Making the most of ePlan

Online fleet management at your fingertips

ePlan is LeasePlan USA's one-stop online destination, enabling fleet managers to have on-demand visibility into the key milestones throughout the vehicle and driver journey. ePlan empowers fleet managers to be more productive with:

+ Managing drivers, assets, services, and transactions

+ Accessing critical information and exception reporting

+ Analyzing trends and identifying cost-saving opportunities

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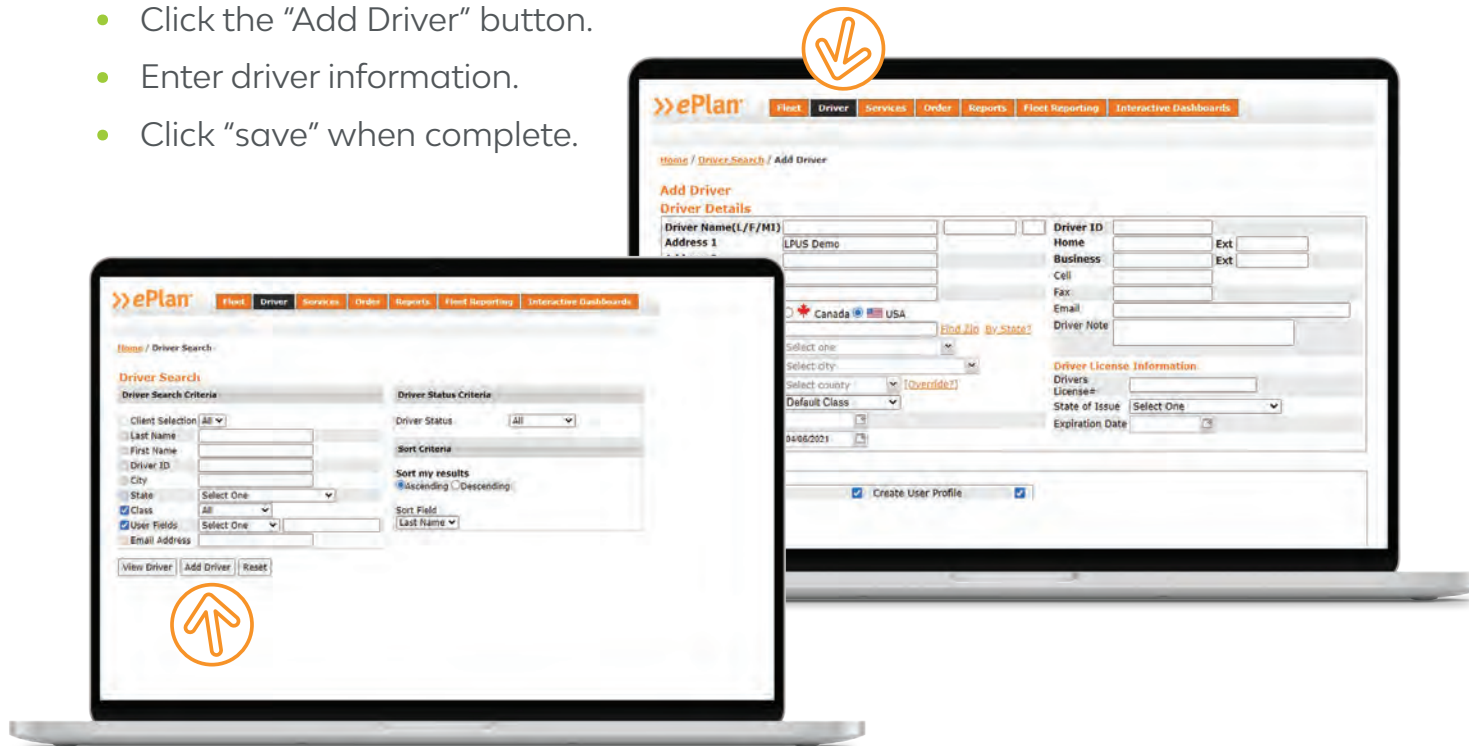Videos more your speed? **WATCH HERE**

╋ Adding a new driver

If you recently had a new driver join your team, it's easy to add them in ePlan in just a few steps.

- From the ePlan homepage, click the "Driver" tab.
- Click the "Add Driver" button.
- Enter driver information.
- Click "save" when complete.

best practices

To prevent duplicate records, always search for a driver first to ensure they are not already in ePlan. If searching by name, remember to check for maiden names, name changes and preferred names.

Always remember to add cell phone numbers and email addresses to ensure drivers can stay up-to-date on key vehicle milestones.

The correct county is very important for vehicle registration purposes. If the prepopulated county is incorrect, be sure to click "override."

expert tips

If you do not have an employee-specific Driver ID, ePlan will generate one.

Be sure to click the check boxes under the driver settings to indicate what your drivers can access in the portal.

➕ Editing a driver

It's important to keep driver information maintained on a regular basis. The correct contact data – address, email and phone number – is vital in ensuring your driver receives important documents and stays informed throughout the vehicle life cycle.

- Search for a driver to edit in the "Driver" tab or find them through Quick Search.
- Select the driver you want to edit.
- Edit driver detail and user fields.

expert tips

If you know the driver's last name or Driver ID, a Quick Search on the homepage is easiest. You can also do partial searches using the first few letters of a first or last name.

Changing the driver class determines what kind of vehicles are available to order. *Only Fleet Managers have access to change this.

# + Changing a driver assignment

If you need to change a driver's vehicle assignment, it's easy to do in ePlan! Accurate vehicle assignments and up-to-date contact information can streamline the driver experience when it comes to vehicle delivery, title and registration, remarketing and more.

2 From the Fleet List, tap the icon on the left to view the vehicle record.
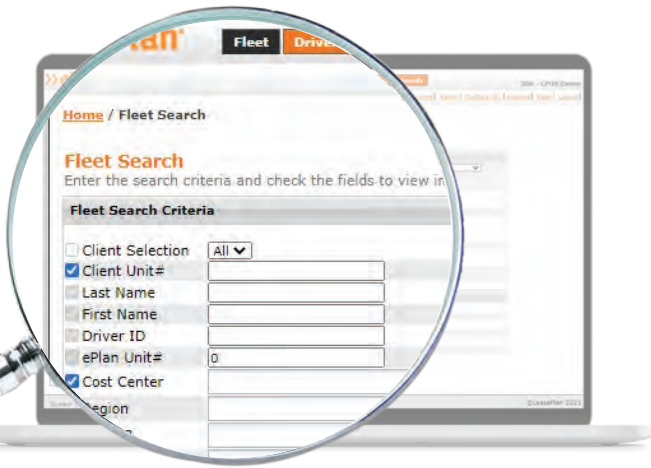
1 In the "Fleet" tab, enter your search criteria to look up a vehicle. Select "View Vehicle."
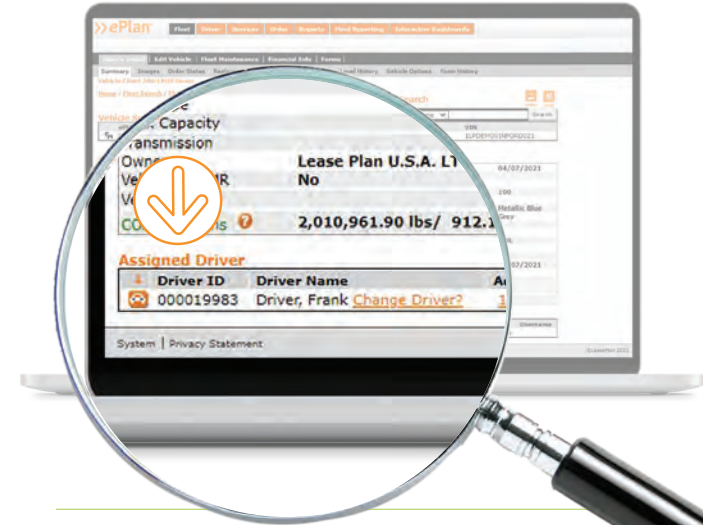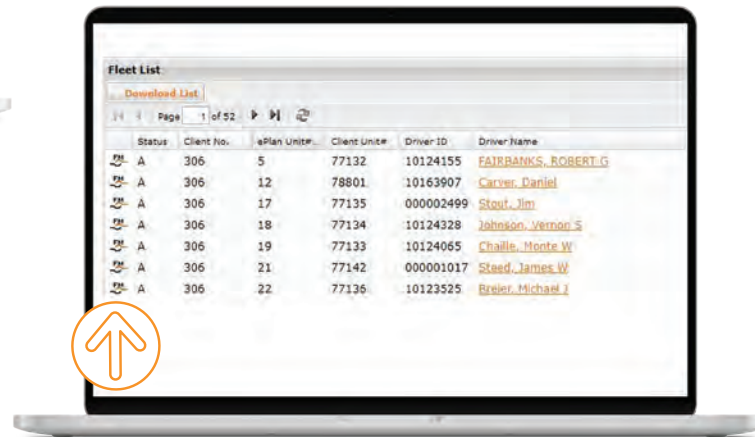
3 In the "Vehicle Detail" tab, scroll down to the "Assigned Driver" section and click "Change Driver."

best practices

Driver IDs are unique to each driver in ePlan and are the best search option to locate a specific individual.

