eManager Quick Reference Guide
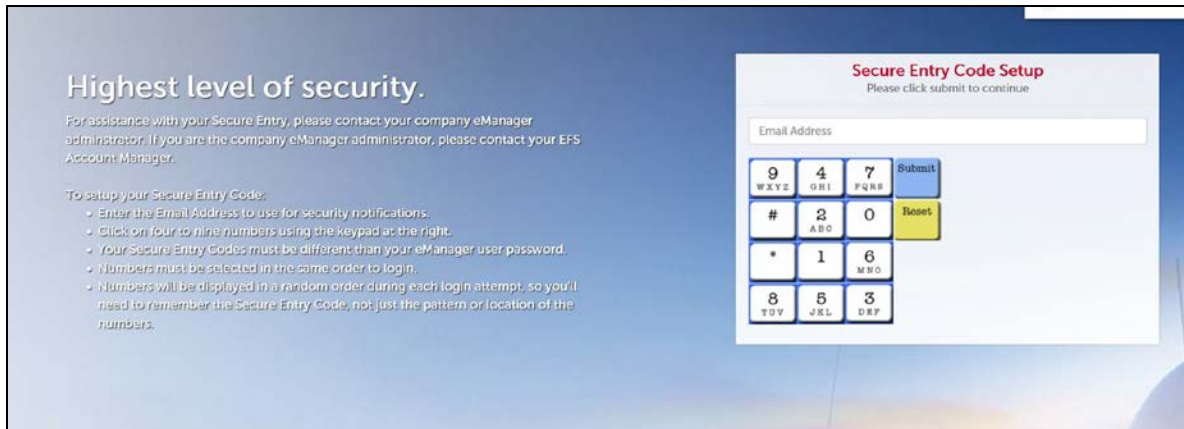
Card Management

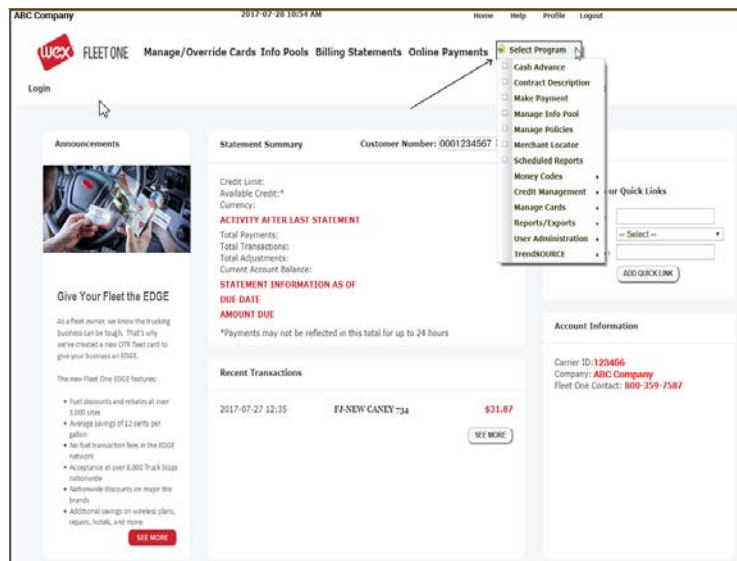November 2017

Log In:
1. Go to https://manage.fleetone.com
2. Enter Carrier ID/Username and Password
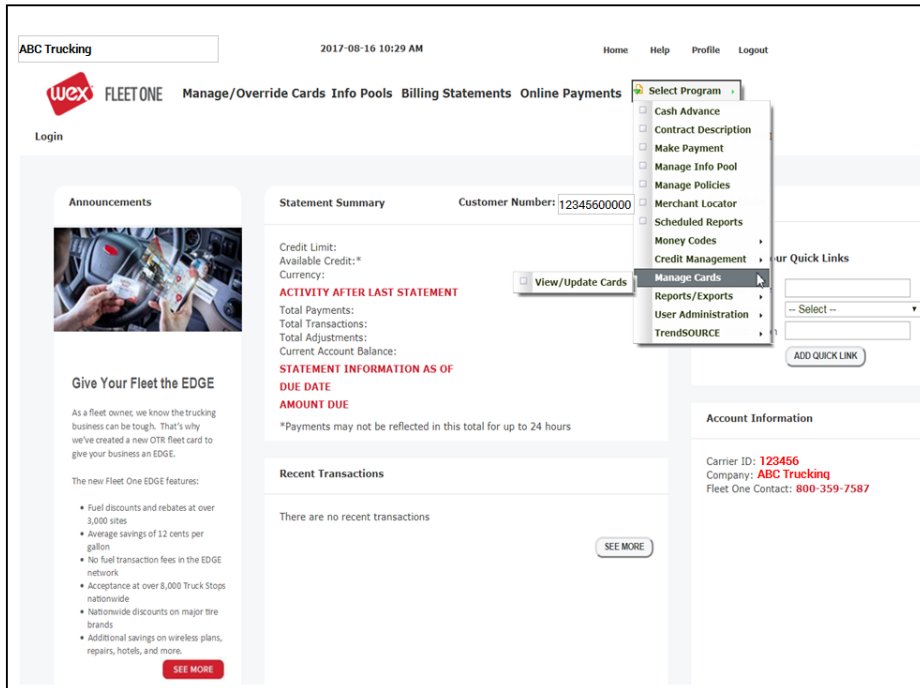

