FOCUS

by TELUS®

USER GUIDE

FOCUS FLEET

AND FUEL MANAGEMENT

V1.5 (June 2023)

https://app.focusoptimization.com

FOCUS by TELUS

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LOGIN AND INITIAL CONFIGURATION

Welcome to the FOCUS platform!

Focus management would like to emphasize that while this guide is intended to be as exhaustive as possible, it is not a substitute for a training session complete with explanations from our training team. It is intended as a first line of assistance and as a reference guide to be used following the initial training session.

An internet connection is necessary for accessing the FOCUS portal. The FOCUS web application is optimized for Chrome, Firefox, Edge, and Safari browsers, and is thus accessible via any device equipped with these applications. In the search bar, type:

app.focusoptimization.com

This link will permit you to access the application's landing page:
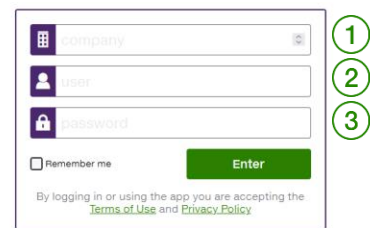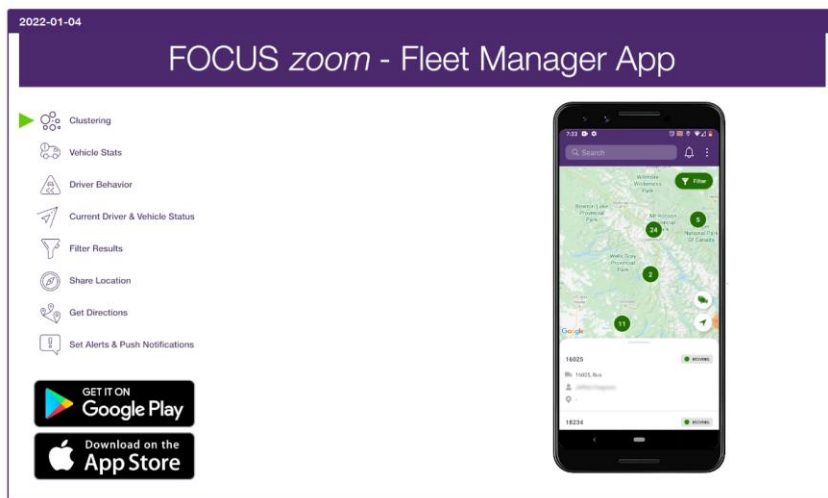
Type your company number in the field 🔳 (company) ①. This number is assigned to you by FOCUS and is unique to your organization.

Type your username in the field 👤 (user) ②

Type your password in the field 🔒 (password) ③.

Then click "ENTER" to access your Fuel page.

This guide is intended for clients who have both fleet management and fuel management. If you have only fuel management, please use the guide called "User Guide FOCUS FUEL".

Our "FOCUS FUEL Mobile" product works exactly like fixed (stationary) fuel tanks. You can therefore use this guide to assist you in using it.

For any information related to fleet management, refer to the "FOCUS User Guide".

Before you begin to use FOCUS Fuel, several steps are necessary to ensure proper system configuration.

Those steps are the following:

1- Create the vehicles and link a fob to each.

2- Create the employees and link an identification key to each.

3- Give employees and vehicles access to the pump(s).

4- Enter the parameters of the fuel tank(s).

We will examine these steps in greater detail.

EQUIPMENT CREATION

Clicking the [ÉQUIP.] icon displays the following page:

The leftmost section ①　itemizes the list of vehicles saved in FOCUS. To display the details of a given vehicle, click on the unit number in the left column. The information will display then in the middle part of the screen ②. You can then enter missing information by filling out the following fields:

- The section called "Personalized information" ③　permits the addition of fields specific to each organization. In such a case, the fields in question are added before initiation of service.

- The section called "Contract information" ④　includes information associated with the equipment acquisition contract. This section is optional.

- The Fuel tank Capacity ⑤　field can be very useful in preventing two fills with the same identifier. This field is related to fuel management. Enter the maximum number of litres that the fuel tank can hold and when filling, Focus fuel will automatically stop once it has reached that reading.

- The Current information section ⑥ indicates the current mileage of the vehicle and/or the number of hours the motor has been in operation. Generally, only one of these fields is filled out. Mileage generally suffices for vehicles, and hours in operation for machinery.
- Fill out the fields needed, however only the name and ID fob are required. Once saved, create the other vehicles that will use FOCUS fuel.

Below are further details on linking a fob with a vehicle.

LINKING A VEHICLE FOB

To link a fob to a vehicle, you must click on the pen icon on the line "**Identification Key**"

A list of the available fobs will be displayed. Select the fob that will be installed in the vehicle. It is very important to keep a list of the linked vehicles/fobs for physical installation in the vehicles.

Once selected, click on "**Save**".

