WEX*Online*® AUTHORIZATION CONTROLS & PURCHASE ALERTS

The following pages provide step-by-step instructions for assigning Authorization Controls and setting up Purchase Alerts on the Wright Express fuel card.

Authorization Controls help you set rules for how much your drivers buy, how often and when. If a transaction exceeds any of your limits, the Wright Express system is designed to decline the transaction, subject to the limitations described in **PROFILE MANAGER**. Before completing the account set up for either **Authorization Controls** or **Purchase Alerts** you should read the terms of use located in WEX***Online*** ® carefully for important information about the limitations of each product.

Purchase Alerts provide managers with an email notification when a card has violated one of the purchase guidelines you set on your account. When you receive an alert email, log in, review the details and decide what action to take. **Purchase Alerts** may be identical for all cards, or may be varied for each vehicle or group of vehicles depending on fuel tank capacity, type of use, etc. It is important to recognize that **Authorization Controls** and **Purchase Alerts** are two different processes to assist you with your fuel purchase management.

Using unlimited or unreasonably high authorization limits may impact the effectiveness of either product. If you need help determining appropriate limits, contact Fleet Support Services at (404-656-6295 or e-mail GAFleet@doas.ga.gov.

For help using WEX***Online*** you can call Wright Express Priority Queue at 1-800-726-0492.

Section 1. ASSIGN CONTROLS USING A CUSTOM PROFILE YOU DEFINE.

NOTE: Profiles and controls are best managed at the account level. Always make sure you choose an account or department before you hit select.

After you log on to **WEX*Online***, select **CONTROLS** > **PROFILE MANAGER** on the tool bar.

If you only manage one account, only that account will be displayed. If you have authorization to manage more than one account, you will need to select from the search list. Verify you have the right account under Fleet Account then hit "Select."

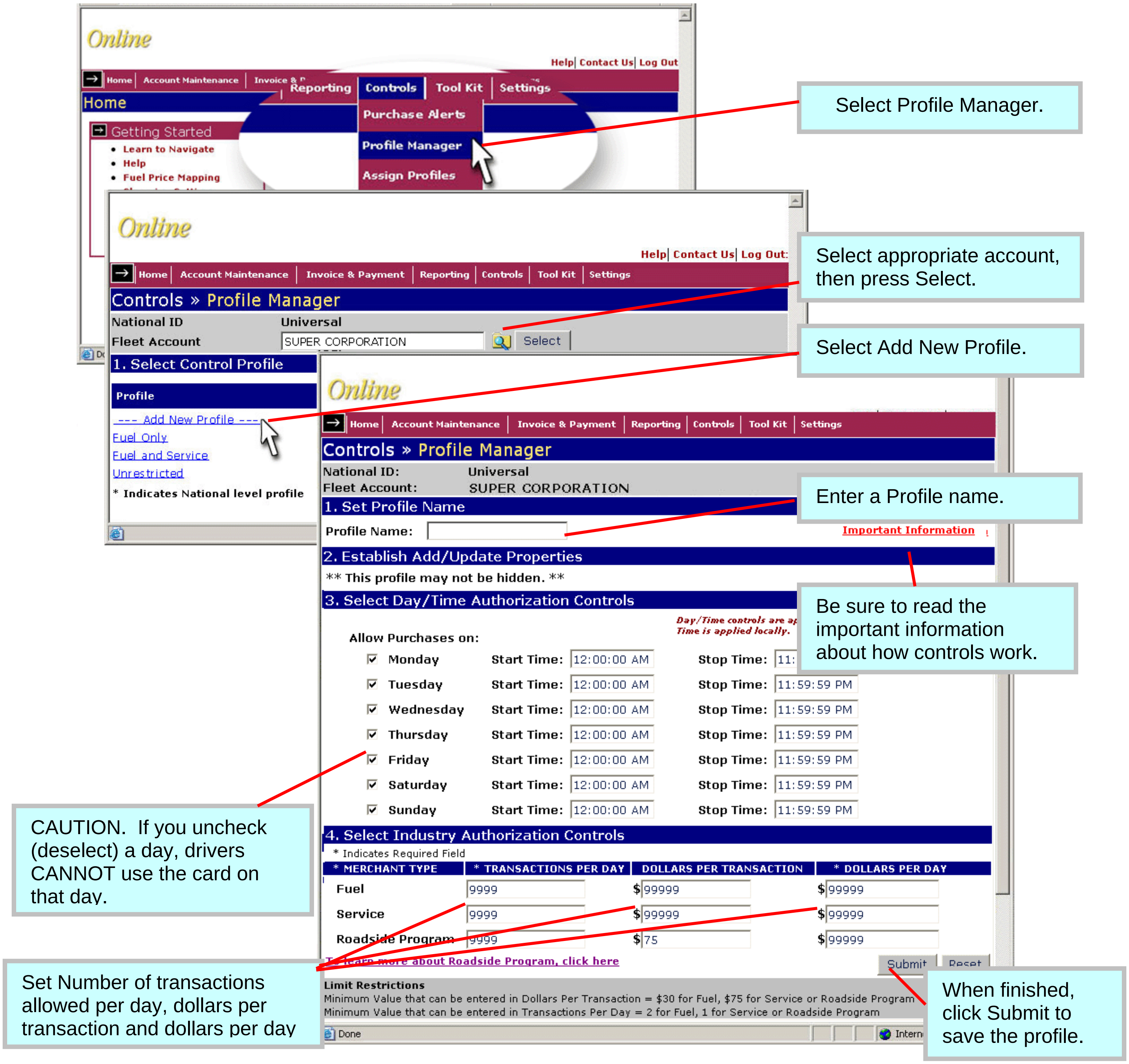
Under **1, Select Control Profile, choose "---Add New Profile---"**

