AssetWORKS

TRIPCard

Quick Reference Guide

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

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.

TRIPCard - Quick Reference Guide

Version 24.x

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Contents

TRIPCard Overview

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.

Screenshot of the TRIPCard Portal

The TRIPCard Portal has (2) Sections:

- Transaction Summary
- Card Maintenance

Screenshot of the TRIPCard portal with sections collapsed

1. Transaction Summary

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.

Select the ⊟ icon to collapse the Transaction Summary menu.

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

Preauthorization tab

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.


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.
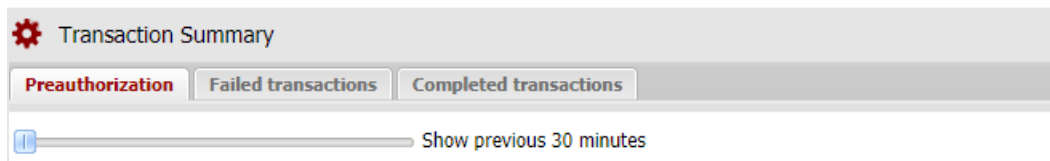
At the top of the grid is a slider which defaults to the last 30 minutes of data received. The user can slide this control to the right to see entries further back in time. For performance considerations, the amount of data returned will be limited and paged.
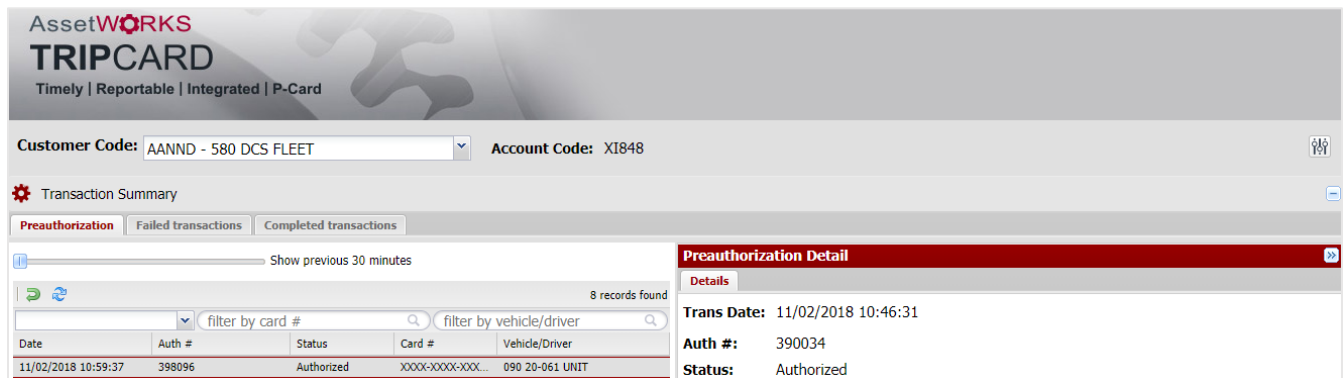
The **Preauthorization Details** pane to the right displays the same information in addition to the Pre-Authorization Amount (not necessarily the actual amount, this is for verification from the bank that funds are available) and the general merchant information (name, city and state).
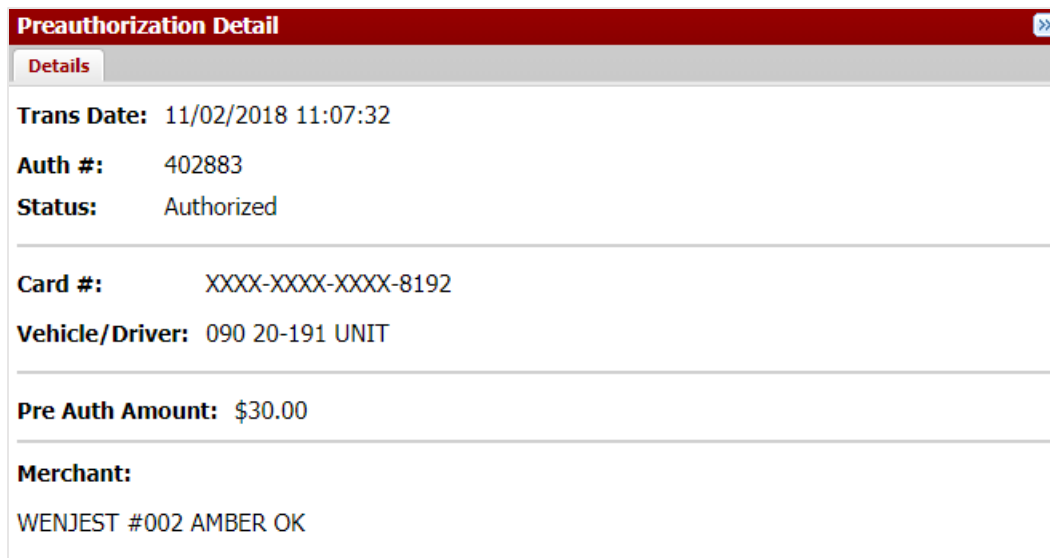
Screenshot of the Preauthorization Detail pane.

To collapse the details pane, select the icon.

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

Failed Transactions tab

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.

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.

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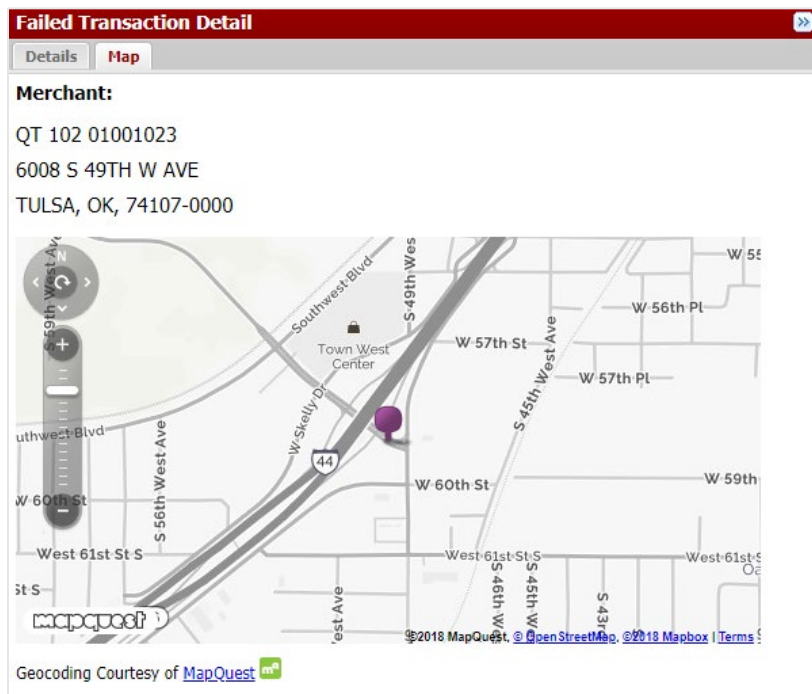
The **Failed Transaction Detail** pane can be collapsed by selecting the » icon.

Making Adjustments to a Failed Transaction:

1. Select the transaction row.

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

3. After finished, select [✓ Save] .

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

5. Select [💾 Save]

Completed Transaction tab

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.

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.

Screenshot of the Card Management Section with the TRIPCard Portal

Cards tab

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.

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.

Updates

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