



**FLEET ONE**

**eManager Quick Reference Guide**  
**Card Management**

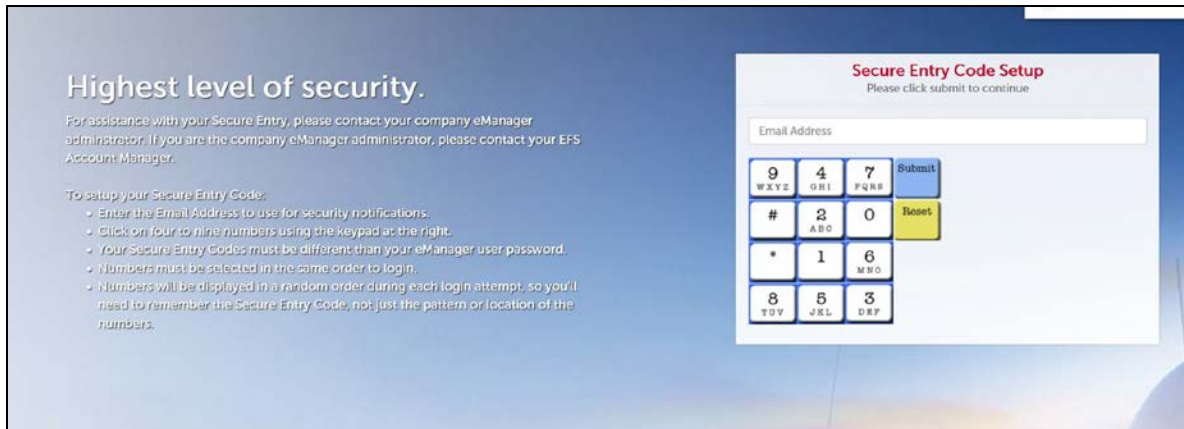
November 2017

## Log In:

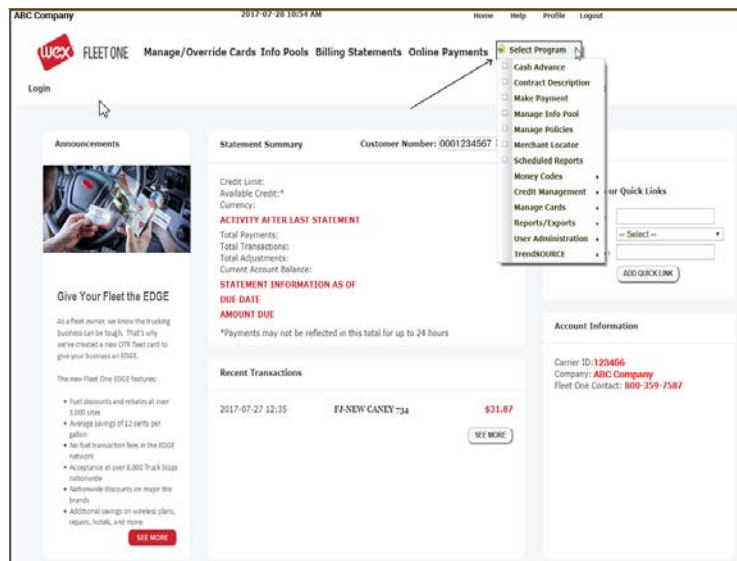
1. Go to <https://manage.fleetone.com>
2. Enter Carrier ID/Username and Password



