Import Credit Card Fuel Purchases

Link: https://help.wextelematics.com/deep-dive/import-credit-card-fuel-purchase-data/ Last Updated: September 26th, 2017

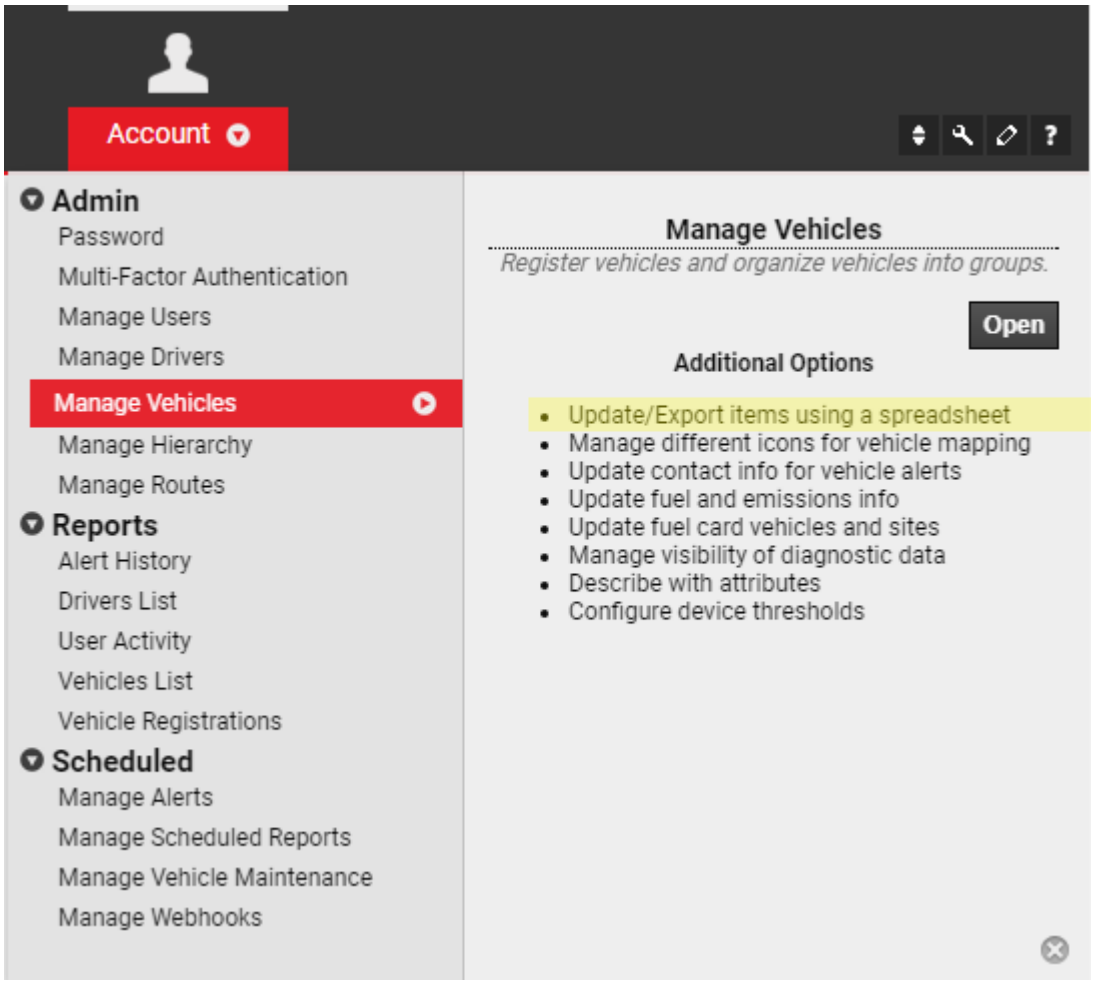
How to Import Generic Fuel Card Transactions

Note. Fuel Card reports are only available to Fuel Card customers. If you are interested in adding the Fleet Fuel Card to your account, please contact your Account Manager.

The Fuel Card Transactions Report and Fuel Card Usage Report can be populated with fuel purchase data sourced from *any* credit card(s) using a CSV Excel spreadsheet file. An example import file is provided in the portal for formatting.

Spreadsheet Update

From the portal main menu, go to:
Account → Admin → Manage Vehicles → Additional Options → Update/Export items using a spreadsheet.

