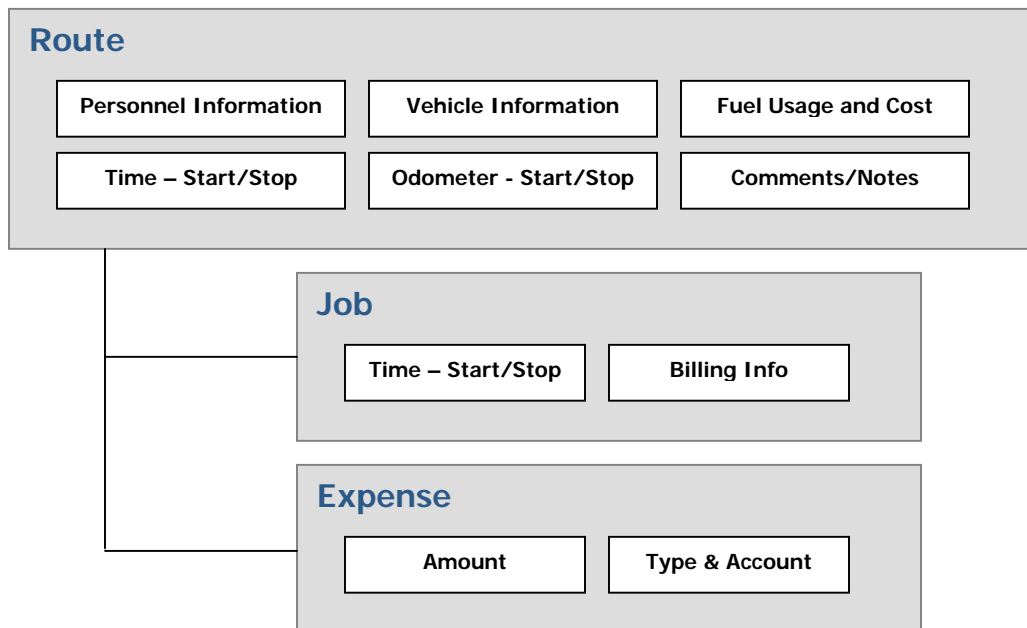

CUSTOMER GUIDE: Route Records

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.

CUSTOMER GUIDE: Route Records

Using the Route Window

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.

Route records record history. You cannot add a route record for a future date.

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.

Emp ID	Last Name	First Name	Mid Name
E00005	Adams	John Q	Quincy
E00009	Tyler	John	
E00000	Washington	George	

Route ID	Route Description	Vehicle Description
2014-04-13-E00005	Daily Deliveries	Veh No: 111-1 2012 FORD F-350

General | Jobs/Stops | Fuel | Expenses | Comments

Start Date: 04/13/2014 | Time Start: 0700 | Stop: 1730 | Hours: 10.5 | 10h 30m | Overnight
End Date: 04/13/2014 | Vehicle: Tag No: J765827 Veh No: 111-1 Unit No: 435-10 2012 FORD F-350
Shift: 1 | Odometer Start: 15000 | Stop: 15165 | Miles: 165
Desc: Daily Deliveries

Created: 04/13/2014 12:27:50 AM by: Unknown Last Edit: 04/13/2014 12:29:15 AM by: Unknown

Route List Start Date: 01/01/2000 | Save Current Route | Close

Route Log Window

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.

CUSTOMER GUIDE: Route Records

Adding a Route Record

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



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.

Add New Job Record

E00005 - Adams, John Q
Tag No: J765827 Veh No: 111-1 Unit No: 435-10 2012 FORD F-350 Pickup

Job No: 01
Location: Post Office Drop
Start Time: 0730 Stop Time: 0800 Hrs on Job: 0.50 00h 30m
Last Job Od: 15000 Arrival Od: 15021 Miles: 21
Account: 30010 - Contract - Baltimore County Government Agencies
Comments: This is a sample Job record.
Amount Billed: 0 Amount Collected by Driver: 0
Payment Type: N/A Confirmed Completed

OK Cancel

Route Job Record

Employee and Vehicle information will appear in the upper portion of the Job window. The Job Number and Location fields should be used to identify this specific job. Enter information that is relevant to your business.

CUSTOMER GUIDE: Route Records

Adding a Job Record to a Route

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.

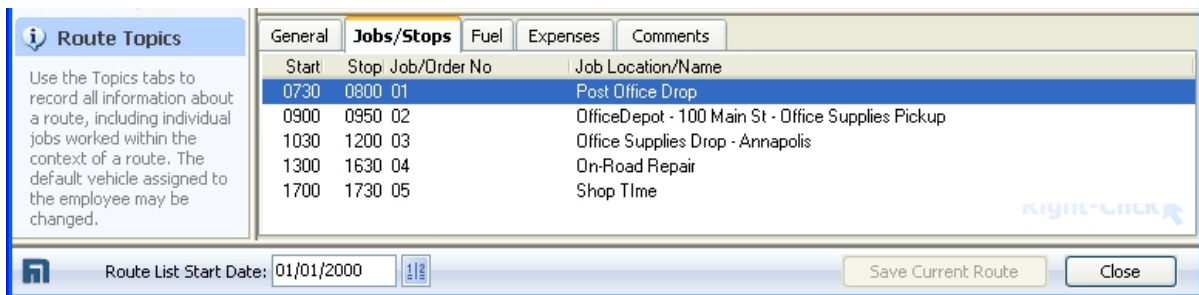
Enter an Account or select an Account from the droplist.

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.



Route Window – Jobs/Stops Tab

The picture above illustrates the Jobs/Stops tab with multiple job entries recorded.

CUSTOMER GUIDE: Route Records

Editing a Job Record on a Route



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

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.

Deleting a Job Record

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



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 tab on the Main Window for the related vehicle.

Editing an Expense Record on a Route

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.

Deleting an Expense Record

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.