EV En Route Fleet Manager Onboarding

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1. Overview

1.1. Introduction

This document describes how a fleet manager can add en route EV-charging capabilities to their account and enable EV en route charging for individual drivers.

1.2. Managed Accounts

Sections of this onboarding can be completed on the Fleet Manager's behalf by a dedicated WEX account manager. Please consult with them directly to learn more.

1.3. About Electric Vehicle (EV) Charging

En route electric vehicle charging happens on roadsides, at retail locations, at designated charging facilities, and more.

It takes approximately 30 minutes to recharge a vehicle depending on the make and model. En route chargers also require drivers to verify their identity via a unique RFID and/or mobile app in order to charge.

In this guide, Fleet Managers will find all the information required to start charging electric fleet vehicles with EV-enabled WEX fleet cards.

1.4. Finding Chargers in the WEX Network

Drivers can charge vehicles en route at **ChargePoint** and **Flo** charging stations. These stations can be located using the DriverDash or WEX Connect apps.

Please visit the correct CPO (Charge Point Operator) by their logo:
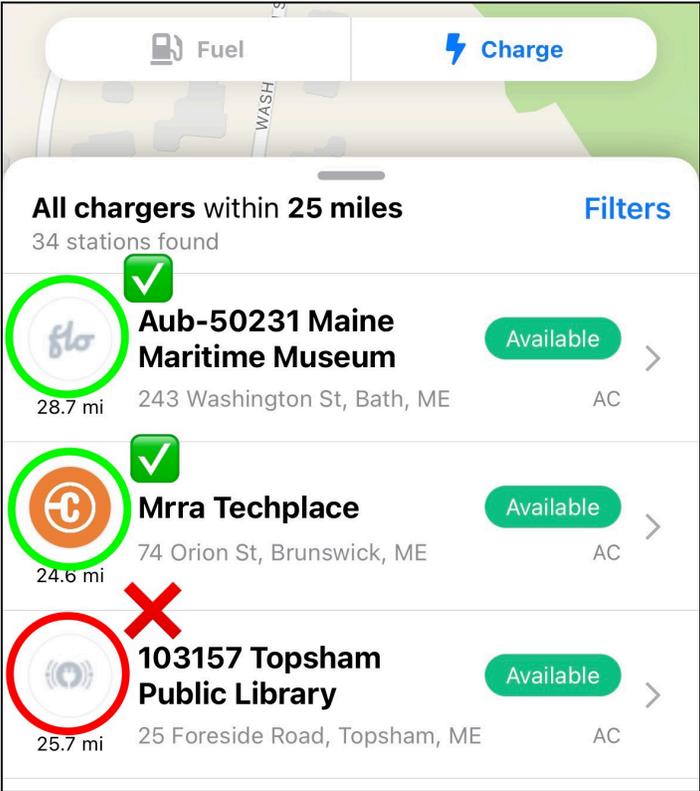
2. Onboarding Drivers

2.1. Equipping Drivers with EV-Enabled Cards

After EV has been enabled at the account level, the Fleet Manager must either enable existing fleet cards for EV charging, or order new EV-enabled cards.

2.2. Enabling Existing Cards for EV Charging

Enable existing cards for drivers who already have a fleet card and need EV-charging capabilities.

When card enablement is complete, WEX may send one RFID per newly EV-enabled fleet card to Fleet Managers to distribute where applicable.

1. Log into WEX Online
2. Click the "Cards" tab in the navigation pane on the left
3. Click "View cards"
4. Locate the first card which must be enabled for EV charging
    a. Use the "Advanced Search Filter" dropdown for faster searching
5. Select the correct card, then click "Select" under "Actions"
6. Click "Enable EV"
7. Enter driver phone number, vehicle VIN, and driver email (if applicable)
    a. Fields marked with an "*" are required
8. Click "Save"
9. Repeat the process to enable more cards as needed

2.3. Ordering New, EV-enabled Cards

Order new cards for drivers previously unequipped with fleet cards.

When a card order is submitted, WEX will also send one RFID per new EV-enabled fleet card for Fleet Managers to distribute.

1. Log into WEX Online
2. Select "Cards" from the left navigation pane
3. Select "Add _____* card"
    a. * This term may vary by account type
4. If the driver should have DriverDash access, click to toggle "DriverDash Access" button on (blue). This will trigger an email prompting the driver to download DriverDash and set up their account via a link that will expire after 24 hours. This

action can also be performed later by following the steps under section: [3.2. Inviting Drivers to Use and Download DriverDash](#)

5. Click to toggle "EV Enabled" button on (blue)
6. Enter information
   a. Fields marked with an "*" are required
7. Click "Save"
8. To add another driver, click "Add Another" and repeat steps 4–7
9. Click "Complete Order"
10. Click the dropdown to select the preferred shipping option
11. Click to select preferred address type
    a. If "One time use" is selected, enter required address information as noted with "*"
12. Confirm that "Contact" and "Address" information are correct
13. Click "Finish"

2.4. Distributing RFIDs to Drivers

After Fleet Managers have ordered RFIDs for existing EV-enabled fleet cards and/or new cards plus corresponding RFIDs, WEX will ship these to the Fleet Manager.

