



## EFS eManager Quick Reference Guide

### Log In – First-time User Instructions

1. Go to <https://www.efslc.com>
2. Hover over 'Choose Login Area' in upper right hand corner and click 'eManager' from the drop-down menu
3. Enter your Carrier ID
4. Enter your PASSWORD
5. Click 'Logon'
6. Enter your email address in the box under 'Email Address'
7. Enter a Secure Entry Code on the keypad (5 - 8 digits)
8. Click 'Submit'
9. Re-enter your email address
10. Re-enter the same Secure Entry Code
11. Click 'Submit'

You are now logged into eManager.

REMEMBER: Passwords are Case Sensitive

### Manage Cards

Go to 'Select Program' > 'Manage Cards' > 'View/Update Cards'

#### Activate a Card

- Under 'Card Status', set the card to 'Active'
- Select 'SAVE'

#### Inactivate a Card

- Under 'Card Status', set the card to 'Inactive'
- Select 'SAVE'

#### Add Prompts/Validations to a Card

- Click 'Add Prompt' on the middle left side of the screen
- Select the prompt to be entered (ex: Unit Number)
- Select the validation of the policy (ex: Exact Match)
- Enter the Value (ex: 1234)
- Add additional information until all values are established

\*\*Note: If prompt needs to be added to ALL cards, follow the same process outlined above, but go to 'Manage Policies' from the 'Select Program' menu in the upper right of the screen.

To 'Edit' or 'Delete' card prompts, select the 'EDIT' or 'DELETE' buttons to the right of the 'Value'.



### Add Limits to a Card

- Hover over 'Limits' along top of screen
- Select 'Update Limits'
- Select 'Add Limit'
- From list, select Limit to be added, then 'next'
- Add amount and hours – for example, if adding a Cash Advance, it may be \$100 every 48 hours

\*\*Note: If limit needs to be added to ALL cards, follow same process outlined above, but go to 'Manage Policies' from Select Program in upper right.

### Add a Cash Advance on Card – 'One-Time Cash'

Go to 'Select Program' > 'Cash Advance'

- Select the card by clicking on the card number
- The 'Add One-Time Cash' screen displays
- Enter the amount for the cash advance and any other reference numbers ('10' and '10.00' are both equal to \$10.00)
- Select 'ADD CASH'
- To remove cash, the same steps are followed; however, at the bottom select 'REMOVE CASH'

### EFS MoneyCodes®

Go to 'Select Program' > 'MoneyCodes' > 'Issue MoneyCode'

- Enter the amount of the MoneyCode ('10.00' is ten dollars)
- Enter name in 'Issue To'
- Enter any applicable notes
- Select 'ISSUE MONEYCODE'
- The Money Transfer Code will display at the top of the screen. The MoneyCode number is ten digits. Verify the identity of the caller to be certain the authorized user is receiving the code.

### Reports and Exports

Go to 'Select Program' > 'Reports/Exports'

All reports/exports are available through this link and most are available in PDF or Excel. The most common report is the 'Transaction Report'.

To pull a transaction report,

- Enter dates for the desired report
- Enter your search/match by parameters (if any)
- Hit 'Submit'