EMPLOYEE CREATION

Click on the OPTIONS tab, and select the "**Employees**" option from the displayed drop-down menu.

The following page appears.

In order to create an employee, click on the "+" button and fill out the pertinent fields of the Employee management section – New ①.

The Name ② and Identification key ④ are the only required fields.

ID	SECTION/COLUMN	DESCRIPTION
②	Name	Enter the employee's name. This field is required.
③	Team, responsibility	You can enter any relevant information here.
④	Identification key	Select the fob that will be given to the employee. This section is important.
⑤	Save	Save your new employee.
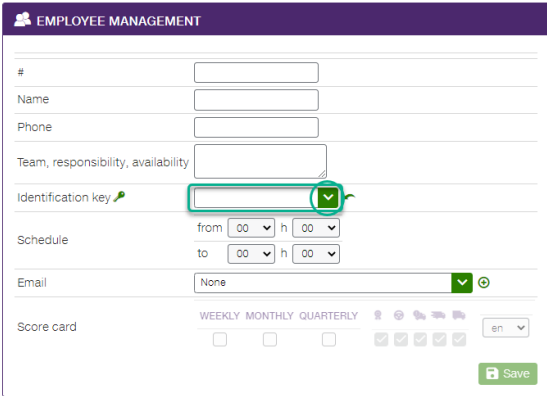
Once the first is saved, create all of the other employees who will use Focus fuel.
Below are further details on linking fobs with employees.
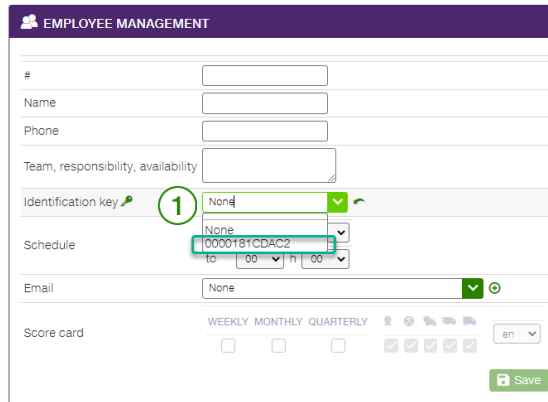
LINKING AN EMPLOYEE FOB

To link a Fob to an employee, you must select one from the drop-down menu: "**Identification Key**".

A list of the available fobs will be displayed. Select the fob that will be given to the employee. It is very important to keep a list of the linked employees/fobs for the physical transfer of fobs to employees.

If you know the fob number that you want to link, you can type the first few digits in the field ①.

Once you have selected the fob, click on "**Save**".

FOCUS by TELUS

Setting configuration for the pump(s) is essential before you are able to begin use. Start by selecting the Fuel dashboard. ①
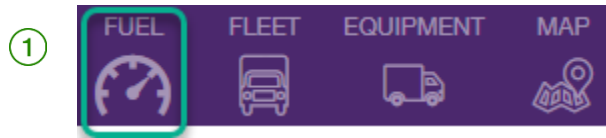
Whether you have a single or multiple tanks, the procedure remains the same. Click on the 🔧 button which brings up the specific pump parameters.
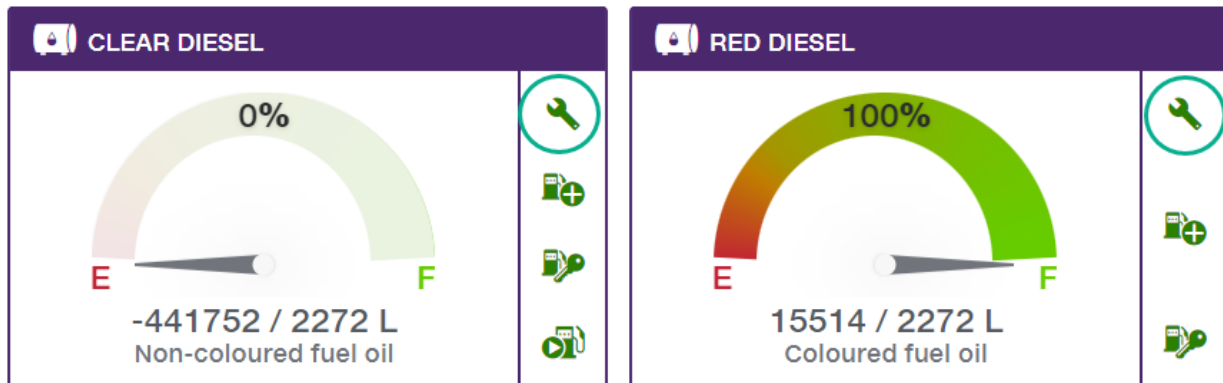
Let's examine in more detail: FUEL TANK CONFIGURATION

