Manage Your Fleet

Introduction

This guide is for business owners who own and run a fleet of Electric Vehicles (EVs) and may also own one or more ChargePoint charging stations. This guide provides information about setting up your fleet of vehicles and configuring depot stations to serve the needs of your fleet.

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Fleet Overview

ChargePoint provides tools for fleet managers to activate ChargePoint cards for vehicles and to group vehicles in to fleets. Coupled with ChargePoint smart charging stations, the fleet functionality allows you to track energy use by vehicle and by fleet. A fleet is a group of vehicles sharing the same information that is configured for the fleet, such as pricing, access control, funding, and telematics integration. Each individual vehicle in the fleet is associated with a vehicle identifier and a unique ChargePoint RFID Card serial number. Using the fleet features allow you to:

- Save capital expense through power sharing
- Save operational expense through scheduled charging and other energy management features
- Restrict use to fleet vehicles, preventing others from charging (for example, the general public)
- Perform capacity planning and other analytics
- Use a fuel card to allow your vehicles to charge at stations that require payment

Set Up Your Fleet

ChargePoint recommends you set up your fleet first, then set up your vehicles. This includes:

- Create the fleet
- Add contacts for the fleet
- Set up notifications for the contacts
- Add a funding source

Create a Fleet

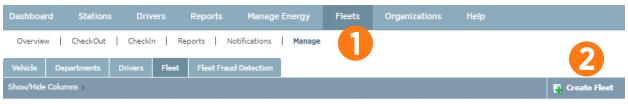
A fleet in ChargePoint is a collection of vehicles. Many customers create a single fleet and add their vehicles to that fleet. Some customers find it convenient to create multiple fleets. Each fleet can have:

- Different funding sources
- Different pricing on stations
- Separate contacts
- Separate reports

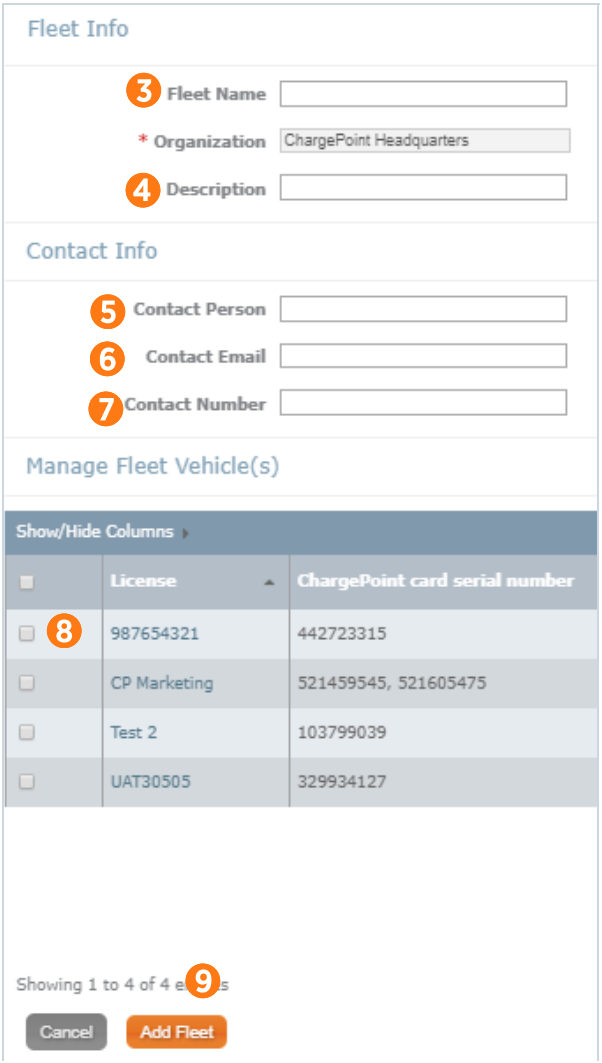
You must create at least one fleet to use the ChargePoint fleet functions.

If the vehicles were already created in ChargePoint, you can add them to the fleet during this process; otherwise, you can create and add them later. For details, see Add Vehicles to Your Fleet.

1. Log into ChargePoint and click **Fleets > Manage > Fleet**.
2. Click **Create Fleet**.



3. Enter a **Fleet Name** for your new fleet.
4. *Optional*. Enter a **Description** for the fleet.
5. *Optional*. Enter a **Contact Person** to reach for issues or questions regarding this fleet.
6. *Optional*. Enter a **Contact Email** address for issues or questions regarding this fleet.
7. *Optional*. Enter a **Contact Number** to call for issues or questions regarding this fleet.
8. *Optional* Previously added vehicles may appear. Select the vehicles you want to associate with this fleet by selecting their checkboxes.
9. When done, click **Add Fleet**.

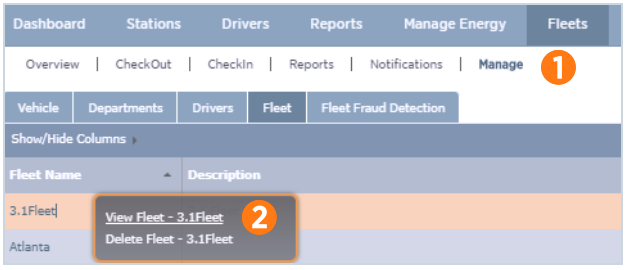


Set Up a Payment Method for Your Fleet

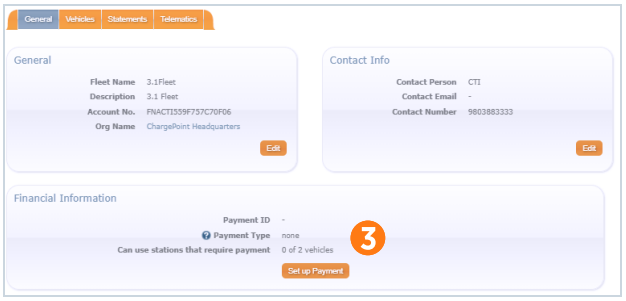
By default, fleet vehicles can charge only at free stations. Typically, this includes the stations you own, but most likely does not include public stations.

