

USERS' GUIDE FOR FUEL & ODOMETER DATA ENTRY AND MANAGEMENT

General. The purpose of this guide is provide assistance with tracking fuel consumption and the related costs. It covers; the review and correction of downloaded WEX fuel transactions; creating Fuel Records (primarily associated with use of bulk fuel); how to view, edit or delete fuel records; and how to use the Bulk Mileage entry tool.

Pre-Conditions: User has a user account in FleetWave (either via Single Sign On (SSO) or the NON-SSO FleetWave site); User has appropriate role & associated permissions for this functionality

NOTE: It is intended that fuel transaction data from WEX fuel card purchases will be downloaded nightly and that fuel and odometer data from those transactions will populate fuel and odometer records in FleetWave.

THEREFORE:

- a. Only fuel NOT put into vehicles via WEX should require manual entry;
- b. WEX transactions that “error out” will be identified and require editing and/or deleting and “reprocessing”
- c. care must be taken to avoid duplicating downloaded WEX transactions with manual entries;
- d. odometer readings are updated via work orders and fuel transactions as well as “manual” updates.

Review and edit or delete WEX fuel transactions

For Info: FleetWave puts WEX transactions through a “Preprocessor” that compares WEX provided Vehicle IDs (VINs), fuel type, and recent odometers to existing FW data and where mismatches occur, transactions remain in the “preprocessor” to be corrected (or deleted) then reprocessed. During “reprocessing” when match requirements are satisfied, the corrected transaction record is “applied” to the vehicle.

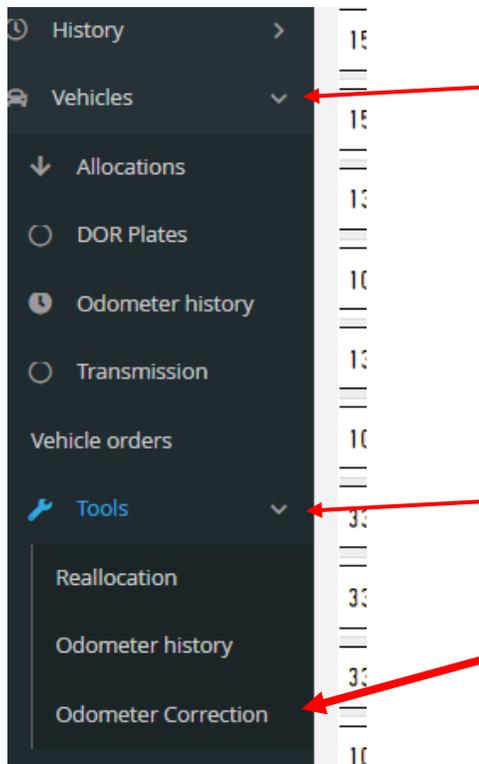
- Navigate to the “Fuel” module (which lists fuel transactions from the last 90 days). Alternatively navigate to “All Fuel” which lists all transactions.
- In top filter ribbon, below “Fuel”, change “Normal” to the filter of interest (filters are: Fuel Type Not Recognized; Unknown Vehicle; or Invalid Odometer)
- For FUEL TYPE NOT RECOGNIZED: scan transactions and mark those that are obvious “nonfuel” transactions like “WASH” (Quantity of 1, cost of \$2 - \$12); OIL; OIL CHANGE, etc. Be CAREFUL with those marked “MISC” because sometimes stations miscode. A “MISC” transaction that looks like it was most likely to be fuel, probably is and requires research/reviewing the pump receipt.
 - Check (tick box to left) those obvious “non fuel” transactions. IF IN DOUBT, LEAVE AND OPEN TO REVIEW MOMENTARILY;
 - Delete those transactions by clicking on the “X”

- Open each remaining “FUEL TYPE NOT RECOGNIZED” transaction and either correct the error or delete the transaction. NOTE: Non Fuel transactions (like “Wash” and “SVC”) are included in the download from WEX and show up as Fuel Type Not Recognized errors. These can be deleted by clicking the box to the left then the “X” at the top right.
- For Fuel Type errors where the transaction was fuel, but the merchant miscoded, refer to the pump receipt if possible, or correct the fuel type and quantity (as necessary) to reflect the type and quantity of fuel the vehicle uses/used.

The screenshot displays the FleetWave Fuel management interface. The main window shows a table of fuel transactions. A dropdown menu is open over the 'Fuel Type' column, showing options like 'Fuel Type not Recognized (357)', 'Invalid Odometer (797)', and 'All bad records (2044)'. A 'Reprocess' button is visible at the bottom of the dropdown. Annotations include a box labeled 'Select All Tick Box' pointing to the checkbox in the first row, a box labeled 'Transaction Tick Box' pointing to the checkbox in the second row, and a red arrow pointing from the 'Reprocess' button to the 'Fuel' menu item in the left sidebar.