ID	SECTION/COLUMN	DESCRIPTION
1	Name	Give the name to the pump that you typically use.
2	Type	It is important to specify the type of fuel or liquid that the pump emits. Multiple options are available.
3	Maximum level	Here you must specify the fuel tank's total capacity. This information is important in order to establish the fuel tank's virtual level.
4	Current level	Displays the approximate level of the fuel tank. It must be mentioned that no sensor or gauge is installed in the fuel tank. The estimated level is derived from the maximum capacity, minus the fills removed.
5	Alert threshold	You can schedule an alert for low fuel level. The value entered here represents the limit below which an alert will be triggered.
6	Email	You can add an email address to the low fuel level alert. Frequently, the buyer or fuel provider would be the recipients.
7	Recent Transactions	Shows the last 10 transactions for the selected pump.
8	Save	Once the information has been entered or modifications are complete, click Save.

ACCESS TO PUMP USE

The final step, and the most important, is to give pump access to various vehicles and employees.

Click on the pump with key icon
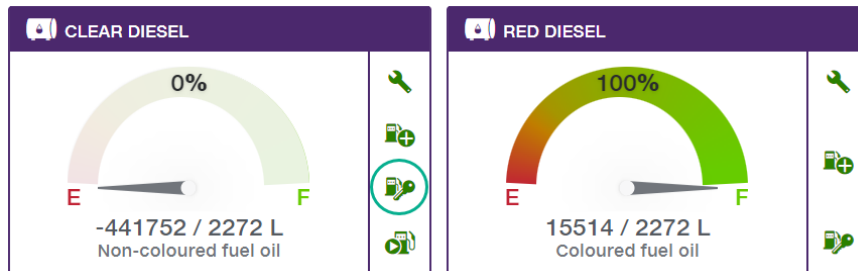
The access configuration page will be displayed.
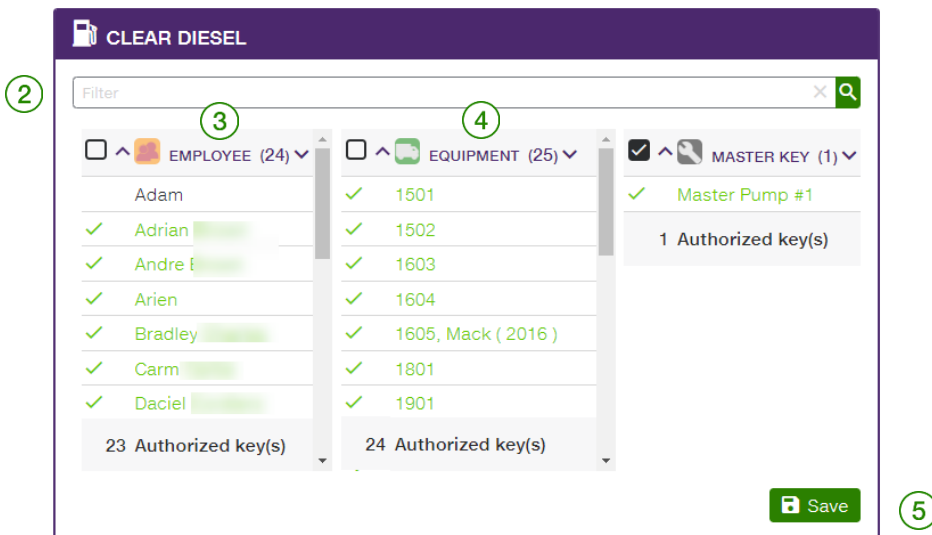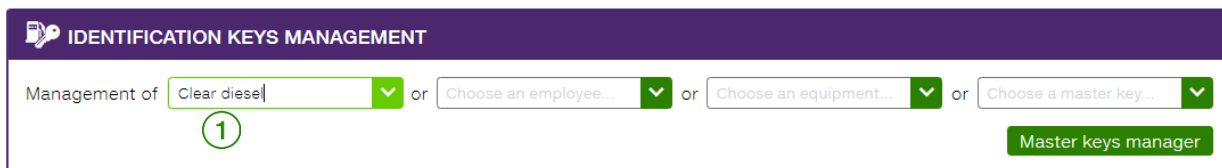
The upper section permits you to select which pump you want to manage access for ①.

The "Filter" field allows you to search in either the employees or equipment columns ②.

The two columns Employee ③ and Equipment ④ are the core of the system. This is where authorization is given to an employee or piece of equipment to use a specific pump. In selecting an employee or piece of equipment, you authorize their use of the pump in question. You can accordingly prevent use of a diesel pump for a gas vehicle. Once finished, click on the Save button ⑤.

Congratulations! Your initial configuration of FOCUS Fuel is finished!

