



USER GUIDE

Fuel BI User Guide



FUELBI
FUELING YOUR FLEET WITH INTELLIGENCE

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HOW DOES IT WORK?

01



Set up account with fuel card provider

02



Authorization for transaction files will be requested

03



During configuration, establish the field to be used as link to Geotab® such as Vehicle ID or VIN

04



Data starts to flow daily to our secure redundant servers and is processed against Geotab® data

05



Access to mapping, reporting and data is available directly in Geotab® and with a customized add-in



FUEL CARD INTEGRATION COMPLETES THE PUZZLE

Syncs vehicles with Geotab® with extra fields for data like tank capacity, and fuel type. Add-in only accessible to users given explicit access by admin. Users view only the vehicle data as determined by security in Geotab®.

Fuel BI Add-In Process

- The Partner Support Manager will need to be added to the database that the vehicles and fuel cards will be associated with
 - Support will add the Fuel BI API and Support User
 - Support User will utilize this naming convention: fleetsupport_{databasename}@fuelbi.com
 - Support User will need Admin access (this can be changed after implementation)
- The Fuel BI Add-in will need to be added:
 - Go to System Settings - Add-ins - New Add-in and then paste code below
 - This requires View Only access with Group Access
 - Admin access can be setup for easier implementation
- Custom Security Clearances may be introduced in Geotab to control access to different Fuel BI features
- The subscriptions will automatically populate inside their associated database
 - Subscriptions will need to be subscribed on the Subscriptions page
- Begin to configure your dashboard and reports

Fuel BI Add-In Code

```
{
  "name": "Fuel BI",
  "supportEmail": "support@fleethoster.com",
  "version": "1.0",
  "items": [
    {
      "url": "https://starapps.blob.core.windows.net/fuelbiapp-angular-addin/prod/fbi.html",
      "path": "",
      "menuName": {
        "en": "Fuel BI"
      },
      "svgIcon": "https://starapps.blob.core.windows.net/fuelbiapp-angular-addin/prod/fuelbi\_geotab.svg",
      "icon": "https://starapps.blob.core.windows.net/fuelbiapp-angular-addin/prod/fuelbi\_geotab.svg"
    }
  ],
  "solutionId": "fuelBIBOBO",
  "isSigned": false
}
```



FUELBI

Fueling your Fleet with Intelligence

Welcome to the latest update of Fuel BI, brought to you by Fleet Hoster! Our newly updated Fuel BI application is packed with enhanced features designed to optimize your fleet management experience. Discover improved data analytics, seamless integration with existing systems, and a more user-friendly interface. Stay ahead of fuel costs, monitor consumption patterns, and make data-driven decisions with ease.

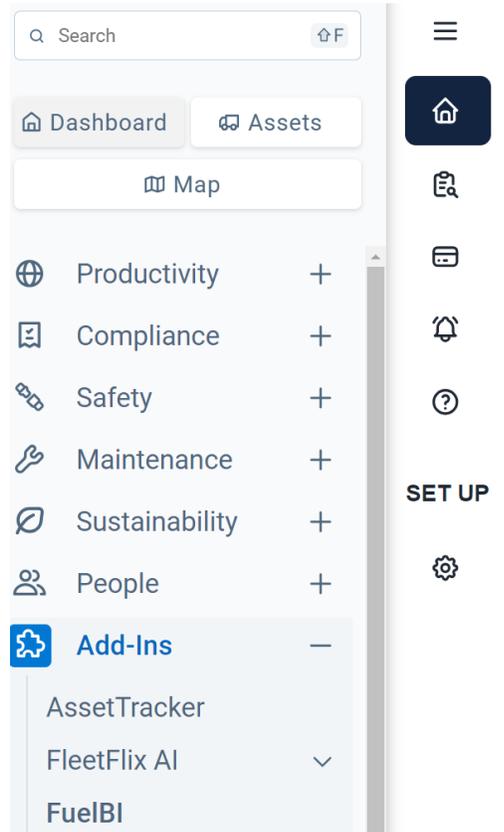
Below is the link to the Fuel BI on the Fleet Hoster Youtube Video:

[Fuel BI Demo](#)

Accessing Fuel BI Add-In

Please ensure that the Fuel BI Add-In is installed.

