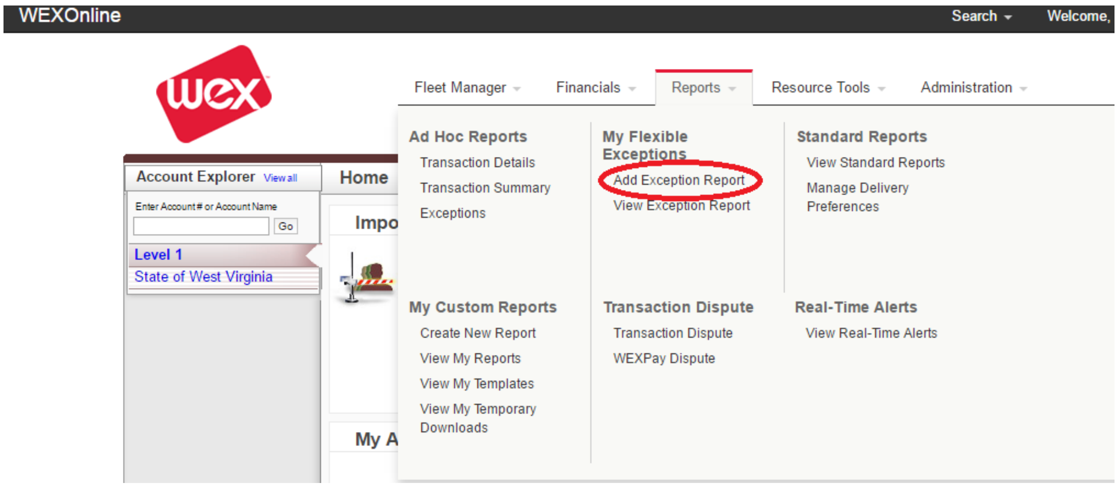
How to Create Flexible Exception Reports

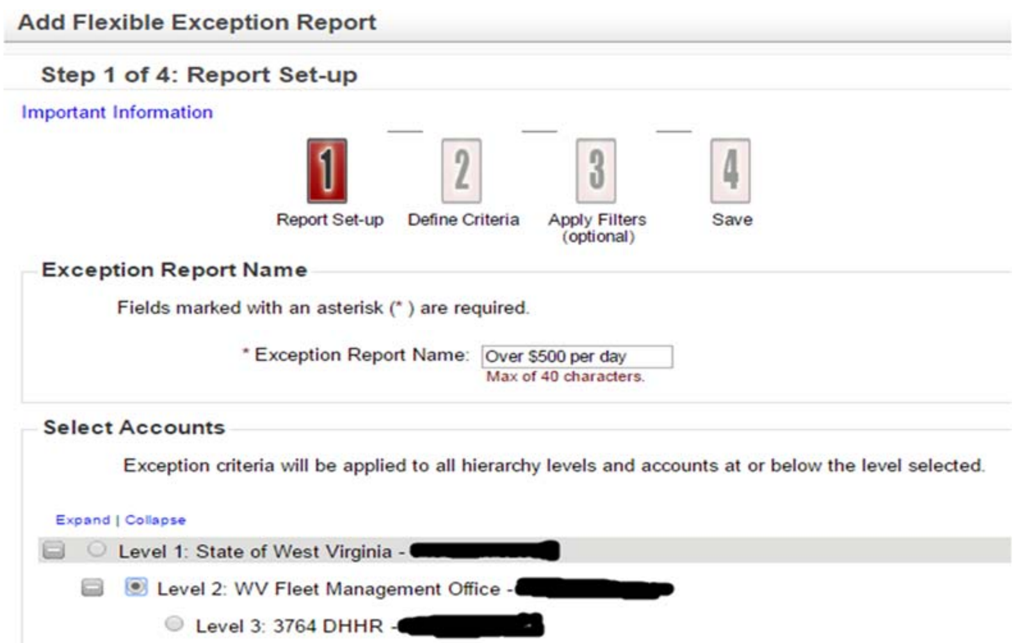
Flexible Exception Reports allow the user to monitor purchasing that occurs outside your agency's desired purchasing policies. These exceptions are generated on posted transactions. This enables you to receive online reports detailing any out-of-policy activity. The exception parameters can be set up based on purchasing related to cards, drivers, or vehicles.