To ensure your fleet vehicles can charge at stations that require payment, set up a payment method that can be used fleet-wide.

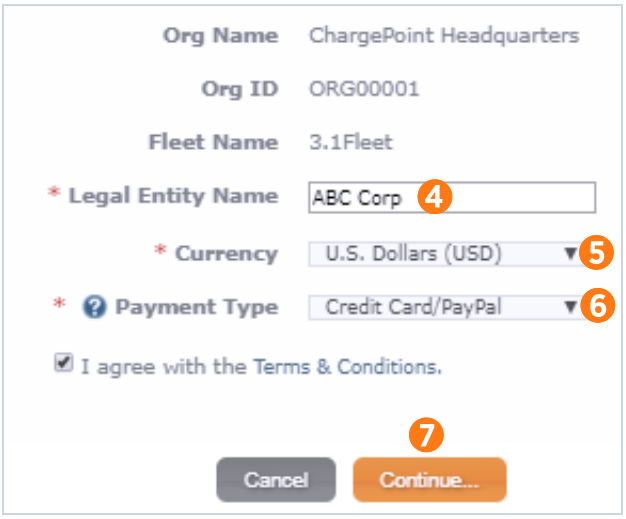
1. Log into ChargePoint and click **Fleets > Manage > Fleet**.
2. Click anywhere on the row you want to set up and then click **View Fleet**.



3. In the Financial Information box, click **Set up Payment**.



4. Enter your company's name in the **Legal Entity Name** field.
5. Select your preferred **Currency**.
6. Select the Payment Type from the following options:



- **ChargePoint Fuel Card Service**. When you select this source for payment, a Set Up Payment form opens. Enter the information requested, such as your estimated annual charging fees and the contact information for Accounts Payable. ChargePoint sends you a quote requesting a PO against which you will be invoiced each month for the fees incurred by your fleet vehicles as they charged at stations that require payment.
- **Credit Card / PayPal**. A standard credit card or PayPal account. When you select this source for payment, select the **I agree with the Terms & Conditions** checkbox. After you click **Continue**, follow the on-screen instructions to enter your payment information. Once the payment method is set up, it is available for use immediately by your fleet vehicles.
- **Voyager Fuel Card**. For this source of payment, you need to specify the Voyager account number and expiration date for each vehicle. For details, see the "Standard Fuel Cards" section.
- **WEX Fuel Card**. For this source of payment, you need to specify the WEX account number and expiration date for each vehicle. For details, see the "Standard Fuel Cards" section.

Note: If you select WEX Fuel Card, you will also have the option to opt-into reporting through WEX on free sessions, for a fee. For additional information on reporting fees, see the "Standard Fuel Cards" section.

7. Click **Continue**.

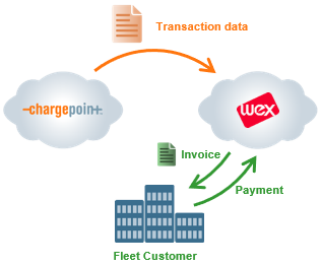
Standard Fuel Cards

Many fleets use standard fuel cards such as Voyager and WEX to pay for fuel. ChargePoint integrates with these standard fuel cards to allow those fleets to pay for electricity as a fuel as well. Voyager and WEX are available in the USA only.

Voyager and WEX cards do not have RFID chips in them and cannot be read directly at charging stations. Instead, the driver uses a ChargePoint RFID card at the station. The fleet manager specifies which fuel card provides the funding source for each vehicle.

Fuel Card and ChargePoint Integration

Here is an illustration of the overall process and how the solution fits together:

1. The fleet manager logs into ChargePoint and maps: • The ChargePoint RFID card • The vehicle • The WEX or Voyager card	
2. The driver uses a ChargePoint RFID card at the station • The station reports usage to the ChargePoint cloud • Based on the mapping, ChargePoint knows which fuel card to bill for each ChargePoint RFID card	
3. Transaction Processing: • ChargePoint sends transactions to Voyager or WEX for all *paid* sessions that are funded by their fuel cards (and, optionally, for *free* sessions on WEX cards) • The fleet is billed by Voyager or WEX for the transactions (and a reporting fee for the *free* sessions, if customers opt in)	

Fuel Card Reporting Fees

For paid sessions (involving a non-zero fee to charge the vehicle), the fleet is billed the fuel cost by the fuel card provider. There is no additional reporting fee for these transactions.

Data for all sessions, free and paid, is available to the fleet manager through their ChargePoint login. In some cases, data for free sessions may also be available through the fuel card provider.

- Voyager: Free session reporting is not currently available through Voyager

- WEX: Free session reporting is available through WEX for a $0.25 per session fee*, charged by WEX. Fleet managers can opt-in to this reporting service when you set up your fleet payment method in ChargePoint.

* Each free session appears on your WEX report as two line items:

- $0.01 for fuel (NACS Prod Code 308)
- $0.24 for reporting services (NACS Prod Code 957)

Note: WEX (not ChargePoint) charges a fee for this reporting service. WEX fees may change; see the Terms and Conditions when opting for reporting via WEX.

