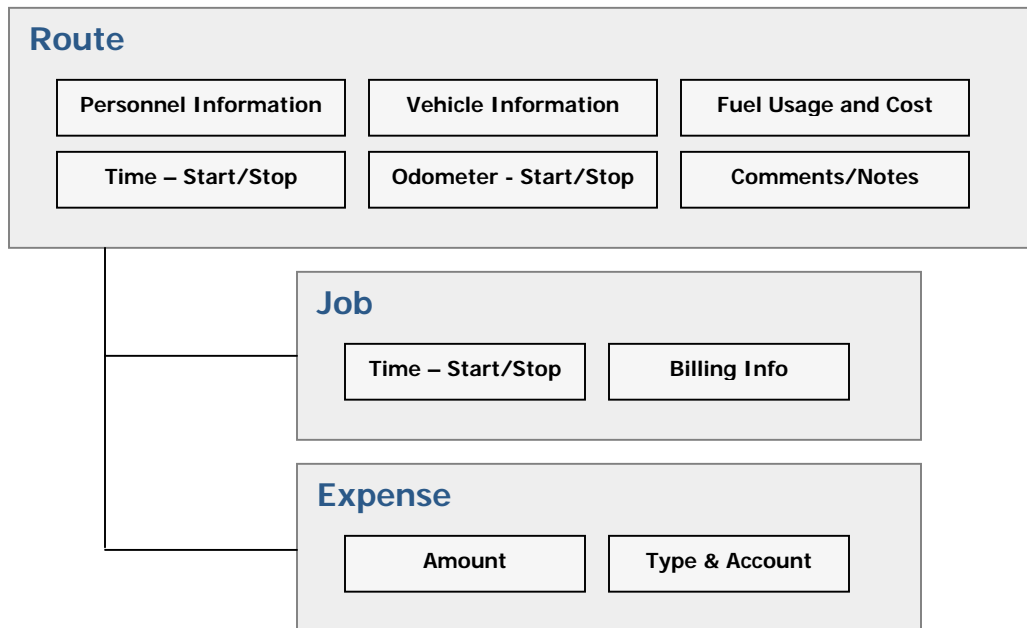

CUSTOMER GUIDE: Route Records

Overview

FLEETMATE provides a feature to record **Daily Routes** worked by drivers at your business. Each Route will accommodate any number of **Jobs/Stops** worked during the day, as well as a **Fuel Purchase**, and any number of **Expenses** incurred during the Route. The Route record also integrates time and distance information. It enables you to know who drove what and when, how far, and for how long.

There is a structure to Route records. A simplified diagram below illustrates this basic structure.



Simplified Route Information Structure

The diagram above, although overly simplified, illustrates that there can be any number of Jobs recorded within the context of a Route. Likewise, there can be any number of Expense records entered for a Route.

If your business does not involve this type of activity, you can opt to skip this feature. This feature will only be useful to businesses that have a staff of drivers or field reps that travel every day using fleet vehicles, and that have no other means of recording this information.

CUSTOMER GUIDE: Route Records

Using the Route Window



To record Route records, click the **Route Log** toolbar button, or use the **Company Data | Route Log...** menu option. The Route Log window will then appear.

The Route log window lists **Personnel** records in the upper pane. This list is made up of personnel records where the **Vehicle Operator** box has been checked. These Personnel records drive the Route Log feature in FLEETMATE.

The center pane lists existing **Route** records for the currently selected employee. Use the **Route List Start Date** field at the bottom of the window to limit how many recent route records are listed.

The lower pane contains Five (5) **Topic Tabs**, each containing a different type of information for whatever route is selected in the center pane. These **Topic Tabs** contain the following information:

- **General**
Contains basic information about the Route including the **Vehicle** used, **Odometer** values and **Start** and **Stop** times.
- **Jobs/Stops**
This tab contains individual **Jobs** worked within the context of the current Route.
- **Fuel**
This tab is used to record Fuel usage information, including **Volume** and **Cost**.
- **Expenses**
This tab accommodates any number of individual **Expense** records, to account for expenses incurred during the course of the route
- **Comments**
Enables you to record any **Comments** or special notations regarding this route. This is a free form text box that will accommodate up to 32000 characters.

When you add the first route, you'll have to manually set the date. Afterwards, the system will advance the **Date** to the next date in sequence. This is automatic.

You can also use the **Extended Control** tab of the **Options | Preferences...** window to skip **Saturdays** and/or **Sundays**. This will be helpful to you if your business does not operate on weekends.

CUSTOMER GUIDE: Route Records

Adding a Route Record



To record Route records, click the **Route Log** toolbar button, or use the **Company Data | Route Log...** menu option. The Route Log window will then appear.

The Route log window lists **Personnel** records in the upper pane. This list is made up of personnel records where the **Vehicle Operator** box has been checked. Select the Personnel record you need.

Click the **Add Route** button, or right-click in the Route pane (center) and choose the **Add New Route** menu option. If the employee is **NOT** assigned a default vehicle, a **Pick Vehicle** dialog will appear. Select the needed vehicle from the list and click **OK**, or just double-click on the vehicle. Otherwise, the default vehicle for this employee will be automatically selected.

A new Route record will be automatically added to the list. You will now need to use the **General** tab to enter the **Dates**, **Start/Stop** times, **Odometer** values, etc. The system will automatically calculate and display elapsed time and distance driven. Using the **Description** field is recommended, so that you can more easily identify a route. You may choose to enter a code or number if your business uses these to identify your routes. The **Shift** field is optional. The **Overnight** flag can be used as an indicator that special compensation is involved for this route. This is an optional item.

Click **Save Current Route** to save your work.

