MyCardUpdate User Guide

Triple E Technologies, LLC

Version 030316.02

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Comments, questions, or concerns? Please email all inquiries to helpdesk@e3tek.com

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Introduction

MyCardUpdate is a web based portal that syncs with DataManager and allows you to manage your customer accounts and proprietary cards as well as generate reports detailing customer balances and user activity. You can also create MyCardUpdate accounts for your employees and customers, enabling them to monitor drivers and private cards, change account permissions, and more, all from the convenience of their mobile devices.

- ✓ Manage customers from your mobile devices
- ✓ Create accounts for customers to let them manager their own private cards
- ✓ Change account permissions, card information and limits, and more
- ✓ Activate and deactivate private cards
- ✓ Generate customer card status reports
- ✓ Accept customer payments on rechargeable gift cards and prepaid fleet cards

Triple E Technologies, LLC (Triple E) has designed MyCardUpdate to run on any device with internet access, from desktop computers to smartphones. The changes you make automatically sync to DataManager, making MyCardUpdate a quick and convenient way to update your cards on the go or from the convenience of your home.

You must be running Triple E OneTouch Suite Version 4.52 or later and must install and activate AutoUpdater to properly use MyCardUpdate.

MyCardUpdate Browser Requirements

Desktop

- Internet Explorer 9 or higher
- Latest version of Firefox
- Latest version of Google Chrome
- Latest version of Safari running on latest version of Mac OS X

IOS

- Safari or 3rd party alternatives on IOS 9

Android

- Google Chrome for Android

Accessing MyCardUpdate

You can access MyCardUpdate by going to https://mycardupdate.com in your web browser, which displays the account login screen.

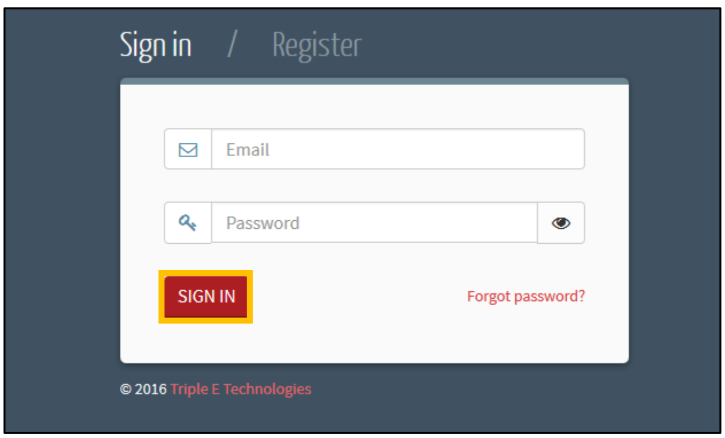
Logging In

Before you can access any of MyCardUpdate's features, you must first log in. If you are logging in for the first time, a temporary password will be sent to your email account and you will be prompted to change your password upon logging in.

MyCardUpdate accounts are connected to your email address and are pre-registered by Triple E. If you are unable to log in, contact Triple E support to ensure your email address is in the database or to request an account.

To log in to MyCardUpdate:

1. Go to https://mycardupdate.com. Login screen displays.



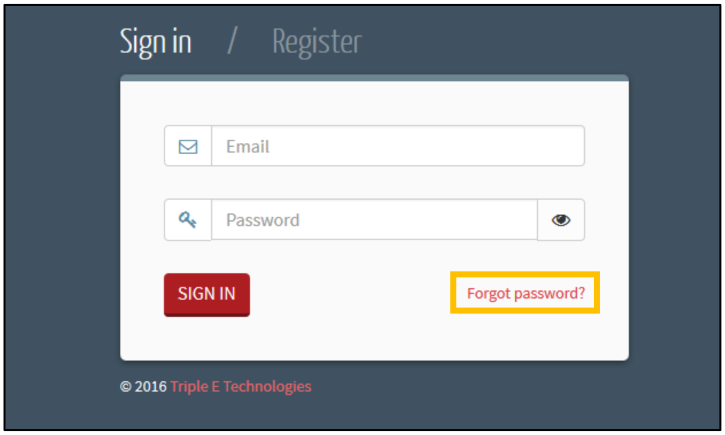
2. Enter your account email address and password, then click **Sign In**.

Retrieving Login Information

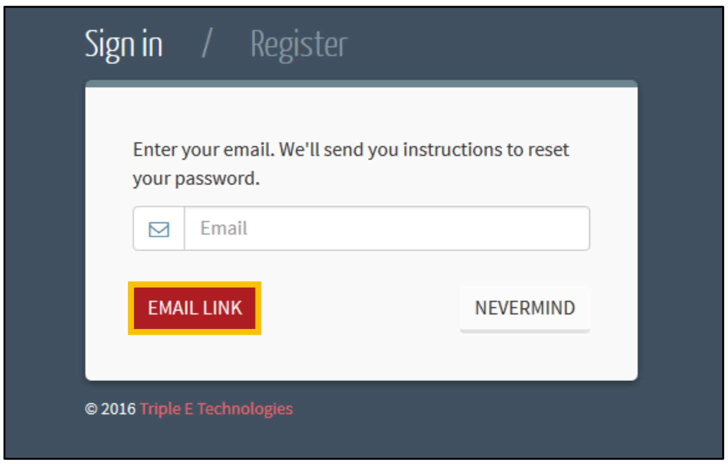
You can use MyCardUpdate's '**Forgot Password?'** feature to retrieve and/or reset your password. If you cannot remember your account email address, contact Triple E Support to retrieve it.

To retrieve password:

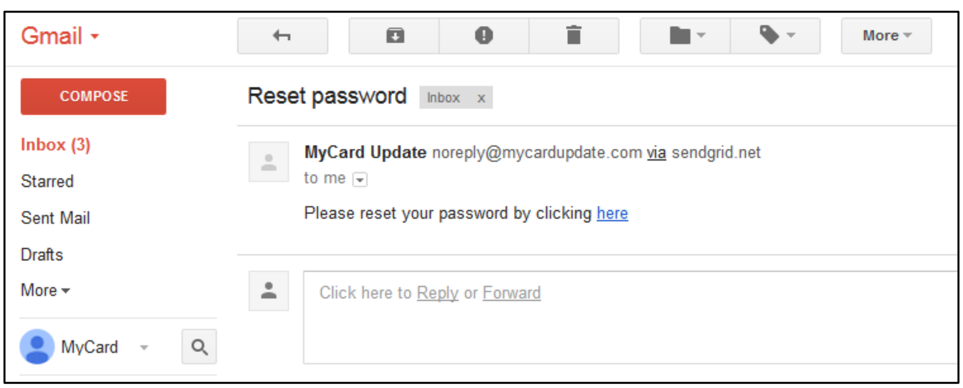
1. From the **Login** screen, click '**Forgot Password?**'. **Password Reset** screen displays.



2. In the **Email** field, enter your account email address, then click **Email Link**.



3. Log in to your email account and open the MyCardUpdate **Reset Password** email.



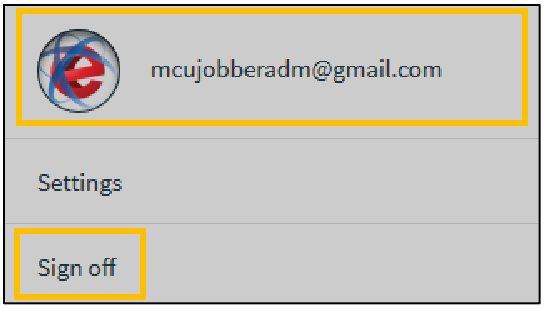
4. Follow the email instructions to reset your password.

Logging Out

When you are finished using MyCardUpdate, it is recommended to log out to protect your account information.

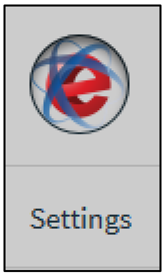
To log out:

1. Click your email address, located on the bottom-left side. Additional options display.



2. Click **Sign Off**.

Settings



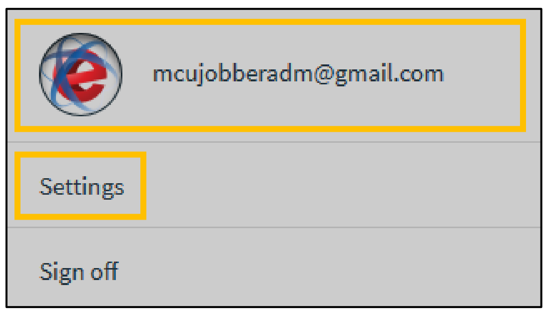
You can change your account settings, including your password, email address, and authentication configurations, at any time. You can access the **Settings** page by clicking the **Settings** tab located beneath your email address in the lower left corner of the MyCardUpdate screen.

The icon beside your email address is served from a third-party service called Gravatar. Gravatar allows you to associate an image with your email address, which can then be used on other sites. If you would like to create a Gravatar account for your email address, visit Gravatar's website for more information.

Access Settings

To access your settings:

1. Click your email address, located on the bottom-left side. Additional tabs display.

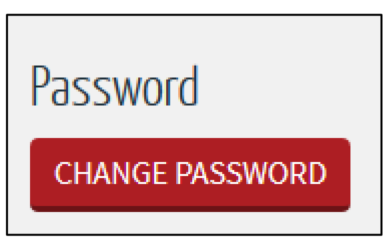


2. Click **Settings**.

Change Password

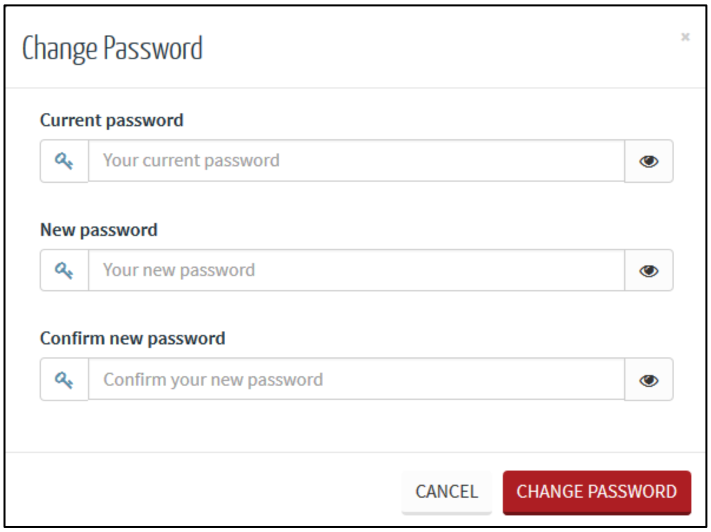
To change your password:

1. From the **Settings** page, in the **Password** section, click **Change Password**. **Change Password** screen displays.



2. If desired, click the eye icons  to display characters.
3. In the **Current Password** field, enter your current password.

4. In the **New Password** and **Confirm New Password** fields, enter new password in accordance with the following password requirements:
    - At least 8 characters
    - Include at least one of each of the following:
        - Uppercase letter (A, B, C…)
        - Lowercase letter (a, b, c…)
        - Number (0, 1, 2, 3, 4, 5, 6, 7, 8, 9)
        - Special character (` ~ ! @ # $ % ^ & * ( ) _ + - = { } | [ ] \ : " ; ' < > ? , . /)

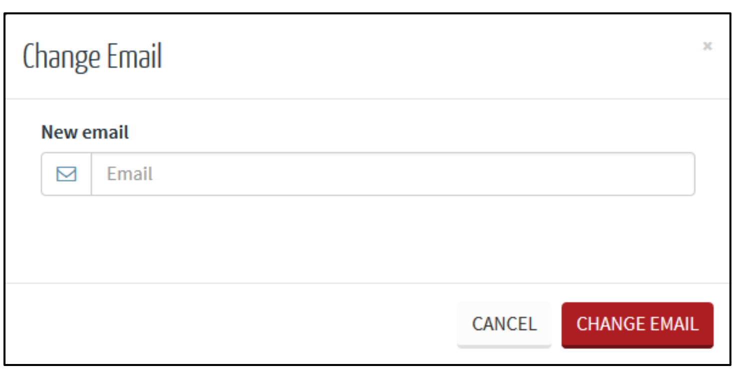


5. Click **Change Password**.

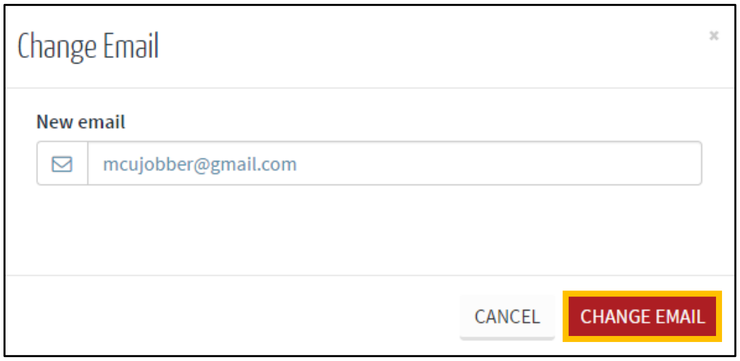
Change Email

To change your account email address:

1. From the **Settings** page, in the **Email Address** section, click **Change Email**. **Change Email** screen displays.



2. In the **New Email** field, enter new email address, then click **Change Email**.



Two-Factor Authentication

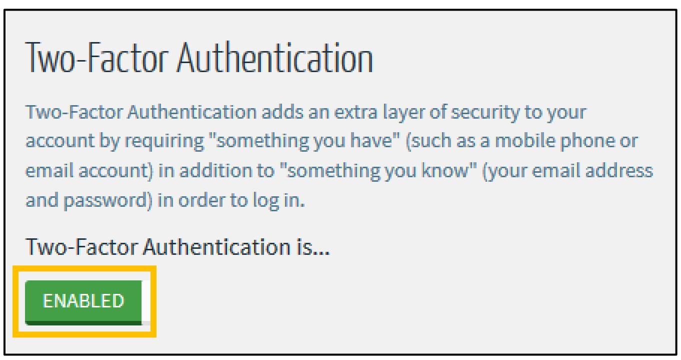
Two-factor authentication adds an extra layer of security to your account by requiring “something you have” (such as a mobile phone or email account) in addition to “something you know” (such as your email address and password) in order to log in. If you enable two-factor authentication, you will be prompted to provide a security code after logging in.