- Click “Reprocess” in the fuel header ribbon to rerun the corrected transactions through the FleetWave preprocessor and validation process. This will move the corrected transactions from the error categories to “Normal” (if not done in the step above)
- For “INVALID ODOMETER” errors, determine the issue along with an accurate odometer and correct the odometer entry/reading either in the transaction or in some situations in the vehicle history where a “bad” odometer was entered or imported in the past. Common odometer problems are: Driver enters incorrect odometer at the pump (fix in transaction); Odometer in vehicle history incorrect so is higher than current odometer (fix using Vehicle Odometer Correction tool); fuel card used was for a different vehicle so odometer is out of sequence (fix in the transaction).
 - Sort by Vehicle ID (this groups transactions associated with each vehicle together. OFTEN, fixing one of the entries for a particular vehicle will fix all of them for that vehicle)

- Review the “Import Issue” descriptions of the error transactions
 - For errors where the “Odometer is lower than an earlier reading” the fix will most likely be done in the “Odometer Correction Tool”



- For errors where the error is “Large Odometer Jump”, the fix will most likely be done in the Transaction itself
- Select an “INVALID ODOMETER” vehicle/transaction to correct
 - If the odometer is a “large jump” situation, open the transaction
 - “EDIT” the transaction
 - Enter the correct odometer and SAVE. NOTE: FleetWave has a built in edit that checks the driver list and displays a popup if the field is blank or there is not a driver match. IT IS POSSIBLE TO SIMPLY CLEAR THE FIELD, CLOSE THE POPUP OF DRIVERS, AND SAVE.
 - If the odometer is “lower than previous”
 - Copy the vehicle ID
 - Navigate to the “ODOMETER CORRECTION” tool
 - Paste the vehicle ID into the selection criteria field and “Search” (Optionally specify a period of Interest)
 - Locate the “bad” odometer and correct it
 - Save

➤ Review the progression of odometer readings for accuracy

Odometer Correction Tool

The Odometer Correction Tool is designed to help you search a vehicle's odometer entries and make relevant corrections.

Vehicle ID
Enter the Registration Number of the Vehicle you wish to correct

Period
Search for meter readings entered in a particular date range or alternatively leave it blank for all odometer entries

Odometer
The most current reading of this vehicle's odometer

- Click “Reprocess” in the fuel header ribbon to rerun the corrected transactions through the FleetWave preprocessor and validation process. This will move the corrected transactions from the error categories to “Normal” (if not done in the step above)
- Recheck to see if errors were corrected.
- For “UNKNOWN VEHICLE” transactions, there are three common causes of this error. (**NOTE:** FleetWave uses the last eight characters of the VIN that is in the VIN field of the WEX card profile to “match” with the FleetWave vehicle ID and apply fuel & odometer data to a specific vehicle).
Common causes of the error:

- There is *no VIN in the WEX Card profile* used to make the vehicle purchase. These will display a blank or --- in the Vehicle ID column.

IF/WHEN THE TRANSACTION IS FROM A WEX CARD THAT IS/WAS USED FOR RENTALS, FUELING EQUIPMENT (like lawn mowers), OR NURSE TANKS OR OTHER NON-VEHICLE SITUATION, THESE TRANSACTIONS CAN SIMPLY BE DELETED. IT IS HIGHLY RECOMMENDED THAT THE CARD PROFILE FOR THOSE TYPES OF CARDS BE EDITED SO THE VIN FIELD CONTAINS AN IDENTIFIER THAT QUICKLY COMMUNICATES THAT THE CARD. For example: FMDCMOWER0001

IF/WHEN the transaction should be applied to a vehicle: 1)determine what vehicle the fuel went into; 2)edit the transaction and insert the correct vehicle ID; 3)save the record.

- The *VIN in the WEX Card Profile is for a vehicle that is not found in FleetWave*. This typically occurs when a card is passed from an old vehicle to a new replacement without updating the vehicle information, including the VIN, in the WEX card profile.

CORRECT BY: 1) Determining the vehicle the fuel actually belongs to; 2) Editing the transaction(s) to correct the Vehicle ID associated with the transaction; 3) Editing the WEX card profile so the VIN there matches with the VIN in FleetWave in order for future transactions to be applied to the correct vehicle.

