Welcome to Voyager FleetCommander Online!

U.S. Bank Voyager Fleet Systems Inc. welcomes you to FleetCommander Online, a web based fuel management program designed to provide you with complete access to monitor your Voyager account online. FleetCommander Online is an unparalleled tool that allows you to easily observe your fleet and gives you the information you need to successfully manage your account.

FleetCommander Online gives your company complete around-the-clock access to your company's data. With FleetCommander Online, you will be able to browse your account at any time to update and track vital information about your account, add drivers and vehicles, issue replacement cards and more– all conveniently online.

To learn more about the use of the program please proceed to the section that corresponds with the portion of the program in question.

Any feedback or suggestions for the FleetCommander Online manual are greatly appreciated! Please feel free to call 1-800-987-6591 and ask for Software Support, or email Fleetcommander@usbank.com.

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How to Log on to FleetCommander Online

Welcome to *Voyager FleetCommander Online!* Please follow these simple steps when logging on to the system.

1. At the Login prompt, type in your user id that was provided by Voyager (This is normally the user's first and middle initial followed by the first five characters of the user's last name. For example, Jane A Smith might be JASMITH).

2. At the Password prompt, type in your password.

3. Click the Submit button.

How to Log off *FleetCommander Online*

When you are finished with your session, you may exit the system using the following step.

Note: It does not matter which screen you are currently on when you log off the system.

1. Click the Logout>> link on the top left menu bar. This will end your session.

****Please note, inactivity of greater than 10 minutes will automatically log the user out when the next attempt to submit information is made.**

How to Look up Accounts

The left menu bar shows a link stating Account Lookup. Click this link to return to the Account Lookup screen at any time.

The user may search for an account by account number or account name.

Wildcards (*) are only allowed in the account name field. (Ex. - Voy*, Voyager Flee*, etc.)

How to Review Selected Account Details

The top of each screen shows a link displaying the selected account number and account name. Click this link to return to the Account Detail screen at any time. The link looks like this:

You are on account: xxxxx-xxxx|{Account Name}

The user may also access the Account Details page by clicking on the Account Details link beneath the menu on the left-most navigation pane on the screen.

The demo account on the next page displays all information that would normally be shown to a user on the Account Details page. Here the user may view all of the default information for the selected account.

You are on account: 86912-8405 | A & J ENTERPRISES

Account Details

Account Details

Account Id	86912-8405
Account Name	A & J ENTERPRISES
Open Date	6/5/2003
Expiration Date	6/30/2006
Bill Day	21
LOC	
Number of Active Cards	0
Last Card Id Issued	600003
Account Status	No special condition - Open Account
Account Flags	74 A0 A1 SP AL

Card Defaults

Company Selected PIN	Y	
Company Selected Vehicle	Y	
Company Selected Driver	Y	
Emboss Code	Vehicle License	
Restriction Code	Identification Number and Odometer; Fuel and Other	
Tie To	Vehicle	
Prompt	Driver	
#/Day	3	Hard/Soft S
#/Month		Hard/Soft
$/Month	1000	Hard/Soft S

Billing Address

ATTN CHRISTINA RODRIGUEZ
738 HWY 6 SOUTH STE 600
HOUSTON, TX77079-4042

Cancel

All cards will be ordered according to these defaults unless changes to the defaults are made per card on the Create Card pages. (The defaults may also be changed per card after the card is ordered by using the Edit Card function.)

If the user attempts to order a card that does not correspond with the Tie To account default, a red message will be shown as below.

Warning: You have selected a "Create a Card" option different from your account default. Your account is tied to _____. Proceeding with this page will result in a card issuance different from your existing cards.

To create a card based on your account defaults click here.

***Please note - This is only a warning message. You will still have the option to create cards any way you choose.**

How to Find a Card Address

The user may view the address that a card is sent to on any of the Maintain Card screens. The card address may only be changed on the Create Card + Driver, Create Card + Vehicle, Create Card Un-Tied, and Edit Card screens.

Use the following steps to find a Card Address:

1. **Click the**

button. A screen will appear showing the current Card Address options for your account. The user may click the <u>Select</u> link if the needed address is shown on screen or, if there are multiple addresses and you would like to narrow your search further, you may search by the City, State or Zip. In any of these fields, enter all (or a portion of) the appropriate data.

   Use any of these steps to search for the address:

   a. (Optional) Type in the address City (or a portion of the city followed by an asterisk).

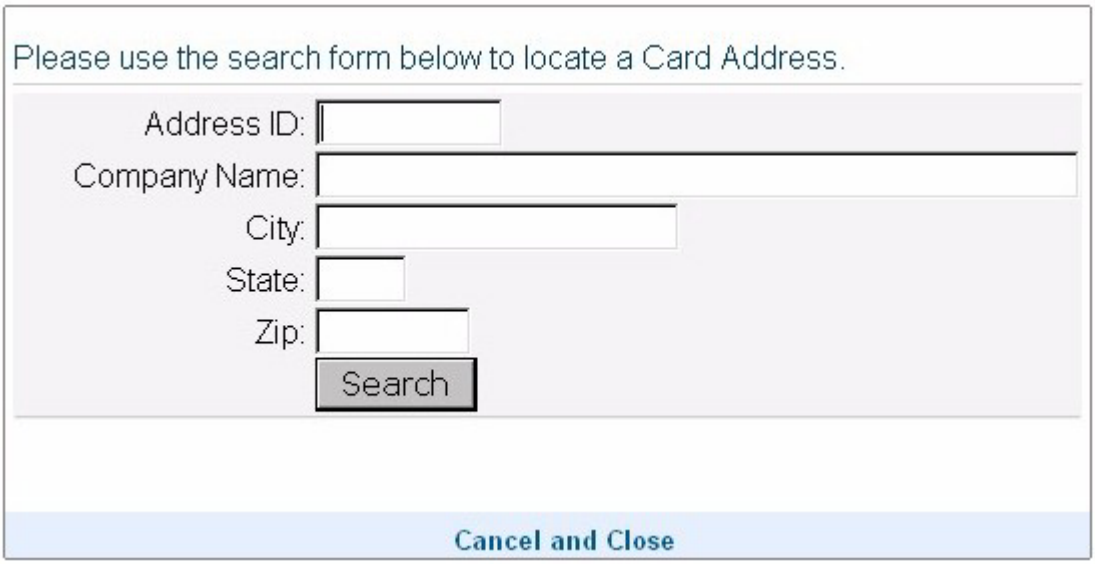
   b. (Optional) Type in the address State (or a portion of the state followed by an asterisk).

   c. (Optional) Type in the address Zip Code (or a portion of the zip code followed by an asterisk).

   Click the

button to search the system and display all available matching data.

The results set will appear as follows:



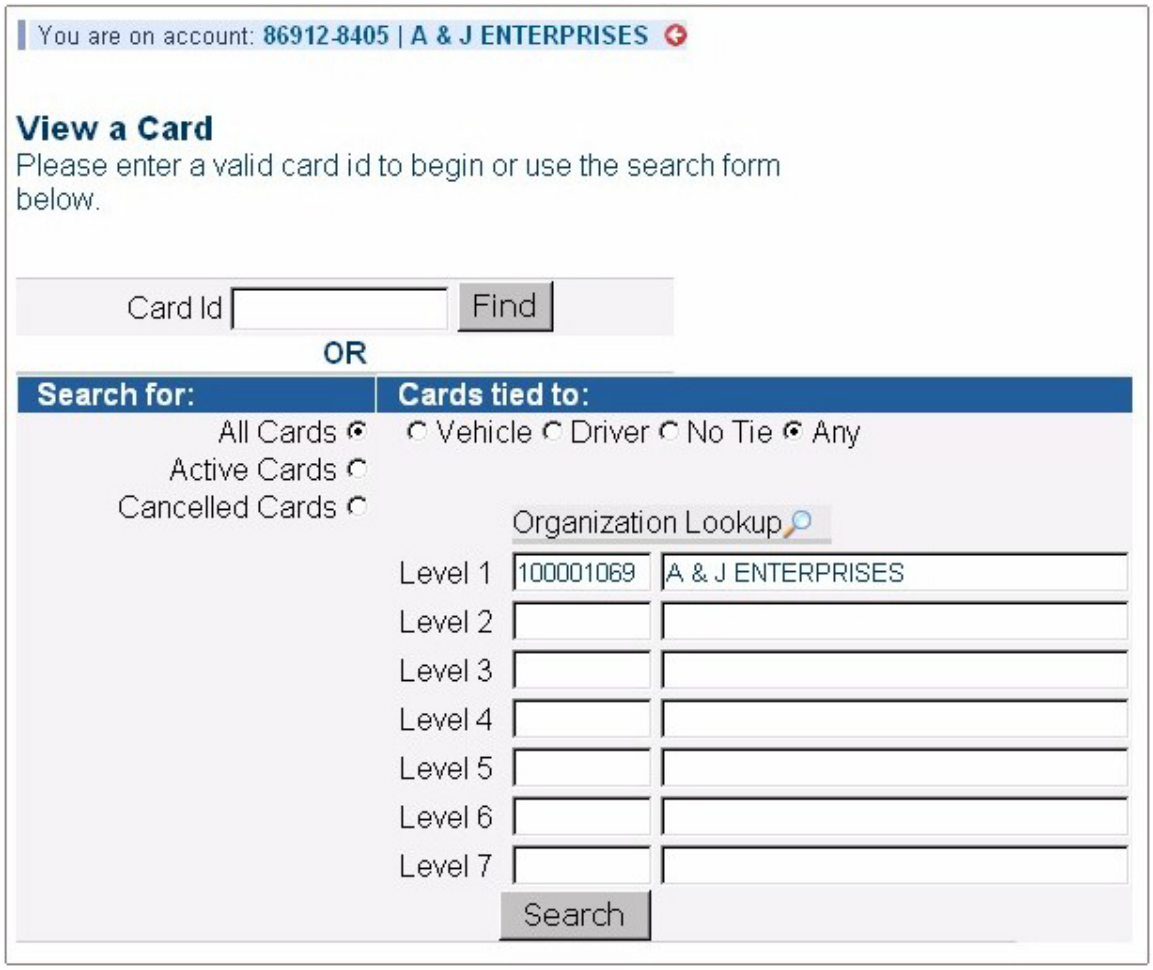
2. Select an address from the results by clicking the <u>Select</u> link. This will populate your Card Address screen with your selection.

How to View a Card

To View a Card, follow these steps.

1. Click on the View a Card function beneath the Maintain Cards>> menu on the left-most navigation pane on the screen.

2. Find the card you would like to view by using the search options provided.



There are two ways to search for a particular card.

1. **If the card ID number is known, the user may search by card ID number by following the steps below.**

   a. Click on the field next to Card Id and type in the Card Id beginning with the last digit of the expiration date of the account. (Ex. - account expires 0205, looking for card -00003. Card number entered would be 500003.)

   b. Click the

button to locate the card.

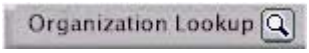
   c. Once the system locates a matching Card Id, the next screen will be populated with all available data.

2. If the card ID number is not known, the user may run a query by setting criteria to search all cards within their account.

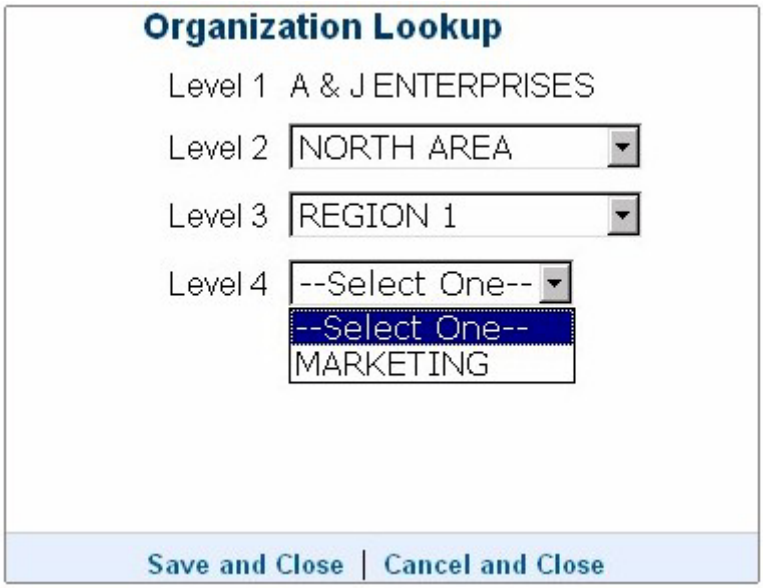
a. Select option of All Cards, Active Cards or Cancelled Cards to be shown (Default is All Cards)

b. Select option of cards that have a tie to vehicle, driver, no tie, or any (Default is Any)

c. Select Org Level(s) to view cards within if desired (Default is all cards under the Level 1 of your account)

By clicking on the 

button the user has the option to search for all cards tied to a particular organizational level if desired, by selecting levels from the drop down box as shown below.



The user will be shown a listing of the following:

- **Card Id number**
- **Whether the card is tied to Vehicle, Driver, or No Tie**
- **Card Status - This will be shown as Issued, Lost/Non Reissue, or New Card**
- **Issue Status - This will shown as Active or Pending**

3. View the choices and click the <u>Select</u> link in the left-most column to select the card. The next screen will be populated with all available data.

To View a different card while on the View a Card function

If you would like to change the selected card once you have chosen one, you have two options:

1. Enter a new Card Id in the box at the top of the screen labeled View Another Card and click the

button. This will re-populate the screen with the new card data.
-OR-
2. Click the View a Card link at far left navigation pane and begin again.

How to Create a Card + Vehicle

To Create a Card tied to a Vehicle, follow these steps.

1. Click on the Create a Card +Vehicle function beneath the Maintain Cards>> menu on the left-most navigation pane on the screen.

This feature allows you to add a card to the system with an associated Vehicle.

To add the card to the system with an associated vehicle, enter the required information on the screen and click either the Create button to add your card or the Cancel button to return to the Account Details page. Below is a detailed list of the information requested on this screen.

Card Address

The card address section features an Address Lookup button to assist you in finding the correct address for this card. Click the Address Lookup button to find the appropriate address. For help in finding your card address click here. Once you have selected your card address, the following fields will be pre-populated with your selection. These fields are not editable:

- **Company Name**
- **ATTN**
- **Street**
- **City, State, Zip, Zip+4**
- **Business Phone**

Vehicle Information

- **Vehicle Id**
- **License Number**
- **State**
- **VIN**
- **Vehicle Description**

Card Organizations

The card organizations can be selected using the Organization Lookup icon. Click this icon next to the fields labeled Level 1 - Level 7 to choose up to seven levels of organizations for the selected card.

Card User Codes

Up to five card user codes can be manually entered using the text boxes next to the fields labeled Code1 - Code5

Card Prompts

If the driver is linked to a card, the Card Prompts information will display. Card Prompts allow you to set options to prompt the driver at the pump.