You can allow MyCardUpdate to remember your browser, enabling you to bypass the security code for all subsequent login attempts. Only use this option on trusted devices to help protect your account.

Two-factor authentication is disabled by default, meaning you will only need your email address and password to log in. You can enable and disable it at any time from the **Settings** page.

To set up two-factor authentication:

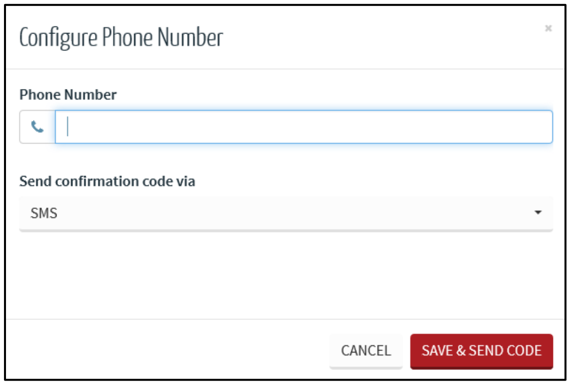
- From the **Settings** page, in the **Two-Factor Authentication** section, click the button to switch from **Disabled** to **Enabled**.



Phone Authentication

To configure phone authentication:

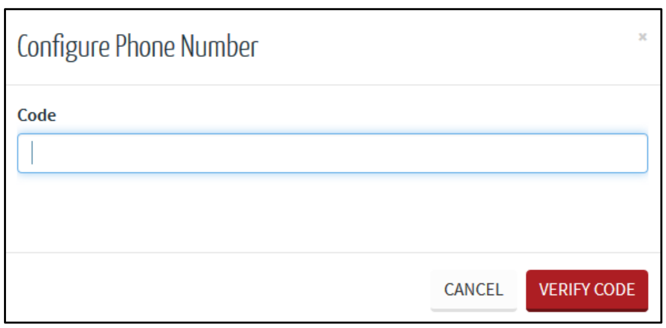
1. Click **Add Phone Number.**



2. In the **Phone Number** field, enter phone number.
3. In the **Send Confirmation Code Via** dropdown menu, select one of the following:

SMS	Receive code via automated text message. Charges may apply, depending on your carrier and plan.
Voice	Receive code via automated text to speech phone call.

4. Click **Save & Send Code** to send confirmation code to entered phone number. **Configure Phone Number** screen displays.

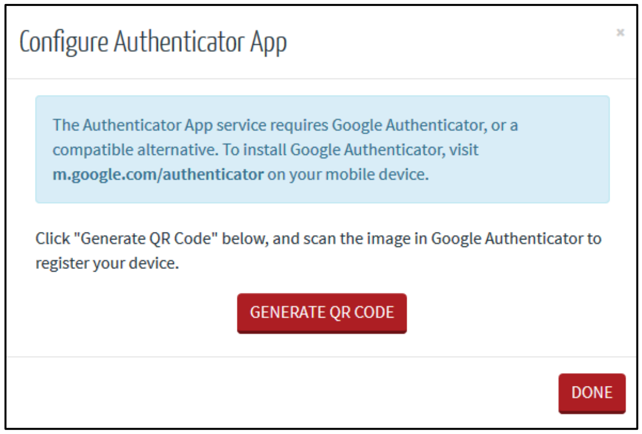


5. In the **Code** field, enter the confirmation code, then click **Verify Code**.
6. In the **Send codes to my…** dropdown menu, select **Phone**.

Authenticator App

To configure Authenticator App:

1. Download and install **Google Authenticator** on your mobile device.
2. In the MyCardUpdate **Settings** page, click **Configure Authenticator App**. **Configure Authenticator App** screen displays.



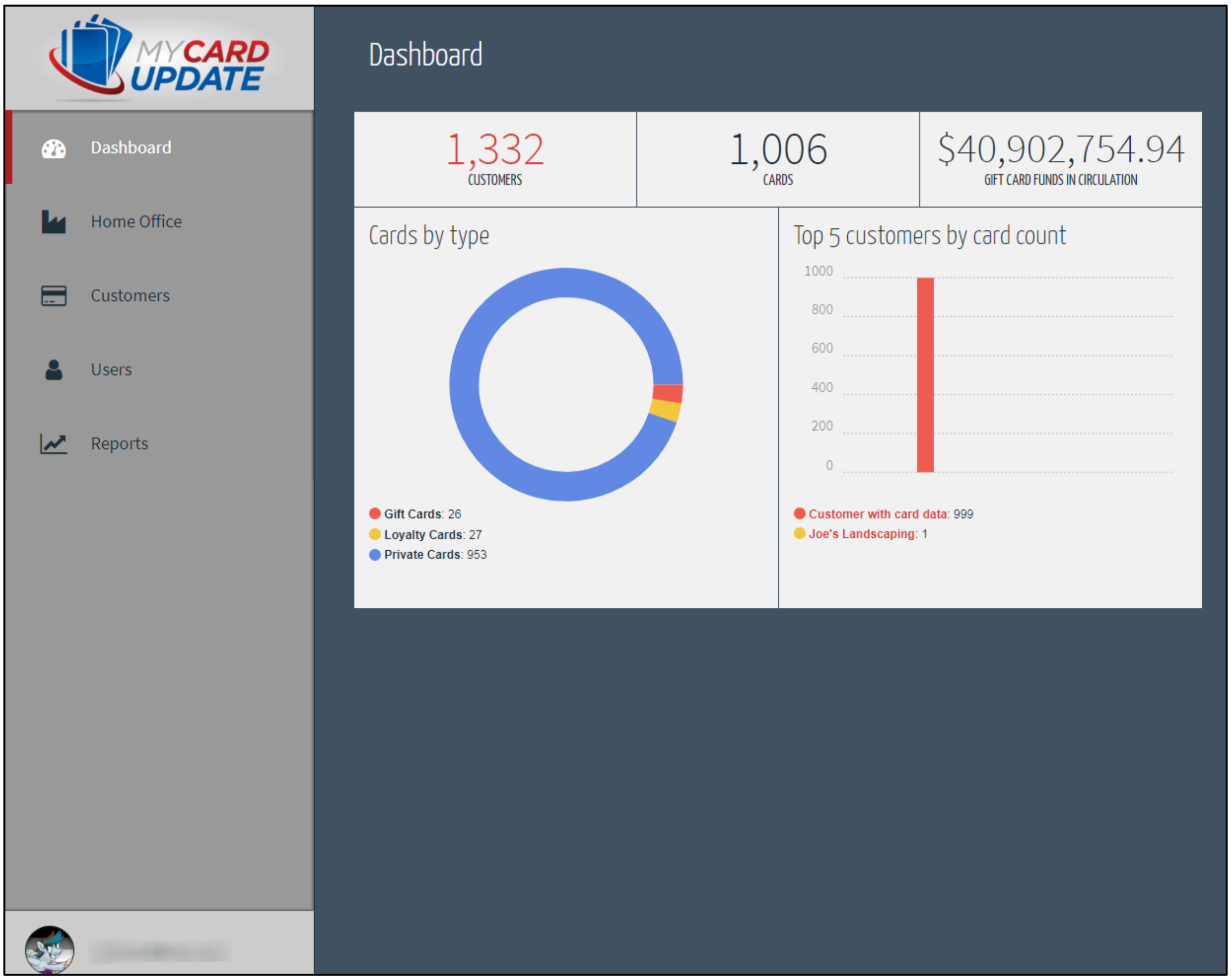
3. Click **Generate QR code**. QR code displays.

4. Using **Google Authenticator**, scan the QR code, then click **Done** on MyCardUpdate screen.
5. In the **Send codes to my…** dropdown menu, select **Authenticator App**.

Dashboard

The first screen you will see upon logging in to MyCardUpdate is the **Dashboard**. The Dashboard gives you a high-level overview of private cards, credit limits, and stored-value gift cards in circulation.

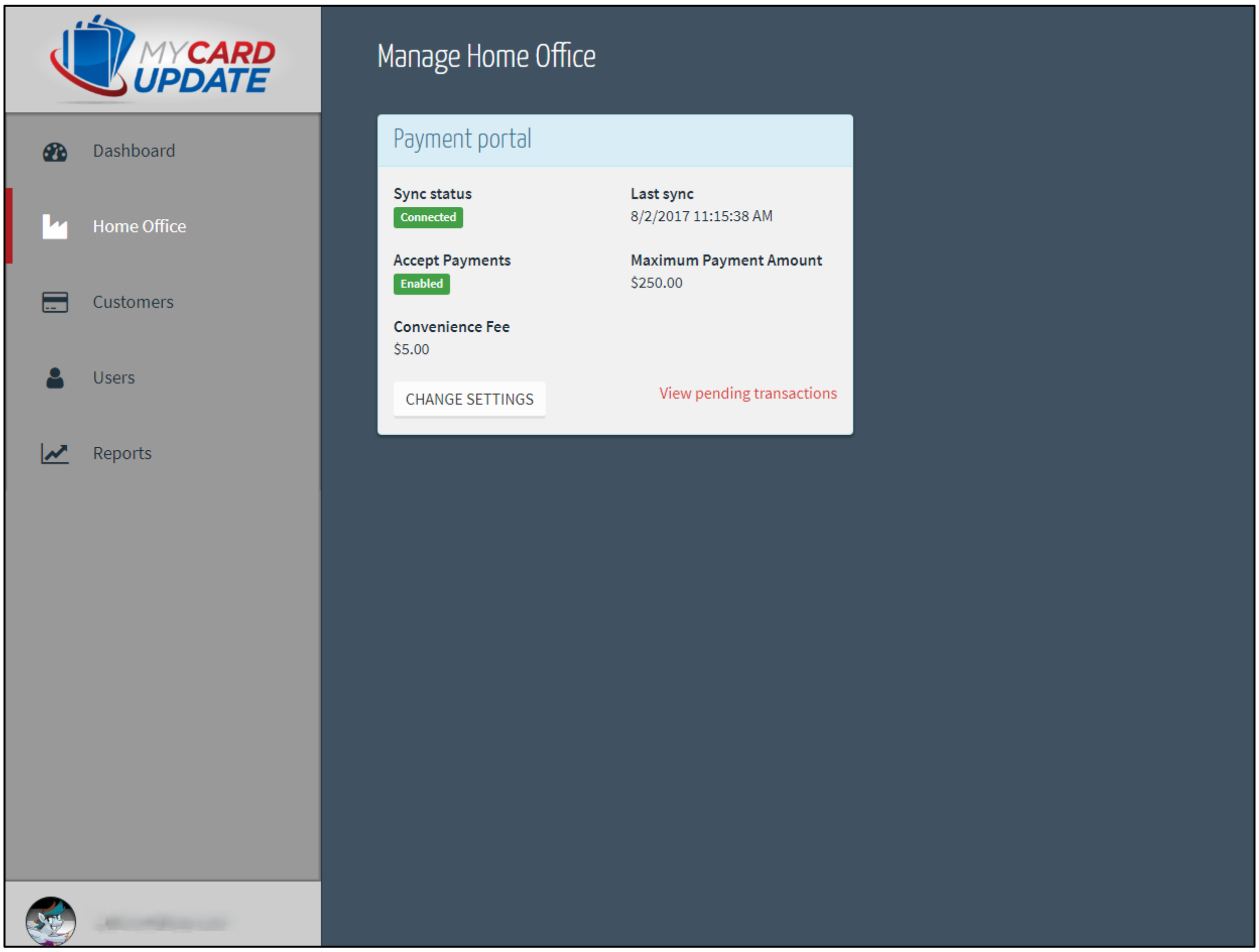
If you have the DataManager AR Suite, your dashboard may display more information than pictured below, such as the total amount of customer credit lines, outstanding total customer balance, and top customers by balance.



Home Office

The **Home Office** tab allows you to manage your payment portal options. MyCardUpdate can be linked with a **Stripe** account, which allows you to accept payments from your customers on rechargeable gift cards and prepaid fleet cards. Once payments are enabled, you can limit the maximum payment amount and set a convenience fee to be charged on every transaction.

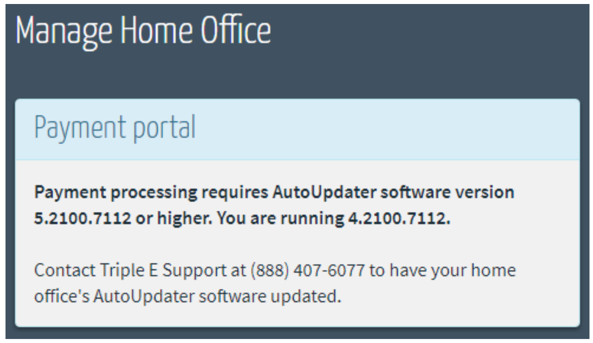
Note: To learn more about how **Stripe** handles your payment information, click here.



