

Fleet Card

USER GUIDE



VALOR
PAYTECH

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Abbreviations and Acronyms

This section provides a list of abbreviations and acronyms with their appropriate full forms to improve user comprehension.

Abbreviation	Full form
EMV	Europay, Mastercard and Visa
ISO	Independent Sales Organization
POS	Point of Sale
Sub-ISO	Subsidiary Independent Sales Organization

Introduction

At Valor PayTech, we curate innovative solutions for all your business needs. With our top-notch products and solutions, we deliver an exemplary contribution towards leaping your business to greater heights. Valor delivers user-friendly features crafted with meticulous planning and organization to ease business transactions. The fleet card features on our VL500 and VL550 POS terminals is another step forward in creating seamless and efficient payment experiences for merchants and customers in petroleum industry. Our fleet card functionality makes managing fuel transactions easy, enhancing operational efficiency and ensuring customer satisfaction. This document elaborates on the key functionalities of the fleet card feature across Valor platforms.

Objective & scope

This user guide is prepared to provide a detailed explanation of the fleet card feature to users. It will briefly address the prerequisites required for utilizing this feature, the step-by-step procedure for performing fuel transactions, and other effective fleet card functionalities to enhance the end-user's understanding of this feature.

Prerequisites

The Fleet Card Acceptance is an efficient feature designed for ISOs and merchants in the petroleum industry to process fuel-related transactions seamlessly. This feature can be facilitated by the ISOs and merchants through Valor Portal. To utilize this feature, the ISOs and merchants need to have login access to the Valor Portal. The Valor Portal can be accessed by the following link provided:

<https://online.valorpaytech.com/login>

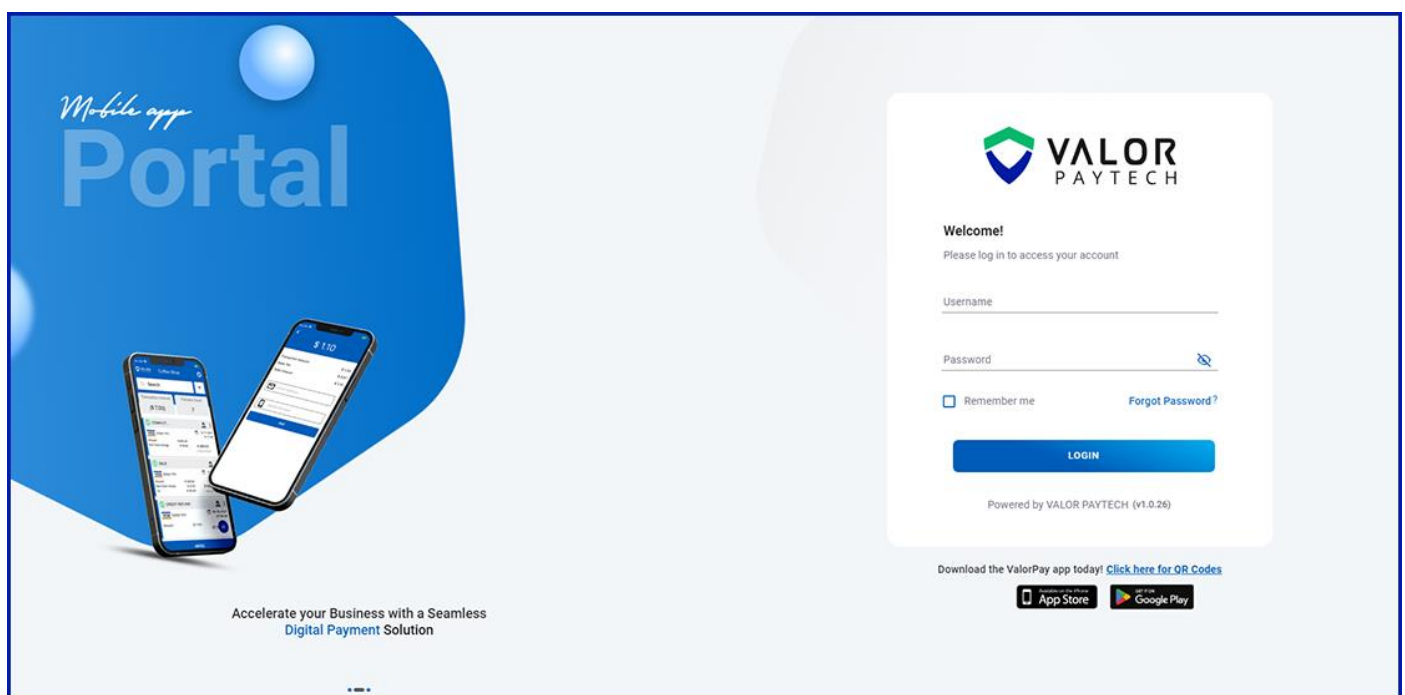


Figure 1: The Online Portal login

Benefits

The fleet card functionality is packed with benefits that enhance the overall transaction experience for businesses in the fuel industry:

- **Product Management:** Fleet cards enable merchants to easily track and manage their fuel and service-related products through the Valor Online Portal. Merchants can efficiently update product details, ensuring smoother operations and preventing lost sales opportunities.

