



## MILLENNIUM WEXONLINE – Quick Step Document

### State of Indiana Agency Guide As of 09/26/2013

#### HOME PAGE

##### *Summary*

The Homepage is the first screen you will see after you login. From the Homepage, you can:

- View News & Events.
- View Important Information, including Pending Online User Requests, and Flexible Exception Report Notifications.
- Search for and view Accounts via the Account Explorer Tool.
- Global Search feature at top allow you to locate a Card or Driver Record based on filter options.

## **FLEET MANAGER**

### ***Summary***

The Fleet Manager dashboard contains the tools essential for day-to-day management of your fleet card program. You will access this module in order to manage cards, drivers, vehicles, and authorization profiles. In addition, if you receive your invoice via the online application, you will find it located within this module.

### ***Add Vehicle/Asset Card***

**Step 1:** Shortcuts > Cards > Add Vehicle/Asset Card or click Add Vehicle/Asset Card within the Cards tile in the main body of the page. The application will display the Add Vehicle Card page.

**Step 2:** Enter Vehicle Information. Fields marked with an asterisk (\*) are required.

**Step 3:** Select an Authorization Profile from the list of values. To see the details for an Authorization Profile, click View Selected Profile.

**Step 4:** Enter Card Shipping Information including address and carrier method. The application will provide the default shipping information, as it is stored on the account.

**Step 5:** Click Add Another if you have additional Vehicle/Asset Cards that you'd like to include in this shipment, or click Apply to proceed with ordering the single card. Once you have clicked Apply, the application will render a confirmation page.

**Step 6:** Click Back to Cards to navigate to a list view of your cards, or click Back to Account to navigate to the Account Details page.

### ***View Cards***

To view the cards on a particular account, go to Shortcuts > Cards > View Cards or click View Cards within the Cards Tile. From this screen, you can view all cards, search for certain types of cards, and perform card maintenance activities, including clone, edit, change status, change profile, reissue or terminate.

### ***Clone Card***

The Cloning feature allows you to create a new card that will have similar attributes to an existing card, without starting from scratch.

**Step 1:** Click Clone under Actions beside the desired card. You will be presented with information associated with that card in the standard add card screen, which can be edited to create your new card.

**Step 2:** Follow steps outlined in the “Add Driver Card” or “Add Vehicle/Asset Card” sections.

### *Edit Card*

This function allows you to view information associated with a card, and edit that information as needed.

**Step 1:** Click Edit under Actions beside the desired card. The application will render the Edit Card page.

**Step 2:** Make any necessary updates in the fields provided. Click Finish to apply your changes. Once you click Finish, the application will render a confirmation page.

**Step 3:** Click Back to Cards to navigate to a list view of your cards, or click **Back to Account** to navigate to the Account Details page.

### *Change Card Profile*

This function allows you to move a card from one Authorization Profile to another Authorization Profile.

**Step 1:** Click Change Profile under Actions for the desired card. The application will render the Change Profile page.

**Step 2:** View card information to ensure you've selected the correct card.

**Step 3:** Select a new Authorization Profile from the Available Profiles list of values. If you need to review the parameters of the profile you are considering, click View Selected

**Step 4:** Click Finish to complete the profile reassignment. Once you have clicked Finish, the application will render a confirmation page.

**Step 5:** Click Back to Cards to navigate to a list view of your cards, or click Back to Account to navigate to the Account Details page.

### *Reissue Card*

This function allows you to reissue a lost, stolen, or damaged card. Note: Lost or Stolen cards will be immediately terminated to prevent fraud. Damaged cards will remain active for 14 days, to allow you to continue to use them until your replacement cards arrive.

**Step 1:** Click Reissue under actions for the desired card. The application will render the Reissue Card page.

**Step 2:** Select a Reason for Reissue from the list of values.

**Step 3:** Edit Card Shipping Information, if necessary.

**Step 4:** Click Apply to complete reissue. Once you have clicked Apply, the application will render a confirmation page.

**Step 5:** Click Back to Cards to navigate to a list view of your cards, or click Back to Account to navigate to the Account Details page.