3. Enter Secure Entry Code

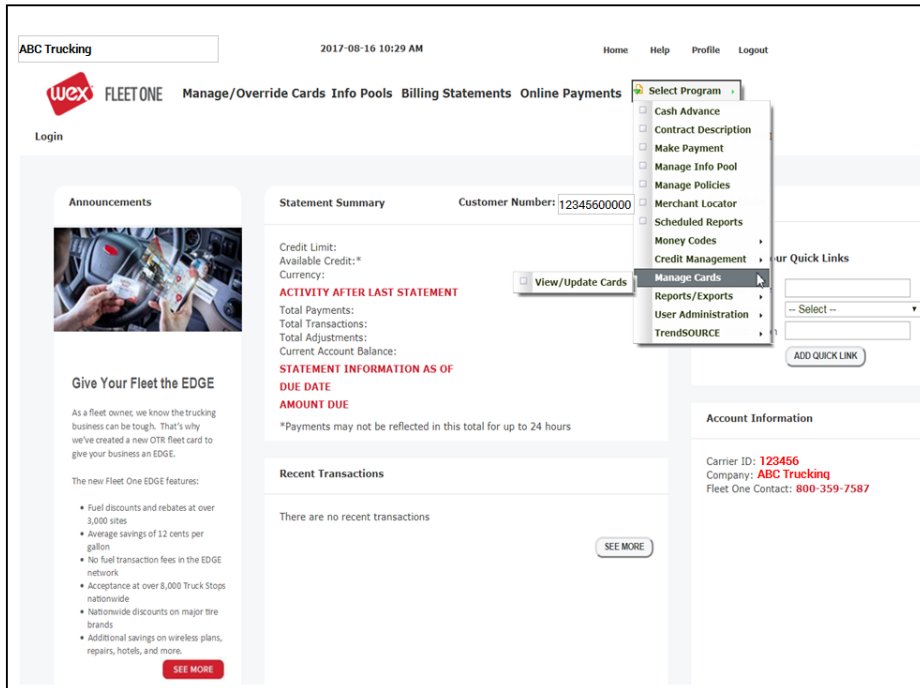


4. Once logged in, hover over 'SELECT PROGRAM' to see the menu of available options

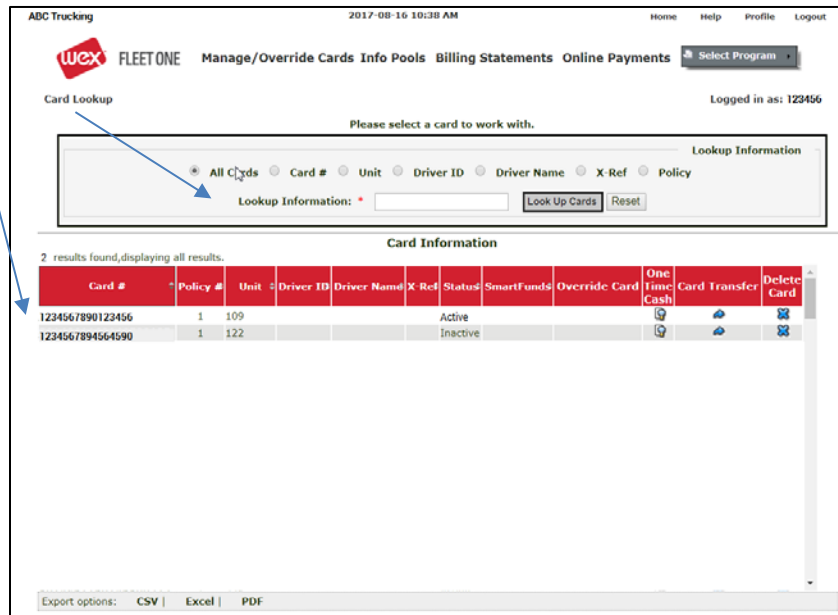


**Card Management:  
LOOK UP A CARD**

“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”

The screenshot shows the WEX FLEET ONE dashboard for ABC Trucking. The top navigation bar includes 'Home', 'Help', 'Profile', and 'Logout'. The main navigation menu has 'Manage/Override Cards', 'Info Pools', 'Billing Statements', and 'Online Payments'. A dropdown menu is open under 'Select Program', with 'Manage Cards' selected. Below this, 'View/Update Cards' is highlighted. The dashboard content includes a 'Statement Summary' for Customer Number 12345600000, showing credit limit, currency, and activity after the last statement. There is also a 'Recent Transactions' section and an 'Account Information' section with carrier and company details.

