



Freedom



Security



Control

BP Alerts

BP Alerts watches your BP Fuel Cards for you.

Set limits on how your cards can be used and BP Alerts will monitor and advise you - by email or SMS - when those limits are breached.

Any card can be controlled. You can allow usage by value, by location or time of day. Also check the quality of driver's odometer readings so you can easily calculate fuel consumption.



Getting started with BP Alerts

You must be logged into BP AccountManager in order to access BP Alerts.
To access BP Alerts click on the "BP Alerts" Tab shown below.

Click here



The Welcome Page is displayed (see screen below). Use the Online help found in the 'more information' section to help you understand how to use BP Alerts.



The left hand menu shows the main sections linked to BP Alerts.

These are the **Card Profiles, Account Spending Limits, Control Panel, Access permissions and Audit trail.**

If you do not see all of the boxes displayed this will be due to the level of your access to BP Alerts. The person responsible for your BP Fuel Card Account in your organisation has full access and can update access levels.

The **Card Profiles** section is used to set up restrictions on individual cards or groups of cards for Locations/Site Types, Odometer readings, Days/Times, and value of card spend.

The **Account Spend Limits** Section is used to set up a limit on the account to help manage account spend for a given period of time.

The **Control Panel** is used for viewing or changing the Alerts settings including the email address or SMS number to which the Alerts will be sent and a facility to override the card profile settings.

Access Permissions allows you to control access to BP Alerts throughout your organisation.

Audit Trail provides details of all the actions that have been recently taken on AccountManager including those for BP Alerts.

1. Setting card profiles

There are two steps involved in setting up Card Profiles in order to receive alerts.

1. **Set up the Profile itself.** This is done using the Create, or Edit profile function. **Apply the Profile** - this attaches the profile to cards that you wish to restrict and can be set at Parent, authority or card level as you require.
2. **Delete Profile** - would only be used if you want to stop a card profile being active.
3. **View Profile** - lets you see all the card profiles you have set up.



1.1. Setting up a Profile

1. Click on "Card Profile" and then "Create Profile" to get started.
2. Some standard profiles have been set up to help you get started. Click on 'Base the profile on an existing one', to see profiles available.
3. Enter a unique name for the profile, e.g. "Not to be used at weekends" or "Local sites only".
4. To activate a restriction put a tick in each box so the alert is activated. Multiple conditions can be allocated to a Profile.



For example, you may want to restrict usage to local sites only or Monday to Friday only.

Please note: You may have Alert Options lines shown depending on your BP Alerts Access settings. If you want to change these contact the person responsible for managing your BP Fuel Card Account.

If you make any mistakes during the process of setting up the profile or want to move between pages you can do this using the navigation buttons "To previous page", "Back", "Cancel", "Next" and "To next page" shown above.

Click on "Next" to move to the next page.

1.2 Site Type Restrictions

This page allows you to define restrictions against the Types of Site.

An example is given below to show how settings are made using this screen.

You want to be alerted to transactions made at motorway sites, the following settings need to be made.



1.3 Location Restrictions

This allows you to set restrictions by Country and by area by using the 'selections' available in the choice boxes. Pickups made outside of the selected locations would be allowed but would produce an alert.

Click "Next" to move to the next screen.



Please note: Do not select the same option for the 'Status Field' and the 'how should locations not be specified field' or you will either receive no alerts or alerts for every transaction made.

1.4 Day and Time Restrictions

This allows you to define restrictions on card usage depending on the day of the week or the time of day. An example of how the screen could be used.

A condition is set to alert when purchases are made at weekends or after 18.00 hours on a Friday, tick the alert box for Saturday and Sunday.

Please note: (1) If the box is ticked you will get an alert during that time period or (2) If not ticked you will get an alert outside the designated time.