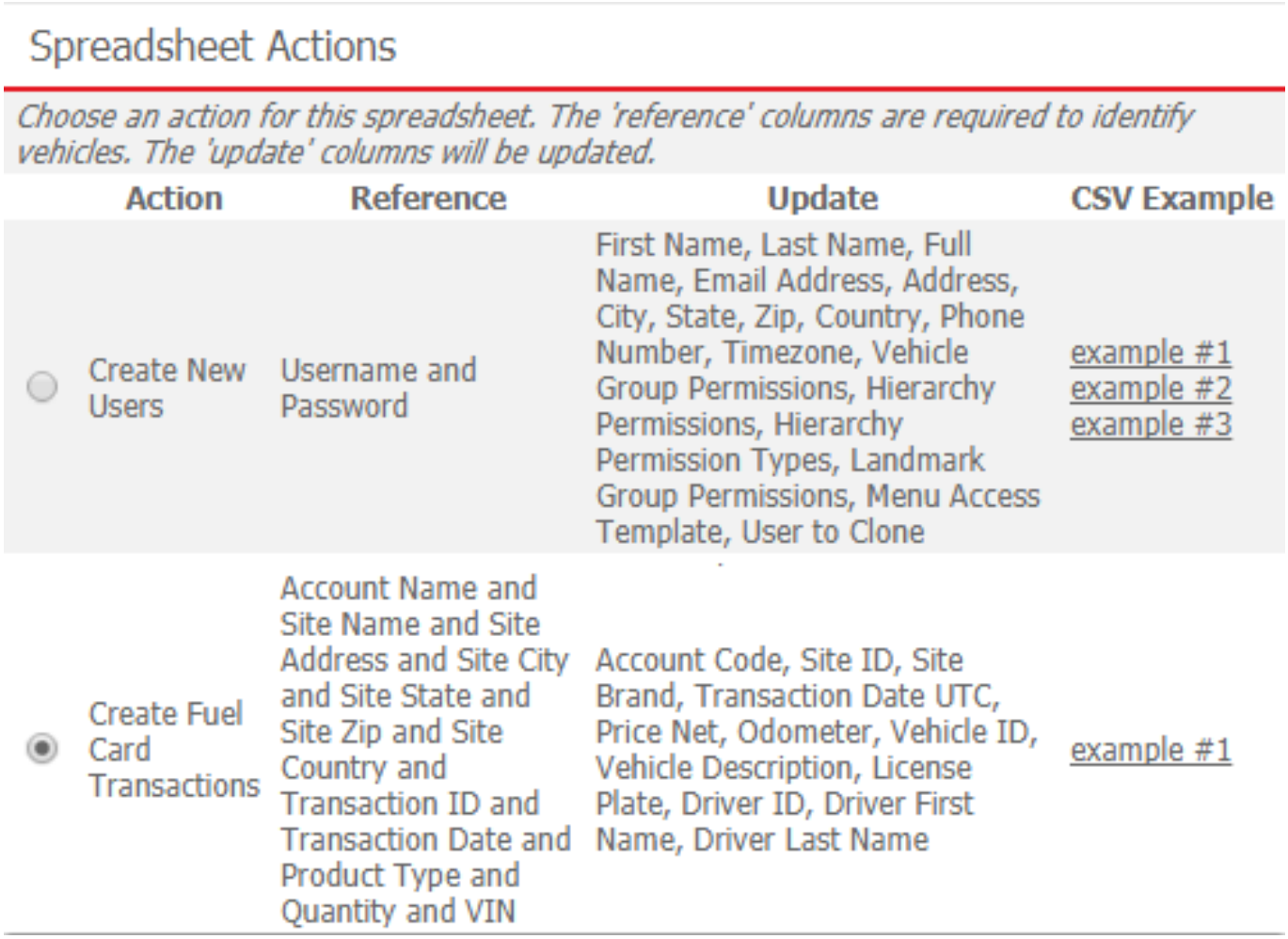


Spreadsheet Actions

Go to: **Create Fuel Card Transactions** at the bottom of the list in **Spreadsheet Actions**.

Copyright ©2024 Wex Telematics

Import Credit Card Fuel Purchases



Spreadsheet Actions

Choose an action for this spreadsheet. The 'reference' columns are required to identify vehicles. The 'update' columns will be updated.