Performing regular audits of driver contact information and vehicle assignments can streamline communications, services and reduce delays throughout the life cycle of your fleet vehicles.
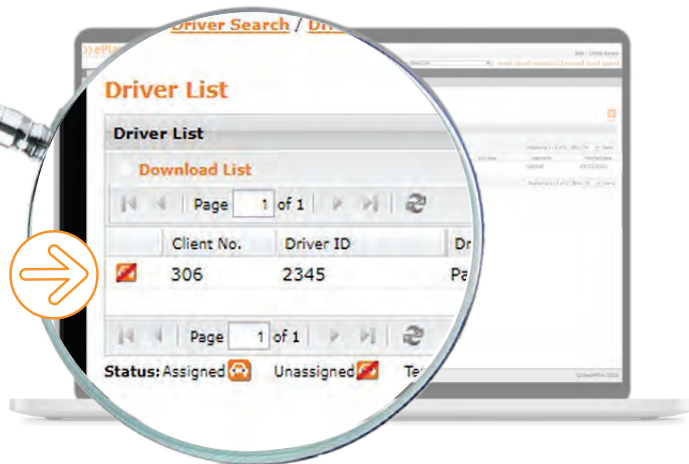
4 From here, simply search for the driver you wish to assign to this vehicle and click "View Driver."

5 Select the driver you will be assigning to the vehicle by clicking the icon on the left.

6 You have the option to terminate the current driver at the same time if needed. Click "Save" and you're done.

keep in mind
If the vehicle is changing states and you are enrolled in our License & Title services, you can initiate a state change during the driver change process.

expert tips
You can also quickly change driver assignment right from Fast-Path Access.
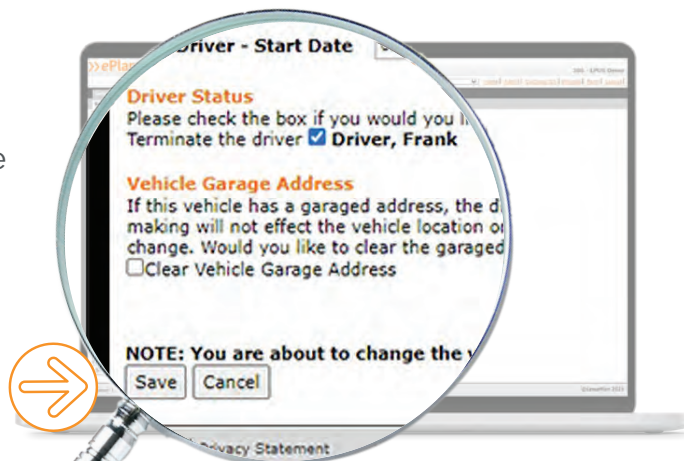
did you know
It is illegal to operate a vehicle primarily in a state it is not registered in.

LeasePlan

+ Terminating a driver

If you ever need to terminate a driver for any reason, it can be done in ePlan in just a few steps. Here's how:

Before you terminate a driver that is assigned to a vehicle, you'll want to reassign the vehicle to a new driver first.

1 In the "Driver" tab, search for the driver you would like to terminate.

2 When your driver is assigned to a vehicle and you wish to terminate them, scroll down to the "Vehicle Assignment" section and click "Change Driver."

best practices

It's a good idea to confirm the driver you are reassigning the vehicle to is already in ePlan prior to the driver change and termination.

Make sure to check the new driver's contact information for updates. This ensures accuracy for future communications and service delivery.

keep in mind

Registration renewals are based on the driver's address in ePlan – or garage address if applicable – so it is crucial to keep the correct drivers assigned to your fleet vehicles and driver contact information up-to-date.

3

Search for the new driver you wish to assign to the vehicle and select the icon on the left to confirm the Selected Driver.
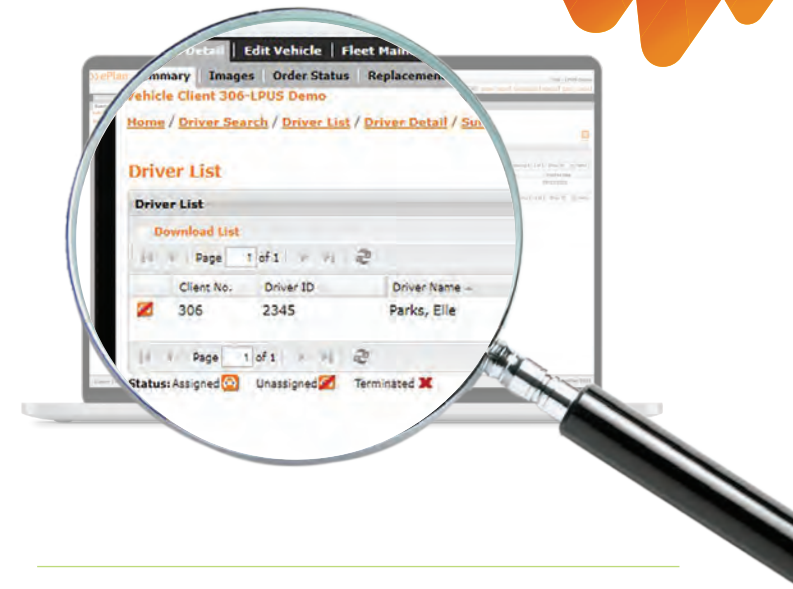
4

Check the box to terminate the current driver. Click save.

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expert tips

You have the option to backdate the start date for current and new drivers if needed.

You can always reactivate a terminated driver if applicable.

What is a terminated driver?

If one of your employees has left the company, changed roles or is no longer an active driver for any reason, it's best to use the terminated status. Don't worry - a driver record remains in ePlan so you always have a historical view of your fleet activity. And, you can always re-activate them later if needed.

+ Editing a vehicle

Fleet managers often need to edit vehicle information, such as Client Unit #, vehicle class or level structure. It's easy to do in ePlan in just a few steps:

1 To edit a vehicle in ePlan, select the Fleet Tab and enter the search criteria to locate the vehicle you wish to edit. Then select "View Vehicle."

2 If your search returns multiple vehicles, use the icon on the left to edit the vehicle record from the Fleet List view.
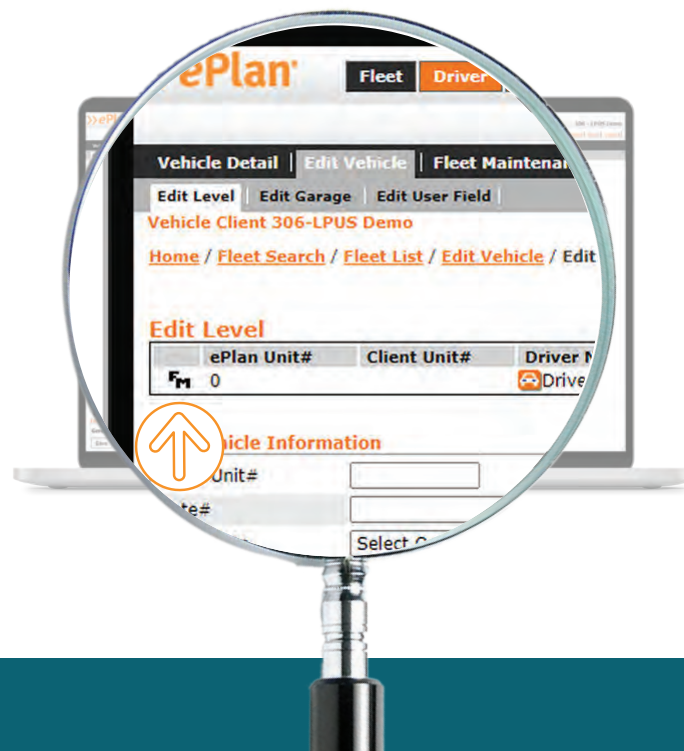
best practices

Be sure to update billing levels if you're moving the vehicle from one driver level to another. This will ensure invoices are sent to the proper location.

If you're enrolled in License & Title services, keeping your vehicle data up-to-date ensures registration renewal occurs seamlessly.

keep in mind

If you change the Client Unit #, be sure to notify your Account Manager so we can properly list the new number to any invoices, fuel cards, Vehicle Maintenance Guide (VMG), etc.

3

Once on the Vehicle Detail page, select the Edit Vehicle tab on the black navigation bar. From there, you have the ability to edit the Client Unit #, vehicle class or level information for the vehicle selected.

