Add a Pool Vehicle

Last Modified on 19/02/2021 3:35 pm GMT

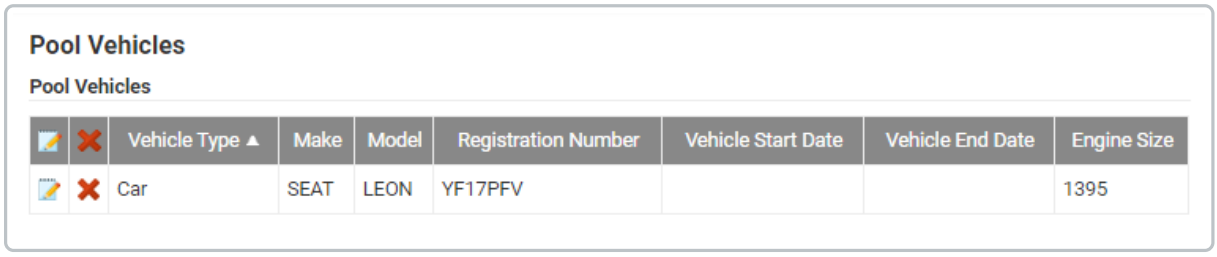
Permissions

You will require the following permissions:

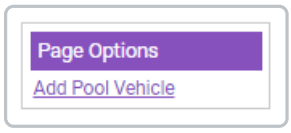
- Base Information
- Pool Vehicles

Add a Pool Vehicle

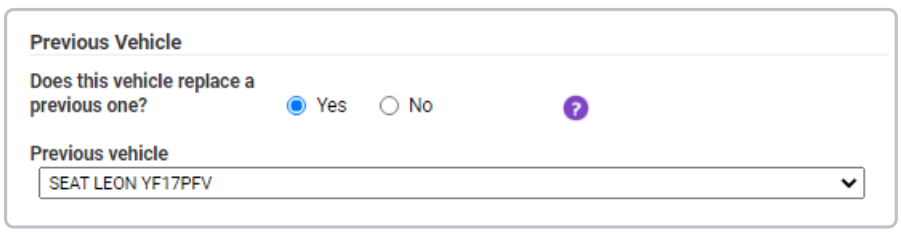
1. Navigate from the **Home** page to **Administrative Settings | Base Information | Pool Vehicles**. A list of all Pool Vehicles you have access to will be displayed.



