MILLENNIUM WEXONLINE REPORT TRAINING
As of 09/26/2013

Summary:

The application offers various reporting tools to meet your analysis needs:

Ad Hoc Reports - Allows you to analyze transactions at a summary and detail level, and also assist with identifying activity that meets your exception criteria.

My Flexible Exception Reports - Offers you the opportunity to establish exception parameters, and receive reporting when activity falls outside of those thresholds.

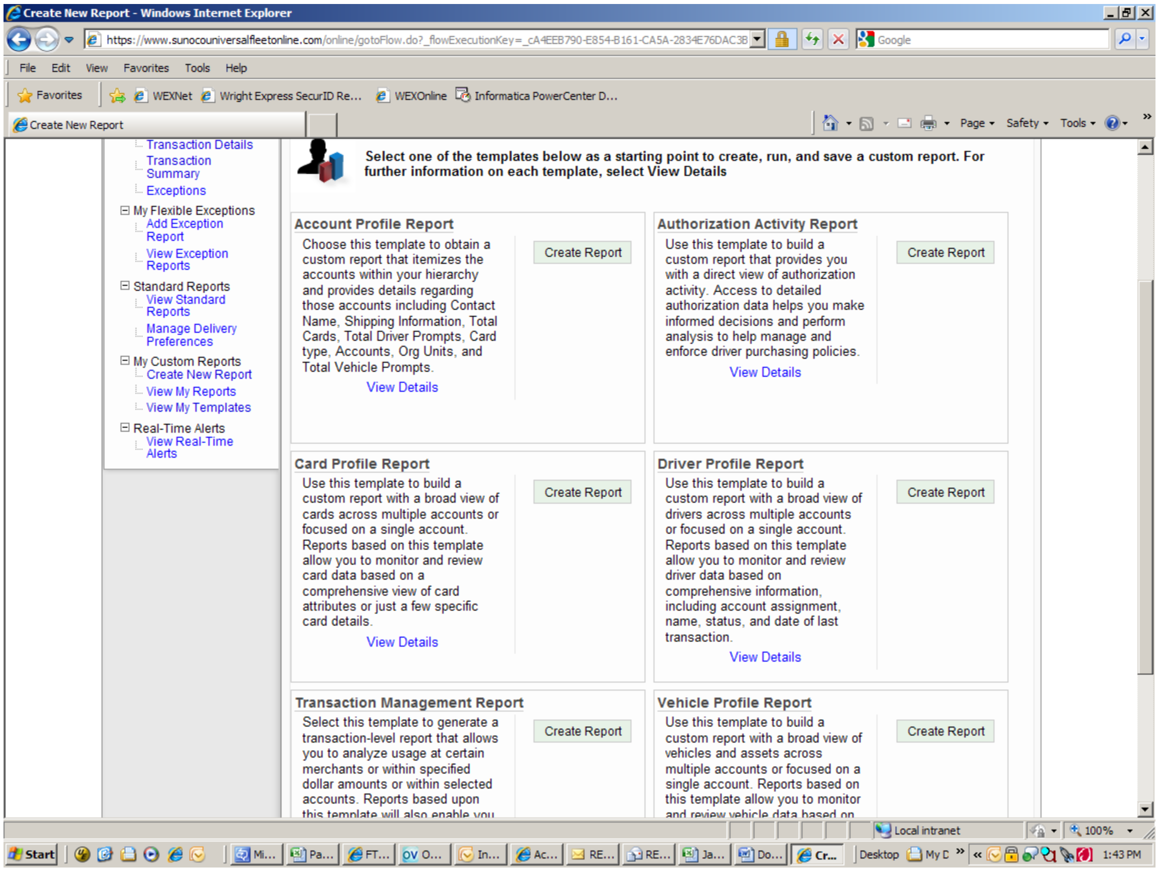
Standard Reports - Allows you to download any report products available at the user's level. Examples include Purchase Activity Reports and Account Reviews.

My Custom Reports - Utilize system templates to create your own customized reporting.

Navigate to the **Reports** tab

Select **Create New Report** under **My Custom Reports.**

You will see a list of Report Templates available



Account Profile Report:

This template allows you to generate reports that provide an overview of the accounts and org units within your hierarchy. For each account, some data elements available include address information (shipping, billing, primary), total cards and prompts.

Card Profile Report:

This template allows you to generate reports by which you can review cards and vehicle related information that’s captured in the WEX system. Some data elements include account name, account number, card number, status, setup date, vehicle description, authorization profile, asset ID number, VIN, etc. This report can be helpful in monitoring your vehicle inventory to ensure everything is up to date.