Recording **Job** records is optional. Visit the **Jobs/Stops** tab to record jobs for this route if necessary. Right-click in the Jobs/Stops list to **Add** and **Delete** jobs, and double-click on an existing Job record to **Edit** it. Refer to the next topic for more information on the Job window and its fields.

Click the **Fuel** tab to enter Fuel information, if applicable. Enter the Volume, Cost, Octane, Brand, Dealer, State and Account. These fields are similar to those fields found on a standard Fuel Log record. The information entered here will appear as a Fuel Log record for the related vehicle.

Click the **Expenses** tab to record Expenses related to this route. Right-click in the Expenses list to **Add** and **Delete** expense records, and double-click on an existing Expense record to **Edit** it. Refer to the next topic for more information on the Expense window and its fields.

If you have remarks or special notations to record for the route, click the **Comments** tab. This is a free form text box that will accommodate up to 32000 characters.

Click **Save Current Route** to save your work.

CUSTOMER GUIDE: Route Records

Adding a Job Record to a Route



The Route log window lists **Personnel** records in the upper pane. Select the Personnel record you need. Next, routes for this employee will be listed in the route (center) pane. Locate and select the needed route record.

Click the **Jobs/Stops** tab. If existing Job records are present for this route, you will see them listed in the Job list.

To add a new **Job** record, right-click in the Job list area and choose **Add New Job to Current Route** from the popup menu. A new Job Record will appear.

Employee and Vehicle information will appear in the upper portion of the Job window, just as a reference to remind you of the route you are currently working on. The **Job Number** and **Location** fields should be used to identify this specific job. Enter information that is relevant to your business.

Enter the **Start** and **Stop** times for this job, and enter the **Last Job Odometer** and **Arrival Odometer** values. The use of these fields is optional.

Enter an **Account** or select an Account from the droplist.

The **Comments** field can contain any remarks or special notations regarding this job.

The **Amount Billed** is an optional field to use to record any billing amount if applicable. Likewise, the **Amount Collected** is an optional field to use to record any payments that were collected by the driver. The **Payment Type** is used to identify the method of payment, such as Credit Card, Cash, Personal Check, etc. Enter a Payment Type or select a value from the droplist.

The **Confirmed** and **Completed** flags are optional, and can be used to indicate special status information at your business.

Click **OK** to save the current Job record, or click **Cancel** to discard your entries.

CUSTOMER GUIDE: Route Records

Editing a Job Record on a Route



The Route log window lists **Personnel** records in the upper pane. Select the Personnel record you need. Next, routes for this employee will be listed in the route (center) pane. Locate and select the needed route record.

Click the **Jobs/Stops** tab. If existing Job records are present for this route, you will see them listed in the Job list.

To edit a **Job** record, double-click on the Job record. The Job Record will appear.

You may now edit the job record as needed.

Click **OK** to save your changes, or click **Cancel** to discard your changes, and to leave the Job record unchanged.

CUSTOMER GUIDE: Route Records

Deleting a Job Record



The Route log window lists **Personnel** records in the upper pane. Select the Personnel record you need. Next, routes for this employee will be listed in the route (center) pane. Locate and select the needed route record.

Click the **Jobs/Stops** tab. If existing Job records are present for this route, you will see them listed in the Job list.

To delete a **Job** record, right-click on the Job record and choose **Delete Selected Job Record** from the popup menu. If you have Delete Confirmation activated, the system will ask if you are sure you want to delete this record. Click either the **Yes** or **No** button. If you do not have Delete Confirmation activated, the record will be immediately deleted from your database.

CUSTOMER GUIDE: Route Records

Adding an Expense Record to a Route



The Route log window lists **Personnel** records in the upper pane. Select the Personnel record you need. Next, routes for this employee will be listed in the route (center) pane. Locate and select the needed route record.

Click the **Expenses** tab. If existing Expense records are present for this route, you will see them listed in the Expenses list.

To add a new **Expense** record, right-click in the Expense list area and choose **Add New Expense to Current Route** from the popup menu. A new Expense Record will appear.

In the **Amount** field, enter the amount of this expense. Enter a **Type** for this expense, or select a value from the droplist. A Type entry helps to categorize the expense.

Enter an **Account**, or select an existing account from the droplist.

Provide a **Description** for this expense.

The **Business Expense** box is checked by default, since the system assumes a business expense. If this is a personal expense, clear the check box.

Click **OK** to save the current Job record, or click **Cancel** to discard your entries.

The Expense records added here are added to the **Payments/Fees/Expenses** tab on the Main Window for the related vehicle.

CUSTOMER GUIDE: Route Records

Editing an Expense Record on a Route



The Route log window lists **Personnel** records in the upper pane. Select the Personnel record you need. Next, routes for this employee will be listed in the route (center) pane. Locate and select the needed route record.

Click the **Expenses** tab. If existing Expense records are present for this route, you will see them listed in the expenses list.

To edit an **Expense** record, double-click on the Expense record. The Expense Record will appear.

You may now edit the expense record as needed.

Click **OK** to save your changes, or click **Cancel** to discard your changes, and to leave the Expense record unchanged.

CUSTOMER GUIDE: Route Records

Deleting an Expense Record



The Route log window lists **Personnel** records in the upper pane. Select the Personnel record you need. Next, routes for this employee will be listed in the route (center) pane. Locate and select the needed route record.

Click the **Expenses** tab. If existing Expense records are present for this route, you will see them listed in the Expenses list.

To delete an **Expense** record, right-click on the Expense record and choose **Delete Selected Expense Record** from the popup menu. If you have Delete Confirmation activated, the system will ask if you are sure you want to delete this record. Click either the **Yes** or **No** button. If you do not have Delete Confirmation activated, the record will be immediately deleted from your database.