Once you've updated the information, click Save.
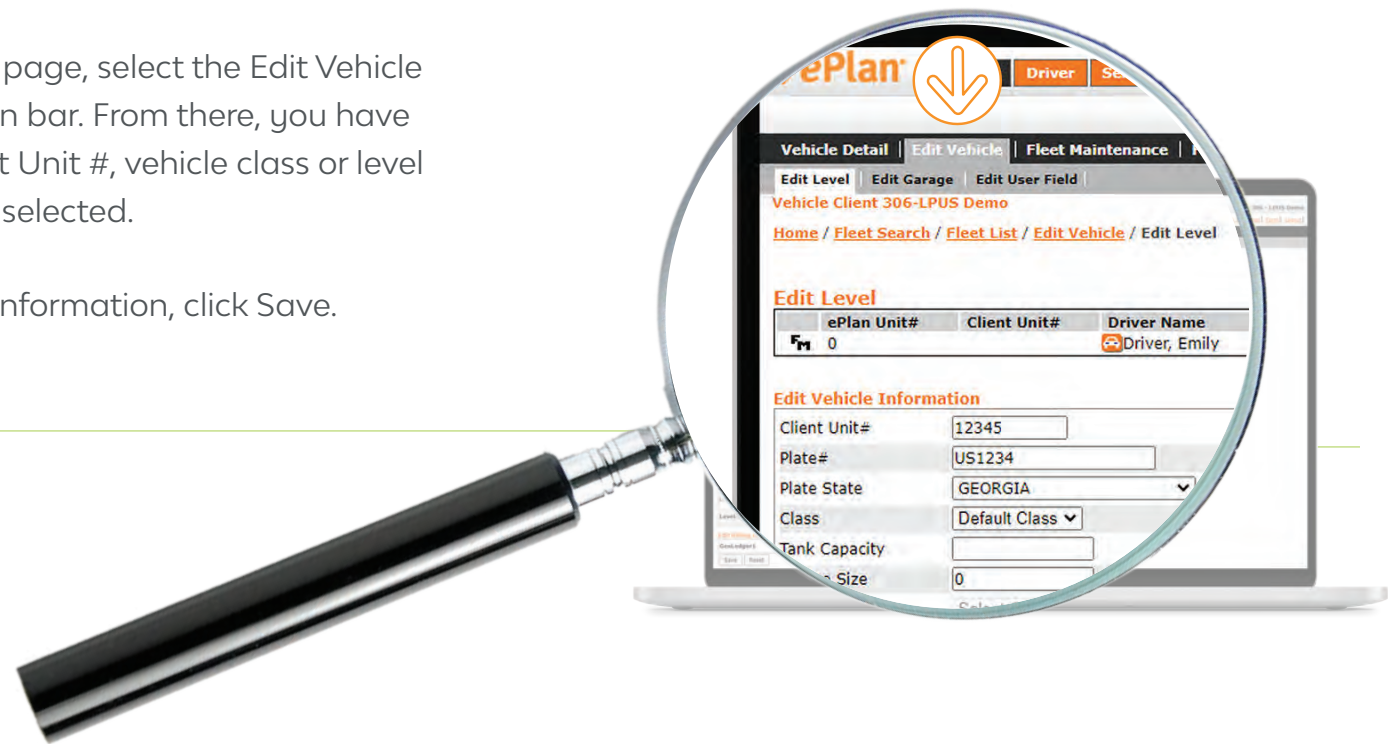
did you know

ePlan offers the ability to lookup vehicles using a variety of search criteria, such as Client Unit #, Driver Name, Driver ID, VIN, city, state and more.
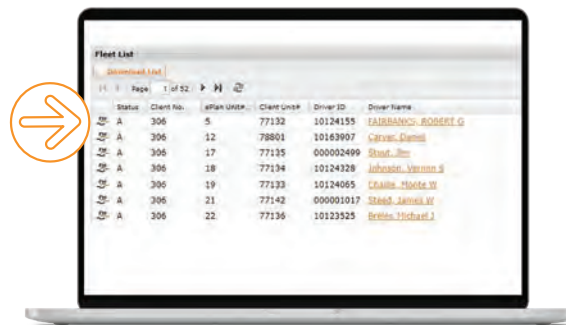
+ Editing a garage address

Some fleets utilize the Garage Address when a vehicle is housed at a different location than the driver's home, such as a job site or out-of-state address.

1 To edit a Garage Address in ePlan, select the Fleet Tab and enter the search criteria to locate the vehicle you wish to edit. Then select "View Vehicle."

If your search returns multiple vehicles, use the icon on the left to edit the vehicle record from the Fleet List view.

2 Once on the Vehicle Detail page, select the Edit Vehicle tab on the black navigation bar and then the Edit Garage.

Edit the address and click save when done.

did you know?

You can change the existing garage address or even clear it, by clicking reset.

keep in mind

The garaged address will be used for registration purposes only. The driver's address will be used for all mailings. This can be verified in the driver record under Driver Detail.

expert tips

When updating the garaged address, enter ZIP code and select "Find ZIP" to auto-populate the city, state and county.

You can also change the search option to "by state" to locate an address by city or state.

best practices

Be sure to verify the correct county for registration purposes, and override if needed.

+ Ordering strategy & planning

As you're planning for your next order cycle, you need to know which vehicle is the best option for your fleet.

ePlan's Life Cycle Cost Analysis tool can help. This feature allows you to compare up to 30 vehicles at a time to better understand the projected costs of operating a vehicle throughout the life of its lease.

This Life Cycle Analysis, or LCCA, combines financial projections with additional data points so you can choose the vehicle that best meets your company goals while keeping your drivers' needs in mind.

best practices

Many fleet managers assess projected cost per mile, cost per month, fuel economy or carbon emission to find the vehicle that best suits their fleet's goals and objectives.

Be sure to consider what's best for your drivers' operational needs, such as interior legroom, towing capacity or horsepower.

For the best results, create a separate LCCA for each vehicle segment.



Here's how to get started:

From the "Order" tab, select "Life Cycle" and then "New LCCA."

Be sure to name it. Customize the operating variables, such as months in service, miles in service, tire replacement intervals and fuel costs. For a more accurate projection, you can apply additional inputs, including fees and depreciation or interest rates.

Next, select a vehicle from the "Any Vehicles" tab, or as a best practice, run your analysis with a pre-built spec from the "Specs" tab.

To add another spec to your analysis, click "Compare Another Vehicle" under the Selected Vehicles section.

Once you have selected your vehicles, click "View Summary".
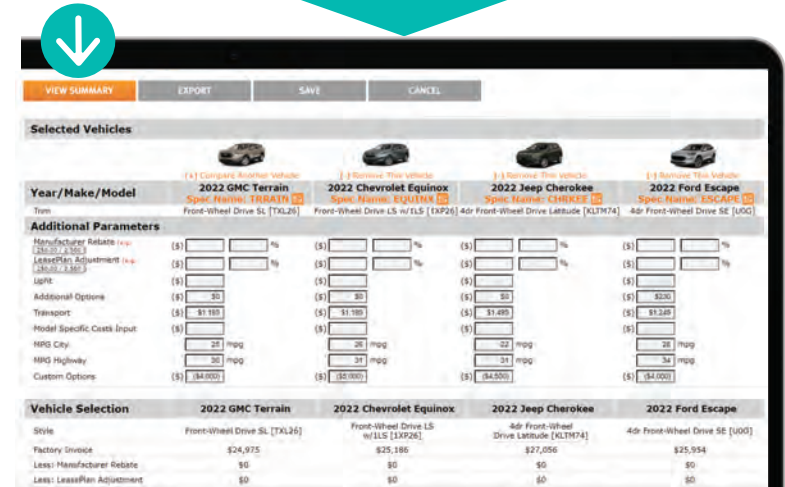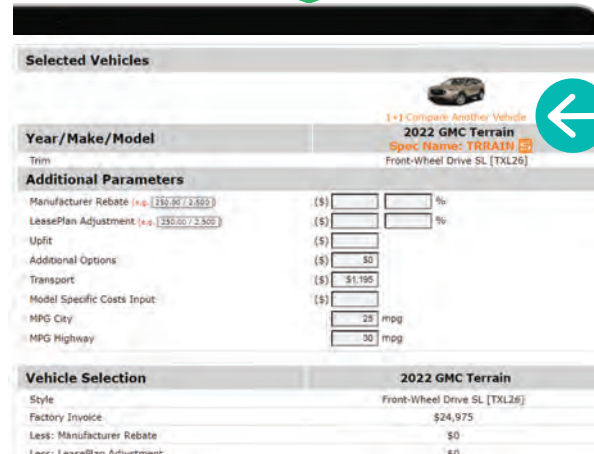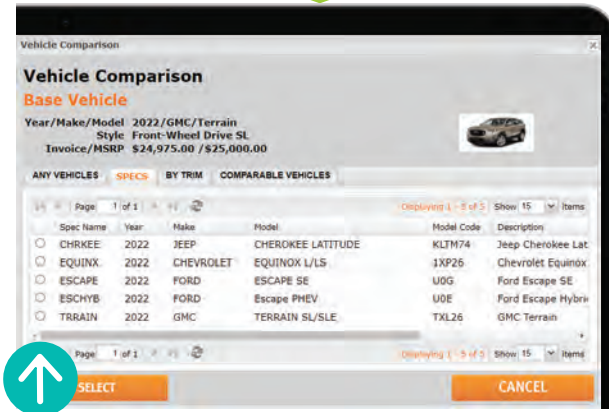
Now you can compare vehicles side-by-side to review the data that is most important to your fleet and better inform decisions for your upcoming order cycle.

expert tips

For a faster analysis, be sure to have key data points readily available – such as lease terms, depreciation value and admin fees.