3. Enter Secure Entry Code

4. Once logged in, hover over 'SELECT PROGRAM' to see the menu of available options
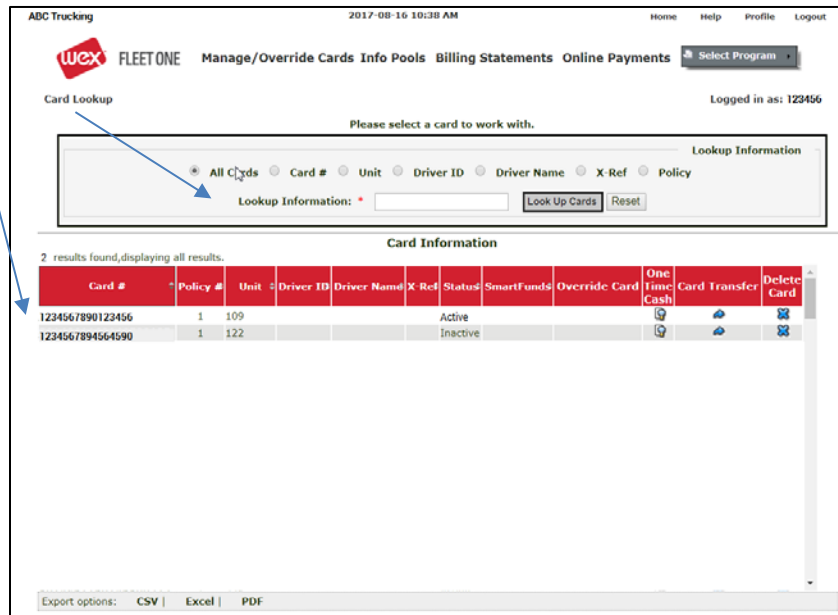
Card Management:
LOOK UP A CARD
"Select Program" > "Manage Cards" > "View/Update Cards"

- Look up the card by Card # (last 4-5 digits), Unit, Driver ID, Driver Name, X-Ref or Policy
- Select the card by clicking on the card number

SETTING UP A NEW CARD
"Select Program" > "Manage Cards" > "View/Update Cards"

- Look up the card by Card # (last 4-5 digits), Unit, Driver ID, Driver Name, X-Ref or Policy (Branch)
- Select the card by clicking on the card number

- Select the appropriate policy (limits/prompts) that the card is assigned to
- Under 'Card Status', select 'Active'
- Under Information, select 'Both'
- Click 'Save'

- Click 'Add Prompt' on the middle left side of the screen

- Select the Prompt ID to be entered (i.e. Driver ID) and click 'Next'
- Select the validation of the policy (i.e. Numeric or Exact Match) and click 'Next'

- Enter the 'Value'
- Add additional information until all values are established

EXAMPLE:

Source	Prompt	Validation	Value	Edit	Delete
Card	Driver ID	Exact Match	12335	✎	✖
Card	Driver Name	Report Only	Bob Driver	✎	✖
Policy	Subfleet Identifier	Report Only	OTR Fleet		
Policy	Unit Number	Information Pool			

To 'Edit' or 'Delete' card prompts select the 'Edit' or 'Delete' buttons to the right of the 'Value' column.

CHANGING THE STATUS OF A CARD
"Select Program" > "Manage Cards" > "View/Update Cards"
- Look up the card by card #, Unit, Driver ID, Driver Name, X-Ref or Policy
- Under 'Card Status', following options are available:
    - 'Active' to activate the card
    - 'Hold' to put the card on hold temporarily, cardholder cannot use the card – the cardholder's PIN remains and is still valid when the card is reactivated
    - 'Inactive' use when the card is to be blocked and the cardholder's PIN is disabled – if the card is reactivated the PIN will default to the last 4-digits of the card number and the cardholder will be forced to reset the PIN if using the IVR or ATM
- Select 'Save'

CREATING A CASH ADVANCE ON A CARD – "ONE-TIME CASH"
"Select Program" > "Cash Advance"
- Look up the card by card #, Unit, Driver ID, Driver Name, X-Ref or Policy
- Select the card by clicking on the card number
- The 'Add One Time Cash' screen will display

