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## CUSTOMER GUIDE: Payment/Expense Records

### Overview

FLEETMATE enables you to log any number of Payment/Expense records for each vehicle in your database. This will enable you to track and monitor items such as loan/lease payments, insurance premiums, inspection fees, tolls, or essentially any other type of expense not related to fuel or maintenance. This document will discuss how to record payment/expense records.

### Entering 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/Expenses** topic tab in the lower-left pane of the main window. If a different topic tab is currently active (**bold**), click the **Payments/Fees/Expenses** topic tab.

Right-click in the list area, and then choose **Add Expense Record...** from the popup menu. A new Expense 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

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