Assign a name to the Profile that will fit all the vehicles to be assigned under this profile. For example, if you want a profile for Diesel vehicles, then you may want to call it Diesel.

In **3. Day/Time Authorization Controls**. By having a check next to the day of week, these are the days and times allowed to fuel. If you deselect a day the cards will not be able to be used on those days.

In **4. Industry Authorization Controls**. This is where you assign the number of authorized transactions per day, the total dollar amount per transaction and total dollar amount per day.

Once you've set all the fields and verify they are accurate, click on **Submit**. This will assign those values you have chosen and update the profile accordingly. You can update these values at any time, and once cards are assigned to the profile those updated values will be carried over to the cards in near real-time. (Updates scheduled to occur every 15 minutes.)

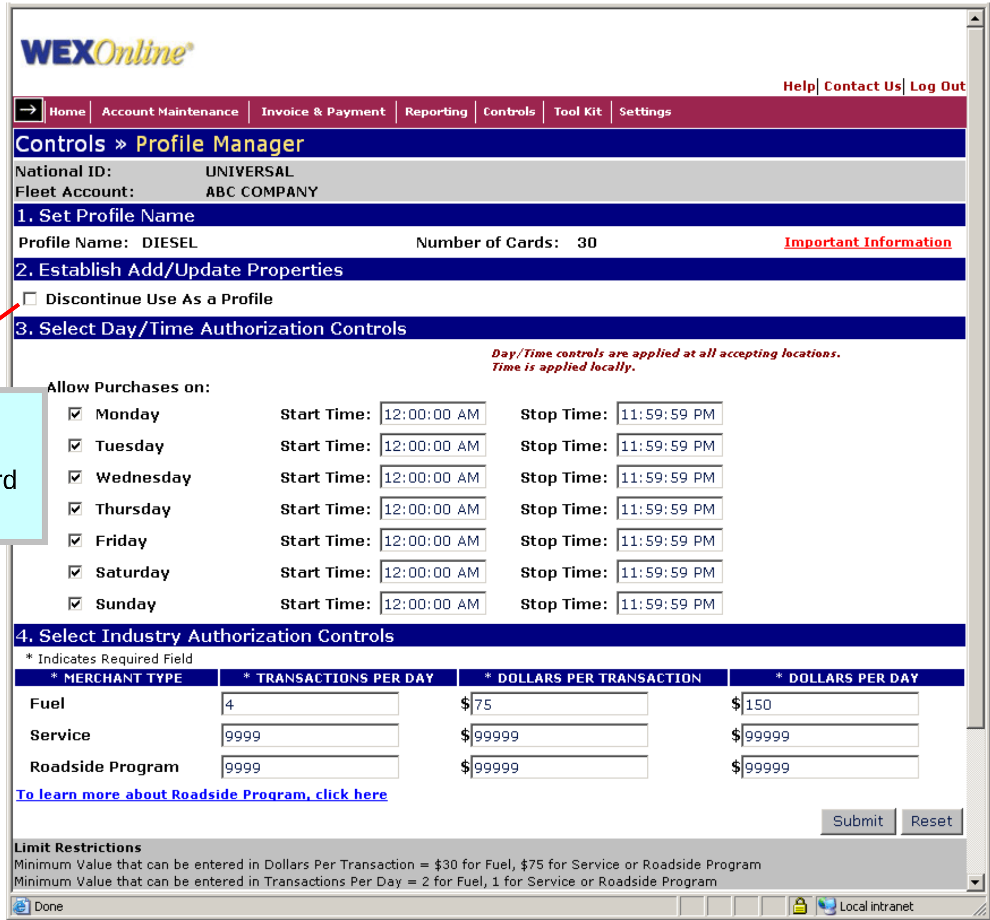


Select Profile Manager.
Select appropriate account, then press Select.
Select Add New Profile.
Enter a Profile name.
Be sure to read the important information about how controls work.
CAUTION. If you uncheck (deselect) a day, drivers CANNOT use the card on that day.
Set Number of transactions allowed per day, dollars per transaction and dollars per day
When finished, click Submit to save the profile.
Online
Help | Contact Us | Log Out
Home | Account Maintenance | Invoice & Payment | Reporting | Controls | Tool Kit | Settings
Purchase Alerts
Profile Manager
Assign Profiles
Getting Started
Learn to Navigate
Help
Fuel Price Mapping