Card # 7083050010600797937   Individual Card - One Time Cash History

Add One Time Cash Record

Amount * 100
Reference # 17789
Note: Lumper Service
240 Characters Allowed
Add Cash   Remove Cash   Cancel

Available Cash
Policy/Card Cash: $50.00
One Time Cash: $100.00
Total Cash: $150.00
Contract Limit: $210.00
Amount Available: $150.00

- Available Cash is displayed to show how much cash is currently available on the card
- Check the card's Cash Advance History by clicking 'Individual Card - One Time Cash History' link in the upper middle of the screen
- Enter the amount for the Cash Advance and any other reference numbers ('10' and '10.00' are both equal to $10.00)
- Select 'Add Cash'
- 'Successful Add' message will display at the top of the screen

Successfully added $100 to card 7083050010600797937

- To remove One Time Cash from a card enter the amount and select 'Remove Cash'
- The Cash Advance screen can also be accessed by going through 'Manage Cards' and clicking on the 'One Time Cash' icon:

Card #	Policy #	Unit	Driver ID	Driver Name	X-Ref	Status	SmartFunds	Override Card	One Time Cash	Card Transfer	Delete Card
7083050030450	1	85172	GRAGLE	GLEN M GRAVES		Active / Payroll Active	Universal	🖼	🖼	🖼	✖

ASSIGNING A REPLACEMENT CARD TO A CARDHOLDER

"Select Program" > "Manage Cards" > "View/Update Cards"

- Look up the cardholder's existing card
- Select 'Card Transfer' on the right side of the screen

Card #	Policy #	Unit	Driver ID	Driver Name	X-Ref	Status	SmartFunds	Override Card	One Time Cash	Card Transfer	Delete Card
7083050030450	1	85172	GRAGLE	GLEN M GRAVES		Active / Payroll Active	Universal	🖼	🖼	🖼	✖

- Select 'Card Transfer' on the right side of the screen
- Enter or look up the cardholder's new card number
- Apply the transfer
- Look up the cardholder's old card
- Delete the old card by selecting "X" on the right side of the screen to delete

Card #	Policy #	Unit	Driver ID	Driver Name	X-Ref	Status	SmartFunds	Override Card	One Time Cash	Card Transfer	Delete Card
7083050030450	1	85172	GRAGLE	GLEN M GRAVES		Active / Payroll Active	Universal	🖼	🖼	🖼	✖

OVERRIDE FOR AN ADDITIONAL PRODUCT – OR A PRODUCT'S LIMIT HAS BEEN USED

"Select Program" > "Manage Cards" > "View/Update Cards"

- Look up the card by card #, Unit, Driver ID, Driver Name, X-Ref or Policy
- Select 'Override Card' on the right side of the screen

Card #	Policy #	Unit	Driver ID	Driver Name	X-Ref	Status	SmartFunds	Override Card	One Time Cash	Card Transfer	Delete Card
7083050030450	1	85172	GRAGLE	GLEN M GRAVES		Active / Payroll Active	Universal	🖼	🖼	🖼	✖

- Select the number of overrides (i.e. number of card swipes override is valid)
- Select 'Product / Limit Override'
- Select 'Override Card'

- Select product to override and then 'Next'

- Enter Amount
    - Any product dispensed is in Gallons and anything purchased inside the store is in Dollars
- 'Hours' represents the number of hours allowed between swipes if multiple swipes are selected
    - The default is 1 and typically this is left at 1 to not detain cardholder from making purchases
- Select 'Complete Override'
    - Select 'Save and Add Another' if multiple products are being overridden (i.e. diesel – see notes below) and repeat the previous steps
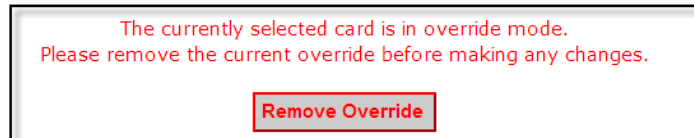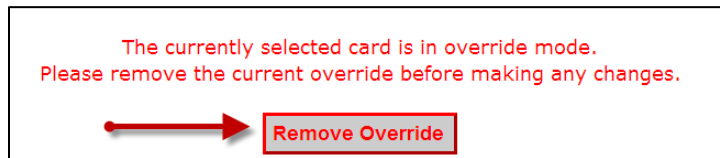
- The card will display to the screen with message that card is in override and a 'Remove Override' button displaying

The currently selected card is in override mode.
Please remove the current override before making any changes.

Remove Override

- Once the card is swiped, the number of overrides selected will automatically be removed.

