



# TRIPCard

## Quick Reference Guide

Version 24.x  
Last Modified 24.0 | March 2024

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## Technical Support

AssetWorks provides several ways to connect with the Customer Support team. Be prepared to provide detailed information to the representative. If you are reporting an issue by email, include screen shots of your problem. This will provide the Customer Support representative with the information needed to respond quickly and effectively.

Customer Support is available Monday through Friday, 7:00 a.m. to 7:00 p.m., Eastern Time.

Telephone: 1-610-225-8300

Email: [M5Support@AssetWorks.com](mailto:M5Support@AssetWorks.com)

Website: <https://community.assetworks.com/hc/en-us>

The support website can be used to open issues, subscribe to user groups and download documentation, as well as to access the latest AssetWorks news. For secure access to the website, contact Customer Support by calling the number above.

## Product Compatibility

Refer to the Product Compatibility, Certification and Notices information on the AssetWorks website for requirements including operating system information, databases, Crystal reports, network protocol, HTTP servers and browsers that are supported.

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# TRIPCard Overview

The screenshot shows the AssetWORKS TRIPCard portal. At the top, there's a header with the AssetWORKS logo and a 'TRIP Card' dropdown menu. To the right of the dropdown is a 'Location' dropdown menu showing '05CPYD - 24TH STREET CAR POOL'. Below the header is a navigation bar with links: Home, Sample Menu, Change Menu (with a red '46' badge), Favorites, History, Dashboard (with a yellow warning icon), Reports (with a red '1' badge), Messages (with a red '0' badge), and Notifications (with a red '0' badge). Below the navigation bar is a toolbar with buttons: Save, Undo, Refresh, Delete, and Find. Below the toolbar is a large banner with the AssetWORKS TRIPCARD logo and the text 'Timely | Reportable | Integrated | P-Card'. Below the banner is a section with 'Customer Code: AA5YU - 230 EAST CENTRAL UNIVERSITY' and 'Account Code: XL642'. Below this section are two links: 'Transaction Summary' and 'Card Maintenance', each preceded by a red gear icon.

TRIPCard is a branded MasterCard product used by AssetWorks customers for on the road fuel purchases and/or parts and maintenance purchases. The purchase data is integrated automatically into FleetFocus without any customer interaction and the customer has access to this information both in FleetFocus and through a custom TRIPCard portal. The portal displays real-time preauthorization details as well as failed and completed fuel transactions, with the ability to edit and resubmit rejected transactions.

The automated integration and the instant access to real-time pre-authorized transactions provides significant time savings to the customer and allows for better fuel management practices.

There are two interfaces, a service, and an online portal needed to support TRIPCard. Additionally, tables and views have been created to store and retrieve the data used by TRIPCard.

The customer has access to important transaction data as it is received from Comdata (the card issuer) and is able to modify and resubmit rejected transactions as they occur.

## Implementation Overview

Transaction data is integrated through a **TRIPCard interface** that processes the files obtained by the **File Retriever Program**. The Interface is scheduled to run frequently enough to process the files provided by **Comdata**.

- Near real time integration of purchase data into FleetFocus through web services (or automated batch integration).
- Real time exception alerts and preauthorization details.
- Issue / Cancel / Request New Cards.
- Manage vehicle and driver information.
- Department security and authorizations.
- Notifications for declined transactions.

Interface: TripCard Interface ▼

Interface Parameters (Loaded 4 records)

Number	Description	Value
1	DEFAULT LOCATION	NORMM
2	DEFAULT VENDOR	1
3	EMAIL	USER@ASSETWORKS.COM
4	METER OVERRIDE (Y/N/I/X)	Y

Screenshot of the TRIPCard Interface

## TRIPCard Portal

The TRIPCard portal has been developed to allow for ease of viewing and management of the transaction data. The portal is accessed directly from a link in M5. The user has the ability to view preauthorized transactions as they occur in real time, and will also have access to completed or rejected transactions as they are posted, usually within 24-48 hours.

The screenshot shows the AssetWORKS TRIPCARD portal interface. At the top, there's a header with the logo and navigation links. Below the header, there's a section for Customer Code (AA5YU - 230 EAST CENTRAL UNIVERSITY) and Account Code (XL642). The main section is titled 'Transaction Summary' and includes tabs for 'Preauthorization', 'Failed transactions', and 'Completed transactions'. A table displays transaction data with columns for Date, Auth #, Status, Card #, and Vehicle/Driver. A 'Preauthorization Detail' sidebar on the right shows details for a specific transaction.

