

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 several reports available to help monitor and track the flow of submitted transactions and any errors that may occur.

The CapLink Support team will usually automate four essential reports on your behalf during initial install, the induction phase or on request if you believe that your reports are not setup.

To access all reports available in Caplink, select  followed by 

Report Management  				
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		<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"/>	
Member Detailed Report		<input type="checkbox"/>	<input type="checkbox"/>	
Error Report for Last Full Month		<input checked="" type="checkbox"/> 1	<input checked="" type="checkbox"/>	
Detailed for Last Billing Month		<input checked="" type="checkbox"/> 2	<input checked="" type="checkbox"/>	
Summary for Last Billing Month		<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Error Report for Current Month		<input checked="" type="checkbox"/> 3	<input checked="" type="checkbox"/>	
Detailed for Current Month		<input checked="" type="checkbox"/> 4	<input checked="" type="checkbox"/>	
▶ Summary Report for Current Month		<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"/>	
Detailed for Today	21/Aug/2023 13:55:26	<input type="checkbox"/> 5	<input checked="" type="checkbox"/>	

The key reports that should be configured and automated to email out are:

- Error Report for Last Full Month (1)
- Detailed for Last Billing Month (2)
- Error Report for Current Month (3)
- Detailed for Current Month (4)
- Detailed for Today (5) – *Optional / Setup on request of based on Supplier's circumstances.*

Error Report for Last Full Month (1)

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 and all check should be conducted as per .

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

Detailed for Last Billing Month (2)

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 (3)

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.

Detailed for Current Month (4)

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

Min recommended schedule frequency → weekly.

Detailed for Today (5)

This report provides a detailed transaction listing for the day.

Min recommended schedule frequency → daily / on the transmission days.


By default this report is not configured by the Caplink Support team and is used as an alternative to the “Details for Current Month” report depending on Supplier’s circumstances.

3. Automating a report to email someone

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

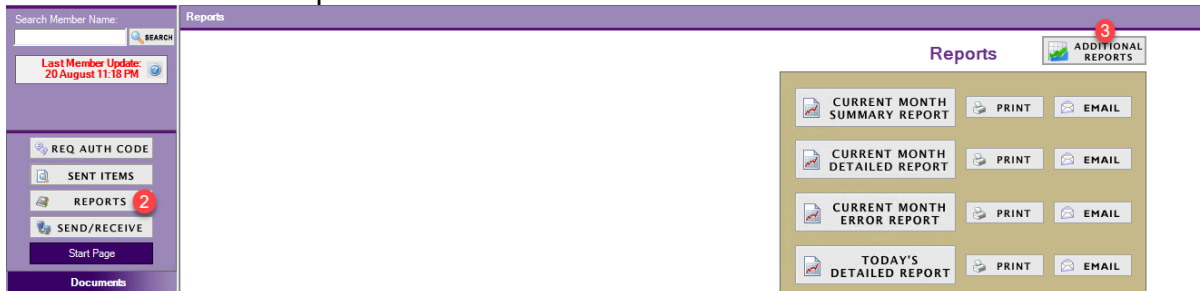
- Select the report you wish to automate from “Additional Reports” (only the “Batch” related reports can be automated)
- Select the “Schedule” tab (if not already configured, tick “Auto Run” to activate) – *Reports that cannot be automated do not have a “Schedule” tab*

The screenshot shows the 'Add / Edit Reports' window with the 'Schedule' tab selected. The 'Name' field contains 'Detailed for Last Billing Month'. The 'Report Run Type' is set to 'Batch'. The 'Auto Run' checkbox is checked. The 'Frequency' is set to 'Weekly'. The 'Start Time' is set to '0:00'. The 'File Output' section has 'PDF' selected. The 'Email' section has 'Email Addresses' and 'Email Body' fields. A red arrow points to the 'Schedule' tab.

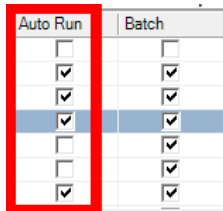
- Select the schedule frequency, file output format and the email address(es) to which you wish the reports sent to.
- When done, select 

4. Changing an existing email address

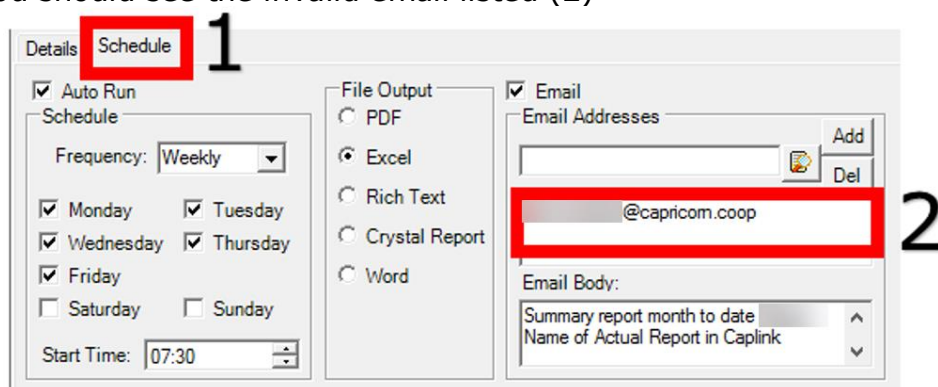
1. Log into CapLink
2. Select "Reports"
3. Select "Additional Reports"



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



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)



7. Select address you want to change 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 applicable) use 