Controls » Profile Manager
National ID Universal
Fleet Account SUPER CORPORATION
Select
1. Select Control Profile
Profile
--- Add New Profile ---
Fuel Only
Fuel and Service
Unrestricted
* Indicates National level profile
1. Set Profile Name
Profile Name:
Important Information
2. Establish Add/Update Properties
** This profile may not be hidden. **
3. Select Day/Time Authorization Controls
Allow Purchases on:
Monday Start Time: 12:00:00 AM Stop Time:
Tuesday Start Time: 12:00:00 AM Stop Time: 11:59:59 PM
Wednesday Start Time: 12:00:00 AM Stop Time: 11:59:59 PM
Thursday Start Time: 12:00:00 AM Stop Time: 11:59:59 PM
Friday Start Time: 12:00:00 AM Stop Time: 11:59:59 PM
Saturday Start Time: 12:00:00 AM Stop Time: 11:59:59 PM
Sunday Start Time: 12:00:00 AM Stop Time: 11:59:59 PM
4. Select Industry Authorization Controls
* Indicates Required Field
* MERCHANT TYPE | * TRANSACTIONS PER DAY | DOLLARS PER TRANSACTION | * DOLLARS PER DAY
Fuel 9999 $99999 $99999
Service 9999 $99999 $99999
Roadside Program 9999 $75 $99999
To learn more about Roadside Program, click here
Submit Reset
Limit Restrictions
Minimum Value that can be entered in Dollars Per Transaction = $30 for Fuel, $75 for Service or Roadside Program
Minimum Value that can be entered in Transactions Per Day = 2 for Fuel, 1 for Service or Roadside Program
Done

EDITING AN EXISTING PROFLE

You can change the settings of a profile and the new settings will automatically apply to any card assigned to that profile. If you want to discontinue using a profile, select **Discontinue Use As a Profile**. This will not impact cards currently assigned to the profile.