USING FOCUS FUEL

Generally, and subject to your configuration, when using FOCUS fuel, you will have to present the employee and the vehicle fob. A sound will be emitted by the main panel. Here is the significance of the sounds emitted:

- 3 short beeps: master key recognized and accepted
- 2 short beeps: vehicle fob recognized and accepted
- 1 short beep1: employee fob recognized and accepted
- 1 long beep: employee or vehicle fob not linked and thus not accepted
- No sound when presenting either of the two fobs: fob or identifier defective

OFFICIAL GUIDE

FUEL TAB

The **Fuel** tab of the FOCUS platform acts as a **fuel** dashboard.

This page offers an overview of the information associated with the most recent transactions as well as the statuses of each fuel tank. The upper bar on the page shows the following information:

(1) **FOCUS USER –** Identifies the user logged in to FOCUS.

(2) **COMPANY NAME –** Identifies the name of the company and the unique company number assigned by FOCUS.

(3) **EQUIPMENTS FILTER –** Displays the vehicles associated to a predefined group. The option "All equipment" is selected by default. To access a different group in the dashboard, click on the drop-down menu and select the desired group from the drop-down menu.

(4) **TIME –** Indicates the time of the last update of the fleet page (according to the time zone selected by default). The time may occasionally flash white momentarily to indicate that the Fleet page is updating.

(5) **LANGUAGE –** Permits the user to display the FOCUS platform in English or French. To change the language, click on button showing the current language, and select the desired option from the drop-down menu.

(6) **LOG OUT –** Permits the user to leave the FOCUS platform.
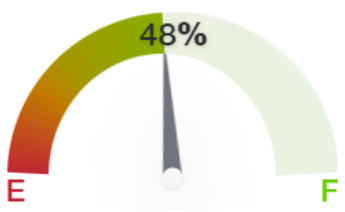
① AVERAGE VALUE: General information of a financial nature is displayed here.

② RECENT TRANSACTIONS: The most recent fills are displayed here.

③ PUMP STATUS: The status of each pump is displayed here.

Let's examine each section in detail.

① **AVERAGE VALUE**

The average value is for the current day. Focus displays the average price as well as the price of the last fuel purchase as long as the relevant amounts are entered when the fuel is added. The total expense is thus available, as well as the total quantity, per day.

② **RECENT TRANSACTIONS**

①

This section shows all of the transactions of recent days. All of the information related to each refill is displayed on each line.

It is possible that one of your vehicles uses a fuel provider other than your own fuel tank, such as a commercial gas station. Gas refills completed externally must be entered manually into Focus in order for the reports to accurately represent the actual status. The button "Third Party Fill" ① serves for this type of data entry.

When that button is clicked, the following page is displayed:

Normally, a purchase receipt is emitted at the time of transaction. Thus, it is easy to fill in the various fields. Once they are filled in, simply click on "Add".

③ **PUMP STATUS**
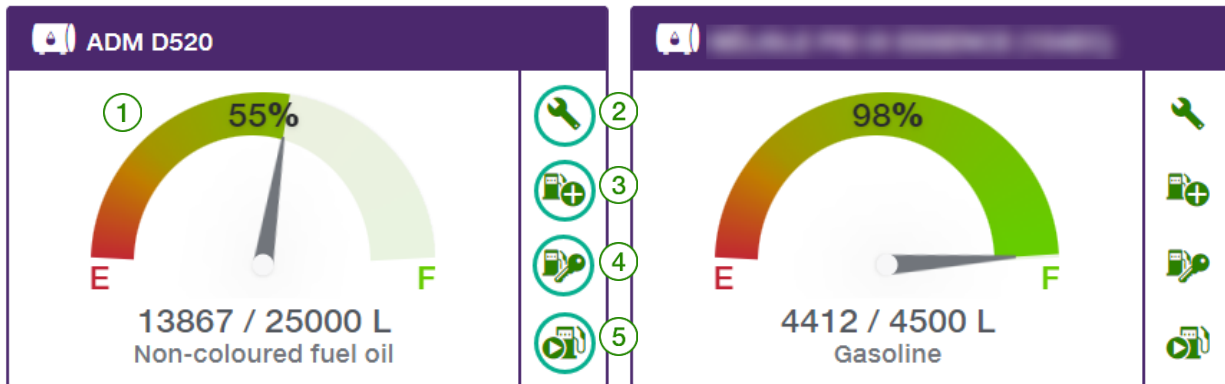
Whether you have a single or multiple fuel tanks, the functionality is always the same. The indicator shows

the **virtual level** of the tank ①.

The first button serves for configuring the fuel tank ②. See "FUEL TANK CONFIGURATION" for details.

ADD FUEL. As no gauge or sensor is installed in the fuel tank, you must accordingly enter each fill completed by your fuel provider. The way to enter these into the system is to use the "ADD FUEL" button

③. When this button is selected, the following window will display:

ID	SECTION/COLUMN	DESCRIPTION
1	Fuel tank	This is the selected fuel tank to which you are adding fuel.
2	Date	Fill date.
3	Provider	Name of the fuel provider. It is possible to create a new one by clicking the "+" button.
4	# Invoice	This is an optional field. You can enter the delivery order number here for instance.
5	"$"	This field is optional. If you have the total amount of the fill, enter it into the system.
6	Nb.	This field is required. It is here you enter the number of litres that were delivered. This quantity will be added to the fuel tank's current level.
7	Add	Once all of the information is entered, click on "Add".