Date	Auth #	Status	Card #	Vehicle/Driver
11/02/2018 09:38:45	350930	Authorized	XXXX-XXXX-XXX...	116 VEHICLE

**Preauthorization Detail**

Trans Date: 11/02/2018 09:38:45  
Auth #: 350930  
Status: Authorized

Screenshot of the TRIPCard Portal

The TRIPCard Portal has (2) Sections:

- Transaction Summary
- Card Maintenance

This screenshot shows the AssetWORKS TRIPCARD portal with the 'Transaction Summary' and 'Card Maintenance' sections collapsed. The interface displays the Customer Code (AANND - 580 DCS FLEET) and Account Code (XI848). The main section is titled 'Transaction Summary' and includes a gear icon for 'Card Maintenance'.

**AssetWORKS TRIPCARD**  
Timely | Reportable | Integrated | P-Card

Customer Code: AANND - 580 DCS FLEET Account Code: XI848

Transaction Summary

Card Maintenance

Screenshot of the TRIPCard portal with sections collapsed

# 1. Transaction Summary

AssetWORKS  
**TRIPCARD**  
Timely | Reportable | Integrated | P-Card

Customer Code: AANND - 580 DCS FLEET Account Code: XI848

Transaction Summary

Preauthorization Failed transactions Completed transactions

Screenshot of the TripCard portal tabs.

The **Transaction Summary** is expanded by default when the **TRIPCard** portal is first accessed. Within the **Transaction Summary** section, there are (3) tabs:

- Preauthorization
- Failed Transactions
- Completed Transactions

To the right of each tab is a collapsible details pane.

Customer Code: AANND - 580 DCS FLEET Account Code: XI848

Transaction Summary

Preauthorization Failed transactions Completed transactions

Show previous 30 minutes

Preauthorization Detail

Select the  icon to collapse the Transaction Summary menu.

The  icon will open a pop-up window information about the profiles.

Settings

Profiles

Profile ID	Profile Name
526	OMES FLEET
001	OMES FLEET
002	OMES FLEET
003	OMES FLEET
004	OMES FLEET
005	OMES FLEET
006	OMES FLEET
007	OMES FLEET
008	OMES FLEET
009	OMES FLEET
010	OMES FLEET
011	OMES FLEET
012	OMES FLEET
013	OMES FLEET
014	OMES FLEET
015	OMES FLEET
016	OMES FLEET
017	OMES FLEET
018	OMES FLEET
019	OMES FLEET

Daily Transaction Limit: \$ 2,500.00

Daily Limit: \$ 10.00

Cycle Transaction Limit: \$ 2,500.00

Cycle Limit: \$ 999.00

Cancel Ok

## Preauthorization tab

**AssetWORKS TRIPCARD**  
Timely | Reportable | Integrated | P-Card

Customer Code: AANND - 580 DCS FLEET Account Code: XI848

Transaction Summary

Preauthorization Failed transactions Completed transactions

Show previous 30 minutes

8 records found

filter by card # filter by vehicle/driver

Date	Auth #	Status	Card #	Vehicle/Driver
11/02/2018 10:59:37	398096	Authorized	XXXX-XXXX-XXX...	090 20-061 UNIT

**Preauthorization Detail**

Details

Trans Date: 11/02/2018 10:46:31

Auth #: 390034

Status: Authorized

Screenshot of the Preauthorization Tab.

The **Preauthorization** tab within the portal displays Authorized and Declined purchases in real-time. This information allows the user to react to possible fraudulent or unauthorized activity in real-time, instead of waiting for a once a week batch file or end of month invoice.