Enabling Payments

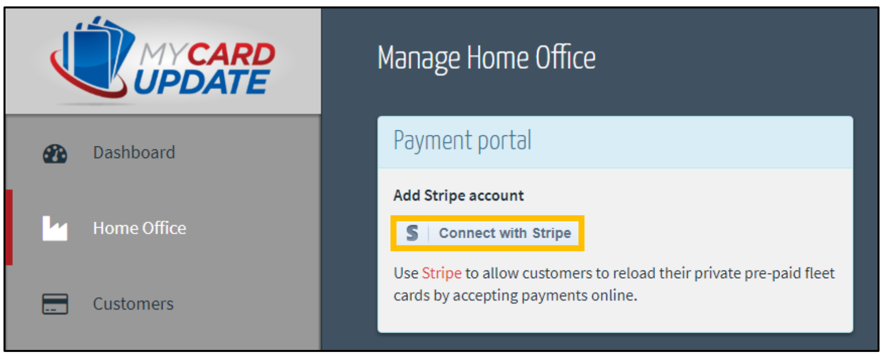
When you first click on the **Home Office** tab, the only available option will be to set up a Stripe account. You can only accept payments if you have an active Stripe account linked to MyCardUpdate.

Note: MyCardUpdate will automatically check the version of AutoUpdater that your system is running when you attempt to create a Stripe account. If your system is not running the minimum version required to sync balances, you will need to upgrade it in order to complete the Stripe setup process.

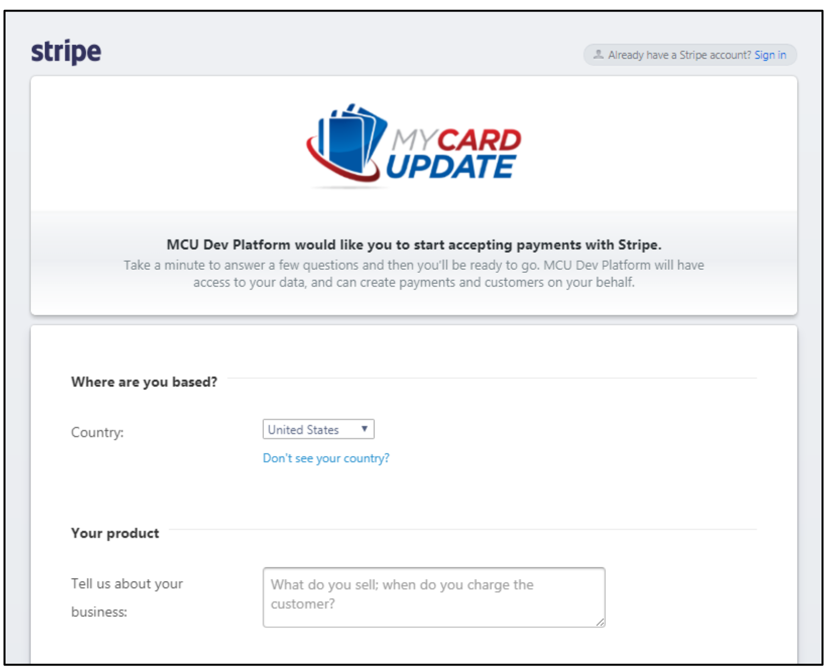


To set up your Stripe account:

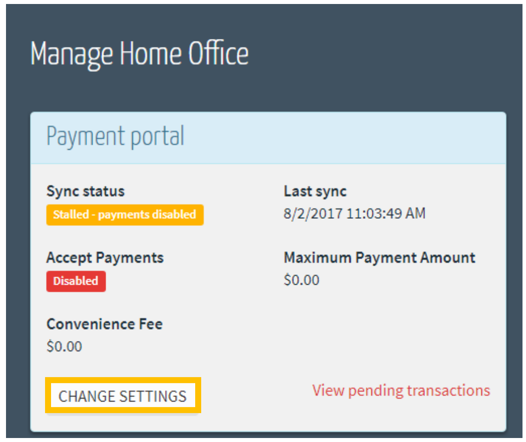
1. From the **Home Office** tab, click the **Connect with Stripe** button. You will be directed to the Stripe signup page.



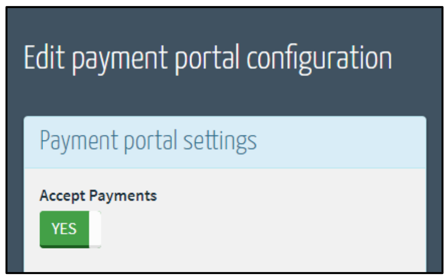
2. Complete the Stripe account creation form. Upon successfully submitting your information, you will be redirected back to the MyCardUpdate **Manage Home Office** page.



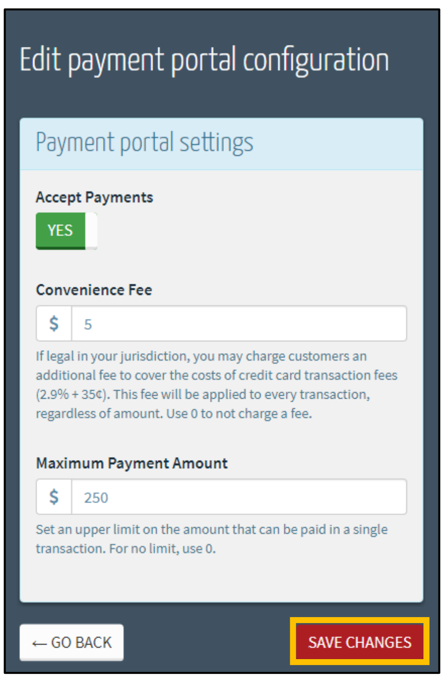
3. From the **Manage Home Office** page, click the **Change Settings** button.

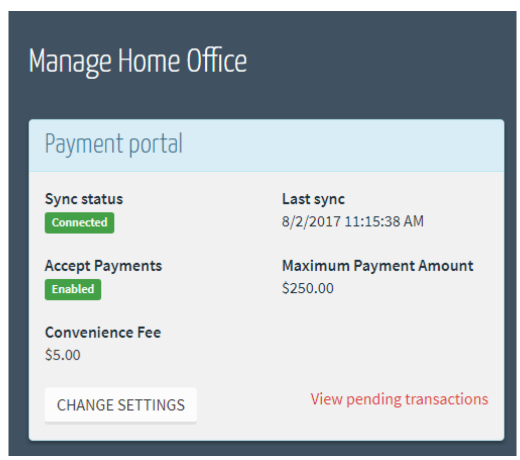


4. In the **Payment portal settings** section, click the **Accept Payments** slider so that **Yes** displays.



5. If desired, enter a **Convenience Fee** and/or a **Maximum Payment Amount.**
6. Click **Save Changes.** Your new configurations will display on the **Manage Home Office** page.





Convenience Fees

In MyCardUpdate, you can set a convenience fee to help you offset the costs of processing credit card transactions. The convenience fees on MyCardUpdate are universal, meaning that the amount you enter will be applied to all MyCardUpdate transactions, regardless of total. For example, if you set a $5 convenience fee, customers will be charged $5 on both a $10 transaction and a $100 transaction.

It is recommended that you calculate a convenience fee based on the average reload amount for your site.

Note: Before setting a convenience fee, verify whether or not it is legal in your jurisdiction to charge additional fees on credit card transactions.

Maximum Payment Amount

You can set a maximum payment amount to limit the amount that can be paid in a single transaction. This feature can be used to help offset costs incurred from credit card processing fees on large transactions. Without a maximum payment limit, customers may be able to make large payments while still receiving a low convenience fee.

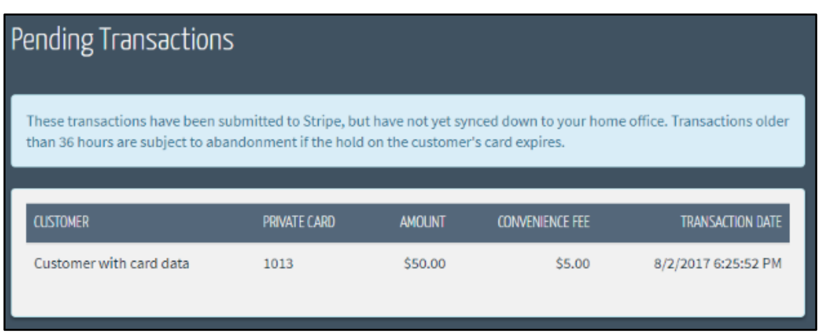
Sync Status

Once you've configured your Stripe account, you will be able to check your site's payment sync status, which indicates whether or not your home office has connected with AutoUpdater recently. MyCardUpdate is designed to help prevent transactions from getting stuck in pending authorization and will automatically disable payments if no recent sync is detected. Depending on how frequently your site is set to sync, different status icons will display:

Connected	Site has synced with AutoUpdater within the last 5 minutes. Payments will be accepted.
Stalled - payments disabled	Site has not synced with AutoUpdater for 5-60 minutes. Payments will be disabled until the next sync is detected.
Disconnected - payments disabled	Site has not synced with AutoUpdater for over 1 hour. Payments will be disabled until the next sync is detected. It is recommended that you check your sync configuration and set it to a lower interval to accept payments without interruption.

Pending Transactions

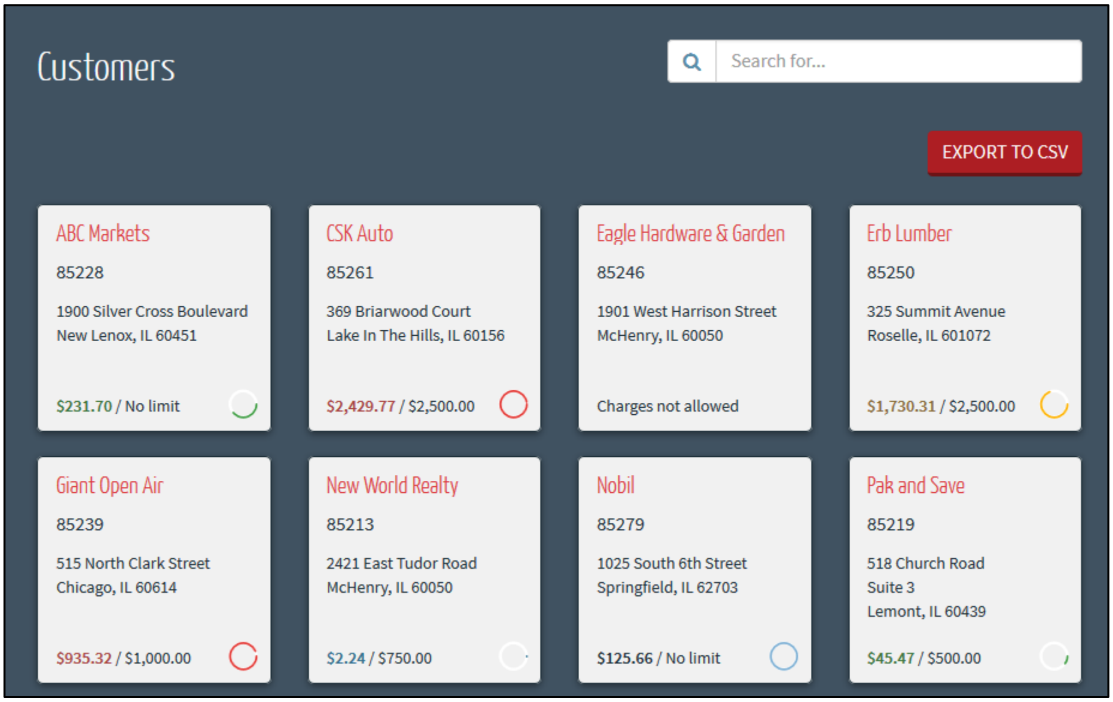
Click **View pending transactions** from the **Home Office** tab to review all transactions that haven't been processed yet. Transactions will be placed in this state if your site is not set to regularly sync to AutoUpdater. Transactions that have not been synced for more than 36 hours are subject to abandonment.



Customers

The **Customers** tab allows you to view and search for all customers attached to your account. Each customer tile displays a quick account summary, including account number, address, and a current credit balance. Click on any of the customer tiles to view more detailed information and make changes.

You can use the search bar located at the top-right of the screen to quickly search for customers.