Choices are:

- **No prompt - driver is not prompted for any additional information at the pump**
- **Prompt for Driver - Driver is prompted for Driver Id at the pump**
- **Prompt for PIN - Driver is prompted for PIN**

  Note *If the Prompt for PIN option is chosen, PIN must be entered in the corresponding PIN field.

The next choice is an additional prompt for the driver at the pump.

- **Prompt for Odometer - choose this option if you would like the driver to be prompted for the odometer reading at the pump.**

The next choice sets the default for the types of purchase the driver is permitted to make using this card.

- **Fuel and Other - allows the driver to purchase fuel in addition to other saleable items (oil, maintenance, food, drinks, reading materials etc.)**
- **Fuel Only - limits the drivers purchases to fuel only. No other items are permitted.**

Card Limits

The card limits section sets defaults for transactions and dollars.
Enter a number in the Transactions Per Day box to limit the number of card transactions the driver can make in any calendar day. Click either the Hard or Soft selection.

Enter a dollar amount in the Dollars Per Month box to limit the amount of money the driver can spend using this card each calendar month. Click either the Hard or Soft selection.

Enter a number in the Transactions Per Month to limit the number of card transactions the driver can make using this card each calendar month. Click either the Hard or Soft selection.

***Account Defaults may pre-determine these fields, but changes may be made as necessary.**

Standard Exceptions - Fuel/Product Exceptions

You may select the type of fuel/products that are supposed to be purchased for a particular card/vehicle under the section titled Fuel/Product Exceptions.

***Please note - These settings will not prevent the driver from purchasing other types of products, but the transactions will be shown in an Exception report sent out with your normal Voyager billing.**

To set these restrictions you will first need to obtain the two digit code for the product that you are setting. (Ex. - 01=Unleaded, 05=Diesel, etc.) If you do not know the proper code or would like a complete listing of all product codes please contact a Voyager client services representative at 1-800-987-6591.

Once you have the needed information you may enter up to two Valid Products that may be purchased for that particular vehicle in the Valid Product 1 and Valid Product 2 fields respectively.

The capacity that the vehicle is expected to hold of each product may be entered in the Capacity 1 and Capacity 2 fields.

The Units Per Gallon would need to be filled in the user chooses to document the amount of units (Ex. - Miles/Kilos) that are to be used per gallon of fuel.

The Units Of Measure would need to be filled in to correspond with the Units Per Gallon. In the Units Of Measure field the user will need to enter Miles or Kilos as the measurement of units.

The % Variance field is the variance range of the amount over what has specified that can be purchased. (Ex. - You have a vehicle set up to show that it can hold 30.0 gallons of fuel. You set the variance to be 10%. This means the transaction will be flagged if the user purchases greater than 33.0 gallons.)

Standard Exceptions - Card Purchase Restrictions

You may also choose to limit the purchases for the driver of this vehicle using Valid Purchase Days and Valid Purchase Time.

Choose one of the following options for Valid Purchase Days

- **Can Purchase 7 Days a Week**
- **Can Purchase Monday - Friday**
- **Can Purchase on Saturday**
- **Can Purchase on Sunday**
- **Can Purchase Monday - Saturday**
- **Can Purchase Monday - Friday and Sunday**
- **Can Purchase on Saturday and Sunday**

Select either All or Specific Range to choose Valid Purchase Time for this vehicle. Make sure to choose a valid daily start time and a valid daily ending time for purchases including AM or PM.

All cards will be ordered according to Account Defaults unless changes to the defaults are made per card on the Create Card pages. If the user attempts to order a card that does not correspond with the account defaults, a red message will be shown as below.

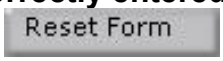
Warning: You have selected a "Create a Card" option different from your account default. Your account is tied to _____. Proceeding with this page will result in a card issuance different from your existing cards.

To create a card based on your account defaults click here.

This is only a warning message. You will still have the option to create cards any way you choose.

To create Card + Vehicle click the

at the bottom of the page. You will then be asked to confirm with the message box appearing asking "Are you sure?". If all information is correct click "OK". If changes need to be made, click "No" and you will be taken back to the information previously entered on the Create Card + Vehicle screen.

If there is information that was incorrectly entered and you would like to start the process over, click on the 

button. This will clear all information on the screen that the user has entered.

How to Create a Card + Driver

To Create a Card tied to a Driver, follow these steps.

1. Click on the Create a Card +Driver function beneath the Maintain Cards>> menu on the left-most navigation pane on the screen.

This feature allows you to add a card to the system with an associated Driver.

To add the card to the system with an associated driver, enter the required information on the screen and click either the [Create] button to add your card or the [Cancel] button to return to the previous screen. Below is a detailed list of the information requested on this screen.

Card Address

The card address section features an [Address Lookup] button to assist you in finding the correct address for this card. Click the [Address Lookup] button to find the appropriate address. For help in finding your card address click here. Once you have selected your card address, the following fields will be pre-populated with your selection. These fields are not editable:

- **Company Name**
- **ATTN**
- **Street**
- **City, State, Zip, Zip+4**
- **Business Phone**

Driver Information

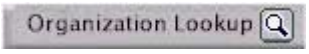
This section contains driver information, some of which can be updated and some static information for display purposes only.
The following data may not be updated.

- **Driver Id**
- **Status**
- **Status Date**
-

You may update the following information for this driver by clicking in the box to each of the following labels:

- **First Name**
- **MI (Middle Initial)**
- **Last Name**

Card Organizations

The card organizations can be selected using the 

icon. Click this icon next to the fields labeled Level 1 - Level 7 to choose up to seven levels of organizations for the selected card.

Card User Codes

Up to five card user codes can be manually entered using the text boxes next to the fields labeled Code1 - Code5

Card Prompts

If the driver is linked to a card, the Card Prompts information will display. Card Prompts allow you to set options to prompt the driver at the pump.

Choices are:

- **No prompt - driver is not prompted for any additional information at the pump**
- **Prompt for Driver - Driver is prompted for Driver Id at the pump**
- **Prompt for PIN - Driver is prompted for PIN**

  Note *If the Prompt for PIN option is chosen, PIN must be entered in the corresponding PIN field.

The next choice is an additional prompt for the driver at the pump.

- **Prompt for Odometer - choose this option if you would like the driver to be prompted for the odometer reading at the pump.**

The next choice sets the default for the types of purchase the driver is permitted to make using this card.

- **Fuel and Other - allows the driver to purchase fuel in addition to other saleable items (oil, maintenance, food, drinks, reading materials etc.)**
- **Fuel Only - limits the drivers purchases to fuel only. No other items are permitted.**

Card Limits

The card limits section sets defaults for transactions and dollars.
Enter a number in the Transactions Per Day box to limit the number of card transactions the driver can make in any calendar day. Click either the Hard or Soft selection.
Enter a dollar amount in the Dollars Per Month box to limit the amount of money the driver can spend using this card each calendar month.

Click either the Hard or Soft selection.

Enter a number in the Transactions Per Month to limit the number of card transactions the driver can make using this card each calendar month.
Click either the Hard or Soft selection.

***Account Defaults may pre-determine these fields, but changes may be made as necessary.**

Standard Exceptions

You may choose to limit the purchases for the driver of this vehicle using Valid Purchase Days and Valid Purchase Time.

Choose one of the following options for Valid Purchase Days

- **Can Purchase 7 Days a Week**
- **Can Purchase Monday - Friday**
- **Can Purchase on Saturday**
- **Can Purchase on Sunday**
- **Can Purchase Monday - Saturday**
- **Can Purchase Monday - Friday and Sunday**
- **Can Purchase on Saturday and Sunday**

Select either All or Specific Range to choose Valid Purchase Time for this vehicle. Make sure to choose a valid daily start time and a valid daily ending time for purchases including AM or PM.

All cards will be ordered according to Account Defaults unless changes to the defaults are made per card on the Create Card pages. If the user attempts to order a card that does not correspond with the account defaults, a red message will be shown as below.

Warning: You have selected a "Create a Card" option different from your account default. Your account is tied to _____. Proceeding with this page will result in a card issuance different from your existing cards.

To create a card based on your account defaults click here.

This is only a warning message. You will still have the option to create cards any way you choose.

To create Card + Driver click the

at the bottom of the page. You will then be asked to confirm with the message box appearing asking "Are you sure?". If all information is correct click "OK". If changes need to be made, click "No" and you will be taken back to the information previously entered on the Create Card + Driver screen.

If there is information that was incorrectly entered and you would like to start the process over, click on the Reset Form button. This will clear all information on the screen that the user has entered.

How to Create a Card Un-Tied

To Create a Card Un-Tied, follow these steps.

1. Click on the Create a Card Un-Tied function beneath the Maintain Cards>> menu on the left-most navigation pane on the screen. .

This feature allows you to add a card to the system without an associated driver or vehicle.

To add the card to the system, enter the required information on the screen and click either the Create button to add your card without an associated driver and vehicle or the Cancel button to return to the previous screen. Below is a detailed list of the information requested on this screen.

Card Address

The card address section features an Address Lookup button to assist you in finding the correct address for this card. Click the Address Lookup button to find the appropriate address. For help in finding your card address click here. Once you have selected your card address, the following fields will be pre-populated with your selection. These fields are not editable:

- **Company Name**
- **ATTN**
- **Street**
- **City, State, Zip, Zip+4**
- **Business Phone**

Card Organizations

The card organizations can be selected using the Organization Lookup icon. Click this icon next to the fields labeled Level 1 - Level 7 to choose up to seven levels of organizations for the selected card.

Card User Codes

Up to five card user codes can be manually entered using the text boxes next to the fields labeled Code1 - Code5

Card Prompts

If the driver is linked to a card, the Card Prompts information will display. Card Prompts allow you to set options to prompt the driver at the pump.

Choices are:

- **No prompt - driver is not prompted for any additional information at the pump**
- **Prompt for Driver - Driver is prompted for Driver Id at the pump**
- **Prompt for PIN - Driver is prompted for PIN**

Note *If the Prompt for PIN option is chosen, PIN must be entered in the corresponding PIN field.

The next choice is an additional prompt for the driver at the pump.

- **Prompt for Odometer - choose this option if you would like the driver to be prompted for the odometer reading at the pump.**

The next choice sets the default for the types of purchase the driver is permitted to make using this card.

- **Fuel and Other - allows the driver to purchase fuel in addition to other saleable items (oil, maintenance, food, drinks, reading materials etc.)**
- **Fuel Only - limits the drivers purchases to fuel only. No other items are permitted.**

Card Limits

The card limits section sets defaults for transactions and dollars.
Enter a number in the Transactions Per Day box to limit the number of card transactions the driver can make in any calendar day. Click either the Hard or Soft selection.

Enter a dollar amount in the Dollars Per Month box to limit the amount of money the driver can spend using this card each calendar month. Click either the Hard or Soft selection.

Enter a number in the Transactions Per Month to limit the number of card transactions the driver can make using this card each calendar month. Click either the Hard or Soft selection.

***Account Defaults may pre-determine these fields, but changes may be made as necessary.**

All cards will be ordered according to Account Defaults unless changes to the defaults are made per card on the Create Card pages. If the user attempts to order a card that does not correspond with the account defaults, a red message will be shown as below.

Warning: You have selected a "Create a Card" option different from your account default. Your account is tied to _____. Proceeding with this page will result in a card issuance different from your existing cards.

To create a card based on your account defaults click here.

This is only a warning message. You will still have the option to create cards any way you choose.

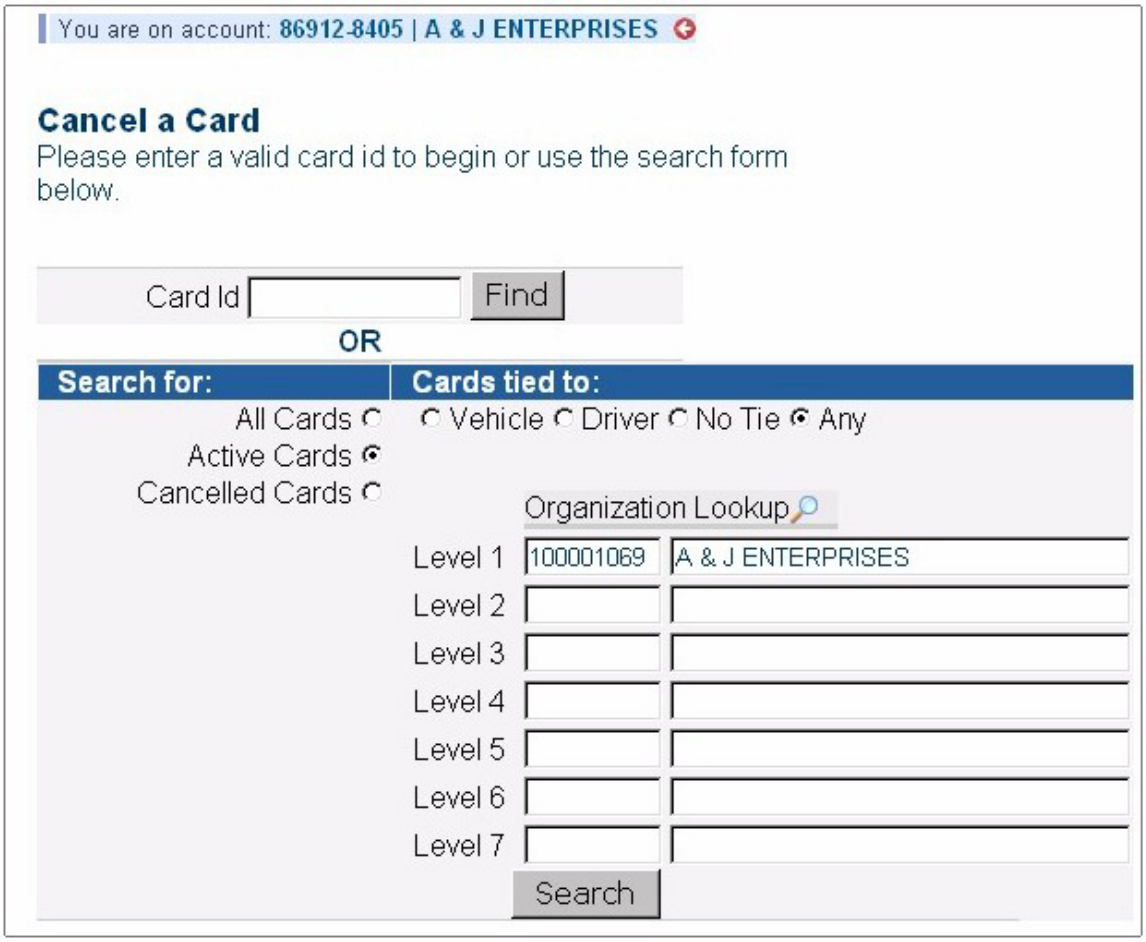
To create Card Un-Tied click the Create **at the bottom of the page. You will then be asked to confirm with the message box appearing asking "Are you sure?". If all information is correct click "OK". If changes need to be made, click "No" and you will be taken back to the information previously entered on the Create Card Un-Tied screen.**

If there is information that was incorrectly entered and you would like to start the process over, click on the Reset Form **button. This will clear all information on the screen that the user has entered.**

How to Cancel a Card

To Cancel a Card, follow these instructions:

1. Choose the Cancel a Card function beneath the Maintain Cards>> menu on the left-most navigation pane on the screen.
2. Find the card you would like to cancel by using the search options provided.



