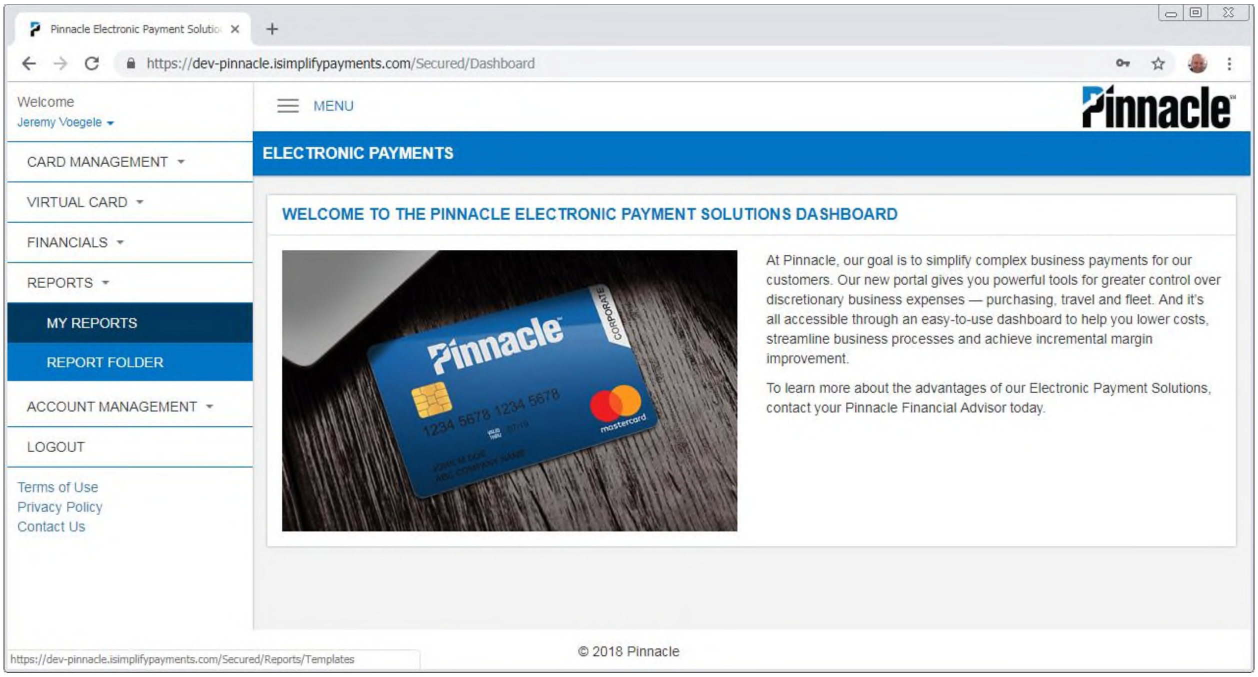
iSimplify Payments

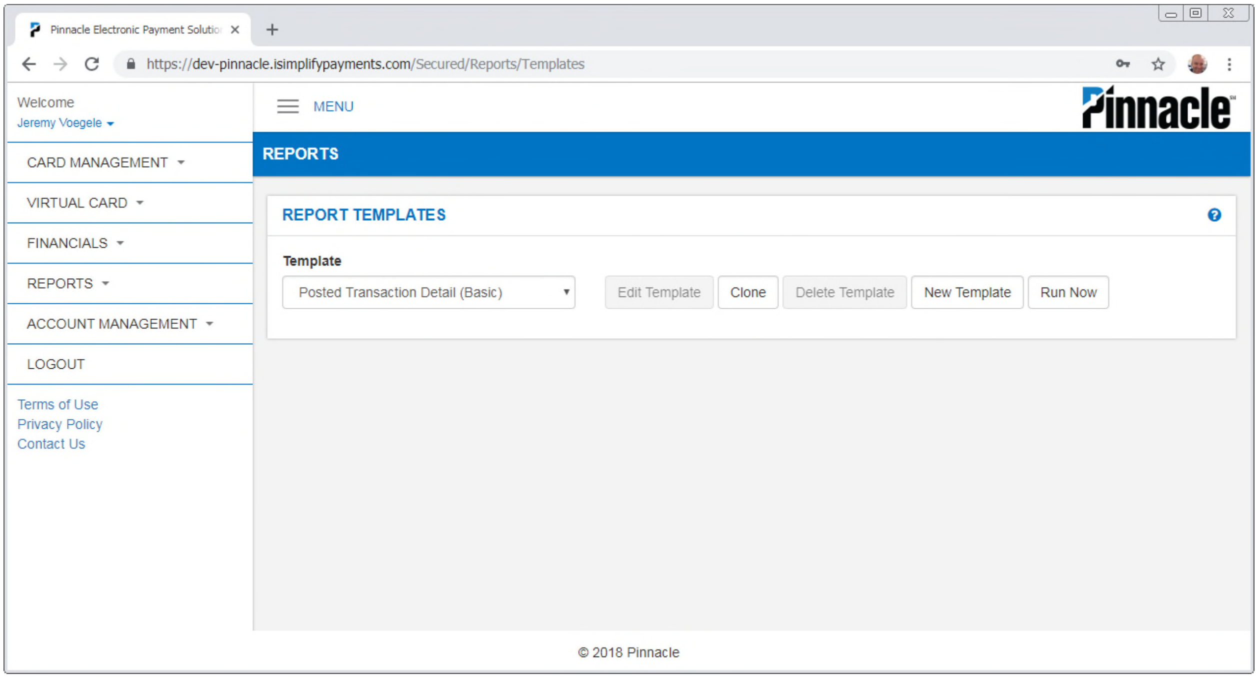
New Feature Documentation – My Reports

We're excited to share with you a new feature of iSimplify Payments – **My