- 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

The screenshot shows the 'Card Lookup' interface. It prompts the user to 'Please select a card to work with.' and provides search options: 'All Cards', 'Card #', 'Unit', 'Driver ID', 'Driver Name', 'X-Ref', and 'Policy'. A search box is labeled 'Lookup Information: \*'. Below the search options is a table titled 'Card Information' with 2 results found. The table has columns for Card #, Policy #, Unit, Driver ID, Driver Name, X-Ref, Status, SmartFund, Override Card, One Time Cash, Card Transfer, and Delete Card. Two cards are listed: one active and one inactive.

Card #	Policy #	Unit	Driver ID	Driver Name	X-Ref	Status	SmartFund	Override Card	One Time Cash	Card Transfer	Delete Card
1234567890123456	1	109				Active					
1234567894564590	1	122				Inactive					

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

ABC Trucking 2017-08-16 11:05 AM Home Help Profile Logout

WEX FLEET ONE Manage/Override Cards Info Pools Billing Statements Online Payments Select Program

Card Prompt Detail Logged in as: 123456

Card # 1234567890123456 Last Transaction # -1 More Transactions... Rejections... Show Status History

Policy # 1- Card Status:  Active  Inactive  Hold Hand Enter:  Allow Hand Enter  Disallow Hand Enter  Policy Information:  Card  Policy  Both

Cross Reference (optional)

Second Line Embossing: Pioneer,OH Third Line Embossing: None

Save Reset Delete This Card Reset Pin

Add Prompt

Prompt Information (Both)

2 results found, displaying all results.

Source	Prompt	Validation	Value	Edit	Delete
Card	Unit Number	Report Only	220		
Policy	Odometer	Numeric			

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

ABC Trucking 2017-08-16 11:13 AM Home Help Profile Logout

WEX FLEET ONE Manage/Override Cards Info Pools Billing Statements Online Payments Select Program

Card Prompt Detail Logged in as: 123456

Card # 1234567890123456 Last Transaction # -1 More Transactions... Rejections... Show Status History

To assign the card click on **ADD PROMPT**.  
Click the prompt on the Prompt ID list.  
Click **NEXT** then choose the **VALIDATION**.

Add Prompt

Prompt ID: \* Billing ID  
Birthday  
Control Number  
Driver ID  
Driver License  
Driver License State  
Driver Name  
First Initial  
Hubometer  
Last Name

Next Cancel

- 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'

ABC Trucking 2017-08-16 11:25 AM Home Help Profile Logout

WEX FLEET ONE Manage/Override Cards Info Pools Billing Statements Online Payments Select Program

Card Prompt Detail Logged in as: 123456

Card # 1234567890123456 Last Transaction # -1 More Transactions... Rejections... Show Status History

Alpha = Letters  
Numeric = #s  
Report only = shows on reports but is not prompted.  
Exact Match = Driver must provide this EXACT information at the time of purchase

Add Prompt

Prompt ID: \* Trip Number  
Validation: \* Alpha  
Alpha-Numeric  
Numeric  
Report Only  
Exact Match

Next Back Cancel

- 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 \***

**Reference #**

**Note**

Jumpex Service

240 Characters Allowed

**Add Cash**

**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
<u>7083050030450</u>	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
<u>7083050030450</u>	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
<u>7083050030450</u>	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
<u>7083050030450</u>	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'

**Override Card**

# Card Overrides: 1

Location(s):  All Locations  Network Plus Optional Location

Optional:  Allow Hand Enter  Product/Limit Override

Buttons: Override Card, Cancel

- Select product to override and then 'Next'

**Add Limit**

Limit ID: \* **ULSD - ULTRA LOW SULFUR DIESEL**

Buttons: Next, Cancel

- 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

**Add Limit**

Limit ID: ULSD

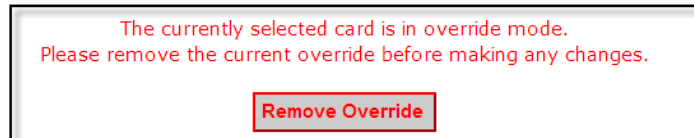
Amount: \*  GAL

Hours: \*

Buttons: Complete Override, Save and Add Another, Back, Cancel



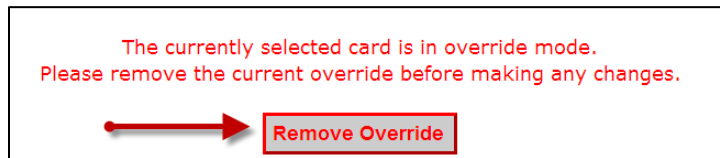
- The card will display to the screen with message that card is in override and a 'Remove Override' button displaying



- 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 does not '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.



