



MILLENNIUM WEXONLINE – Quick Step Document

State of Indiana Department of Transportation (INDOT) Guide

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 Driver Card

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

Step 2: Enter Driver 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 Driver 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" 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 Vehicles/Assets

Add Vehicle/Asset ID

Step 1: Shortcuts > Vehicles/Assets > Add Vehicle/Asset or click Add Vehicle/Asset from the Vehicles/Assets Tile on the Fleet Manager Account Summary page. The application will render the Add Vehicle/Assets page.

Step 2: Enter Vehicle/Asset 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 Vehicle.

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

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

View Vehicle/Asset ID

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

Step 2: To search for a particular Vehicle/Asset, 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 Vehicles in a .csv or .xls format.

Step 3: To view the details for a particular Vehicle, you may click on the hyperlinked Vehicle Number. The application will render the Vehicle Detail page.

Edit Vehicle/Asset

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

Step 2: View the Vehicle 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 Vehicles to return to the list view of the Vehicles associated to the account in focus, or click Back to Account to return to the Account Summary page.

Clone Vehicle/Asset

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

Step 2: View the Vehicle 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 Vehicle. Once you click Add, the application will render a confirmation page.

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

Change Vehicle Status

This function allows you to terminate an active Vehicle/Asset or activate a previously terminated Vehicle/Asset.

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

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

Terminate (Inactivate) Vehicle/Asset

Step 1: From the list view of Vehicles associated to the account in focus, click Terminate beside the desired Vehicle. The application will render the Change Vehicle 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 Vehicles/Assets to navigate to a list view of all the Vehicles/Assets 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. ******