2. From the 'Page Options' menu, click **Add Pool Vehicle**. The Add / Edit Pool Vehicles window will appear.

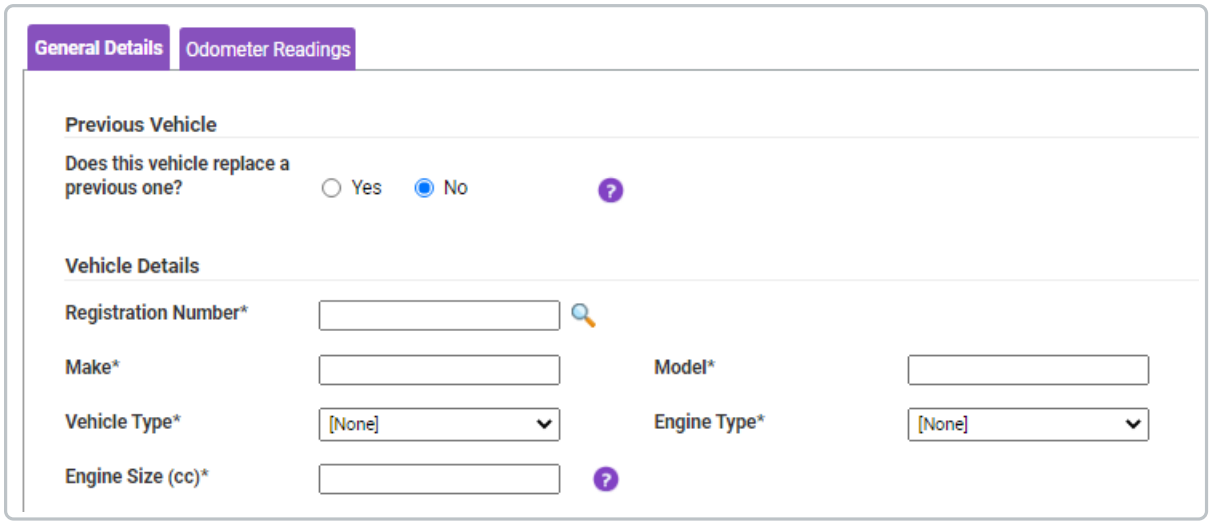


3. In the Previous Vehicle section, select whether or not this vehicle replaces a previous one.
    - If you select **Yes**, a new drop-down list will display that allows you to select the vehicle you wish to replace.



    - If you select **No**, continue with the rest of the process.

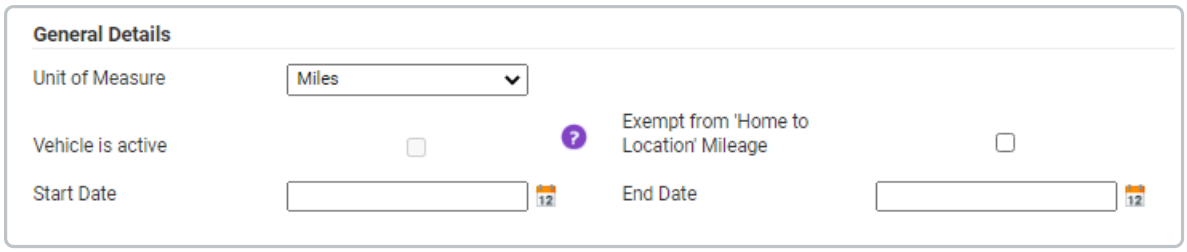
4. Complete the **Vehicle Details** section:



Field	Description
Registration Number	Enter the registration number of the vehicle and click 🔍 to perform a vehicle lookup and retrieve the Make, Model, Vehicle Type, Engine Type and Engine Size, where possible. All fields can still be modified if required. **Note:** In some instances, the Make and Model may not be found and will need to be entered manually.
Make	Enter the make of your vehicle. For example, Ford or BMW.
Model	Enter the model of your vehicle. For example Fiesta or 320d.
Vehicle Type	Select the type of vehicle from the list.
Engine Type	Select the vehicle's engine type. For example, Petrol or Diesel.
Engine Size	Enter the vehicle's engine size. **Note:** It is important you select the correct Unit of Measure and Engine Type as this will ensure correct reimbursement for the distanced traveled. Additionally, please make sure you enter the Engine Size in cubic centimeters (cc); for example 1198 instead of 1.2.

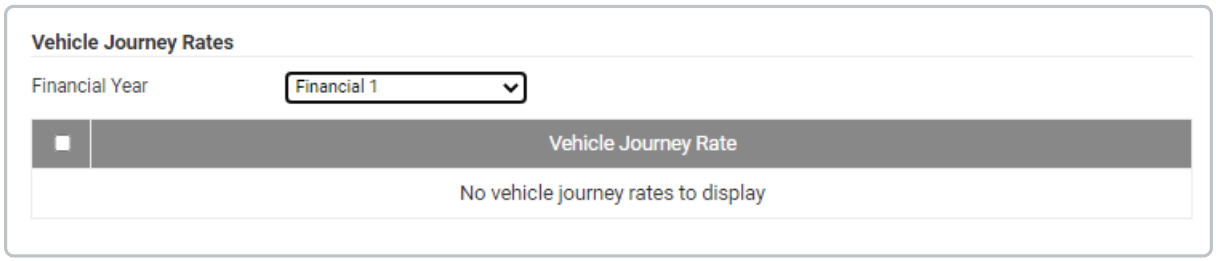
Note: Depending on your choice, some fields will become unavailable. For example, selecting Bicycle will disable the Engine Size (cc) and Registration Number. Selecting Bicycle will still require you to select an Engine Type, otherwise you cannot create a Vehicle Journey Rate for bicycles. You can create a vehicle engine type for bicycles within the Vehicle Engine Types menu. For further guidance, view Manage Vehicle Engine Types.