- **Customization and Flexibility:** Merchants can customize their offerings through the Valor Portal, ensuring that only specific products or services are available for fleet card purchases. This gives merchants greater control over which products are linked to the fleet card, improving customer experience, and maintaining more accurate records.
- **Speed Up Transactions:** Instead of scrolling through product lists, merchants can simply enter the product code on the POS device to instantly add items. This streamlined process allows for faster transactions, reducing wait times and enhancing overall customer satisfaction.
- **Enhanced Customer Loyalty:** By offering fleet cards, merchants can enhance their relationships with fleet operators, providing a simple and reliable payment option for regular customers. This improves customer loyalty and encourages repeat business, driving long-term revenue growth.

Getting started

Portal functionalities in Fleet Card

The Valor Portal provides merchants and ISOs with a backend system to manage fleet card transactions efficiently. Through the Portal, users can configure fuel products, define product categories, and oversee their fleet inventory with ease. The Portal's structures framework allows for streamlined product management, ensuring that all fleet-related transactions align with the merchant's business operations.

Fleet Merchant Onboarding in the Valor Portal

1. Login to the Valor Portal

The ISOs must enter their respective credentials on the Valor Portal and the homepage will appear.

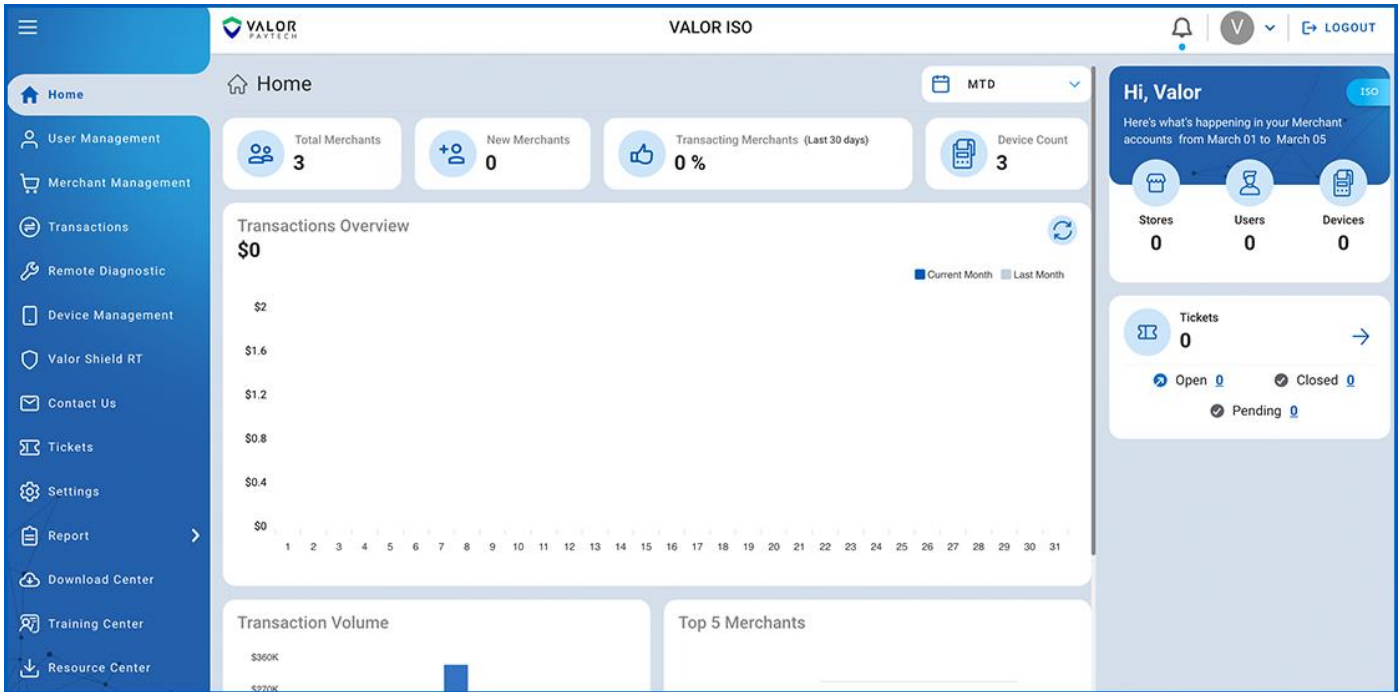


Figure 2: Homepage of the Online Portal

2. Enabling fleet transactions for new Merchants

When onboarding a new fleet Merchant, go to the "Modules" section in the Valor Portal. Here, you'll find an option to enable fleet transactions.