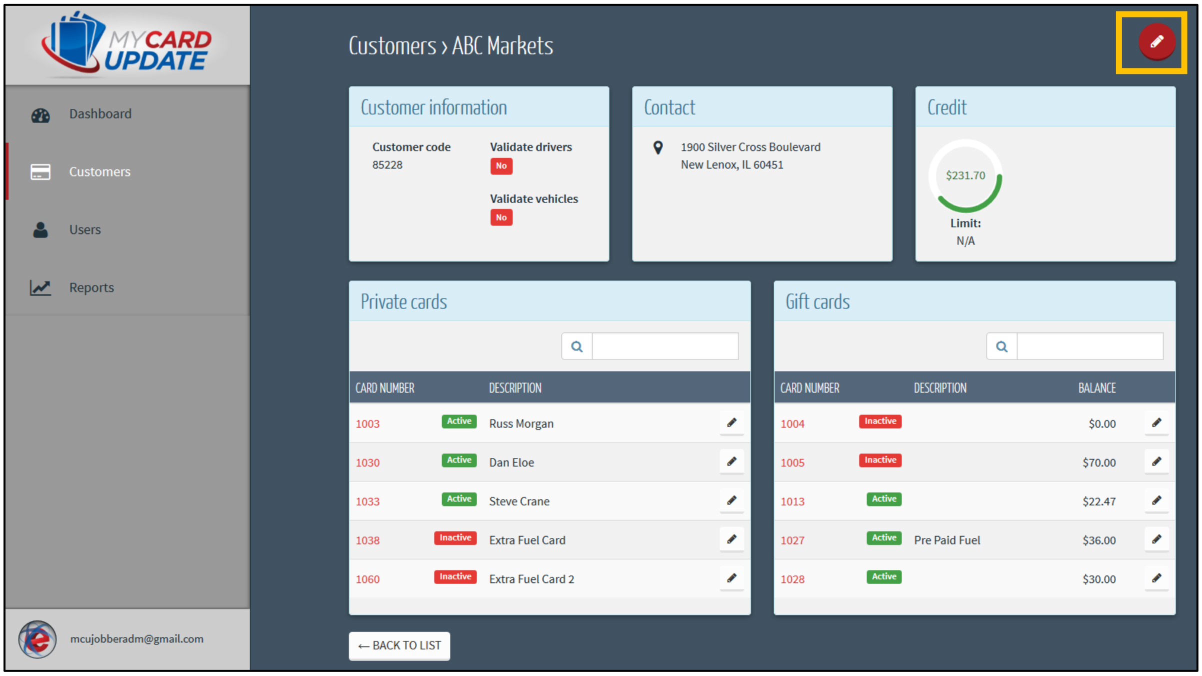


Editing Customers

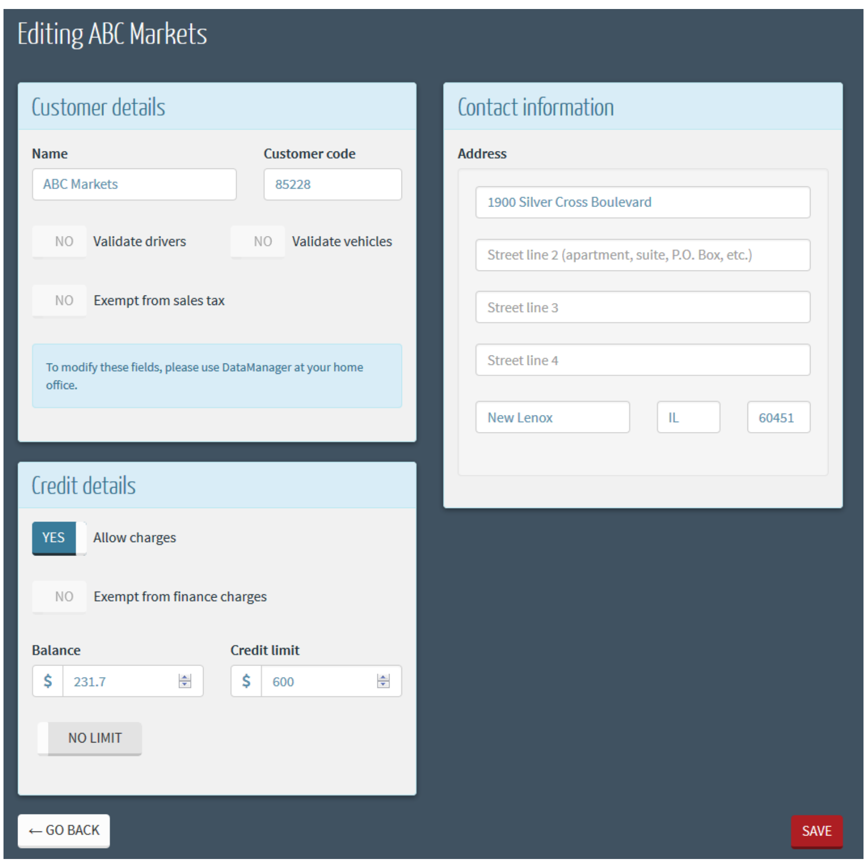
Clicking on a customer tile displays their basic information, contact address, credit balance and limit, private cards, and gift cards. You can click on a customer's cards to edit card settings and basic information. All changes will automatically sync with your DataManager database.

To edit customers:

1. From the **Customers** tab, click a customer tile. **Customer** screen displays.

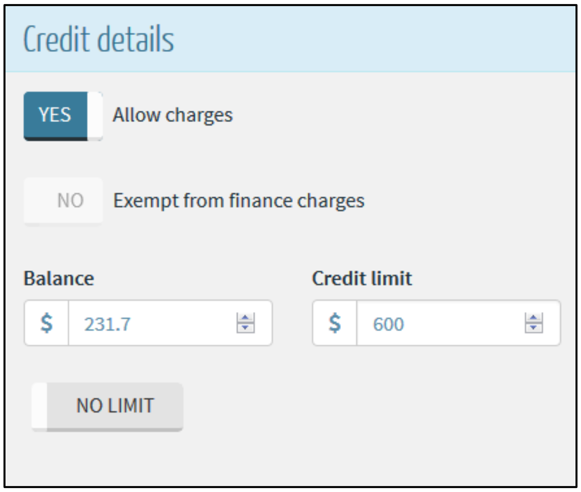


2. Click the pencil icon  at screen top-right. **Editing Customer** screen displays.

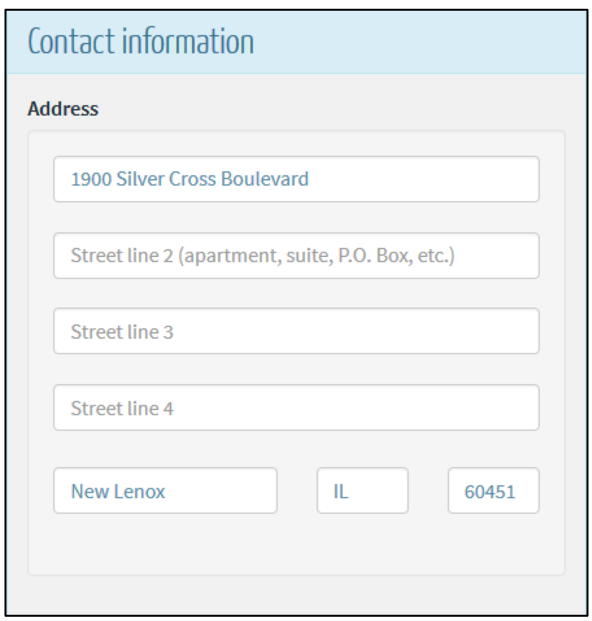


3. In the **Credit Details** section, change the following, as desired:

Allows Charges	Select **Yes** to allow credit charges or **No** to disallow credit charges.
Credit Limit	Account credit charge limit in dollars. Only applies if **Apply Limit** is selected.
No Limit/Apply Limit	Select **No Limit** to allow unlimited charges, or **Apply Limit** to enforce **Credit Limit** amount.



4. In the **Contact Information** section, change the account address, if desired.



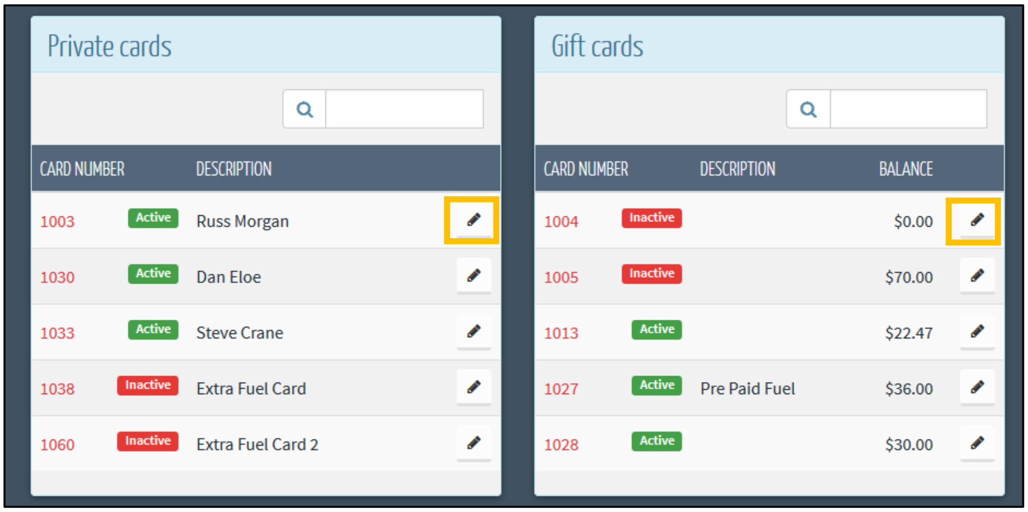
5. Click **Save**.

Editing Customer Cards

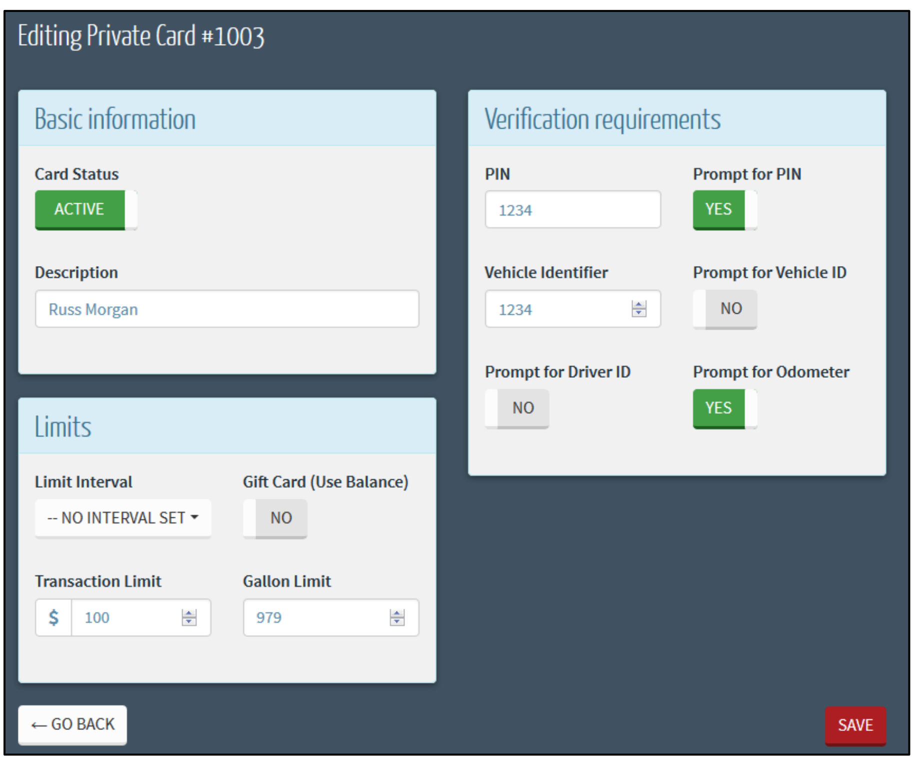
In addition to editing a customer's basic information, you can also edit each of their active and inactive cards. You can edit the card status, description, limit intervals and values, and prompts.

To edit customer cards:

1. From the **Customers** tab, select a customer. **Customer** screen displays.

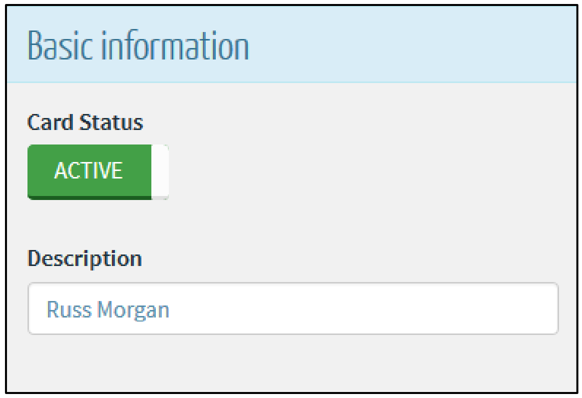


2. Click on the pencil icon  for a card number in the **Private Cards** or **Gift Cards** sections. **Editing Private Card** screen displays.



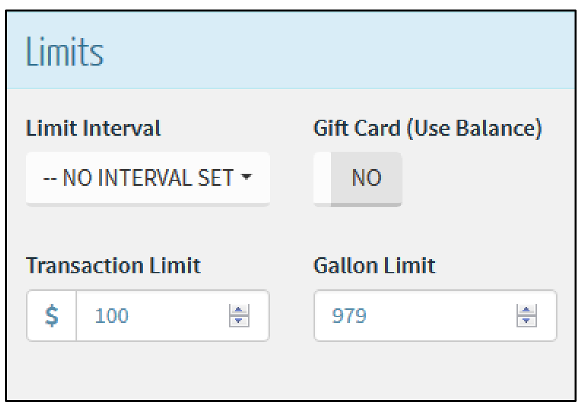
3. In the **Basic Information** section, change the following, as applicable:

Card Status	**Active** to enable card, or **Inactive** to disable card.
Description	Unique card description, such as cardholder name.



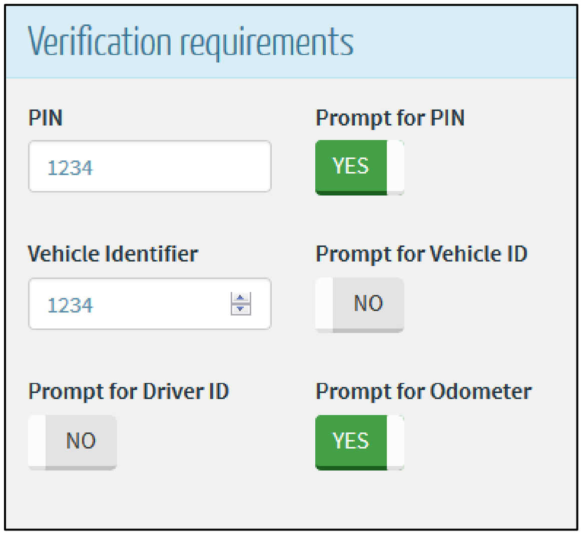
4. In the **Limits** section, change the following, as applicable:

Limit Interval	Period for which **Transaction Limit** value applies (e.g., 'Transaction', 'Daily', 'Weekly', 'Monthly', etc.).
Gift Card (Use Balance)	**Yes** to convert card into gift card, or **No** to make card a charge card.
Transaction Limit	Maximum dollar amount allowed per **Limit Interval** specified.
Gallon Limit	Maximum fuel gallons allowed per **Limit Interval** specified.



5. In the **Verifications requirements** section, change the following, as applicable:

PIN	Cardholder **P**ersonal **I**dentification **N**umber.
Prompt for PIN	Cardholder must enter Personal Identification Number to use card.
Vehicle Identifier	Unique number identifying vehicle.
Prompt for Vehicle ID	Cardholder must enter Vehicle ID to use card.
Prompt for Driver ID	Cardholder must enter Driver ID to use card.
Prompt for Odometer	Cardholder must enter odometer reading to use card.