There are two ways to search for a particular card.

1. If the card ID number is known, the user may search by card ID number by following the steps below.

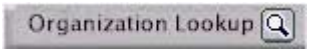
- **a. Click on the field next to Card Id and type in the Card Id beginning with the last digit of the expiration date of the account. (Ex. - account expires 0205, looking for card -00003. Card number entered would be 500003.)**
- **b. Click the Find button to locate the card.**
- **c. Once the system locates a matching Card Id, the next screen will be populated with all available data.**

2. If the card ID number is not known, the user may run a query by setting criteria to search all cards within their account.

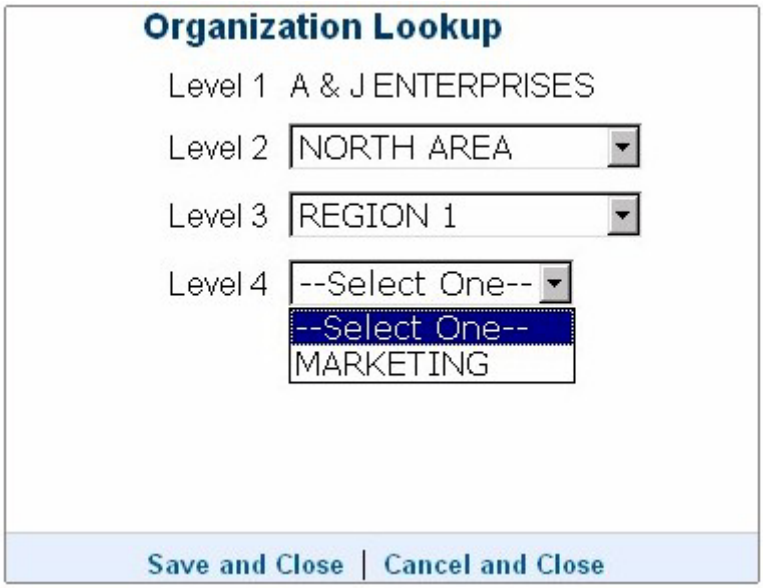
a. Select option of All Cards, Active Cards or Cancelled Cards to be shown (Default is Active Cards)

b. Select option of cards that have a tie to vehicle, driver, no tie, or any (Default is Any)

c. Select Org Level(s) to view cards within if desired (Default is all cards under the Level 1 of your account)

By clicking on the 

button the user has the option to search for all cards tied to a particular organizational level if desired, by selecting levels from the drop down box as shown below.



The user will be shown a listing of the following:

- **Card Id number**
- **Whether the card is tied to Vehicle, Driver, or No Tie**
- **Card Status - This will be shown as Issued, Lost/Non Reissue, or New Card**
- **Issue Status - This will shown as Active or Pending**

3. View the choices and click the <u>Select</u> link in the left-most column to select the card. The next screen will be populated with all available data. Once you have selected the card you will be presented with the screen pre-populated with the selected card information.

Review the card information and click the Cancel Card button to cancel the selected card. Once the Cancel Card button is clicked you will be prompted to confirm your choice.

To Cancel a different card while on the Cancel a Card function

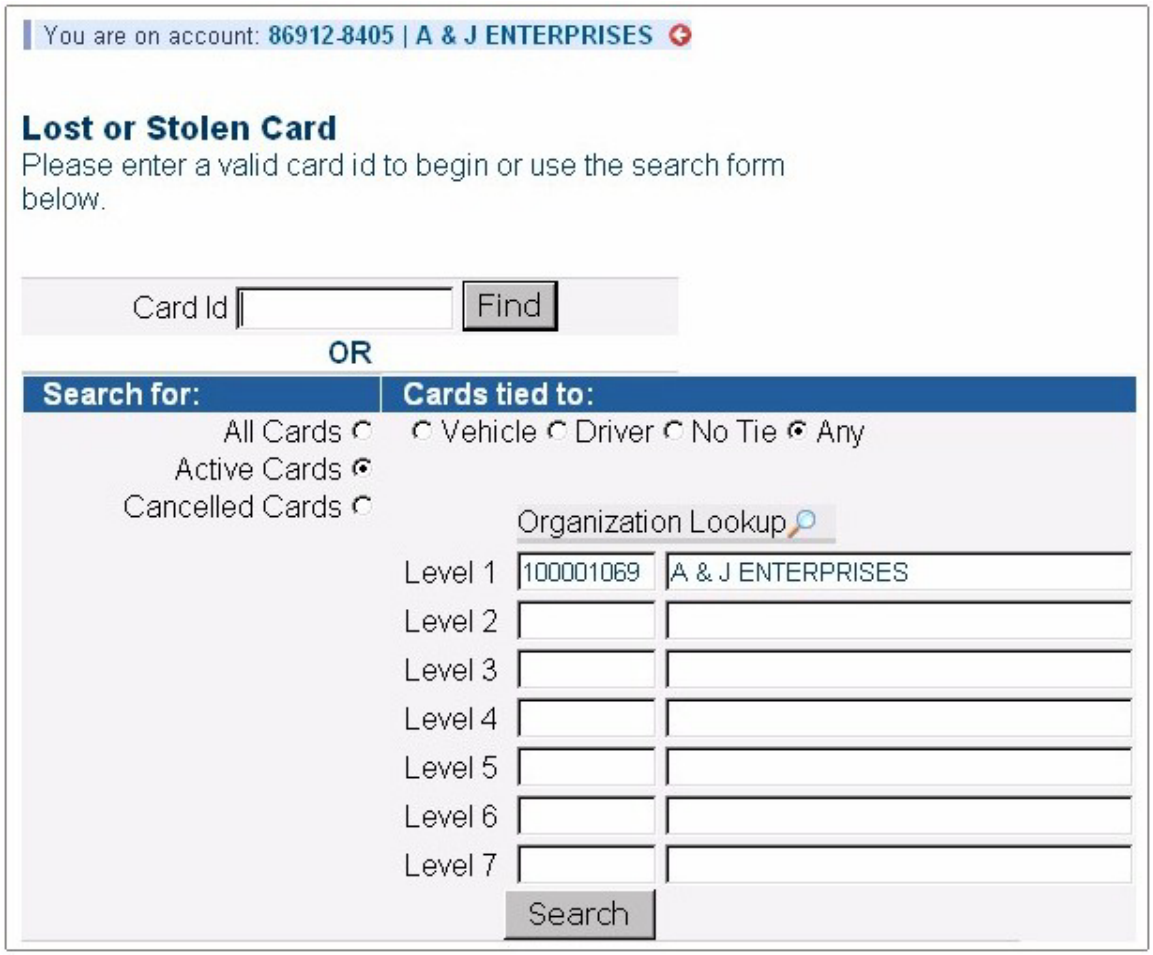
If you would like to change the selected card once you have chosen one, you have two options:

1. Enter a new Card Id in the box at the top of the screen labeled Cancel Another Card and click the Find button. This will re-populate the screen with the new card data.
-OR-
2. Click the Cancel a Card link at far left navigation pane and begin again.

How to Handle a Lost/Stolen Card

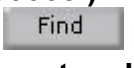
To Cancel a Lost/Stolen Card, follow these instructions:

1. Choose the Lost/Stolen Card function beneath the Maintain Cards>> menu on the left-most navigation pane on the screen.
2. Find the card you would like to cancel and reissue by using the search options provided.



There are two ways to search for a particular card.

1. If the card ID number is known, the user may search by card ID number by following the steps below.

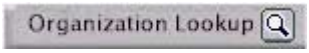
- **a. Click on the field next to Card Id and type in the Card Id beginning with the last digit of the expiration date of the account. (Ex. - account expires 0205, looking for card -00003. Card number entered would be 500003.)**
- **b. Click the**  **button to locate the card.**
- **c. Once the system locates a matching Card Id, the next screen will be populated with all available data.**

2. If the card ID number is not known, the user may run a query by setting criteria to search all cards within their account.

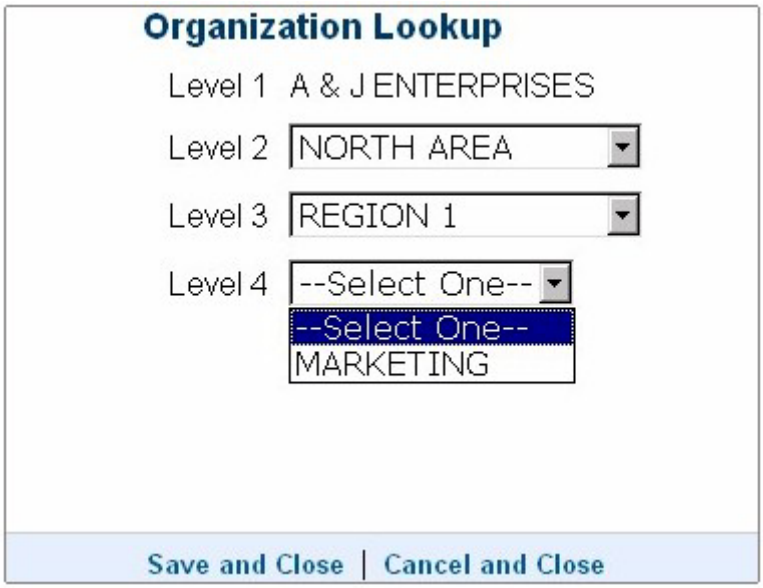
a. Select option of All Cards, Active Cards or Cancelled Cards to be shown (Default is Active Cards)

b. Select option of cards that have a tie to vehicle, driver, no tie, or any (Default is Any)

c. Select Org Level(s) to view cards within if desired (Default is all cards under the Level 1 of your account)

By clicking on the 

button the user has the option to search for all cards tied to a particular organizational level if desired, by selecting levels from the drop down box as shown below.



The user will be shown a listing of the following:

- **Card Id number**
- **Whether the card is tied to Vehicle, Driver, or No Tie**
- **Card Status - This will be shown as Issued, Lost/Non Reissue, or New Card**
- **Issue Status - This will shown as Active or Pending**

3. View the choices and click the <u>Select</u> link in the left-most column to select the card. The next screen will be populated with all available data. Once you have selected the card you will be presented with the screen pre-populated with the selected card information.

Review the card information and click the Lost or Stolen card button to cancel and reissue the selected card. Once the Lost or Stolen card button is clicked you will be prompted to confirm your choice.

To Cancel and Reissue a different card while on the Lost/Stolen a Card function

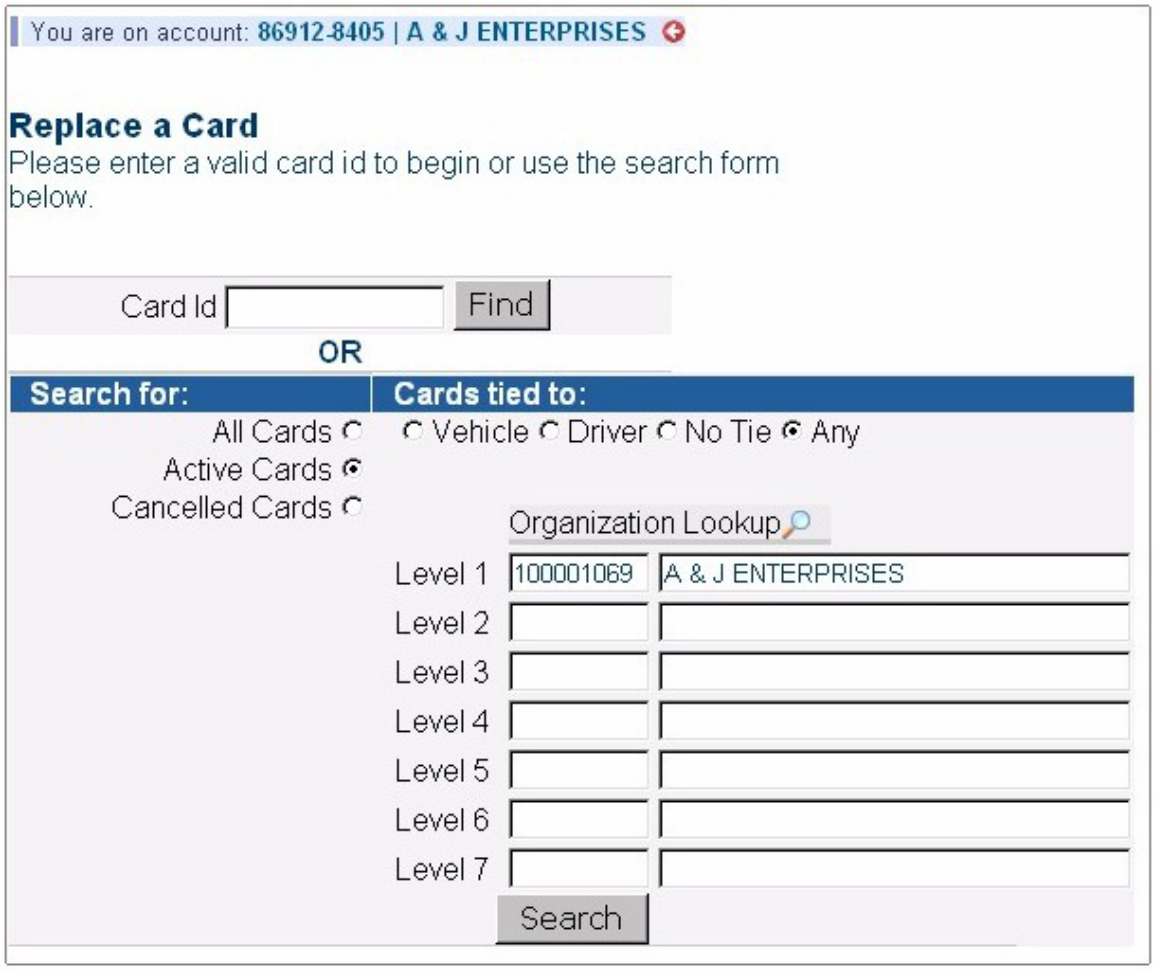
If you would like to change the selected card once you have chosen one, you have two options:

1. Enter a new Card Id in the box at the top of the screen labeled Cancel Another Card and click the Find button. This will re-populate the screen with the new card data.
-OR-
2. Click the Lost/Stolen Card link at far left navigation pane and begin again.

How to Replace a Card

To Replace a Card, follow these instructions:

1. Choose the Replace a Card function beneath the Maintain Cards>> menu on the left-most navigation pane on the screen.
2. Find the card you would like to replace by using the search options provided.



There are two ways to search for a particular card.