Action	Reference	Update	CSV Example
○ Create New Users	Username and Password	First Name, Last Name, Full Name, Email Address, Address, City, State, Zip, Country, Phone Number, Timezone, Vehicle Group Permissions, Hierarchy Permissions, Hierarchy Permission Types, Landmark Group Permissions, Menu Access Template, User to Clone	example #1 example #2 example #3
◉ Create Fuel Card Transactions	Account Name and Site Name and Site Address and Site City and Site State and Site Zip and Site Country and Transaction ID and Transaction Date and Product Type and Quantity and VIN	Account Code, Site ID, Site Brand, Transaction Date UTC, Price Net, Odometer, Vehicle ID, Vehicle Description, License Plate, Driver ID, Driver First Name, Driver Last Name	example #1

Import file Format

- Click on *example #1* to download/save the **CSV Example** file.
- Open the example file in Microsoft® Excel™ or a similar spreadsheet editor.
- The header Row 1 includes all available column header names. Copy/paste or type these header names into a spreadsheet with the data.
- The order of the columns in the spreadsheet does not matter.
- All the Reference fields are required for the data to be imported.

Required Reference Fields

Account Name
Site Name
Site Address
Site City
Site State
Site Zip
Site Country
Transaction ID
Transaction Date
Product Type
Quantity
VIN

Copyright ©2024 Wex Telematics

Import Credit Card Fuel Purchases

	A	B	C	D	E	F	G	
1	Account Code	Account Name	Site ID	Site Name	Site Address	Site City	Site State	Si
2	G1231	ABC Fuel Card A	12354	Circle K #123	20721 N Scot	Scottsdale	AZ	
3								
4								

Tip! Each row corresponds to one credit card fuel purchase per vehicle. Row 2 in the *example #1* file is example data for reference purposes only.

Import: Step-by-Step

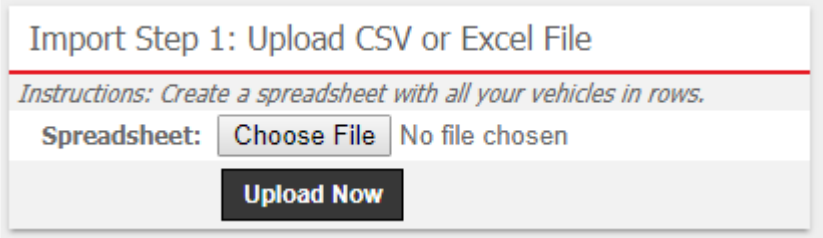
1. Choose File

In **Spreadsheet Actions**, at the bottom of the list, click the radio button to select **Create Fuel Card Transactions**.

In the **Import Step 1** (top-left), click the **Choose File** button, then browse to the location where you saved the CSV or Excel file to be imported.

Select the file and click the **Open** button or double-click on the file.

Click the **Upload Now** button.



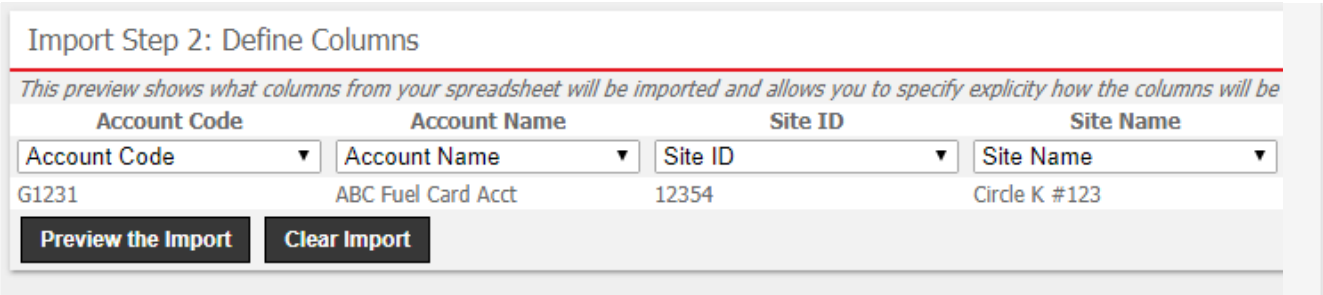
2. Define Columns

The **Define Columns** grid appears. This grid shows how the spreadsheet column header names (shown in bold) will be mapped to each field in the portal. If there are any mismatched fields or any marked “IGNORE”, select the appropriate field name in the drop down list.