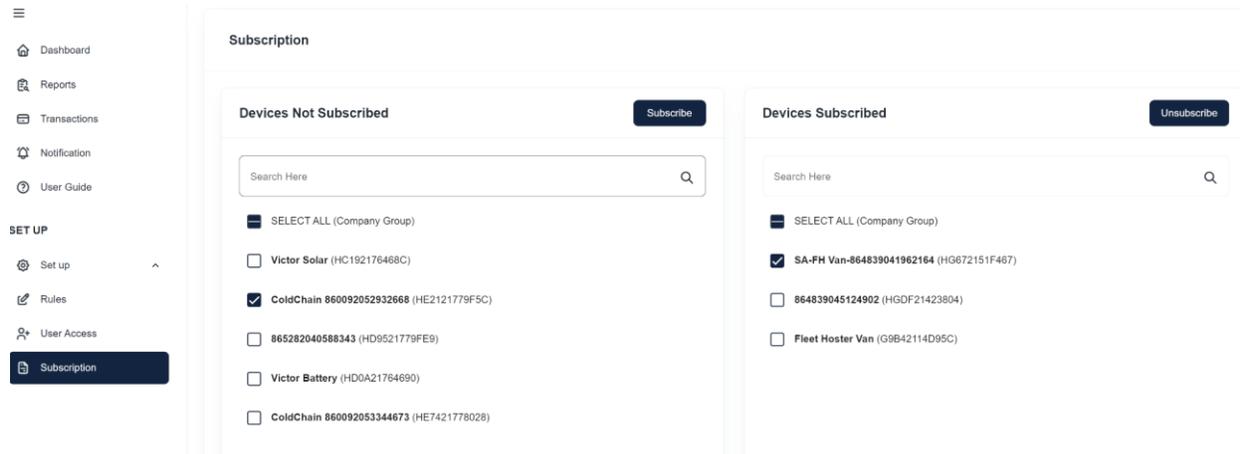
In order to access Fuel BI, click *Add-Ins*, then *FUEL BI*



Subscribing devices to Fuel BI

For Vehicle's to utilize the features of Fuel BI, they must be subscribed to Fuel BI.

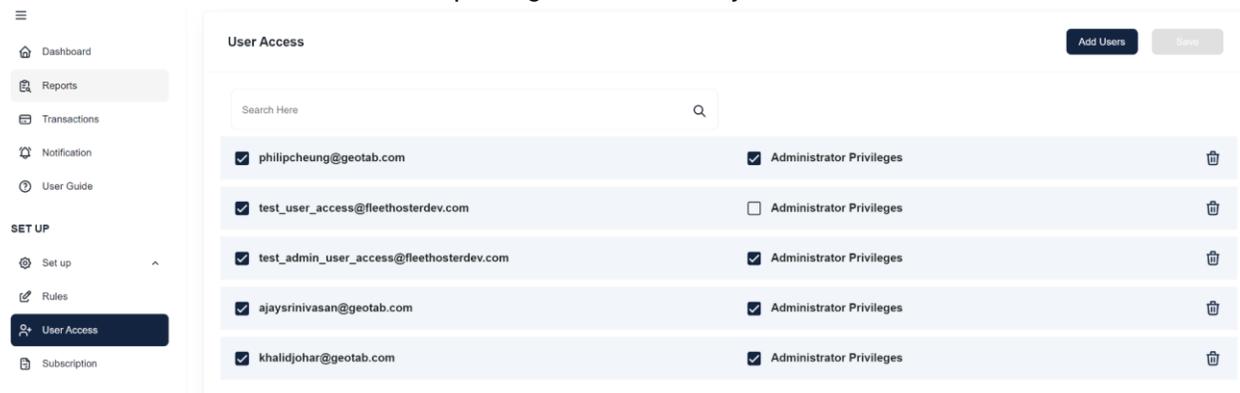
- a. Click the down arrow next to Set up
- b. Click *Subscription*
- c. Under Devices Not Subscribed, select the Vehicle's you would like to subscribe by checking the box next to the Vehicle's Serial Number, then click *Subscribe*. To subscribe all Vehicle's at once, check the box next to *All*. To unsubscribe a Vehicle, check the boxes next to that Vehicle in the Devices Subscribed column and click *Unsubscribe*



Setting up User Access for Fuel BI

This grants users the ability to access Fuel BI. Users must already have access to the Geotab database in order to gain access to Fuel BI.

- a. Under Set up, click *User Access*
- b. Click *Add Users*
- c. Type in the search bar to add the User to the Fuel BI Add-In
- d. Check the box next to the user that needs access
- e. To grant Administrator Privileges, check the box next to Administrator Privileges. Users with Administrator Privileges have full application access including the ability to edit rules while users without administrator privileges can view only



Setting up Rules

This will allow you to create rules when exceptions are made.