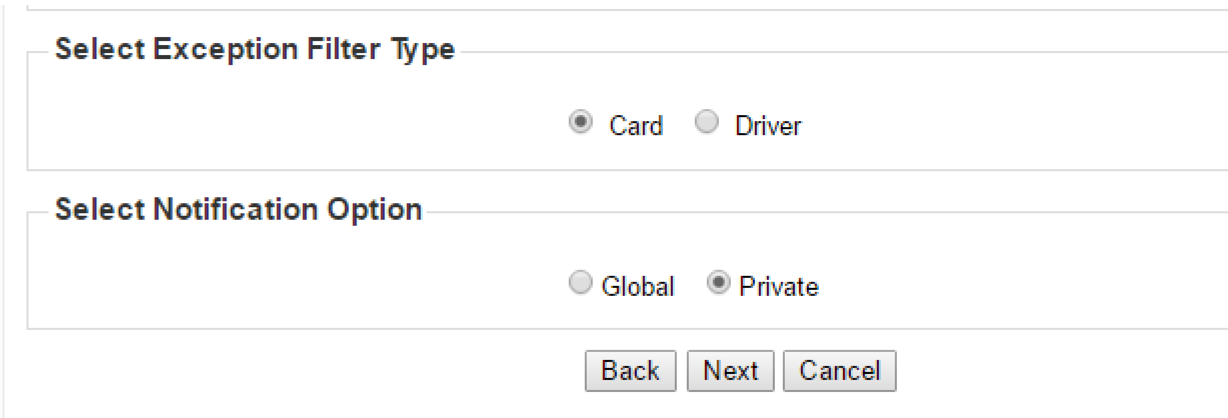
When a posted transaction triggers one of your exception criteria, you will be sent an email notification (the email the user has listed with WEX), letting them know that there is a report ready to review, as well as an alert on the Home Page in the Important Information Section.

Step 1 – Click on Reports. Click on Add Exception Report.