Driver Profile Report:

This template allows you to monitor and review driver data based on comprehensive information including account assignment, name, status, employee ID, and last transaction date.

Authorization Activity Report:

This template helps you build a custom report with direct view of authorization activity, including declined transactions. This is helpful in trouble-shooting declines, and making informed decisions to manage and enforce driver purchasing policies.

Transaction Management Report:

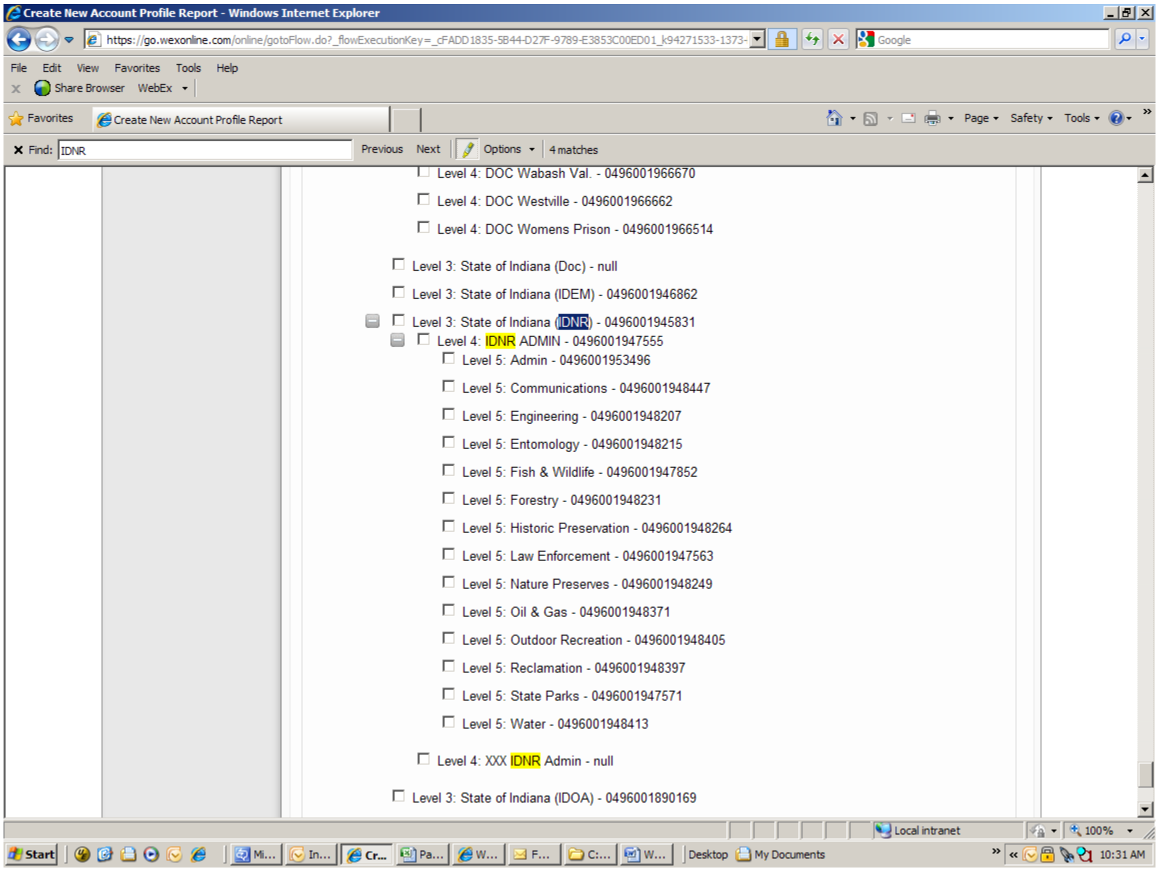
This template permits you to generate a transaction-level report, whereby you can analyze usage at certain merchants, within specified timeframes, or exceeding dollar amounts.