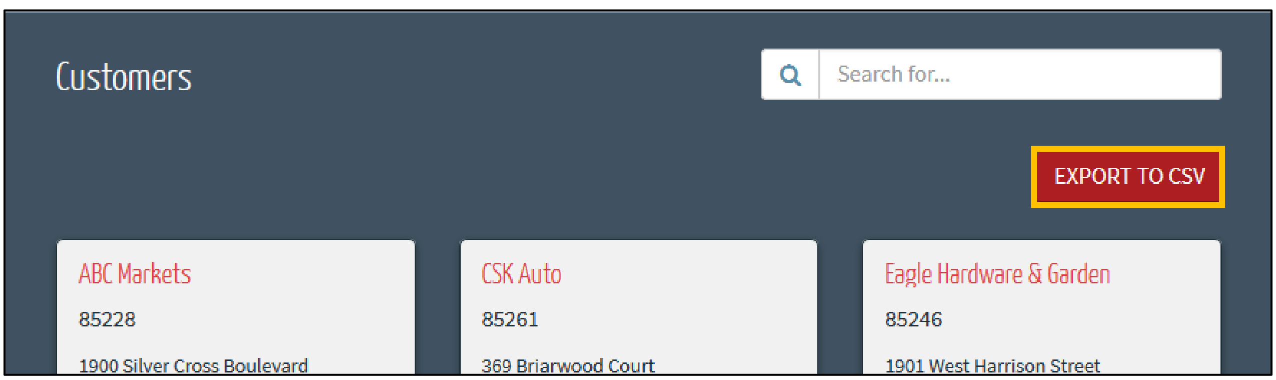
6. Click **Save**.

Exporting Customers

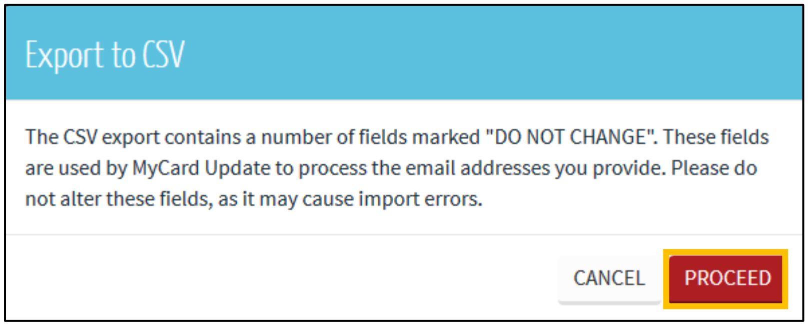
You can export all your customers to a CSV file, which you can then use to quickly create user accounts for all the included customers. The CSV file lists all your customers alphabetically and allows you to enter account email addresses for each of them from one location. For instructions on importing your customers and creating their user accounts, see the Importing Users section.

To export customers:

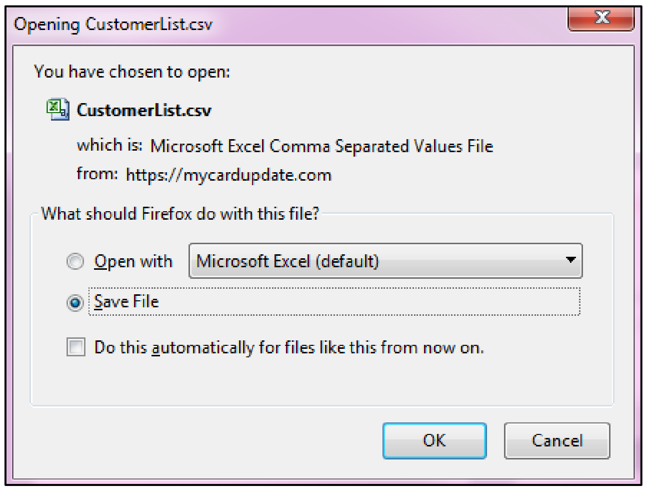
1. From the **Customers** tab, click **Export To CSV**. **Export to CSV** screen displays.



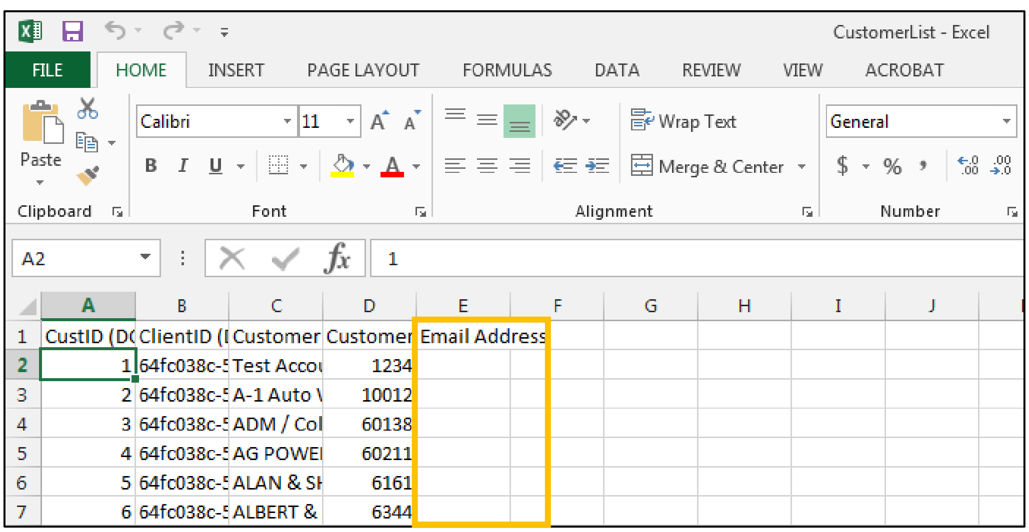
2. Click **Proceed**. **Download** screen displays after several seconds.



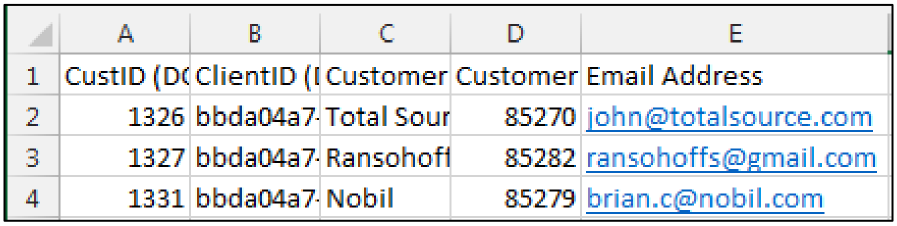
3. Select **Save File**, then click **OK**.



4. Open **CustomerList.csv**.



5. If desired, edit or delete customers.
6. In the **Email Address** column, add an email address for each customer. The email address will be used as the customer's login.



	A	B	C	D	E
1	CustID (DC	ClientID (I	Customer	Customer	Email Address
2	1326	bbda04a7-	Total Sour	85270	john@totalsource.com
3	1327	bbda04a7-	Ransohoff	85282	ransohoffs@gmail.com
4	1331	bbda04a7-	Nobil	85279	brian.c@nobil.com

7. Click **File**, then click **Save** to save changes.

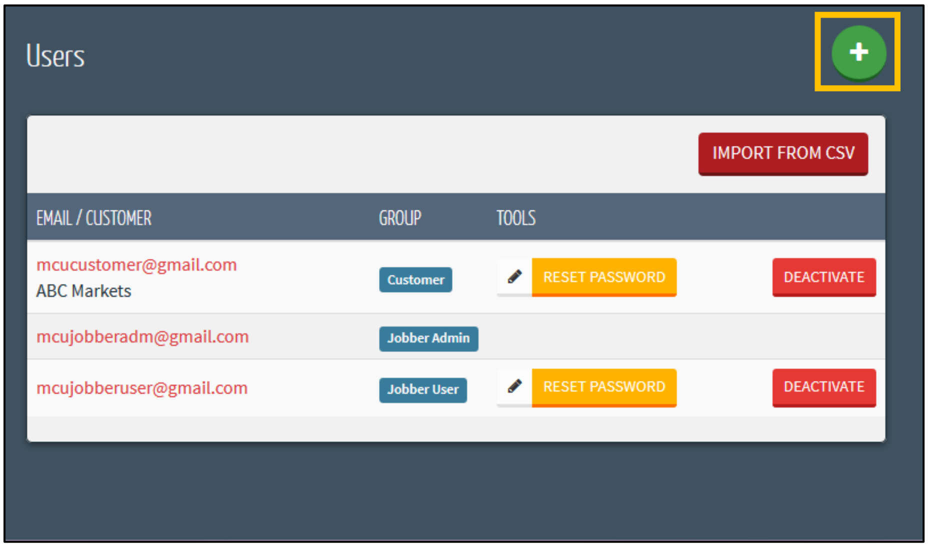
Users

The **Users** tab allows you to manage MyCardUpdate users' activation statuses, login information, and passwords, and it can also be used to add new user accounts.

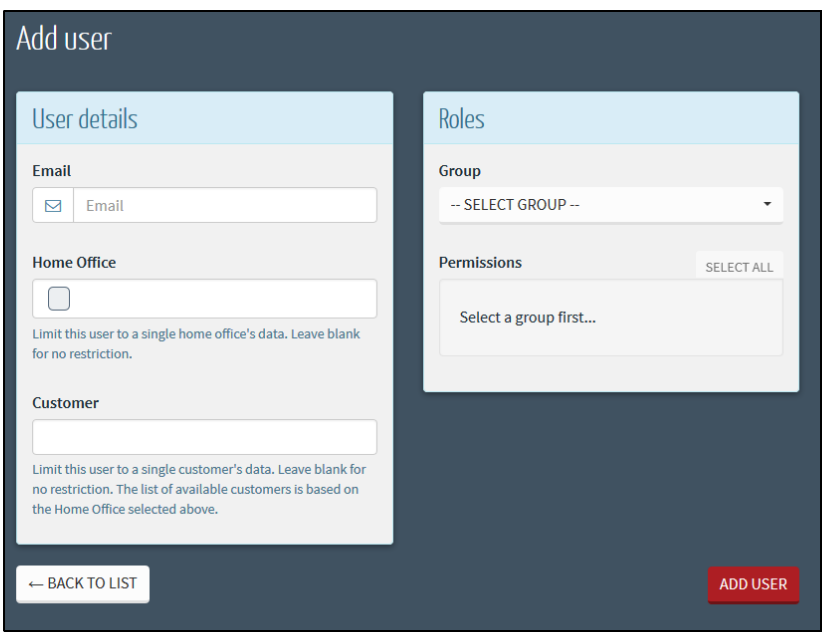
Adding New Users

You add a new user in two ways: by manually adding one customer at a time, or by mass importing user information with the **Import From CSV** function.

To add a user (manually):



1. Click the green plus icon  at screen top-right. **Add User** screen displays.



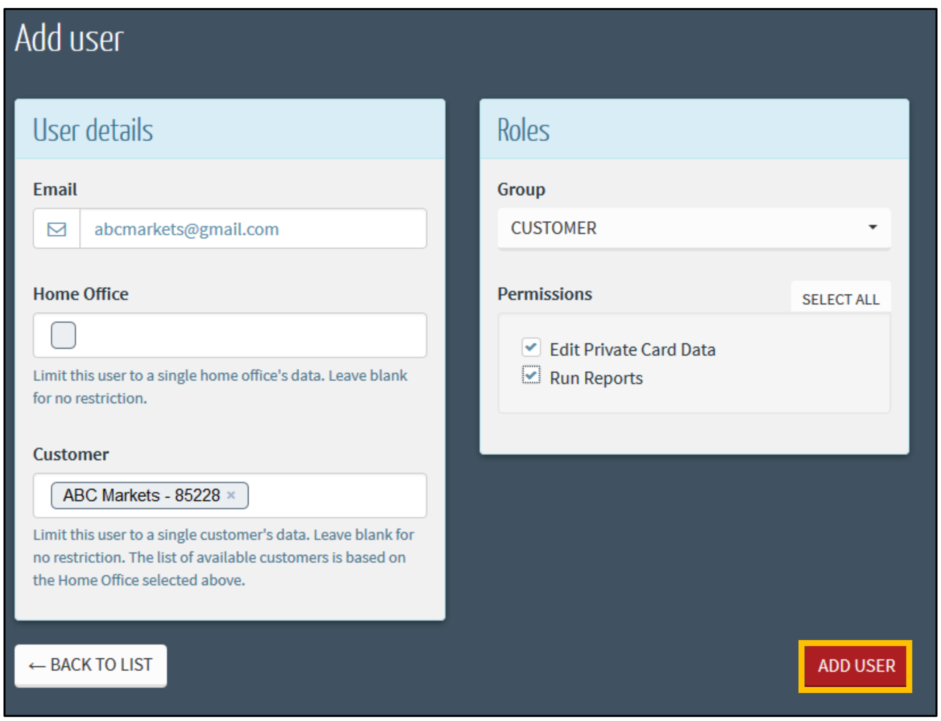
2. In the **Email** field, enter an account email address.
3. In the **Customer** field, type and select a customer, or leave blank for no restriction.
4. Select one of the following from the **Group** dropdown menu:

Jobber User	Can be given permission to edit all customer and card information and to run reports
Customer	Can be given permission to edit their own cards and run reports

5. For **Jobber Users**, check or uncheck the following permissions:
    - Create/edit customer logins
    - Edit customer data
    - Edit customer credit
    - Edit private card data
    - Edit private card credit
    - Run reports

6. For **Customers**, check or uncheck the following permissions:
    - Edit private card data
    - Run reports

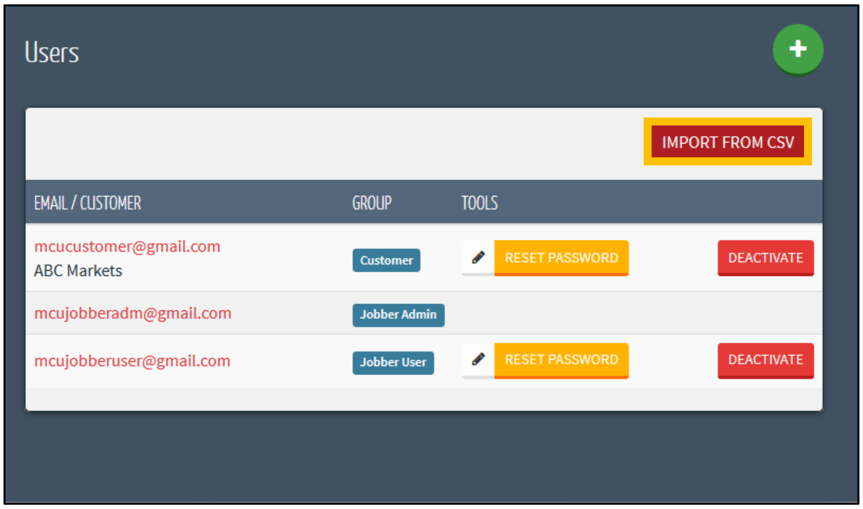
7. Click **Add User**.