All 12 required Reference fields must have data mapped to them, but the other Update fields are optional.

Click the **Preview the Import** button.

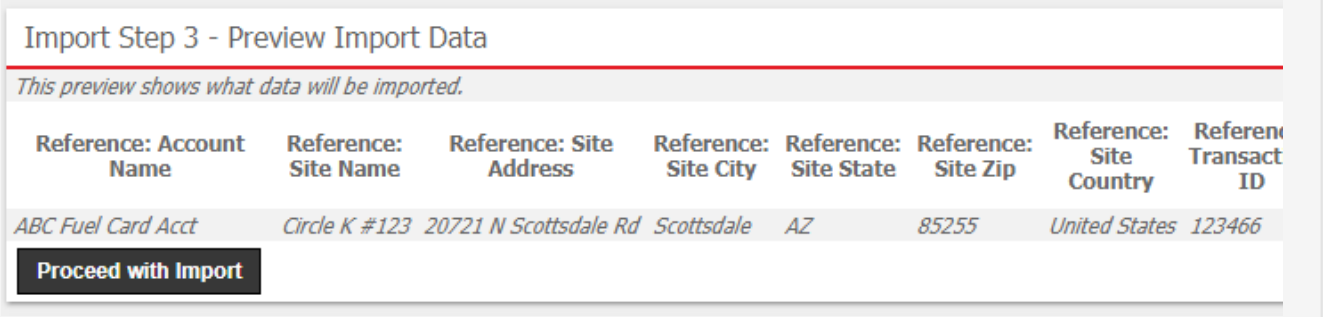
Copyright ©2024 Wex Telematics



3. Preview

The **Preview Import Data** grid appears. Use this grid to verify the data before it is imported. Valid values for reference fields will be marked with a green check box.

Click the **Proceed with Import** button.



4. Import

The **Import All Data** grid appears. This grid provides a summary of the imported results. If any rows were skipped, they will be listed here with the reason they were not imported.

Note. It is necessary to log out of the portal and log in again before the reports will be visible in the drop-down **Reports** menu.

Copyright ©2024 Wex Telematics

Import Credit Card Fuel Purchases

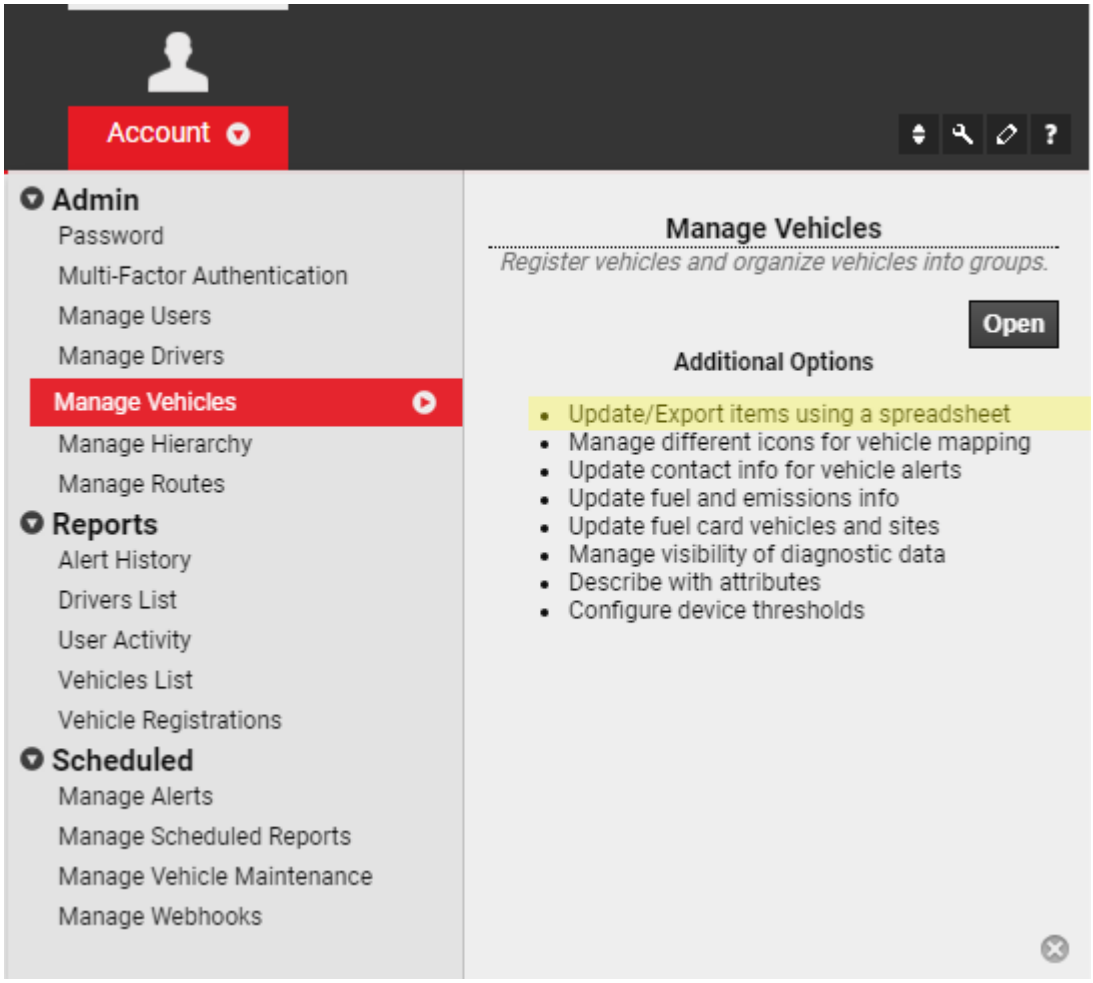
Link: https://help.wextelematics.com/deep-dive/import-credit-card-fuel-purchase-data/ Last Updated: September 26th, 2017