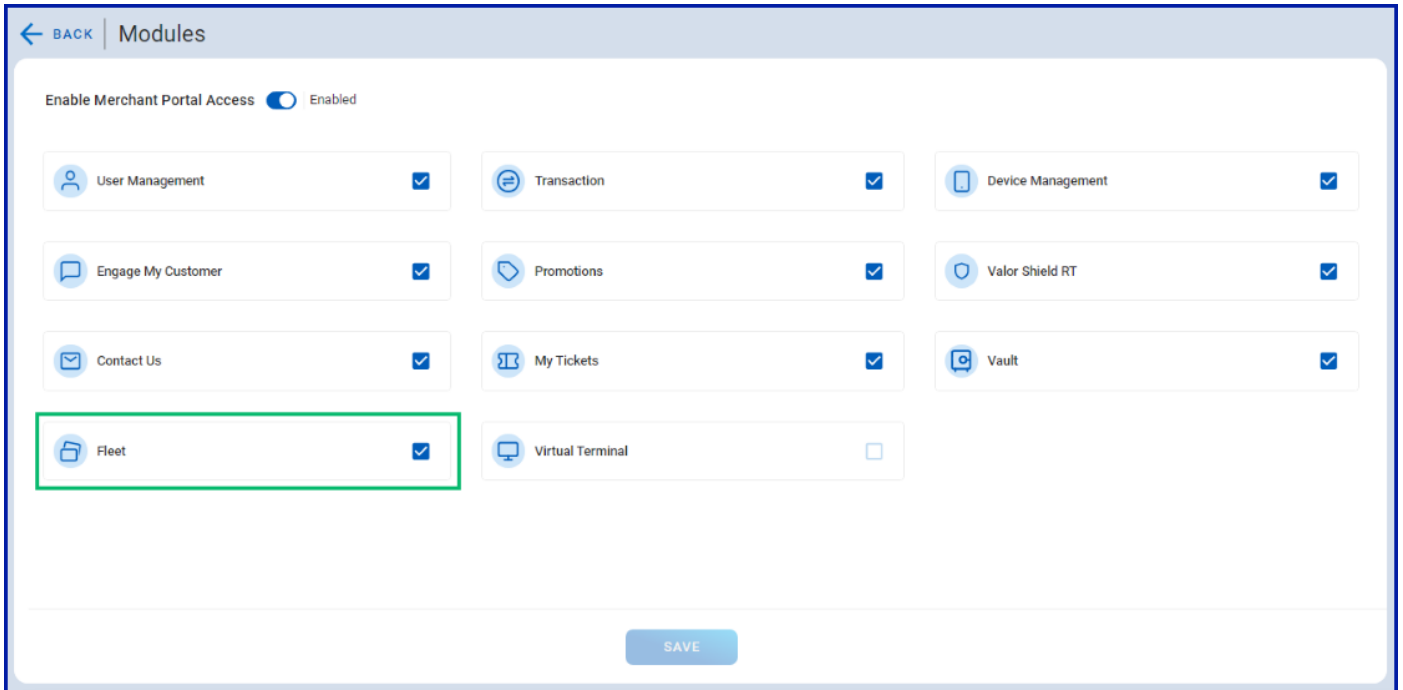


Figure 3: The Online Portal highlighting the Fleet menu option during Merchant onboarding

3. Viewing fleet Merchants in the Valor Portal

To access fleet Merchant details, navigate to "Settings" and select "Fleet". ISOs can view fleet-related products by exploring the Products, Product Types, and Product Categories sections for each merchant. Simply choose the merchant to see the relevant details.

