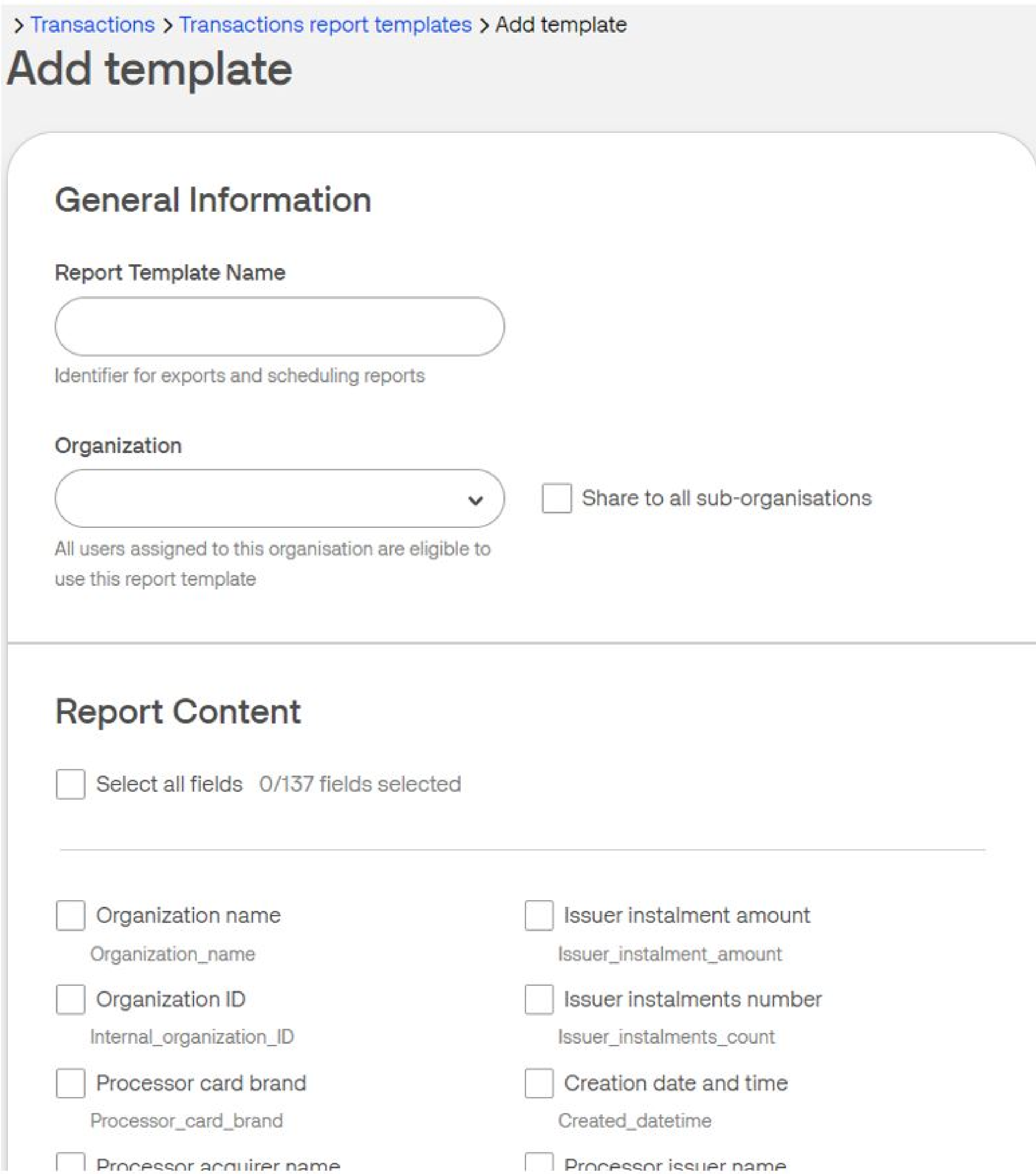
1. Navigate to *Commerce* and select **Orders / Transactions** from the *Reporting* section.
2. Select the needed view between orders and transactions, by clicking on the toggle button **Orders / Transactions**.
3. After adding the filters for the details that you need included in the report, click on **Export CSV**.
4. In the *Export CSV* pop-up dialogue box, click on **Manage templates**.



5. In the *Transactions report templates* page, click on the **Create template** button on the right-hand side of the screen.

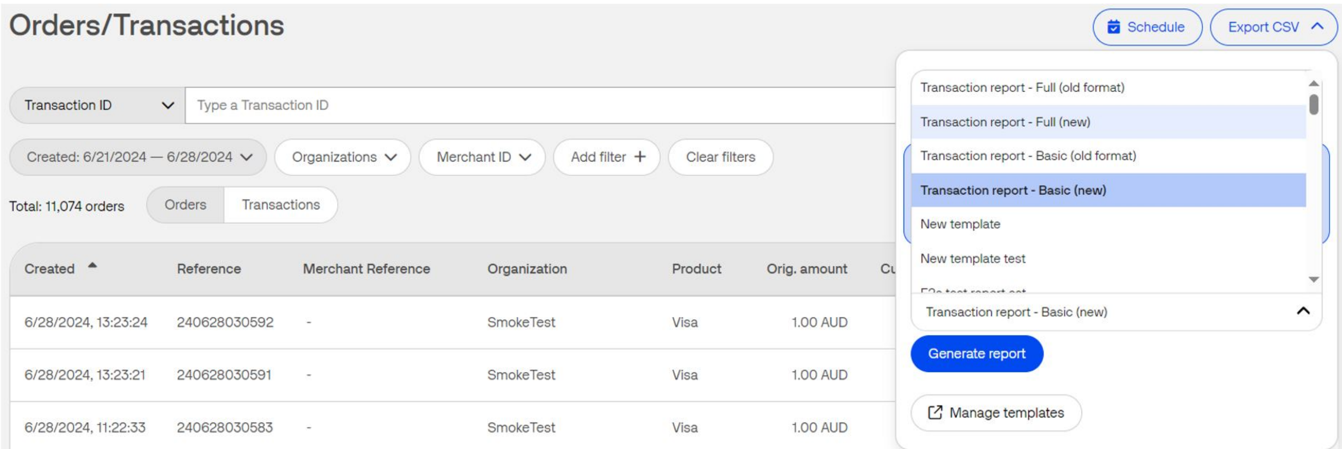


6. In the *Add template* form fill in and select all needed details.
    - In the **Report Template Name** field, type the name of the new report template.
    - In the **Organization** field select your organization from the drop-down menu. You can allow users from your organization and attached sub-organizations to use the template by clicking on the **Share to all sub-organizations** checkbox.
    - In the **Report Content** section you can either select all the available transaction fields by clicking on the **Select all fields** checkbox or you can select only the fields you need by clicking on their respective checkbox from the list of 100 different transaction fields. With every selected checkbox from the list the counter next to the *Select all fields* checkbox increases, informing of the number of details you have selected so far. For information on each field, see Reporting details.



7. Once you have chosen the details you need included in the report, click on **Save template**.

8. The new template will now be available to use from the **Report template** drop-down list in the *Export CSV* pop-up menu each time you need to export a report.



9. You can also edit existing templates if you have a **Merchant Admin** role in your organization.