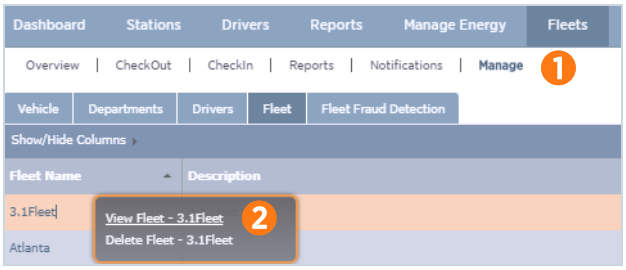
Fuel Card Restrictions

Vehicles funded by WEX Cards or Voyager Cards:

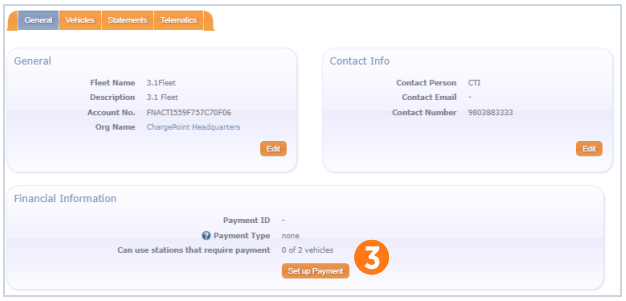
- Are available to fleets in the US only.
- Cannot charge at stations requiring payment outside the US.
- Cannot charge at stations outside the ChargePoint Network (such as roaming stations).

Set up Standard Fuel Card Funding

1. Log into ChargePoint and click **Fleets > Manage > Fleet**.
2. Click anywhere on the row you want to set up and then click **View Fleet**.

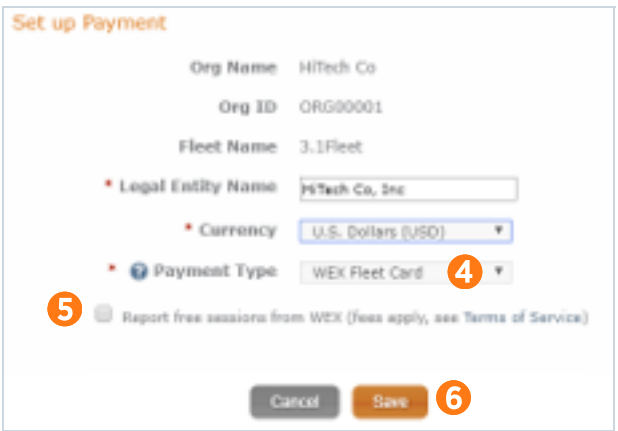


3. In the Financial Information box, click **Set up Payment**.



4. From the **Payment Type** dropdown, select **WEX Fuel Card** or **Voyager Fuel Card**.
5. *Optional*. Select the **Report free sessions from WEX** checkbox to include no-fee sessions.

   Note: Fees apply, so see the Terms of Service before selecting this item.
6. Click **Save**.

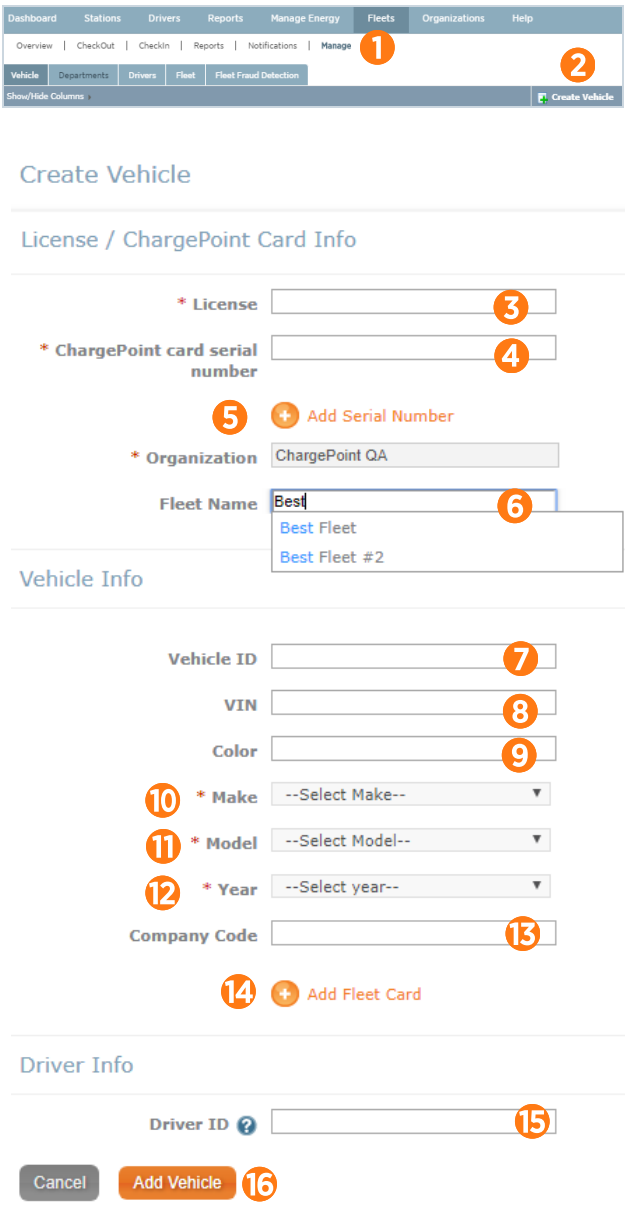


Proceed to"Add Vehicles to Your Fleet" to complete the process.

Add Vehicles to Your Fleet

In ChargePoint, each vehicle is assigned one unique ChargePoint RFID card (although multiple ChargePoint RFID cards per vehicle is allowed). ChargePoint recommends physically attaching the card to the vehicle's key chain or placing the card inside the vehicle's glove box.