- 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.

**VERRIDE FOR AN OUT-OF-NETWORK FUELING LOCATION – OR WAIT TIME**

“Select Program” > “Manage Cards” > “View/Update Cards”

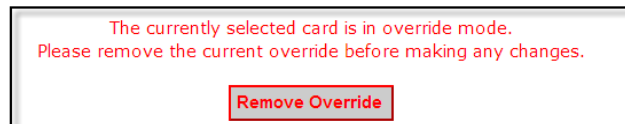
- Look up the card by card #, Unit, Driver ID, Driver Name, X-Ref or Policy
- Select 'Override Card' on the right side of the screen

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 screenshot shows the 'Override Card' dialog box. It has three main sections: '# Card Overrides' with a dropdown menu showing numbers 1 through 9; 'Location(s)' with radio buttons for 'All Locations' and 'Network Plus Optional Location', and a 'Lookup Location' button; and 'Optional' with checkboxes for 'Allow Hand Enter' and 'Product/Limit Override'. At the bottom, there are 'Override Card' and 'Cancel' buttons. Red boxes highlight the '# Card Overrides' dropdown, the 'All Locations' radio button, and the 'Override Card' button.

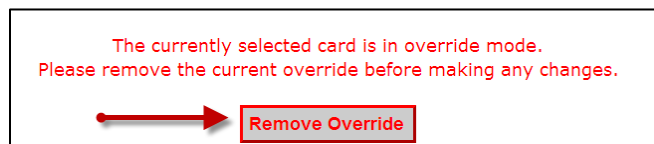
- The card will display to the screen with message that card is in override and a 'Remove Override' button displaying



- 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.

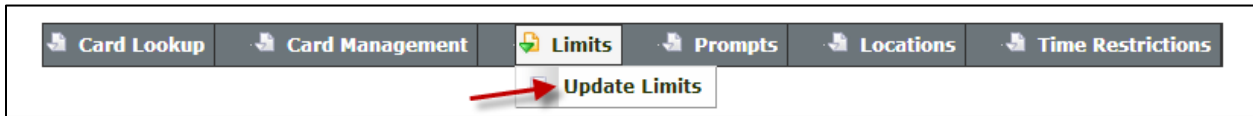


- When a card is in override no changes can be made to the card (i.e. status, add cash, etc.) therefore it is recommended that (1) one override/swipe be selected.

## 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'

The screenshot shows a form for card management. It includes fields for 'Policy #' (set to '5 - OWNER OPERATORS'), 'Cross Reference (optional)' (set to 'DON LAWRENCE'), and 'Second Line Embossing' (set to 'None'). There are three sections of radio buttons: 'Card Status' (Active, Inactive, Hold), 'Hand Enter' (Allow Hand Enter, Disallow Hand Enter, Policy), and 'Limit' (Card, Policy, Both). The 'Both' option under 'Limit' is selected. At the bottom right, there are buttons for 'Save', 'Reset', 'Delete This Card', and 'Reset Pin'.

- Click on 'Add Limit'

The screenshot shows a table titled 'Limits (Both)'. Above the table is an 'Add Limit' button with a red arrow pointing to it. Below the button, it says '9 results found, displaying all results.' The table has the following columns: Source, Description, Amount, Measure Type, Hours, Auto Roll, and Available. The data rows are:

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

The screenshot shows a single row in a table with the following columns: Source, Description, Amount, Measure Type, Hours, Auto Roll, Available, Edit, and Delete. The data for the row is:

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**