Note: No Profile is active until you assign cards to it! The steps of assigning a Profile to cards are outlined below in **ASSIGN PROFILE** to cards.



To discontinue using a profile, click here. This will not change any card assigned to the profile.

Section 2. ASSIGN A PROFILE TO CARDS.

Go to **CONTROLS** on the tool bar, **ASSIGN PROFILES**.
Choose the appropriate account under the Fleet Account.

Under 1, Search for Card, you can choose to search for cards if they are either Fuel Only or Unrestricted, depending on your account type. Or you can narrow the search down to a specific card number, range of cards or the Company ID which in many cases may be your own Vehicle number. Once you have chosen the criteria, click "Search." NOTE: If you want to see all the cards on the account, then leave all the criteria entries blank and hit "Search."

Under **2, Choose Control Profile**, you can assign the profile to either an individual card, group of cards, or all cards on the account and the profile you want to assign to them. So if you choose to search for only one card, only that card will show, and the same for a group of cards.

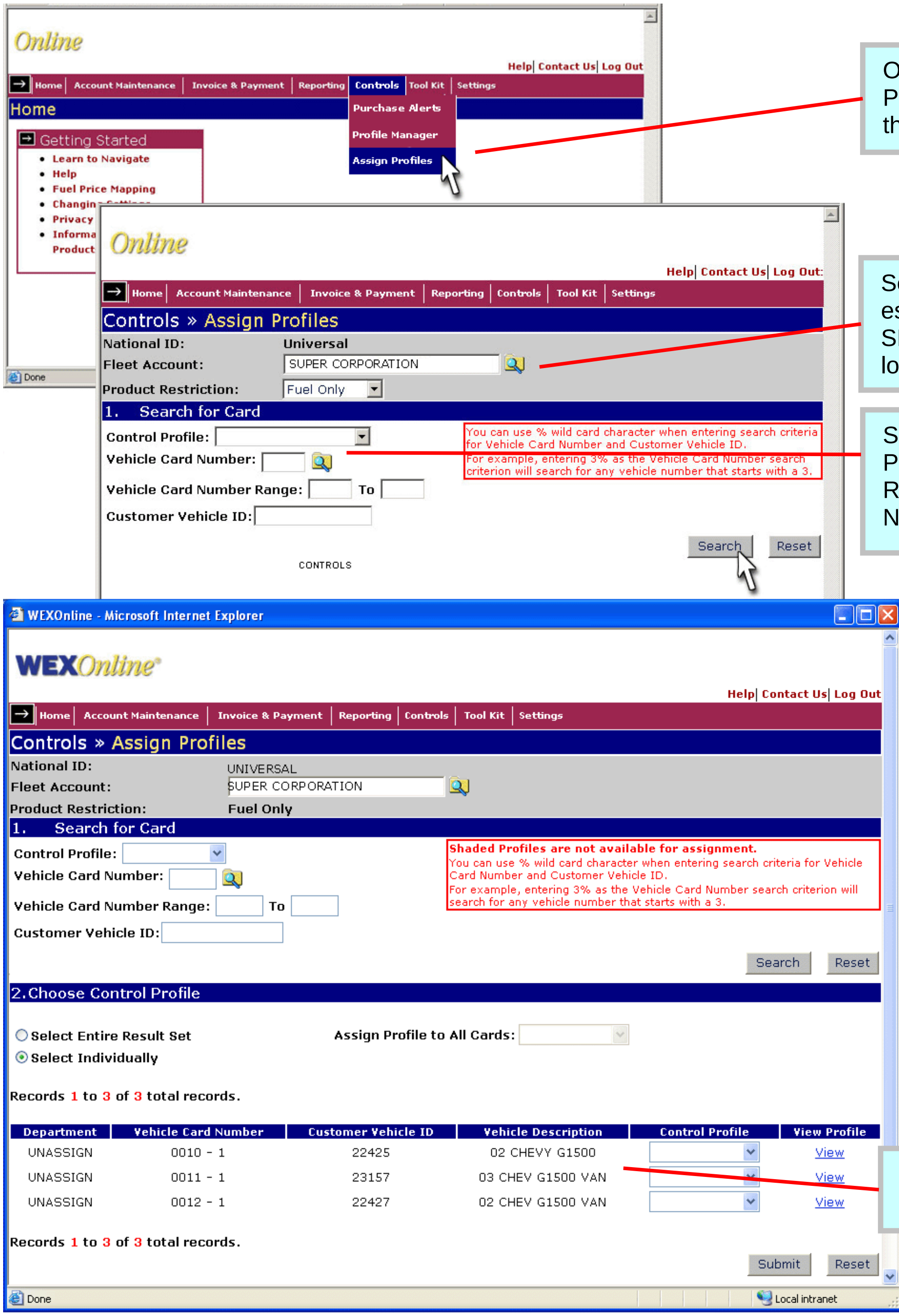
From here you will choose whether to assign a profile to all the cards that your search pulled, or to assign the profiles one card at a time.