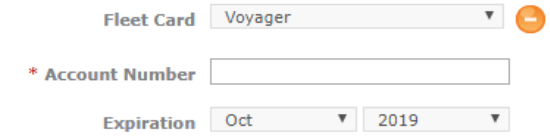
1. Log into ChargePoint and click **Fleets > Manage**. Use the **Vehicle** tab.
2. Click **Create Vehicle**.
3. Enter the **License** plate number.
4. Enter the **ChargePoint card serial number** as it is written on your plastic card, such as *CNCP1234567890*.
5. *Optional*. Click **Add Serial Number** for additional cards.
6. Start entering your **Fleet Name**. Select your **Fleet Name** from the type-ahead list.
7. Enter the unique **Vehicle ID**, such as the asset number you use to track the vehicle in your Asset Management or ERP system.
8. Enter the **VIN** on the vehicle.
9. Enter the vehicle **Color**.
10. Select the car **Make** from the dropdown.
11. Select the car **Model** from the dropdown.
12. Select the car **Year** from the dropdown.
13. In the **Company Code** field, enter an identifier to track the department or company to which the vehicle is assigned or managed.
14. For WEX or Voyager payment methods, click **Add Fleet Card** to specify fuel card details for this vehicle. Required fields vary per type of fuel card. Refer to the fuel card for details. The specific fields are shown on the next page.
15. Enter the **Driver ID**, if you are assigning this vehicle to one specific employee.
16. Click **Add Vehicle**.



Fuel Card Details

Always refer to the card being assigned to the vehicle to complete the fuel card fields.

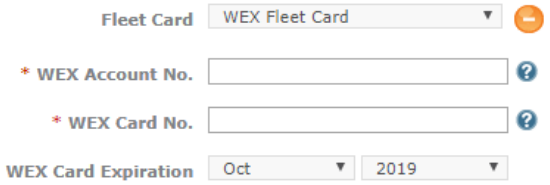
Voyager



Voyager cards require:

- Account number
- Expiration date

WEX



WEX cards require:

- WEX Account number
- WEX Card number
- WEX Card expiration date

Test and Verify the Charging Operation

Once you have created your fleet and added your vehicles to the fleet, verify that each fleet vehicle charges with the ChargePoint card assigned to it. You can test your vehicle on any station that allows your fleet to charge (this is a function of access control). If you did not set up a payment method, you must use a free-of-charge station.

To charge a vehicle:

1. Turn off the vehicle.
2. Tap the vehicle's ChargePoint card on the station's card reader.

   The station beeps once when it reads the card completely.
3. Plug the connector into the vehicle.

   Charging begins when the vehicle acknowledges the station.

To stop a charging session before the end of the charging cycle, remove the connector from the vehicle and return it to the station's holster.

Monitor Your Fleet

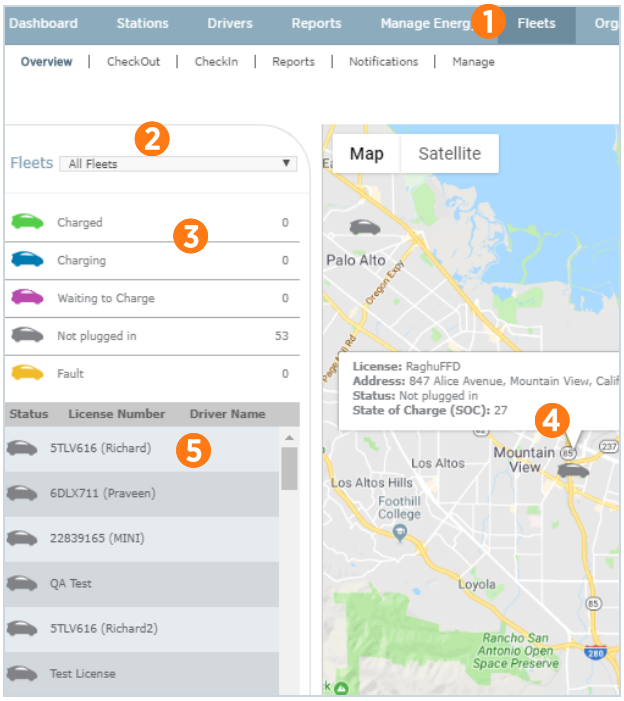
Once a vehicle has been added to a fleet, it is listed on the Fleet Overview page. This provides at-a-glance information about each vehicle in your fleet, including its charging status.

View Your Fleet Status

To view the status of vehicles in your fleet:

1. Log into ChargePoint and click **Fleets**.
2. From the **Fleets** dropdown, select your fleet.
3. View the vehicles in your fleet, which are color-coded by their status.
4. On the map, click on a vehicle to view its information.
5. The vehicle list displays each vehicle's:
   - Status
   - License number
   - Driver name

Note: A vehicle that is not plugged in does not appear on the map.



Generate Reports

Whether you are a station manager or a fleet manager, you can generate reports and use the data for analytics. You can also export that data in graphical and text formats to be shared with others.

- Fleet reports are found under the Fleets tab.
- Station reports are found under the Reports tab.

For additional information on station reports, refer to the *Generate Reports How To Guide*. Log into ChargePoint and click **Help > Video and Manuals** to learn more.

View Your Fleet Reports

ChargePoint provides many reports that show the activity of the fleet vehicles.

1. Log into ChargePoint and click **Fleets > Reports**.
2. Click on the desired type of report:
   - "Analytics" - Graphs of Energy, Gasoline Savings, GHG Savings, and an Overview Table.
   - "Statements" - A table of statements for fleets that have enabled a payment source.
   - "Transactions" - A table of revenue transactions.



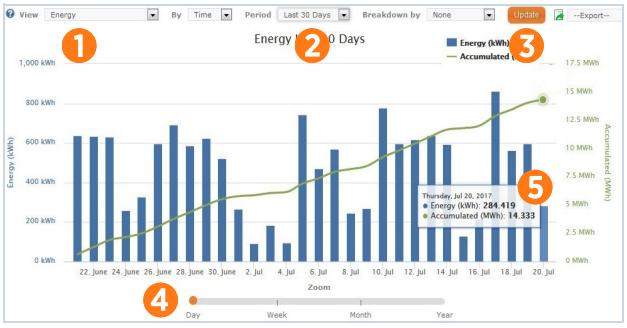
Analytics

The Analytics graphs include:

- **Energy** - The amount of electricity in kilowatt hours (kWh) used by your fleet.
- **Gasoline Savings** - The amount of gasoline (in gallons) that has been saved by using electricity as fuel.
- **GHG Savings** - The amount of greenhouse gas emissions your fleets have saved by using electricity as fuel.
- **Table** - Detailed information about every charging session by all your vehicles, including telematics information (odometer information and the fraud detection results).