Transaction Summary

Preauthorization Failed transactions Completed transactions

Show previous 30 minutes

No data to display

filter by card # filter by vehicle/driver

Date	Auth #	Status	Card #	Vehicle/Driver
11/02/2018 11:12:13	405700	Authorized	XXXX-XXXX-XXXX-8358	090 20-209 UNIT
11/02/2018 11:07:32	402883	Authorized	XXXX-XXXX-XXXX-8192	090 20-191 UNIT
11/02/2018 11:06:23	402176	Authorized	XXXX-XXXX-XXXX-2426	090 50-063 UNIT
11/02/2018 11:05:15	401475	Authorized	XXXX-XXXX-XXXX-1808	090 40-202 UNIT
11/02/2018 11:03:43	400562	Authorized	XXXX-XXXX-XXXX-8901	090 20-434 UNIT

Preauthorization Detail

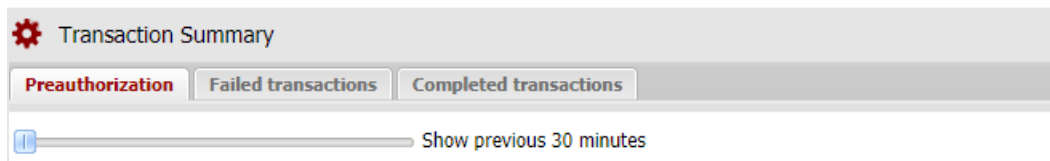
Screenshot of the Preauthorization tab with the Preauthorization Detail pane collapsed.

Information displayed within this tab includes:

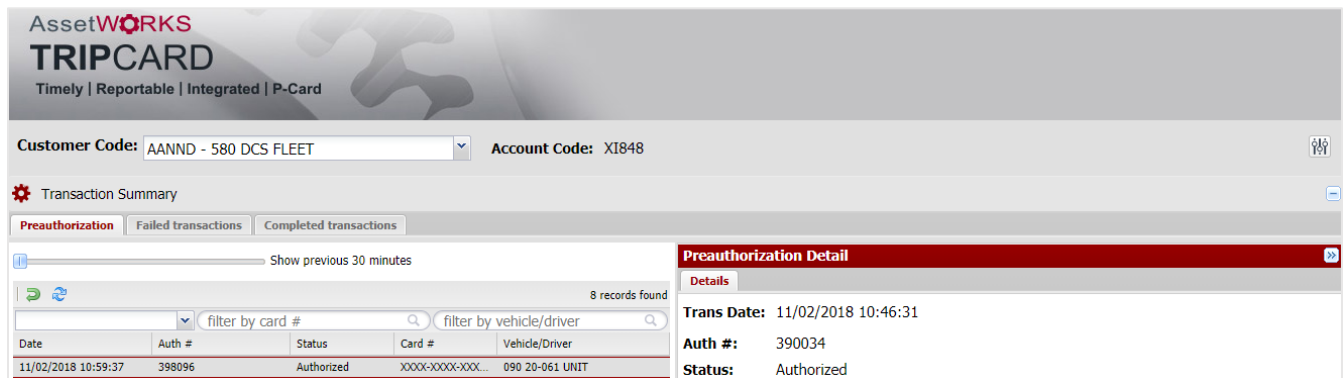
- Date and Time of the Transaction
- Authorization Number
- Status (Authorized or Declined)
- Card Number (Number is masked except for the last 4-digits)
- Vehicle/driver information

This information can be sorted and filtered (Authorized/Declined, Card #, or by Vehicle/Driver) for custom viewing.