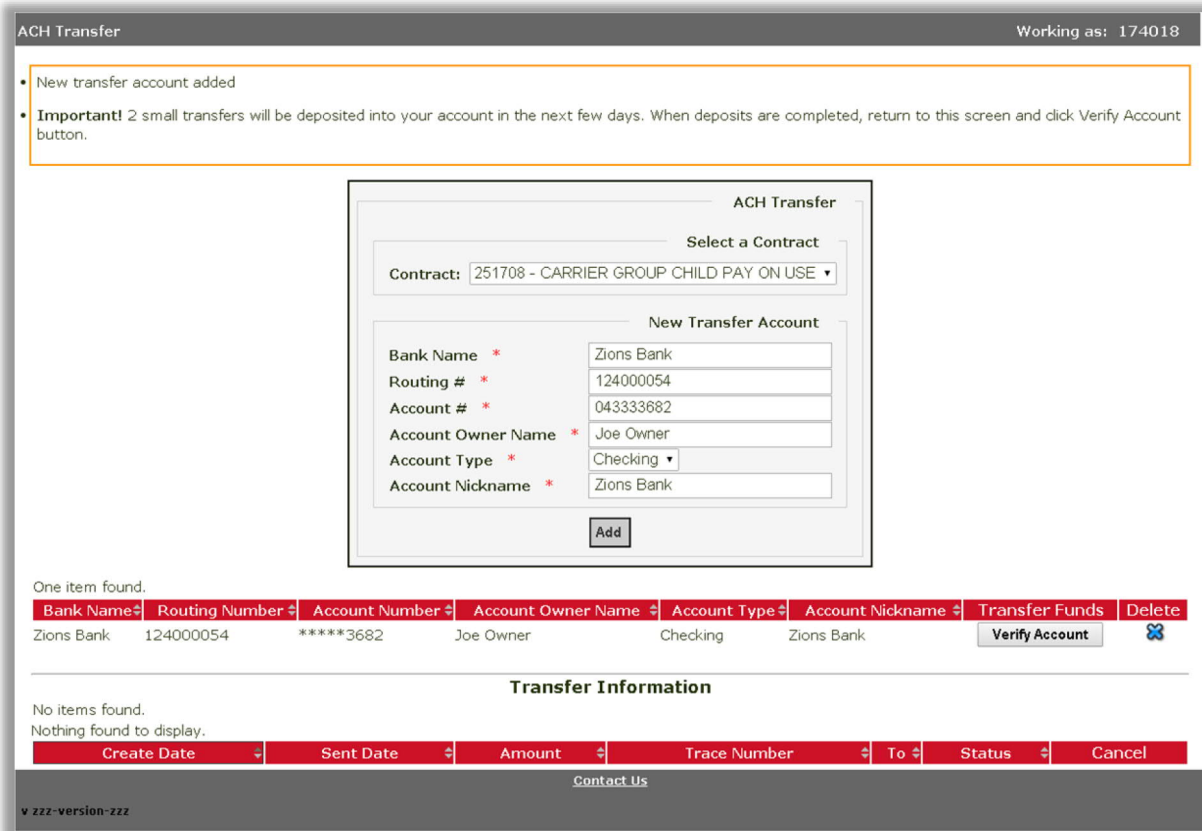
### IMPORTANT CONTACT INFORMATION

EFS Customer Service: 888.824.7378, prompt '2'

IVR (Interactive Voice Response): 888.824.7378

# ACH Transfer Instructions

## Set up external bank accounts to transfer funds



ACH Transfer Working as: 174018

- New transfer account added
- Important!** 2 small transfers will be deposited into your account in the next few days. When deposits are completed, return to this screen and click Verify Account button.

ACH Transfer

Select a Contract

Contract: 251708 - CARRIER GROUP CHILD PAY ON USE

New Transfer Account

Bank Name \* Zions Bank

Routing # \* 124000054

Account # \* 043333682

Account Owner Name \* Joe Owner

Account Type \* Checking

Account Nickname \* Zions Bank

Add

One item found.

Bank Name	Routing Number	Account Number	Account Owner Name	Account Type	Account Nickname	Transfer Funds	Delete
Zions Bank	124000054	****3682	Joe Owner	Checking	Zions Bank	Verify Account	

Transfer Information

No items found.  
Nothing found to display.

Create Date	Sent Date	Amount	Trace Number	To	Status	Cancel
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Contact Us

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1. Go to Select Program > ACH Transfer
2. Enter Bank Name, Bank Routing Number, Bank Account Number, First and Last name on the account, Account Type & Account Nickname
  - No limit on number of accounts that may be set up

*\*\*\*EFS LLC will make 2 small test deposits to account within the next 24 to 48 hours. User will need to check with their bank and get the amounts of these 2 test deposits to verify bank account information online\*\*\**

## Verify Account

1. Select Program > ACH Transfer
2. Select Verify Account, enter the amount of the two test deposits.
3. If entered correctly, message will be "Account Successful".

## Transfer Funds

1. Select Program > ACH Transfer
2. Click on the button under the line that says Transfer Funds. A pop-up box will show the current available balance on account.
3. Enter the amount and click Transfer.



## Your Carrier ID:

Welcome to your **EFS Fuel Card Program!** We look forward to finding innovative ways to make managing your payments easier.