For example,

1. In the **View** dropdown, select **Energy**.
2. In the **Period** dropdown, select **Last 30 Days**.
3. Click **Update**.
4. Slide the zoom button to view the data on a daily, weekly, monthly, or yearly basis.
5. Mouse over the line or bars to see a pop-up window with additional data for that point.



Statements

To view the statements for fleets that have enabled a payment source:

1. Log into ChargePoint and click **Fleets > Reports**.
2. Click **Statements**.
3. Click **Show/Hide Columns** to display a list of columns to check/uncheck to customize your report.
4. Click **Export** to immediately download a CSV report to your *Downloads* folder.





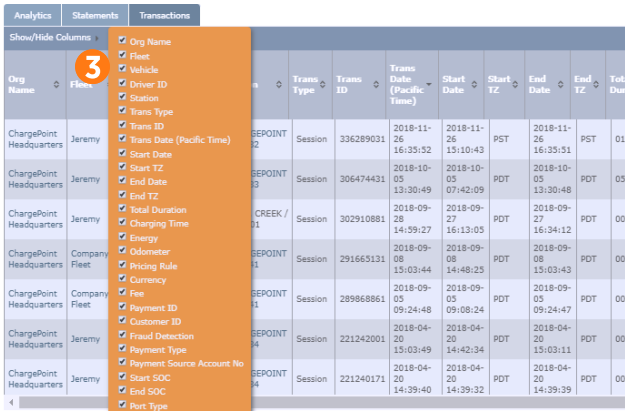
Transactions

To view the detailed information of financial transactions on all charging sessions of your fleet vehicles:

1. Log into ChargePoint and click **Fleets > Reports**.
2. Click **Transactions**.
3. Click **Show/Hide Columns** to display a list of columns to check/uncheck to customize your report.

Note: Free sessions cannot be processed by Voyager and do not appear on your Voyager statement. Free sessions will appear in your WEX statement only if you have opted to receive reporting on free sessions through WEX.





View Fuel Card-Funded Transactions

1. Log into ChargePoint and click **Fleets > Reports > Transactions**.



2. In the **Payment Type** column, you can see WEX- or Voyager-funded transactions.

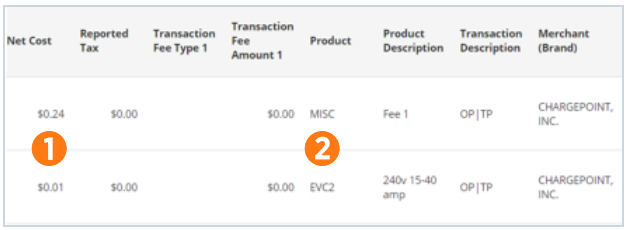
   Note: Although WEX assesses reporting fees for free charging sessions, this transaction table lists only the fees assessed by the station owner--not any reporting fees assessed by WEX.



WEX Portal Free Session Reporting

If your settings include free charging sessions, your WEX report will look similar to the following.

1. Each free charging session has two fees (totaling $0.25 as of March 2019).
2. The two Product codes are:
   - *MISC* - NACS Prod Code 308 (Elec. Fuel)
   - *EVC2* - NACS Prod Code 957 (Report Fee)



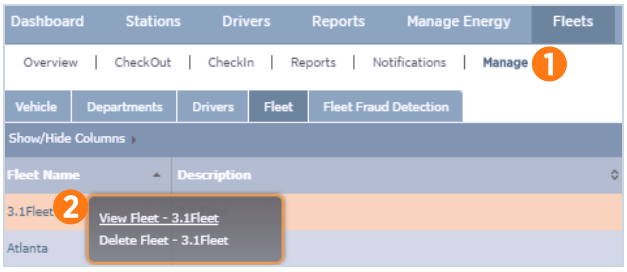
Make Changes to Your Fleet and Vehicles

You can make changes to your fleet and its vehicles in ChargePoint.

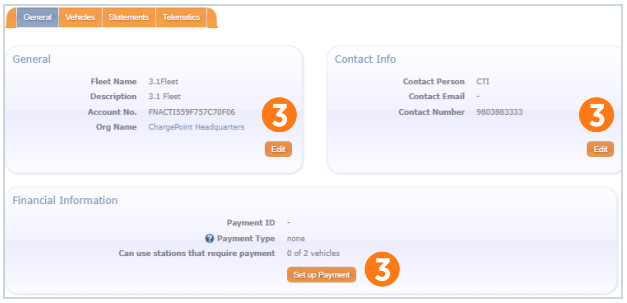
Edit or View a Fleet

To edit or view an existing fleet:

1. Log into ChargePoint and click **Fleets > Manage > Fleet**.
2. Click anywhere on the row of the Fleet you want to **View Fleet**.



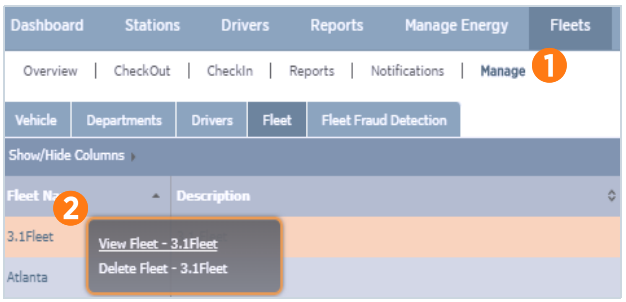
3. For the section you wish to edit, click the corresponding **Edit** or **Setup Payment** button.