To note:

- You can add more providers by clicking the ⊕ button.
- It is highly likely that you will not have the total amount at the time you are entering your fuel addition information. Once you have the official invoice with the total amount, create a new add fuel entry, this time leaving the number of litres at 0.
- If you make a mistake in entering the details of an addition of fuel and you click on "ADD", it is not possible to return or modify the entry. You must create a new add fuel entry, with the category of "ADJUSTMENT" or "MODIFICATION", and enter the number of litres as a negative number in order to obtain the correct number of total litres.
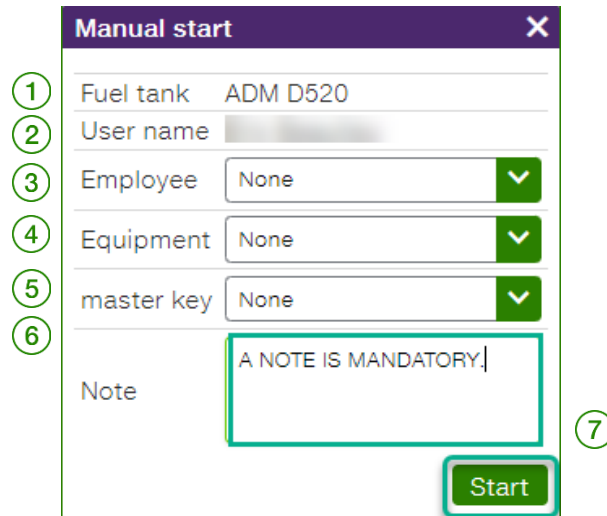
IDENTIFICATION KEY MANAGEMENT. As Focus fuel works with double identification, employee and vehicle, it is here that permissions are granted ④. Refer to the section "ACCESS TO PUMP USE" for more details.

MANUAL START. It is possible that specific situations arise requiring you to start the pump remotely, for instance for an employee who does not have their fob, or for a piece of equipment that is not equipped with a vehicle fob. It is possible to remotely start a pump ⑤.

When this button is selected, the following window will display:

ID	SECTION/COLUMN	DESCRIPTION
1	Fuel Tank	This is the selected fuel tank that you want to start remotely.
2	User name	Here the name of the user currently connected to Focus, who wants to start the pump, is displayed.
3	Employee	This field is optional. It allows you to write an employee's name.
4	Equipment	This field is optional. You can designate the vehicle that will receive the fuel.
5	Master key	This field is optional. Do not select a master key.
6	Note	This field is required. This is where you enter all information relative to the manual start. This information will show in the reports.
7	Start	Once all of the information has been entered click "Start".

You may optionally identify the employee or the equipment. Information about the master key is not required.

You must however write a note. Include as many details as possible in order to facilitate the future identification of this transaction. Once ready, click on "START".

To note:

- It may take up to 2 minutes for after initiating the remote start in order for the pump to receive the manual start signal.
- The inactivity timeout of 60 seconds applies at all times, even after a manual start.

FLEET TAB

In the Fleet tab, a section is reserved for fuel information and functionnality.

The way this works is exactly the same as explained above. The shortcuts are the same, as well as their functionalities.
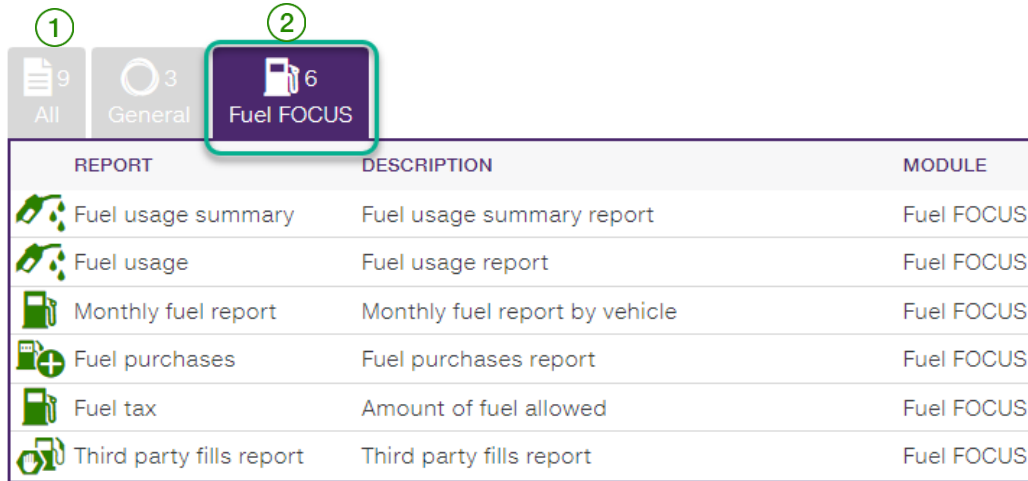
For more details on the rest of the information contained in the Fleet tab, consult our FOCUS user guide, which is available in the help section.