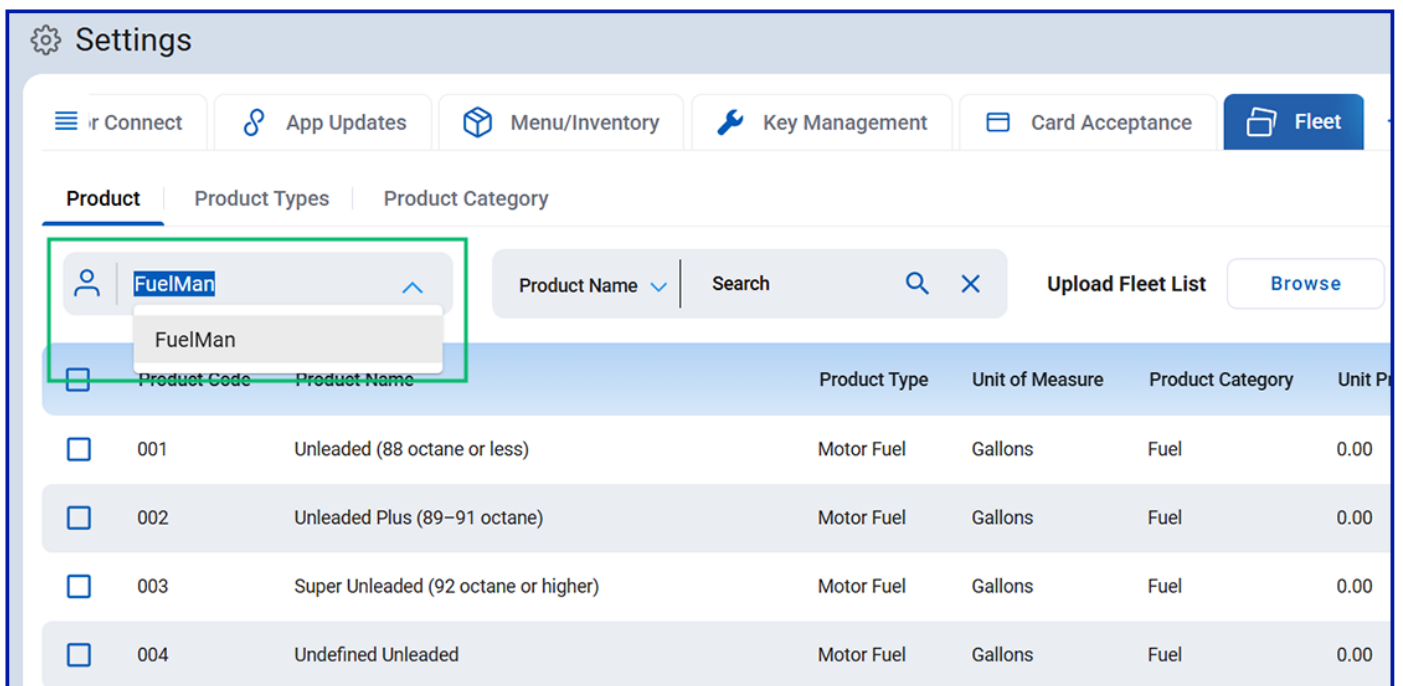


Figure 4: The Online Portal highlighting the merchant details in Fleet menu

Fleet Transactions in the Valor Portal

This section provides step-by-step instructions for using the fleet transactions in Valor Portal.

1. Login to the Valor Portal

The merchants must enter their respective credentials on the Valor Portal and the homepage will appear.