Reports**. My Reports brings customizable reporting capabilities in a simple, easy to use user interface.

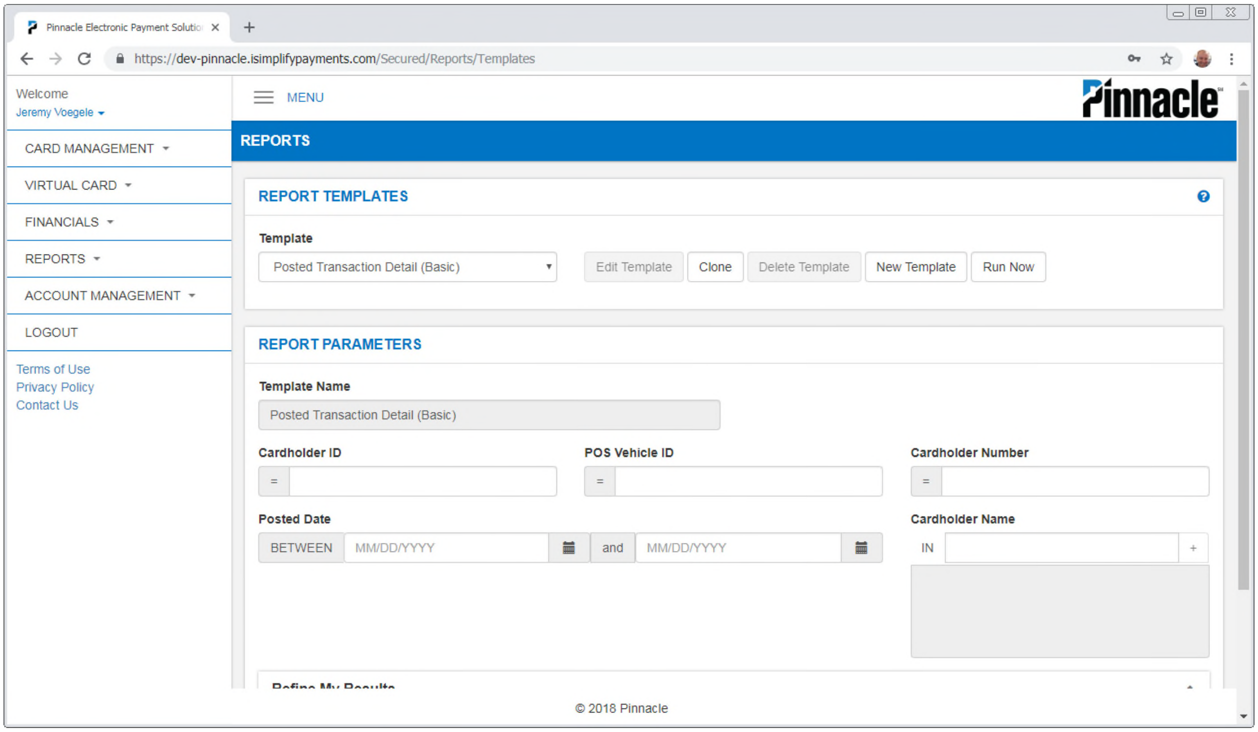
The new reporting feature can be found under **Reports > My Reports.**



