

WEX FLEET ONE *CarrierControl*

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Issued Today

Mobile App User Guide **DECEMBER 2017**

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Support

Click **Contact Us** on the Main menu to display the toll-free WEX FLEET ONE Support telephone number: **877.208.2195**. Support is available 24/7.

INTRODUCTION & APPLICATION DESCRIPTION

WEX FLEET ONE *CarrierControl* is a mobile application designed for fleet managers. The mobile app allows you to monitor your account and manage time-sensitive driver/cardholder card needs. You can quickly:

- Authorize MoneyCodes for checks
- Monitor the number and cost of today's MoneyCode transactions
- Track rejected transactions
- Monitor the amount of available credit on your contract
- Activate or Inactivate a card
- Override card use limits
- Load cash to card(s)

USING THE WEX FLEET ONE CARRIERCONTROL MOBILE APP

This section explains how to log in, display the menu, and move to other pages. It also provides a brief description of each management task you can perform with the app.



LOGIN

- 1. Start the mobile app by selecting the *Carrier Control* icon.
- 2. On the Login screen, enter your username and password, then click **Login**.

	FLEET ONE	=
MONEYCO	DDES	
	Codes Issued Today: 0	
Ar	mount Issued Today: \$0.	00
Amoun	t Used From Today's \$0. Codes:	00
MONE	YCODE MANAGER ISSU	JE CODE
CREDIT BA	ALANCE	
Contract 267277 -	BARBIE FLEET	
	Currency: USI	D
	Trans Limit: \$1,5	\$00.00
	Trans Limit: \$1.9 Original Amount: \$8,0	500.00 000.00
	Trans Limit: \$1,1 Original Amount: \$8, Credit Available: \$7,3	500.00 000.00 747.00
	Trans Limit: \$1, Original Amount: \$8, Credit Available: \$7, Daily Limit: \$80	500.00 000.00 747.00 0,000.00

APP USE

Home Page

The Home Page summarizes today's MoneyCode activity, credit balance, and transactions. You can expand or collapse each section of the page by clicking **MONEYCODE MANAGER** or **ISSUE CODE**.

MoneyCodes

The MoneyCodes section summarizes today's MoneyCode activity, showing the number issued, the total amount issued, and the amount used. See **MONEYCODE MANAGER** for details.

CREDIT	BALANCE
Contract	
174608	- EFS CREDIT - US*
	Currency: USD
	Trans Limit: \$1,500.00
	Original Amount: \$500.00
	Credit Available: \$34.00

APP USE

Credit Balance

The Credit Balance section shows the total amount of credit issued by WEX FLEET ONE and the amount of credit currently available for the selected contract. You can monitor the Credit Available line to ensure that it is enough to cover planned expenses.

Transactions

The Transactions section summarizes the number and total cost of today's transactions, and shows the number of transaction rejects. To view a detailed list of rejects, click **View Rejects** (described in "Transaction Rejects"). This information can aid in troubleshooting rejected transactions.





Menu Button

Click the **Menu** button in the top right corner of the page to select app functions. When you leave the Home page, a **Back <** button is added to the top of the page so you can quickly return to the Home page.

Menu Option	Purpose
MoneyCode Management	View MoneyCode usage and activity; issue new MoneyCodes
Card Maintenance	Find a specific card, view card activity and balances, inactivate the card, override card use limits, and load cash to the card
Transaction Rejects	View each rejected transaction, the transaction type, and the reason for rejection
Home	Return to the Home page
Settings	Change your name, cell phone number, and email address
Contact Us	WEX FLEET ONE Customer Support, available 24/7 toll free: 877.208.2195
Logout	Exit app

APPLICATION FUNCTIONS

< Wext RE	ETONE
MONEYCODE SUMMARY	
Codes Issued To	oday: 0
Amount Issued Te	oday: \$0.00
Amount Used From To C	day's odes: \$0.00
	-
	ISSUE CODE
MONEYCODE ACTIVITY	ISSUE CODE
MONEYCODE ACTIVITY 10/16/2017 16:28	Amount: \$100.00
MONEYCODE ACTIVITY 10/16/2017 16:28 Reference #: 106366091	Amount: \$100.00 Used: \$50.00
MONEYCODE ACTIVITY 10/16/2017 16:28 Reference #: 106366091 09/29/2017 09:39	Amount: \$100.00 Used: \$50.00
MONEYCODE ACTIVITY 10/16/2017 16-28 Reference II: 106366091 09/29/2017 09-39 Reference II: 106365733	Arnount: \$100.00 Used: \$50.00 Used: \$25.00
MONEYCODE ACTIVITY 10/16/2017.16.28 Reference II: 106366091 09/29/2017.09:39 Reference II: 106365733 09/29/2017.08:30	Amount: \$100.00 Used: \$50.00 Used: \$25.00 Amount: \$50.00
MONEYCODE ACTIVITY 10/16/2017.16.28 Reference II: 106366071 09/29/2017.09:39 Reference II: 106365733 09/29/2017.08:30 Reference II: 106365732	Amount: \$100.00 Used: \$50.00 Amount: \$50.00 Amount: \$50.00 Used: \$25.00 Used: \$25.00
MONEYCODE ACTIVITY 10/16/2017 16:28 Reference 8: 1063660/1 09/29/2017 09:39 Reference 8: 106365733 09/29/2017 08:30 Reference 8: 106365732 09/29/2017 08:30	ISSUECODE T Arnount: 500.00 Uned: 550.00 Arnount: 550.00 Used: 550.00 Arnount: 550.00 Used: 550.00 Arnount: 550.00

MONEYCODE MANAGEMENT

Each check written by a driver/cardholder needs a company-issued MoneyCode to authorize the check. The MoneyCode Management page summarizes MoneyCode usage and activity, and allows you to issue new MoneyCodes.