REPORT TAB

ACCESSING REPORTS

This section aims to provide a general overview of reports and provides a basic level of detail. For more detail, please contact our customer service team.

Selection of the [REPORT] tab displays the following page:

The report tab has multiple sections. The first contains all of the reports, the second contains only general reports ① and one is allocated specifically to fuel ②.

Click on the desired report to display detailed information.

General parameters of reports:
- All reports are printable or exportable in CSV format in order to permit modification in Excel.
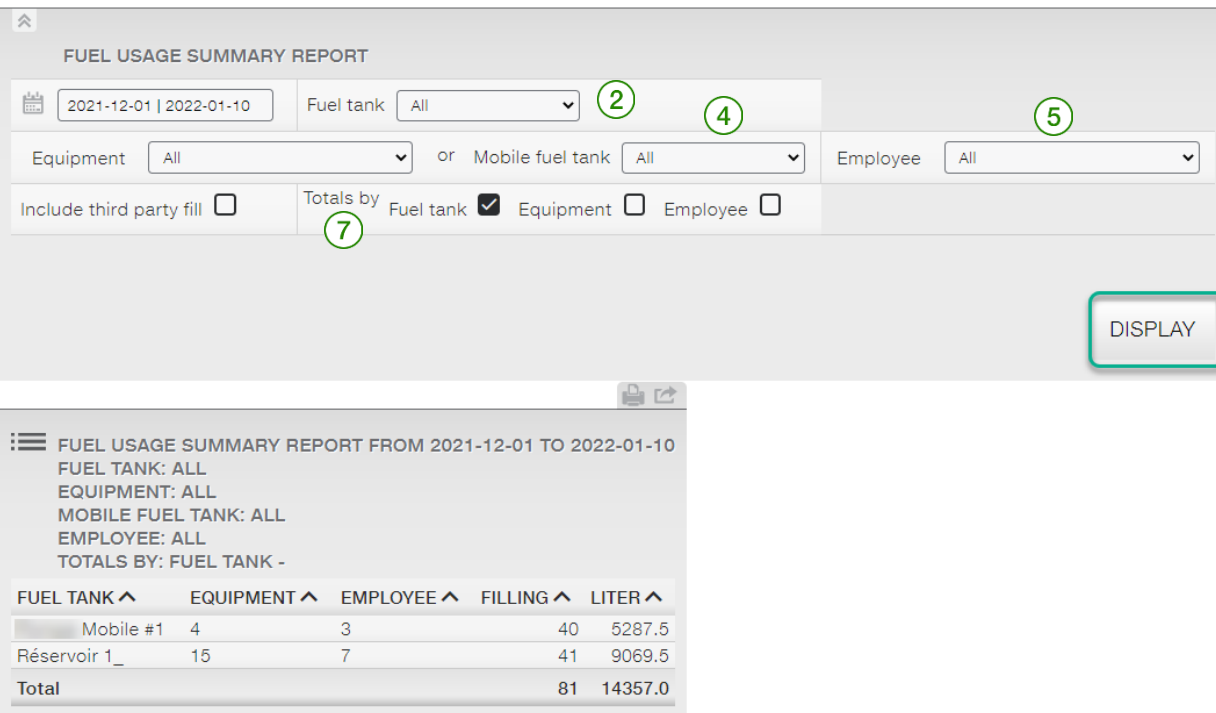

- Reports are available for variable periods, depending on the volume of information. Some reports cover a period of 365 days, other cover a single day.

- It is possible to define periods selecting specific hours.

FUEL USAGE SUMMARY REPORT

Purpose of the report: To display the summary of all fuel transactions, by pump.

Multiple options are available.

ID	SECTION/COLUMN	DESCRIPTION
1	Period	A period for the search
2	fuel tank	Select ALL or a specific tank
3	Equipment	Select ALL or a specific vehicle
4	Mobile Fuel tank	If you have mobile fuel tank, they are selectable here
5	Employee	Select ALL or a specific employee
6	Third party fill	Include or not the external filling
7	Total by	Options for the report's results

The results display in a window that can be printed or exported.

FUEL USAGE

Purpose of the report: To display the details of all of the fills, sorted chronologically.

This report works the same as the preceding one, with the same options, but displays more details per transaction.

MONTHLY FUEL REPORT

Purpose of the report: To display the fills for a one or multiple months, and for one or all of the equipment.

