FleetNet
Fleet Manager Quick Reference Guide

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Hardware/Software Requirements

FleetNet is an Oracle-based Java application that requires you to download a small application to your computer.

Review the specifications below to make sure that your computer will be able to display FleetNet appropriately. PC configurations with less than the recommended requirements will likely encounter degradation in the performance of the FleetNet application.

Operating System:	Windows 98, 2000, XP, or Windows NT 4.0 (with the latest Service Packs, and with the rights to add programs)
CPU:	Pentium Class Processor
RAM:	Minimum of 64 MB of Random Access Memory (RAM)
Browser:	Microsoft Internet Explorer (IE) Version 5.5 or Higher with Java enabled (Java is available at http://www.java.com). If you are using an earlier version of IE, you will need to upgrade before using FleetNet. A free upgrade to IE version 6.0 is available from Microsoft. Go to the web site at http://www.microsoft.com/ and click on the link for "More Downloads." The next screen will list the software available for download. Click on the link for Internet Explorer 6 and follow the instructions to download and install the software.
Report Reader Software:	Adobe Acrobat Reader Version 5.01 or Higher. Adobe Acrobat is widely used and trusted free software that facilitates viewing and printing of invoices and reports online. It will not affect other PC or browser functions. If you do not have it, you can download a free copy at http://www.adobe.com/
Hard Disk Space:	For Internet Explorer, 50 to 185 MB or more of hard disk space will be needed depending on installation preferences. In addition, approximately 15 MB of hard disk space will be needed for Adobe Acrobat Reader and associated programs.

Web Connectivity:	Broad bandwidth TCP/IP connection to the Internet. FleetNet is web-based, so a fast, stable connection to the Internet is the most important performance factor. A high-speed connection such as Ethernet, DSL, cable modem, or T1 is recommended.

Notes:

- If you have a pop-up blocker enabled on your computer, FleetNet will not function correctly. You will not be able to display reports or the on-line help files. Set your pop-up blocker to allow pop-ups from the addresses http://www.fleetnet.net and http://www.fleetdetails.com.

- Some FleetNet users may receive the following error when attempting to access http://www.fleetnet.net/ :

  "FRM-92060: Failed to connect to server. Bad machine specification http://www.fleetnet.net:9402/"

  To correct this problem, check the following:

  - Your network Firewall must have port 9402 open
  - The Firewall should be configured to allow traffic to I.P. address 206.107.70.7 (http://www.fleetnet.net/).

Accessing FleetNet

Steps:

- Access FleetNet via the Internet at http://www.fleetnet.net. The User Login Window will appear.
- Enter your User Name, as defined by your administrator (mandatory).
- Enter your Password, provided by your administrator (mandatory).
- Press the LOGIN button. If you are a new user, you must change your password.

Notes:

- Some users experience difficulty trying to access FleetNet. If this happens to you, access FleetNet at http://www.fleetnet.net/index_sjvm.html.

  If Sun's JAVA Virtual Machine has not been loaded on your PC, this will download the appropriate VM software from the Sun web site. Then the FleetNet login process will continue.

- If you enter an incorrect password 10 consecutive times, your FleetNet account will immediately be deactivated. Contact your system administrator to reactivate the account.

Changing Your Password

Steps:

- If you have logged into FleetNet for the first time, the Change Password screen will appear automatically.

  Otherwise, select CHANGE PASSWORD on the User Login Window.
- Enter your Old Password.
- Enter a New Password.
- Re-enter the new password for verification.
- Press the OK button to accept the new password. You will receive a confirmation email.

Notes:

- Previously used passwords cannot be reused.
- The password must contain at least six characters, and a maximum of 10. The password must contain at least one numeral (0-9).

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- The password must not contain special characters such as the following: ! & _ % ? $
- The password must not contain the User Name or any spaces.

Online Help

Once you are logged in to FleetNet, there is extensive online help available.

Access the help from any screen by clicking on the Help menu, and selecting Online Help. Help will appear for the screen that you are using.

Change Customer Data

Fields available to update:

- Physical Address.
- Phone and Fax numbers.
- Contact and Contact's email address.

Steps:

- If you are not on the Customer screen, select Customer -> Find from the drop-down menu.
- Highlight the Customer and press the UPDATE button.
- Enter data on the Customer Detail tab.
- Press the SAVE button.
- Select "OK" when asked to confirm.