MoneyCode Summary

MoneyCode Summary totals the MoneyCodes issued today, showing the number of codes, the total dollar amount issued, and the total dollar amount used.



tract
57277 - BARBIE FLEET
ount To Fund
0.00
e To
3C Trucking
es
or Parts
ADO INFO
es x Parts ADD INFO

Issue a New MoneyCode

This page allows you to edit user settings for your online account such as your mailing address, email address, and phone number. All fields are required.

- To issue a new MoneyCode, click Issue Code on the Home or MoneyCode Management page.
- 2. Fill in the form
 - Amount to Fund: Check amount
 - Issue To: The payee the check will be issued to
 - Notes: Optional explanation of the MoneyCode
- 3. Click Issue Code



MoneyCode Activity

Initially this section lists the MoneyCodes issued today, if any. You can view previous MoneyCode transactions and filter the results to find specific data.

The section displays the following transaction information.

Date, Time	Date and time of transaction
Reference #	An internal tracking number
Issued To	The driver/cardholder (or payee) the code was issued to
Code	The issued MoneyCode – Each MoneyCode can only be used once
Amount	Amount issued for that MoneyCode
Used	Amount used – The transaction may be less than the full amount



Show Previous MoneyCodes

Click **Show Previous MoneyCodes** to see the previous ten MoneyCode transactions, ordered by date and time. Click the button again to view additional transactions.

Filter MoneyCode Transactions

The filter searches for your specified search string anywhere within the displayed fields: date, time, code, reference #, amount, issued to, and amount used.

Click the filter icon and type your search term into the box. As you type, the list immediately changes to show only items that contain the characters you typed. For example, **st** finds **Stacy** and **Test**.

MONEY CODE ACTIVITY	
0	
07 25 2017 15:00	Code: 1468891154
Reference #: 113612168	Amount: \$15.00
Issued To: Any Trucker	Used: \$50.00
06/29/2017 11:03	Code: 1563467913
Reference #: 11335200	Amount: \$4.00
Issued To: Stacy Testa	Used: \$0.00
06/28/2017 13:15	Code 0340235580
Reference #: 113347270	Amount: \$50.00
Issued To: Stacy Test	Used: \$0.00

Code: 1023141217 Amount: \$10.00 Used: \$0.00

Code: 3073445222 Amount: \$0.00 Used: \$0.00

MONEY CODE ACTIVITY

07/31/2017 14:21 Reference #: 113668060 Issued To: Jake Tex

05/03/2017 16:39 Reference #: 112816179 Issued To Sacy

0

In this example, **25** finds matches in the date, reference #, and code fields.

- Click Show Previous MoneyCodes to display more results that match the search term
- To clear the search and display all transactions, delete the characters in the search box

<	FLEET ONE	=
CAR	D MAINTENANCE	
Card	708305******0548 CHUN	GE CARD
Statu	s: Active	
Smar	trund Status: Follow	
Polic	y #: 1	
N		
ιο	ND CASH	
CAR	D INFORMATION	
Drive	r ID: 446	
Unit	Number: 446	
Card	holder Name: DENINIS TIERNEY	
CAR	D BALANCES	
	Recurring Cash: \$0.00	
	One Time Cash: \$1,159.88	
	SmartFunds: \$1,027.78	

CARD MAINTENANCE

The Card Maintenance page allows you to find a specific card, view card activity and balances, inactivate (or activate) the card, override card limits, and load cash to the card.

- The first time you use the app, you must click **Select a Card** to begin (see "Card Search")
- After that, the screen shows information for the last card you viewed
- To view information for a different card, click **Change Card** (see "Card Search")

Card Information

- Card Maintenance: card number, card status, and policy #
- Card Information: cardholder name (for active cards)
- Card Balances: the amounts available to the card for recurring cash, one-time cash
- Recent Activity: red indicates debits; blue indicates credits

Change Card Search

The app provides multiple ways for you to find a specific card: by card number, driver ID, driver name, unit, policy, or X-ref number.