5. Complete the **General Details** section:



Field	Description
Unit of Measure	Select a Unit of Measure from the drop-down list. **Note:** It is important you select the correct Unit of Measure and Engine Type as this will ensure correct reimbursement for the distanced traveled.
Vehicle is active	Select the Vehicle is Active check box to ensure it can be used for claims.
Exempt from 'Home to Location' Mileage	Select the check box to restrict the vehicle from being used to claim home to location mileage.
Start Date	Add the Start Date of vehicle usage if applicable.
End Date	Add the End Date of vehicle usage if applicable.

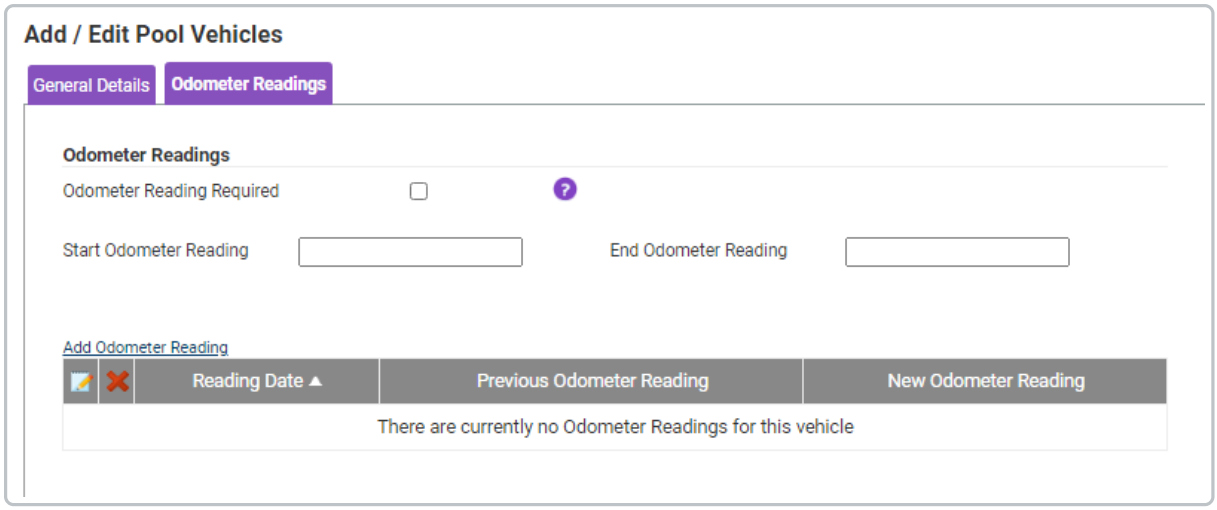
6. Select the appropriate **Vehicle Journey Rate** from the available selection. This will determine the rate of reimbursement the claimant will receive for journeys in this vehicle.



7. Enter any other information as required and click **Save** to store the information.

Odometer Readings

1. Click the **Odometer Readings** tab in order to enter the correct odometer details for this pool vehicle.



2. Select the **Odometer Reading Required** check box if the claimant must provide an odometer reading for each active vehicle that mileage/fuel is being claimed against. Further options are configurable for this feature which can be found in **Administrative Settings | Tailoring | General Options | General Details | Odometer Options**. For more information, view General Options - General Details.

3. Enter the **Start/End Odometer Readings** into the relevant fields if required.

4. Click **Add Odometer Reading** to add any further Odometer Readings that you wish to record. The **Add Odometer Reading** link will display a pop-up modal that allows you to enter the **Reading Date**, **Old Reading** and **New Reading**.

5. Click **Save** to store any changes.