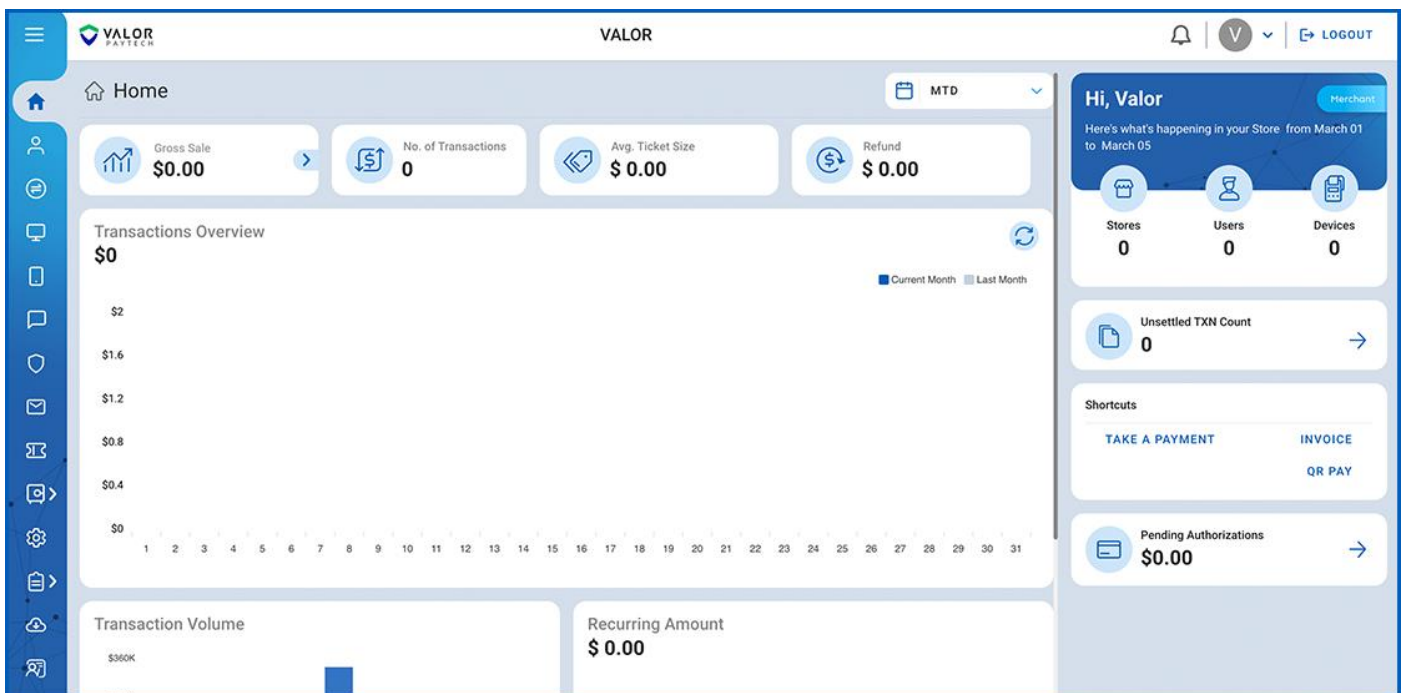


Figure 5: Homepage of the Online Portal

2. Navigate to the “Fleet” Section

In order to access the fleet option in the Valor Portal, the merchant must navigate to the "Settings" option, followed by “Fleet”. Here they can categorize their fleet-related products under the Products, Product Types and Product categories. This helps ensure that each product is correctly classified and makes it easier to retrieve when processing transactions.

Settings

Merchant Settings

Product

Discount

QuickBooks

API Keys

Notification Manager

Fleet

Product

Product Types

Product Category

Product Name

Search

Upload Fleet List

Browse

Action

Product Name	Product Name	Product Type	Unit of Measure	Product Category	Unit Price	Full Service Price	Self Service Price	Status
	Unleaded 87 Octane	Fuel	Gallon	Fuel	\$3.50	\$3.75	\$3.40	✓
	Unleaded Plus 89 Octane	Fuel	Gallon	Fuel	\$3.80	\$4.00	\$3.70	✓
☐	103 Super Unleaded 92 Octane	Fuel	Gallon	Fuel	\$4.10	\$4.35	\$4.00	✓
☐	201 Diesel Regular	Fuel	Gallon	Fuel	\$4.20	\$4.45	\$4.10	✓
☐	202 Diesel Premium	Fuel	Gallon	Fuel	\$4.50	\$4.75	\$4.40	✓
☐	301 Engine Oil	Service	Quart	Maintenance	\$6.99	N/A	N/A	✓
☐	302 Windshield Wiper Fluid	Service	Quart	Maintenance	\$3.99	N/A	N/A	✓
☐	303 Tire Pressure Check	Service	Service	Maintenance	\$0.00	Free	Free	✓

Figure 6: The Online Portal highlighting the Product Tab in Fleet Menu

4. Click "Edit" to Change the Product Information

If there are any changes to existing products, the merchant can easily edit the information by clicking on the vertical ellipses. Whether it is adjusting prices or updating product details, this flexibility ensures the inventory is always accurate.

Settings

Merchant Settings Product Discount QuickBooks API Keys Notification Manager **Fleet**

Product Product Types Product Category

Product Name Search Upload Fleet List Browse Action

☐	Product Code	Product Name	Product Type	Unit of Measure	Product Category	Unit Price	Full Service Price	Self Service Price	Status
☐	101	Unleaded 87 Octane	Fuel	Gallon	Fuel	\$3.50	\$3.75	\$3.40	
☐	102	Unleaded Plus 89 Octane	Fuel	Gallon	Fuel	\$3.80	\$4.00	\$3.70	
☐	103	Super Unleaded 92 Octane	Fuel	Gallon	Fuel	\$4.10	\$4.35	\$4.00	
☐	201	Diesel Regular	Fuel	Gallon	Fuel	\$4.20	\$4.45	\$4.10	
☐	202	Diesel Premium	Fuel	Gallon	Fuel	\$4.50	\$4.75	\$4.40	
☐	301	Engine Oil	Service	Quart	Maintenance	\$6.99	N/A	N/A	
☐	302	Windshield Wiper Fluid	Service	Quart	Maintenance	\$3.99	N/A	N/A	
☐	303	Tire Pressure Check	Service	Service	Maintenance	\$0.00	Free	Free	

Figure 7: The Online Portal highlighting “edit” option in the vertical ellipses

Settings

Merchant Settings Product Discount QuickBooks API Keys Notification Manager **Fleet**

Product Product Types Product Category

Product Name Search Action

Edit Your Item

Product Code* 001 Product Name* Unleaded (88 octane or less)

Product Category* Fuel Product Types* Motor Fuel Unit Gallons

Full Service Price \$ 0.000 Self Service Price \$ 0.000 Status* Active

CANCEL UPDATE

☐	Product Code	Product Name	Product Type	Unit of Measure	Product Category	Unit Price	Full Service Price	Self Service Price	Status
☐	101	Unleaded 87 Octane	Fuel	Gallon	Fuel	\$3.50	\$3.75	\$3.40	
☐	102	Unleaded Plus 89 Octane	Fuel	Gallon	Fuel	\$3.80	\$4.00	\$3.70	
☐	103	Super Unleaded 92 Octane	Fuel	Gallon	Fuel	\$4.10	\$4.35	\$4.00	
☐	201	Diesel Regular	Fuel	Gallon	Fuel	\$4.20	\$4.45	\$4.10	
☐	202	Diesel Premium	Fuel	Gallon	Fuel	\$4.50	\$4.75	\$4.40	
☐	301	Engine Oil	Service	Quart	Maintenance	\$6.99	N/A	N/A	
☐	302	Windshield Wiper Fluid	Service	Quart	Maintenance	\$3.99	N/A	N/A	
☐	303	Tire Pressure Check	Service	Service	Maintenance	\$0.00	Free	Free	