Notes:

- Hit <Tab> after each entry to move to the next available data entry field.
- You can cancel changes by selecting "CLEAR" rather than "SAVE".

Add An Employee

Data required:

- Employee Name and Employee Number.
- Vehicle Limit Type (All Vehicles, By Dept, One Vehicle).

Steps:

- Select Employee -> Add from the drop-down menu.
- Enter data on the Employee Detail tab.
- Press the SAVE button.
- Select “OK” when asked to confirm.

Notes:

- Hit <Tab> after each entry to move to the next available data entry field.
- After you press SAVE, the PIN is generated and can be used immediately by the employee. You might want to jot the PIN down.
- Vehicle Limit Types:
  - Vehicle ID is mandatory if Limit Type is ONE.
  - Department ID is mandatory if Limit Type is DEP (FleetCor should have set up the available departments for you).
- You can cancel changes by selecting “CLEAR” rather than “SAVE”.

Change Employee Data

Fields available to update:

- Employee Name and Employee Number.
- Vehicle Limit Type (All Vehicles, By Dept, One Vehicle).
- Lock Code and Lock Reason Code.

Steps:

- Select Employee -> Find from the drop-down menu.
- Enter search criteria.
- Press the RETRIEVE button.
- Highlight Employee and press the UPDATE button.
- Enter data on the Employee Detail tab.
- Press the SAVE button.
- Select “OK” when asked to confirm.

Notes:

- Hit <Tab> after each entry to move to the next available data entry field.
- You can cancel changes by selecting “CLEAR” rather than “SAVE”.

Copy Employee or Vehicle Data for Multiple Entries

Steps:

- Select Employee -> Find or Vehicle -> Find from the drop-down menu.
- Enter search criteria.
- Press the RETRIEVE button.
- Highlight the employee or vehicle you wish to copy and type in needed changes (such as name, description, ID) to the Details or Limits tabs.
- Press the SAVE button.
- Select “OK” when asked to confirm.

Notes:

- This function is typically used when you have several employees or vehicles to enter with similar data. You can copy an existing record and make needed changes.

Add a Vehicle

Data required:

- Customer ID.
- Vehicle Number and Description.
- Vehicle Class ID (only if Class IDs are set up for you).
- Product ID to which the card is limited, and whether product violations should be reported or denied.
- Day/Time Restrictions, and whether these violations should be reported or denied.
- Department ID (if Departments were set up and this card is to be assigned to a Department).
- Sub Department ID (if customer determines a sub-department is needed).
- Whether odometer entries are required.
- Expected MPG and Expected Range.
- Report and Denial Limits:
  - Daily and Weekly gallon limits.
  - Weekly Supplies, Services and Miscellaneous Purchases spending limits.
  - Transactions allowed per day.
  - Tank Limits.

Steps:

- Select Vehicle -> Add from the drop-down menu.
- Enter data on the Detail and Limits tabs.
- Press the SAVE button.
- Select “OK” when asked to confirm.
- When you save a new vehicle, you will be asked if you want to issue a card for the vehicle. The card number will appear in a pop-up window. Select “OK” if you wish to issue the card.

Notes:

- To Select “All Fuel Types” for Product Restriction, leave the field blank. Sometimes this blank field appears as a “0” (the null value).

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- If a Report Limit is met, a notification can be sent to the e-mail address on the Customer Detail tab.
- Once a Denial Limit is met, transactions will be denied.
- Hit <Tab> after each entry to move to the next available data entry field.
- You can cancel changes by selecting “CLEAR” rather than “SAVE”.

Change Vehicle Data

Fields available to update:

- Vehicle Number and Description.
- Vehicle Class ID.
- Employee ID.
- Product ID to which the card is limited, and whether product violations should be reported or denied.
- Day/Time Restrictions, and whether day/time violations should be reported or denied.
- Department ID.
- Sub Department.
- Odometer Required.
- Expected MPG, and Expected Range.
- Report and Denial Limits.
  - Daily and Weekly gallon limits.
  - Weekly Supplies, Services and Miscellaneous Purchases spending limits.
  - Transactions allowed per day.
  - Tank Limits.

Steps:

- Select Vehicle -> Find from drop down menu.
- Enter search criteria.
- Press the RETRIEVE button.
- Highlight vehicle and press the UPDATE button.
- Enter data on the Detail and/or Limits tabs.
- Press the SAVE button.
- Select “OK” when asked to confirm.