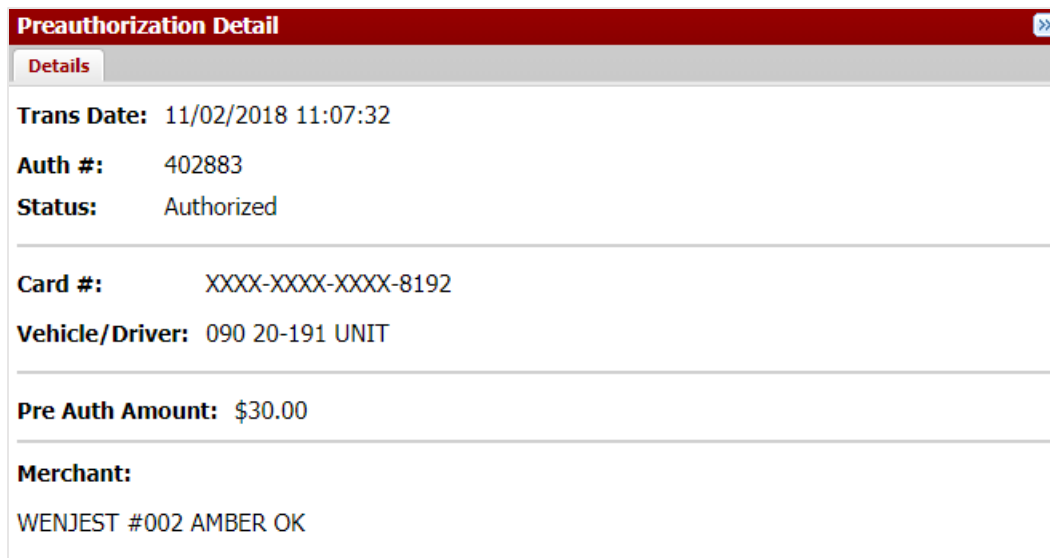





At the top of the grid is a slider which defaults to the last 30 minutes of data received. The user can slide this control to the right to see entries further back in time. For performance considerations, the amount of data returned will be limited and paged.



The **Preauthorization Details** pane to the right displays the same information in addition to the Pre-Authorization Amount (not necessarily the actual amount, this is for verification from the bank that funds are available) and the general merchant information (name, city and state).



Screenshot of the Preauthorization Detail pane.

To collapse the details pane, select the  icon.



All data received from Comdata is set in Central time zone.

## Failed Transactions tab

**AssetWORKS TRIPCARD**  
Timely | Reportable | Integrated | P-Card

Customer Code: AANND - 580 DCS FLEET Account Code: XI848

Transaction Summary

Preauthorization Failed transactions Completed transactions

Displaying 1 - 10 of 8014

Date	Card Number	Card Token	Vehicle/Dept	Odometer	Error C	Merchan	Produc	Qty	Cost	Reject	Refere	Resubm
04/02/201...	XXXX-XXXX...	269C3437A2		3649	192	CON...	A09	17.32	\$2.42	180...	04C...	
04/05/201...	XXXX-XXXX...	269C34K4R9		984	192	PHILL...	A09	7.05	\$2.48	180...	04C...	
04/03/201...	XXXX-XXXX...	272E67U3G9		312	192	PHILL...	A09	13.44	\$2.52	180...	04C...	
03/30/201...	XXXX-XXXX...	267F67F4L7		13614	192	PAW...	A09	10.52	\$2.52	180...	04C...	

**Failed Transaction Detail**

Details Flag

Save

Trans Date: 04/02/2018 13:09:00

Message: 192 - Unit Number cannot be BLANK.

The **Failed Transactions** tab displays purchases that have been rejected by FleetFocus. These transactions are displayed as soon as the transaction has been processed by the bank and the **TRIPCard interface** processes the data. The **Failed Transactions** tab provides the user the ability to identify and resolve issues as they occur.

Transaction Summary

Preauthorization Failed transactions Completed transactions

Page 1 of 802

Date	Card Number	Card Token	Vehicle/Dept	Odometer	Error Code	Merchant	Product	Qty	Cost	Reject Id	Reference Number	Resubmit
04/02/2018 13:09:00	XXXX-XXXX-XXXX-1882	269C3437A2		3649	192	CONOCO - H&T QUICK STO	A09	17.32	\$2.42	180454	04C7KRHBNN-1	
04/05/2018 15:04:00	XXXX-XXXX-XXXX-1940	269C34K4R9		984	192	PHILLIPS 66 - ONCUE 01	A09	7.05	\$2.48	180525	04C7KTW05K-1	
04/03/2018 16:03:00	XXXX-XXXX-XXXX-2436	272E67U3G9		312	192	PHILLIPS 66 - SHEPHERD	A09	13.44	\$2.52	180479	04C7KSBH53-1	
03/30/2018 13:38:00	XXXX-XXXX-XXXX-6110	267F67F4L7		13614	192	PAWHUSKA SHORT STOP	A09	10.52	\$2.52	180432	04C7KQJ3KR-1	
04/02/2018 08:09:00	XXXX-XXXX-XXXX-8904	269C33W4L6		327	192	PHILLIPS 66 - ASAP GEN	A09	10.98	\$2.28	180449	04C7KR810F-1	
04/03/2018 16:02:00	XXXX-XXXX-XXXX-6492	267U96G2T2		3552	192	PHILLIPS 66 - KWIK CHE	A09	20.03	\$2.20	180478	04C7KSBHP0-1	
03/28/2018 16:05:00	XXXX-XXXX-XXXX-6419	267U96F6Q3		1838	192	PHILLIPS 66 - HUTCHS 1	A63	5.94	\$2.22	180393	04C7KPCRDH-1	
04/02/2018 15:59:00	XXXX-XXXX-XXXX-6419	267U96F6Q3		1881	192	PHILLIPS 66 - HUTCHS 1	A63	3.79	\$2.22	180456	04C7KRMXR3-1	
03/29/2018 12:46:00	XXXX-XXXX-XXXX-8920	269C33W4T3		586	192	KUM & GO #863	A09	10.77	\$2.25	180411	04C7KPW6VF-1	
04/03/2018 19:09:00	XXXX-XXXX-XXXX-8920	269C33W4T3		906	192	KUM & GO #863	A09	10.56	\$2.21	180484	04C7KSGFPR-1	