To start building your customized report, select the appropriate template by clicking “Create Report”

The system wizard will walk you through the same 6 steps:

Step 1:

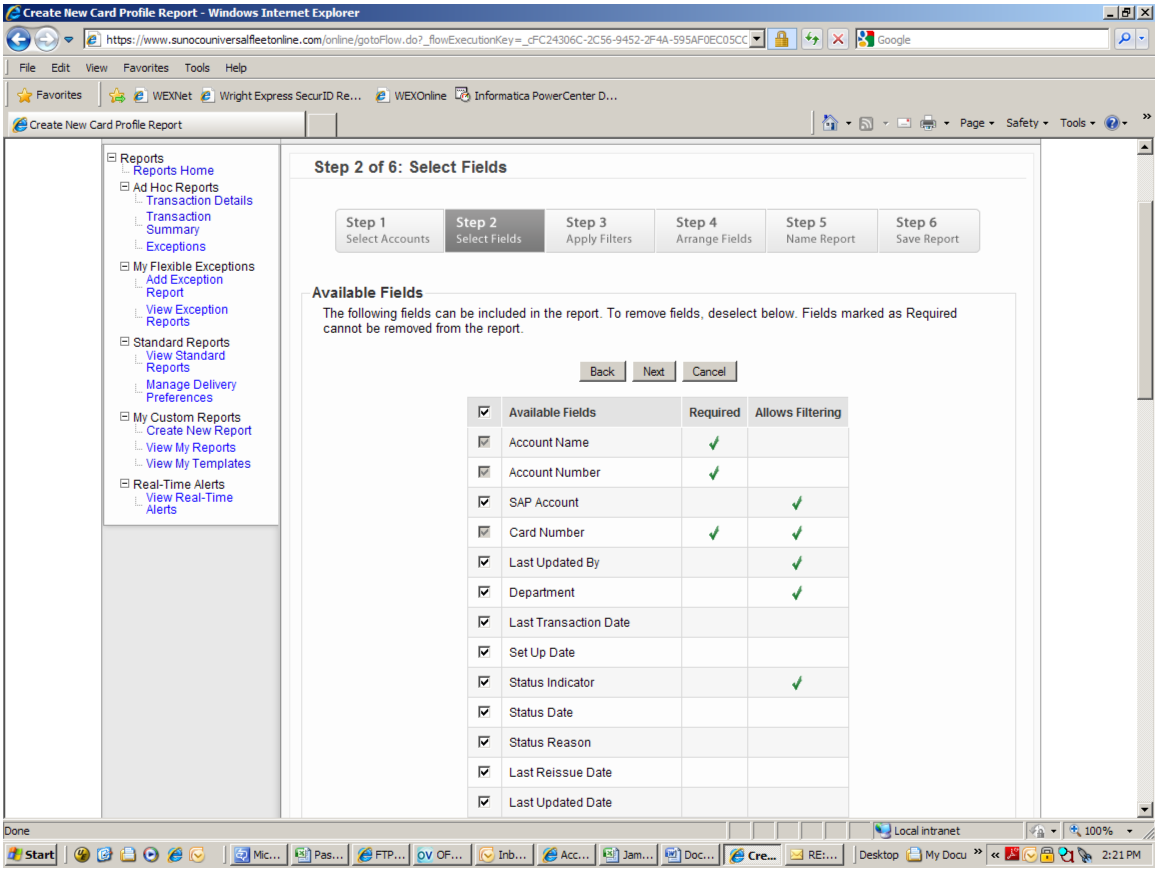
Select the hierarchy level, or which account (s) information you want included. *Note*: Any children nodes beneath the level (s) you chose, will be included.



Click Next

Step 2:

Select which fields you wish to include in the report. Deselect any that aren't needed by un-checking the box. Required fields will be grayed out.

