



# M5 Commercial Fuel Template

## Quick Guide

Version 24.x  
Last Modified 24.0 | March 2024

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## Overview

The M5 Commercial Fuel Template is an interface that allows customers to load fuel transaction information from an outside vendor into the M5 System using a .csv file on the Interface Manager frame in M5. Some basic set up and configuration is required to ensure fuel transactions are processed appropriately and successfully into the system.

## Setup and Frames Summary

Interface processing will involve the following three frames:

- **Interface and Screen Names** – Make sure the interface is enabled for use.
- **Interface Manager** – Use this frame to run the interface.
- **Interface Reject Manager** – Use this frame to correct any rejected or unprocessed records from interface runs.

The interface will need M5 to be setup to treat the fuel as an expense or commercial product, which requires the appropriate configuration in M5 for the following:

- **Product Main** – You must set up and configure product codes to define the type of fuel being processed.
- **Vendor Main** – You must set up an M5 Vendor Main record for the outside fuel vendor.
- **Product Setup Unit** – You must set up fuel types and tank capacities for all applicable units.
- **Location Main Fueling Location** – You must designate a location as a valid fueling location for the interface parameter, Default Location.

# 1. Interface and Screen Names

To use the interface, you will first need to enable the interface on the Interface and Screen Names frame.

SAVE

UNDO

REFRESH

DELETE

FIND

## Interface and Screen Names

Interface Names (Record 412 of 561)

Interface Name	Display Name	Template	Disabled
M5-TELEMATICS-INTF	Telematics Interface	TELEMATICS.xml	<input type="checkbox"/>
M5-TELEMETRY-INTF	Telemetry Interface	TELEMETRYFOCUS.xml	<input type="checkbox"/>
M5-TELO-GPS-DIAGS-INTF	Telogis GPS and Diagnostic	TelogisGPSDiags.xml	<input type="checkbox"/>
M5-TELO-METER-INTF	Telogis Meter Interface	TelogisMeter.xml	<input type="checkbox"/>
M5-TELO-METERV2-INTF	Telogis Meter Interface V2	TelogisMeterV2.xml	<input type="checkbox"/>
M5-TENN-FUELMAN-INTF	Tenn Fuelman Interface	TennFuelman.xml	<input type="checkbox"/>
M5-TMD-METER-INTF	TMD Meter Interface		<input type="checkbox"/>
M5-TMPL-COMM-FUEL-INTF	M5 Commercial Fuel Template	TMPLCommFuel.xml	<input type="checkbox"/>
M5-TMPL-PARTPO-EXPORT	M5 Part PO Export Template		<input type="checkbox"/>
M5-TMPL-VENDOR-INTF	M5 Vendor Template	TMPLVendor.xml	<input type="checkbox"/>
M5-TNT-ABU-FUEL-INTF	TNT ABU Fuel Interface		<input type="checkbox"/>
M5-TNT-EURO-FLEET-INTF	TNT Euro Fleet		<input type="checkbox"/>
M5-TNT-FUEL-INTF	TNT Fuel		<input type="checkbox"/>
M5-TNT_PO-INTF	TNT Purchase Order Interface		<input type="checkbox"/>
M5-TOR-FUEL-INTF	Toronto Comm Fuel Interface	TorCommFuel.xml	<input type="checkbox"/>
M5-TOR-PRO-FUEL-INTF	Toronto PRO Fuel Interface	TORPROFuel.xml	<input type="checkbox"/>

To ensure the interface is enabled, find the interface record **M5-TMPL-COMM-FUEL-INTF** on the list. Clear the **Disabled** checkbox and select **SAVE** at the top of the frame. The interface is now available for use on the **Interface Manager** frame.

## 2. Location Main – Fueling Location

In order to assign locations to the fuel transactions or use the **Default Location** parameter on the Interface Manager frame, you will need make sure the location is designated a **Fuel Location** on the Location Main frame.

The screenshot shows the 'Location Main' configuration window. At the top, there are buttons: SAVE, UNDO, REFRESH, DELETE, FIND, ATTACH, MORE, and RELATED. Below these is the title 'Location Main'. Under 'Location Information', there is a 'General Location' field with the value 'A', a 'Fuel Location' dropdown menu, and a 'Disabled' dropdown menu set to 'No'. A tab bar below contains: General Information, Configuration (highlighted with a red box), Hierarchy, Inventory, Maintenance, Product Codes, and Vendor Email. The 'Configuration' tab is active, showing 'Type of Location' options: Fuel Location (checked and highlighted with a red box), Delivery Location (checked), Parking Location (checked), and Motor Pool Location (checked). To the right are fields for Recovery Center, Reporting Region, Parking Maint Loc (set to CNLOC1), and Interface Code. Below these is a 'Replacement LTD Usage Factor' field set to 1.00. At the bottom is a 'Motor Pool Reservation Information' section with fields for Reservation Advance Notice (0 Day(s)), Reservation Duration (0 Day(s)), KeyValet Location (KeySystems), and Late Pickup Hours (0 Hour(s)).