Figure 8: The Online Portal displaying the product editing option

POS functionalities in Fleet Card

Fleet Card is an exclusive feature available for payments processed via POS terminals. As mentioned earlier, this feature allows the merchants to process fuel-related transactions within the POS terminal. Merchants can effortlessly navigate the VL500 and VL550 POS interface, select fuel types, verify vehicle details, and complete transactions with minimal effort.

Performing fleet transactions with POS terminals

This section elaborates on the process of completing a fuel transaction with the POS terminal.

1. Select Fuel Type

To initiate a fleet card transaction, the user taps the "Fuel" icon on the POS terminal. This action prompts to choose the type of fuel the customer wishes to purchase. The available fuel types depend on the products configured in the Valor Online Portal, so it is important for the user to keep this information updated to ensure accurate pricing and selection.



Figure 9: POS terminal displaying Fleet inventory

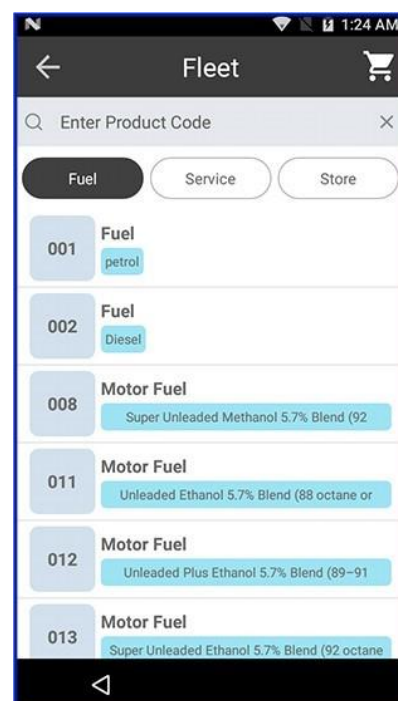


Figure 10: POS listing the product code

2. Select Product or Service

After selecting the fuel type, the user may need to choose additional products or services based on the customer's request. This could include vehicle maintenance services or in-store items. The user should tap the "Service" or "Store" option and select the appropriate service or product. This can also be done by typing the product code at the search bar.

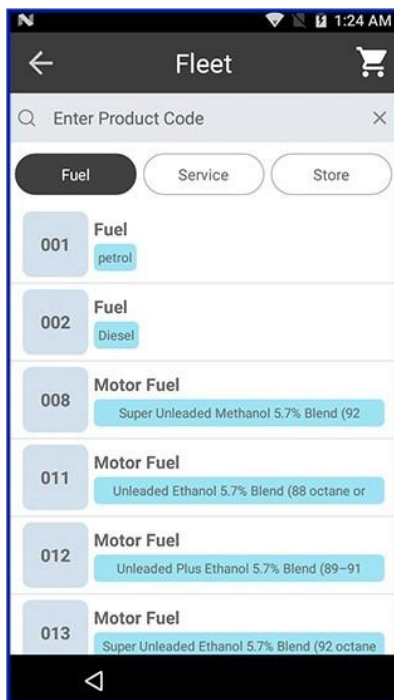


Figure 11: POS listing the product code

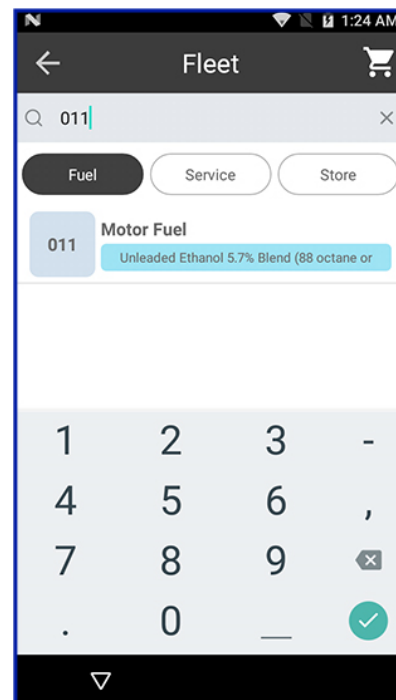


Figure 22: Selecting a product in Fleet inventory

3. Enter Transaction Details

Next, the user should enter the transaction details, including product quantities, pricing, and any applicable discounts or promotions. The POS terminal displays a summary of the transaction for review. It is crucial for the user to confirm that all details are accurate before proceeding.