MONTHLY FUEL REPORT

Start date	2021	December
End date	2021	December
Equipment	All	

DISPLAY

MONTHLY FUEL REPORT FROM 2021-12 TO 2021-12 EQUIPMENT ALL

EQUIPMENT ^	MONTH ^	LITER ^
28,	2021-12	242.0
20,	2021-12	751.0
21,	2021-12	210.0
23,	2021-12	285.5
25,	2021-12	414.5
22,	2021-12	415.5
72,	2021-12	49.5
42,	2021-12	2864.0
19,	2021-12	423.0
45,	2021-12	146.5
32,	2021-12	696.0
33,	2021-12	252.5
96,	2021-12	121.0
31,	2021-12	150.0
65,	2021-12	60.0
99,	2021-12	113.0
Total: 16		**7194.0**

FUEL AVERAGE

Purpose of the report: To obtain the average fuel consumption per vehicle. This report is generated based on details of the fills and number of kilometres travelled.

AVERAGE FUEL

Summary ☐ 📅 2021-12-01 | 2021-12-31   Equipment   23,

DISPLAY

AVERAGE FUEL FROM 2021-12-01 TO 2021-12-31 EQUIPMENT: 23,

Filling ^	Attendant ^	Driver ^	km ^	Liter ^	Hours of operation ^	Average consumption(L/100km) ^	(miles/gallon) ^	(L/h) ^
2021-12-16 13:17			413	188	14	45.5	6.6	13.4
1 Period(s)			413	188	14	45.5	6.6	13.4

FUEL PURCHASES

Purpose of the report: To display all fuel purchases for a definite period.

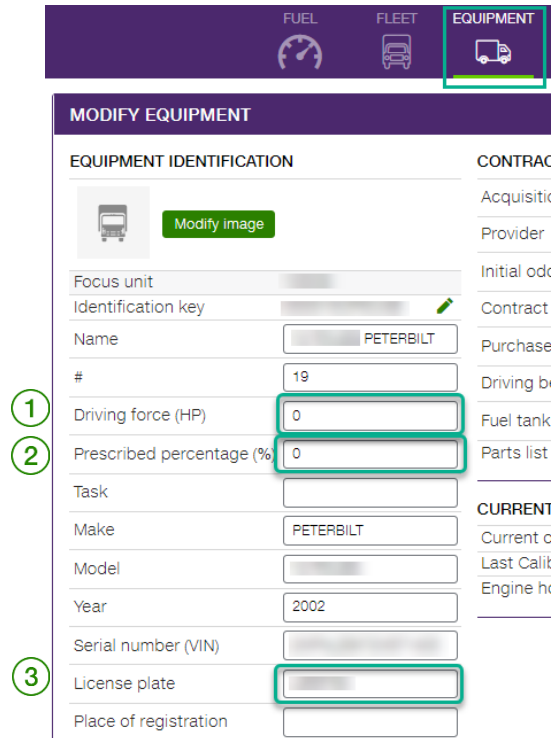| FUEL PURCHASES							
Date		**Fuel tank**		**Provider**			**Display**
2021-12-01 00:00 | 2022-01-11 00:00		All		All			
DATE ∧	**CREATION DATE ∧**	**FUEL TANKS ∧**	**PROVIDER ∧**	**INVOICE ∧**	**$ ∧**	**L ∧**	**$/L ∧**
2021-12-06	2021-12-06 15:09	Réservoir 1_			0.00	2577.00	0.00
2021-12-06	2021-12-06 15:09	Réservoir 1_		AJUST	0.00	41.00	0.00
2021-12-13	2021-12-13 15:02	Réservoir 1_			0.00	3015.00	0.00
ADDITIONS 3					0.00	5633.00	0.00

Select the time period and then click "**Display**".

FUEL TAX

<u>Purpose of the report</u>: To produce the information necessary for completion of the official Quebec provincial tax reimbursement form for fuel only, for heavy equipment having the right to this.

In order to be able to produce this report, it is necessary to have filled out the following fields in the equipment page, for each vehicle subject to the report:

These three pieces of information are mandatory: Driving force (HP) ①, Prescribed percentage (%) ② and the license plate ③. Once this information has been entered into the system, the report can be generated:

QUANTITY OF FUEL USED IN QUÉBEC AND GIVING ENTITLEMENT TO A REFUND
FROM 2021-12-01 TO 2022-01-11

DESCRIPTION OF VEHICLES AND EQUIPMENTS	LICENSE PLATE NUMBER	DESCRIPTION OF WORK REQUIRING OPERATION OF THE EQUIPMENT	ENGINE POWER (IN HP)	NB OF HOURS OR OPERATION	NB OF KM TRAVELLED	QUANTITY USED LITER / NON-COLOURED FUEL OIL	QUANTITY USED LITER/ GASOLINE	PRESCRIBED PERCENTAGE (%)	QUANTITY REFUNDABLE / NON-COLOURED FUEL OIL	QUANTITY REFUNDABLE / GASOLINE
42 PELLE 330DL	VM67718-5			270	0.0	0.0	2864.0	0.0	70	2004.8	0.0
45 PELLE 120JD	VS32576-2			93	0.0	0.0	146.5	0.0	70	102.5	0.0
Total					0.0	0.0	3010.5	0.0		2107.3	0.0

The information contained in this report will help you to fill out the Government of Quebec form.