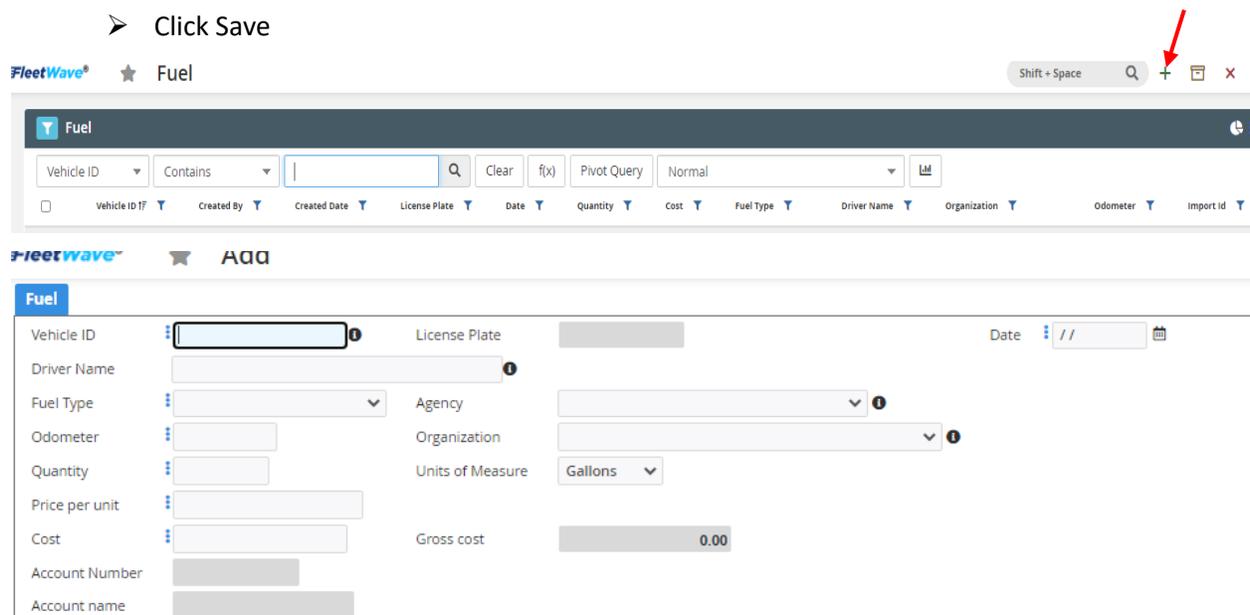
- There is an error in the last eight characters of the VIN in the WEX card profile so there is no match with the vehicle's FleetWave Vehicle ID.

CORRECT BY: 1) Determining the vehicle the fuel actually belongs to; 2) Editing the transaction(s) to correct the Vehicle ID associated with the transaction; 3) Editing the WEX card profile so the VIN there matches with the VIN in FleetWave in order for future transactions to be applied to the correct vehicle.

Creating Fuel Records NOT involving WEX cards

NOTE: These fuel purchases typically involve bulk tanks and the fuel that goes into vehicles from them. THERE IS NO REQUIREMENT TO ENTER TRANSACTIONAL DETAIL FOR THESE SITUATIONS. Monthly totals are acceptable.

- Navigate to Fuel by clicking on 'Fuel' on the left side menu; OR,
- Navigating to "Vehicles" on side menu,
- *TO ENTER FUEL RECORDS VIA THE FUEL MODULE*
 - Click on '+' button on upper right-side corner
 - Enter the Vehicle ID (Alternatively, enter the vehicle license number then tab, and automatic lookup of the vehicle ID occurs)
 - Enter the fuel acquisition information (date of purchase, fuel type, odometer, quantity, and cost. Price per unit auto calculates. Driver name is optional, but if used must be a valid driver from the "Drivers" table.
 - Click Save



The screenshot shows the FleetWave interface for entering a fuel record. At the top, there is a search bar with a '+' button highlighted by a red arrow. Below this is a 'Fuel' form with various input fields:

- Vehicle ID:** A text input field with a dropdown arrow on the left and an information icon on the right.
- License Plate:** A text input field.
- Date:** A date picker field.
- Driver Name:** A text input field with an information icon.
- Fuel Type:** A dropdown menu.
- Agency:** A dropdown menu with an information icon.
- Odometer:** A text input field.
- Organization:** A dropdown menu with an information icon.
- Quantity:** A text input field.
- Units of Measure:** A dropdown menu set to 'Gallons'.
- Price per unit:** A text input field.
- Cost:** A text input field.
- Gross cost:** A text input field showing '0.00'.
- Account Number:** A text input field.
- Account name:** A text input field.

At the bottom of the form, there is an 'ADD' button.

- TO ENTER FUEL VIA THE VEHICLES > FUEL TAB

- At the Vehicles “browse screen, search for the vehicle of interest and click on it;
- Go to the “Fuel” tab
- Click on ‘+’ button on the right of the embedded “Fuel” window.
- Enter the fuel acquisition information.
- Click Save

The screenshot displays the vehicle management interface. At the top, a navigation bar includes tabs for Specification, PM/Inspection, Allocation & Assignment History, Fuel Cards, Fuel, Accidents, Assets, Work Orders, Procurement, Lease, Disposal, and Auditing. The 'Fuel' tab is highlighted with a red arrow. Below the navigation bar, a vehicle profile is shown with fields for Vehicle ID (7B251556), License Plate (220245M), Inventory Number (52222), Vehicle status (INITIAL ENTRY), and Confidential plate. The vehicle description is 'Year: 2007 Make: DODGE Model: CARAVAN'. The organization is '650N000 (NWM-NORTHWEST MO PSYCH REHAB)' and the assignment name is 'ACTIVITIES'. The assignment type is 'Pool Vehicle'.