STEPS:

To assign all cards a profile at one time, click on the toggle "**Select Entire Result Set**" then under "**Assign Profile to All Cards**" choose the profile that you would like this group of cards to be assigned to. Once that has been defined, click "**Submit**."

To assign the cards individually, click on the toggle "**Select Individually**" and then under the list of cards, you will need to select under **Control Profile**, the drop-down menu, the profile to assign each card to. When you finish assigning profiles, click the **Submit** button at the bottom of the screen. You will receive a confirmation screen.

If you want to see the settings for a listed profile, you may click on the blue hyperlink "**View**" to the far right of the card and profile information for a specific card. This displays the details of the profile attached to the card.

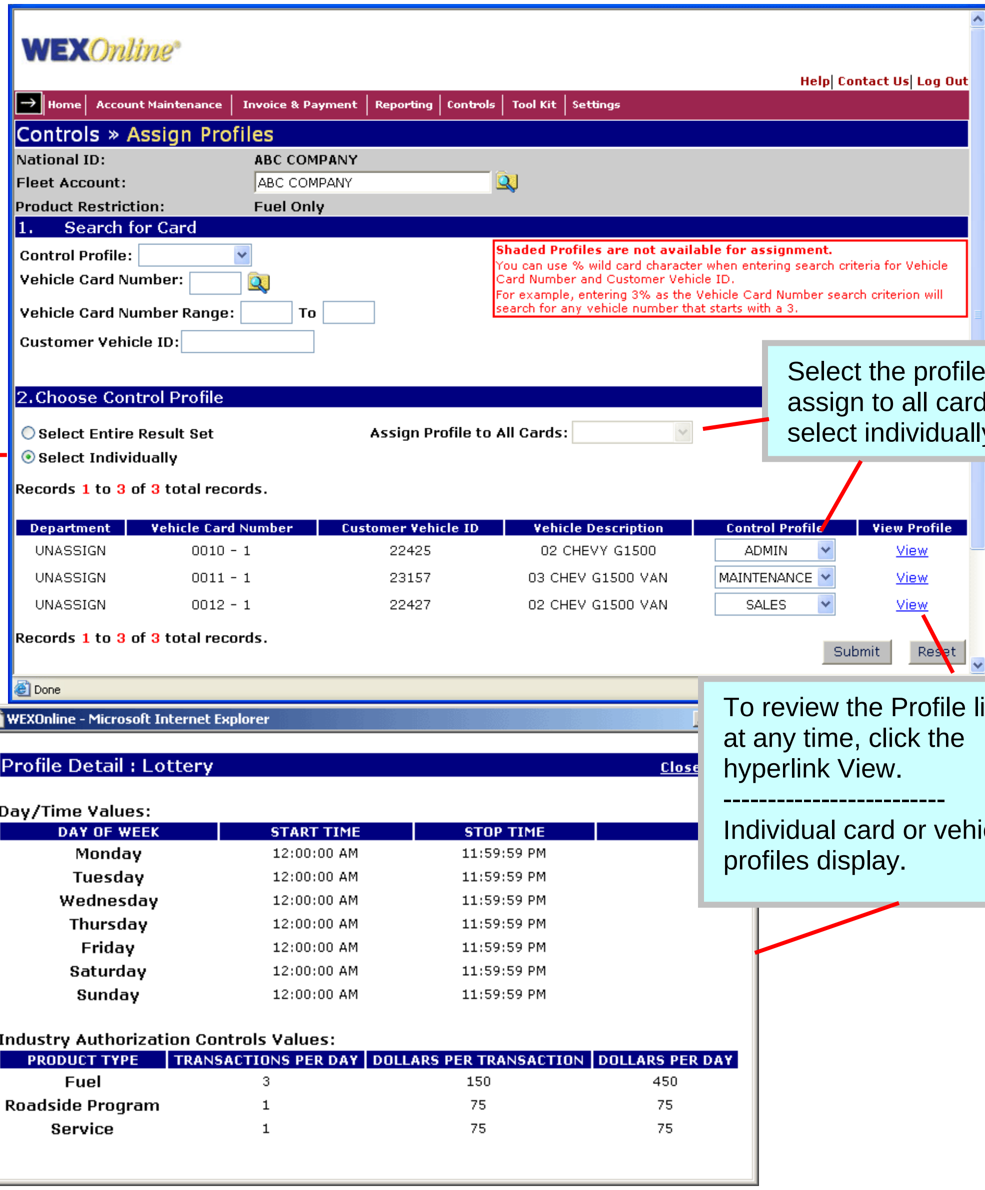


On **WEX***Online* Home Page, Select Controls, then Assign Profile.

Select the account for establishing a profile. Use SEARCH if necessary to locate an account.

Search for cards by Profile, Vehicle Number, Range of Vehicle Numbers, or Vehicle ID.

Search results appear here.



Select whether you want to assign the profile to the entire set or individually.

Select the profile to assign to all cards or select individually.

To review the Profile limits at any time, click the hyperlink View.

Individual card or vehicle profiles display.

Section 4. ESTABLISHING PURCHASE ALERTS.

To set up or check purchase alerts, from the WEX Online Home Page, select **PURCHASE ALERTS** from the **CONTROLS** drop down menu.