On the **Configuration** tab, select the **Fuel Location** checkbox. Select **SAVE** at the top of the frame to update the location record.

### 3. Vendor Main

In order to assign vendors for the fuel transactions or use the **Default Vendor** parameter on Interface Manager, valid vendors must be set up on Vendor Main.

SAVEUNDOREFRESHDELETEFINDATTACHMORE▼RELATED▼

Vendor Main

Vendor Information

Number: COMMFUELName: Commercial Fuel VendDisabled: No ▼

+

GeneralPayableNotesService CodesLocationsDistributorsReorderVendor Gateway

Mailing Address

Name: Commercial Fuel Vendor

Address: 3636 Spring Garden

City: Oklahoma CityState / Zip Code: OK73008

Country: USA

Region: County:

## 4. Product Main

Valid product codes must also be set up for the fuel transactions on the Product Main frame.

SAVE UNDO REFRESH DELETE FIND ATTACH RELATED ▾

### Product Main

**Fuel Product Identification**  
Number:  Description:

**General Information**  
Type:   
Unit Issue:  Gallons  
Markup:   
Associated Part:   
Fuel Type:  Gasoline

**Billing Defaults**  
Inside Bill Item:  Fuel charges  
Outside Bill Item:  Fuel charges  
Mark Up Bill Item:  Fuel charges  
Job Reason:   
Job Code:   
Apply Tax As:

**Pricing Information**  
Unit Price:   
Flat Mark Up:   
Mark Up %:   
Override Std Price:



## 5. Product Setup Unit

Product types and tank capacities must be defined for units on the Product Setup Unit frame.

SAVE

UNDO

REFRESH

DELETE

FIND

RELATED ▾

### Product Setup Unit

Unit Information

Unit: 34228 2017 CHEVY SUBURBAN Status: Active Unit

Fuel Edit

Enforce Valid Meter: ☐ Retry Meter 1 Count: 0

Restrict to Shift: ☐ Retry Meter 2 Count: 0

Employee Required: ☐ Validate Employee: ☐

+ Products Cards

Product Edit Mode

☒ Manual ☐ Copy From Techspec

Product Information for unit 34228 (Record 1 of 1)

Prod No	Description	Last Issue Date	First Meter	Second Meter	Tank Capacity	Max Daily Fuelings	Max Daily Qty	ORVR Fitted	Primary Flag
G	Fuel		0	0	31.00	2		<input type="checkbox"/>	<input type="checkbox"/>

## 6. Input File Format

This interface reads text file of units and fuel charges and updates fuel costs and meter information in a .csv file in M5 and is treated as commercial fuel (f\_comm\_prod\_chg).

Field Name	Size/ Format	Start Position Delimited Format	Start Position Fixed Format	XML tag for XML Format	Comment
Unit Number	30 char max	1	1	<UNIT_NO>	Valid M5 Unit or Department Number.
Transaction Date	Date MM/DD/YYYY HH24:MI:SS or DD/MM/YYYY HH24:MI:SS	2	31	<ISSUE_DATETIME>	Issue date – must be a valid date in the format determined by the DATE FORMAT parameter. Only two date formats are recognized: MM/DD/YYYY HH24:MI:SS DD/MM/YYYY HH24:MI:SS
Vendor	12 char max for M5 vendors 50 char max for translated values	3	50	<VENDOR_NO>	Must be a valid M5 vendor or exist as a translation in Interface Code Translations under the Vendor dropdown. If blank in the file, the DEFAULT VENDOR parameter value is used.
Location	6 char max for M5 locations. 50 char max for translated values.	4	100	<LOCATION>	Must a valid M5 location or exist as a translation in Interface Code Translations under the Location dropdown. If blank in the file, the DEFAULT LOCATION parameter value is used.
Issue Qty	8, numeric	5	150	<ISSUE_QTY>	Must be numeric. Explicit decimal places. Can be negative for credits.
Fuel Type	2 char max for M5 products. 50 char max for translated values	6	158	<PROD_NO>	Must be valid M5 Product code or exist as a translation in Interface Code Translations under the Product dropdown.
Meter	9, numeric	7	208	<METER>	Optional. Subject to all usual M5 meter validation rules.