NOTES:
- When overriding fuel, add product DSL for the desired gallons, select 'Save and Add Another' and also add product ULSD for the desired gallons. This is done because different truck stops use different product codes for fuel.
  - The system will not combine the gallon limit on DLS and ULSD as it recognizes this as one product.
- Override limit <u>does not</u> 'add' to the existing limit; it is REPLACING the limit as a daily total (i.e. if a card has a 100 gallon limit of diesel and the card needs an additional 50 gallons, the override would need to be in place for 150 gallons).
- If there is no button to select under 'Override Card' the card is already in override. Click on the card number and the card will display with a 'Remove Override' option. Click on this button to remove any existing override on the card.
- To Remove an override bring up the card and click on the 'Remove Override' button.

The currently selected card is in override mode.
Please remove the current override before making any changes.

Remove Override

- When a card is in override no changes can be made to the card (i.e. status, add cash, etc.), therefore, it is recommended that (1) one override/swipe be selected.

OVERRIDE FOR AN OUT-OF-NETWORK FUELING LOCATION – OR WAIT TIME
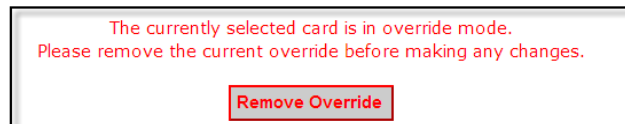"Select Program" > "Manage Cards" > "View/Update Cards"
- Look up the card by card #, Unit, Driver ID, Driver Name, X-Ref or Policy
- Select 'Override Card' on the right side of the screen

Card #	Policy #	Unit	Driver ID	Driver Name	X-Ref	Status	SmartFunds	Override Card	One Time Cash	Card Transfer	Delete Card
7083050030450	1	85172	GRAGLE	GLEN M GRAVES		Active / Payroll Active	Universal	📷	📷	➔	✖

- Select the number of overrides (i.e. number of card swipes override is valid)
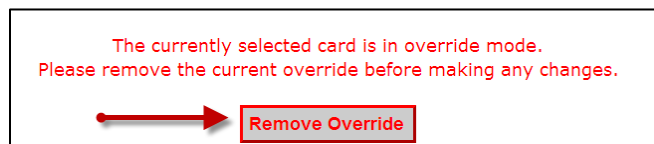- Select 'All Locations'
- Select 'Override Card'

- The card will display to the screen with message that card is in override and a 'Remove Override' button displaying

The currently selected card is in override mode.
Please remove the current override before making any changes.

Remove Override

- Once the card is swiped the number of overrides selected the override will automatically be removed.

NOTES:
- If there is no button to select under 'Override Card' the card is already in override. Click on the card number and the card will display with a 'Remove Override'. Click on this button to remove any existing override on the card.
- To Remove an override bring up the card and click on the 'Remove Override' button.

The currently selected card is in override mode.
Please remove the current override before making any changes.
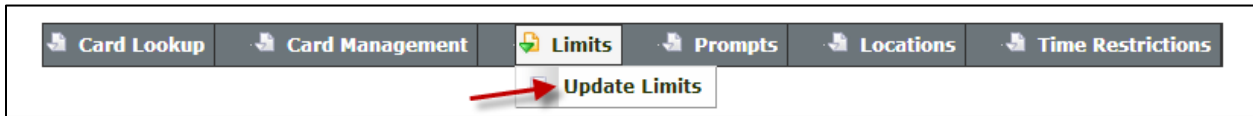
Remove Override

- When a card is in override no changes can be made to the card (i.e. status, add cash, etc.) therefore it is recommended that (1) one override/swipe be selected.

CHANGING A CARD'S PRODUCT LIMIT
"Select Program" > "Manage Cards" > "View/Update Cards"
- Look up the card by card #, Unit, Driver ID, Driver Name, X-Ref or Policy
- Select the card by clicking on the card number
- In the gray bar at the top of the screen Select "Limits" > "Update Limits"

- Under 'Limit', select 'Both'

- Click on 'Add Limit'

Source	Description	Amount	Measure Type	Hours	Auto Roll	Available
Policy	ADDITIVES	50 USD		0	Su Mo Tu We Th Fr Sa	50
Policy	CASH ADVANCE	300 USD		0	Su	100
Policy	DIESEL EXHAUST FLUID UREA	40 GAL		0	Su	40

- Select 'Product", select 'Next'
- Enter Amount
- Enter Hours (i.e. 24 equals daily) when to refresh the limit (typically this is left at 1)
- Select 'Finish'
- Delete the limit by selecting 'X' on the right side of the screen to delete

Source	Description	Amount	Measure Type	Hours	Auto Roll	Available	Edit	Delete
Card	AVIATION MERCHANDISE	10 USD		1		10		

NOTE: To change a limit for an entire policy, go to "Select Program" > "Manage Policy. Select the policy to add the product in the Policy Number. In the gray bar at the top of the screen select "Limits" > "Update Limits" and follow the same steps from above.

WEX Fleet One 24-Hour Customer Service: 800-359-7587