1. If the card ID number is known, the user may search by card ID number by following the steps below.

a. Click on the field next to Card Id and type in the Card Id beginning with the last digit of the expiration date of the account. (Ex. - account expires 0205, looking for card -00003. Card number entered would be 500003.)

b. Click the

button to locate the card.

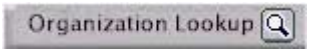
c. Once the system locates a matching Card Id, the next screen will be populated with all available data.

2. If the card ID number is not known, the user may run a query by setting criteria to search all cards within their account.

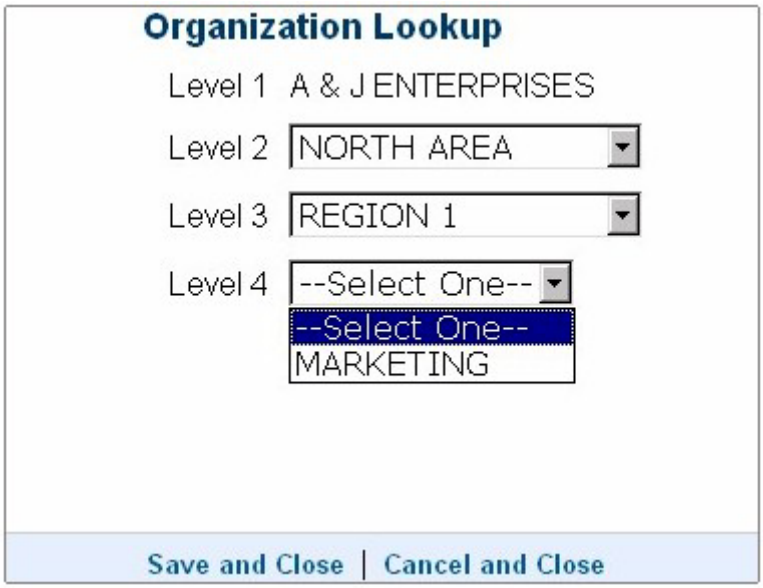
a. Select option of All Cards, Active Cards or Cancelled Cards to be shown (Default is Active Cards)

b. Select option of cards that have a tie to vehicle, driver, no tie, or any (Default is Any)

c. Select Org Level(s) to view cards within if desired (Default is all cards under the Level 1 of your account)

By clicking on the 

button the user has the option to search for all cards tied to a particular organizational level if desired, by selecting levels from the drop down box as shown below.



The user will be shown a listing of the following:

- **Card Id number**
- **Whether the card is tied to Vehicle, Driver, or No Tie**
- **Card Status - This will be shown as Issued, Lost/Non Reissue, or New Card**
- **Issue Status - This will shown as Active or Pending**

3. View the choices and click the <u>Select</u> link in the left-most column to select the card. The next screen will be populated with all available data. Once you have selected the card you will be presented with the screen pre-populated with the selected card information.

Review the card information and click the Replace button to Replace the selected card or the Cancel to return to the previous screen. Once the Replace button is clicked you will be prompted to confirm your choice.

To Replace another card while on the Replace a Card function

If you would like to change the selected card once you have chosen one, you have two options:

1. Enter a new Card Id in the box at the top of the screen labeled Replace Another Card and click the Find button. This will re-populate the screen with the new card data.
-OR-
2. Click the Replace a Card link at far left navigation pane and begin again.

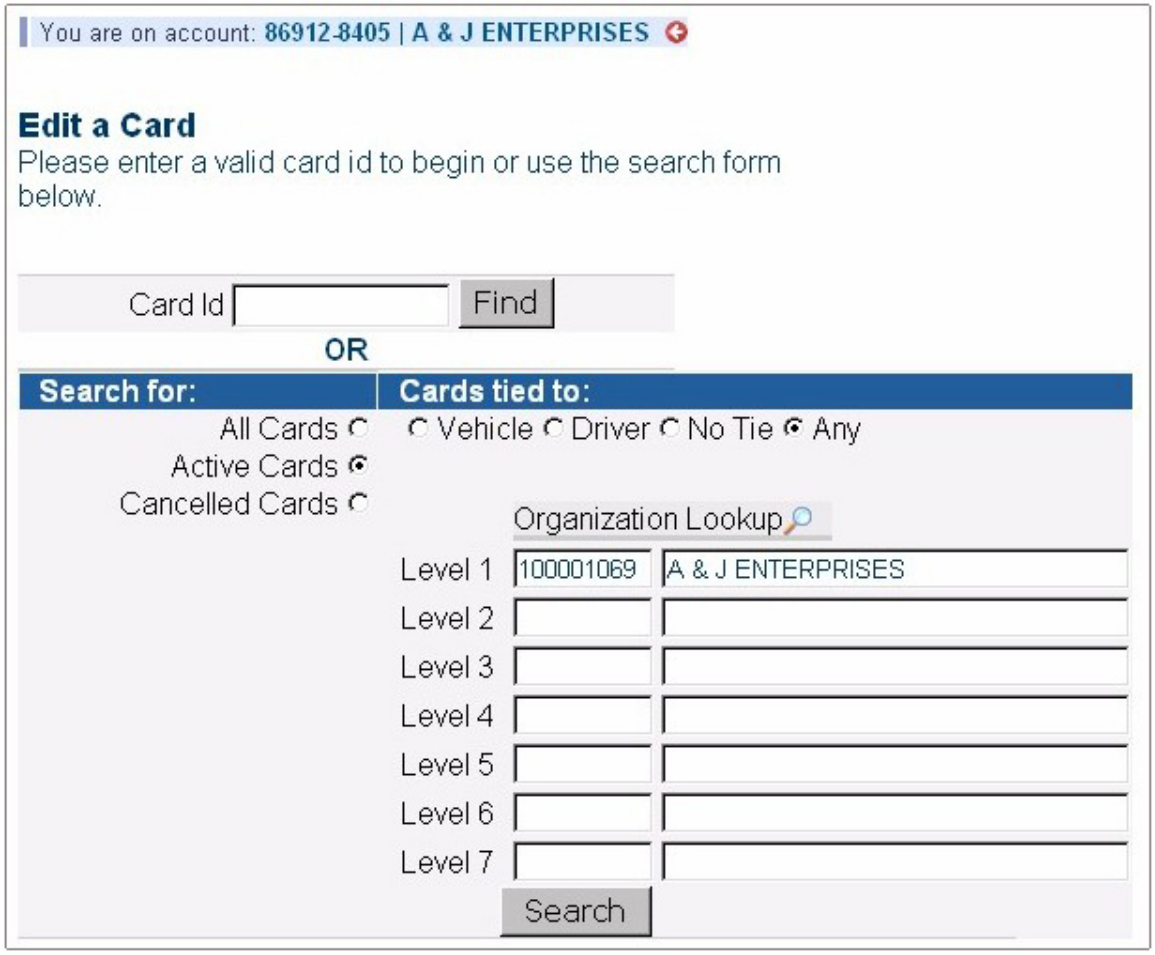
How to Edit a Card

To Edit a Card, follow these instructions:

1. Choose the Edit a Card function beneath the Maintain Cards>> menu on the left-most navigation pane on the screen.

2. Find the card you would like to edit by using the search options provided.
Once you have selected the card you will be presented with the screen pre-populated with the selected card data.

3. After you have made your changes, click the Save Changes button to save your work, or click the Reset Form button to clear all your entries and begin again. Listed on the next page is a detailed list of the information requested on this screen.



There are two ways to search for a particular card.

1. If the card ID number is known, the user may search by card ID number by following the steps below.

a. Click on the field next to Card Id and type in the Card Id beginning with the last digit of the expiration date of the account. (Ex. - account expires 0205, looking for card -00003. Card number entered would be 500003.)

b. Click the

button to locate the card.

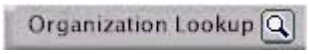
c. Once the system locates a matching Card Id, the next screen will be populated with all available data.

2. If the card ID number is not known, the user may run a query by setting criteria to search all cards within their account.

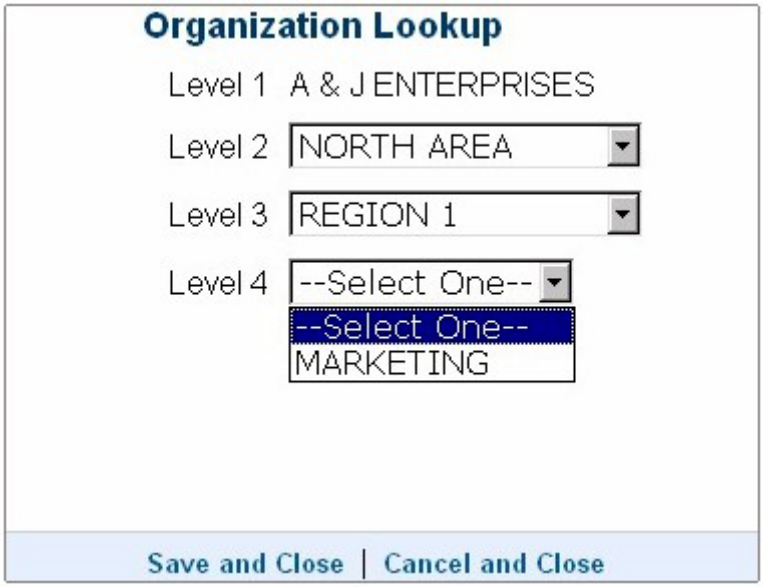
a. Select option of All Cards, Active Cards or Cancelled Cards to be shown (Default is Active Cards)

b. Select option of cards that have a tie to vehicle, driver, no tie, or any (Default is Any)

c. Select Org Level(s) to view cards within if desired (Default is all cards under the Level 1 of your account)

By clicking on the 

button the user has the option to search for all cards tied to a particular organizational level if desired, by selecting levels from the drop down box as shown below.



The user will be shown a listing of the following:

- **Card Id number**
- **Whether the card is tied to Vehicle, Driver, or No Tie**
- **Card Status - This will be shown as Issued, Lost/Non Reissue, or New Card**
- **Issue Status - This will shown as Active or Pending**

3. View the choices and click the Select link in the left-most column to select the card. The next screen will be populated with all available data. From here you can view and update card information. See the next page for a detailed explanation of the information on this screen.

Card Address

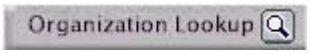
The card address section features an

button to assist you in finding the correct address for this card. Click the

button to find the appropriate address. For help in finding your card address click here. Once you have selected your card address, the following fields will be pre-populated with your selection. These fields are not editable:

- **Company Name**
- **ATTN**
- **Street**
- **City, State, Zip, Zip+4**
- **Business Phone**

Card Organizations

The card organizations can be selected using the 

icon. Click this icon next to the fields labeled Level 1 - Level 7 to choose up to seven levels of organizations for the selected card.

Card User Codes

Up to five card user codes can be manually entered using the text boxes next to the fields labeled Code1 - Code5

Card Prompts

Card Prompts allow you to set options to prompt the driver at the pump.

Choices are:

- **No prompt - driver is not prompted for any additional information at the pump**
- **Prompt for Driver - Driver is prompted for Driver Id at the pump**
- **Prompt for PIN - Driver is prompted for PIN**

Note *If the Prompt for PIN option is chosen, PIN must be entered in the corresponding PIN field.

The next choice is an additional prompt for the driver at the pump.

- **Prompt for Odometer - choose this option if you would like the driver to be prompted for the odometer reading at the pump.**

The next choice sets the default for the types of purchase the driver is permitted to make using this card.

- **Fuel and Other - allows the driver to purchase fuel in addition to other saleable items (food, drinks, reading materials, oil and maintenance etc.)**
- **Fuel Only - limits the drivers purchases to fuel only. No other items are permitted.**

Card Limits

The card limits section sets defaults for transactions and dollars.
Enter a number the Transactions Per Day box to limit the number of card transactions the driver can make in any calendar day. Click either the Hard or Soft selection.
Enter a dollar amount in the Dollars Per Month box to limit the amount of money the driver can spend using this card each calendar month. Click either the Hard or Soft selection.
Enter a number in the Transactions Per Month to limit the number of card transactions the driver can make using this card each calendar month Click either the Hard or Soft selection.

Standard Exceptions

You may choose to limit the purchases for the driver of this vehicle using Valid Purchase Days and Valid Purchase Time.

Choose one of the following options for Valid Purchase Days

- **Can Purchase 7 Days a Week**
- **Can Purchase Monday - Friday**
- **Can Purchase on Saturday**
- **Can Purchase on Sunday**
- **Can Purchase Monday - Saturday**
- **Can Purchase Monday - Friday and Sunday**
- **Can Purchase on Saturday and Sunday**

Select either All or Specific Range to choose Valid Purchase Time for this vehicle. Make sure to choose a valid daily start time and a valid daily ending time for purchases including AM or PM.

To Edit another card while on the Edit a Card function

If you would like to change the selected card once you have chosen one, you have two options:

1. Enter a new Card Id in the box at the top of the screen labeled Edit Another Card and click the Find **button. This will re-populate the screen with the new card data.**
-OR-
2. Click the Edit a Card link at far left navigation pane and begin again.

How to View a vehicle

To View a Vehicle, follow these steps.

1. Click on the View a Vehicle function beneath the Maintain Vehicles>> menu on the left-most navigation pane on the screen.

2. Find the vehicle you would like to view by using the search options provided.

If you know the Vehicle Id.

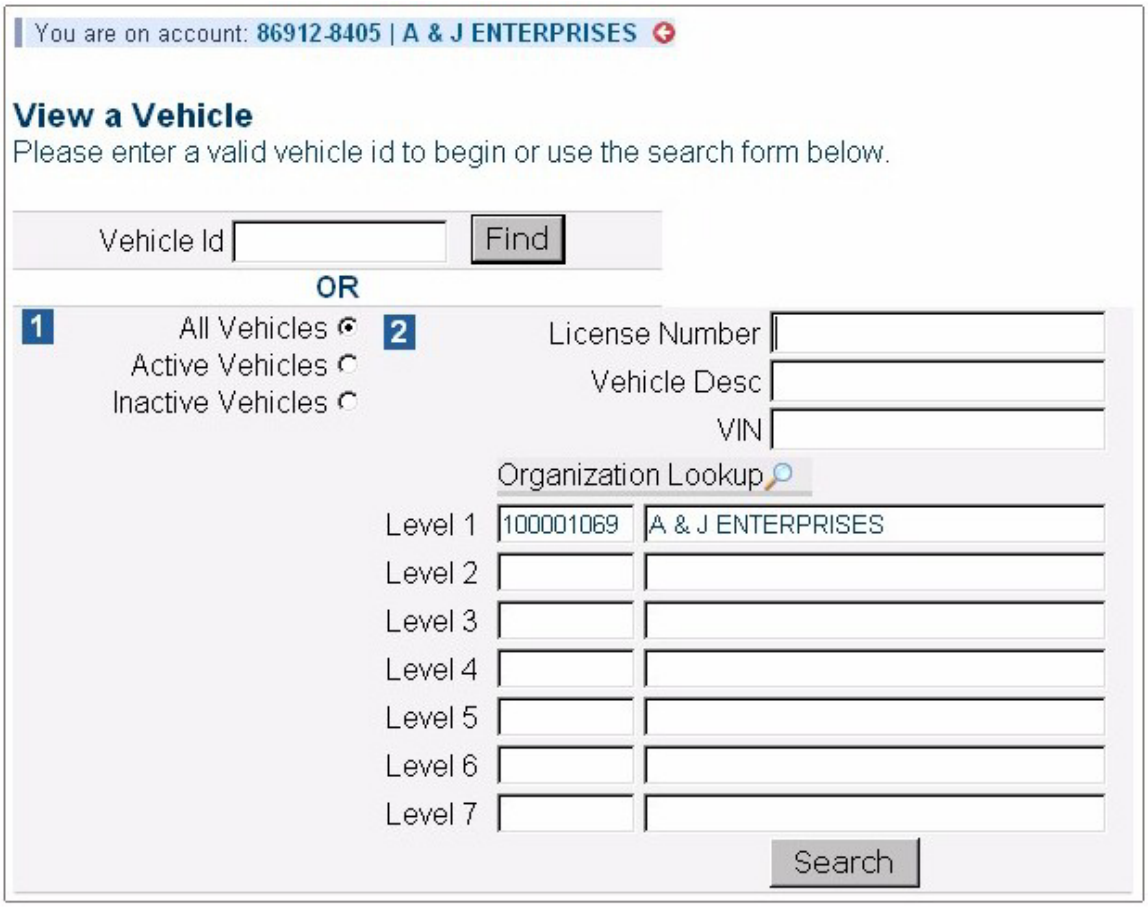
1. Click on the field next to Vehicle Id and type in the Vehicle Id.