### ***Terminate Card***

This function allows you to terminate a card, which renders it permanently unavailable for use.

**Step 1:** Click Terminate under Actions for the desired card. The application will render the Change Card Status page, with the New Status set to Terminated.

**Step 2:** Click Apply to terminate the card. Note: Termination is final.

**Step 3:** Once you have clicked Apply, the application will render a confirmation page.

**Step 4:** Click Back to Cards to navigate to a list view of your cards, or click Back to Account to navigate to the Account Details page.

### ***Managing and Adding Drivers***

#### ***Add Driver***

**Step 1:** Shortcuts > Drivers > Add Driver or click Add Driver from the Drivers Tile on the Fleet Manager Account Summary page. The application will render the Add Driver page.

**Step 2:** Enter Driver Information. Fields marked with an asterisk (\*) are required. Note: If your account has not been setup to auto-generate a Prompt ID, you will need to enter a unique ID for each driver.

**Step 3:** Click Add to save the new Driver information. Once you click Add, the application will render a confirmation page

**Step 4:** Click Add Another if you have additional drivers that you'd like to add. Click Back to Drivers to navigate to a list view of all the Drivers associated to the account in focus. Click Back to Account to return to the list view of your accounts.

#### ***View Drivers***

**Step 1:** Shortcuts > Drivers > View Drivers or click View Drivers within the Drivers tile on the Fleet Manager Account Summary page. The application will render a list view of all the Drivers associated to the account in focus.

**Step 2:** To search for a particular Driver, you may use the Search Filter that is offered above the list view. You may also use the Global Download function to retrieve a listing of all your Drivers in a .csv or .xls format.

**Step 3:** To view the details for a particular Driver, you may click on the hyperlinked Driver Last Name. The application will render the Driver Detail page.

#### ***Edit Driver***

**Step 1:** From the list view of Drivers associated to the account in focus, click Edit beside the desired Driver. The application will render the Edit Driver page.

**Step 2:** View the Driver information and edit fields as necessary by adding new text or overwriting existing text.

**Step 3:** Click Apply to save your updates. Once you click Apply, the application will render a confirmation page.

**Step 4:** Click Back to Drivers to return to the list view of the Drivers associated to the account in focus, or click Back to Account to return to the Account Summary page.

### ***Clone Driver***

**Step 1:** From the list view of Drivers associated to the account in focus, click Clone beside the desired Driver. The application will commence through the Add Driver workflow, allowing you to edit the fields, as needed.

**Step 2:** View the Driver information and modify fields as needed. Fields marked with an asterisk (\*) are required. (Note: Your account settings determine if create your own Prompt IDs or if the application generates them automatically for you.)

**Step 3:** Click Add to save the information on your new Driver. Once you click Add, the application will render a confirmation page.

**Step 4:** Click Add Another if you have additional Drivers that you'd like to add. Click Back to Drivers to navigate to a list view of all the Drivers associated to the account in focus. Click Back to Account to return to the list view of your accounts.

### ***Change Driver Status***

This function allows you to terminate an active Driver or activate a previously terminated Driver.

**Step 1:** From the list view of Drivers associated to the account in focus, click Change Status beside the desired Driver. The application will render the Change Driver Status page.

**Step 2:** Select desired status from the New Status list of values.

### ***Terminate (Inactivate) Driver***

**Step 1:** From the list view of Drivers associated to the account in focus, click Terminate beside the desired Driver. The application will render the Change Driver Status page, with the New Status set to Terminated.

**Step 2:** Click Apply to save the new. Once you click Apply, the application will render a confirmation page.

**Step 3:** Click Back to Drivers to navigate to a list view of all the Drivers associated to the account in focus. Click Back to Account to return to the list view of your accounts.

## **RESOURCE TOOL**

### *Summary*

The Resource Tools feature offers you various, commonly-requested reporting tools to help you to locate sites where your fleet card can be used, to assist you in finding diesel and alternative fuel sites, and to direct you to locations with the lowest price per gallon.

***\*\*\*There is a [Help Menu \(blue link\)](#) that provides detailed step-by-step instructions for every task within the Module. \*\*\****