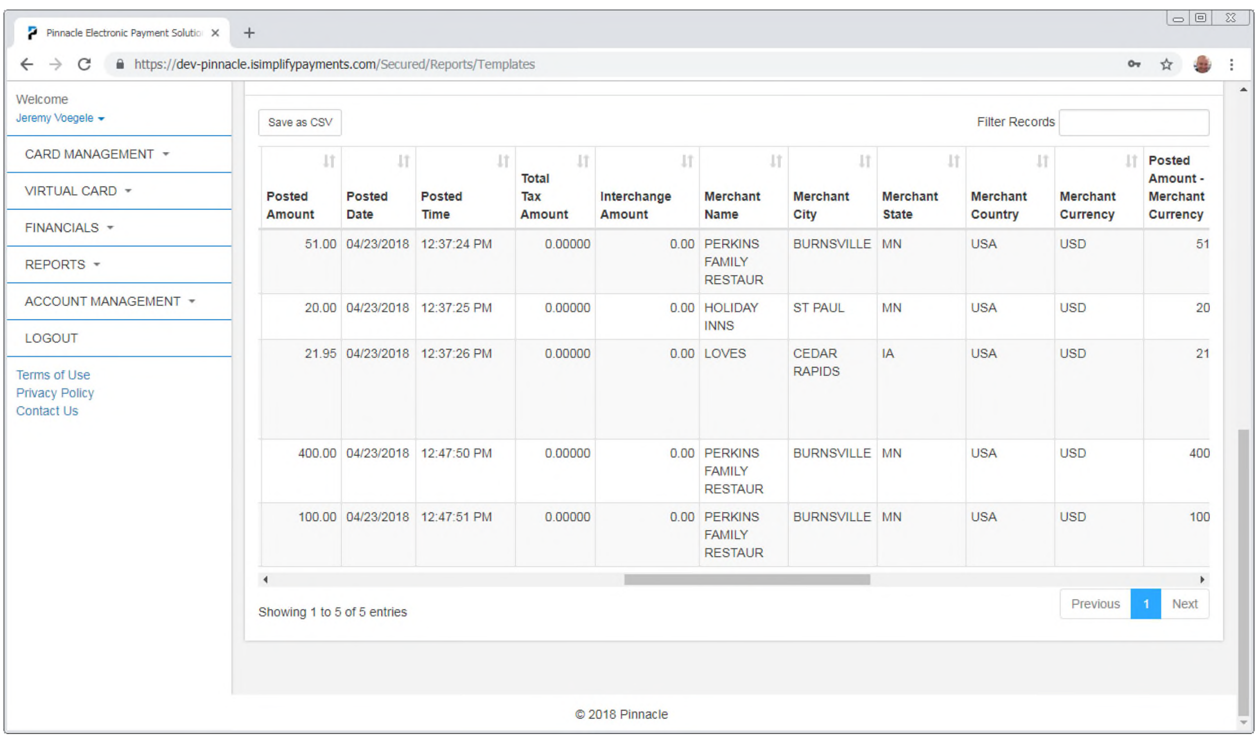
On the reporting page, you'll see a drop down with a collection of templates that we at WEX have initially configured for you. Once you've made a selection, you can prepare to run the report by clicking **Run Now**.



Parameters that are configured for the template are shown below the **Report Templates** panel. They're all optional, but if you wish to filter the reporting data you can do so before generating the report. Below, I've decided to choose the **Posted Transaction Detail (Basic)** template – this report will return all created Virtual Cards and their details. Further below, I've decided to filter for transactions that have a **Posted Date** between 03/01/2018 and 04/30/2018. You can now click **Run Now** to generate the report.

