

Report Scheduler

Overview

The *Report Scheduler* in Verifone Central enables you to set and generate an orders / transactions report at time intervals scheduled by you. You can set the time and frequency at which the report will be generated, you can apply filters to the orders / transactions included in the report and you can choose who has access to the reports.

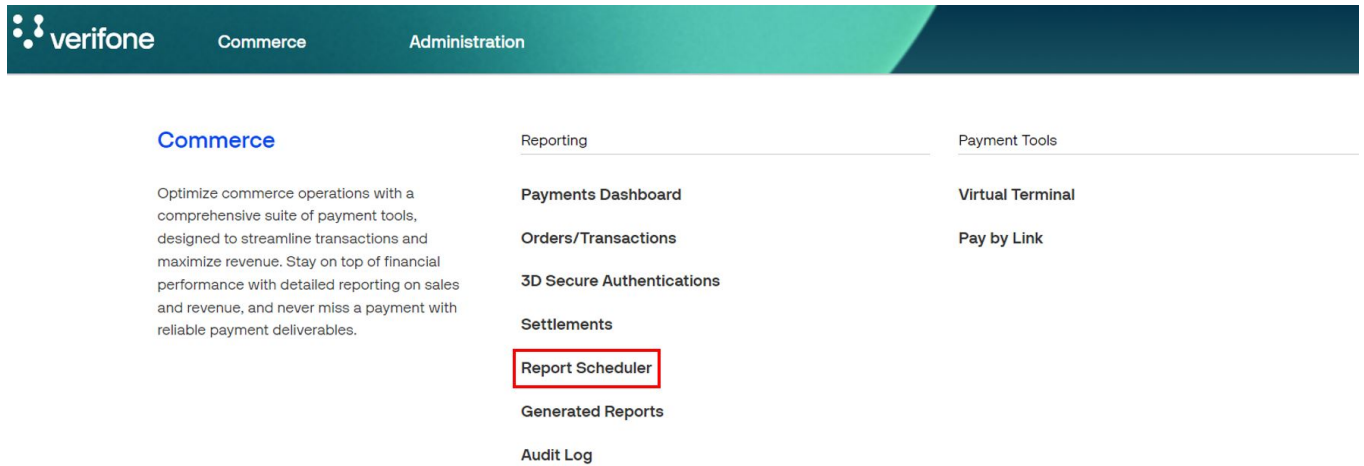
Availability

The *Report Scheduler* can be activated on demand and is set by the Merchant Admin or Merchant Supervisor roles. For more information, contact your Verifone sales representative.

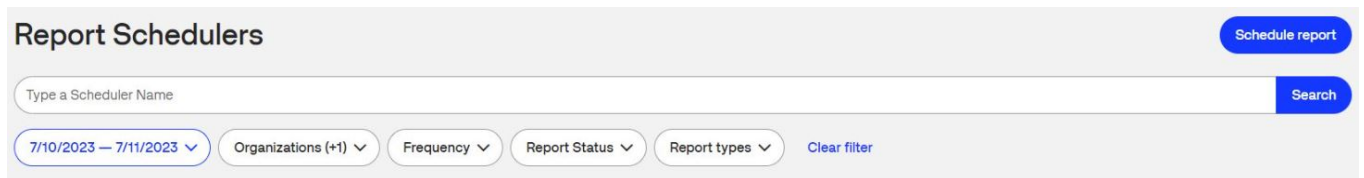
Generate a scheduled report

To schedule a report, follow these steps:

1. Log in to your [Verifone Central](#) account.
2. Navigate to **Commerce** -> *Reporting* and select **Report Scheduler**.



3. In the next window, click on the **Schedule report** button.



4. Alternatively, you can also select **Orders / Transactions** from **Commerce** -> *Reporting* and click on the **Schedule** button on the top right-hand side.
5. In the *Schedule Report* side panel on the right-hand side complete the following fields to customize the type of report you want to generate:

Scheduled report name: Type in the title of the report you want to start.

Report Content:

- **Report templates:** Choose from the drop-down list between two templates: **Transaction Reports-Full** and **Transaction Reports-Basic**.

The sequence of the columns in these Report templates may experience changes in the long term, so that any possible automations on the merchant side should rely on the column names only and not on the order/sequence of the columns.