THIRD PARTY FILL REPORT

Purpose of the report: List all of the fills that were done externally to the tanks managed by FOCUS fuel.

It is possible to search by invoice number or provider name.

ADMIN TAB

USER MANAGEMENT

<u>Purpose</u>: To create and manage FOCUS users.
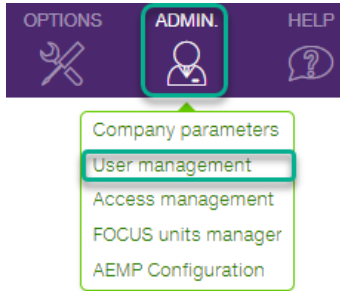
Select the option "**User management**" to display the following page:

Note that many levels of access are conceived principally for fleet management (rather than fuel management). Contact our customer service team for more details.

To create a new account, click ⊕ ②. A new pop-up window will appear with additional details. To edit an existing user, click on the desired user in the list ③. The same pop-up window will appear.

Enter the name to be displayed ④ , a user name ⑤ and a temporary password ⑥ ,

The new user will be able to modify manually at his first connection to the FOCUS platform by using the following rule in the option tab.

- **A lower case letter**
- **An upper case letter**
- **A number**
- **One of the following special characters: !@#$%?&***

> *****It is strongly recommended that the address be a valid email address. *****

If your organization has an SSO (Single Sign On) login system, please refer to your contact person to change your password.

Select the level of access in the drop-down menu of the "Level" field ⑦ .

As required, select an equipment group and/or access group to authorize or limit the user's access to certain functions ⑧ to learn how to create an equipment group, ⑨ refer to the "EQUIPMENT FILTER" section in the Focus user guide.

IMPORTANT NOTE:

- YOU MUST CLICK ON THE SAVE BUTTON TO SAVE YOUR USER CREATION OR MODIFICATION DATA.

Finally, three options are available:
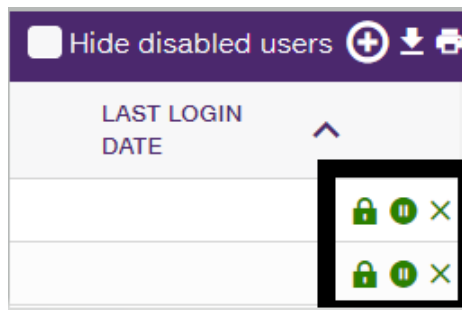
- To change the password, click on the icon 🔒
- To deactivate or reactivate an access click on the icon ⏸
- To permanently delete an access, click on the icon ✕

HELP TAB

FOCUS USER GUIDE

Click on the **HELP** icon, to display the following:

USER GUIDE FOCUS ①

CONTACT US

If you have any questions, comments or suggestions, please contact us at 1-800-670-7220.

Send us a message

Name

Phone

Email address

Questions or comments

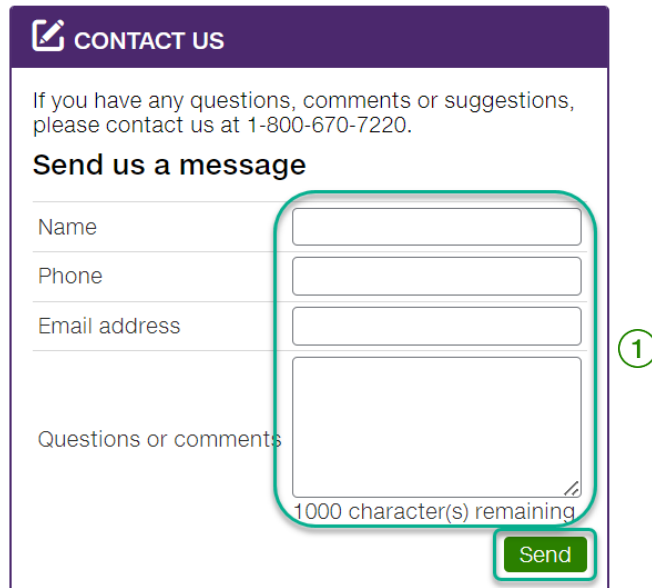1000 character(s) remaining.

Send

Clicking on ① opens another page with the online user guide. The document will remain open as long as that window is open.

CONTACT SECTION

CONTACT US

If you have any questions, comments or suggestions, please contact us at 1-800-670-7220.

Send us a message

Name

Phone

Email address

Questions or comments

1000 character(s) remaining

Send

①

Enter information in the appropriate fields to get in touch with customer service ①.

Once done, click on " Send ".