To save time, click "Set Default Parameters" to automatically populate your custom data points each time you create a new LCCA.

You can export your analysis into an Excel file, or save your vehicle comparisons to access them any time from the LCCA List tab.

did you know
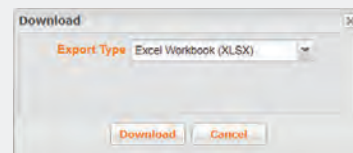
The Life Cycle Cost Analysis tool allows you to better understand the components that make up a vehicle's total cost of ownership, such as maintenance, repair and fuel costs, depreciation, fees, taxes, interest and insurance.

The capitalized cost is all the charges or fees that roll into putting a new vehicle into a lease, such as tax, title and license.

The book value is the expected value of the vehicle at the end of the lease.

╋ Factory ordering

Ordering vehicles direct from the manufacturer is one of the most effective methods of vehicle acquisition, assuring you have a custom-built vehicle that is suited for the job at hand. ePlan makes this process easy and efficient.

From the "Order" tab, click on "Create Factory Order."

If you're replacing an existing vehicle in your fleet, select "Replacement Order." Otherwise, select "New Order."

did you know ?

Our vehicle acquisition experts will work to find the best dealer in the closest proximity that typically handles courtesy deliveries. However, if you have a preferred dealership you want the vehicle delivered to, enter that information. We will try to accommodate that if the dealer does courtesy deliveries for fleet.
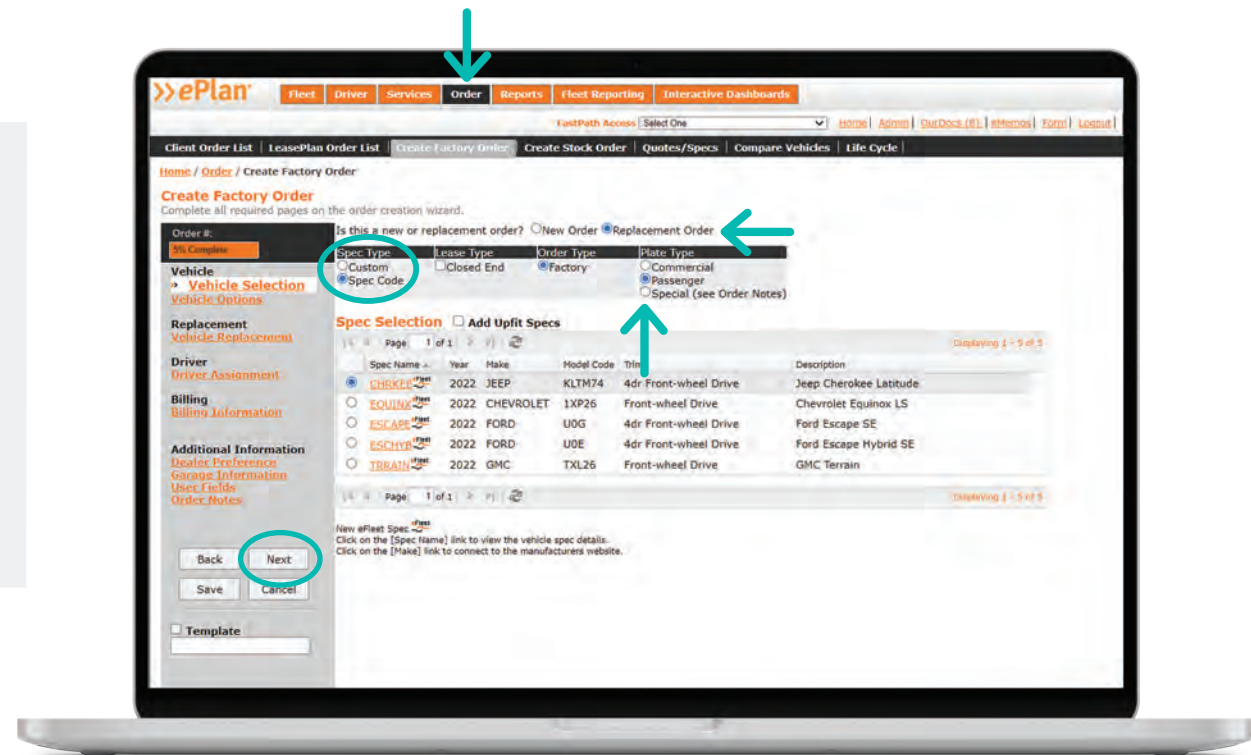
STEP **1**

Choose your Vehicle Selection

- Specify your Spec Type by selecting Custom or Spec Code. As a best practice, use the Spec Code option to order a vehicle from your approved specs. Alternatively, you can build your custom vehicle on the fly by selecting Custom.

- Indicate the Plate Type – Commercial, Passenger, or Special. This helps assure the vehicle is registered correctly.

- Click "Next" to continue.

STEP 2

Select your Vehicle Options

- When creating your order from a spec you can:
  - Verify or select new exterior and interior colors or seat options.
  - Verify or select new options for powertrain, wheels and tires, additional packages, fleet options and emissions.
  - Once all sections are verified, click "Next."

STEP 3

Enter Vehicle Replacement Details

- Search for the vehicle you are replacing using the search criteria and click "View Vehicle."
- Verify odometer reading and disposal information.
- If you do not want LeasePlan to handle pick up and sale of the replacement vehicle, select Client Information Only.

best practices

If you are replacing a vehicle owned by another lessor, click the Third Party Replacement link to complete disposal information.

STEP **4**

Verify Driver Assignment

- The driver is assigned either by looking up an existing driver's name or driver ID or you can add a new driver.
- Click "Next" to continue.

Using the Garaged Address

If you want the vehicle delivered and/or registered to an address other than assigned driver's address, you can enter it here. All mail will be sent to the driver's address and the registration and delivery will go to the garage address.

expert tips

As a best practice, select "Spec Code" from the Spec Type options to order from one of your pre-built and approved specs.

If your vehicle requires upfitting, click the checkbox for Upfit Specs to add to the selected vehicle.

Vehicle Replacement shows the vehicle you selected to be replaced.

Current Mileage shows the most recent odometer LeasePlan has on file for this vehicle. If you want to update the odometer, click into the field and enter the updated information. You must click "Confirm Mileage" when you're done.

Driver Assignment shows the driver assigned to the Replacement Vehicle and will be the driver assigned to the vehicle you are ordering.

keep in mind

Some vehicles in your fleet could have options added by third party vendors. These additional options are called "Upfit Options."

Be sure to factor in additional time if your vehicle has after-market upfit options.

As you're planning your order cycle, remember to stay up-to-date with manufacturer production and order cutoff dates.

STEP **5**

Verify Billing Information

- Enter the Depreciation Term you want to assign to this order. The rate will automatically populate based on the term.

- If this is a replacement order, the level codes will carry over from the replacement vehicle. If this is a new order, you will need to assign corresponding level codes.

- Assign the correct FM program #, which will assure this vehicle is set up for the right services.

- Confirm if the new vehicle will be set up on Personal Mileage Reporting or not.

- Click "Next" to continue.

- You will then be asked if you are ready to complete the order. Click "yes."

best practices

The billing information for the vehicle you are ordering will be the same as the replacement vehicle.

+ Vehicle order status

Once you have placed orders for new vehicles, you might want to check on the status from time to time. ePlan offers several ways to view and report on order statuses. Let's take a look at how you can stay informed on the order-to-delivery timeline.