How to Import Generic Fuel Card Transactions

The Fuel Card Transactions Report and Fuel Card Usage Report can be populated with fuel purchase data sourced from *any* credit card(s) using a CSV Excel spreadsheet file. An example import file is provided in the portal for formatting.

Spreadsheet Update

From the portal main menu, go to:
Account → Admin → Manage Vehicles → Additional Options → Update/Export items using a spreadsheet.

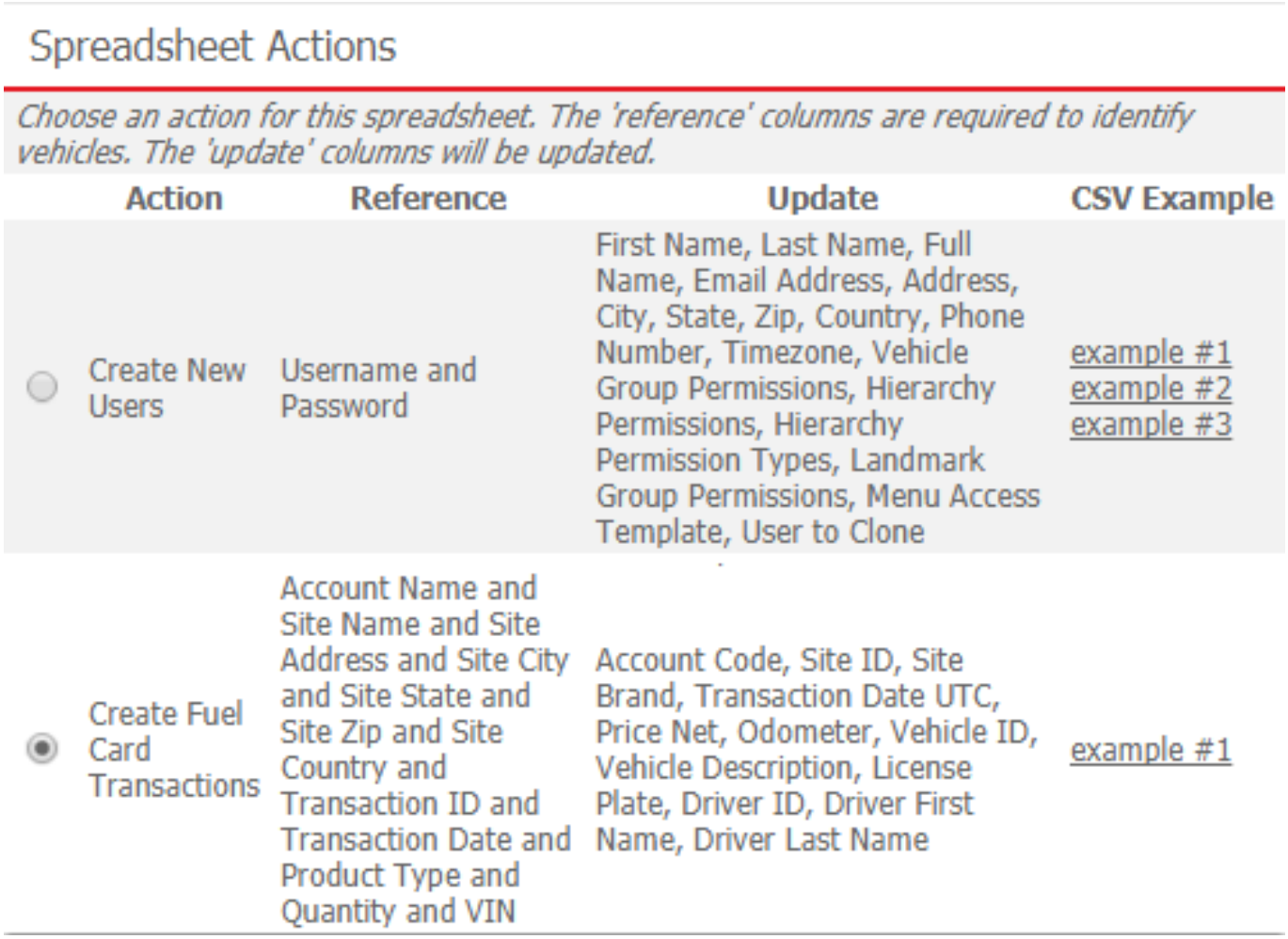


Spreadsheet Actions

Go to: **Create Fuel Card Transactions** at the bottom of the list in **Spreadsheet Actions**.

Copyright ©2024 Wex Telematics

Import Credit Card Fuel Purchases



Spreadsheet Actions

Choose an action for this spreadsheet. The 'reference' columns are required to identify vehicles. The 'update' columns will be updated.

Action	Reference	Update	CSV Example
○ Create New Users	Username and Password	First Name, Last Name, Full Name, Email Address, Address, City, State, Zip, Country, Phone Number, Timezone, Vehicle Group Permissions, Hierarchy Permissions, Hierarchy Permission Types, Landmark Group Permissions, Menu Access Template, User to Clone	example #1 example #2 example #3
