
CUSTOMER GUIDE: Fuel Records

Overview

FLEETMATE enables you to log each fuel purchase. This will enable you to monitor fuel economy for each vehicle in your fleet. It will also give you fuel consumption and cost information to help you track your fuel usage and cost. Further, entering fuel log records will automatically increase the odometer value on the vehicle in which the fuel was used.

This document will discuss how to record fuel purchases.

Entering a Fuel Log Record

A **Fuel Log** is maintained for each vehicle in your fleet. The first step in this process is to select the necessary vehicle. Click a vehicle record in the upper pane of the main window to select a vehicle.

Existing fuel log records will be listed under the Fuel Log topic tab in the Activity Pane of the main window. If a different topic tab is currently active (**bold**), click the **Fuel Log** topic tab.

Right-click in the Fuel Log list area, and then choose **Add Fuel Record...** from the popup menu. A new Fuel Log record will appear.

Click the Calendar button to set the date field to reflect the date of the fuel purchase and then press the **[Tab]** key. The **Last Odometer** field will contain the ending odometer value of the last fuel log record entered. If the value is correct, press the **[Tab]** key. Otherwise, adjust the Last Odometer field as necessary then press **[Tab]**.

In the **Odometer Now** field enter the odometer value of the vehicle at the time of the fuel purchase, then press **[Tab]**. This will cause the system to calculate the distance traveled, and will advance your cursor to the **Vol Units** field. In the Vol Units field, enter the quantity of fuel units (e.g. Gallons or Litres) purchased.

If the fuel was dispensed from your inventory, check the **From Inventory** box. In this case the **Brand** field will change to **Inventory ID**. This represents the Stock Number(s) you are using for fleet fuel. Select the Inventory ID from the list of available options. Otherwise, enter the Brand of fuel purchased and press **[Tab]**.

If the fuel was dispensed from your inventory, the **Total Cost** will be automatically calculated using the price per unit on the inventory record, times the quantity of units dispensed. Otherwise, enter the total cost of the fuel purchased and press **[Tab]**. Enter the **Type/Grade** of the fuel purchased and the **Dealer** name and **State** where the fuel was purchased. The Type/Grade and Dealer fields are disabled when fuel is dispensed from inventory.

Select the **Driver** that was operating the vehicle at the time of the fuel purchase and press **[Tab]**. Select the **Account Number** that you want to associate with this fuel purchase.

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You may now enter any optional comments that may be relevant to this Fuel Log record, and use the Remaining four (4) custom fields to record additional information if necessary.

Once all required information is present on a fuel log record, the **OK** button will become enabled. Click **OK** to save the record, or click **Cancel** to abandon the current Fuel Log record.



More Information

When Adding Fuel Log records a **Save and Enter Next** button will appear on the window. You can use this button to enter several consecutive Fuel Log records for the same vehicle without closing the Fuel Log window and repeating the Add function. This can save time if you need to enter two or more Fuel Log records for the same vehicle. When finished, click the **Cancel** button to close the window.

The **Save and Enter Next** button does not appear when editing an existing Fuel Log records.

The default fuel **Type/Grade** value for any vehicle may be set individually for each vehicle by using the **Engine/Body** tab of the **Details** window for a vehicle. The **Fuel Type/Grade** droplist field can be set to the type of fuel (or Octane) the vehicle uses on a routine basis. This value will then be used as a default as you enter Fuel Log records. If you do not use this feature, the value last used will be offered as a default.

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Editing a Fuel Log Record

A fuel log is maintained for each vehicle in your fleet. The first step in this process is to select the necessary vehicle. Click a vehicle record in the upper pane of the main window to select a vehicle.

Existing fuel log records will be listed under the **Fuel Log** topic tab in the Activity Pane of the main window. If a different topic tab is currently active (**bold**), click the **Fuel Log** topic tab.

Double-click on the Fuel Log record you wish to edit, or right-click on the Fuel Log record, and then choose **Edit Fuel Record...** from the popup menu. The existing Fuel Log record will appear.

You may now edit the Fuel Log record as necessary. Click **OK** to save your changes, or click **Cancel** to discard your changes and close the window.

Deleting a Fuel Log Record

Click a vehicle record in the vehicle pane of the main window to select a vehicle.

Existing fuel log records will be listed under the **Fuel Log** topic tab in the Activity Pane of the main window. If a different topic tab is currently active (**bold**), click the **Fuel Log** topic tab.

Right-click on the Fuel Log record you wish to delete, and then choose **Delete Fuel 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.

Note that if you delete a Fuel Log record that involved fuel from your inventory, the quantity of fuel originally recorded as dispensed, will be returned to inventory using a credit transaction.

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Entering Fuel Records for Multiple Vehicles

Use the **Vehicle | Daily Fuel Entry Worksheet...** option to enter fuel data for a specific date for multiple vehicles using one window.

This menu option is only activated if two or more vehicles are selected, or highlighted. To use this feature, follow these steps:

1. Select two (2) or more vehicle records by dragging through consecutive vehicles, or by holding your **[Ctrl]** key while clicking on individual vehicle records.
2. Right-Click your mouse.
3. Select the **Daily Fuel Entry Worksheet...** menu option from the popup menu.

This window will resemble a worksheet. Select the **Fuel Date** using the date field at the bottom of the window. The dialog only supports one date.

Enter the **Last Meter**, **Current Meter**, **Gallons** and **Total Cost** for each vehicle row. The remaining columns per row feature droplists of known values to make entry easier.

Once all values have been entered, click **Save All** to save your new fuel records, or click **Close** to close the window without adding your fuel records.