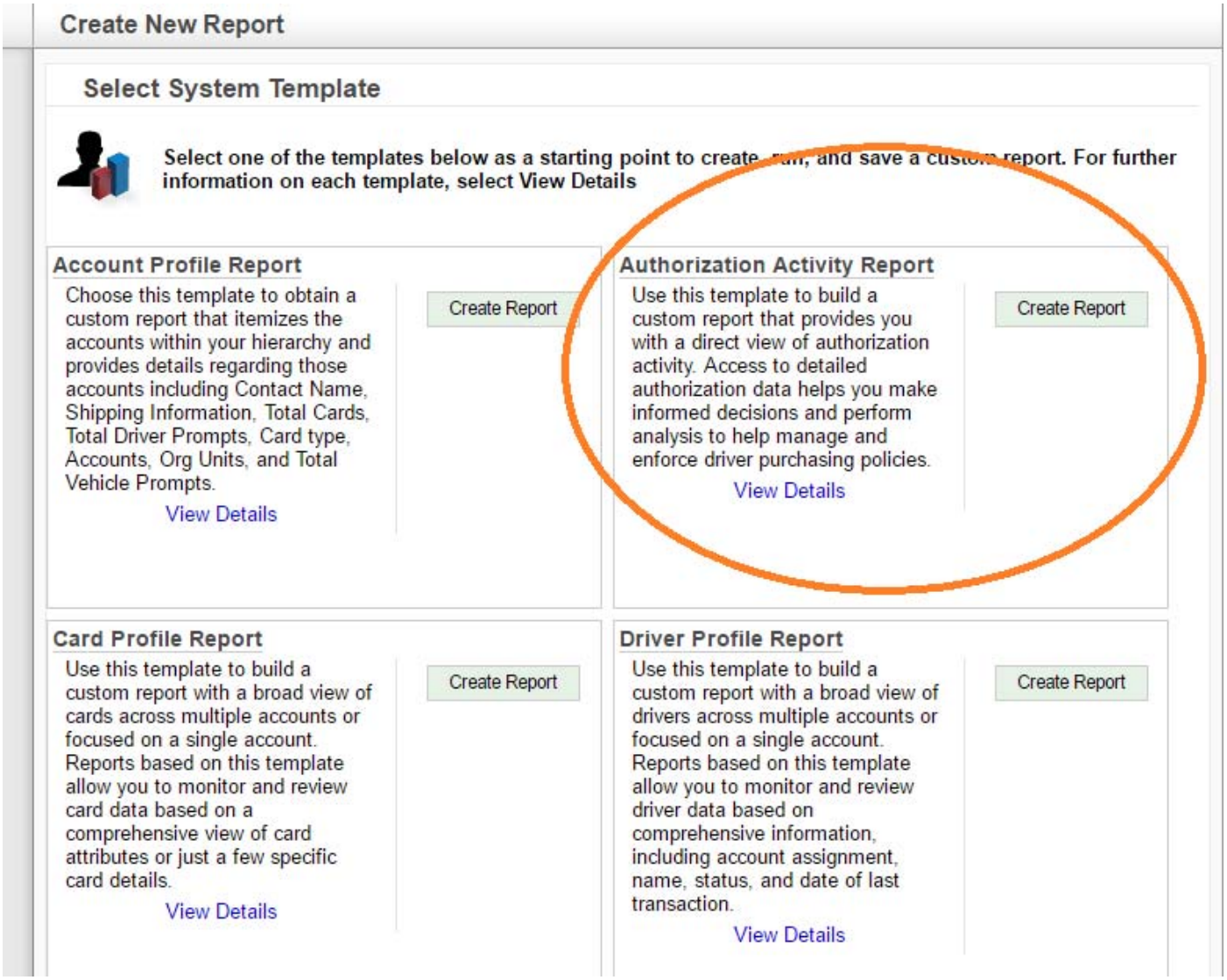
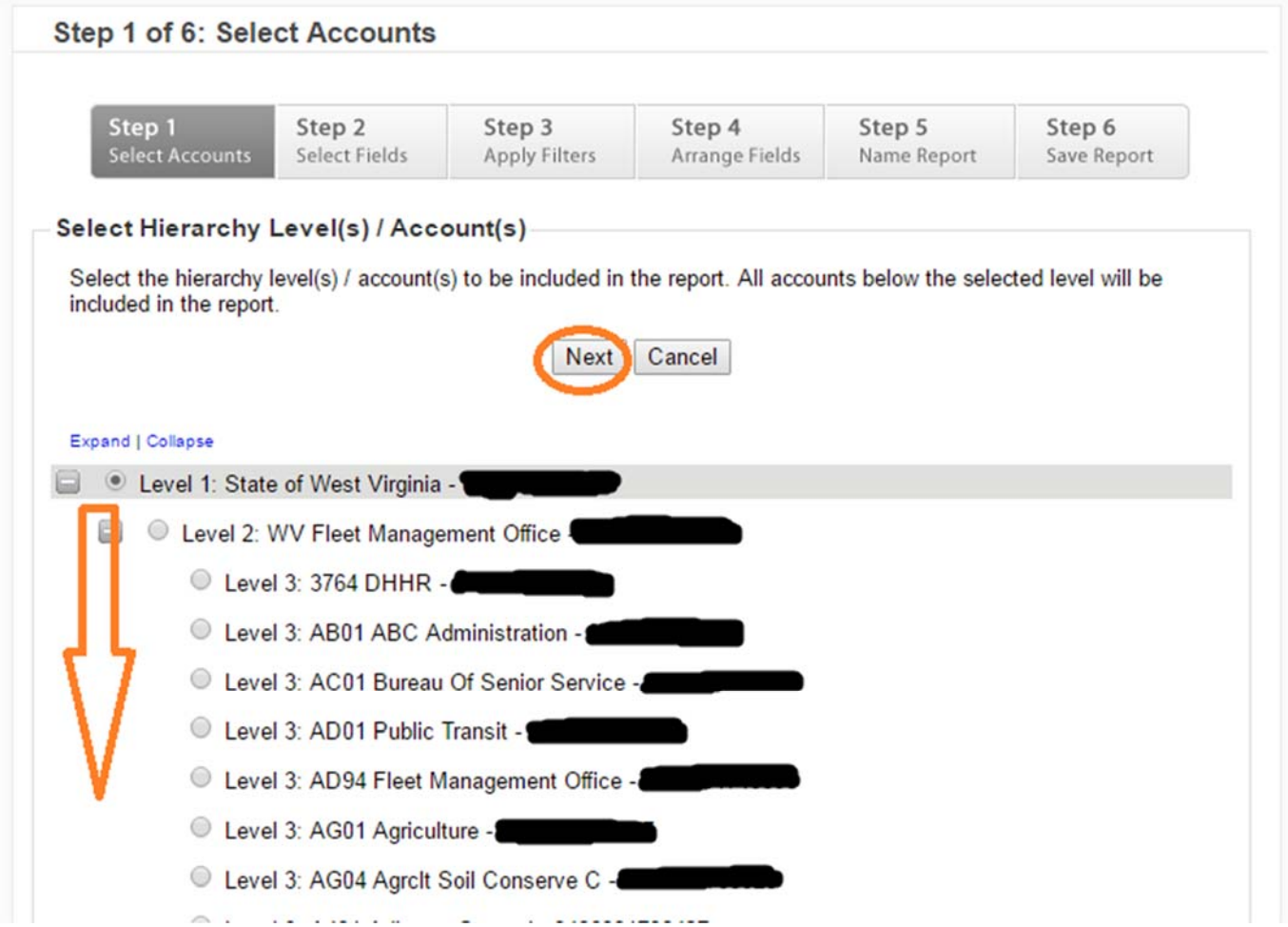
How to set up Authorization Declined Activity Report