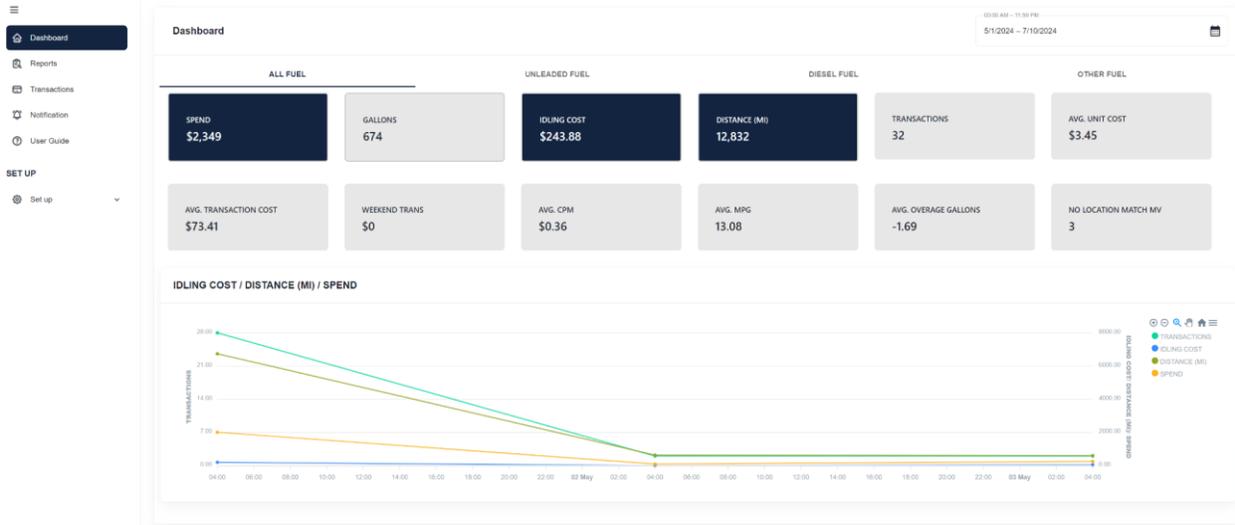
- Under Set Up, click *Rules*
- Click *Add Rules*
- Select which base rule you would like to use from the drop down menu
- Name the rule
- Give the rule a value - this is only for rules that are quantified (ex: if Fuel Overage gal. rule has a value of 2, the rule will trigger when the fuel purchased exceeds the fuel used by the vehicle by 2 gallons or more per transaction)
- Click *Submit*
- To edit a rule, click the edit button
- To make a rule inactive or reactivate it, toggle the button next to Is Active:

Name	Base Rule Name	Description	Value	Edit
Log Not Found	Log Not Found	A vehicle log could not be found at the time of the transaction.	0	
Saturday	Day - Saturday	The transaction occurred on a Saturday.	0	
Fuel Type Mismatch	Fuel Type Mismatch	The type of fuel purchased is not the type of fuel designated for this vehicle.	0	
Fuel Overage	Fuel Overage gal.	The quantity of fuel purchased in gallons has exceeded the amount of fuel used by the vehicle by the threshold per fuel transaction.	2	
Test Mile 1	Total Distance Min mi.	Total distance in miles is below the minimum threshold per transaction.	10	

Dashboard

Dashboard shows you an overview of data and trend lines for your fleet's fuel usage. Dashboard can be sorted by date range and fuel type.

- To select a date range for your dashboard, click the calendar icon and chose the time frame you would like to view
- To view your Dashboard by fuel type, click the tab labeled with the fuel type you would like to view
- To change your Dashboard's trend graph, select the desired subject tiles (the only tiles that can be selected are Spend, Gallons, Idling Cost, Distance)
- To zoom in on the graph, drag your cursor to highlight the desired area
- To export the graph, click the Menu icon and select the desired format



Reports

Reports shows data on your fleet's fuel patterns, categorized by various categories.

- To select a date range for your reports, click the calendar icon and choose the desired time frame
- To view your reports by category, click the tab labeled with the category you would like to view (Day, Card Driver, Geotab Driver, Fuel Type, Serial Number, Transaction Reports, Exportable Reports)
- To sort the report by column, click the column header
- To export your file into Excel format, click *Export*
- Exportable Reports are pre-made reports that quickly allow the user to view and download commonly requested data (Fuel Transaction Details, Non-Fuel Transactions, State/Jurisdiction Transactions, Unmatched Transactions)