1 From the Fleet Reporting tab, select "Inventory and Status" from the navigation menu and locate the Vehicle Order Status report.

did you know ?
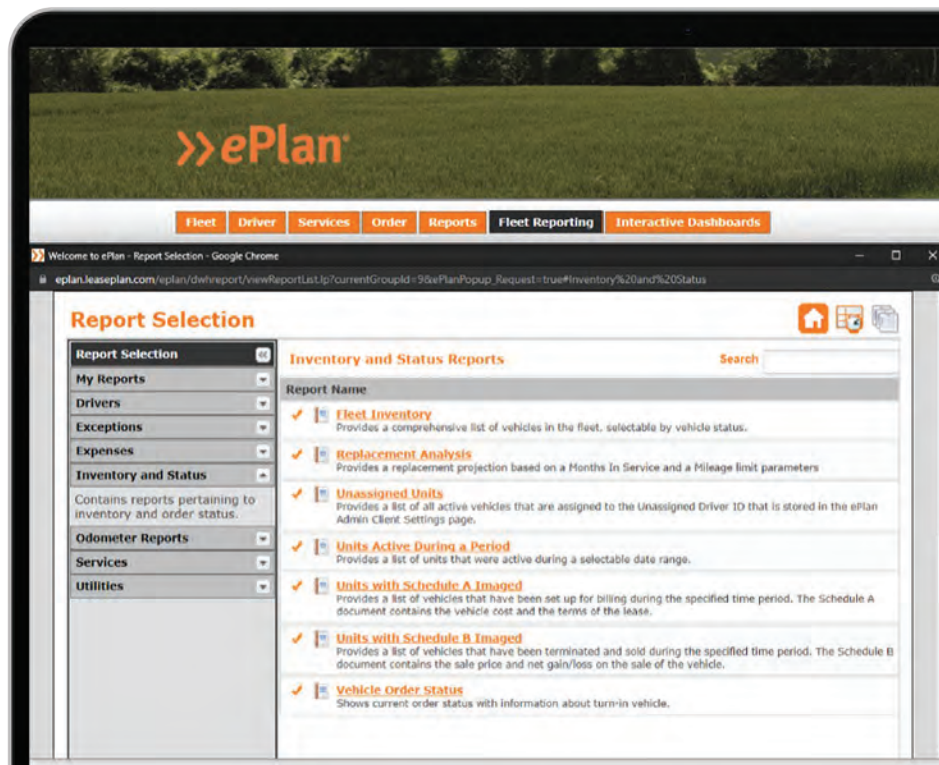
Your drivers can access their vehicle's status in the MyLeasePlan app and be notified when it's time to pick up the vehicle at the dealer.

best practices

Be sure to give your drivers access to the MyLeasePlan app so they can report pickup and enter license plate information, which helps ensure accurate data when it's time to renew.

2 On the next screen, you can customize your report to display the information you need to see.

Once you select the parameters, click on "View." When the report appears, click on "Export" to view in Excel.

Vehicle Order Status
Shows current order status with information about turn-in vehicle.

Report Parameters

Client ID:	Order Date Range:	Order Start Date:	Order End Date:	Status:
☑ (Select All)	All			☐ (Select All)
☑ 1015				☐ Active
				☐ Terminated
				☑ On Order
				☐ Cancelled

Filter by Levels:	Level 1:	Level 2:	Level 3:	Level 4:
☐ (Select All)	☑ (Select All)	☑ (Select All)	☑ (Select All)	☑ (Sele
☑ No Level Filtering	☑ All	☑ All	☑ All	☑ All
☐ Level 1				
☐ Level 2				
☐ Level 3				

Order Status Columns To Show:
- ☑ (Select All)
- ☑ Client Number
- ☑ Level 1
- ☑ Level 1 Description
- ☐ Level 2

Report Sections to Show:
- ☐ (Select All)
- ☑ Details
- ☑ Summary
- ☑ Glossary: Order Status Definitions

View | Export | Schedule | Save Report Results | Cancel

expert tips

Order status details can also be viewed from the LeasePlan Order List tab, on the vehicle record under Vehicle Detail tab or using the Fleet Search and filtering by Vehicle Status On-Order.

For further clarification on status definitions, check the glossary option and the list will be included in your report download.

keep in mind

UPF = Update from the upfitter

MFR = Update from the manufacturer

LP = Update from LeasePlan

+ Renewal tools

Did you know ePlan offers several tools to help you stay on top of registration renewals? Be sure to take advantage of dashboards, exception lists and reports to keep your fleet in compliance and drivers on the road.

Home Page Dashboards

ePlan's home page dashboards provide a visual look at your fleet's open renewals. You can click into any of the dashboards to drill down to different segments of data and view a list of your fleet's renewal statuses.

+ **Registration Renewal Coming Due** – provides an overview of renewals by state. Keep in mind processing times and registration requirements can vary from state to state, and often county to county. This a great tool to help you manage your most affected states.

+ **Registration Renewal** – shows you where your fleet's renewals are in the process. Our experts recommend reviewing the "91-120 days out" segment to assure your driver data is accurate for streamlined service.
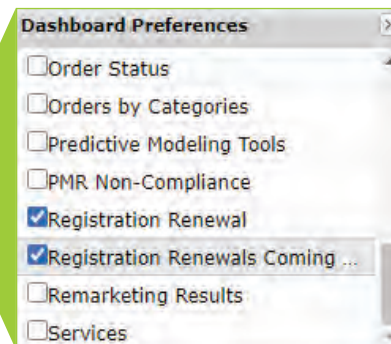
best practices

To streamline the renewal process, many fleet managers use the available reports to communicate with their drivers who need to provide documents to complete the renewals. This could be a smog, emission or safety inspection.

Ensuring driver email addresses are correct in ePlan, and utilizing this as your preferred method of communication, helps us contact your drivers in the most efficient manner.

We recommend you always review your driver's address for accuracy – including state, county, along with the vehicle's garage address (if utilized).

Home Page Exceptions List

It's important to maintain the plate number and expiration date in ePlan so we can stay on top of your vehicle registration needs.

+ Missing Registration Info – Use this quick link to monitor vehicles with missing tag information. Then, click into any record to add missing plate number and expiration date.

To configure your home page with these tools, expand the Dashboard Preferences by clicking the arrows on the right side of the screen. Then select Exceptions, Registration Renewal and Registration Renewal Coming Due.

Dashboard Preferences
- ☑ Exceptions
- ☐ Fleet Summary (Text View)
- ☐ Fuel Cards Not Being Used
- ☐ Fuel Exceptions
- ☐ Fuel Expense Trending
- ☐ Immediate Action Requested
- ☐ Maintenance Cost Categories
- ☐ Maintenance Non-Utilization

Exceptions
Fuel:	985
Fuel Card Inactivity:	702
Missing Registration Info:	82
Pending MVR Requests:	119
MVR Monitoring Results:	6

expert tips

Need to brush up on state registration requirements? Navigate to the Services tab, select License & Title and then State Requirements.

You can view registration copies, communications and corresponding documents by clicking on the Images Tab under the vehicle profile.

To view how the registration was sent (FedEx or USPS) and any available tracking information, click on the Renewal Tab from the vehicle profile.

Key Indicators

+ **Red ! on Driver Profile** – indicates there is an outstanding state requirement preventing the renewal of the registration.
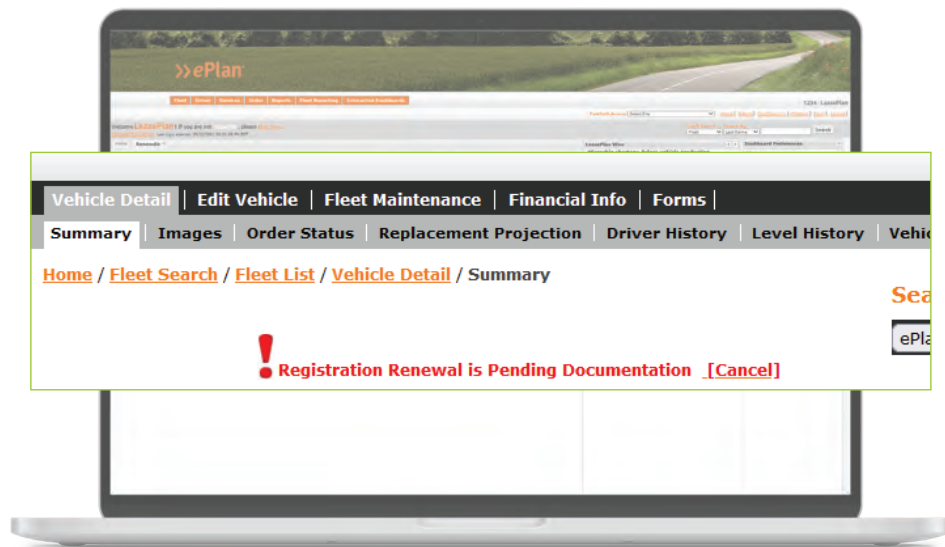
+ **State Conflict Status** – this means that the registration address does not match the license plate state. To resolve this, you can request a state change right in ePlan or work with your account manager for any other needs.

did you know?

The MyLeasePlan app offers drivers the most interactive experience with LeasePlan – allowing the ability to upload documents, locate vendors, check order status, review your fleet policy with the help of Elle and more! Contact your account manager to get enrolled today.

keep in mind

LeasePlan's renewal process begins 90 days prior to the expiration date. The registration will either be mailed by LeasePlan or the DMV to the address on file, so be sure to keep driver's addresses up-to-date in ePlan.