### **To Activate Your Account and Cards:**

Enclosed in this package, you'll find your EFS cards, which are issued by WEX Bank (a member of FDIC). Please follow these simple steps to activate:

#### **1 – Access your Account Password.** You should have already received two e-mails from our set-up team:

- An e-mail containing your Carrier ID and program materials
- A separate e-mail containing your password

You will need both your Carrier ID and Password to gain access to your EFS account. If you did not receive an e-mail containing your Password, please contact our Customer Support at 888.824.7378, press "0", and indicate that you need your password.

#### **2 – Activate Your New Cards.** Your new cards must be activated prior to use. EFS provides several convenient ways to activate and manage your cards.

- Automated IVR: Call toll-free, 24/7, 888.824.7378, option "2".
  - NOTE: Convert your password to the equivalent letters on your number keypad.
- eManager: Visit [WWW.EFSLLC.COM](http://WWW.EFSLLC.COM), go to the "Login" menu in the upper right-hand corner of the website, select "eManager", enter your Carrier ID and Password.
  - NOTE: A quick reference guide is included in this packet.
- Mobile App: EFS Mobile Manager Source<sup>SM</sup>, our mobile smartphone application for iPhone and Android devices. Simply visit the app stores and search "EFS" to download Mobile Manager Source.
  - NOTE: A quick reference guide is included in this packet.

Please note that your cards have been pre-set with 250 gallons of diesel every 24 hours. Adding additional products, as well as adding validation prompts, can be completed via eManager. For instructions on doing this, see the enclosed eManager Quick Reference guide or simply call us at 888.824.7378, option "2".

For your convenience, we have enclosed the following reference items in this package:

- eManager Quick Reference Guide
- Mobile App Quick Reference Guide
- Frequently Asked Questions
- Cardholder PIN set up instructions

Thank you for choosing EFS - a WEX Company for your payment needs. If you have any questions, please contact EFS Customer Support at 888.824.7378.

Your EFS Team



# FREQUENTLY ASKED QUESTIONS



708305 100  
1234567890

Thank you for choosing EFS – a WEX Company (EFS) for your innovative payment needs. Here are a few frequently asked questions that will help you manage your EFS Card\* program(s). If at any time you have further questions, please feel free to contact our 24-hour Customer Service department at **888.824.7378**.

## **Q: What is my Carrier ID and Password?**

**A:** Your Carrier ID and password are the two pieces of information you are required to have when accessing your account through eManager, the EFS Voice Response System, our mobile smartphone applications, or when speaking with any EFS Customer Service or Credit personnel. Your Carrier ID is listed on the enclosed welcome letter; you will need to contact your Account Manager by following the instructions in the enclosed letter to obtain your password. Please keep in mind that your Carrier ID and password should be given ONLY to persons who are authorized to make account changes.

## **Q: How do I prevent my cardholders from making unauthorized purchases?**

**A:** When you set up your program policy, remember that you can select specific items you wish to allow your cardholders to purchase. For example, limiting 250 gallons of fuel every 24 hours will prevent unauthorized uses of the EFS card. To avoid unnecessary delays, please keep your cardholders informed as to what items they are allowed to purchase.

## **Q: How do I prevent unauthorized persons from using my cards?**

**A:** The information you require your cardholders to provide will act as a protection for you and your cardholders. Only persons with the specific required information will be able to use the card. The card may be setup to match a specific item.

Examples of required information:

**Driver ID #    Trip #    Unit #    Trailer #    Control #**

*To avoid unnecessary delays, please keep your cardholders informed as to the information they are required to provide at the time of purchase.*

**888.824.7378 | EFSLLC.COM**

\* EFS Cards issued by WEX Bank. Member FDIC.  
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**Q: What if one of my cards is lost or stolen?**

**A:** If one of your cards is lost or stolen, that card should be inactivated, deleted, or placed on hold immediately. That card is now useless to anyone until the status is changed back to “active”. Log in to eManager to perform these functions immediately by visiting [www.efslc.com](http://www.efslc.com) and selecting “eManager” from the “LogIn” menu in the upper right-hand corner of the website.