## Setup and Frames Summary

Unit Cost	8, numeric	8	217	<UNIT_DO>	Must be numeric. Value is multiplied by Issue Qty to calculate Total dollars. Explicit decimal places.
User Data 1	15 char max	9	225	<USER_DATA_1>	Optional. User reference information. Value greater than 15 characters is truncated. Value is not validated.
User Data 2	15 char max	10	240	<USER_DATA_2>	Optional. User reference information. Value greater than 15 characters is truncated. Value is not validated.
User Data 3	15 char max	11	255	<USER_DATA_3>	Optional. User reference information. Value greater than 15 characters is truncated. Value is not validated.
User Data 4	15 char max	12	270	<USER_DATA_4>	Optional. User reference information. Value greater than 15 characters is truncated. Value is not validated.
User Data 5	15 char max	13	285	<USER_DATA_5>	Optional. User reference information. Value greater than 15 characters is truncated. Value is not validated.
User Data 6	15 char max	14	300	<USER_DATA_6>	Optional. User reference information. Value greater than 15 characters is truncated. Value is not validated.
Employee Number	11 char max	15	315	<EMP_NO>	Must be a valid M5 Employee Number. May be blank, but is mandatory if System Flag 5077 or Unit Product Setup Employee Required is set to Y.

## 7. Interface Manager

SAVE UNDO REFRESH DELETE FIND

### Interface Manager

Interface: M5 Commercial Fuel Template

Parameter Group: NEW Name: RUN 145

Interface Parameters (Record 3 of 9)

Number	Description	Value
1	INPUT FILE PATH	C:\MFIVE\INTERFACEFILES\EXAMPLE\FUEL\IN
2	OUTPUT FILE PATH	C:\MFIVE\INTERFACEFILES\EXAMPLE\FUEL\OUT
3	FILE PREFIX	OKC
4	EMAIL TO	FUELPERSONNEL@FLEETORG.COM
5	EMAIL FROM	INTERFACE@ASSETWORKS.COM

Refresh

Current Execution Schedule (Loaded 0 records)

ID	Description	Status	Schedule Date	Last Run	Frequency	Exclude	Holidays	Submitted By	Run Desc
----	-------------	--------	---------------	----------	-----------	---------	----------	--------------	----------

Schedule Details

Run Interval: Once

Exclude weekends and holidays: ☐

First execution date/time: 18-Jun-2019 08:35:44

Schedule / Reschedule

### Additional Parameters

Interface Parameters (Record 7 of 9)

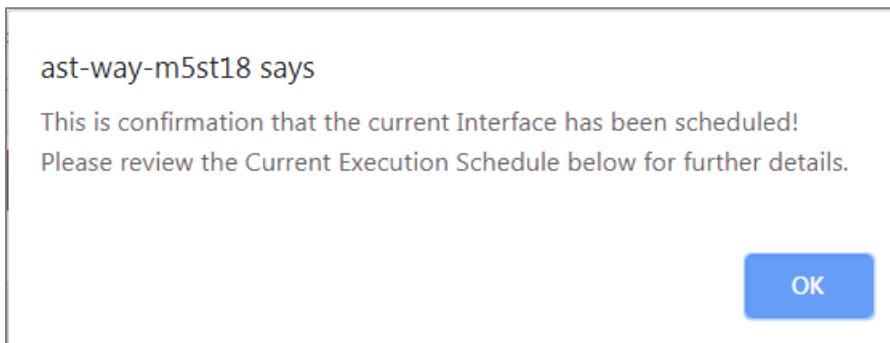
Number	Description	Value
6	DEFAULT LOCATION	A
7	DEFAULT VENDOR	COMMFUEL
8	METER OVERRIDE (Y/N/I/X)	N
9	USE FILE PRICE (Y/N)?	Y


## 8. Interface Parameter Explanations

- **Parameter Group** - NEW will be the default, but after a name is entered in the **Name** parameter, the dropdown contains any names that have been created
- **Name** - Enter the name for the saved interface parameters. This allows for multiple users to run the same interface by entering a name of what their particular interface run is so that the user does not have to reenter their interface parameters.
- **Input File Path** - The full path name of where to find the input file.
- **Output File Path** - The full path name for the read in file to be put.
- **File Prefix** - Enter a file prefix. Required entry if you have multiple files in the input folder or are using multiple parameter groups pointing to the same input folder. Otherwise, it can be left blank.
- **Email To** - Email address of the person to receive notice of the interface completion.
- **Email From** - Defaults to [interface@assetworks.com](mailto:interface@assetworks.com), however, this can be changed by the user if another email address is preferred.
- **Default Location** - Enter a valid M5 fuel location.
- **Default Vendor** - Enter a valid M5 vendor number.
- **Override Meter Warning** - If **Y**, then only valid meters will be updated and rollovers will not cause a reject in the fuel interface but instead will save the transaction and not update the meter. If **N**, then both rollovers and invalid meter warnings will be sent to the REJECT MANAGER. If **X**, all meter readings from the input file will be ignored, however, the fuel transactions will still post to M5. If **I**, then transactions with meter warnings will not be rejected and usage will not be updated. Transactions will post with the Bad Meter flag set to **Y**.