- **Set up filters to manage report content:** You can choose to filter the content of the report according to:
 - Transaction date
 - Channel
 - Currency
 - Product
 - Transaction Type
 - Transaction status
 - Processor
 - Merchant ID
 - Organizations

Schedule Settings:

- **Frequency:** Choose how often the report is generated:
 - Daily
 - Weekly
 - Monthly
- **Offset Days:** Offset days is a delay or gap between the transaction date (T) and the date in which the report is generated. It specifies how many days after the transaction date the report will be generated. Offset days values that can be selected are between 2 up to 7 days.
 - It is only applicable to daily frequency scheduled reports.
 - An offset of 2 days (T+2) means the report will be generated with a 2-day gap in the transaction export.
 - Let's assume your transactions are getting settled 2 days after the transaction date. For example, you scheduled a report today on April 23, 2024, selecting an offset of "2" days. Starting from tomorrow (April 24, 2024), you will begin receiving the daily report with a 2-day offset. This means you will receive the latest status report export of transactions dated April 22, 2024, tomorrow.
- **Transaction time:** Set the time when the collection of transactions for the current report will end. New transactions after this time will not be included in the current report. The transaction time is the end of the range of the current report and the start of the next report.
- **Report time:** Set the time when the report will be generated.
- **Report time zone:** Set the regional time zone used to schedule the report.

Permissions and notifications:

- **Organizations:** Search for an organization, so you can enable its members to access the report.
- **Recipient e-mail address:** Add the e-mail addresses of those that will be notified that a report has been generated.

- **Deliver reports to SFTP site (Only available if SFTP is enabled):** Click on the checkbox if you want reports to be sent using the Secure File Transfer Protocol (SFTP). SFTP is a safe encrypted way of transferring files between two remote systems. **This checkbox is only visible if the organization has the SFTP Delivery feature access enabled.**
- **Upload to SFTP (Only available if SFTP is enabled):** Identifier for the SFTP site where the reports will be sent to.
- **Folder (Only available if SFTP is enabled):** Folder on the SFTP site where the reports will be sent to.

The SFTP Delivery feature **is available on a contract basis**. If you are interested in using this feature, contact our sales representatives.

The SFTP Delivery feature **is activated only if it is enabled in the user's organization as well as in the organization you want to set up a scheduled report for.**

Organization

221107 Test 2

Deliver reports to SFTP site

Upload to SFTP Folder name

Select SFTP location

The full transactions report will be generated in CSV format starting from .

6. Once you set all the details of your report scheduler, click on **Schedule report** to set the scheduler.

The screenshot shows the 'Report Schedulers' page with a table of existing schedulers and a 'Schedule report' modal. The modal includes fields for report name, subject, content, schedule, filters, settings, and permissions.

Scheduler name	Scheduled on	Organization	Frequency	Status
Schedule Test 2	17/05/2024, 04:07 PM	Parent	Daily	Enabled
Schedule Test 1	17/05/2024, 04:02 PM	Parent	Daily	Enabled
CSF 03 RS Test	17/05/2024, 03:49 PM	Parent	Daily	Enabled
CSF RS 03 Test	17/05/2024, 03:32 PM	Parent	Daily	Enabled
test PC	17/05/2024, 03:45 PM	Parent	Daily	Enabled
Example test RS CSF	17/05/2024, 06:52 PM	Parent	Daily	Enabled
Simplified Test	17/05/2024, 04:45 PM	Parent	Daily	Enabled
QMS Custom	16/05/2024, 10:04 PM	Parent	Daily	Enabled
RS Test	17/05/2024, 05:19 PM	Parent	Daily	Enabled
RS Demo CSF 02	17/05/2024, 05:17 PM	Parent	Daily	Enabled

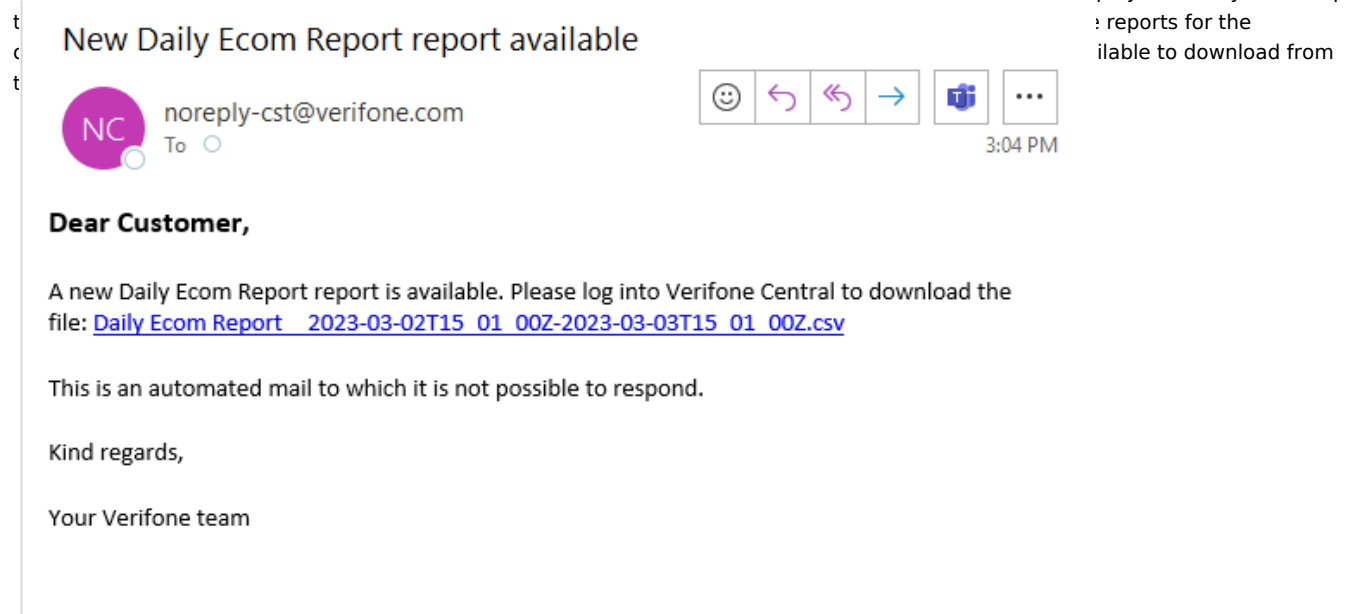
Schedule report modal details:

- Scheduled report name: [Text input]
- Email subject: [Text input]
- Report content: [Text input]
- Report schedule: [Dropdown menu]
- Get up filters to manage report content: [Text input]
- Schedule settings:
 - Frequency: Daily
 - Offset days (Optional): [Dropdown menu]
 - Transaction time: [Time picker]
 - Report time: [Time picker]
 - Report time zone: [Dropdown menu]
- Permissions and notifications:
 - Organization: [Dropdown menu]
 - Deliver reports to SFTP site: [Checkbox]
 - Recipient's email addresses (Optional): [Text input]

Unlike the transactions visible in the *Transactions* page, the **Scheduled Reports** will contain every single transaction that matches the configured filters. **For example**, the Void, Capture, etc., transactions are added as separate transactions in the report. These follow-on transactions are not displayed in the *Transaction Reports* page as a separate line. The relevant information such as Transaction Type, Status or Current amount is reflected only as updated fields in the initial transactions. However, in the Scheduled reports, the Void, Capture, etc., transactions are added as separate lines besides their initial transaction.

If the report contains 500,000 transactions or more, it will not be scheduled. An e-mail will be sent automatically to inform you that the report cannot be scheduled due to the limit breach. If you are using the SFTP feature, the limit is higher, allowing you to include up to 4000000 transactions in the scheduled report.

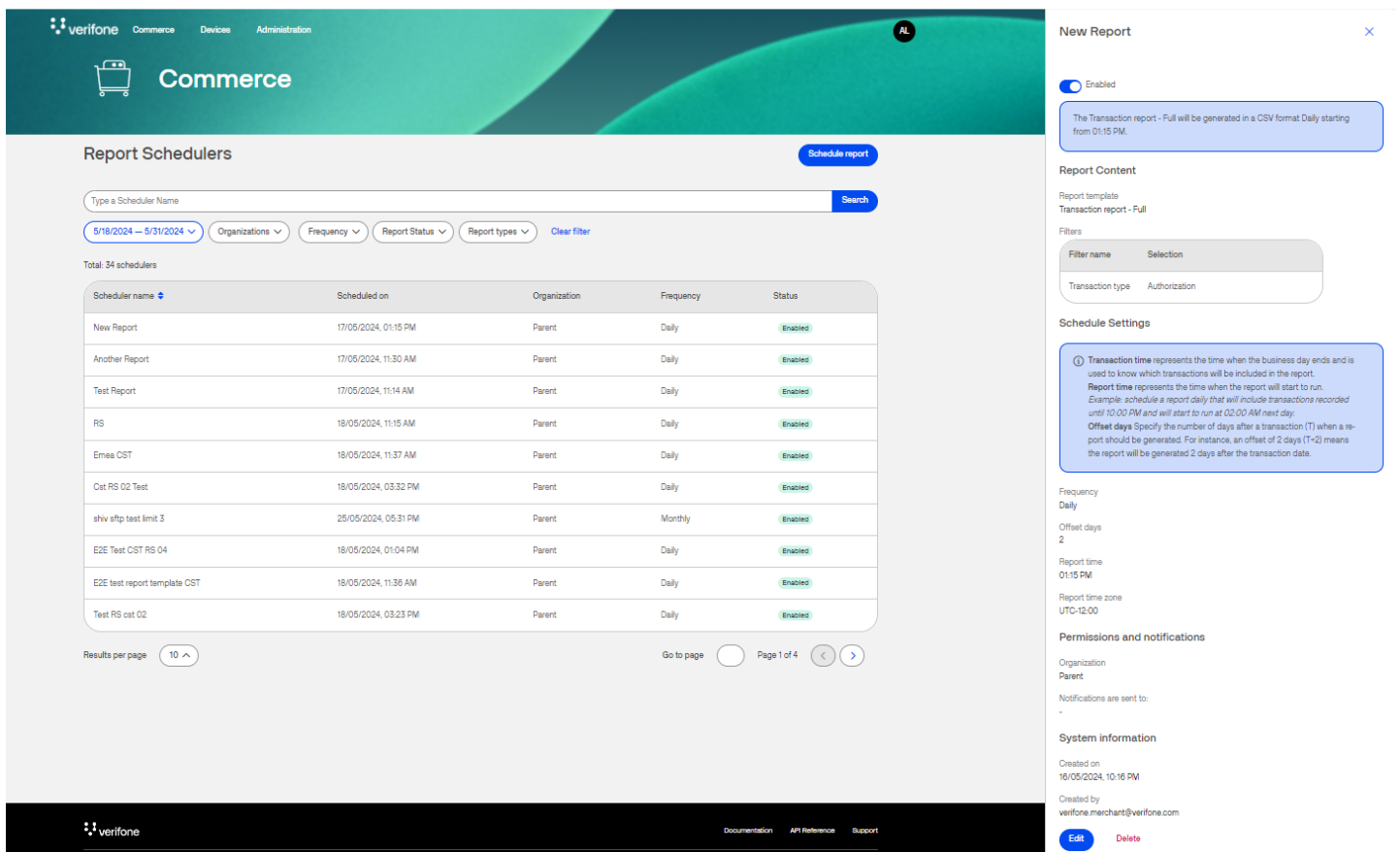
- When the report is generated, an e-mail is sent out to all the configured e-mail addresses. The e-mail contains a direct link to the report on Verifone Central. If you do not have permission to access that report, an error message will be displayed when you attempt