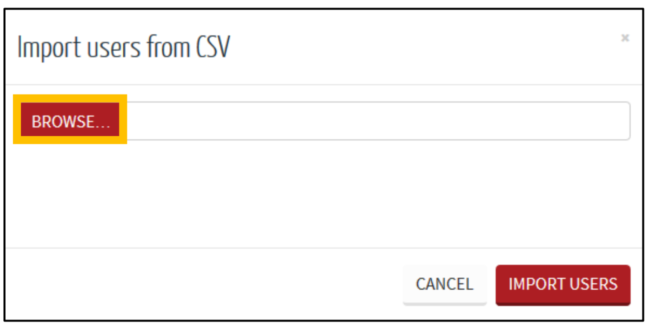
Importing Users

If you exported your customers into a CSV file from the **Customers** tab, you can import the file to quickly register user accounts for all listed customers. The users will not display on your **Users** tab until they submit their emails in the login registration form. Once they have created accounts, you can navigate to the **Users** tab to change their account information and permissions, if desired.

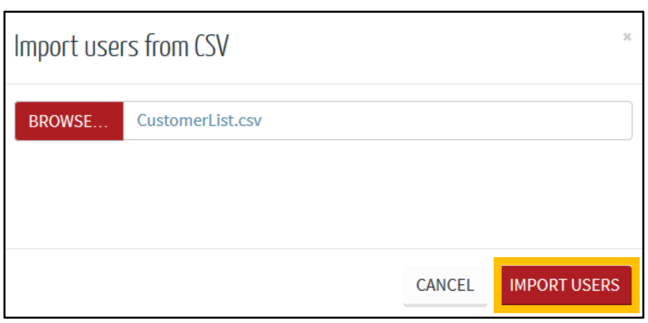
To import users from CSV:



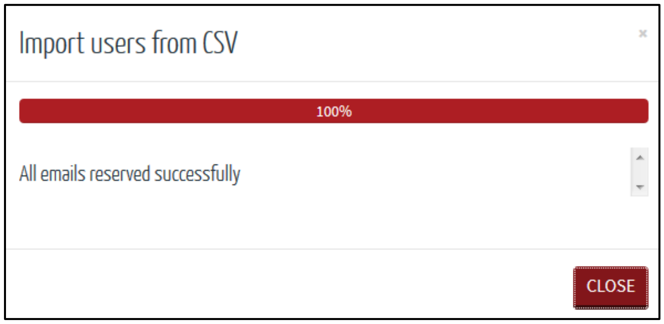
1. From the **Users** tab, click **Import From CSV**. **Import Users** screen displays.



2. Click **Browse**, then select the appropriate CSV file.



3. Click **Import Users**. Success screen displays.



4. Click **Close**.

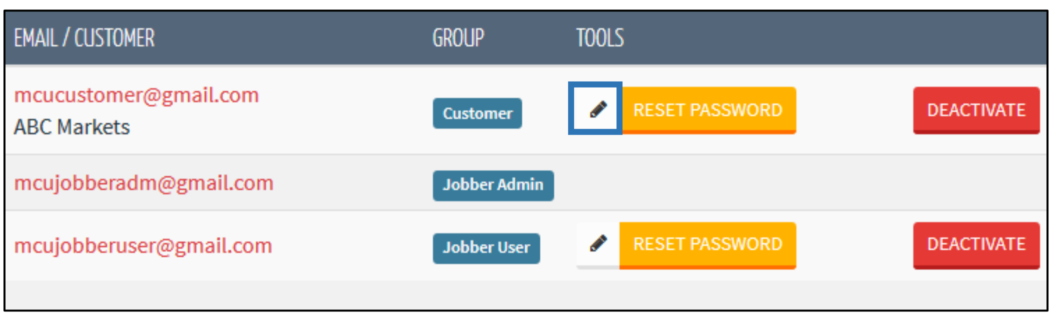
Reset Password

As a Jobber Admin level user, you can reset passwords for other accounts. This feature functions the same way as the **Forgot Password** button on the login screen – it automatically generates and sends a one-time use password to the user's email address.

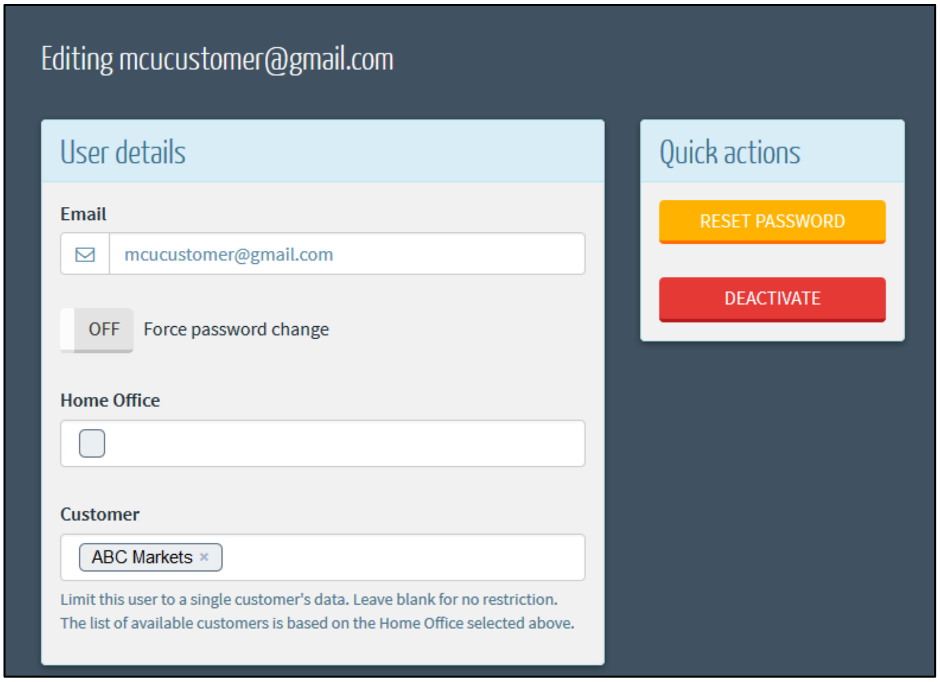
The **Reset Password** button is a quick action button; there is no confirmation screen, so clicking it once will automatically reset that particular user's password. Only use this button when requested or when necessary to reset a user's password.

Editing Users

To edit users:



1. From the **Users** tab, click the pencil icon for a user. **Editing User** screen displays.



2. In the **User details** section, change the following, as applicable:

Email	Account email address.
Force Password Change	Require password change upon next login.
Home Office	Read-only; leave blank.
Customer	Limit user to a single customer's data, or leave blank for no restriction.

3. In the **Roles** section, change the following:

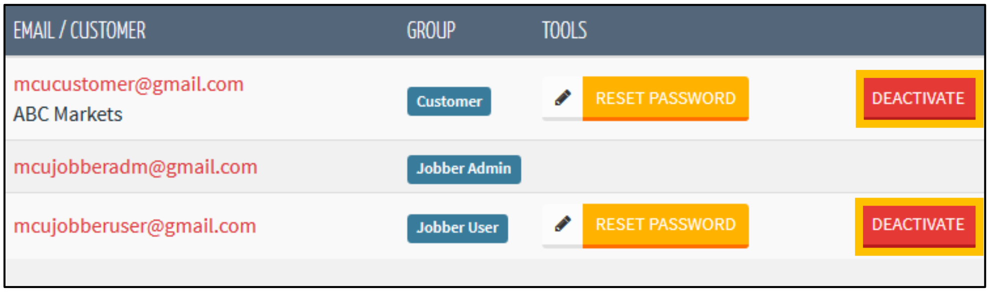
Group	Select either **Customer** or **Jobber User**.
Permissions	Enable/disable different permissions depending on **Group** selected.

Deactivating Users

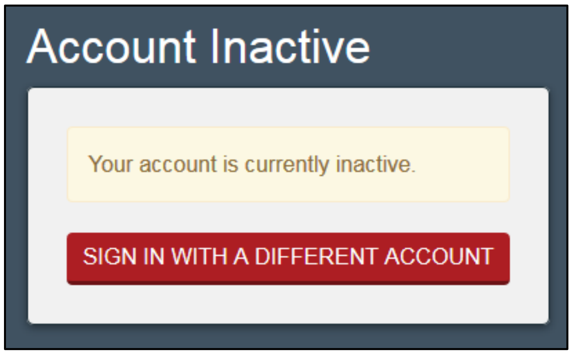
You can deactivate users to prevent them from accessing their accounts. Deactivated users can only be reactivated by a Jobber Admin, Jobber User, or Triple E Support user.

To deactivate users:

- From the **Users** tab, click the **Deactivate** button for a user.



If a deactivated user attempts to access their account, they will receive the following message:

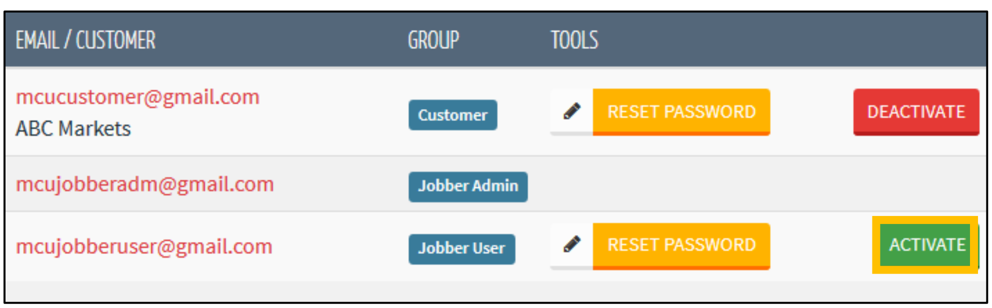


Reactivating Users

You can reactivate disabled users at any time to allow them to access their accounts and perform all actions specified in their user permission settings.

To reactivate users:

- From the **Users** tab, click the **Activate** button for a deactivated user.



Reports

You can use MyCardUpdate to run five different reports. Different configuration options will display depending on the selected report type. Each report uses the same parameters as those used in DataManager.

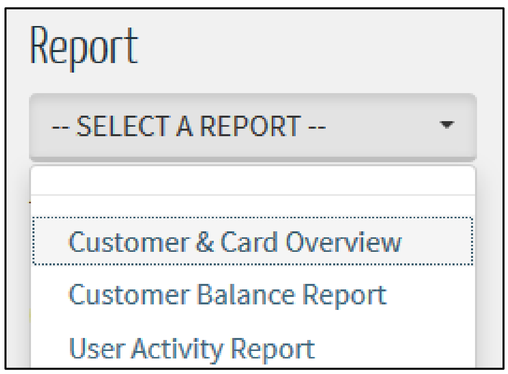
Clicking the **View Report** button will generate and display the report in another tab on your browser. From there, you can download a local copy of the report as a CSV file or print a hard copy.

Customer & Card Overview

The **Customer and Card Overview** generates a list of all customers and their private cards.

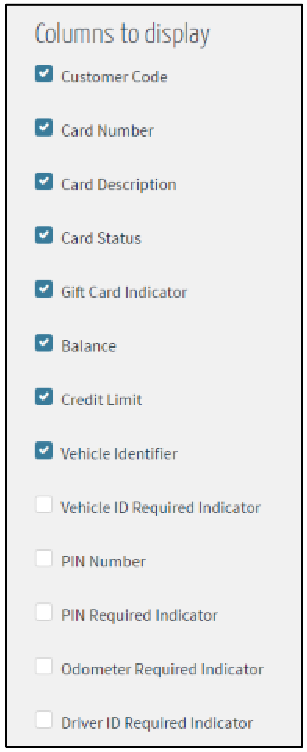
To run the Customer & Card Overview:

1. In the **Reports** tab, select **Customer & Card Overview** from the **Report** dropdown menu. Additional sections display.

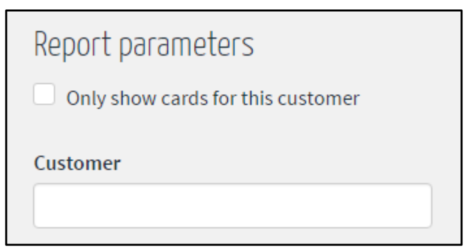


2. In the **Columns to display** section, check or uncheck the following checkboxes:

Customer Code	Unique code identifying customer.
Card Number	Unique number identifying payment card.
Card Description	Unique name or brief text identifying card.
Card Status	Card Active or Inactive status indicator.
Gift Card Indicator	Card type indicator (e.g., Private Card, Gift Card).
Balance	Outstanding account or card balance.
Credit Limit	Customer account credit limit dollar amount.
Vehicle Identifier	Unique number and/or name identifying driver vehicle.
Vehicle ID Required Indicator	Indicates whether card requires Vehicle ID entry for use.
PIN Number	Cardholder Personal Identification Number.
PIN Required Indicator	Indicates whether card requires PIN entry for use.
Odometer Required Indicator	Indicates whether card requires odometer entry for use.
Driver ID Required Indicator	Indicates whether card requires driver ID entry for use.