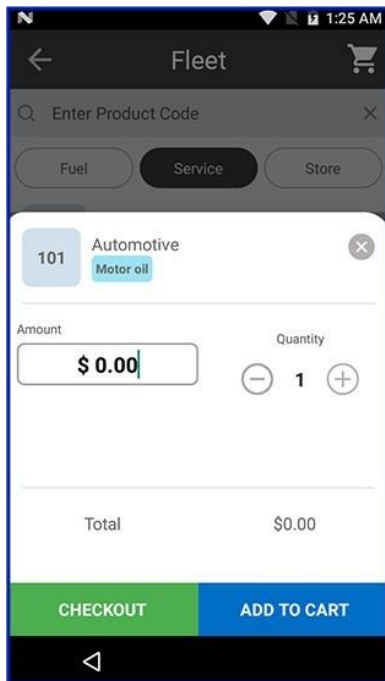


Figure 13: Adding quantity and price of items

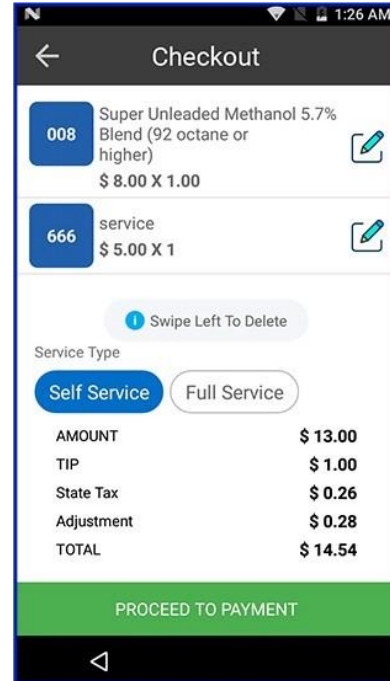


Figure 14: Final checkout screen

4. Vehicle Verification

To complete the transaction, the POS terminal verifies the vehicle's information, such as the odometer reading, Vehicle ID, driver number, and user ID. This verification step helps ensure that the transaction is linked to the correct vehicle and that payment is processed accurately. If there are any discrepancies, the terminal prompts the user for adjustments.