◉ Create Fuel Card Transactions	Account Name and Site Name and Site Address and Site City and Site State and Site Zip and Site Country and Transaction ID and Transaction Date and Product Type and Quantity and VIN	Account Code, Site ID, Site Brand, Transaction Date UTC, Price Net, Odometer, Vehicle ID, Vehicle Description, License Plate, Driver ID, Driver First Name, Driver Last Name	example #1

Import file Format

- Click on *example #1* to download/save the **CSV Example** file.
- Open the example file in Microsoft® Excel™ or a similar spreadsheet editor.
- The header Row 1 includes all available column header names. Copy/paste or type these header names into a spreadsheet with the data.
- The order of the columns in the spreadsheet does not matter.
- All the Reference fields are required for the data to be imported.

Required Reference Fields

Account Name
Site Name
Site Address
Site City
Site State
Site Zip
Site Country
Transaction ID
Transaction Date
Product Type
Quantity
VIN

Copyright ©2024 Wex Telematics

	A	B	C	D	E	F	G	
1	Account Code	Account Name	Site ID	Site Name	Site Address	Site City	Site State	Si
2	G1231	ABC Fuel Card A	12354	Circle K #123	20721 N Scot	Scottsdale	AZ	
3								
4								

Tip! Each row corresponds to one credit card fuel purchase per vehicle. Row 2 in the *example #1* file is example data for reference purposes only.