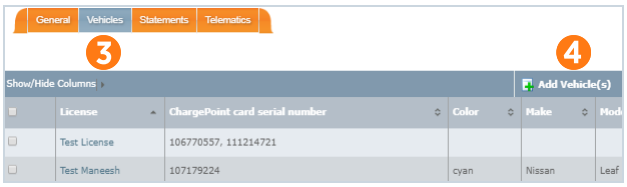
Add a Vehicle to a Fleet

To add a vehicle to an existing fleet:

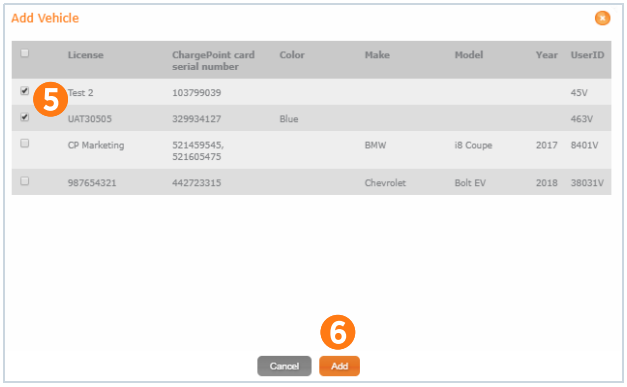
1. Log into ChargePoint and click **Fleets > Manage > Fleet**.
2. Click anywhere on the row of the Fleet you want to add vehicles and click **View Fleet**.



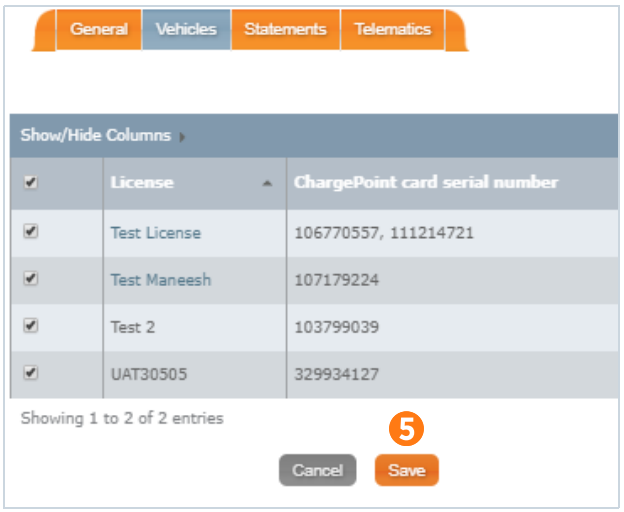
3. Click the **Vehicles** tab.
4. Click **Add Vehicle(s)**.



5. Click the checkboxes of the vehicles you want to add to this fleet.
6. Click **Add**.



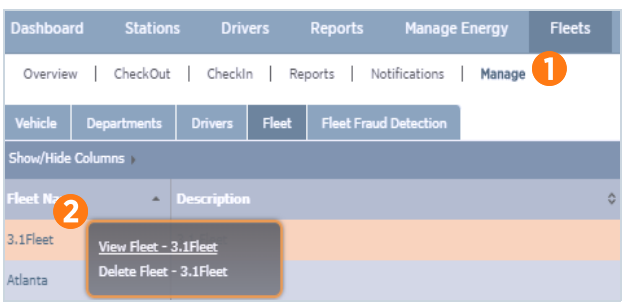
7. Click **Save**.



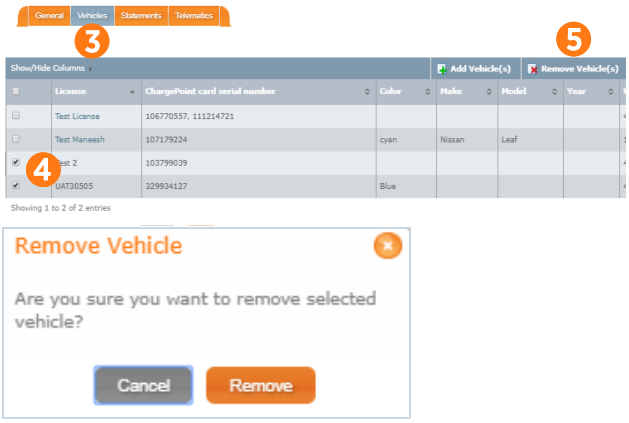
Remove a Vehicle from a Fleet

To remove a vehicle from a fleet:

1. Log into ChargePoint and click **Fleets > Manage > Fleet**.
2. Click anywhere on the row of the Fleet you want to remove vehicles and click **View Fleet**.



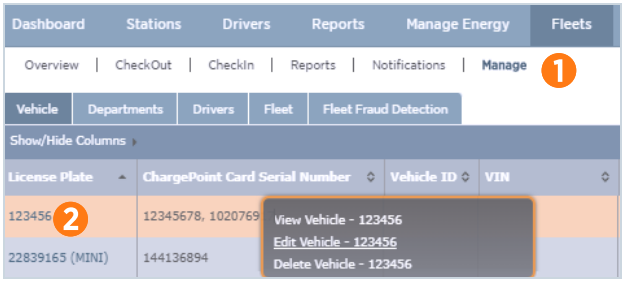
3. Click the **Vehicles** tab.
4. Select the checkboxes of the vehicles you want to remove.
5. Click **Remove Vehicle(s)**.
6. Click **Remove**.



Edit or View a Vehicle

To view or edit the details of a vehicle:

1. Log into ChargePoint and click **Fleets > Manage**.
2. Click anywhere on the row of the Vehicle you want to modify or view and click **Edit Vehicle**.