1.5 Odometer Restriction

This allows you to check on odometer readings, receiving alerts when the threshold is violated. You enter the maximum odometer distance between transactions (in miles) and you will be alerted if subsequent odometer readings increase by more than the threshold figure you have entered. You will also receive an alert if an odometer reading for the transaction is less than that recorded on the previous transaction for the card.



The next step asks you to confirm the restriction you are setting.

1.6 Card Spending Limit Restrictions

This allows you to specify spending limits for a particular period. The example below restricts spending to £100 in any calendar day. You can set daily, weekly and monthly limits together or independently and you will be alerted when 80% of the spending target is reached.

Please note: you can have an alert for daily , weekly and monthly or any combination.



1.7 Confirming the Profile

This is the final stage of setting up any Profile. Click on the “finish” button to allow the chosen restrictions to be saved.



You can View or Edit any of the different sets of Restrictions set up for the Profile by clicking on the  symbol.



1.8 Applying a Profile

Applying the profile is the final stage of the process and **MUST** be actioned to allow the restrictions to be activated.

From the BP Alerts Welcome page select Card Profiles then select Applying a Profile. The page below is displayed.

Select the profile name you wish to be applied.

There are 3 options on the left hand side:

- **Set the base profile for my parent** - This means that any new cards created for this Parent Customer will automatically have the Profile applied (if the card has not already had a profile manually selected).
- **Set the base profile for my Authority** - This means that any new cards created for the Authority or selected Authorities will automatically have the Profile applied (if the card has not already had a profile manually selected).
- **Apply this profile to my cards** - This applies the profile to selected Cards.

On the right hand side are the destinations to which alerts are sent. Enter SMS number and/or email address as required.

2. Account Spending limits

2.1 Changing Account Spending Limits

From the BP Alerts Welcome page select the Account Spending Limits option. Select Change Account Spending Limits (Please note this restriction is placed against the account not the Cards).

Account Spending limits can be applied at Authority Level. The Parent Level option is only available if you are user who is linked at Parent Level. If you are user linked at Authority level then only the Account Spending Limit for that authority is displayed.

The screenshot below shows that the values that should be entered on the Account Spending Limits page if for example you want a £100 daily limit to be applied. An alert is triggered when 80% of the limit reached.

Authority / Authority Level	Daily	Weekly	Monthly	Threshold	Alert
All Authorities	100				80%

Your Spending Limit	Daily	Weekly	Monthly
100	400	200	

Threshold
80

If you choose to apply a profile to specific Authorities within a Parent Authorities then select the "Your Authorities" option and click "Next".

A list of Authorities will be displayed. Place a tick in the boxes within the Select column to select the specific Authorities. After confirming the selection of Authorities a further page is displayed and the Profile can be applied to these Authorities.

3. Setting BP Alerts Access

Select Access Permissions from the BP Alerts Welcome Page.



Select the **Change User Access** option.

In the screen displayed you will see all of the choices open to you with this option. The screen wizard will take you through, using the NEXT and FINISH buttons.



Change Access Permission Options

3.1 Set permissions for all users

Set the access permissions for your users. For each restriction category you can set the access to Hide, View or View & Change. Set permissions for selected users This screen allows you to select the users that will have their access permissions changed. To identify the permission they have hold your mouse over the column heading to see what the permission related to. (i.e Cp relates to Card Profiles; Lo to Locations etc)

3.2 Enable BP Alerts for all Authorities

This screen shows a summary of the user permissions you've set up. Click the Finish button to confirm these settings and enables BP Alerts for selected Authorities. You will be able to set the user permissions for the authorities you select on this screen.

3.3 Disable BP Alerts for all Authorities

This screen shows a summary of the user permissions you've set up and allows you to switch Alerts off for all of your authorities. Click the Finish button to confirm this change. **Disable BP Alerts for Selected Authorities** This screen shows a summary of the user permissions you've set up and allows you to switch Alerts off for selected authorities. Click the Finish button to confirm these changes.