Import: Step-by-Step

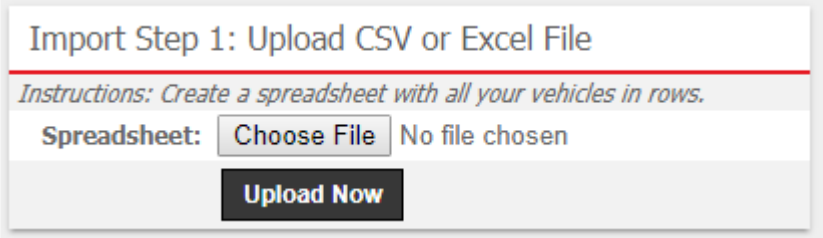
5. Choose File

In **Spreadsheet Actions**, at the bottom of the list, click the radio button to select **Create Fuel Card Transactions**.

In the **Import Step 1** (top-left), click the **Choose File** button, then browse to the location where you saved the CSV or Excel file to be imported.

Select the file and click the **Open** button or double-click on the file.

Click the **Upload Now** button.



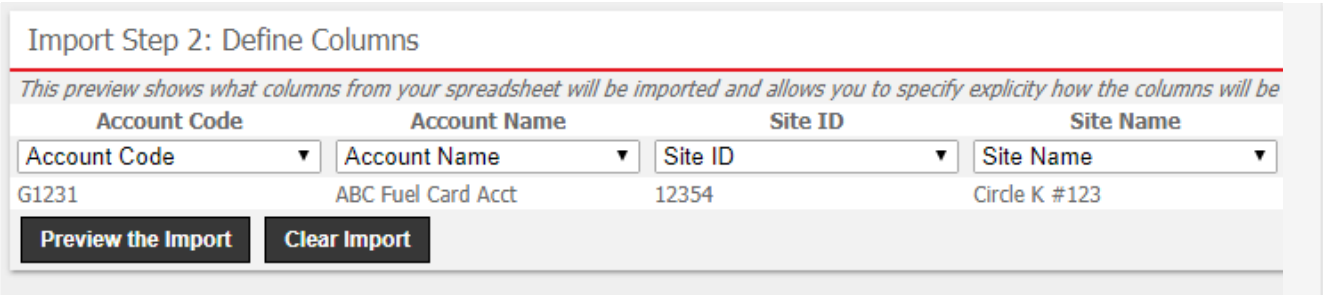
6. Define Columns

The **Define Columns** grid appears. This grid shows how the spreadsheet column header names (shown in bold) will be mapped to each field in the portal. If there are any mismatched fields or any marked “IGNORE”, select the appropriate field name in the drop down list.

All 12 required Reference fields must have data mapped to them, but the other Update fields are optional.

Click the **Preview the Import** button.

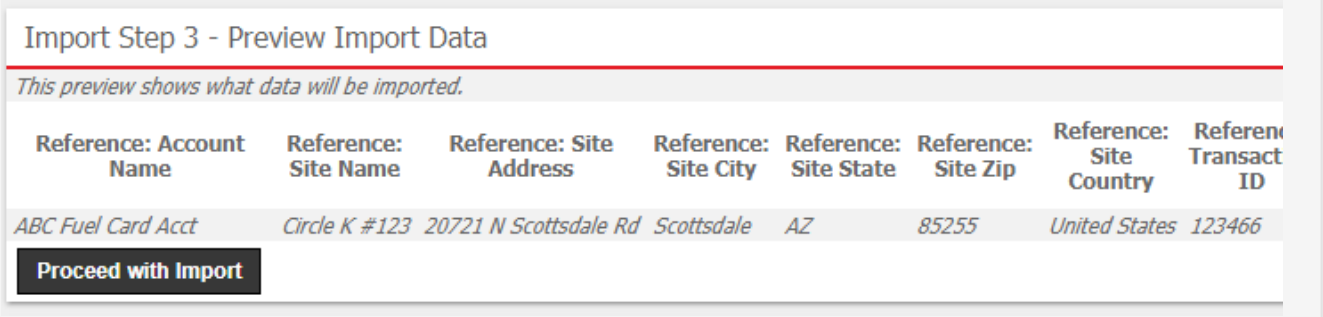
Copyright ©2024 Wex Telematics



7. Preview

The **Preview Import Data** grid appears. Use this grid to verify the data before it is imported. Valid values for reference fields will be marked with a green check box.

Click the **Proceed with Import** button.



8. Import

The **Import All Data** grid appears. This grid provides a summary of the imported results. If any rows were skipped, they will be listed here with the reason they were not imported.

Note. It is necessary to log out of the portal and log in again before the reports will be visible in the drop-down **Reports** menu.

Copyright ©2024 Wex Telematics