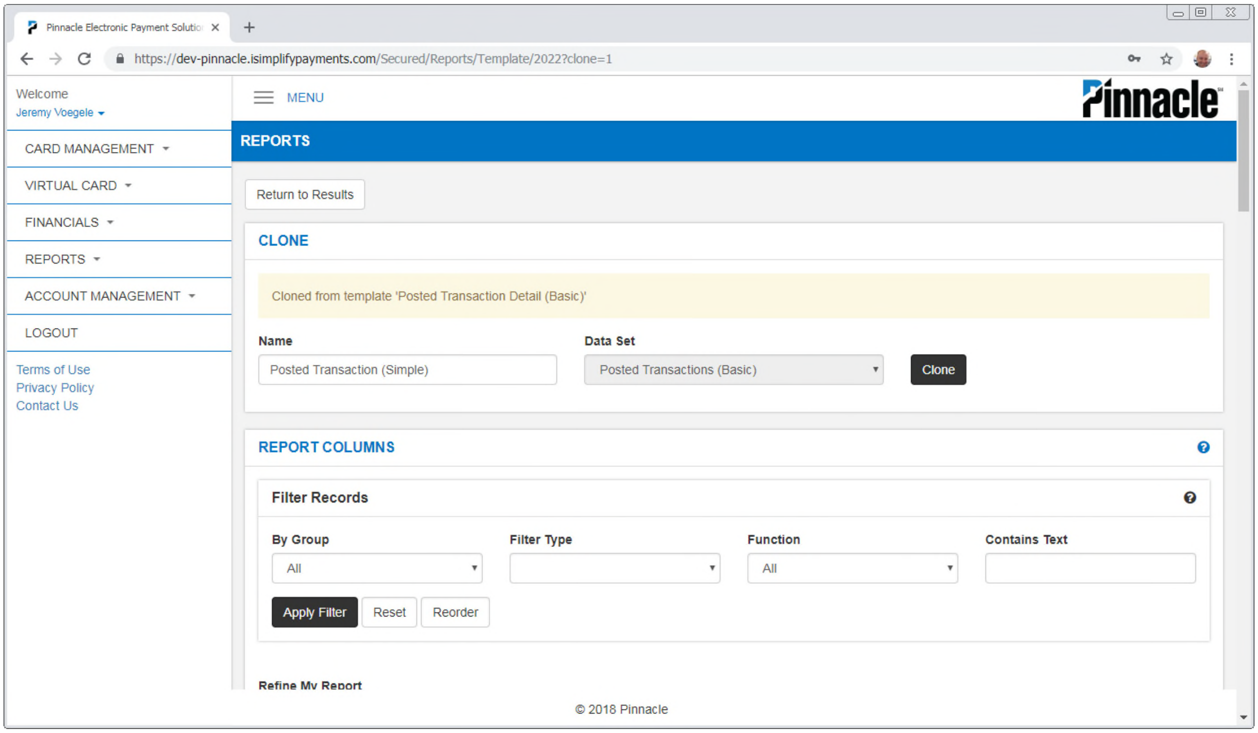


The results will appear below the **Report Parameters** panel, under **Report Results**. The report results are like any other table in iSimplify Payments, you can further filter the records, sort, and export the table as a CSV file (you can export the results to a file by clicking **Save as CSV**).



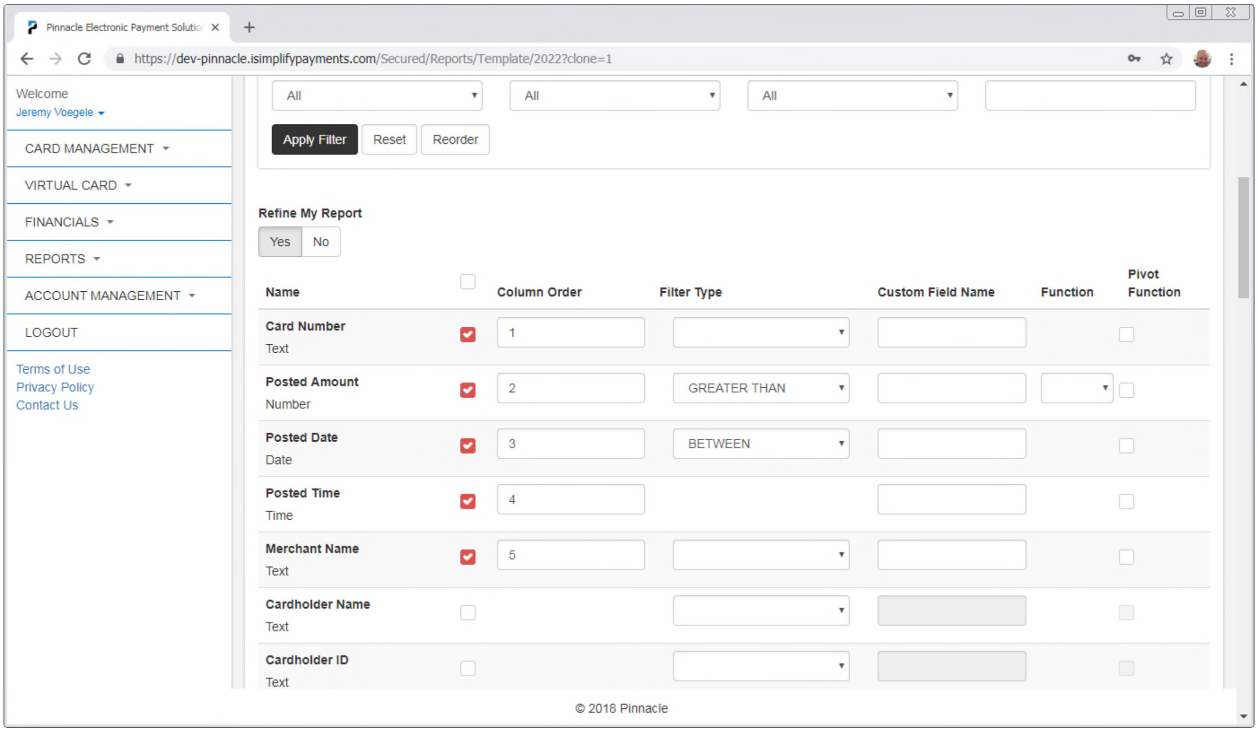
As you can see by the results, we return several columns for which we think would be most helpful, and in an order that groups like types of data together. One of the neat features of our new reporting tool is the ability to customize your reports – you can change the order and number of columns returned in your results, perform aggregate operations over columns like average and sum, add additional filters, rename columns, and pivot data.