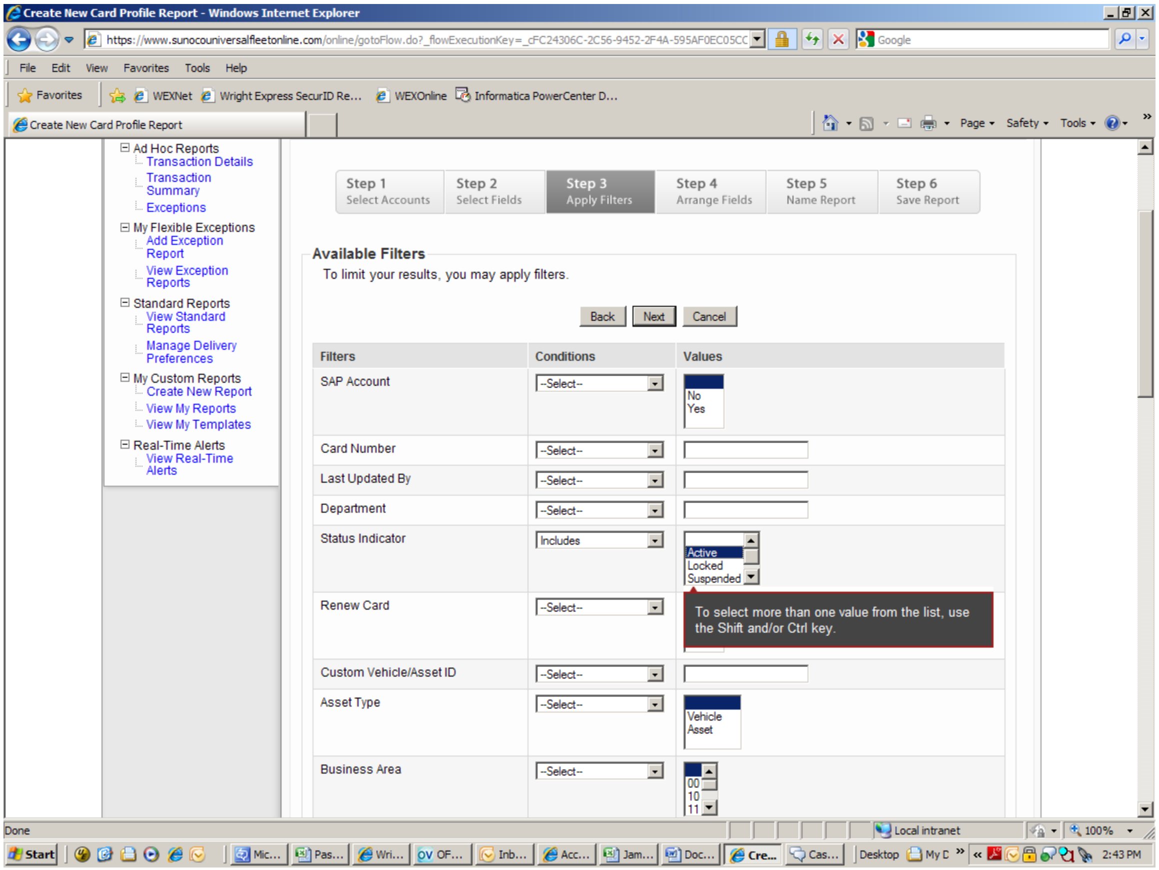


Click Next

Step 3:

This allows to you apply filters to query based on certain criteria.

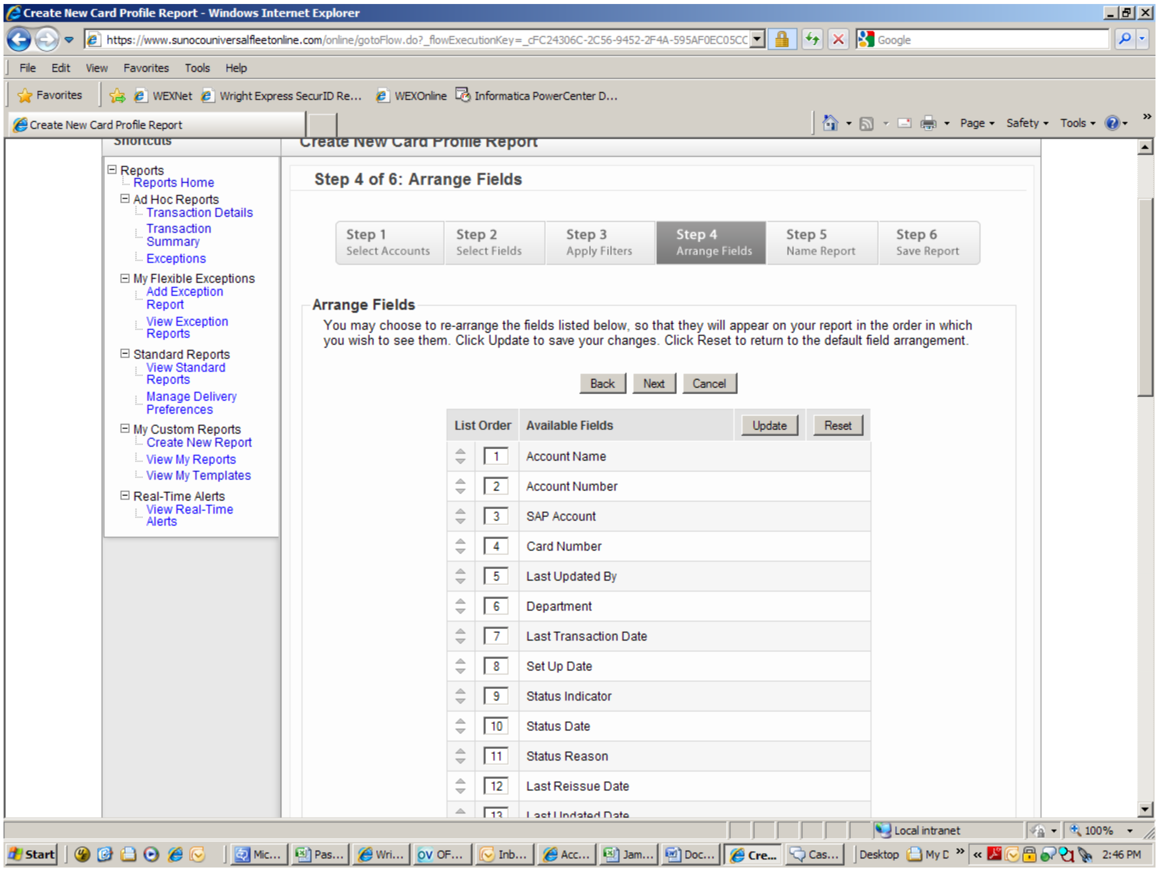
For example, to include only active cards Select *Status Indicator Includes* “Active”.