This report allows you to look at declined data (card #, pin entered, declined coding) at the pumps for 3 day time periods, up to 14 days prior to the date you run the report. An example of this would be: today's date is 06-14-2016. You can look back as far as 06-01-2016, looking at 3 days at a time.

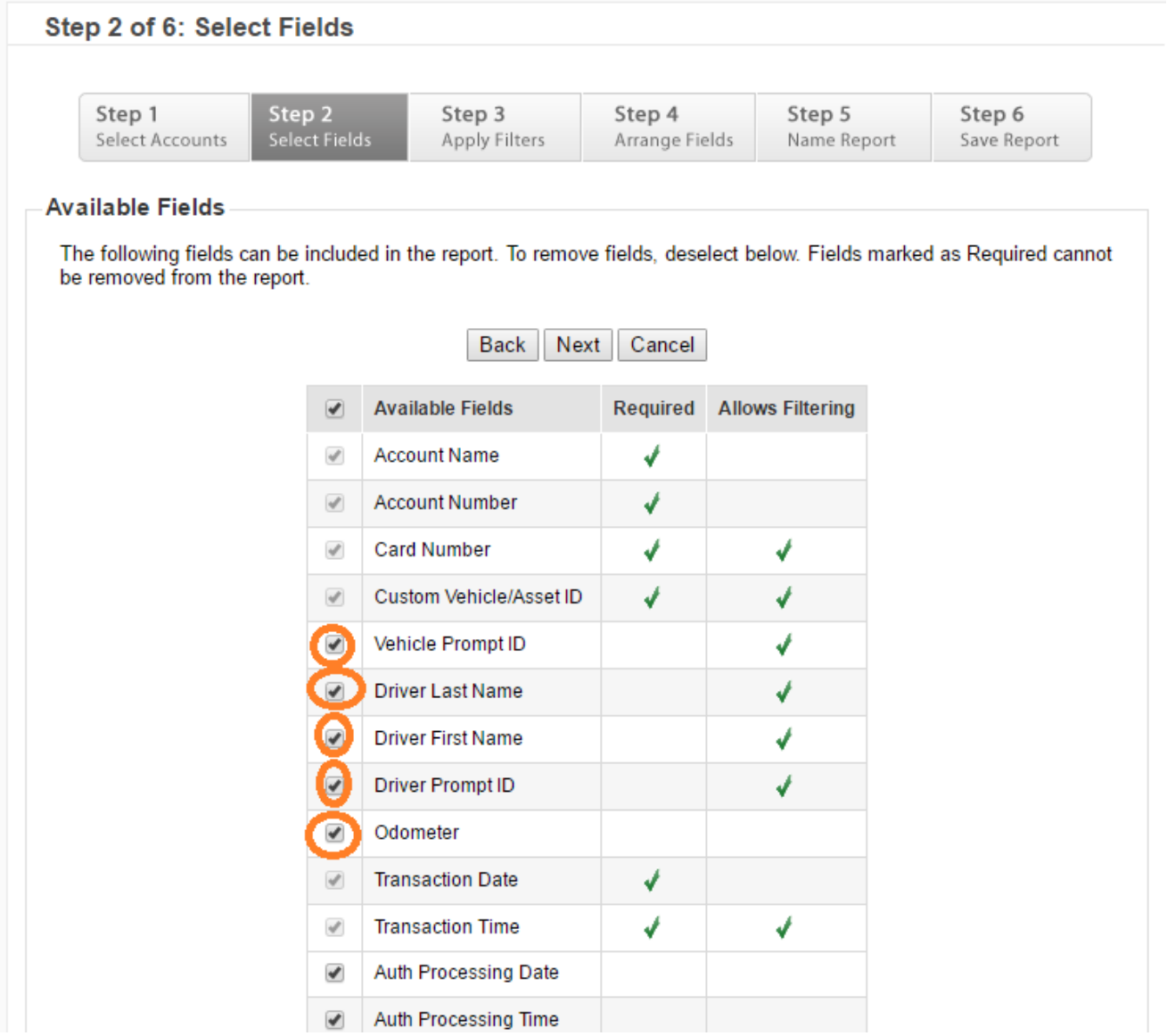
Under the Reports tab at the top of the WEX screen, click on My Custom Reports, then click on Create New Report. Select Authorization Activity Report. Once selected, you will go through 6 steps to create, save, and run the report.