**Q: What is my eManager Secure Entry Code?**

**A:** In order to provide you with the highest level of security, you will be required to set up a Secure Entry Code when logging into eManager for the first time. In addition, you will be required to click on the Secure Entry Code after logging into eManager from a new computer and at various random times for security purposes. Be sure to either memorize your code or keep it recorded in a secure place. Do not share your Secure Entry Code with anyone unauthorized to make card changes.

**Q: How do I allow my cardholders to fuel if they don't have a card with them?**

**A:** Log into eManager and set the cardholder's card to allow “manual entry”. Notify the cardholder of the card number; the cardholder will then be allowed to enter the number by hand at the pump instead of swiping the actual card. Remember to switch the card back to “swipe only” when the cardholder has the card in hand again.

**Q: What if I have an emergency or an unusual situation that requires extra fuel or money?**

**A:** We realize that in some cases of unusual circumstances, you will temporarily need to change a card's limits or available options. That is why we offer you the “override” option. After the override transaction has been processed, the override policy is removed and the previous card limits/ locations return. If the override is for cash, please select the option for a “one-time cash advance”.

**Note:** the cash will remain on the card until the cardholder depletes the funds. You can perform these functions by logging into eManager at [www.efslc.com](http://www.efslc.com), or by using our mobile phone app.

**Q: What if I have two divisions requiring separate limits?**

**A:** You will be able to have multiple policies in this case. Log into eManager and set up several default policies and select which default each particular card needs. This allows individual card management for companies requiring more specialized fleet policies.

Please call us with any questions or problems you may have. For general questions, please call our toll-free phone number to reach a Customer Service Representative. If you have a more specific question or problem, please contact your Account Manager at the same number. Someone is here for you 24 hours a day and 7 days a week.

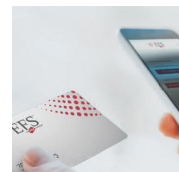
Don't forget, you can manage your cards through eManager, our IVR, or our mobile smartphone applications.



*eManager LogIn at EFSLC.COM*



*IVR Automated Phone System*



*Mobile Smartphone Apps*

## Control your fleet and control the road with EFS CarrierControl for Fleet Managers

Manage time-sensitive employee or contractor card needs anytime and anywhere from your mobile device with the new EFS CarrierControl mobile app. This convenient, secure mobile app allows you in real-time to:

- Quickly authorize MoneyCodes® for checks
- Track MoneyCode transactions
- View real-time card transaction detail including rejected transactions to proactively address any unauthorized use
- Inactivate, activate or put a card on hold instantly in real time
- View real-time credit balances and limits
- Real-time overrides to EFS Card\* limits
- Load cash to cards in real time



Download the app from the Apple App Store or Google Play. While the app is free for the public to download, users must be a current EFS customer with a valid and active eManager User ID and password in order to use this app.



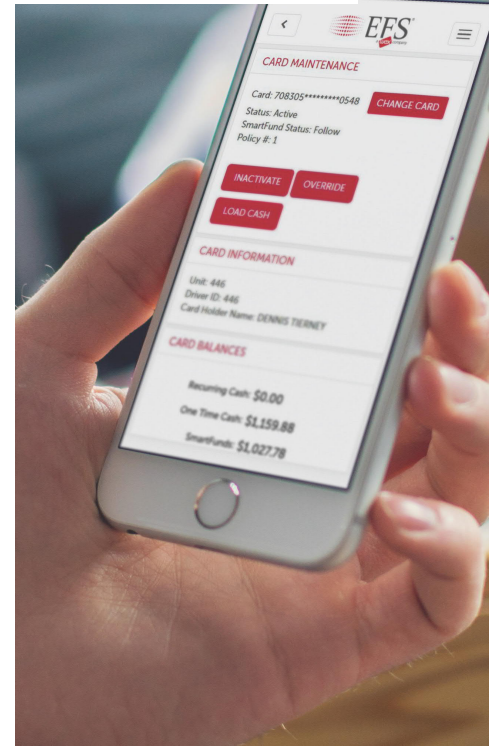
On the road and on-the-go,  
EFS keeps you moving

**NOTE:** This mobile application should not be used when behind the wheel. Please only use when safely parked and not while driving.

## Control your fleet – Control the road

Manage time-sensitive employee or contractor card needs anytime and anywhere – from your mobile device.