Click Next

Step 4:

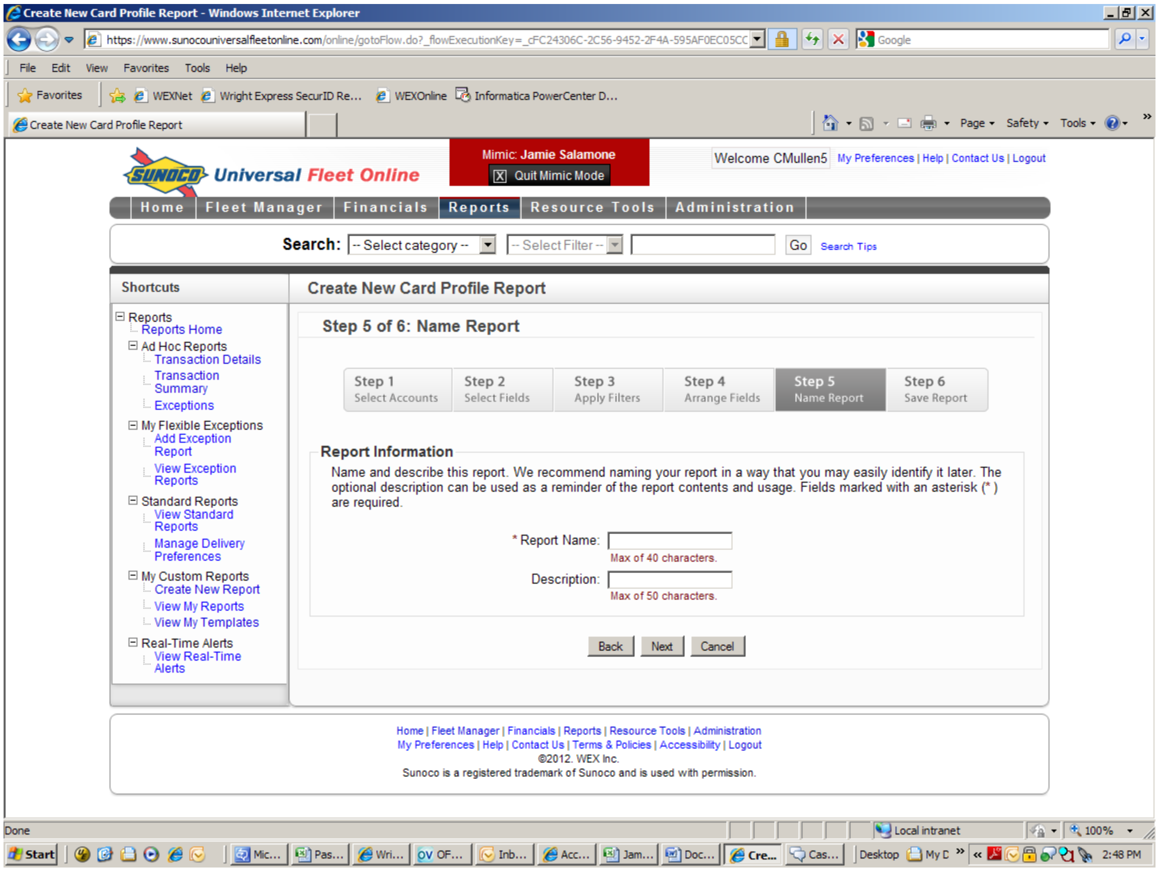
Select the order of which you would like the fields displayed based on what you chose in Step 2.