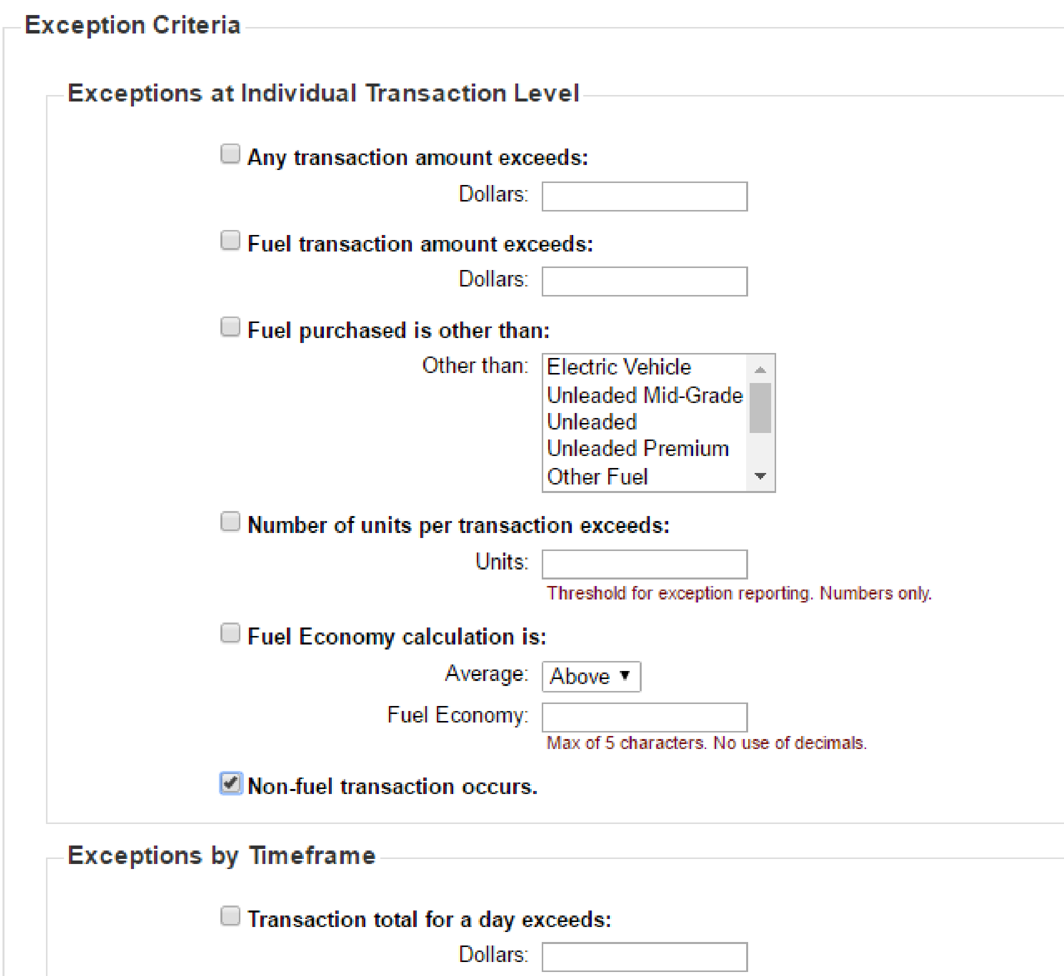


Step 2 – Name your report and select the agency or agencies you would like to set up the exception report on from the hierarchy. Scroll to the bottom of the page and select either card or driver and make sure the notification option is set to private. Click "Next". For training purposes, the example used is for non-fuel transactions for cards.