Select the account for which you wish to receive purchase alerts. If you only manage one account, it will be displayed, or you can search from a list of accounts that you manage to set the **Purchase Alerts** for that account. If you wish you can search for a specific vehicle card number in that account to set Purchase Alerts on that specific card. When finished, click on the **Select** button.

The **Purchase Alerts** criteria screen will display allowing you to select those items and the criteria which will generate an e-mail alert. For example, you may select the number of transactions, out-of-state purchase, time-of-day, day of week, dollars per transaction or day, and grade of fuel. Keep in mind that **Purchase Alerts** and **Authorization Controls** are different. You may decide to receive **Purchase Alerts** at levels lower than the authorization limit placed on a card or account. You may also decide to only be notified when certain events occur rather than all of the criteria available.

For example, on the screens that follow, you would be notified of any purchase made outside of your state, any purchase on Saturday or Sunday, and any purchase of fuel other than regular unleaded gasoline.

After selecting the criteria, click on **Submit** to save the alert notifications. Note that alert notifications can be for an entire account or can be set differently for specific vehicles. The easiest way to set them is to place an alert profile on the entire account and then go back and change individual vehicles as necessary.

To make sure you receive your email notifications, check to make sure your email address is up to date. From the **Settings** dropdown on the Home Page, select **Preferences**. From the Preferences Screen that appears, enter the e-mail address to receive the notifications and Click **Yes** for Receiving E-mail Notification of Purchase Alerts. Click **Submit** to save the preferences selected.