Sort Ascending  
Sort Descending  
Columns

Failed transaction information can be sorted and filtered for custom viewing. Select a failed transaction row to display specific details about the transaction to the right of the grid in the **Failed Transaction Detail** pane. To limit the data returned select the filter button to search by Card #, Unit/Dept, Odometer, Merchant, or Product. Information is retrieved and returned as it is typed and the data within the filter fields can be paged.

All failed transactions provide an error code and message that can be used to make adjustments to the failed transaction and then the transaction may be resubmitted to FleetFocus.

**Failed Transaction Detail** >>

Details | Map

Save

Trans Date: 03/11/2018 11:56:

Message: 192 - Unit Number cannot be BLANK.

Card #: XXXX-XXXX-XXXX-2484

Vehicle/Dept:

Product: A09 -

Qty: 14.03

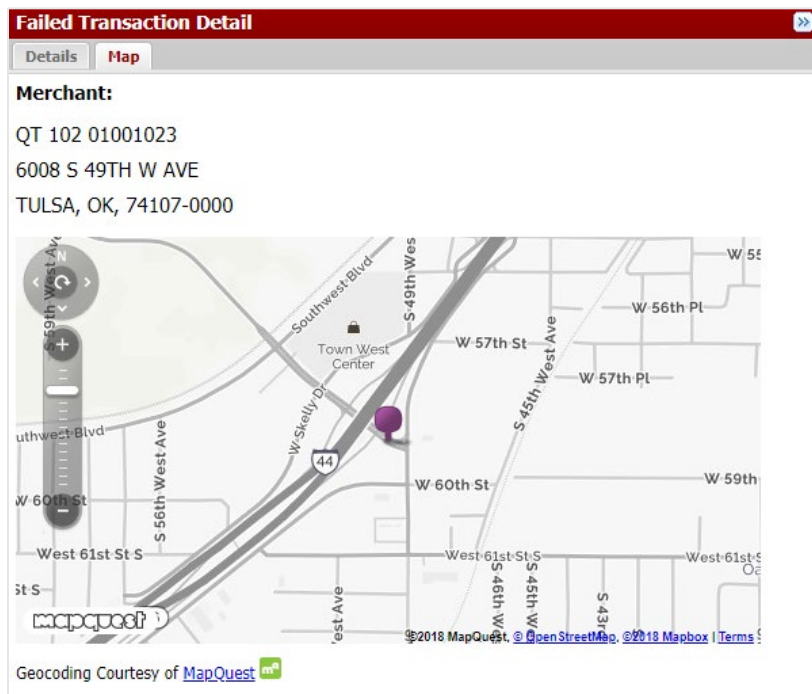
Unit Cost: \$ 2.06

Reference #: 04C7KCWBLL-1

Odometer: 46313

Merchant:  
QT 102 01001023  
6008 S 49TH W AVE

In addition to the information provided in the **Failed Transactions** grid, the **Failed Transaction Detail** pane includes the error message. There is also a **Map** tab that will show the location where the transaction occurred.



The **Failed Transaction Detail** pane can be collapsed by selecting the >> icon.