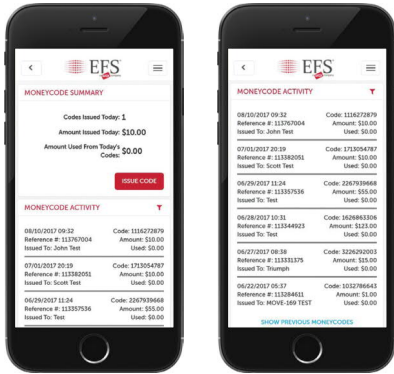
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Getting started with  
**EFS CarrierControl**

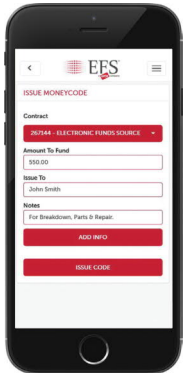
## Features: MoneyCode Manager

Summarizes MoneyCode usage and activity and allows you to issue new MoneyCodes instantly. Filter and search options allow you to easily locate specific transactions.



### MoneyCode Manager Screen

Displays the summary and the detailed activity for today's MoneyCodes issued – with the ability to filter and search for easier viewing. You can also access previous MoneyCode history from this screen.

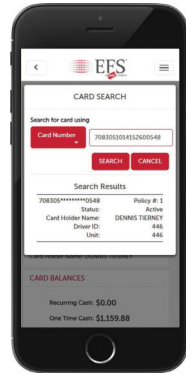


### Issue Code Screen

Allows you to issue MoneyCodes for check authorization. Simply select the contract, input the dollar amount, person and any notes and instantly issue the code in real time.

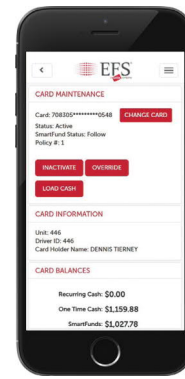
## Features: Card Maintenance

Allows you to search by card number in order to manage card details. Depending on the type of card, you can select either the 'Company' or 'SmartFunds' side of the card to manage. You can view card activity and balances, inactivate or activate the card, put the card on hold status, override the card limit(s) and load cash to the card.



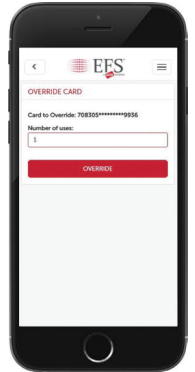
### Select a Card Screen

Search by card number, Driver ID, Driver Name, Unit, Policy or X-ref to find the card you want to view or manage. Once the card information populates, you'll be able to see the card details including status, policy, cardholder name, balances, real-time transaction activity and access the 'status', 'override' and 'load cash' pages from here.



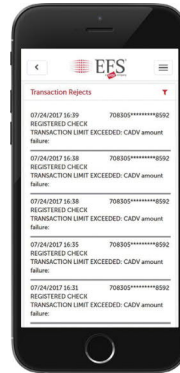
### Inactive/Active Screen

Depending on the current status of the card (active or inactive), you'll click the button to change the current status of the card in real time. Simply select the new status and 'Change Status'.



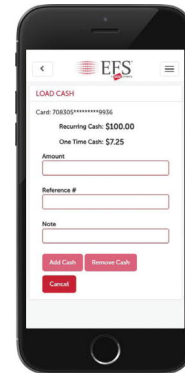
### Override Screen

Allows you to override the card's limit and the number of uses per day in real time. Additional uses are only available for the current day.



### Transaction Rejects Screen

Real-time visibility into daily transaction activity allows you to proactively address potential unauthorized or improper use.



### Load Cash Screen

You can load cash to cards in real time by selecting the card number and the 'side' of the card (if applicable) in which to load the funds.