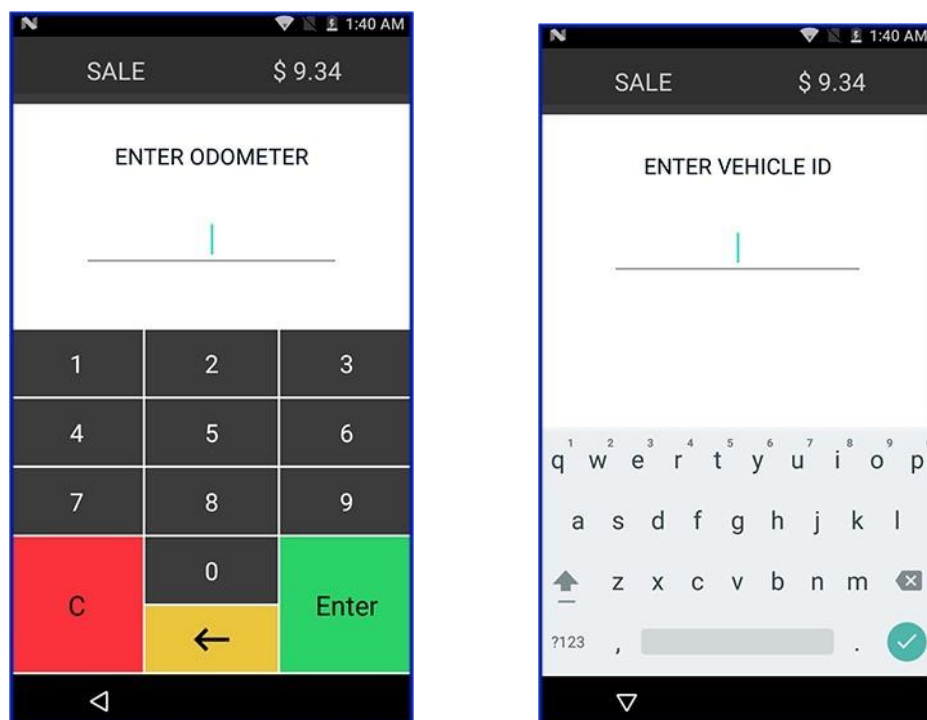


Figure 15: POS terminals verifying Odometer and Vehicle ID

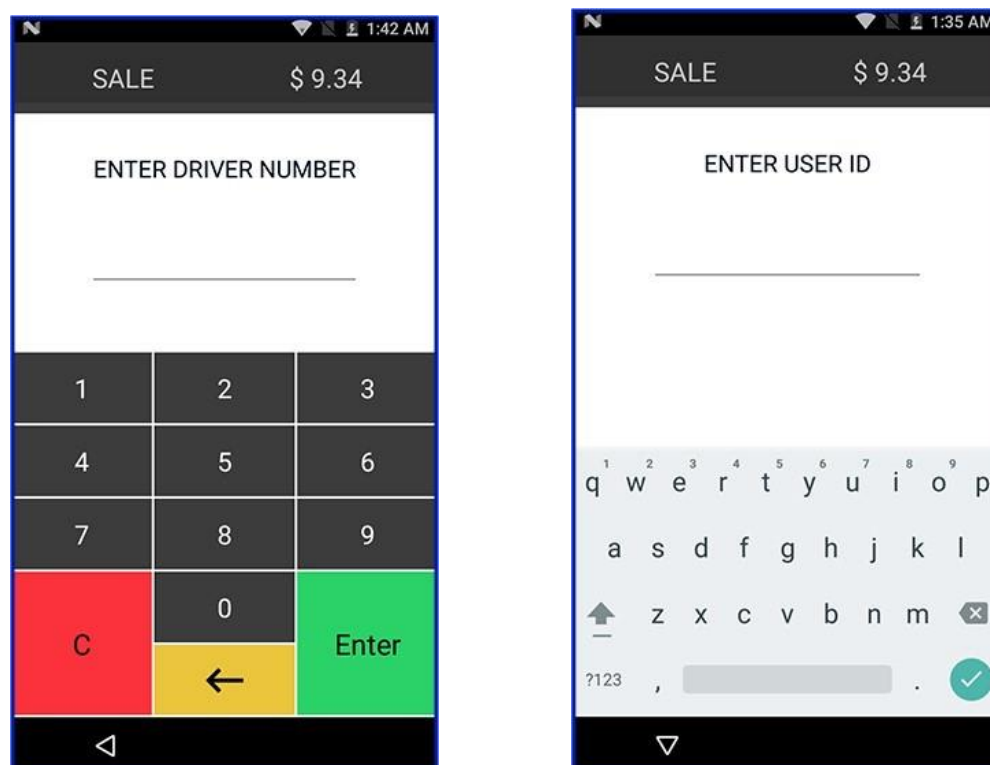


Figure 16: POS terminals verifying details before checkout

5. Complete Payment

After verifying all transaction details, the user proceeds to process the payment. The fleet card is charged for the selected fuel, products, and services, thereby completing the transaction through the POS terminal.

FleetMerchantNew123
Chennai
Astoria NY 11106
999.999.9999

02/27/2025 05:23

Fleet Sale

Trans:2	Batch:2
VISAFLEET	SWIPE
*****2226	**/**

AMOUNT :	\$ 102.00
State Tax	\$ 4.00
SUB TOTAL:	\$ 106.00

TIP: _____

TOTAL: _____

Resp:	APPROVED
Code:	732630
Ref#:	505805308635
Odometer:	123456
Vehicle Id:	123456

Item	Amount (\$)
Unleaded (88 octane or ie	100.00

15% ☐

Tip: \$ 15.00

Tot: \$ 121.00

20% ☐

Tip: \$ 20.00

Tot: \$ 126.00

22% ☐

Tip: \$ 22.00

Tot: \$ 128.00

25% ☐

Tip: \$ 25.00

Tot: \$ 131.00

Cardholder acknowledges receipt of goods and obligations set forth by the cardholder's agreement with issuer.



X _____

VISA FLEET/IRACK 1 AND 2

MERCHANT COPY
Thank You
Powered By ValorPay (V3.0.17E)

Figure 17: Receipt generated for fleet transactions

Conclusion & Contact Details

As we conclude our user guide, we are committed to creating a positive impact in delivering precision and perfection across all Valor platforms. This exclusive feature of fleet card is carefully curated to deliver exemplary performance for all our users. We believe that this user guide serves as an indispensable source for your regular operations, and we are delighted to be a vital stakeholder in your business. We are immensely grateful for your encouragement and look forward to unwavering support.

At Valor, we are extremely glad to assist you with your questions and queries. Please e-mail us at sales@valorpaytech.com or dial 1.800.615.8755. to contact our support team. Make sure to visit www.valorpaytech.com/kb for additional resources on Valor products and solutions. We anticipate your unwavering support for all our future endeavours and wish to remain a loyal partner in your business, leading towards a successful journey in your business.

Version History

Document Name	Version	Date (MM/DD/YYYY)
Valor Fleet Card User Guide 2025	1.0	03/27/2025



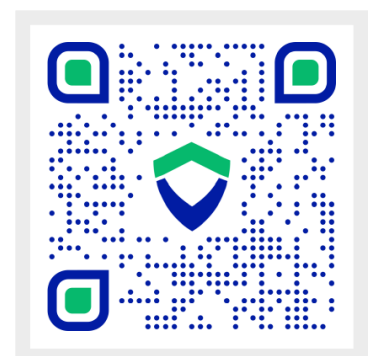
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