If a vehicle is temporarily out of service, it's important to let us know to so we can properly manage the renewal.

+ Requesting replacement documents

Do you ever have a driver who has lost their fuel card, misplaced their insurance certificate, or left their driver kit at a maintenance provider? It does happen from time to time. That's why we've made it easy to request a replacement right from ePlan.

How to request replacement driver kits, fuel or EV RFID cards, insurance cards or vehicle maintenance guides
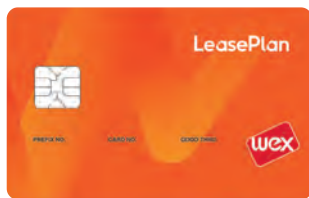
To request replacement documents and materials in ePlan, navigate to the **Fleet** tab and enter the search criteria to locate the corresponding vehicle. Once you click into the vehicle record using the icon on the left, click the **Forms** tab and then select **Vehicle Management Material(s) Replacement**.

From here, it's easy to use the **Replacement Order Request** form to select the documents needing replacement. Simply select materials on an individual basis, or select the Driver Kit option, which includes replacements for all materials.

When you're ready to submit your request, **confirm the mailing address** and shipping method.

How to request a replacement registration

To request a replacement registration card, navigate to the **Vehicle Detail** tab on a vehicle record. Scroll down to the **Plate Information** section and click the **Replacement Request** link.

From here, you have the option to request replacement plates or decals, or make a change to a vehicle's registration details.

Click **submit** when you've made the selection. The replacement registration will be mailed to the address shown on the screen.

expert tips

Did you know? You can also use the FastPath Access on the home page to quickly navigate to the **Vehicle Management Material Replacement** form.

Digital copies of Vehicle Maintenance Guides and Registration documents can also be found in ePlan. While on a vehicle record, navigate to **Images** under the **Vehicle Detail** and search the **Available Leased Images** section.

Drivers using the MyLeasePlan app can also upload or view digital copies of Registration and Vehicle Maintenance Guides, when available, in the Glovebox.

Glovebox

2020 CHEVROLET
TRAVERSE
LP-1234

VIN: ABC1234DEF456GHI789

REGISTRATION

REG. # LP1234
STATE GA
EXPIRES Mar 01, 2022

Store your vehicle registration

My Docs ADD

Home Glovebox My Car Mileage More
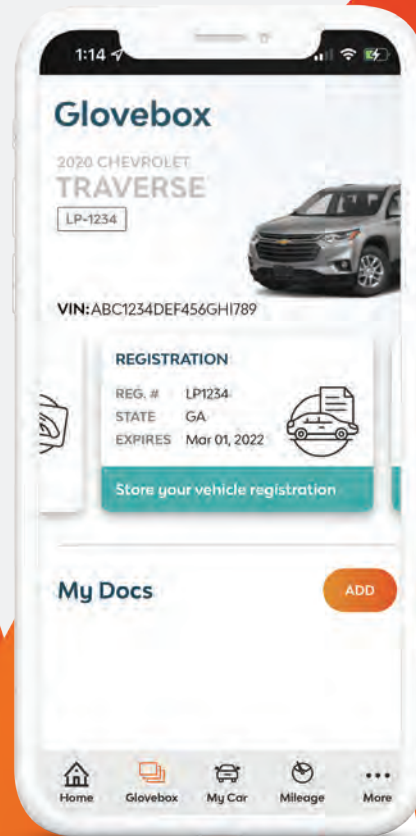
best practices

When requesting replacement materials, be sure to select the corresponding reason for replacement in the drop-down menu. Selecting lost or stolen will terminate the fuel card immediately.

Sometimes fuel cards can get left in the wrong vehicle. Remember fuel cards are assigned to vehicles, not drivers. Be sure to check the **Maintenance Information** section on the vehicle record to confirm you're requesting the correct card.

Maintenance Information

FM Contract #	LP1234		
Fuel Card	12340001234000123-400	Vendor	**Wright Express**
Vehicle Maintenance Guide #	12345		
Most Recent Fueling	09/14/2021		
Most Recent PM			

+ Fleet reporting

As you look for ways to manage your fleet costs and streamline operations, be sure to take advantage of the valuable reports in ePlan. From gaining insight into the financial aspects of your fleet to viewing a comprehensive list of the vehicles and drivers, you can access it all from the Fleet Reporting section.

Let's take a look at some of the most popular reports in ePlan.

Executive Summary

If you're focused on financial analysis, the **Executive Summary** report provides a view of your fleet's total cost of ownership by month. Many fleet managers use this report to get a comprehensive look at their overall fleet costs and to forecast future expenses.

Use this report to view your lease expenses, operating costs, maintenance and fuel transactions, remarketing results and more. The Executive Summary report also offers an overview of your active vehicle inventory, new vehicle orders, active drivers and total miles driven.

To access this report in **Fleet Reporting**, click **Expenses**, then **Cost of Ownership**.
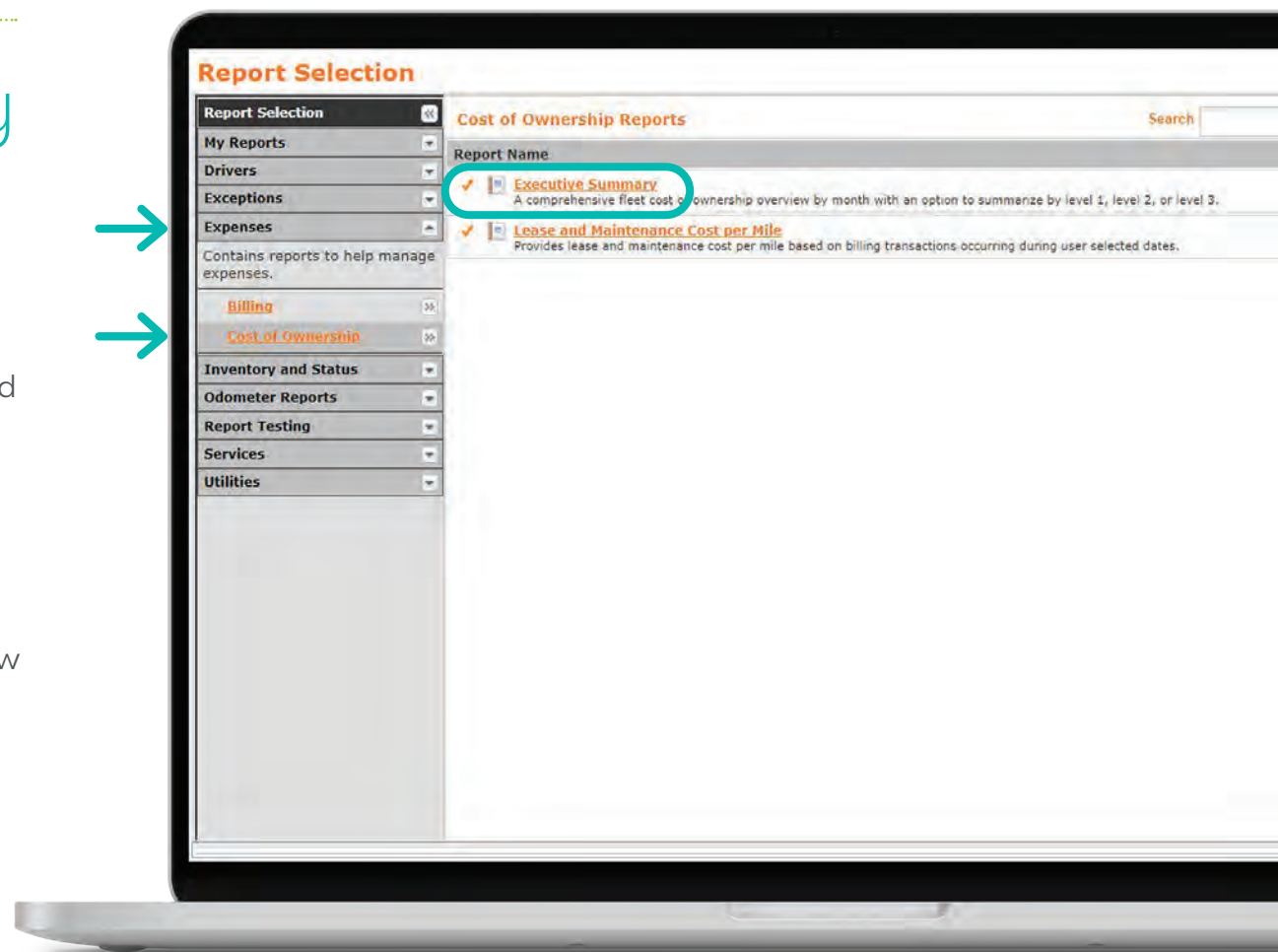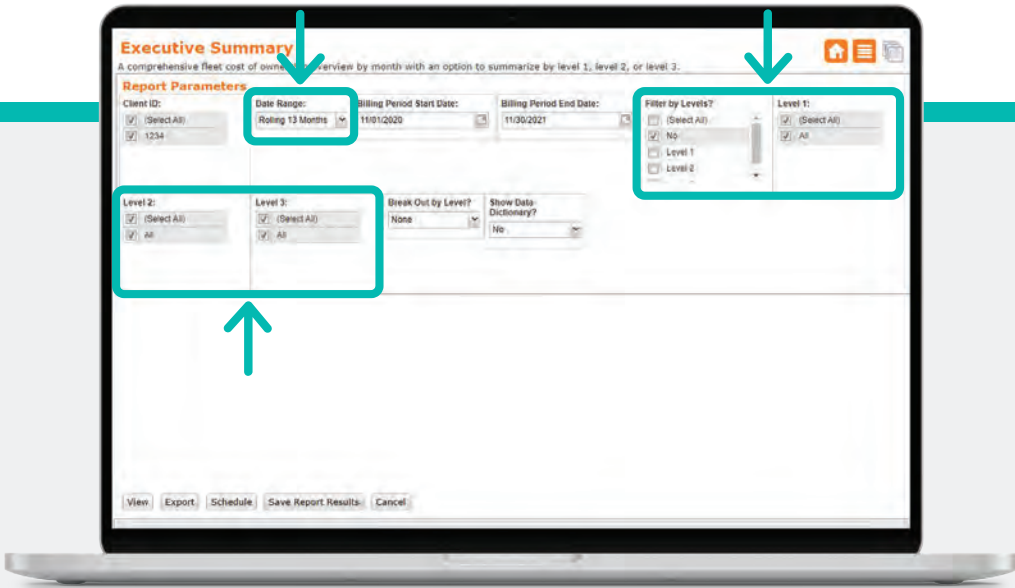
expert tips