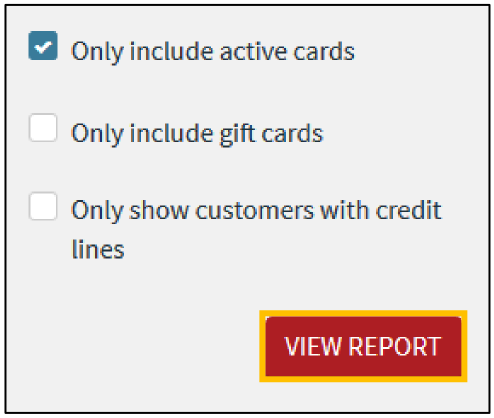


3. If desired, enter a customer in the **Customer** field, then check the **Only show cards for this customer** checkbox to limit the report to the specified customer.

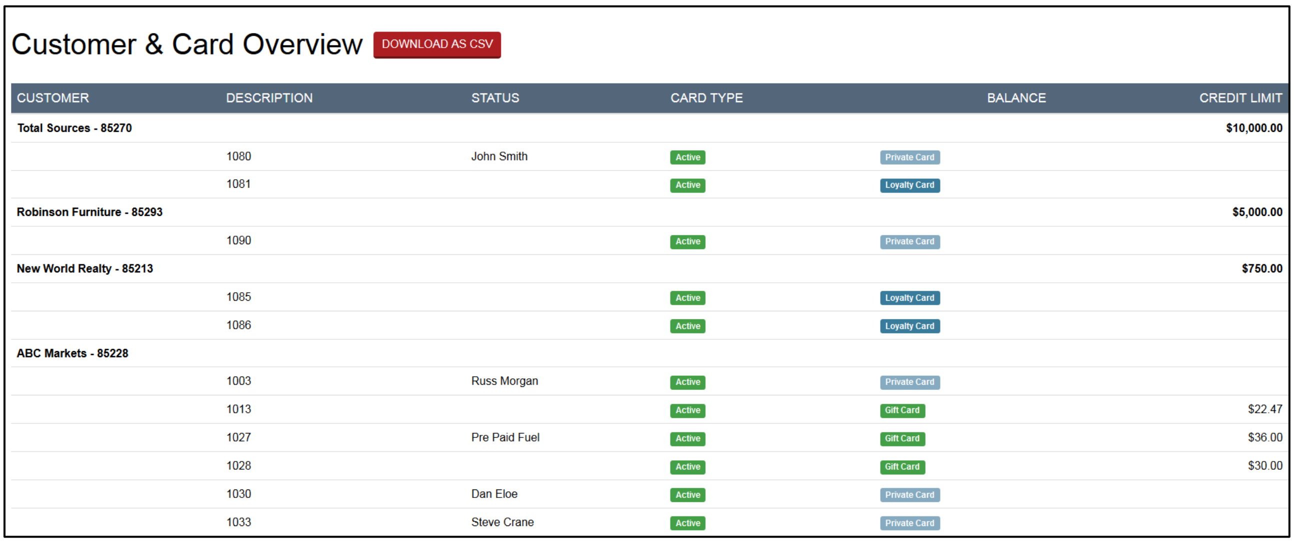


4. Check or uncheck the following checkboxes:

Only include active cards	Only include cards with Active status.
Only include gift cards	Only include cards marked as gift cards.
Only show customers with credit lines	Only include customers with credit charges allowed.



5. Click **View Report**. The report displays in a separate tab.



Customer & Card Overview DOWNLOAD AS CSV

CUSTOMER	DESCRIPTION	STATUS	CARD TYPE	BALANCE	CREDIT LIMIT
Total Sources - 85270					**$10,000.00**
	1080	John Smith	Active	Private Card	
	1081		Active	Loyalty Card	
Robinson Furniture - 85293					**$5,000.00**
	1090		Active	Private Card	
New World Realty - 85213					**$750.00**
	1085		Active	Loyalty Card	
	1086		Active	Loyalty Card	
ABC Markets - 85228					
	1003	Russ Morgan	Active	Private Card	
	1013		Active	Gift Card	$22.47
	1027	Pre Paid Fuel	Active	Gift Card	$36.00
	1028		Active	Gift Card	$30.00
	1030	Dan Eloe	Active	Private Card	
	1033	Steve Crane	Active	Private Card	

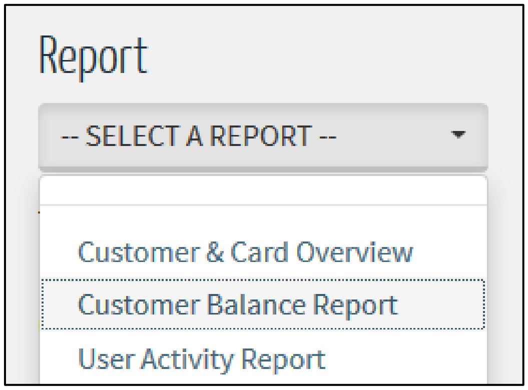
6. If desired, click **Download As CSV** to save the report as a CSV file.

Customer Balance Report

The **Customer Balance Report** generates a list of all customers with an outstanding balance.

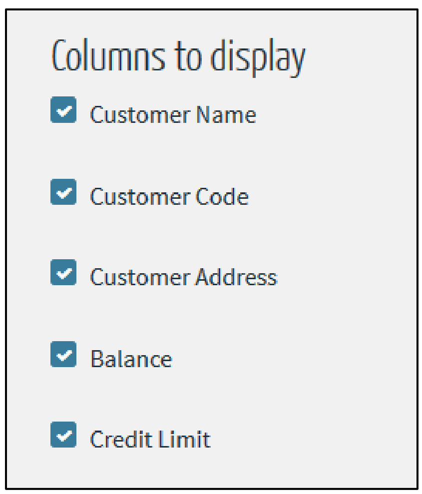
To run the Customer Balance Report:

1. In the **Reports** tab, select **Customer Balance Report** from the **Report** dropdown menu. Additional fields display.

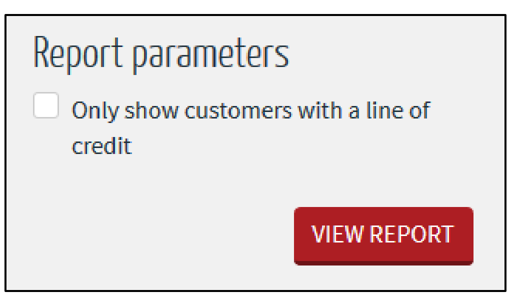


2. In the **Columns to display** section, check or uncheck the following checkboxes:

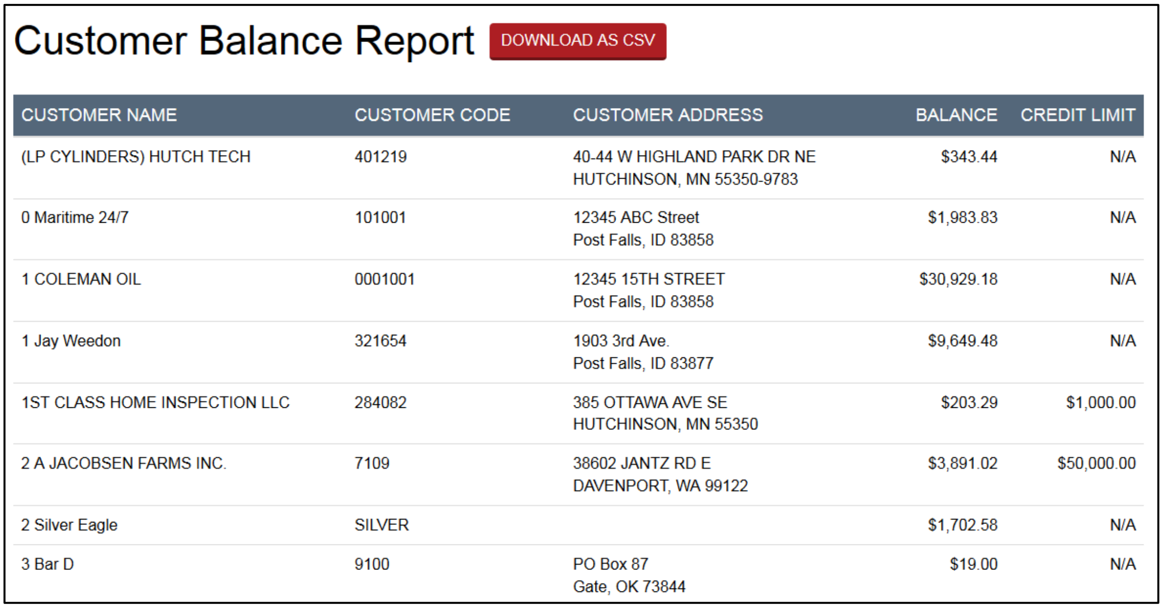
Customer Name	Unique name identifying customer.
Customer Code	Unique number identifying customer.
Customer Address	Street number and name, and unit number, if applicable, and city name and five-digit postal code.
Balance	Outstanding account or card balance.
Credit Limit	Customer account credit limit dollar amount.



3. In the **Report** parameters section, check or uncheck the **Only show customers with a line of credit** checkbox.



4. Click **View Report**. The report displays in a separate tab.



Customer Balance Report

DOWNLOAD AS CSV

CUSTOMER NAME	CUSTOMER CODE	CUSTOMER ADDRESS	BALANCE	CREDIT LIMIT
(LP CYLINDERS) HUTCH TECH	401219	40-44 W HIGHLAND PARK DR NE HUTCHINSON, MN 55350-9783	$343.44	N/A
0 Maritime 24/7	101001	12345 ABC Street Post Falls, ID 83858	$1,983.83	N/A
1 COLEMAN OIL	0001001	12345 15TH STREET Post Falls, ID 83858	$30,929.18	N/A
1 Jay Weedon	321654	1903 3rd Ave. Post Falls, ID 83877	$9,649.48	N/A
1ST CLASS HOME INSPECTION LLC	284082	385 OTTAWA AVE SE HUTCHINSON, MN 55350	$203.29	$1,000.00
2 A JACOBSEN FARMS INC.	7109	38602 JANTZ RD E DAVENPORT, WA 99122	$3,891.02	$50,000.00
2 Silver Eagle	SILVER		$1,702.58	N/A
3 Bar D	9100	PO Box 87 Gate, OK 73844	$19.00	N/A

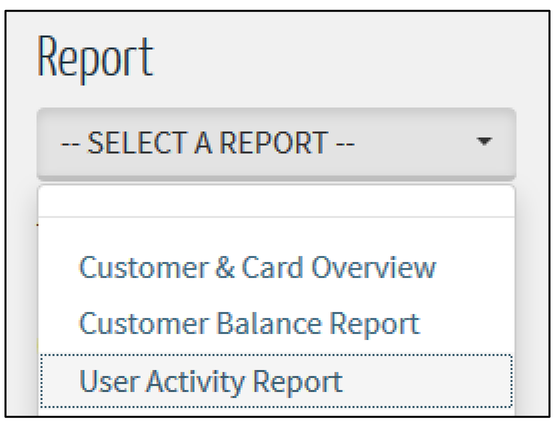
5. If desired, click **Download As CSV** to save the report as a CSV file.

User Activity Report

The **User Activity Report** displays a log of all user activity in MyCardUpdate and is categorized by type.

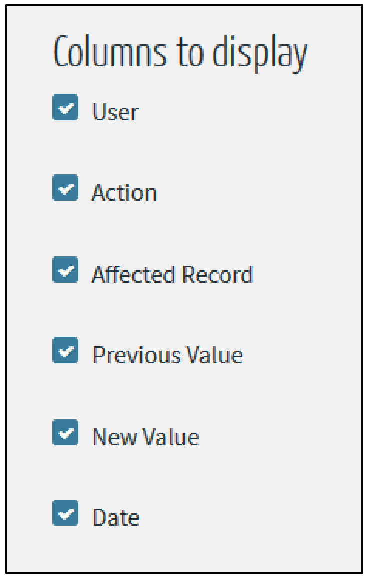
To run the User Activity Report:

1. In the **Reports** tab, select **User Activity Report** from the **Report** dropdown menu.

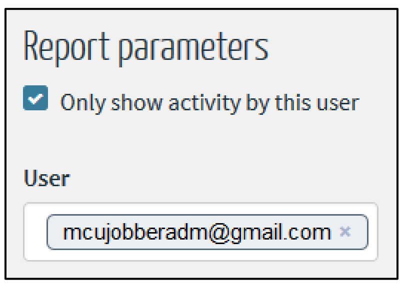


2. In the **Columns to display** section, check or uncheck the following checkboxes:

User	Account user who performed **Action**.
Action	Account activity type (e.g., Login, Logout, Modified).
Affected Record	Account user affected by **Action**.
Previous Value	Original value for value changed.
New Value	New value for value changed.
Date	Date and time (MM/DD/YYYY HH:MM:SS format) **Action** occurred.