2. Press the

button to locate the Vehicle.

3. Once the system locates a matching Vehicle Id, the next screen will be populated with all available data.

If you do not know the Vehicle id.



You may search for the Vehicle using all or a portion of the License #, Vehicle Description or VIN.

Follow these steps to search for the vehicle:

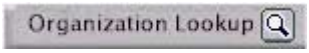
1. Click one of the choices on the bottom left to search

- **All Vehicles in the system**
- **Active Vehicles**
- **InActive Vehicles**

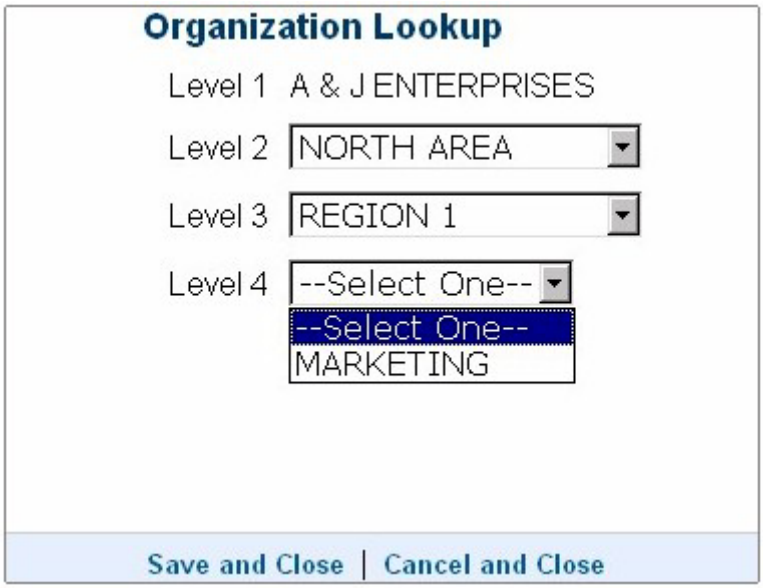
2. Type in all (or a portion of by using * as a wildcard) one of the following:

- **License #**
- **Vehicle Desc.**
- **VIN**
- **Vehicle Number**

3. Select Org Level(s) to view vehicles within if desired (Default is all vehicles under the Level 1 of your account)

By clicking on the 

button the user has the option to search for all vehicles tied to a particular organizational level if desired, by selecting levels from the drop down box as shown below.



4. Click the

button to view a list of vehicles matching your selections. A list will display on the screen all records found in the system matching either the License #, Vehicle Description or VIN or portion of the Vehicle Number you typed in the search fields.

5. View the choices and click the <u>Select</u> link in the left-most column to select the vehicle. The next screen will be populated with all available data.

To View a different vehicle while on the View a Vehicle function

If you would like to change the selected vehicle once you have chosen one, you have two options:

1. Enter a new Vehicle Id in the box at the top of the screen labeled View Another Vehicle and click the

button. This will re-populate the screen with the new vehicle data.
-OR-
2. Click the View a Vehicle link at far left navigation pane and begin again.

How to Terminate a Vehicle

To terminate a Vehicle, follow these instructions:

1. Choose the Terminate a Vehicle function beneath the Maintain Vehicles>> menu on the left-most navigation pane on the screen.

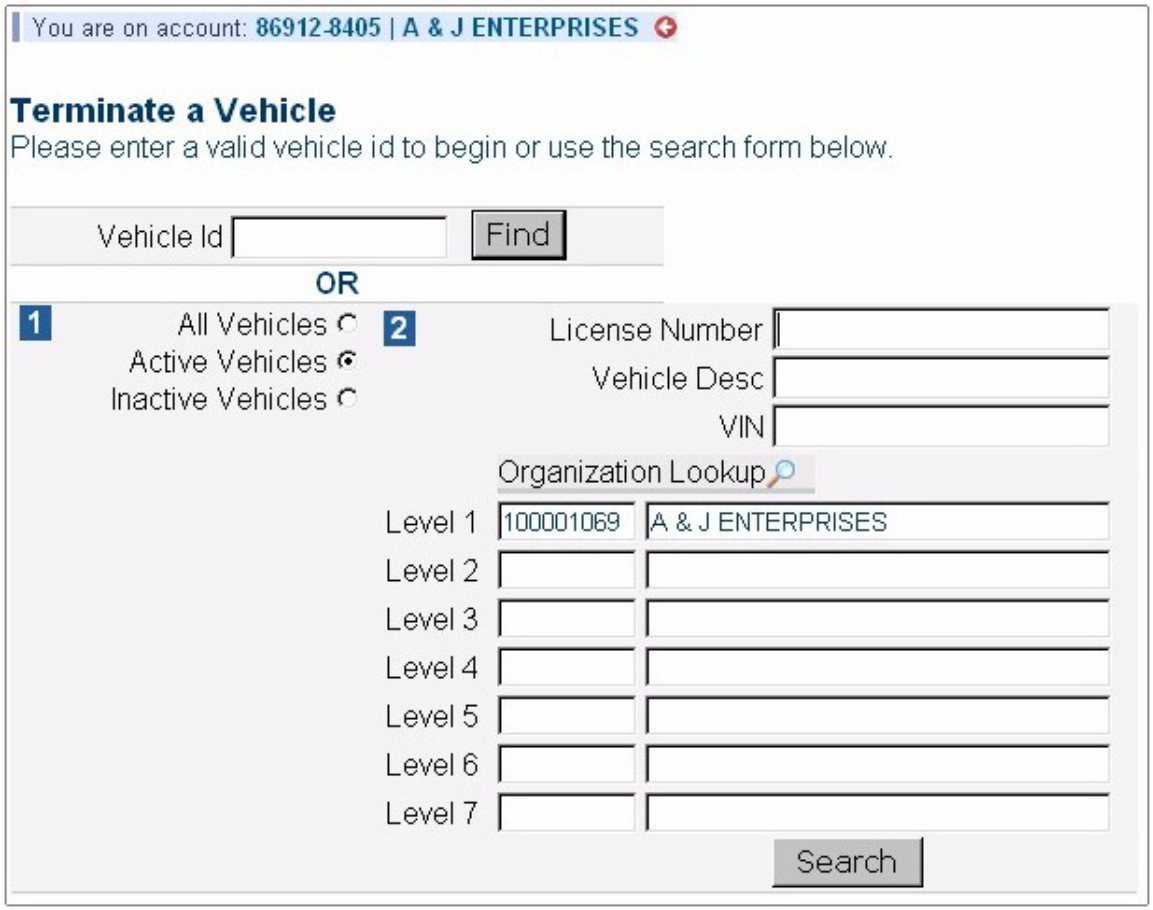
2. Find the vehicle you would like to terminate by using the search options provided.
Once you have selected the vehicle you will be presented with the screen pre-populated with the selected vehicle information.

3. Review the vehicle information and click the Terminate button to terminate the selected vehicle or the Cancel to return to the previous screen. Once the Terminate button is clicked you will be prompted to confirm your choice.

If you know the Vehicle Id.

1. Click on the field next to Vehicle Id and type in the Vehicle Id.
2. Press the Find button to locate the Vehicle.
3. Once the system locates a matching Vehicle Id, the next screen will be populated with all available data.

If you do not know the Vehicle id.



You may search for the Vehicle using all or a portion of the License #, Vehicle Description or VIN.

Follow these steps to search for the vehicle:

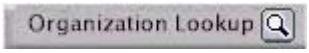
1. Click one of the choices on the bottom left to search

- **All Vehicles in the system**
- **Active Vehicles**
- **InActive Vehicles**

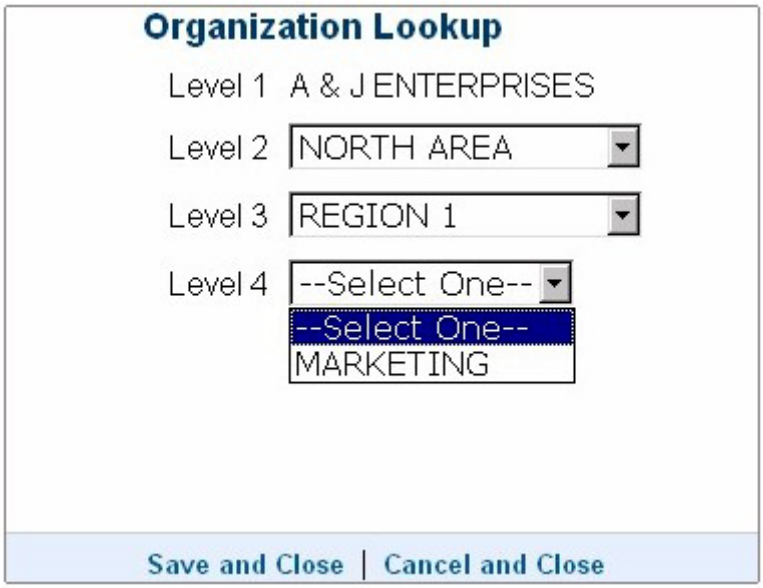
2. Type in all (or a portion of) one of the following:

- **License #**
- **Vehicle Desc.**
- **VIN**
- **Vehicle Number**

3. Select Org Level(s) to view vehicles within if desired (Default is all vehicles under the Level 1 of your account)

By clicking on the 

button the user has the option to search for all vehicles tied to a particular organizational level if desired, by selecting levels from the drop down box as shown below.



4. Click the

button to view a list of vehicles matching your selections. A list will display on the screen all records found in the system matching either the License #, Vehicle Description or VIN or portion of the Vehicle Number you typed in the search fields.

5. View the choices and click the <u>Select</u> link in the left-most column to select the vehicle. The next screen will be populated with all available data.

To Terminate another Vehicle while on the Terminate a Vehicle function

If you would like to change the selected vehicle once you have chosen one, you have two options:

1. Enter a new Vehicle Id in the box at the top of the screen labeled Terminate Another Vehicle and click the

button. This will re-populate the screen with the new vehicle data.
-OR-
2. Click the Terminate a Vehicle link at far left navigation pane and begin again.

How to Reactivate a Vehicle

To Reactivate a Vehicle, follow these instructions:

1. Choose the Reactivate a Vehicle>> function beneath the Maintain Vehicles>> menu on the left-most navigation pane on the screen.

2. Find the vehicle you would like to reactivate.
Once you have selected the vehicle you will be presented with the screen pre-populated with the selected vehicle information.

3. Review the vehicle information and click the Reactivate **button to reactivate the selected vehicle or the** Cancel **to return to the previous screen. Once the Reactivate button is clicked you will be prompted to confirm your choice.**

If you know the Vehicle Id.

1. Click on the field next to Vehicle Id and type in the Vehicle Id.
2. Press the Find **button to locate the Vehicle.**
3. Once the system locates a matching Vehicle Id, the next screen will be populated with all available data.

If you do not know the Vehicle id.

You are on account: 86912-8405 | A & J ENTERPRISES

Reactivate a Vehicle

Please enter a valid vehicle id to begin or use the search form below.

Vehicle Id [ ] Find

OR

1 All Vehicles ○
Active Vehicles ○
Inactive Vehicles ◉

2 License Number [ ]
Vehicle Desc [ ]
VIN [ ]

Organization Lookup

Level 1	100001069	A & J ENTERPRISES
Level 2		
Level 3		
Level 4		
Level 5		
Level 6		
Level 7		

Search

You may search for the Vehicle using all or a portion of the License #, Vehicle Description or VIN.

Follow these steps to search for the vehicle:

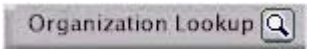
1. Click one of the choices on the bottom left to search

- **All Vehicles in the system**
- **Active Vehicles**
- **InActive Vehicles**

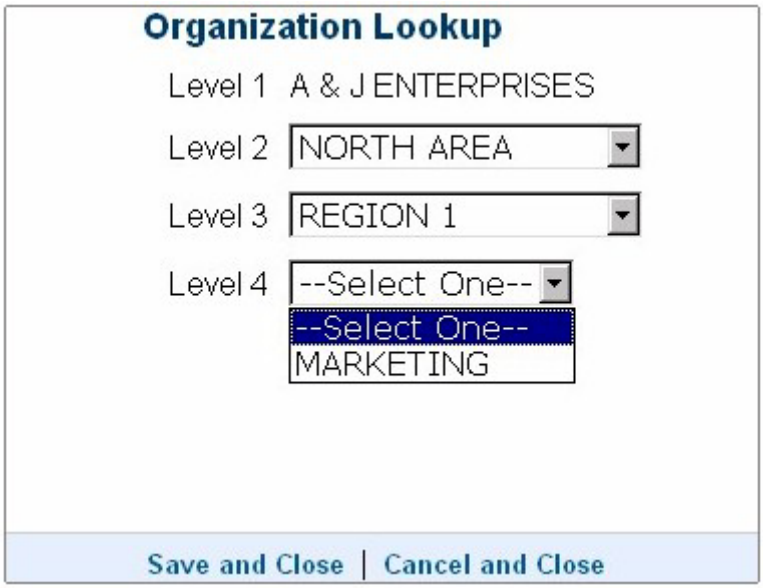
2. Type in all (or a portion of) one of the following:

- **License #**
- **Vehicle Desc.**
- **VIN**
- **Vehicle Number**

3. Select Org Level(s) to view vehicles within if desired (Default is all vehicles under the Level 1 of your account)

By clicking on the 

button the user has the option to search for all vehicles tied to a particular organizational level if desired, by selecting levels from the drop down box as shown below.