Remember to customize your date ranges to analyze specific periods. You also have the option to summarize or filter data by levels, which is especially handy when comparing different segments of your fleet.

did you know?

You can schedule any of ePlan's reports to be sent to you on a regular cadence, including monthly, weekly or daily. From Fleet Reporting, click the Schedule List icon at the top right of the screen. Then click the Create Schedule icon to select email recipients and schedule details.
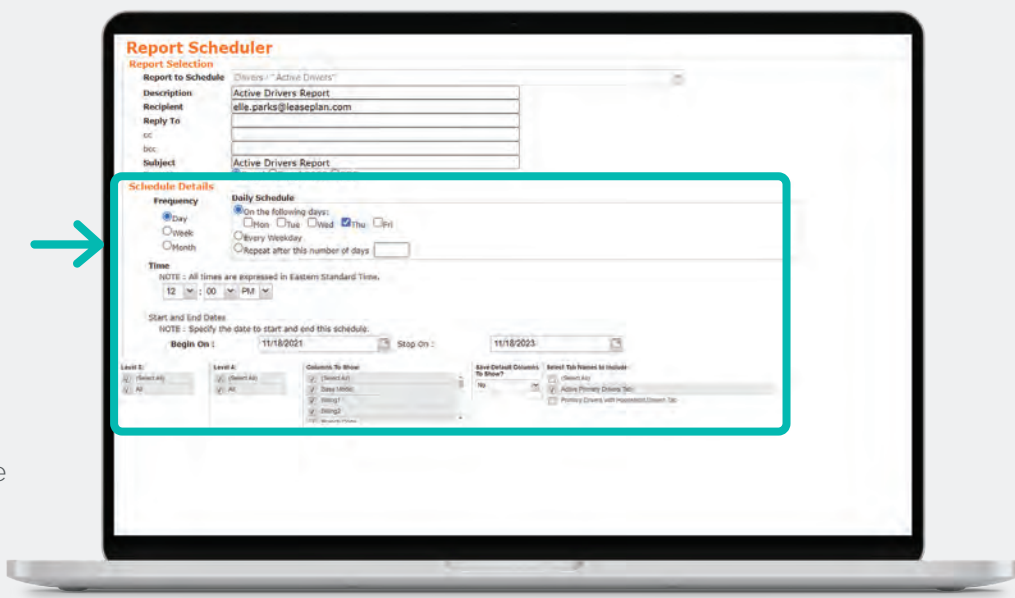
best practices

If you ever need to make changes to your scheduled report, visit your Schedule Reports List and select the Edit Schedule icon. To Delete a report's schedule, select the report, and click the Delete icon.

Fleet Inventory

The **Fleet Inventory** report is one of the most foundational reports fleet managers can use to find valuable information about the vehicles in their fleet. It should be your first source of information if you have a question about a vehicle in your fleet.

This report is also helpful when you need to validate driver assignments, driver contact details, vehicle location and more.

best practices

We recommend using the Fleet Inventory report to track important data points such as odometer reading, lease term, who is assigned to the vehicle, and location of the vehicle.
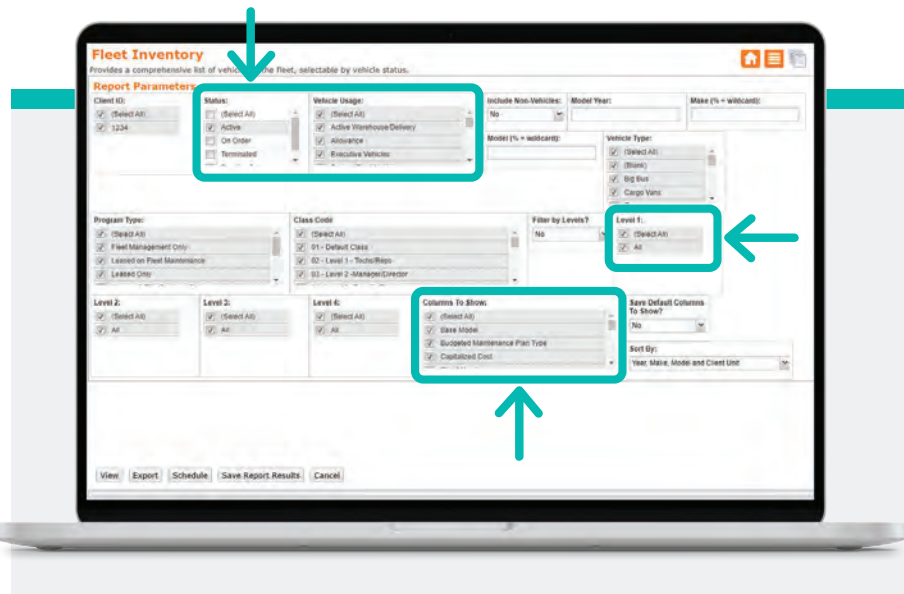
expert tips

You can analyze the exact information you want to view by configuring report parameters. Start by setting the filter criteria like vehicle status, usage or equipment to narrow down your report results.

Many fleet managers find it useful to filter by their custom levels. And, if you need to trim down the report results, simply select – or deselect – the data to display in each column.

Lease Accounting Standards

The **Lease Accounting Standards** report provides data needed for lease accounting under the Financial Accounting Standards Boards (FASB) guidelines. It contains all vehicles that were billed for a lease payment in the reporting period.