Step 1 – Select your Hierarchy level (e.g. Level 3) or the accounts you supervise. Once selected, you can click “Next” at the top or scroll to the bottom and click “Next”.



Step 2 – Select the fields you would like to see in the report. **Note** Some fields are required fields and cannot be unchecked. Scroll down this page and make sure the Authorization Code and Authorization Code Description are checked. Once you have selected all the fields you would like to see in the report, click “Next” at either the top or scroll down to the bottom of the page and click “Next”.



Step 3 – This is the step where you can filter the report. If you want to only see Declined actions, scroll down to the Action Setting and select “Includes” in the drop down menu, and select “Decline” in the drop down menu beside that.

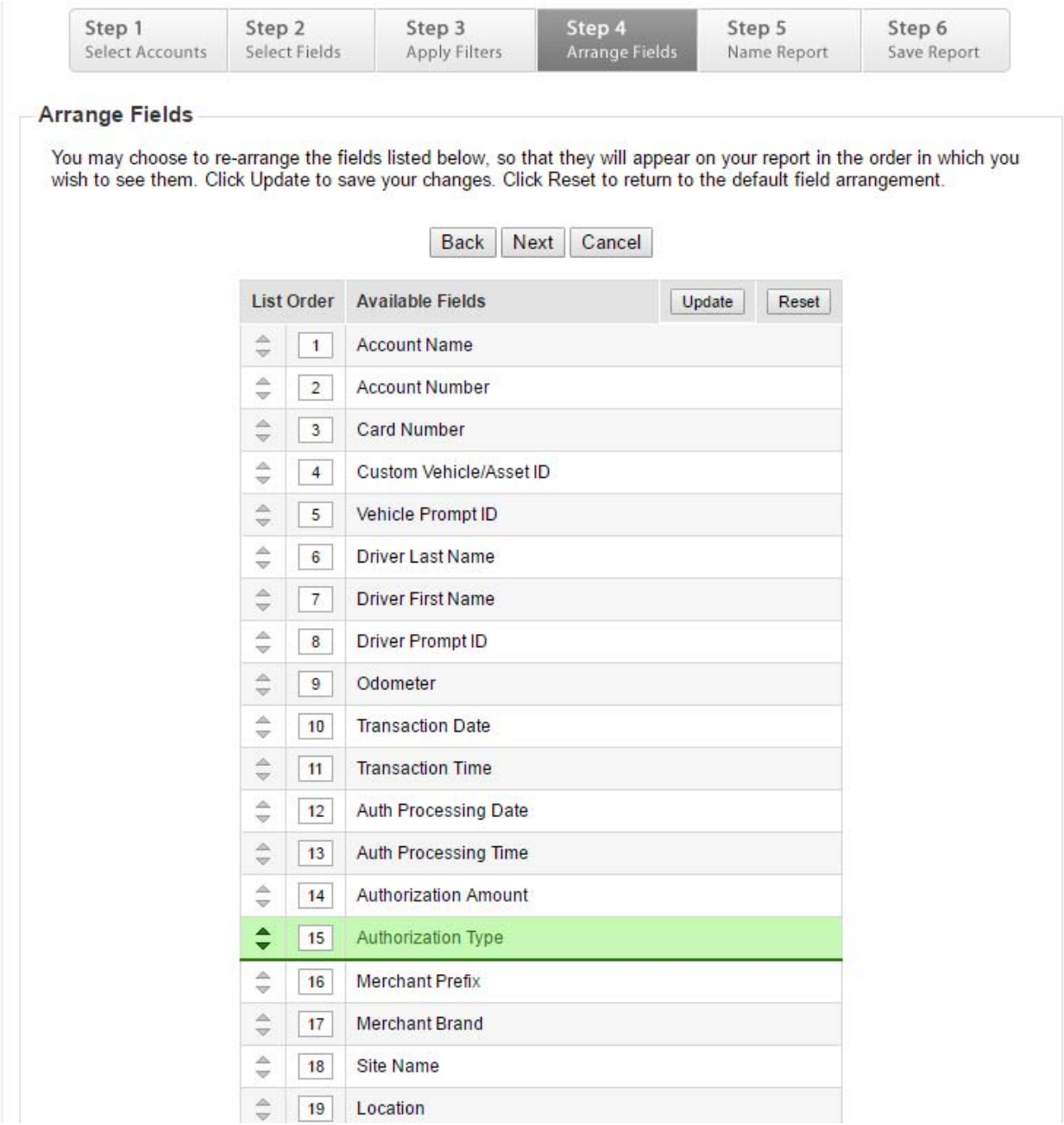
Available Filters

To limit your results, you may apply filters. When you run the report, you will have the opportunity to enter a date range.

Back | Next | Cancel

Filters	Conditions	Values
Card Number	--Select--	
Custom Vehicle/Asset ID	--Select--	
Vehicle Prompt ID	--Select--	
Driver Last Name	--Select--	
Driver First Name	--Select--	
Driver Prompt ID	--Select--	
Transaction Time	--Select--	
Authorization Amount	--Select--	
Authorization Type	--Select--	Pre-Auth Actual
Merchant Brand	--Select--	
Site Name	--Select--	
Location	--Select--	Inside Outside
Site City	--Select--	
Site State / Province	--Select--	**United States** Alabama Alaska
Site Postal Code	--Select--	
Action	Includes	Approval Decline
Action Code Description	--Select--	Approved Approved Approved - Emergency Manual Auth
Product	--Select--	Always Allowed Car Wash

Step 4 – This is where you can change the order of the fields. Put your cursor over the section you wish to move. It will highlight the section. Once it is highlighted, click on either the up or down arrows to change the position order of the field. In WEX to Excel, 1 = Column A; 2 = Column B; 3 = Column C; etc. When you are finished with the ordering you would like, click "Next" at the top or at the bottom of the page.