2.5. Authorizing More Than 3 Daily Charges

2.5.1. How to Change the Transactions Per Day Limit in WEX Online

Authorization profiles allow Fleet Managers to limit driver fleet card transactions to a reasonable limit on number of daily transactions, maximum daily spend, and more.

In WEX Online, the default limit on daily transactions is 3. Some Fleet Managers may prefer to allow additional daily charging sessions as drivers acclimate to charging an electric vehicle.

1. Log into WEX Online
2. Click "Cards"
3. Click "Add Authorization Profile"
4. No changes are required to change the Transactions Per Day Limit on page 1, "Get Started"
   a. Make any desired changes
5. Click "Next"
6. No changes are required to change the Transactions Per Day Limit on page 2, "Per Transaction"
   a. Make any desired changes
7. Click "Next"

a. If drivers should have no limit on transactions per day, click the "No" button across from "Would you like to limit purchases daily?"
8. To limit Transactions Per Day, enter the desired limit under "Transactions Per Day, Set Limit"
9. Click "Next"
10. No changes are required to change the Transactions Per Day Limit on page 4, "Weekly Schedule"
    a. Make any desired changes
11. Click "Next"
12. Set a Authorization Profile Name that is easy to remember, such as "EV # daily transactions"
13. Click "Finish"
14. New Authorization profiles must be assigned to drivers

2.5.2. Changing Driver Authorization Profiles

1. Click "View Cards" in the banner
    a. If no banner appears, click "Cards" then "View cards"
2. Locate the first driver whose authorization profile needs to be changed
    a. Use the "Advanced Search Filter" dropdown for faster searching
3. Under "Actions" click "Select" on the corresponding line of any selected driver
    a. Driver status must be "Yes" in the "EV Enabled" column
4. Click "Change Auth Profile"
5. Select the new authorization profile from the "Available Profiles" dropdown
6. Click "Apply"
7. Repeat steps 1–6 as needed

3. The DriverDash App – As Applicable

3.1. About DriverDash

Fleets have the **option** to equip drivers with the DriverDash application if drivers use mobile devices (iPhone, Android, etc) for business use. DriverDash can be used in addition to or instead of RFIDs to start and/or stop charging sessions remotely from their device.

DriverDash is available both on the Apple Store and Google Play.

If the fleet is not currently using DriverDash, please reach out to your dedicated WEX contact or contact WEXEVFleet@wexinc.com to learn more.

3.2. Inviting Drivers to Use and Download DriverDash

To use DriverDash, Fleet Managers must use WEX Online to invite drivers to download the app and set up an account.

1. Log into WEX Online
2. Make sure that all new drivers have been added before starting
3. Click "Cards" in the navigation pane on the left
4. Click "View cards"
5. Locate the first driver who needs to be enabled for EV charging
   a. Use the "Advanced Search Filter" dropdown for faster searching
6. Once the correct card has been located, click "Select" under "Actions"
7. Click "Add DriverDash Access"
8. Fill in the driver email address and phone number
   a. Fields marked with an "*" are required
9. Click "Submit"
10. Repeat the process to enable as many cards as are needed
    a. The link sent to drivers via email will only be active for 24 hours. If the link expires, the Fleet Manager will need to send the link again.

3.3. Resending the DriverDash Invite to Drivers

1. Log into WEX Online
2. Click "Cards" in the navigation pane on the left
3. Click "View cards"
4. Drivers who have not yet created an account will be noted as "Pending" in the DriverDash Access column
   a. Use the "Advanced Search Filter" dropdown for faster searching
5. Once the correct driver has been located, click "Select" under "Actions"
6. Click "Resend DriverDash Link"
7. Repeat as needed

3.4. Starting a Charging Session with DriverDash

1. Open the DriverDash app and log in
2. Tap "Activate station"
3. Tap to choose a charging station
4. Input vehicle odometer reading
5. Input vehicle ID
6. When prompted in the app, plug the connector into the vehicle to start charging. The DriverDash screen will change when the vehicle is charging successfully
7. Allow the vehicle to charge as needed

      a. The DriverDash app may be closed while a vehicle is charging without causing any interruptions to charging. Reopen the app and tap "Vehicle is charging…" to return to the charging screen

8. When ready to disconnect, tap "Finish charging" in the DriverDash app, or disconnect the charger and return it to the charging station dock
      a. Charger will continue to be active until the connector has been disconnected from the vehicle
9. After each charging session is complete, the driver will receive a digital receipt. This receipt will be stored in the DriverDash app. The Fleet Manager will be able to review these receipts in WEX Online within a few minutes of charging session completion

3.5. Removing Driver Access to DriverDash

1. Log into WEX Online
2. Click "Cards" in the navigation pane on the left
3. Click "View cards"
4. Drivers who have not yet created an account will be noted as "Pending" in the DriverDash Access column
      a. Use the "Advanced Search Filter" dropdown for faster searching
5. Once the correct driver has been located, click "Select" under "Actions"
6. Click "Remove DriverDash Access"
7. Repeat as needed