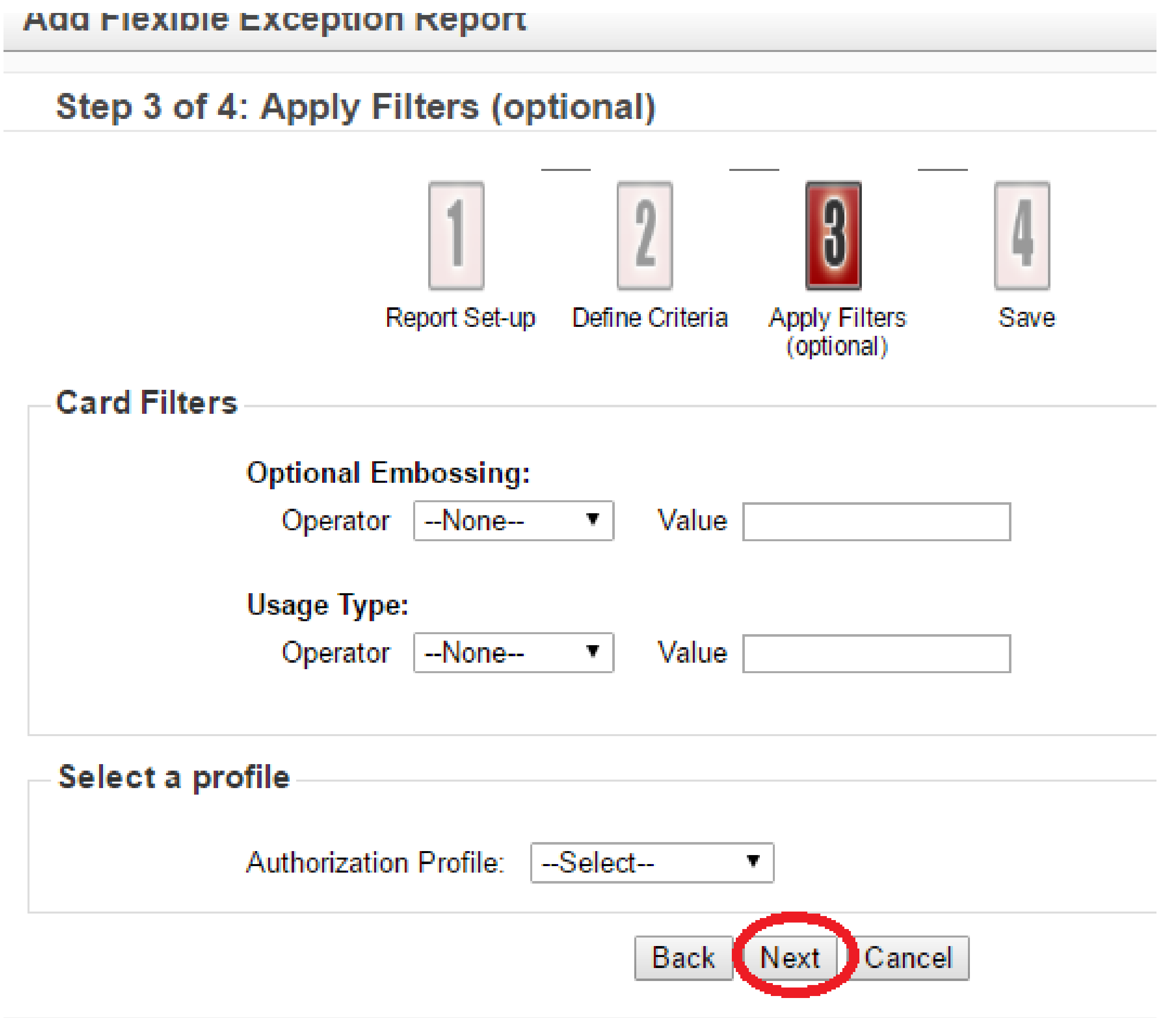




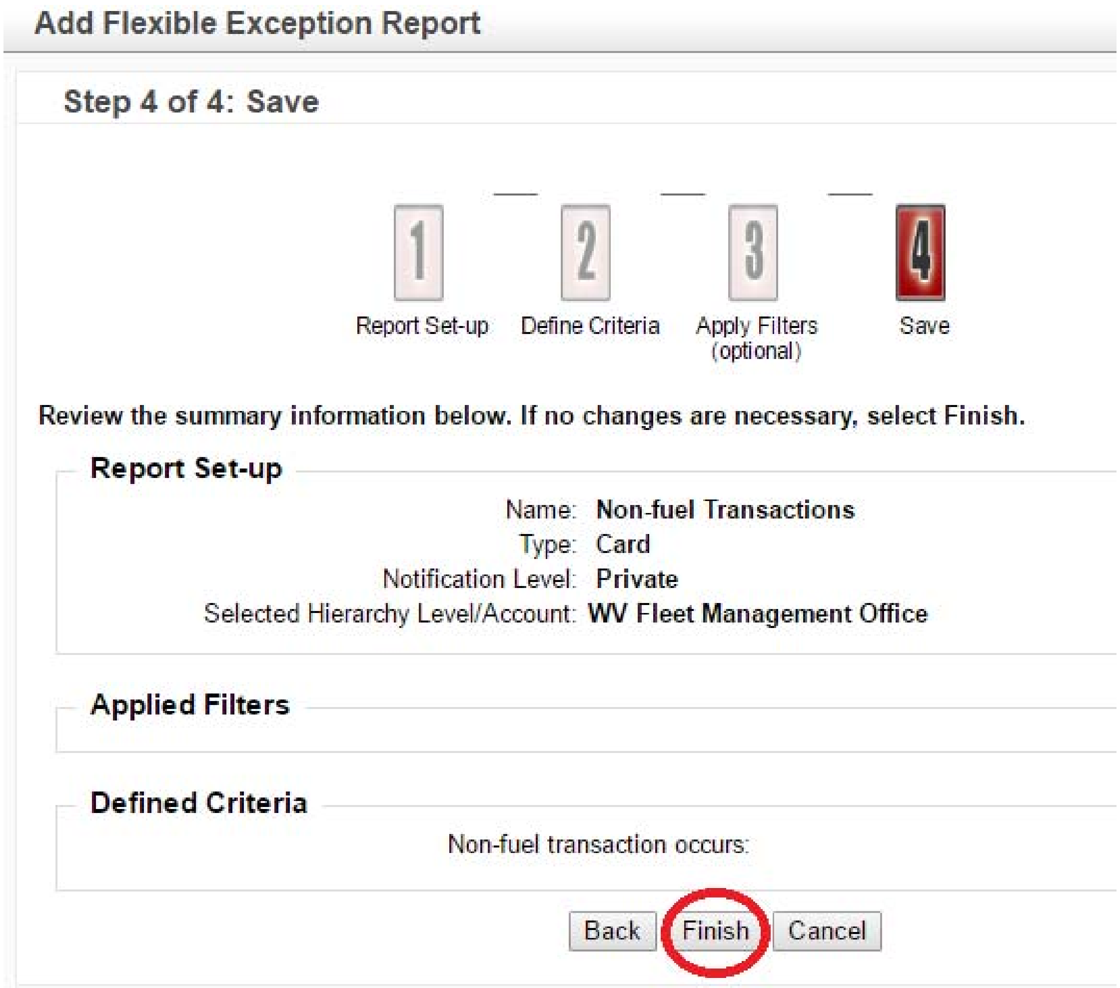
Step 3 – This is where you will define your criteria. The exception parameters that are offered on this step will be dependent upon the Exception Filter Type (Card or Driver) that you selected on the previous page. When you have selected the exception criteria, scroll to the bottom of the page and click “Next”. **Note** You can only select items from one criteria box for the report. These will be either Exceptions at the Individual Level, By Timeframe, or by When and Where. For training purposes, the example used was criteria for cards with non-fuel transactions.