This report includes key data points – like interest rate, book value, cap cost, depreciation, fees and taxes – that are needed to record your leases for accounting purposes.
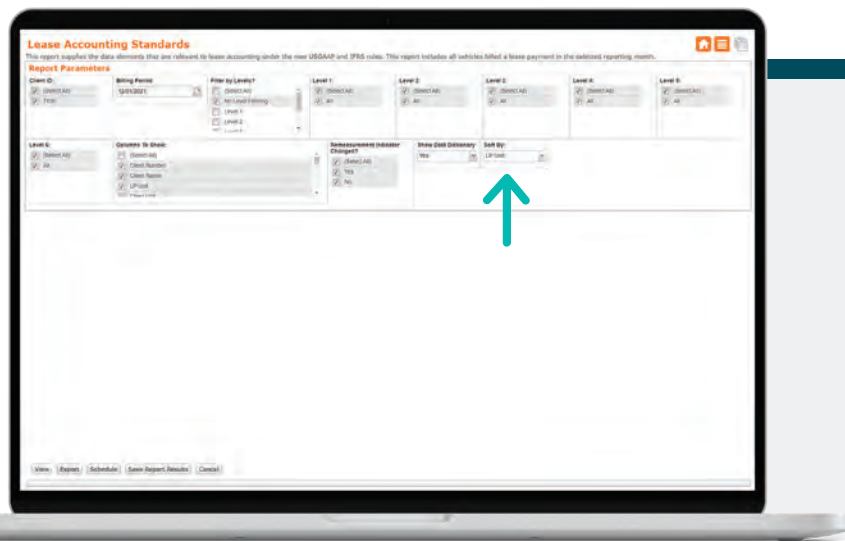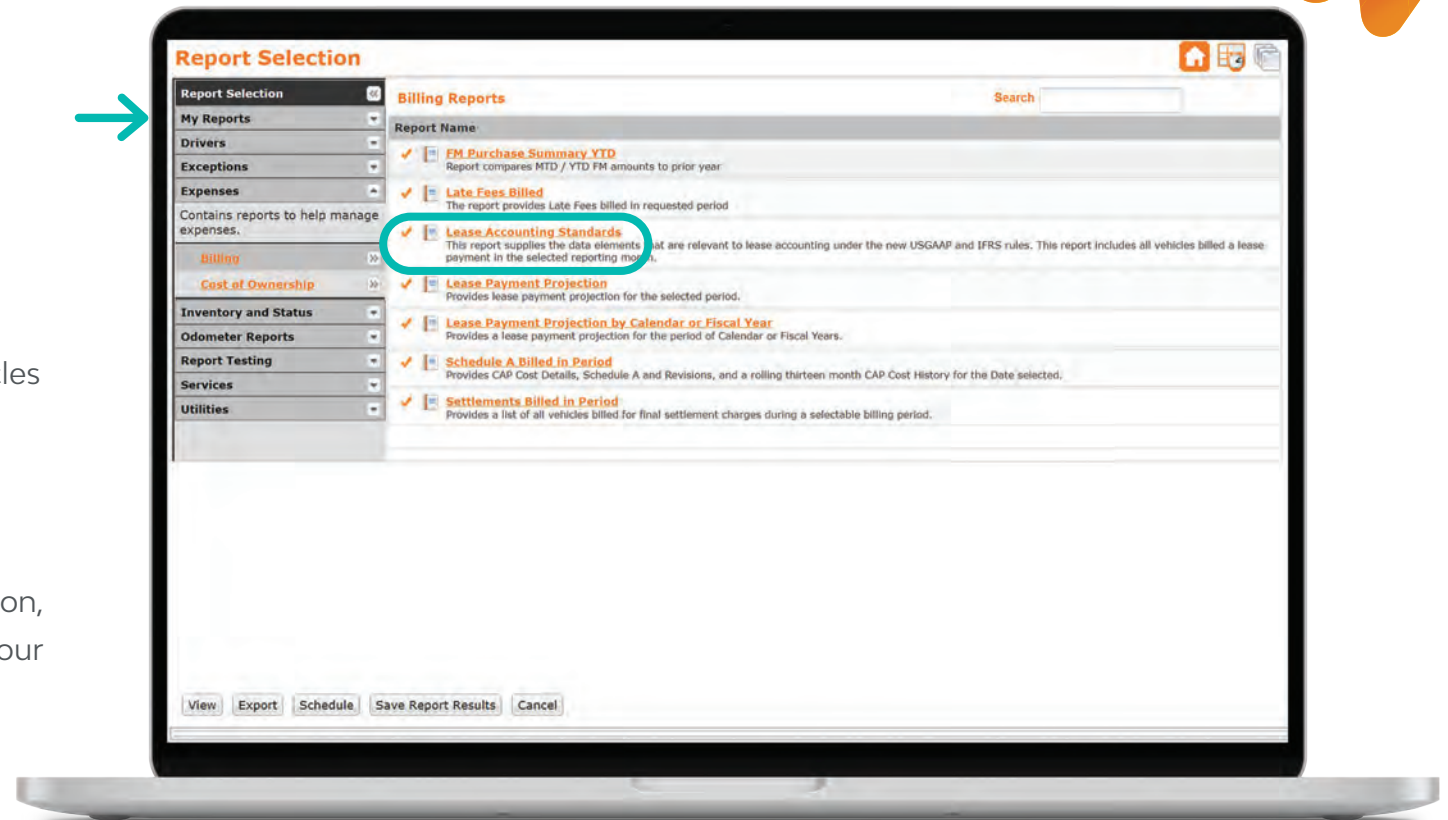
best practices

We recommend providing the Lease Accounting Standards report to your finance team monthly. It can be especially helpful at year-end to reconcile your lease accounting.
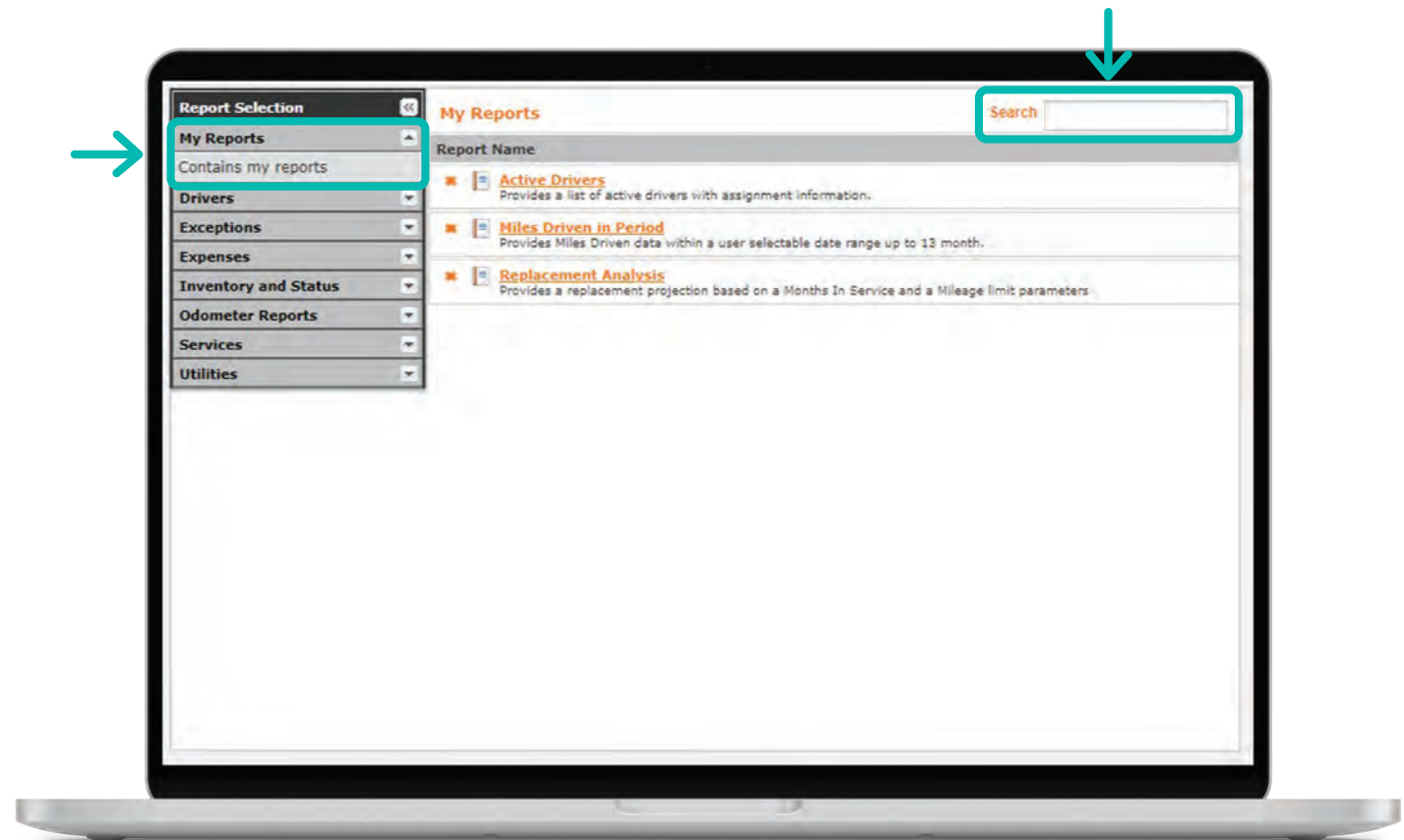
expert tips

To get a detailed look at what each data point means, select the option to "Show data dictionary". The dictionary will accompany your report on a new tab.

Other reports we like

Replacement Analysis: This report provides you with insight on what vehicles need to be replaced and when. We recommend using it when planning for your new order cycles.

Miles Driven in a Period: This is a great tool to assess mileage trends across drivers by role type, state or any other segment of your fleet. It can also help to identify employees who are driving over or under mileage terms.

Active Drivers: This is one of the most used reports that provides a list of all employees who are active within the fleet. The Active Drivers report can be useful to verify driver addresses and contact information is up to date, in addition to vehicle assignment.

expert tips

These are just a few of the reports ePlan has to offer - there are many more you can use to gain insight into your fleet. We encourage you to explore all the reporting options in ePlan or use the search function to find a specific report.

did you know?

You can save your most frequently used reports to the My Reports section for quick access by clicking the check mark next to the report name.