4. Control Panel

Select the control panel option from the menu. If this cannot be seen by the user then permission for this functionality has not been given by the Fleet Manager. You will see the following options.



4.1 View Control Panel Settings

This allows you to see what is currently set up for Alerts

- Main email and SMS detail
- Any restrictions at parent or authority level

No changes can be made when using this 'view' option

4.2 Change Control Panel Settings



Options that are available:-

4.3 Update BP Alerts settings/contact details

Tick this box to be given the option to enter a new SMS number or email address for the account at top level. This will be the default SMS and email address for each authority if no change is made at authority level.

4.4 Override Restrictions for the entire parent

Tick this box to be given the option to remove restrictions for the whole account.

4.5 Override restrictions for selected authorities

Tick this box to be given the option to remove Alert restrictions on selected authorities.

4.6 Update contact detail for the customers

Click on this box to allow you to enter specific SMS and /or email addresses for each authority.
(NB Only authorities you have enabled for Alerts will be shown)

Click on Next and on the following screen you are able to see the Authorities that are enabled for Alerts. Where required, click on the **edit** button to enable you to enter a SMS and/or email against the selected Authority. The SMS and Email address you have set within the Control Panel previously will remain as default details and will be the SMS and email address for all authorities prior to any changes made using this screen.

This screen now allows you to enter SMS and Email details for each authority independently.

Click to **submit** and save once you have made the changes.

Then continue through the screen(s) until you have updated all the authorities required. Click on **next** and you will see the Confirmation page as below indicating how many authority details you have updated.

You can make changes to SMS/Email addresses for authorities as many times as you require.

FAQ

This list contains the Frequently Asked Questions that have been raised in connection with this service.

How long will the alert take to come through after the transaction has been made?

It would be immediate by SMS text and within 30 minutes via email. We use a premium SMS service to ensure swift delivery to all major mobile phone networks.

What detail is in the alert email message?

Day and time, card number, expiry date, transaction ID and site ID and the reason for the alert.

What information comes through on the SMS text?

Exactly as the email, however messages are limited to the standard 160 characters for an SMS text message.

Where can I see which profiles are currently applied to my cards or an account?

Card profiles has an option 'View profiles applied' which provides details on profiles applied at parent Authority and card level.

Some of the profiles linked to my cards are marked with '*' or ''. What do these mean?**

A single asterisk '*' means the profile has been applied as a default at Authority account level.

A double asterisk '**' means the profile has been applied as a default at parent level.

As a fleet manager, how do I give other BP PLUS users in my organisation access to the BP Alerts facilities?

Within the BP Alerts Access Permission option, select Change Access. You will then see further options which allow you, amongst other things, to change the access permissions either for all your users or for a selected few.

I am a fleet manager with multiple accounts.

How do I turn BP Alerts on and off for each one?

Within the BP Alerts Access Permission option, select Change Access. You will then see four options that allow you to enable and disable BP Alerts for all - or a selection of - your accounts.

How do I remove the profiles currently applied to my cards?

Within the BP Alerts Profiles option, select Delete Profile and then you have the options of deleting a profile, so that it cannot be used in future, or of stopping a profile from applying, in which case the profile will still be available for future use.

Please note that if you remove a profile from a single card any Authority (or parent-level) default profile in existence. Will become effective instead.

When I have linked a profile to one of my cards how long will it take for the restrictions to become effective?

They should be effective within 15 minutes.

What Fuel Cards work with Alerts?

BP PLUS, BP PLUS Bunker, BP PLUS Europa and the BP Agency Fuel Cards work with BP Alerts. BP Supercharge does not work with BP Alerts.

What about my Europa cards, will the restrictions be UK only or will it work abroad?

BP Alerts is a European offer, so it is available for Europa Cards at European Sites.

What about restricting TOLLS on my Europa Card?

Unfortunately, alerts are not possible for Tolls at present.

For further information about BP Online Services, please email bpcardsadmin@bp.com or telephone 0845 603 0723