## 9. Interface Run Instructions

1. Place the vendor's .csv file out on the batch server in the directory designated in the INTERFACE PARAMETER, *Input File Path*.
2. Select the **run interval**. You can run this interface as often as necessary. Options are once, minutes, hours, days, months.
3. If you want to **exclude weekends and holidays** from the run interval select the checkbox.
4. Set the **first execution date/time**.
5. Select the **Schedule/Reschedule** button to run the interface.
6. You will receive the following confirmation message:



-  The scheduled run displays in the **Current Execution Schedule** section. If necessary, the run can be deleted by selecting the row and then the **DELETE** button, followed by the **SAVE** button to cancel the run.

7. After the file is read in, it will be renamed with a date/time stamp and put in the directory on the batch server as designated in the INTERFACE PARAMETER, *Output File Path*.

## 10. Interface Reject Manager – Error Processing

If the interface run encounters any issues or errors when processing the input file, you can correct and troubleshoot those errors on the Interface Reject Manager frame.

All rejected records are written to a table, INTERFACE\_REJECT, for reprocessing. The Interface Reject Manager frame allows you to correct whatever was invalid about the record and reprocess it as if the record had been run through the interface.

A new batch (shown as Stat ID) row is created each day, accumulating all of the rejects that happened in the day.



Scheduling the interface to run in shorter intervals will create more statistics rows which may be more cumbersome when handling the rejects.

SAVE
UNDO
REFRESH
DELETE
FIND
MORE ▾

### Interface Reject Manager

Interface: Commercial Fuel Template ▾

**Interface Statistics (Record 1 of 41)**

Stat ID	Run Date	Total Processed	Pass	Fail	Successful Reprocess	Elapsed Time In Hrs.
3764	08/17/2023 12:06:38	39	0	39	0	0
3171	08/30/2022 09:39:35	39	1	38	0	0
3090	08/15/2022 15:33:33	2	1	1	0	0
2851	03/29/2021 05:53:37	0	0	0	0	0

**Filter Assistance (Loaded 6 records)**

Enabled	Field	Operator	Value	High Value
<input type="checkbox"/>	Location	equal ▾		
<input type="checkbox"/>	Error Number	equal ▾		
<input type="checkbox"/>	Invoice Number	equal ▾		
<input type="checkbox"/>	Ref Number	equal ▾		
<input type="checkbox"/>	Product Number	equal ▾		

Search Resubmit All

**Interface Rejects (Loaded 39 records)**

Resubmit	Error Stat ID	Msg No	Location	Issue Date/Time	Type	Unit/Dept	Meter Reading	Product	Qty	Emp No.	Unit Cost	Tax Percent	Issue Type	
<input type="checkbox"/>	3764	214	CNLOC1	11/12/2019 13:31:55	Unit ▾	CN01	1	1	M	2	1.00	\$1.983800	0.000000	Commercial
							2		H					

There will be one row per interface run that displays the number of records that failed and how many passed.

- To view the rejected records, select the applicable row.
- You can view a list that displays each record that failed and the error message by hovering the mouse over the error message number.
- You can correct the problem and resubmit or delete the record.



The **Filter Assistance** i-frame can also be used to filter the results for a specific run.

## 11. Interface Code Translations

If the product codes in the interface file do not match those product codes in M5, then a translation can be made in the Interface Code Translations frame.

SAVE UNDO REFRESH DELETE FIND

### Interface Code Translations

Item Selection  
Type: Products

Interface Codes (Record 768 of 768)

Interface	M5 Values	Description	Interface Code
Vectren Fuelman Fuel Interface	1	GASOLINE test	2
Vectren Fuelman Fuel Interface	5	Dallas Fuel Product	5
Vectren Voyager Fuel Intf	UL	DEF/Urea (Liters)	01
WEX Fuel Interface	1	GASOLINE test	01
WEX Fuel Interface	3	PROPANE	03
WEX Fuel Interface	1	GASOLINE test	12
WEX Fuel Interface	1	GASOLINE test	13
WEX Fuel Interface	7	ELECTRIC	88
Wakefield Fuel Interface	2	Unleaded Gas	DSL
Wakefield Fuel Interface	1	GASOLINE test	GAS
WinC6 Fuel	1	GASOLINE test	U
York Phoenix Fuel Interface	D1	Diesel Fuel	01
M5 Commercial Fuel Template	G	Fuel	145



## Updates

Release	Section	Description
23.2	<a href="#">6. Input File Format</a>	Added Employee Number to interface format.
23.2	<a href="#">10. Interface Reject Manager</a>	Updated the image to include the new Employee No. field.