4. Click the

button to view a list of vehicles matching your selections. A list will display on the screen all records found in the system matching either the License #, Vehicle Description or VIN or portion of the Vehicle Number you typed in the search fields.

5. View the choices and click the <u>Select</u> link in the left-most column to select the vehicle. The next screen will be populated with all available data.

To Reactivate another Vehicle while on the Reactivate a Vehicle function

If you would like to change the selected vehicle once you have chosen one, you have two options:

1. Enter a new Vehicle Id in the box at the top of the screen labeled Reactivate Another Vehicle and click the

button. This will re-populate the screen with the new vehicle data.
-OR-
2. Click the Reactivate a Vehicle link at far left navigation pane and begin again.

How to Edit a Vehicle

To Edit a Vehicle, follow these steps.

1. Choose the Edit a Vehicle>> function beneath the Maintain Vehicles>> menu on the left-most navigation pane on the screen.

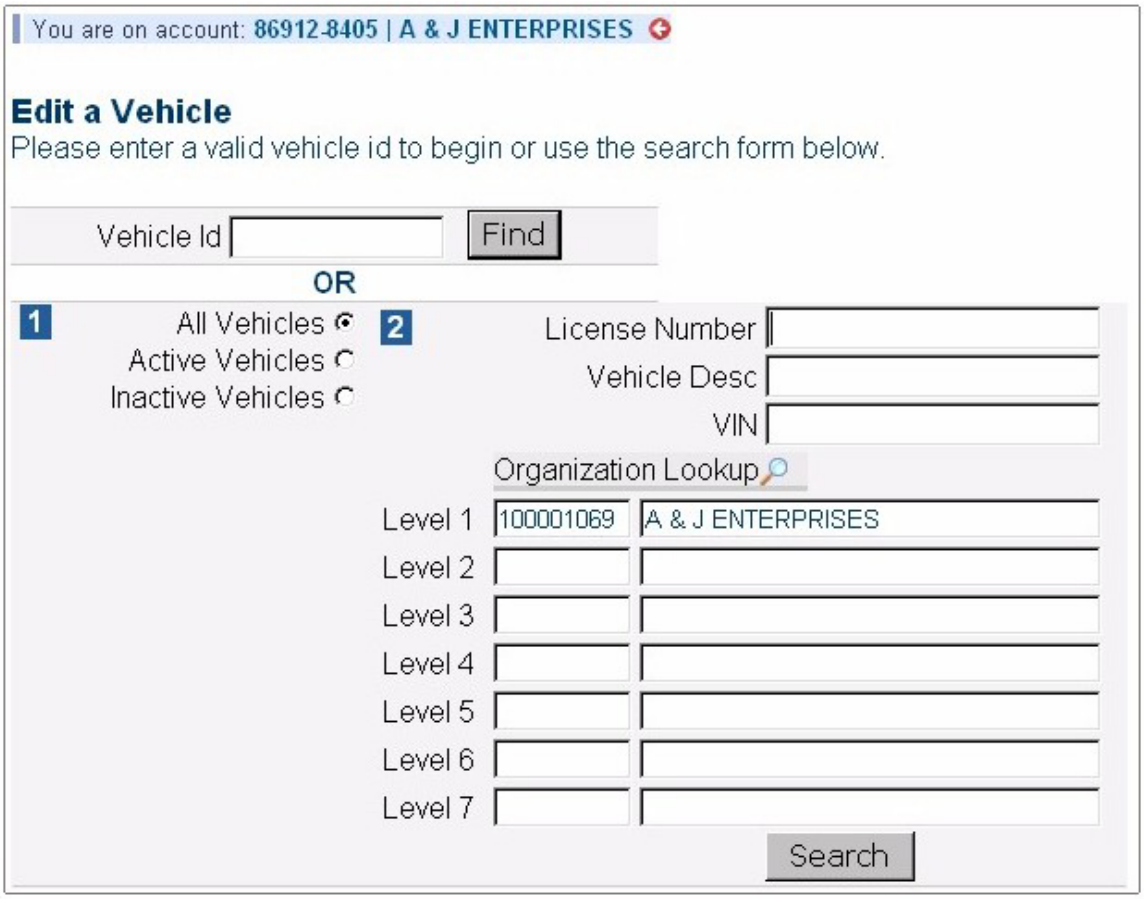
2. Find the vehicle you would like to edit.
Once you have selected the vehicle you will be presented with the screen pre-populated with the selected vehicle data.

3. After you have made your changes, click the Save Changes **button to save your work, or click the** Reset Form **button to clear all your entries and begin again.**

If you know the Vehicle Id.

1. Click on the field next to Vehicle Id and type in the Vehicle Id.
2. Press the Find **button to locate the Vehicle.**
3. Once the system locates a matching Vehicle Id, the next screen will be populated with all available data.

If you do not know the Vehicle id.



You may search for the Vehicle using all or a portion of the License #, Vehicle Description or VIN.

Follow these steps to search for the vehicle:

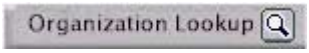
1. Click one of the choices on the bottom left to search

- **All Vehicles in the system**
- **Active Vehicles**
- **InActive Vehicles**

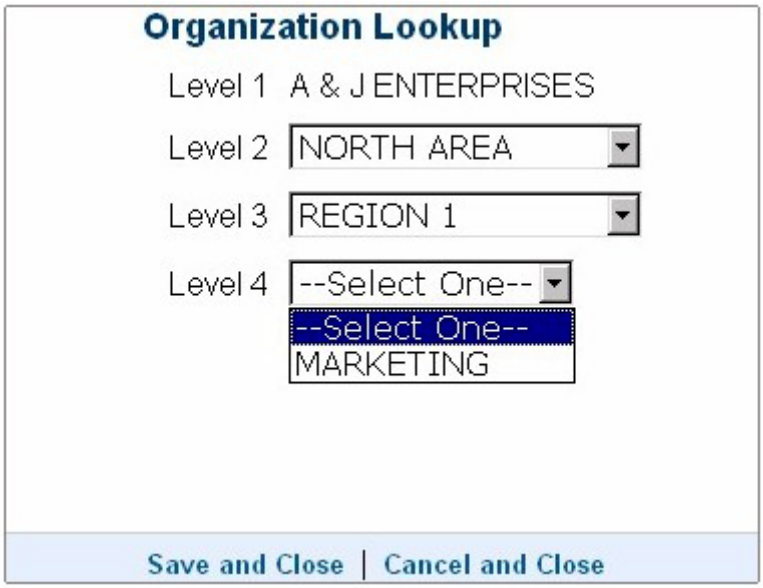
2. Type in all (or a portion of) one of the following:

- **License #**
- **Vehicle Desc.**
- **VIN**
- **Vehicle Number**

3. Select Org Level(s) to view vehicles within if desired (Default is all vehicles under the Level 1 of your account)

By clicking on the 

button the user has the option to search for all vehicles tied to a particular organizational level if desired, by selecting levels from the drop down box as shown below.



4. Click the

button to view a list of vehicles matching your selections. A list will display on the screen all records found in the system matching either the License #, Vehicle Description or VIN or portion of the Vehicle Number you typed in the search fields.

5. View the choices and click the <u>Select</u> link in the left-most column to select the vehicle. The next screen will be populated with all available data.

The following information displays on the Edit a Vehicle screen:

Vehicle Information

This section contains vehicle information, some of which can be updated and some static information for display purposes only.

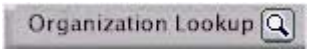
The following data may not be updated.

- **Status**
- **Status Date**
- **Vehicle Id**

You may update the following information for this vehicle by clicking in the box to each of the following labels:

- **License Number**
- **State**
- **VIN**
- **Vehicle Description**

Vehicle Organizations

The vehicle organizations can be selected using the 

icon. Click this icon next to the fields labeled Level 1 - Level 7 to choose up to seven levels of organizations for the selected vehicle.

Vehicle User Codes

Up to five vehicle user codes can be manually entered using the text boxes next to the fields labeled Code1 - Code5

Standard Exceptions - Fuel/Product Exceptions

You may select the type of fuel/products that are supposed to be purchased for a particular card/vehicle under the section titled Fuel/Product Exceptions.

***Please note - These settings will not prevent the driver from purchasing other types of products, but the transactions will be shown in an Exception report sent out with your normal Voyager billing.**

To set these restrictions you will first need to obtain the two digit code for the product that you are setting. (Ex. - 01=Unleaded, 05=Diesel, etc.) If you do not know the proper code or would like a complete listing of all product codes please contact a Voyager client services representative at 1-800-987-6591.

Once you have the needed information you may enter up to two Valid Products that may be purchased for that particular vehicle in the Valid Product 1 and Valid Product 2 fields respectively.

The capacity that the vehicle is expected to hold of each product may be entered in the Capacity 1 and Capacity 2 fields.

The Units Per Gallon would need to be filled in the user chooses to document the amount of units (Ex. - Miles/Kilos) per gallon of fuel.

The Units Of Measure would need to be filled in to correspond with the Units Per Gallon. In the Units Of Measure field the user will need to enter Miles or Kilos as the measurement of units.

The % Variance field is the variance range of the amount over what has specified that can be purchased. (Ex. - You have a vehicle set up to show that it can hold 30.0 gallons of fuel. You set the variance to be 10%. This means the transaction will be flagged if the user purchases greater than 33.0 gallons.)

Standard Exceptions - Card Purchase Restrictions

You may also choose to limit the purchases for the driver of this vehicle using Valid Purchase Days and Valid Purchase Time.

Choose one of the following options for Valid Purchase Days

- **Can Purchase 7 Days a Week**
- **Can Purchase Monday - Friday**
- **Can Purchase on Saturday**
- **Can Purchase on Sunday**
- **Can Purchase Monday - Saturday**
- **Can Purchase Monday - Friday and Sunday**
- **Can Purchase on Saturday and Sunday**

Select either All or Specific Range to choose Valid Purchase Time for this vehicle. Make sure to choose a valid daily start time and a valid daily ending time for purchases including AM or PM.

To Edit another Vehicle while on the Edit a Vehicle function

If you would like to change the selected vehicle once you have chosen one, you have two options:

1. Enter a new Vehicle Id in the box at the top of the screen labeled Edit Another Vehicle and click the

button. This will re-populate the screen with the new vehicle data.
-OR-
2. Click the Edit a Vehicle link at far left navigation pane and begin again.

How to Add a Vehicle without Card

To add a Vehicle without an associated Card, follow these steps.

1. Choose the Add a Vehicle w/out Card>> function beneath the Maintain Vehicles>> menu on the left-most navigation pane on the screen.

To add the vehicle to the system enter the required information on the screen and click either the Create button to add the vehicle without a card or the Cancel button to return to the previous screen. See below for a description of the information on this screen.

Vehicle Information

- **Vehicle Id - If the company has the Company Select Vehicle flag set to Y, then you may choose the Vehicle Id for this Vehicle. If the Company Select Vehicle flag is set to N for this company, the Vehicle Id is system generated for you.**
- **License Number**
- **State**
- **VIN**
- **Vehicle Description**

Vehicle Organizations

The vehicle organizations can be selected using the Organization Lookup icon. Click this icon next to the fields labeled Level 1 - Level 7 to choose up to seven levels of organizations for the selected vehicle.

Vehicle User Codes

Up to five vehicle user codes can be manually entered using the text boxes next to the fields labeled Code1 - Code5

Standard Exceptions

You may enter the following:

- **Valid Fuel 1- Valid types of fuel for the vehicle**
- **Valid Fuel 2- Valid type of fuel for the vehicle**
- **Units Per Gallon - Units per gallon in which the fuel is measured for the vehicle**
- **Unit of Measure - How is the fuel measured for the vehicle?**
- **Capacity 1 - About how many units can the vehicle hold? Must be a number ranging from 0-9999.9.**
- **Capacity 2 - About how many units can the vehicle hold? Capacity 2 must be a number ranging from 0-9999.9.**
- **Units Per Gallon % Variance - must be a number ranging from 0-0.99**

You may also choose to limit the purchases for this vehicle using Valid Purchase Days and Valid Purchase Time.

Choose one of the following options for Valid Purchase Days

- **Can Purchase 7 Days a Week**
- **Can Purchase Monday - Friday**
- **Can Purchase on Saturday**
- **Can Purchase on Sunday**
- **Can Purchase Monday - Saturday**
- **Can Purchase Monday - Friday and Sunday**
- **Can Purchase on Saturday and Sunday**

Select either All or Specific Range to choose Valid Purchase Time or this vehicle. Make sure to choose a valid daily start time and a valid daily ending time for purchases including AM or PM.

To Add a Vehicle without card click the Create **at the bottom of the page. You will then be asked to confirm with the message box appearing asking "Are you sure?". If all information is correct click "OK". If changes need to be made, click "No" and you will be taken back to the information previously entered on the Add a Vehicle without card screen.**
If there is information that was incorrectly entered and you would like to start the process over, click on the Reset Form **button. This will clear all information on the screen that the user has entered.**

To Add another Vehicle w/out Card while on the Add Vehicle w/out Card function

If you would like to change the selected vehicle once you have chosen one, you have two options:

1. Enter a new Vehicle Id in the box at the top of the screen labeled Vehicle Id and proceed with entering the next new vehicle's data, then click Create **.**

-OR-

2. Click the Add a Vehicle w/out Card link at far left navigation pane and begin again.

How to View a driver

To View a Driver, follow these steps.

1. Click on the View a Driver function beneath Maintain Drivers>> menu on the left-most navigation pane on the screen.

2. Find the driver you would like to view by using the search options provided.

If you know the Driver Id.