You can see these more advanced features by either creating a new template or cloning an existing one. For the example below, I’ve cloned the **Posted Transactions (Basic)** report.

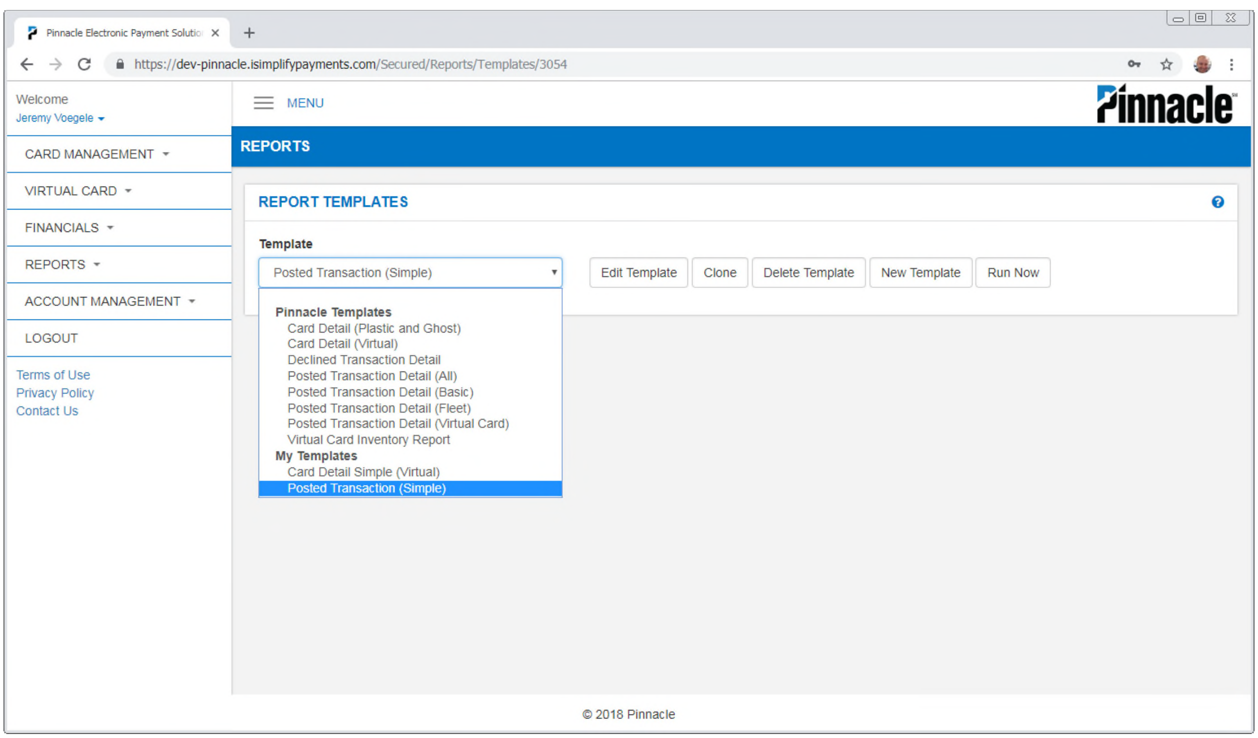


I’ve decided to name this new template “Posted Transactions (Simple)”. Scrolling further down, I select only the columns I wish to see in this report.

Since I've decided that I only require a few columns, I've unselected several that were copied from the template I cloned earlier. I've also given the **Card Number** field a custom name of "Card Last 4".



Scroll back to the top of the page and click the **Clone** button to save your changes. Now your newly created template will appear in the **Template** drop down under "**My Templates**".



You can now run your report from the reporting page. Running my custom report returns the columns and data I had configured earlier.