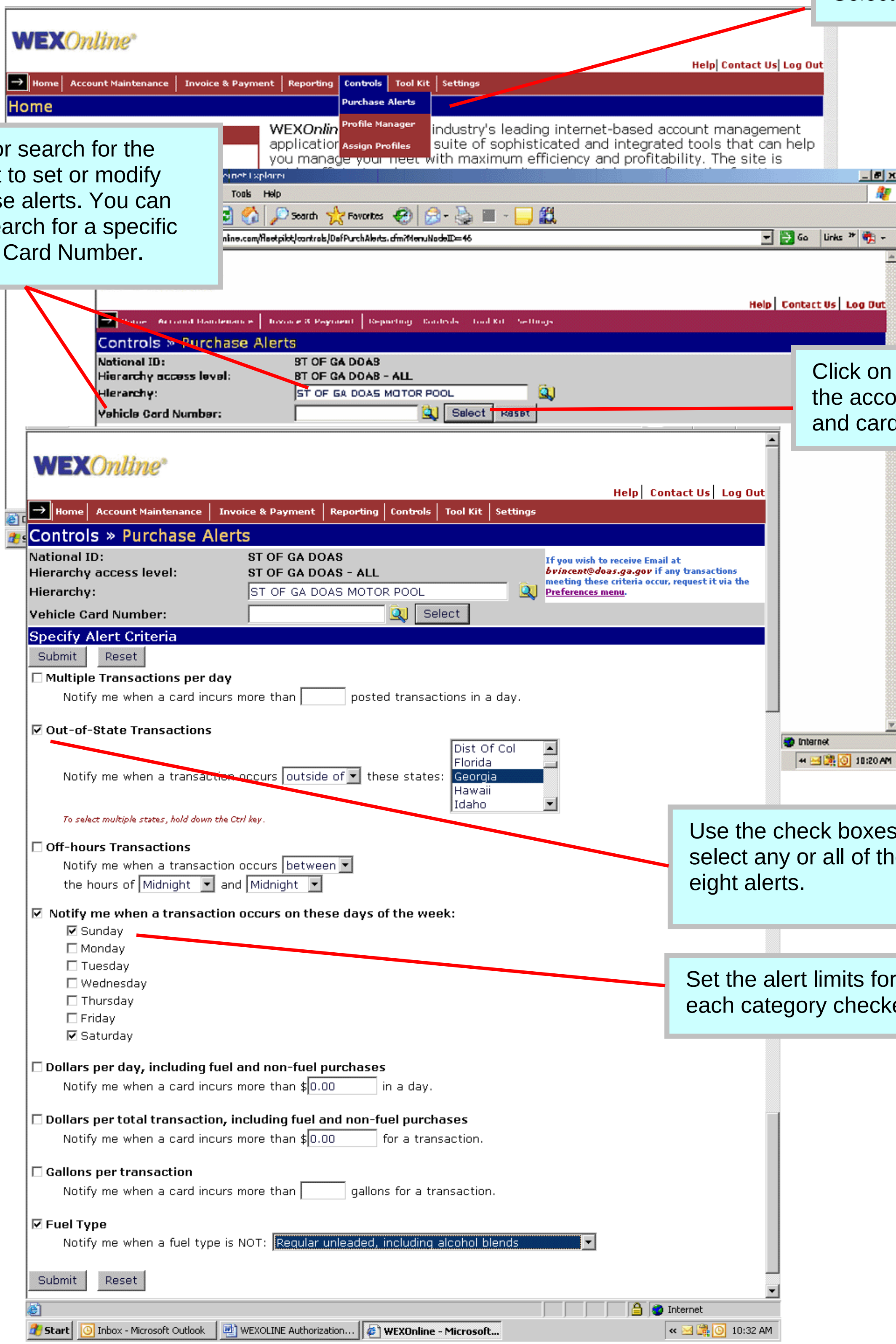
From the WEX Home Page, Select Purchase Alerts.

