

CapLink

Reports Automation – Activating or Changing Address or
Schedule

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1. Document overview

This document provides instructions relating to activating the automated reports available in Caplink as well as changing the email address/schedule set for reports already setup.

2. Additional Reports

CapLink has a set of additional reports available to help you monitor and track the flow of transactions through your system and any errors that may occur. The CapLink Support team would usually automate the essential reports on your behalf during install or the induction phase. To access all reports available in Caplink, select  under

Reports <input checked="" type="radio"/> All <input type="radio"/> Batch Only <input type="radio"/> Ad-Hoc Only				
Name	Last Run Date	Auto Run	Batch	
▶ Detailed by billing Month		<input type="checkbox"/>	<input type="checkbox"/>	
Summary by billing Month		<input type="checkbox"/>	<input type="checkbox"/>	
Error Report by Month	05/Aug/2015 10:15:10	<input type="checkbox"/>	<input type="checkbox"/>	
Detailed by Date Range		<input type="checkbox"/>	<input type="checkbox"/>	
Summary Report by Member		<input type="checkbox"/>	<input type="checkbox"/>	
Summary Report by Member		<input type="checkbox"/>	<input type="checkbox"/>	
Error Report for Last Full Month	01/Aug/2015 05:04:39	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Detailed for Last Billing Month	04/May/2015 11:39:08	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Summary for Last Billing Month	05/Aug/2015 10:14:28	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Error Report for Current Month		<input type="checkbox"/>	<input checked="" type="checkbox"/>	

Reports <input checked="" type="radio"/> All <input type="radio"/> Batch Only <input type="radio"/> Ad-Hoc Only				
Name	Last Run Date	Auto Run	Batch	
▶ Detailed for Current Month	30/Jul/2015 09:49:26	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Summary Report for Current Month	04/Mar/2015 10:00:12	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Detailed for Last Full Week		<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Detailed for Week To Date		<input type="checkbox"/>	<input checked="" type="checkbox"/>	

The key reports you should configure and automate are:

- Error Report for Last Full Month
- Detailed for Last Billing Month
- Error Report for Current Month
- Detailed for Current Month

Error Report for Last Full Month

This report lists all transactions that have either “Failed” or got stuck in “Pending”, “Processing” states for the last billing month. All reports are generated to provide a snapshot at specific moment in time and “Pending”, “Processing” transactions may eventually end up in “Processed” mode post report generation. The report should be used as guide only.

Min. recommended schedule frequency → monthly, at the start of the month

Detailed for Last Billing Month

This report provides a detailed transaction listing for the last billing month.

Min. recommended schedule frequency → monthly, at the start of the month

Error Report for Current Month

This report lists all transactions that have either "Failed" or got stuck in "Pending", "Processing" states for this current billing month. All reports are generated to provide a snapshot at specific moment in time and "Pending", "Processing" transactions may eventually end up in "Processed" mode post report generation. The report should be used as guide only.

Min. recommended schedule frequency → weekly, on Monday or Friday.

Detailed for Current Month

This report provides a detailed transaction listing for the current month.

Min recommended schedule frequency → weekly, on Monday or Friday


3. Automating a report to email someone

To automate a report to automatically email someone on a set schedule, the following steps can be followed

- Select the report you wish to automate from "Additional Reports" (only the "Batch" related reports can be automated)
- Select the "Schedule" tab (if not already configured, tick "Auto Run" to activate) – *Reports that cannot be automated do not have a "Schedule" tab*

The screenshot shows the 'Add / Edit Reports' window with the 'Schedule' tab selected. A red arrow points from the 'Auto Run' checkbox in the 'Details' tab to the 'Auto Run' checkbox in the 'Schedule' tab. The 'Schedule' tab configuration includes:

- Auto Run
- Frequency: Weekly
- Days: Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday
- Start Time: 0:00
- File Output: PDF, Excel, Rich Text, Crystal Report, Word
- Email: Email
- Email Addresses: [Empty field with Add and Del buttons]
- Email Body: [Empty text area]

- Select the schedule frequency, file output format and the email address(es) to which you wish the reports sent to.
- When done, select 

4. Changing an existing email address

1. Log into CapLink
2. Select "Reports"



3. Select "Additional Reports"



4. From the list of reports given, select the ones that have a tick for "Auto run"

Auto Run	Batch
<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

5. Once selected that should bring up additional information at the bottom.
6. Select the "Schedule" tab (1)
You should see the invalid email listed (2)

Details **Schedule** 1

Auto Run

Schedule

Frequency: Weekly

Monday Tuesday
 Wednesday Thursday
 Friday
 Saturday Sunday

Start Time: 07:30

File Output

PDF
 Excel
 Rich Text
 Crystal Report
 Word

Email

Email Addresses

Add
 Del

oliver.rebello@capricorn.coop 2

Email Body:

Summary report month to date Repco
Name of Actual Report in Caplink

7. Select and click "Del" to remove
8. Add valid email address and click "Add"

9. Select "Save"

Repeat above process for any other reports that has a tick for Auto Run.

Please note that some reports may be listed on page 2 depending on your setup. To access page 2 (if available) Use