View a scheduled report

- Log in to your Verifone Central account.
- Navigate to **Commerce** -> *Reporting* and select **Report Scheduler**.
- In the new window you can see all the report schedulers generated for your organization. You can filter according to:

- **Date range** - to filter the results by the scheduling times, the first date being the start of the scheduling period and the second the end of the scheduling period.
 - **Organizations** - the organizations that made the transactions aggregated in the report.
 - **Frequency** - how often the report is generated.
 - **Report status** - whether the report scheduler is currently Disabled or Enabled.
 - **Report types** - the report template used to generate the report.
4. To get more details on a report scheduler, after applying a filter, click on the scheduler you are interested in, and a side panel will appear on the left-hand side.
 5. At the bottom right-hand side of the side panel there is an **Edit** button. You can change all the sections except for the filters to manage report content. To change the filters, you must set up a new report scheduler.
 6. If you want to delete a report scheduler, click on the **Delete** button next to the **Edit** button.
 7. If you want to temporarily interrupt the scheduler, you can click on the slide button on top and set the scheduler from **Enabled** to **Disabled**. This way, you can enabled it again when it is convenient for you.



Report Schedulers

Type a Scheduler Name

6/18/2024 – 5/31/2024

Total: 34 schedulers

Scheduler name	Scheduled on	Organization	Frequency	Status
New Report	17/05/2024, 01:15 PM	Parent	Daily	Enabled
Another Report	17/05/2024, 11:30 AM	Parent	Daily	Enabled
Test Report	17/05/2024, 11:14 AM	Parent	Daily	Enabled
RS	18/05/2024, 11:15 AM	Parent	Daily	Enabled
Emea CST	18/05/2024, 11:37 AM	Parent	Daily	Enabled
Cat RS 02 Test	18/05/2024, 03:32 PM	Parent	Daily	Enabled
shiv sftp test limit 3	25/05/2024, 05:31 PM	Parent	Monthly	Enabled
E2E Test CST RS 04	18/05/2024, 01:04 PM	Parent	Daily	Enabled
E2E test report template CST	18/05/2024, 11:36 AM	Parent	Daily	Enabled
Test RS cst 02	18/05/2024, 03:23 PM	Parent	Daily	Enabled

Results per page

New Report

Enabled

The Transaction report - Full will be generated in a CSV format Daily starting from 01:15 PM.

Report Content

Report template
Transaction report - Full

Filters

Filter name	Selection
Transaction type	Authorization

Schedule Settings

Transaction time represents the time when the business day ends and is used to know which transactions will be included in the report.
Report time represents the time when the report will start to run.
 Example: schedule a report daily that will include transactions recorded until 10:00 PM and will start to run at 02:00 AM next day.
Offset days Specify the number of days after a transaction (T) when a report should be generated. For instance, an offset of 2 days (T+2) means the report will be generated 2 days after the transaction date.

Frequency
Daily

Offset days
2

Report time
01:15 PM

Report time zone
UTC-12:00

Permissions and notifications

Organization
Parent

Notifications are sent to
-

System information

Created on
18/05/2024, 10:16 PM

Created by
verifone.merchant@verifone.com