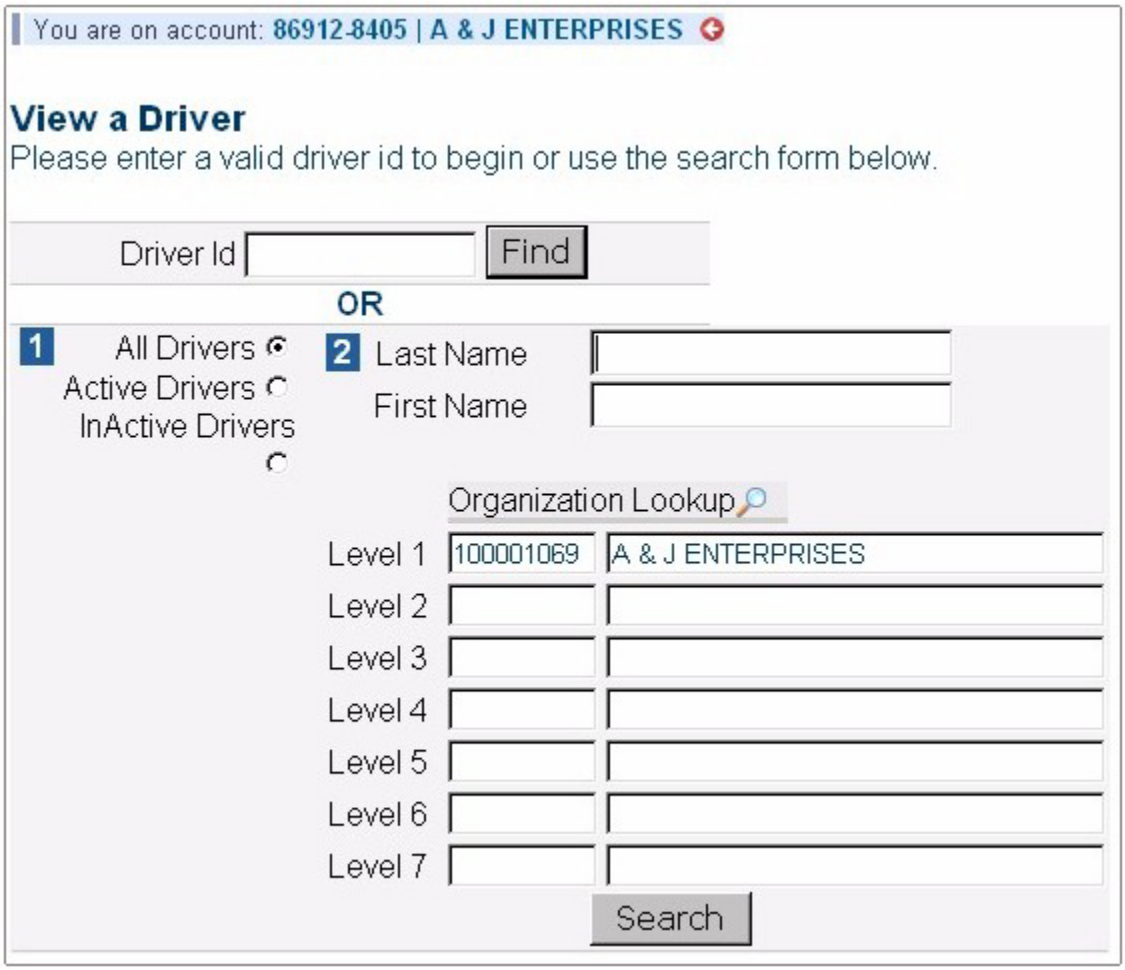
1. Click on the field next to Driver Id and type in the Driver Id.

2. Press the

button to locate the driver.

3. Once the system locates a driver with a matching Driver Id, the next screen will be populated with all available data.

If you do not know the Driver Id.



Follow these steps to search for the driver:

1. Click one of the choices on the bottom left to search

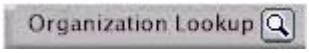
- **All drivers in the system**
- **Active Drivers**
- **InActive Drivers**

2. You may search for the driver using all or a portion of the driver's first and last name.

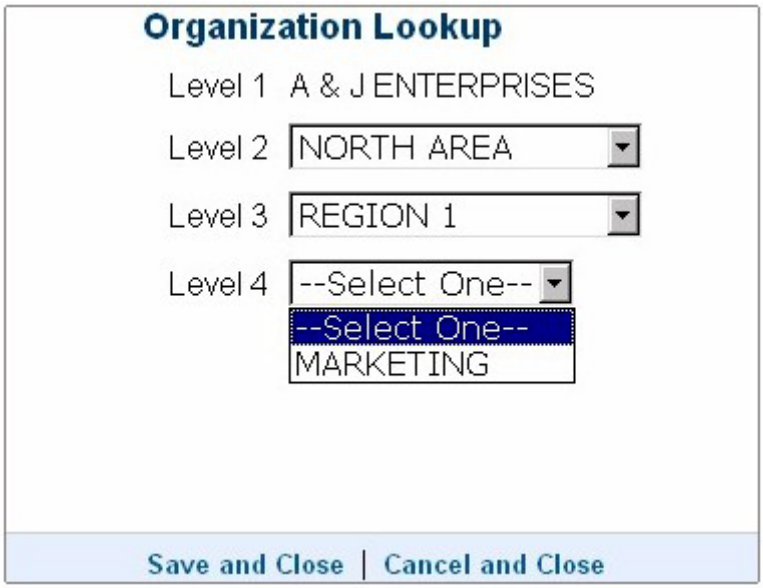
a. Type in the driver's Last Name (or a portion of the driver's last name followed by an asterisk).

b. (Optional) Type in the driver's First Name (or a portion of the driver's first name followed by an asterisk).

3. Select Org Level(s) to view drivers within if desired (Default is all drivers under the Level 1 of your account)

By clicking on the 

button the user has the option to search for all drivers tied to a particular organizational level if desired, by selecting levels from the drop down box as shown below.



4. Click the

button to view a list of drivers matching your selections. A list will display on the screen all records found in the system matching your specified search criteria. This list contains the Action, Driver Id, Last Name, First Name, Middle Initial (MI) and Status.

5. View the choices and click the <u>Select</u> link in the left-most column to select the driver. The next screen will be populated with all available data.

To View a different Driver while on the View a Driver function

If you would like to change the selected driver once you have chosen one, you have two options:

1. Enter a new Driver Id in the box at the top of the screen labeled View Another Driver and click the

button. This will re-populate the screen with the new driver data.
-OR-
2. Click the View a Driver link at far left navigation pane and begin again.

How to Terminate a Driver

To terminate a Driver, follow these instructions:

1. Choose the Terminate a Driver function beneath Maintain Drivers>> menu on the left-most navigation pane on the screen.

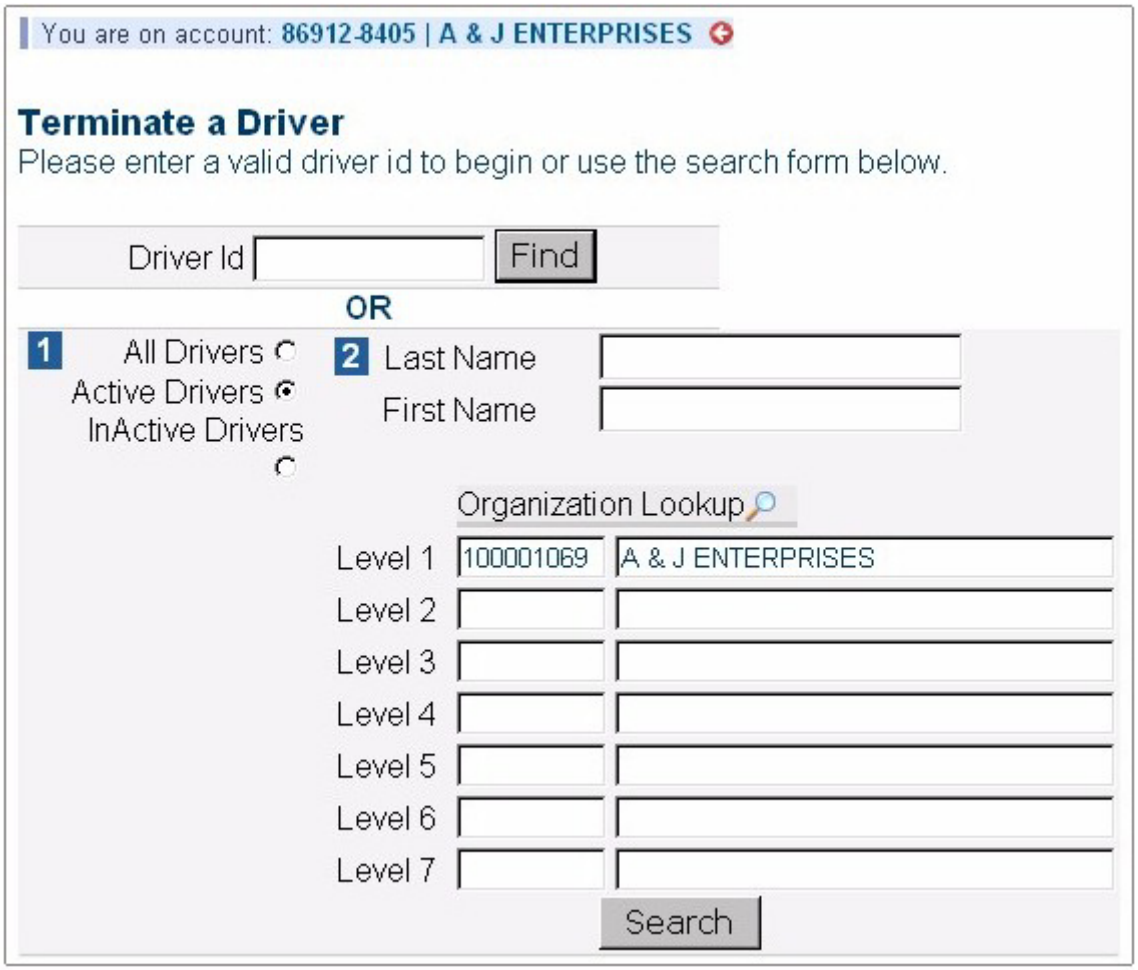
2. Find the driver you would like to terminate by using the search options provided.
Once you have selected the driver you will be presented with the screen pre-populated with the selected driver information.

3. Review the driver information and click the Terminate button to terminate the selected driver or the Cancel to return to the previous screen. Once the Terminate button is clicked you will be prompted to confirm your choice.

If you know the Driver Id.

1. Click on the field next to Driver Id and type in the Driver Id.
2. Press the Find button to locate the driver.
3. Once the system locates a driver with a matching Driver Id, the next screen will be populated with all available data.

If you do not know the Driver Id.



Follow these steps to search for the driver:

1. Click one of the choices on the bottom left to search

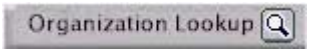
- **All drivers in the system**
- **Active Drivers**
- **InActive Drivers**

2. You may search for the driver using all or a portion of the driver's first and last name.

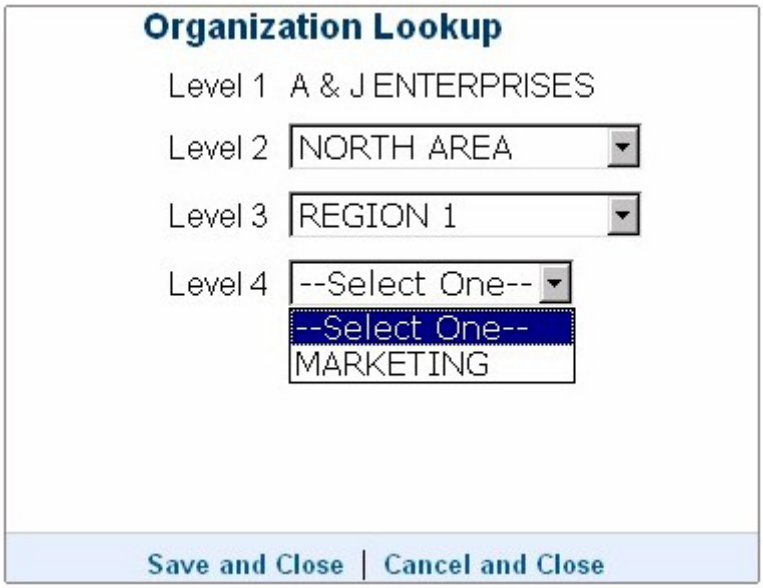
a. Type in the driver's Last Name (or a portion of the driver's last name followed by an asterisk).

b. (Optional) Type in the driver's First Name (or a portion of the driver's first name followed by an asterisk).

3. Select Org Level(s) to view drivers within if desired (Default is all drivers under the Level 1 of your account)

By clicking on the 

button the user has the option to search for all drivers tied to a particular organizational level if desired, by selecting levels from the drop down box as shown below.



4. Click the

button to view a list of drivers matching your selections. A list will display on the screen all records found in the system matching your specified search criteria. This list contains the Action, Driver Id, Last Name, First Name, Middle Initial (MI) and Status.

5. View the choices and click the <u>Select</u> link in the left-most column to select the driver. The next screen will be populated with all available data.

To Terminate another Driver while on the Terminate a Driver function

If you would like to change the selected driver once you have chosen one, you have two options:

1. Enter a new Driver Id in the box at the top of the screen labeled Terminate Another Driver and click the

button. This will re-populate the screen with the new driver data.
-OR-
2. Click the Terminate a Driver link at far left navigation pane and begin again.

How to Reactivate a Driver

To Reactivate a Driver, follow these instructions:

1. Choose the Reactivate a Driver function beneath Maintain Drivers>> menu on the left-most navigation pane on the screen.

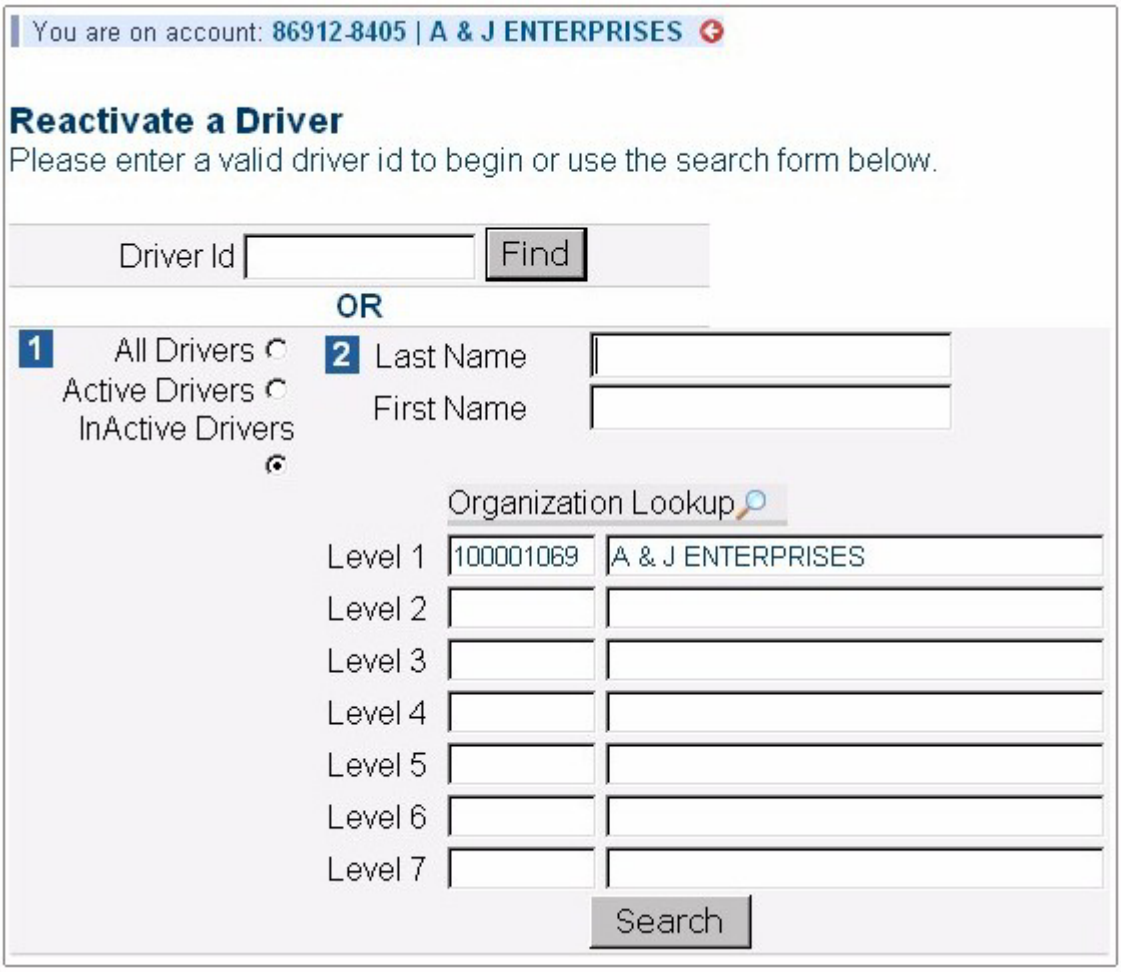
2. Find the driver you would like to reactivate by using the search options provided.
Once you have selected the driver you will be presented with the screen pre-populated with the selected driver's information.