3. Enter the vehicle **License** plate number.
4. Enter the **ChargePoint Card Serial Number**. *Optional.* Click **Add Serial Number** if you have additional numbers.
5. *Optional*. Enter the **Fleet Name** this vehicle belongs to.
6. *Optional*. Enter a **Vehicle ID** within the fleet.
7. *Optional*. Enter the vehicle's **VIN** number.
8. *Optional*. Enter the **Color** of the vehicle.
9. In the **Make** dropdown, select the vehicle's manufacturer.
10. In the **Model** dropdown, select the vehicle's model.
11. In the **Year** dropdown, select the vehicle's manufactured year.
12. *Optional*. In the **Fuel Card** dropdown, select which Fuel Card this vehicle belongs.
13. Enter the **Account Number** of this vehicle.

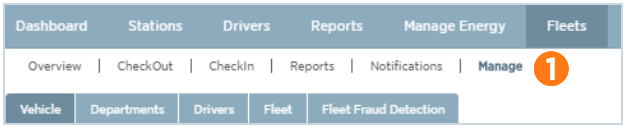


14. *Optional*. In the **Expiration** dropdown lists, select the month and year this account expires.
15. *Optional*. In the **Telematics** dropdown, select *None* or the name of your Telematics.
16. *Optional*. In the **Fraud Detection** dropdown, select *Enabled* or *Disabled*.
17. *Optional*. Enter the **Driver ID**, if this vehicle is assigned to a specific driver.
18. Click **Update Vehicle**.

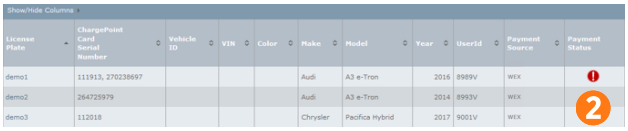
Fuel Card Expiration

ChargePoint emails fleet managers when their WEX Cards or Voyager Cards are nearing expiration.

1. Log into ChargePoint and click **Fleets > Manage > Vehicle**.



2. The Vehicle table indicates expiration, as well as, invalid Fuel Cards. Hover over the icon to see an additional explanation.



Update the card or expiration date using the Edit or View a Vehicle instructions.

Optimize Your Fleet

Reduce Expenses With Scheduled Charging

Scheduled charging allows your company to save money on fuel costs while still being convenient for your fleet drivers. Drivers can plug in as soon as they return to the depot; your stations then delay charging until electricity rates are lower. When the scheduled charging policy is enabled, you can override the policy on a specific vehicle, as necessary. You can also make changes to the existing policy or remove it.

Additionally, fleet managers don't need to configure the charging timer in their vehicles, a process that may vary by make and model. Setting the vehicle's charging timer may also prevent the vehicle from charging at public stations during the work day without the driver explicitly overriding it.

For details, see the *Manage Energy How To Guide*. Log into ChargePoint and click **Help > Video and Manuals** to learn more.

Configure Power Management

ChargePoint Power Management enables money saving on both capital and operating expenses. You can install more stations while deferring or avoiding electrical equipment and service upgrades. You can also avoid costly demand charges by setting a threshold for peak power delivery.

For details, see the *Manage Power How To Guide*. Log into ChargePoint and click **Help > Video and Manuals** to learn more.

Charging Stations

ChargePoint offers a variety of smart, networked charging stations to serve the needs of every fleet. The ChargePoint CPF family of AC charging stations is specifically designed for light-duty and medium-duty fleet applications, where the stations are used exclusively by fleet vehicles.

For mixed-use applications, where fleet vehicles share charging stations with drivers of personal vehicles, ChargePoint offers the CT4000 and CP4000 family of AC charging stations.

For bus and truck applications, and for passenger and light-duty vehicles requiring fast turnaround, ChargePoint offers an industry-leading suite of DC Fast chargers.

To learn the right product mix based on your fleet charging needs, contact your ChargePoint sales representative.

Station Activation

Before you can use your charging stations, they must be installed and activated. During installation, the installer prepares a Post-Installation Checklist for each station and gives those checklists to you. Attached to the bottom of each checklist is the activation label that you will need to activate the station on ChargePoint.

You can activate the stations yourself or purchase Activation and Configuration Service from ChargePoint. When you purchase this service, a Support Specialist works with you to activate and configure your stations.

To do it yourself, instructional videos and printable step-by-step instructions are available in ChargePoint. Log into ChargePoint and click **Help > Video and Manuals**.

Control Access to Stations

To set up policies for who can use your stations and when they can be used, refer to the *Control Access to Stations How To Guide*. Log into ChargePoint and click **Help > Video and Manuals** to learn more.

Integrate Telematics (Beta)

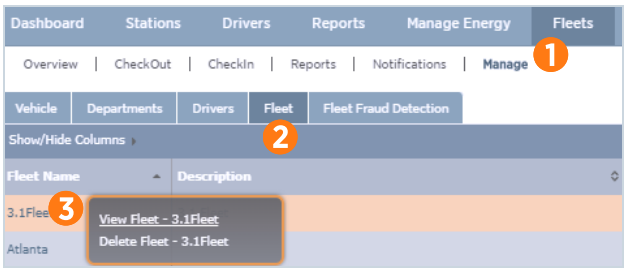
ChargePoint integrates with leading telematics providers to enable advanced features such as automatic odometer capture and fraud prevention, such as a fleet driver using a Fuel Card to charge a personal vehicle.

Currently, ChargePoint has integrated with FleetCarma and is compatible with the FleetCarma C5 device. To enable telematics integration, you need to obtain and install supported telematics devices in all your fleet vehicles. For more information, contact your ChargePoint Sales Representative.

Enable Telematics Integration for the Fleet

To set up telematics integration on ChargePoint, you need the user name and password that you use to access your telematics reports.