Select Next

Step 5:

Name the report. These must be unique. You can add a short description if it's helpful, but not required/



Click Next

Step 6:

Save the report.

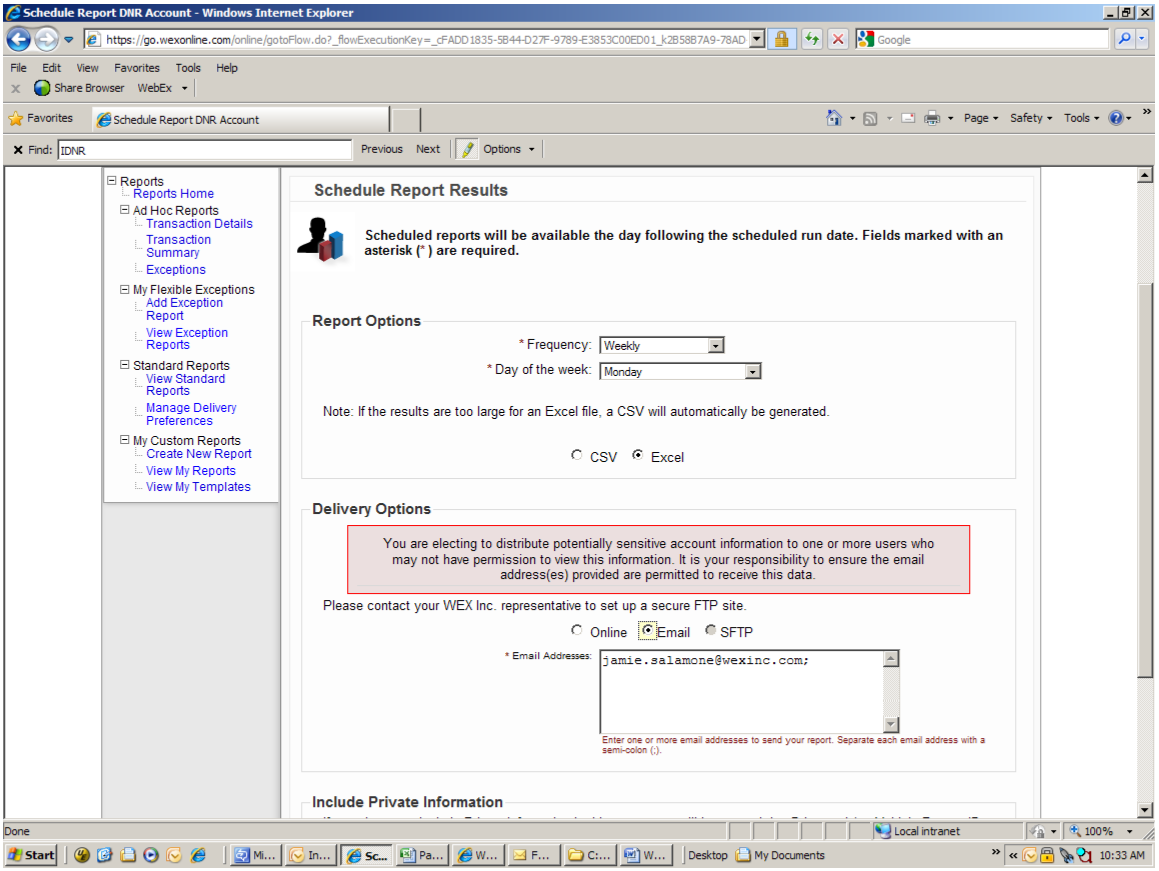
Save and Run now will save the report to your templates, so you can go back and run again at any time. It will also prompt you for a date range and export the results to excel.

Save will save to your templates, but not display the results.

Schedule with ask you to select the frequency to run the report automatically. The options are Daily, Weekly, Monthly, Quarterly, and Yearly.

Select the format- CSV or Excel

Select the Delivery Option- Online, Email, or FTP



Once your report is saved to “My Templates”, you can always go back and modify or run at any time.