Notes:

- Hit <Tab> after each entry to move to the next available data entry field.
- You can cancel changes by selecting “CLEAR” rather than “SAVE”.
- Card Type is a populated field and cannot be created or changed by Customer-level users.

Lock or Unlock a Card

Steps:

- Select Vehicle -> Find from the drop-down menu.
- Enter search criteria.
- Press the RETRIEVE button.
- Highlight the specific vehicle whose card you wish to lock or unlock. Select Vehicle -> Lock or Vehicle -> Unlock from the drop-down menu.
- If you are locking a card, select a Lock Reason code.
- Select “OK” when asked to confirm.

Notes:

- When you unlock a card, you do not need a Lock Reason code.

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Replace a Card

Definition of Replace:

Replacing a card means that an existing card will be permanently locked and replaced with a new card/number. The old card number cannot be retrieved for research or reissue once the card has been replaced. Use this function to replace a card that has been lost, stolen or suspected of misuse. The vehicle’s history will remain with the vehicle record and the new card number.

Steps:

- Select Vehicle -> Find from the drop-down menu.
- Enter search criteria.
- Press the RETRIEVE button.
- Highlight Vehicle and select Vehicle -> Replace from the drop-down menu.
- To confirm that you wish to replace this card, select “Continue”
- A new card number will be provided in a pop-up box. Select “OK”.

Reissue a Card

Definition of Reissue:

Reissuing a card means that an existing card will be reprinted without changing any original data. This function is typically used when a card has been destroyed, but the employee is still using the card and associated data. You should only use this function if the original card is in your possession. Once the new card is received, destroy the old card.

View a Report or Invoice/Statement

Standard Reports Available:

Invoice/Statement

Fleet Fuel Management Report

Optional Reports Available:

Employee Management Report

Vehicle Management Report

Fleet Analysis Report

Fleet Fuel Management Report

Fleet Maintenance Management Report

Customer Tax Management Report

Federal Gasoline Excise Tax Report

Federal Diesel Excise Tax Report

Steps:

- Select Reports from the drop-down menu.
- Select the desired Customer Name, report Effective Date, and Report Name.
- Press the VIEW REPORT button.

Notes:

- The report launches in Acrobat Reader. You must have that program installed on your computer to view a report. (You can download the program for free at http://www.adobe.com)
- The reports and invoices are available on-line for 3 months. Older reports must be requested through your Customer Service Representative.
- If you are interested in ordering Optional Reports, contact your Customer Service Representative.

Set Up a New User

Steps:

- Select User -> Add from the drop-down menu.
- Enter User Name, Description, E-mail, and Phone Number of user.
- Select the user’s Role.
- Press the SAVE button.
- Select “OK” when asked to confirm.

Notes:

- User Name typically is the user login name (JSMITH), versus the person’s name. This name must be unique among all of the users of FleetNet. If you enter a User Name that is already in use, you’ll receive a “unique constraint violation” message. Try a different User Name (JSMITH2, for example).
- The Description is typically the full name of the user (JOHN SMITH).

- You are set up as one of the following security roles:
  - Fleet Manager. This user can view all of the screens and can add or update Employee and Vehicle records. This user can add users with the three following roles.
  - Customer-level Admin 1. This user can view all of the screens and can add or update Employee and Vehicle records.
  - Customer-level Admin 2. This user can view all of the screens.
  - Fleet Level user. This user can only view his or her reports.

View Transactions

Steps:

- Select Transaction -> Find from the drop-down menu.
- Enter search criteria (or leave blank for all transactions).
- Press the RETRIEVE button.
- Highlight transaction. Either double-click, or select the "Transaction Detail" tab.

Find Fueling or Maintenance Sites

Steps:

- Select Site -> Find from the drop-down menu.
- Enter search criteria.
- Press the RETRIEVE button.
- Press the "Go To Site Map" button on the Site Detail tab to see site map information.

For site listings with maps, see http://www.fleetcor.com.

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Download Transactions

Steps:

- Select Download-> Transactions from the drop-down menu.
- Select a Customer Name.
- Select a range of transactions.
- Optionally, check the Search by Vehicle or Employee box. Then select "By Vehicle Number" or "By Employee Number", and enter or select the number.
- If you are going to download data (versus view a report) and you would like the data to contain column headers, check the Show Headers box. Otherwise, leave the box blank.
- Press the View Report or Download Data button.
- Press the Continue button when asked to confirm.