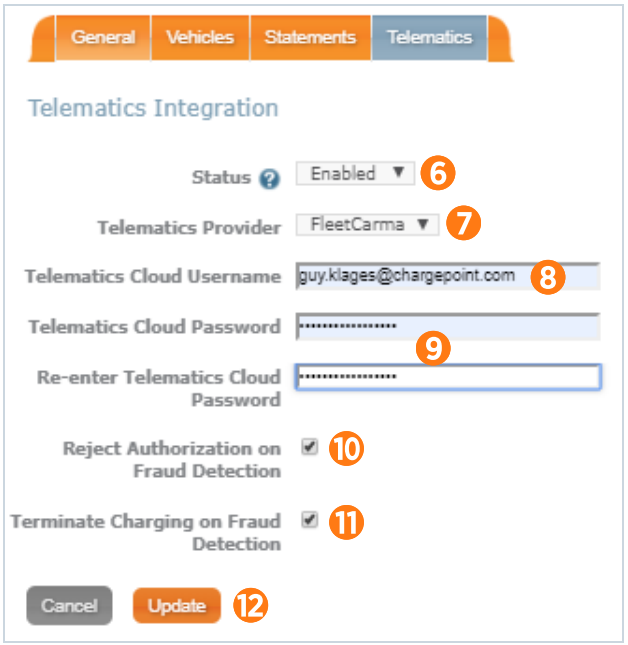
1. Log into ChargePoint and Click **Fleets > Manage**.
2. Click **Fleet**.
3. Click anywhere on the row of the fleet you want to enable telematics and click **View**.



4. Click **Telematics**.
5. Click **Edit Mode**.



6. In the **Status** dropdown, select *Enabled*.
7. In the **Telematics Provider** dropdown, select *FleetCarma*.
8. In the **Telematics Cloud Username** field, enter the ID you use to log into your Telematics Provider's website.
9. In the **Telematics Cloud Password** field, enter your Telematics Provider's website password. The username/password is needed to allow ChargePoint to retrieve vehicle status and location from the Telematics provider's API.
10. *Optional*. The **Reject Authorization on Fraud Detection** checkbox, when selected, rejects an authorization if fraud is detected.
11. *Optional*. The **Terminate Charging on Fraud Detection** checkbox, when selected, ends the current charging session if fraud is detected.



Note: ChargePoint recommends that you leave these two boxes unchecked initially while becoming familiar with the telematics integration. You can use them later to prevent fraud if it is detected. Without these two boxes checked, fraud will be detected and reported, but not stopped.

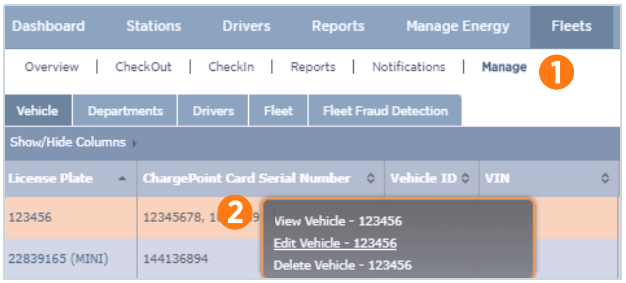
12. Click **Update**.

    Telematics is now enabled for that fleet.

Enable Telematics for Individual Vehicles

You need the VIN of each fleet vehicle to complete this task, and you must do this for each one of your fleet vehicles.

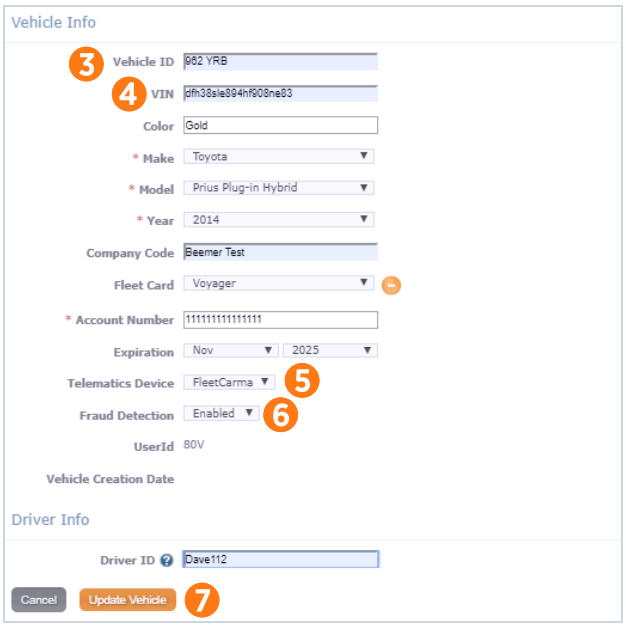
1. Log into ChargePoint and Click **Fleets > Manage**.
2. Click anywhere on the row of the License Plate you want to enable telematics and then click **Edit Vehicle**.



3. Enter the **Vehicle ID**, if not already entered.
4. Enter the **VIN**, if not already entered.
5. From the **Telematics Device** dropdown, select *FleetCarma*.
6. From the **Fraud Detection** dropdown, select *Enabled*.
7. Click **Update Vehicle**.

   A green checkmark in the Telematics Status column means that all vehicle information is entered correctly.

   Repeat steps 2 through 7 until all your fleet vehicles are set up.



Appendix

CPF Charging Station LED Colors

When the CPF family of charging stations are powered on and activated, the ring surrounding each holster illuminates to indicate the following status:

LED	Meaning
	No LED indicates that the charging station is idle (including vehicle plugged in but not authorized).
	Solid white indicates that the charging station is not activated.
	Pulsing yellow indicates that authorization is in progress.
	Pulsing green indicates that the card is approved and schedule is set to delay charging.
	Solid green indicates that the card is approved and station is ready to charge.
	Pulsing blue indicates that the vehicle is charging.
	Solid blue indicates that the vehicle is plugged in but not yet charging or the vehicle is fully charged.
	Solid red indicates that the card is temporary denied or a fault has occurred (permanent).

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