- On the Card Maintenance page, click **Change Card** or **Select a Card** (app first use)
- Click the arrow and select what to search. The system remembers your choice, such as Policy

- Type the search term, such as the policy number Click **Search** – The list of cards that matches is displayed
- Click anywhere within a card to select the card and display its Card Maintenance detail page



CARD MAINTENANCE

Policy	- 1	
		SEARCH CANCEL
	Search R	esults
Care	5tatus: Holder Name:	Policy #: 1 Active JOHIN CARDHOLDER
(708305	0028 Status	Policy #: 1 Inactive
208305	00.36 Sutus:	Policy #. 1 Inactive
700000	0044	Policy #: 1

Card Maintenance Tasks

The maintenance tasks you can perform for the selected card depend on the card's current status:

- If the card status is *Active*, you can inactivate the card, override card limits, and load cash
- If the card status is *Inactive* or *Hold*, you can change the card status

Inactivate Card

You can temporarily inactivate an active card while the driver is on vacation, leave, etc.

- 1. To change the status of the card, click Inactivate
- 2. Select the new status for the card
 - Hold: inactivate the card; the PIN is not reset
 - Inactive: inactivate the card and reset the PIN
- 3. Click **OK**
- To restore card use, select the card marked inactive or hold to display the detail Card Maintenance page – See "Change Hold or Inactive Card Status"

Change Hold or Inactive Card Status

- 1. On the detail page of a card with Hold or Inactive status, click **Change Status**
- 2. Select the new status for the card and click **OK**
 - · For an inactive card, the options are Active or Hold
 - For a Hold card, the options are Active or Inactive
 - Active: return the card to full-use status
 - Hold: inactivate the card; the PIN is not reset
 - Inactive: inactivate the card and reset the PIN
- 3. A "Card Updated" message is displayed on the Card Maintenance page, and the status is changed
 - ** Note: When you change the card status from Inactive to Active, the driver/cardholder must create a new PIN. **

Change card status to: # Hold	
 Inactive 	
	OK CANCEL

CHANGE CARD
CHANGE STATUS
OK CANCEL

VERRIDE	CARD
and to Ove	mide: 708305**********0010 Number of uses
1	
OVERIDE	

Card: 708305******0050 Recurring Cash: \$25.00 One Time Cash: \$116.00 Which side of the card do you want to load cash to? Rok One • •
Recurring Cath: \$25.00 One Time Cath: \$116.00 Which side of the card do you want to load cash to? Pick One LOAD CASH
Une Time Cash: \$116.00 Which side of the card do you want to load cash to? Pick One LOAD CASH
Which side of the card do you want to load cash to? Pick One
LOAD CASH
Which side of the card do you want to load cash to? Company One Time Cash
LOAD CASH
Which side of the card do you want to load cash to?
Company One Time Cash •
Amount 10.00
Reference #
1122
Note
For Maintenance
Mich Down Cot
Add Cash Hemove Cash

Override Card Limit (Active Card Only)

- 1. To override the card limit on the number of uses per day, click **Override**
- 2. Enter the number of additional uses allowed today, and click **Override**

The additional uses are only available for the current day.

Load Cash to Card (Active Cards Only)

To load additional cash to the card, click Load Cash

- 1. The screen displays the amount of cash currently available
- 2. Select which side of the card will receive the additional cash: company one-time cash

- 3. Type the amount You don't need to type the \$ or .001 is displayed as \$1.00 Reference # and note are optional
- 4. Click **Add Cash** A confirmation message is displayed, and the amount is added to the card balance
- 5. To remove a portion of a cash advance, enter the amount and click **Remove Cash** to return the cash to the company

TRANSACTION REJECTS	S T
11/01/2017 16:34	708305******0002
REGISTERED CHECK	
Registered check not allow	ed
11/01/2017 16:33	708305******0002
REGISTERED CHECK	
Registered check not allow	ed
10/16/2017 17:08	708305******0028
WACO EXPRESS MART INC	
Invalid location	
FILTER_WALUE	
FILTER_VALUE	
Inter.value	
ransaction Rejects	208305******0
Inter-value Inter-	208305*******0
Intervalue Intervalue ansaction Rejects	208305******0 CD: Trans. Lanse:
Ansaction Rejects	208305******0 ED: Trans. Limit: 208305*******0
Intervalue	208305******0 CD: Trans. Lava: 708305******0
Inter-value Inter-	208305*******0 ED: Trans. Lans: 708305******0 ED: Trans. Lanst:

TRANSACTION REJECTS

The Transaction Rejects page lists each rejected transaction, the transaction type, and the reason for rejection. The list aids you in troubleshooting rejected transactions, such as for a particular card (driver).

You can filter the list to find specific cards, transaction types, dates, etc. The filter searches for your specified search string anywhere within the displayed fields.

- Click the **Filter** button in the right corner to search for a specific value
- Type the search value in the field For letters, use all capitals
 - As you type, the list immediately changes to show only items that contain the characters you typed
 - For example, **EX** finds all transactions with EXCEEDED
- Click **Show More** to display more results that match the search term.
- To clear the search and display all transactions, delete the characters in the search box

SETTINGS

The Settings page allows you to change your name, cell phone number, and email address.

- Click in a field and make changes as needed
- Click Save Changes. A confirmation message is displayed

SER SETTINGS		
ser Name		
700233		
rst Name		
John		
ast Name		
Smith		
ell Phone		
(555) 555-5555		
Mail Address		
john.smith@gmail.co	om	
	-	

Contact Information

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