Notes:

- If you chose the View Report option, the information will display as a .PDF file in a browser window. Use your browser's Print mechanism if you wish to print the file.
- If you chose the Download Data option, the information will display in a browser window. Use your browser's Save As mechanism to save the file to your computer.

Download Card Information

Steps:

- Select Download-> Cards from the drop-down menu.
- Select a Customer Name.
- Optionally, enter the first and last Card Numbers in the From and To boxes.
- Optionally, check the Status box and select Active or Inactive.
- If you are going to download data (versus view a report) and you would like the data to contain column headers, check the Show Headers box. Otherwise, leave the box blank.
- Press the View Report or Download Data button.
- Press the Continue button when asked to confirm.

Notes:

- To return card information up to and including a certain Card Number, leave the From box blank and enter the last Card Number in the To box. Similarly, to return card information for all Card Numbers after (and including) a certain number, enter the first number in the From box and leave the To box blank.
- If you chose the View Report option, the information will display as a .PDF file in a browser window. Use your browser's Print mechanism if you wish to print the file.
- If you chose the Download Data option, the information will display in a browser window. Use your browser's Save As mechanism to save the file to your computer.

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Download Vehicle Information

Steps:

- Select Download-> Vehicles from the drop-down menu.
- Select a Customer Name.
- Optionally, enter a Date Created.
- Optionally, enter a Date Updated.
- Optionally, check the Status box and select Locked or Unlocked.
- If you are going to download data (versus view a report) and you would like the data to contain column headers, check the Show Headers box. Otherwise, leave the box blank.
- Press the View Report or Download Data button.
- Press the Continue button when asked to confirm.

Notes:

- If you enter a Date Created, vehicles *added* on or after that date will be returned. If you enter a Date Updated, vehicles *updated* on or after that date will be returned. To return vehicles added *or* updated on or after a certain date, use a Date Created *and* a Date Updated.
- If you chose the View Report option, the information will display as a .PDF file in a browser window. Use your browser's Print mechanism if you wish to print the file.
- If you chose the Download Data option, the information will display in a browser window. Use your browser's Save As mechanism to save the file to your computer.

Download Employee Information

Steps:

- Select Download-> Employees from the drop-down menu.
- Select a Customer Name.
- Optionally, enter a Date Created.
- Optionally, enter a Date Updated.
- Optionally, check the Status box and select Locked or Unlocked.
- If you are going to download data (versus view a report) and you would like the data to contain column headers, check the Show Headers box. Otherwise, leave the box blank.
- Press the View Report or Download Data button.
- Press the Continue button when asked if to confirm.

Notes:

- If you enter a Date Created, employees *added* on or after that date will be returned. If you enter a Date Updated, employees *updated* on or after that date will be returned. To return employees added *or* updated on or after a certain date, use a Date Created Date *and* a Date Updated.
- If you chose the View Report option, the information will display as a .PDF file in a browser window. Use your browser's Print mechanism if you wish to print the file.
- If you chose the Download Data option, the information will display in a browser window. Use your browser's Save As mechanism to save the file to your computer.

Download Exception Information

Steps:

- Select any of the options from the Export menu.
- Click the Exceptions tab.
- Select a Customer or group of Customers.
- Optionally, enter a date range.
- Optionally, check the Search by Vehicle or Employee box. Then select a Vehicle or Employee Number.
- If you are going to download data (versus view a report) and you would like the data to contain column headers, check the Show Headers box. Otherwise, leave the box blank.
- Press the View Report or Download Data button.
- Press the Continue button when asked to confirm.

Notes:

- If you chose the View Report option, the information will display as a .PDF file in a browser window. Use your browser's Print mechanism if you wish to print the file.
- If you chose the Download Data option, the information will display in a browser window. Use your browser's Save As mechanism to save the file to your computer.

Items Only Client Services Can Change

If the following items need to be changed, send the information to Client Services:

Change in reports requested.
Change in report delivery (web, mail, or fax).
Receiving a report older than what is posted on the web interface.

Setting up departments.
Setting up sub departments.

Printing of cards.

Setting Volume Discount groups.
Setting Card-Sharing groups.
Setting Bill groups.

Changing tax information.

Setting Bill To Address for Customer Account vs. the physical address seen on the web.

Site Setup.