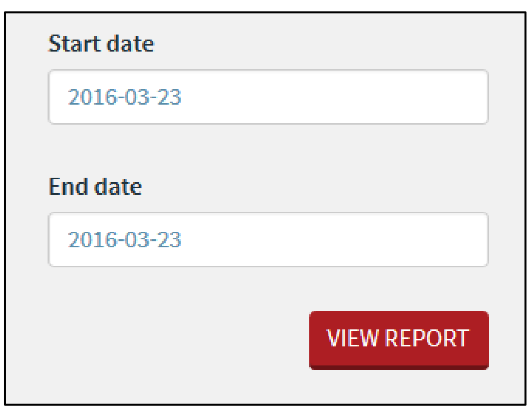


3. If desired, enter a user email address in the **User** field, then check the **Only show activity by this user** checkbox to only report on the specified user.

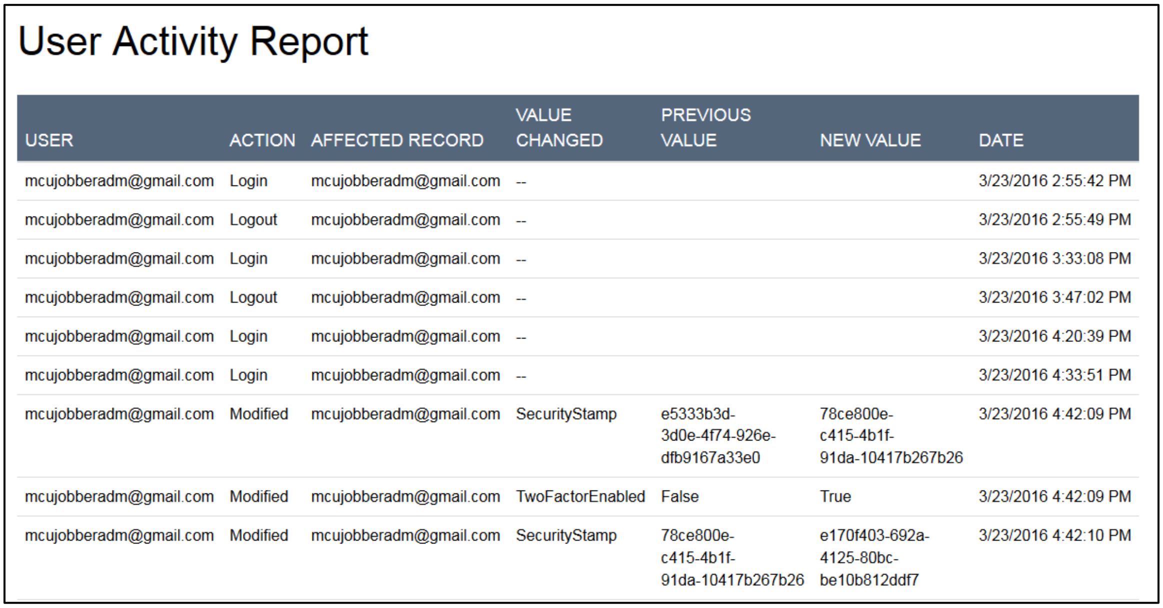


4. Enter values for the following:

Start date	User activity period beginning date.
End date	User activity period end date.



5. Click **View Report**. The report will display in a separate tab.



User Activity Report

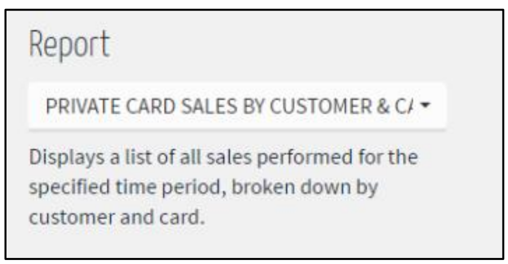
USER	ACTION	AFFECTED RECORD	VALUE CHANGED	PREVIOUS VALUE	NEW VALUE	DATE
mcujobberadm@gmail.com	Login	mcujobberadm@gmail.com	--			3/23/2016 2:55:42 PM
mcujobberadm@gmail.com	Logout	mcujobberadm@gmail.com	--			3/23/2016 2:55:49 PM
mcujobberadm@gmail.com	Login	mcujobberadm@gmail.com	--			3/23/2016 3:33:08 PM
mcujobberadm@gmail.com	Logout	mcujobberadm@gmail.com	--			3/23/2016 3:47:02 PM
mcujobberadm@gmail.com	Login	mcujobberadm@gmail.com	--			3/23/2016 4:20:39 PM
mcujobberadm@gmail.com	Login	mcujobberadm@gmail.com	--			3/23/2016 4:33:51 PM
mcujobberadm@gmail.com	Modified	mcujobberadm@gmail.com	SecurityStamp	e5333b3d-3d0e-4f74-926e-dfb9167a33e0	78ce800e-c415-4b1f-91da-10417b267b26	3/23/2016 4:42:09 PM
mcujobberadm@gmail.com	Modified	mcujobberadm@gmail.com	TwoFactorEnabled	False	True	3/23/2016 4:42:09 PM
mcujobberadm@gmail.com	Modified	mcujobberadm@gmail.com	SecurityStamp	78ce800e-c415-4b1f-91da-10417b267b26	e170f403-692a-4125-80bc-be10b812ddf7	3/23/2016 4:42:10 PM

Private Card Sales by Customer & Card Report

The **Private Card Sales by Customer & Card Report** displays a list of all sales performed for the specified time period, broken down by customer and card.

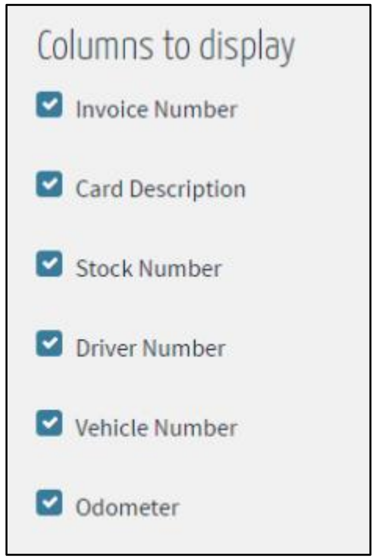
To run the Private Card Sales by Customer & Card Report:

1. In the **Reports** tab, select **Private Card Sales By Customer & Card Report** from the **Report** dropdown menu.

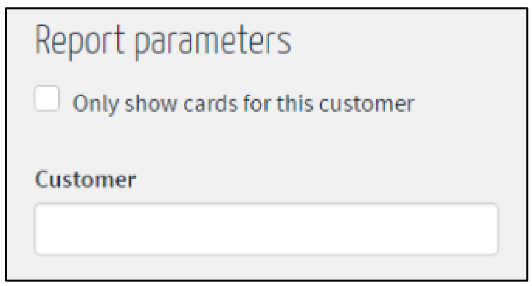


2. In the **Columns to display** section, check or uncheck the following checkboxes:

Invoice Number	**Unique number identifying invoice.**
Card Description	Unique card description, such as cardholder name.
Stock Number	Unique number identifying item.
Driver Number	Unique number identifying driver.
Vehicle Number	Unique number identifying vehicle.
Odometer	Vehicle odometer reading in whole miles.

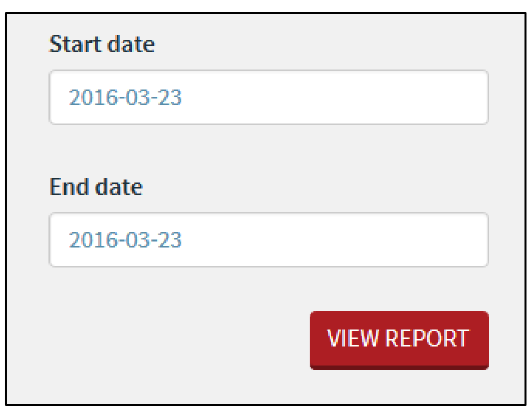


3. If desired, enter a customer account in the **Customer** field, then check the **Only show cards for this customer** checkbox to only report on the specified user.



4. Enter values for the following:

Start date	User activity period beginning date.
End date	User activity period end date.



5. Click **View Report**. The report will display in a separate tab.

Private Card Sales by Customer & Card **DOWNLOAD AS CSV**

04/04/2017 through 05/04/2017

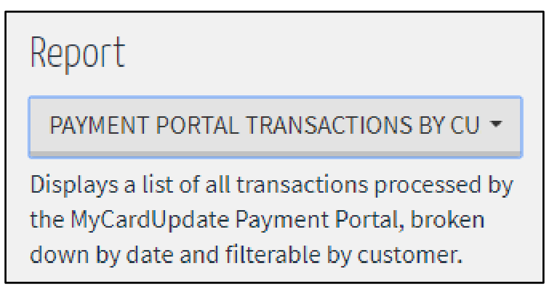
Customer with card data									
Date & Time	**Card #**	**Invoice #**	**Card Desc**	**Stock #**	**Item Description**	**Odometer**	**Qty**	**Unit Price**	**Ext Amt**
4/7/2017 4:10:32 PM	1080	**1**	testthis100	UNL	Unleaded Fuel	1347282	2.293	$2.50	$2.50
5/3/2017 2:22:43 PM	1080	**1003**	testthis100	WIPERS14	Wiper Blades	0	1.000	$6.00	$6.50
5/3/2017 2:22:43 PM	1080	**1003**	testthis100	DL1	Diesel Fuel	0	5.843	$2.31	$13.50
Totals for Customer with card data						**2 Transactions**	**9.136**		**$22.50**
Joe's Landscaping									
Date & Time	**Card #**	**Invoice #**	**Card Desc**	**Stock #**	**Item Description**	**Odometer**	**Qty**	**Unit Price**	**Ext Amt**
4/7/2017 4:20:44 PM	1081	**1002**	testthis100	HAMBURG1	Hamburger	0	2.000	$2.00	$4.43
Totals for Joe's Landscaping						**1 Transactions**	**2.000**		**$4.43**
Grand Totals						**3 Transactions**	**11.136**		**$26.93**

Payment Portal Transactions by Customer

The **Payment Portal Transactions by Customer** report displays a list of all transactions processed by the MyCardUpdate Payment Portal, broken down by date and filterable by customer.

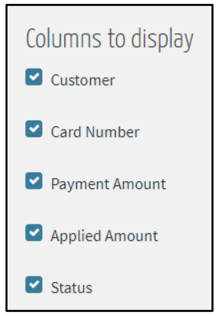
To run the Payment Portal Transactions by Customer report:

1. In the **Reports** tab, select **Payment Portal Transactions by Customer** from the **Report** dropdown menu.

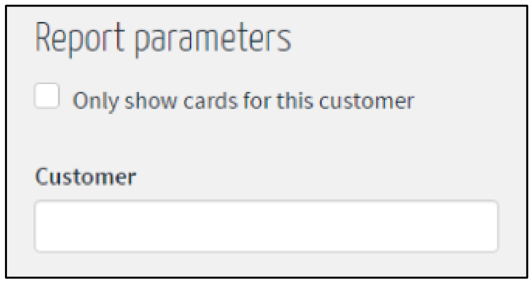


2. In the **Columns to Display** section, check or uncheck the following options:

Customer	**Unique name identifying customer.**
Card Number	Unique number identifying card.
Payment Amount	Total dollar amount customer paid (including convenience fee).
Applied Amount	Dollar amount that was applied to the selected **Card Number**.
Status	Current state of customer payment (completed or pending).



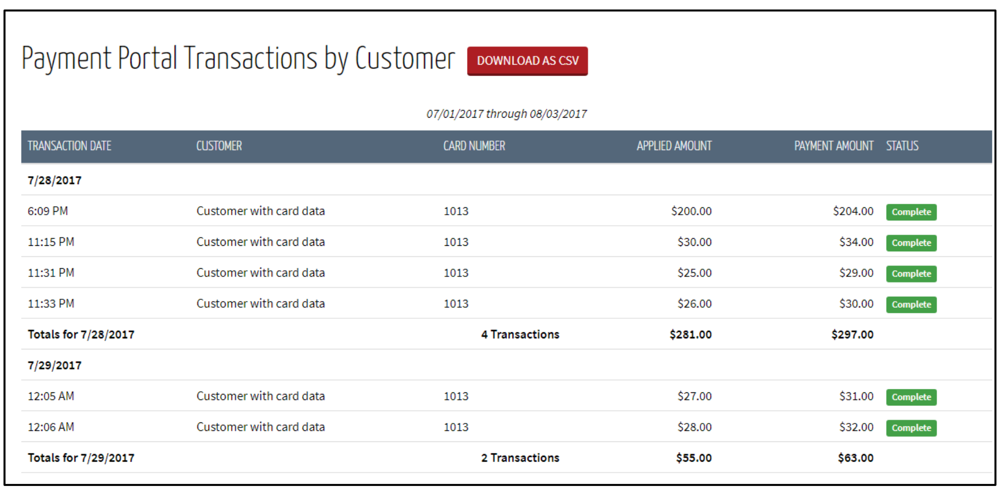
3. If desired, enter a customer account in the **Customer** field, then check the **Only show cards for this customer** checkbox to only report on the specified user.



4. Enter values for the following:

Start date	Transaction period beginning date.
End date	Transaction period end date.

5. Click **View Report**. The report will display in a separate tab.



TRANSACTION DATE	CUSTOMER	CARD NUMBER	APPLIED AMOUNT	PAYMENT AMOUNT	STATUS
7/28/2017					
6:09 PM	Customer with card data	1013	$200.00	$204.00	Complete
11:15 PM	Customer with card data	1013	$30.00	$34.00	Complete
11:31 PM	Customer with card data	1013	$25.00	$29.00	Complete
11:33 PM	Customer with card data	1013	$26.00	$30.00	Complete
Totals for 7/28/2017		**4 Transactions**	**$281.00**	**$297.00**	
7/29/2017					
12:05 AM	Customer with card data	1013	$27.00	$31.00	Complete
12:06 AM	Customer with card data	1013	$28.00	$32.00	Complete
Totals for 7/29/2017		**2 Transactions**	**$55.00**	**$63.00**	