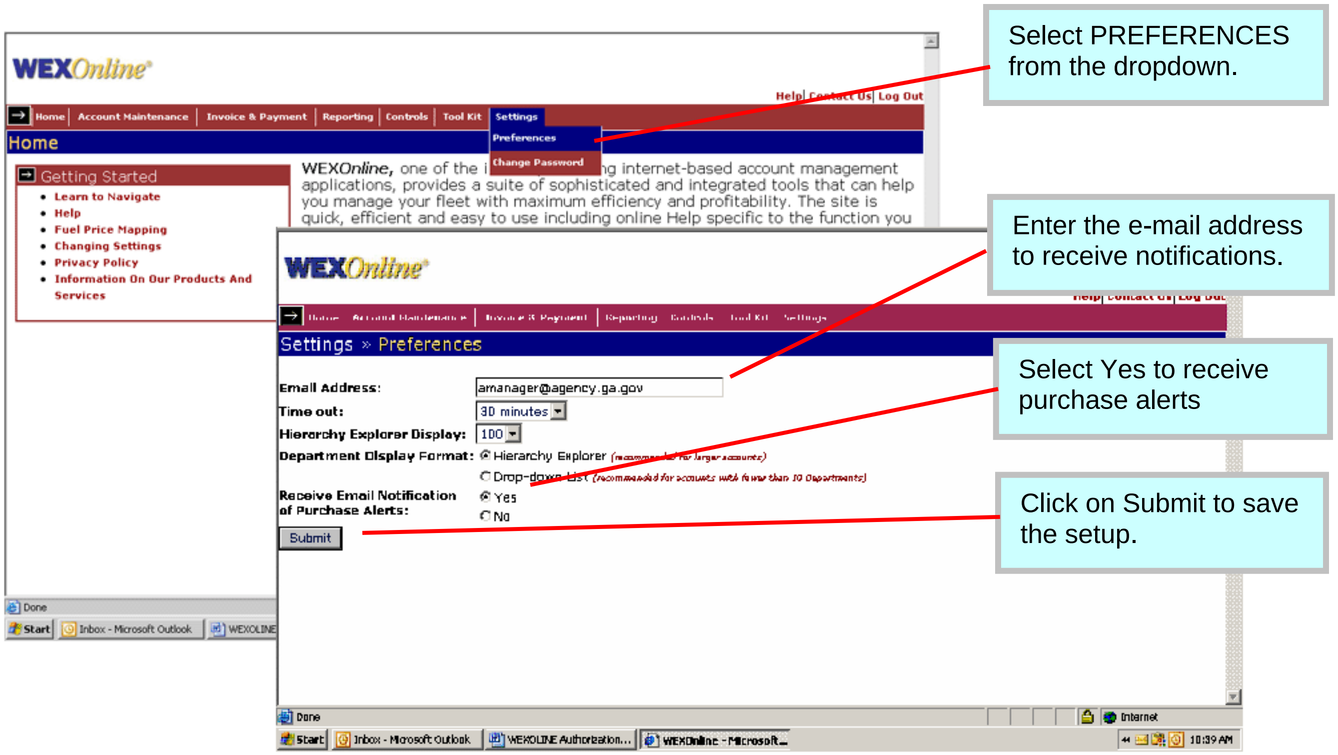
Select or search for the account to set or modify purchase alerts. You can even search for a specific Vehicle Card Number.

Click on Select when the account or account and card is displayed.

Use the check boxes to select any or all of the eight alerts.

Set the alert limits for each category checked.




Select PREFERENCES from the dropdown.
Enter the e-mail address to receive notifications.
Select Yes to receive purchase alerts
Click on Submit to save the setup.
WEXOnline
Home | Account Maintenance | Invoice & Payment | Reporting | Controls | Tool Kit | Settings
Preferences
Change Password
Home
Getting Started
Learn to Navigate
Help
Fuel Price Mapping
Changing Settings
Privacy Policy
Information On Our Products And Services
Settings » Preferences
Email Address:
amanager@agency.ga.gov
Time out:
30 minutes
Hierarchy Explorer Display:
100
Department Display Format:
Hierarchy Explorer
Drop-down List (recommended for accounts with fewer than 10 Departments)
Receive Email Notification of Purchase Alerts:
Yes
No
Submit