Step 5 – This is where you have to name the report. Keep in mind, the name is how this report will appear in "My Custom Reports" template page. You can also add a short description of what the report is for should you need a reminder. When finished, click "Next".

Step 6 – You can review the report settings that you selected. If you find something you wish to edit, you can click Back to go backwards in the steps. If you are satisfied with the settings, click either Save or Save and Run Now. The report is now set up.

If you clicked the "Save and Run Now" option, the report will launch. It will ask you to choose a start date and an ending date. Keep in mind that you can only choose 3 days at a time, and you can only go back 14 calendar days from the date that you run this report.

If this is a report you would like to have on a scheduled basis, you can set it from this step. For this particular report I would not recommend because the report can only run on 3 day increments at a time and can only look back in the transaction records up to 14 days prior (which includes the day that you run the report on).

Step 1 Select Accounts	Step 2 Select Fields	Step 3 Apply Filters	Step 4 Arrange Fields	Step 5 Name Report	Step 6 Save Report

Report Summary

This is your opportunity to review your report parameters and go back to make changes. You may **Save and Run Now,** or may choose to **Save** your template for future use. If this is a report you wish to receive on a regular basis, you may opt to **Schedule** it to run automatically on a timetable of your choice. You can access your saved templates via **View My Templates** under **My Custom Reports**.

Report Name: **test**
Description:
Selected Hierarchy Level(s)/Account(s): **Level 2: WV Fleet...** [redacted]

Fields and Filters

Back | Save and Run Now | Save | Schedule | Cancel

Field Name	Filter Condition & Value(s)
Account Name	N/A
Account Number	N/A
Card Number	Filter Not Applied
Custom Vehicle/Asset ID	Filter Not Applied
Vehicle Prompt ID	Filter Not Applied
Driver Last Name	Filter Not Applied
Driver First Name	Filter Not Applied
Driver Prompt ID	Filter Not Applied
Odometer	N/A
Transaction Date	N/A
Transaction Time	Filter Not Applied
Auth Processing Date	N/A
Auth Processing Time	N/A
Authorization Amount	Filter Not Applied
Authorization Type	Filter Not Applied
Merchant Prefix	N/A