
CUSTOMER GUIDE: Payment/Fees Records

Overview

FLEETMATE enables you to log any number of Payment/Fees records for each vehicle in your database. This will enable you to track and monitor expenses for items such as:

- Loan or lease payments
- Insurance premiums
- Inspection fees
- Registration fees
- Taxes, tolls, etc.

The screenshot shows a dialog box titled "Edit Existing Expense/Payment - Tag No: J889173 Veh No: 665-5 2002 Ford E-250". The form contains the following fields and values:

- Type: Registration (dropdown menu)
- Date: 3/24/2018 (calendar icon)
- Amount: 70.00 (text input)
- Business: Business (checkbox)
- Account: 40001 - Administrative Fees (dropdown menu)
- Description: MD Registration Renewal (dropdown menu)
- Comments: (empty text area)

At the bottom of the dialog, it shows: "Created: 3/24/2018 4:27:44 PM by: Unknown Last Edit: 3/24/2018 4:27:44 PM by: Unknown". There are "OK" and "Cancel" buttons at the bottom right.

Payment Record

This type of record is designed to capture expenses that are not related to fuel or to maintenance.

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Entering a Payment/Fees Record

A Payment/expense 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 vehicle pane of the main window to select it.

Existing payment/expense records will be listed under the Payments/Fees topic tab in the lower-left pane of the main window. If a different topic tab is currently active, click the Payments/Fees topic tab.

Right-click in the list area, and then choose Add Expense Record... from the popup menu. A new Expense/Payment record will appear.

For Loan/Lease, Registration, or Insurance Premium entries press **[Tab]** to go directly to the Type droplist and select the Type. This will automatically pull the loan payment, registration fee, or insurance premium amount from the Vehicle Details record in your database. Otherwise, enter a numeric value representing the Amount of the expense, and then press the **[Tab]** key.

Enter a Type or select an existing value from the droplist to help categorize this expense record, and then press **[Tab]**.

Click the Calendar button to set the date field to reflect the date of the expense and then press the **[Tab]** key.

Enter an Account or select an existing value from the droplist to help track this expense record, and then press **[Tab]**.

Enter a Description that describes this expense.

You may now click OK to save your expense record, or click Cancel to discard your entries and close the expense window.

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Editing a Payment/Expense Record

A Payment/Expense 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 vehicle pane of the main window to select a vehicle.

Existing payment/expense records will be listed under the Payments/Fees topic tab in the lower section of the main window. If a different topic tab is currently active, click the Payments/Fees topic tab.

Right-click on the expense record you wish to edit, and then choose Edit Expense Record from the popup menu. The existing Expense record will appear.

You may make any necessary changes to the expense record. Click OK to save your edited expense record, or click Cancel to discard your changes and close the expense window. The expense record will contain its prior values if you click Cancel.

Deleting a Payment/Expense Record

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

Existing payment/expense records will be listed under the Payments/Fees topic tab in the lower section of the main window. If a different topic tab is currently active, click the Payments/Fees topic tab.

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