## START USING YOUR EFS CARD TODAY!

You will first need to set up your PIN via the EFS Automated Phone System, for use at ATM and Debit Card locations, and when logging into EFS eManager or Mobile Applications. You must set up your PIN within 24 hours of Carrier card activation. **To set up your PIN:**

### First-time Users, Initial PIN Setup:

- 1 Call 888.824.7378, 24 hours a day, 7 days a week
- 2 Press "3" for cardholder options
- 3 Enter your card number followed by the "#" key (Example: 708305 000 0000000 000#)
- 4 When asked to enter your PIN, enter the last 4 digits of your EFS card followed by the "#" key
- 5 You will then be asked to change your PIN
- 6 Press "1" to confirm new PIN

### Main IVR Cardholder Options:

- 1 Call 888.824.7378, 24 hours a day, 7 days a week
- 2 Press "3" for cardholder options
- 3 Enter your card number followed by the "#" key (Example: 708305 000 0000000 000#)
- 4 Enter your PIN followed by the "#" key (Example: 1234#)
- 5 You can then choose from the following menu:
  - To register an EFS Check, press "1"
  - To check available cash, press "2"
  - To change your PIN, press "3"
  - To speak to Customer Service, press "0"



**EFS cards are accepted** at all ATMs in the Cirrus and STAR networks, as well as Maestro and STAR Debit point-of-sale locations.

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**Welcome to the EFS Card**

## Manage Your Card and Find Fuel Locations with the EFS CardControl Mobile App

**EFS CardControl** is the innovative source that allows you convenient access to your EFS card functions while on the go. This app allows you to manage your cards anytime and anywhere from your mobile device. This convenient, secure mobile app is your ultimate source for EFS card access and control.

CardControl users can:

- Get real-time card balances and recent transaction details
- Register Checks
- Find fuel prices and locations based on a specific location (e.g. location of your mobile device)
- Find fuel prices and locations by route



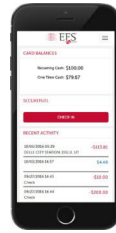
Download the app from the Apple App Store or Google Play. While the app is free for the public to download, users must be a current EFS customer with a valid and active EFS card number and PIN in order to use this app.

On the road and on-the-go, EFS keeps you moving



**NOTE:** This mobile application should not be used when behind the wheel. Please only use when safely parked and not while driving.

## Real-Time Card Balances



### Get Card Balance

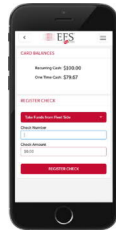
The Home screen gives you immediate access to view the available funds on your card.

You can also see recent transaction history (up to the last 4 transactions).

### Account Activity

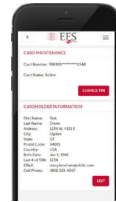
Selecting **Account Activity** allows you to view a more detailed history of your card transactions.

Select 'more' at the bottom of the screen to see the next page (if applicable)



### Register Checks

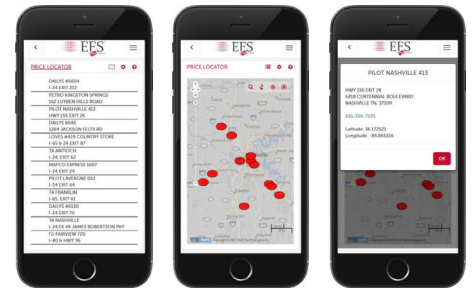
You can register a check from the mobile app by using funds on your card. Simply select which 'funds' you want to use to issue the check, enter the check number and amount, and 'register' the check.



### Card Maintenance

The **Card Maintenance** menu allows you to edit your cardholder profile information – plus change your PIN right from your mobile app!

## Searching Fuel Locations



Find fuel stops using the map view, or by entering your location. By touching any of the fuel price icons, you are taken to a screen with more details on the location, including the ability to call the location directly. You can also view the search results on the map or in list view for easy navigation.

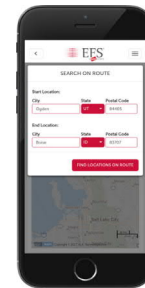
### The Quickest Route to Fuel Cost Savings

EFS CardControl can help you quickly navigate towards the nearest, approved fuel location based on your location or by route.

### Automatically Find Nearest Locations

When you select **Price Locator**, you are automatically taken to the U.S. map where the nearest fuel locations, based on the current location of your mobile device (default search method) will be displayed. The green map icon denotes the lowest price fuel location based on your search results.

**NOTE:** the number of locations displayed in the search results will reflect the "preferences" set for radius and miles/kilometers. You can edit these preferences from the menu icons.



### Find Locations by Route

To find locations along a specific route, touch the 'route' icon at the top of the map then enter the route details to map the best locations along your route.