Step 4 – Applying optional filters. This step is for looking at specific cards and/or drivers and for the specific Authorization profile levels the cards are grouped. The State of West Virginia has 4 authorization profile levels. It is easiest to not select any optional filters and Click “Next”.



Step 5 – Review summary of the Flexible Exception Report. If the report is ok, click “Finish” and WEX will start sending notifications to your user profile’s email address when a transaction meets the criteria selected. If the report needs to be changed, click the “Back” button to where you need to change the criteria, make the changes and click the “Next” button until the Summary is presented again.

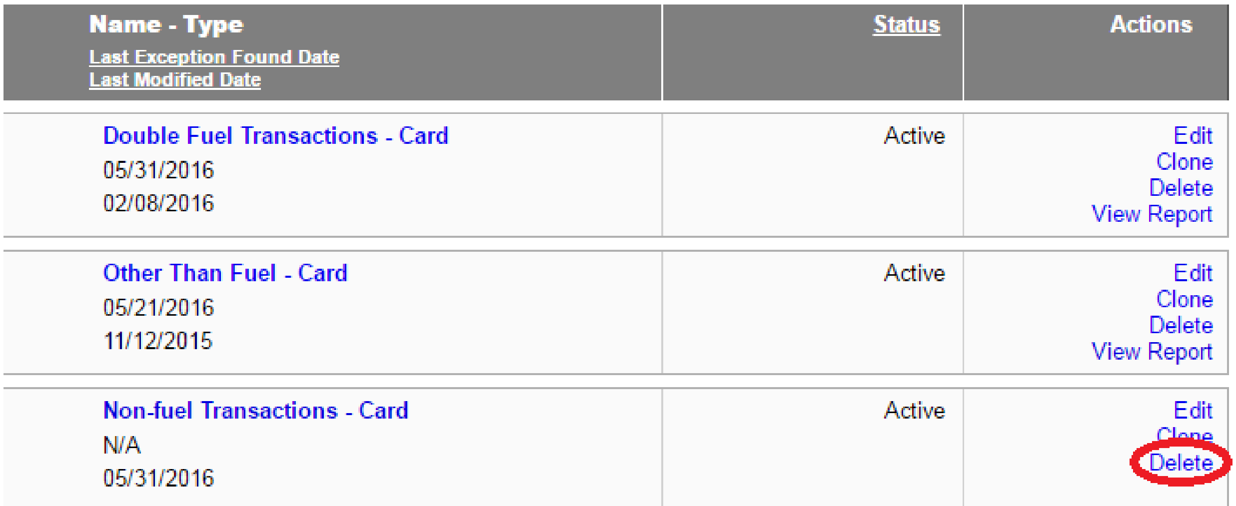


To access any saved reports, you will go to My Flexible Exceptions tab and click View Exception Report. Reports that are available will show, "View Report" option in the Actions column.

How to Delete and Exception Report

Step 1 – Click on Reports and then click on View Exception Reports.

Step 2 – When you find the report you wish to delete, click on “Delete” under the Actions column beside the report to be deleted. WEX’s application will initiate the “Delete Flexible Exception Report” window, where the system will need you to confirm that you wish to delete the report.



Step 3 – Click “Delete” to finish deleting the report or “Cancel” to cancel the deletion request.