Reports 00:00 AM - 11:59 PM
5/1/2024 - 7/10/2024

Day	Card Driver	Geotab Driver	Fuel Type	Serial Number	Transaction Reports	Exportable Reports				
	Search Here					Export				
Card Driver	Card Employee Number	MPG ↑	CPM	AH Distance (mi)	Distance (mi)	Idle rate %	Fuel Overage (gal)	Avg Unit Cost	Quantity (gal)	Total Amount
RICHARD, KOLLAN		0	0	0	0	0	0	\$3.21	28.47	\$91.36
THOMAS, BRODY		4.05	0.93	32.52	75.19	34.28	0.96	\$3.80	19.45	\$73.89
BROOKS, DAMION		4.77	0.82	103.91	202.57	5.4	-15.99	\$4.00	26.34	\$105.34
BROWN, DYLAN		5.46	0.58	0.15	93.31	1.55	-5.19	\$3.80	11.85	\$45.00
KRAEMER, CODY		5.48	0.72	3.55	129.87	4.46	-1.13	\$4.00	22.51	\$90.02
RONCALI, PHILLIP		5.74	0.64	35.78	116.82	4.54	0.41	\$3.70	20.75	\$76.76
BRUMLEY, PRESTON		6.12	0.63	39.92	104.39	5.42	-0.07	\$3.90	16.97	\$66.19
NUNEZ, DAMIEN		6.14	0.58	84.81	193.25	19.27	1.66	\$4.30	33.1	\$142.29

Transactions

Transactions shows a list and map view of transactions and can be filtered by various subjects.

- To filter transactions, click on the category and select an option from the dropdown
- To select an alert type, click the alert severity next to the rule filter for each category - *Okay* indicates a match and *Alert* indicates no match
- To export your file into Excel format, click *Export*

The screenshot shows the 'Transactions' dashboard. On the left is a navigation menu with 'Transactions' selected. The main area has a 'Filter By' section with dropdowns for Rules, Card Driver (Breaux, Justin), Merchant City / Zip, and Device Name / Vin. To the right is an 'Alert Severity Options' section with dropdowns for Match (Alert), Location (Okay), Log (Okay), and Fuel (Okay). A map shows a location in Port Sulphur, LA. Below the filters is a table with columns: Match, Location, Log, Fuel, Fuel Change, Transaction Date, Device, Card Driver, Product, Quantity, and Total Amount. Two transaction records are visible, both with green checkmarks in the Match, Location, Log, and Fuel columns.

- To view each transaction in detail, click the transaction record

The screenshot shows the 'Details' view for a transaction. It is divided into four sections: Transaction, Merchant, Card, and Vehicle. Each section contains a table of key data points.

Transaction						
Transaction ID	Transaction Time	Account Code	Sub Account Code	Card Number	Card Provider	
5618730054000004	05-01-2024 02:01 pm	100026391	869101048	06631	USBANK	

Merchant			
Merchant Verified	Distance from Device (meter)	Merchant Name	Merchant Address
No	3	CHEVRON 0109156	28564 HWY 23, PORT SULPHUR, LA, US 70083

Card						
Card Employee Number	Driver ID	Driver Name	Vehicle Number	Vehicle Description	VIN	Is Fuel
677733	677733	JUSTIN BREAUX	028734	2016 FREDHTLIN	3ALJHCYV402H09891	Yes
Is Unleaded	Is Diesel	Is High Grade Fuel	Is Maintenance	Is Other	Entered Odometer	Product Type
No	Yes	No	No	No	299999	F
Product Description	Quantity (gal)	Unit Price (\$/gal)	Total Amount			
DIESEL	0.04	\$3.50	\$0.14			

Vehicle						
Match Alert Severity	Log Alert Severity	Location Alert Severity	Fuel Alert Severity	Device Name	Device VIN	Device Serial Number
✓	✓	✓	✓			H0472151F467

Notification Settings

Notification Settings lets you schedule rule violation emails to users at set intervals.

- To set up email notifications, click *Add Notification*
- Select the notification parameters you want to set up, then click *Submit*

Add Notification

Type: Individual

Username / Email: test_admin_user_access@fleethosterdev.com

Rules: Log Not Found, Test Mile 1, Fuel Type Mismatch

Notification Interval: Weekly

Start Day: Monday

Start Time: 08:00 AM

Submit Cancel

- To edit a notification, select the pen and paper icon next to the notification
- To delete a notification, click the trash can icon

Notification Settings

Search Here

Email / Groups	Schedule	Active	Action
test_admin_user_access@fleethosterdev.com	Daily at 19:00 pm	✓	
Company Group	Weekly on Monday at 08:00 am	✓	
test_user_access@fleethosterdev.com	Weekly on Friday at 08:00 am	✓	

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