Below the vehicle profile, the 'Fuel' window is embedded. It features a search bar with 'Filter Columns', 'Contains', and a search icon. Below the search bar is a table with columns: Date, Quantity, Cost, Fuel Type, Price per unit, Organization, and Odometer. The table contains two rows of fuel purchase data:

Date	Quantity	Cost	Fuel Type	Price per unit	Organization	Odometer
3/31/2021	8.00	18.72	UL	0.0000	650N432	0.0
3/31/2021	0.00	0.00	ODO	0.0000	650N432	85900.0

Below the table, the 'Fuel' entry form is displayed. It includes fields for Vehicle ID (7B251556), License Plate (220245M), Date (//), Driver Name, Fuel Type (Unleaded Regular), Agency (650 (DEPT OF MENTAL HEALTH)), Organization (650N000 (NWM-NORTHWEST MO PSYCH REHAB)), Units of Measure (Gallons), Odometer (85900.0), Quantity, Price per unit, Cost, Gross cost (0.00), Account Number, and Account name. The fields for Fuel Type, Odometer, Quantity, and Cost are circled in red. A red arrow points to the 'Date' field.

NOTES: Driver Name on the fuel purchase/record is NOT MANDATORY and must match a driver in the FW Driver database. If a driver popup appears upon tabbing, simply close the popup and proceed.

For those doing monthly fuel entries of owned bulk fuel, use the last day of the month, and the odometer on that date for the date and odometer. If there has been an odometer update since the date of fuel entry, it may be necessary to adjust the odometer to the current reading.

To View, Edit or Delete Fuel Records

- Navigate to Fuel by clicking on 'Fuel' on the left side menu or via the Vehicles > Fuel tab > embedded Fuel window.
- Select a record to view, edit or delete.
- Once done viewing (without Edit or Delete) click 'Cancel'.
- System directs user to 'Fuel' browse screen or back to the Vehicles > Fuel screen.

OR to edit

- Once user has navigated to 'Fuel' and selected a record to edit,
 - Clicks on 'Edit' button of the selected record.
 - Make changes and attach documents if required.
 - Click 'Save'
 - System directs user to 'Fuel' browse screen.

OR to delete a record

- Once user has navigated to 'Fuel', use can select a record or records to delete:
 - Tick record(s) for deletion as appropriate;
 - Click on 'X' or  button on upper right side corner;
 - System asks "Delete Record" (for X) or Archive Record(s) (for );
 - Click 'OK' or 'Cancel' button;
 - System performs the action specified;
 - System directs user to Fuel browse screen.

To Enter Bulk Mileage Records

Note: This tool facilitates entering odometer readings for multiple vehicles in "one sitting" rather than needing to navigate from one vehicle profile to the other. PLEASE REMEMBER that IF fuel transactions are downloading from WEX, this odometer entry process should not be necessary. BUT for those with bulk fuel tanks, and not using WEX cards it could be very useful.

- Navigate to left side menu and click on Favorites > Bulk Mileage.
- Select 'Organization' and 'Agency' from drop down menu.
- Click 'Search'.
- System shows all vehicles related to that Agency and Organization.
- Navigate to the "Odometer Date" field and enter the date of the odometer reading to be entered. (Tip: use Microsoft "hot" key CTRL C to copy the date, then paste into subsequent date fields)

- Move (tab) to the “Odometer” field and enter the new odometer
- Move (tab) and system “ticks” the vehicle for saving, and navigates to the next vehicle “Odometer Date” field
- Continue entering data, tabbing and moving, or locating vehicle(s) and entering data, until complete
- Skip any vehicles not being updated, or remove odometer date and reading info and vehicle becomes “unticked”
- Click ‘Save’.
- Unticked Vehicles/vehicles without new data will not be saved
- FleetWave identifies an errors where the odometer entered is lower than previous odometers. Correct as necessary.
- Upon saving, those recently entered fields become Read only ‘Previous Odometer Date’ and ‘Previous Odometer’ fields and user can now repeat the process to add subsequent “new” ‘Odometer Dates’ and ‘Odometer’ readings
- Unticked Vehicles/vehicles without new data will not be saved
- Successfully creates Fuel record by entering necessary data.
- Successfully view and edit or delete record with data.
- Successfully capture odometer reading by adding necessary data in the system
- Successfully enter odometer readings (mileage) for multiple vehicles “in bulk”.