3. Review the driver information and click the Reactivate **button to reactivate the selected driver or the** Cancel **to return to the previous screen. Once the Reactivate button is clicked you will be prompted to confirm your choice.**

If you know the Driver Id.

1. Click on the field next to Driver Id and type in the Driver Id.
2. Press the Find **button to locate the driver.**
3. Once the system locates a driver with a matching Driver Id, the next screen will be populated with all available data.

If you do not know the Driver Id.



Follow these steps to search for the driver:

1. Click one of the choices on the bottom left to search

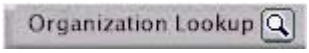
- **All drivers in the system**
- **Active Drivers**
- **InActive Drivers**

2. You may search for the driver using all or a portion of the driver's first and last name.

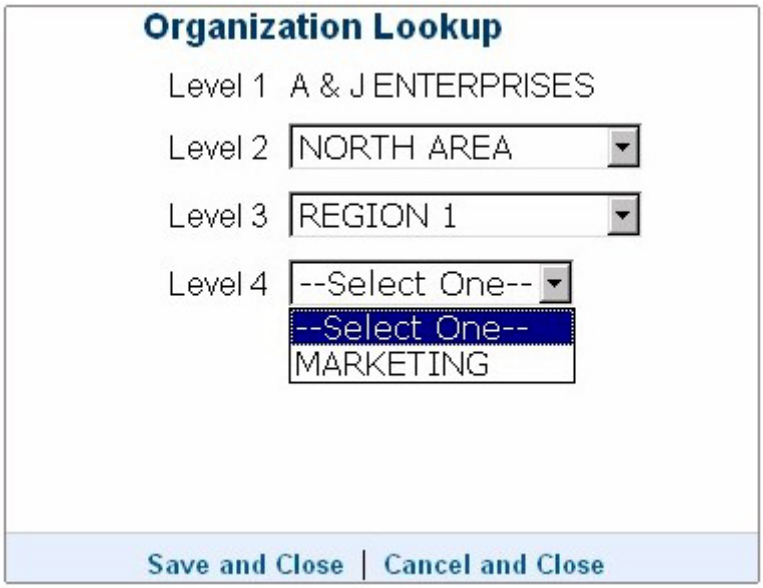
a. Type in the driver's Last Name (or a portion of the driver's last name followed by an asterisk).

b. (Optional) Type in the driver's First Name (or a portion of the driver's first name followed by an asterisk)

3. Select Org Level(s) to view drivers within if desired (Default is all drivers under the Level 1 of your account)

By clicking on the 

button the user has the option to search for all drivers tied to a particular organizational level if desired, by selecting levels from the drop down box as shown below.



4. Click the

button to view a list of drivers matching your selections. A list will display on the screen all records found in the system matching your specified search criteria. This list contains the Action, Driver Id, Last Name, First Name, Middle Initial (MI) and Status.

5. View the choices and click the <u>Select</u> link in the left-most column to select the driver. The next screen will be populated with all available data.

To Reactivate another Driver while on the Reactivate a Driver function

If you would like to change the selected driver once you have chosen one, you have two options:

1. Enter a new Driver Id in the box at the top of the screen labeled Reactivate Another Driver and click the

button. This will re-populate the screen with the new driver data.
-OR-
2. Click the Reactivate a Driver link at far left navigation pane and begin again.

How to Edit a Driver

To Edit a Driver, follow these steps.

1. **Choose the Edit a Driver function beneath Maintain Drivers>> menu on the left-most navigation pane on the screen.**

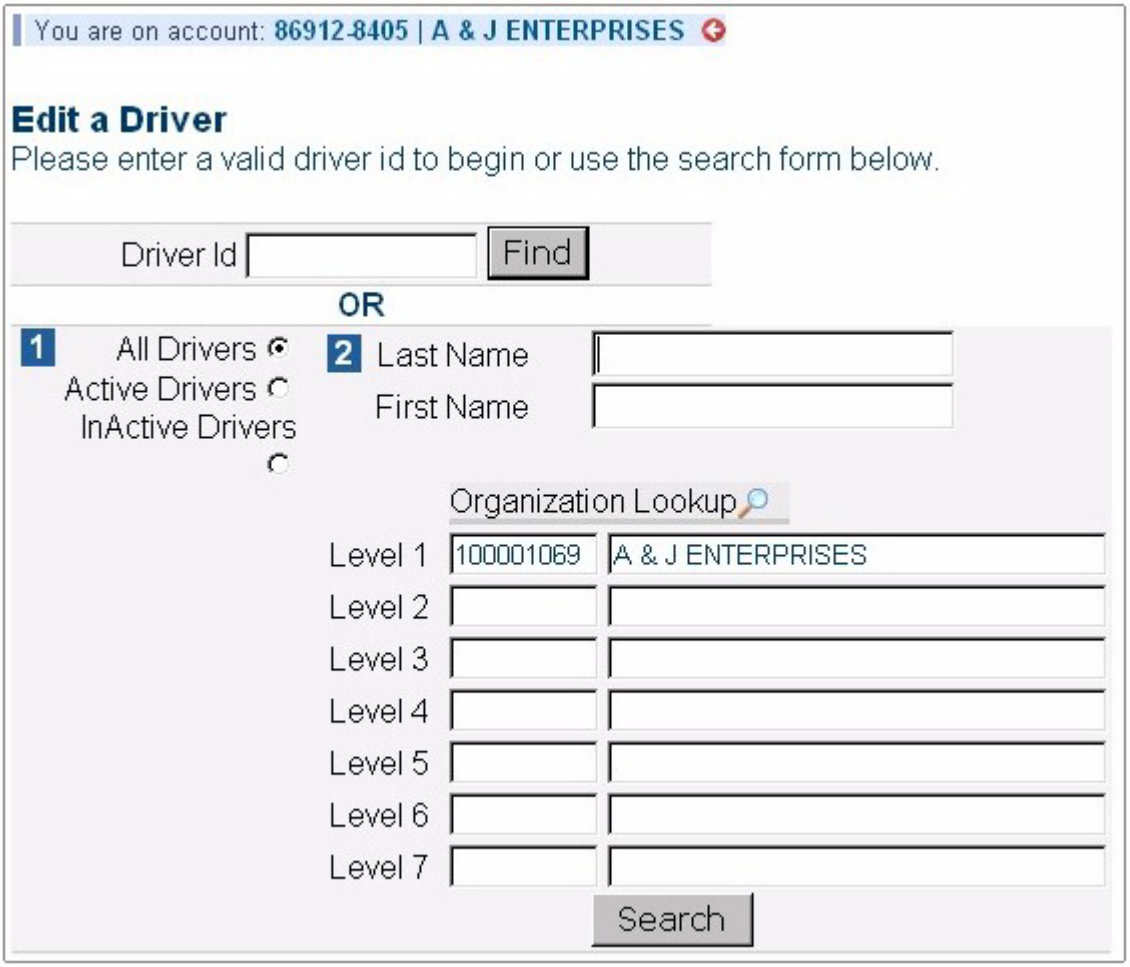
2. Find the driver you would like to edit by using the search options provided.
Once you have selected the driver you will be presented with the screen pre-populated with the selected driver data.

3. After you have made your changes, click the Save Changes **button to save your work, or click the** Reset Form **button to clear all your entries and begin again.**

If you know the Driver Id.

1. Click on the field next to Driver Id and type in the Driver Id.
2. Press the Find **button to locate the driver.**
3. Once the system locates a driver with a matching Driver Id, the next screen will be populated with all available data.

If you do not know the Driver Id.



Follow these steps to search for the driver:

1. Click one of the choices on the bottom left to search

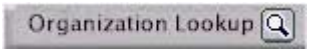
- **All drivers in the system**
- **Active Drivers**
- **InActive Drivers**

2. You may search for the driver using all or a portion of the driver's first and last name.

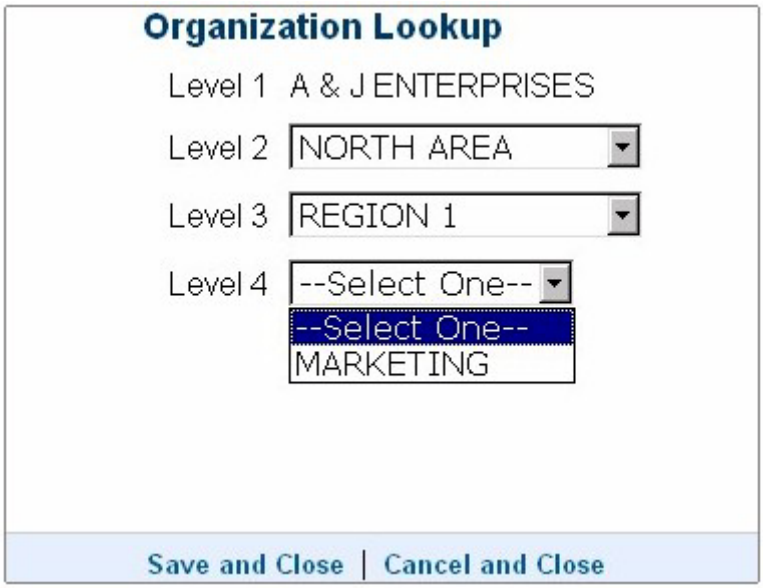
a. Type in the driver's Last Name (or a portion of the driver's last name followed by an asterisk).

b. (Optional) Type in the driver's First Name (or a portion of the driver's first name followed by an asterisk).

3. Select Org Level(s) to view drivers within if desired (Default is all drivers under the Level 1 of your account)

By clicking on the 

button the user has the option to search for all drivers tied to a particular organizational level if desired, by selecting levels from the drop down box as shown below.



4. Click the

button to view a list of drivers matching your selections. A list will display on the screen all records found in the system matching either the drivers first and or last name you typed in the search fields. This list contains the Action, Driver Id, Driver Last Name, Driver First Name, Driver Middle Initial (MI) and Status.

5. View the choices and click the <u>Select</u> link in the left-most column to select the driver. The next screen will be populated with all available data.

The following information displays on the Edit a Driver screen:

Driver Information

This section contains driver information, some of which can be updated and some static information for display purposes only.

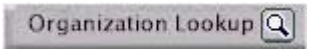
The following data may not be updated.

- **Driver Id - If the company has the Company Select Driver flag set to Y, then you may choose the Driver Id for this Driver. If the Company Select Driver flag is set to N for this company, the Driver Id is system generated for you.**
- **Status**
- **Status Date**

You may update the following information for this driver by clicking in the box to each of the following labels:

- **First Name**
- **MI (Middle Initial)**
- **Last Name**

Driver Organizations

The driver organizations can be selected using the 

icon. Click this icon next to the fields labeled Level 1 - Level 7 to choose up to seven levels of organizations for the selected driver.

Driver User Codes

Up to five driver user codes can be manually entered using the text boxes next to the fields labeled Code1 - Code5

Standard Exceptions

You may choose to limit the drivers Valid Purchase Days and Valid Purchase Time.

Choose one of the following options for Valid Purchase Days

- **Can Purchase 7 Days a Week**
- **Can Purchase Monday - Friday**
- **Can Purchase on Saturday**
- **Can Purchase on Sunday**
- **Can Purchase Monday - Saturday**
- **Can Purchase Monday - Friday and Sunday**
- **Can Purchase on Saturday and Sunday**

Select either All or Specific Range to choose Valid Purchase Time for this driver. Make sure to choose a valid daily start time and a valid daily ending time for purchases including AM or PM.

To Edit another Driver while on the Edit a Driver function

If you would like to change the selected driver once you have chosen one, you have two options:

1. Enter a new Driver Id in the box at the top of the screen labeled Edit Another Driver and click the

button. This will re-populate the screen with the new driver data.
-OR-
2. Click the Edit a Driver link at far left navigation pane and begin again.

How to Add a Driver without a Card

To add a Driver without an associated Card, follow these steps.

1. Choose the Add a Driver w/out Card>> function beneath the Maintain Drivers>> menu on the left-most navigation pane on the screen.

To add the driver to the system enter the required information on the screen and click either the Create button or the Cancel button to return to the previous screen.

Driver Information

- **Driver Id - If the company has the Company Select Driver flag set to Y, then you may choose the Driver Id for this Driver. If the Company Select Driver flag is set to N for this company, the Driver Id is system generated for you.**
- **First Name**
- **MI (Middle Initial)**
- **Last Name**

Driver Organizations

The driver organizations can be selected using the Organization Lookup icon. Click this icon next to the fields labeled Level 1 - Level 7 to choose up to seven levels of organizations for the selected driver.

Driver User Codes

Up to five driver user codes can be manually entered using the text boxes next to the fields labeled Code1 - Code5

You may choose to limit the purchases for the driver using Valid Purchase Days and Valid Purchase Time.

Choose one of the following options for Valid Purchase Days

- **Can Purchase 7 Days a Week**
- **Can Purchase Monday - Friday**
- **Can Purchase on Saturday**
- **Can Purchase on Sunday**
- **Can Purchase Monday - Saturday**
- **Can Purchase Monday - Friday and Sunday**
- **Can Purchase on Saturday and Sunday**
-

Select either All or Specific Range to choose Valid Purchase Time for this driver. Make sure to choose a valid daily start time and a valid daily ending time for purchases including AM or PM.

To Add a Driver without card click the Create **button at the bottom of the page. You will then be asked to confirm with the message box appearing asking "Are you sure?". If all information is correct click "OK". If changes need to be made, click "No" and you will be taken back to the information previously entered on the Add a Driver without card screen.**
If there is information that was incorrectly entered and you would like to start the process over, click on the Reset Form **button. This will clear all information on the screen that the user has entered.**

To Add another Driver w/out Card while on the Add Driver w/out Card function

If you would like to change the selected driver once you have chosen one, you have two options:

1. Enter a new Driver Id in the box at the top of the screen labeled Driver Id and proceed with entering the next new driver's data, then click Create **.**
-OR-
2. Click the Add a Driver w/out Card link at far left navigation pane and begin again.