## Making Adjustments to a Failed Transaction:

1. Select the transaction row.

The screenshot shows the TRIPCard interface with the 'Failed transactions' tab selected. A table lists transactions with columns: Date, Card Number, Card Toki, Vehicle/D, Odometer, Error C, Merch, Produc, Qty, Cost, Reject, Refere, Resubm. The transaction for 03/11/2018 09:23:00 is highlighted. The 'Failed Transaction Detail' pane on the right shows the transaction details, including the date, message '192 - Unit Number cannot be BLANK.', card number 'XXXX-XXXX-XXXX-2666', and vehicle/dept information.

2. Make changes within the **Failed Transaction Detail** pane.

The screenshot shows the 'Failed Transaction Detail' pane with the following changes: The 'Trans Date' is set to '03/11/2018 09:23:00'. The 'Message' is '192 - Unit Number cannot be BLANK.'. The 'Card #' is 'XXXX-XXXX-XXXX-2666'. The 'Vehicle/Dept' is '010 004 2008 DODGE CHARGER'. The 'Save' button is visible.

3. After finished, select Save.

4. Select the **Resubmit** checkbox for that transaction.

The screenshot shows the 'Failed Transaction Detail' pane with the 'Resubmit' checkbox selected. A red arrow points to the 'Resubmit' checkbox in the table. The 'Save' button is visible in the pane.

5. Select Save

The screenshot shows the 'Save' button and the AssetWORKS TRIPCARD logo. The logo text reads: 'AssetWORKS TRIPCARD Timely | Reportable | Integrated | P-Card'.

## Completed Transaction tab

Preauthorization					
Failed transactions					
Completed transactions					
<div> <div></div> <div>Show previous 7 day(s)</div> </div>					
<div> <div> <div>Page 1 of 2</div> <div> <div></div> <div></div> <div></div> <div></div> </div> <div>Filter</div> </div> <div>Displaying 1 - 4 of 8</div> </div>					
Date	Card Numb	Unit/Dept	Vendor	Product	Qty
04/11/2014 04:22:00	3725	400481 - Ford Explor...	Sunoco	A01	14

The **Completed Transaction** tab provides access to completed purchases as soon as they are processed by the bank and the TRIPCard interface processes the data. There is no waiting for the batch report or invoice and no manual integration or data entry. The information is available as it is received through web services (approximately 24-48 hours after pre-auth) and is available to sort and filter.

Similar to the **Preauthorization tab**, there is a slider control that enables the user to view entries further back in time. The control defaults to the previous seven days. Additionally, data return can be limited by selecting the filter button to search by Card #, Unit/Dept, Merchant, or Product. The results will also be limited and paged for better performance.

Detailed product information is available by selecting on the desired row and includes product type, quantity, unit cost as well as vendor name and street address. Selecting the **Map** tab will show where the transaction occurred.

Completed Transaction Detail

Details

Map

Save

Trans Date: 04/11/2014 04:22:00

Card Number: 3725

Unit/Dept: 400481 - Ford Explorer

Product: A01

Qty: 14

Unit Cost: \$4.00

Invoice #: 998783465

Reference #: A675728

Total Cost: \$56.00

Vendor: Sunoco

Street: 251 W Dekalb Pike

City: King of Prussia

State: PA

Postal Code: 19406

*Screenshot of the Completed Transactions Detail pane with the TRIPCard Portal*

## 2. Card Maintenance

The **Card Maintenance** section of the TRIPCard portal allows the user to view the details regarding which vehicles and drivers, listed in FleetFocus, are assigned to the TRIPCard program.

### Drivers tab

The **Drivers** tab of the frame also allows the user to review purchase history per vehicle / driver.

**Card Maintenance**

**Drivers** | Cards

Page 1 of 14 | Filter | Add Driver | Displaying 1 - 10 of 138

Driver ID	First Name	Last Name	License Number	License State	Exists in FleetFocus
000063	RICK	BEACH		OK	✓
000096	JEFF	WILLIAMS			✗
000144	JERRY	BRANSCUM			✗
000211	DENNIS	MALM			✗
000229	BOND	HENDERSON		OK	✗
000359	DANNIE	PATTON			✗
000385	KENNETH	LOWRANCE			✗
000421	KASEY	MAHAFFEY			✗
000455	DAVID	STEER		OK	✗
000641	XERXES	GRIFFIN			✗

**Driver:** 000063 - RICK BEACH  
**License:**  
**State:** OK

**Last transaction date:**  
**Last transaction amount:**

Slider: Last 3 month(s)

**Total # of transactions:**      **Total amount:**

Product	Description	Qty	Amount	# of transactions
No records found				

Screenshot of the Card Management Section with the TRIPCard Portal

## Cards tab

**Card Maintenance**

Drivers **Cards**

Page 1 of 20 | Filter | Request Card | Displaying 1 - 10 of 195

Card Number	Card St	Card To	First Name	Last Name	Expiration Date	Exists in FleetFocus
XXXX-XXXX-...	ACT...	223...	15932	VEHICLE	10/01/2021	---
XXXX-XXXX-...	ACT...	239...	1-34656	VEHICLE	10/01/2017	---
XXXX-XXXX-...	ACT...	222...	MAIN	VEHICLE	10/01/2021	---
XXXX-XXXX-...	ACT...	222...	MAIN	VEHICLE	10/01/2021	---
XXXX-XXXX-...	CLE...	222...				---
XXXX-XXXX-...	ACT...	222...	MAINT	VEHICLE	10/01/2021	---
XXXX-XXXX-...	ACT...	222...	TAMMY	VEHICLE	10/01/2021	---
XXXX-XXXX-...	ACT...	246...	51	VEHICLE	10/01/2021	---
XXXX-XXXX-...	ACT...	246...	23	VEHICLE	10/01/2021	---
XXXX-XXXX-...	ACT...	246...	21	VEHICLE	10/01/2021	---

**Status:** ACTIVE | Update | **Expiration Date:** 10/01/2021

**Limits**

	Limit	Used	On-Hold	Available
Daily	\$9,999.00	N/A	N/A	\$9,999.00
Daily Transaction	\$99.00	N/A	N/A	\$99.00
Cycle	N/A	\$45.00	N/A	-\$45.00
Cycle Transaction	N/A	\$1.00	N/A	-\$1.00

One-time override | Recycle card limits

**Last transaction date:**  
**Last transaction amount:**

Slider: Last 3 month(s)

**Total # of transactions:**      **Total amount:**

Product	Description	Qty	Amount	# of transaction
---------	-------------	-----	--------	------------------

Screenshot of the TRIPCard Card Maintenance section

The **Cards** tab is used to manage card status (Blocked, Activate), request additional cards and reassign pre-defined card profiles. An administrator can select the Request Card icon and enter the relevant details to request a new card for a driver.

An administrator has the ability to mark a card as **ACTIVE** or **BLOCKED** on this frame.

**Card Maintenance**

Drivers **Cards**

Page 1 of 20 | Filter | Request Card | Displaying 1 - 10 of 195

Card Number	Card St	Card To	First Name	Last Name	Expiration Date	Exists in FleetFocus
XXXX-XXXX-...	ACT...	223...	15932	VEHICLE	10/01/2021	---

**Status:** ACTIVE | Update | **Expiration Date:** 10/01/2021

**Limits**

	Limit	Used	On-Hold	Available
Daily	\$9,999.00	N/A	N/A	\$9,999.00
Daily Transaction	\$99.00	N/A	N/A	\$99.00
Cycle	N/A	\$45.00	N/A	-\$45.00
Cycle Transaction	N/A	\$1.00	N/A	-\$1.00

One-time override | Recycle card limits

**Last transaction date:**  
**Last transaction amount:**

Slider: Last 3 month(s)

**Total # of transactions:**      **Total amount:**

Product	Description	Qty	Amount	# of transaction
---------	-------------	-----	--------	------------------

The One-time override icon allows the admin to authorize transactions that are outside of card limits on the pre-defined card profile.

For example, If the card profile allows fuel only purchases and the vehicle has gotten a flat tire and service is needed, the administrator can select the one-time override button for that card and the very next transaction will be authorized and allowed no matter what the purchase is.



After the transaction has taken place, the card profile will be reset to the original limits.

The Recycle card limits icon allows for the card limits to be reset if they have been exceeded within the cycle period.

A slider can be used to expand or contract the timeline for a transaction.

**Last transaction date:**  
**Last transaction amount:**

Slider: Last 3 month(s)

## Updates

Release	Section	Description
23.2	All sections	Applied miscellaneous writing style updates throughout the document.