

Fuel Card Mileage - Feature Overview

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Overview

Fuel cards can be reconciled using the Assure Expenses website as well as on Assure Expenses Mobile. Assure Expenses provides the ability to upload an electronic card statement and the system will allocate transactions spend from the statement to the relevant claimants. The claimant can apportion the fuel card items and match to an item that already exists in the claim or create an entirely new expense.

Fuel Card mileage expense items can be tailored to your organisation's requirements in order to adhere to how you manage fuel card payments and reconciliation. After claim submission, odometer readings allow Assure Expenses to calculate the difference between total miles and business miles in order to determine if any personal mileage was undertaken. Once calculated, the value can then be deducted or added to a claim accordingly.

Benefits

- **Fuel Card Reconciliation** - Reconciliation of expenses with card statements provides a greater level of reliability and accuracy, assisting the approval process.
- **Personal Mileage Deductions** - Ensure personal miles are correctly applied and accounted for to ensure accurate reimbursement.
- **Greater Claim Control** - Configuration of claim restrictions allows administrators to manage and simplify the claim process.
- **Auditable Information** - Historical record of fuel card statements, displaying both reconciled and unreconciled transactions.

Features

Feature	Description
Add Fuel Cards	Add multiple fuel cards
Import Statements	Import electronic statements into Assure Expenses
Claim/Statement Reconciliation	Link statements to employee records to allow transaction matching
Configure Claim Restrictions	Set claimant expense restrictions based on statement information
Tailorable Expenses	Configure fuel card mileage expense items as required
Audit Log	Full searchable audit trail of employee transactions

Implementation

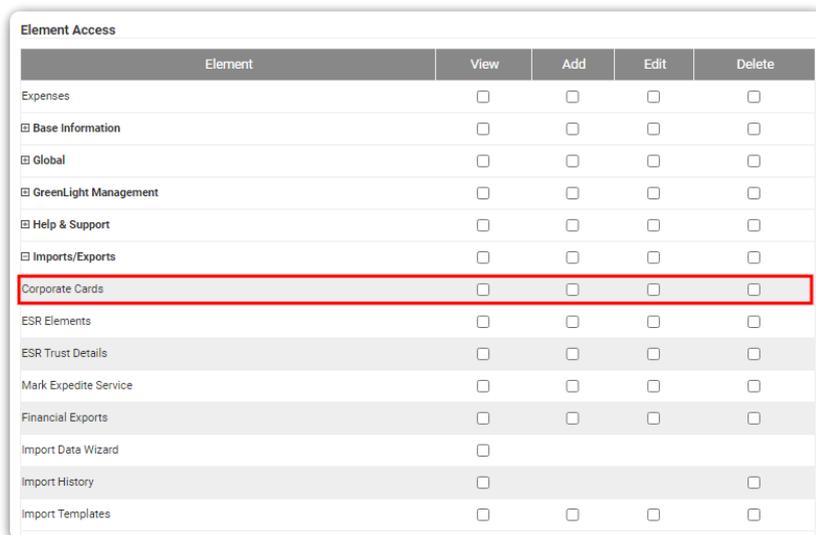
1. For an administrator to fully configure fuel card mileage within your system they will require the following permissions on their (<http://expenses.knowledgeowl.com/help/access-roles-feature-overview>). " data-original-title="" data-toggle="popover" title="">Access Role:

- Imports/Exports (Corporate Cards)
- Base information (Expense Items)
- User Management (Employees)

■ Navigate from the Assure Expenses Homepage to **Administrative Settings | User Management | Access Roles**.

■ Click  next to the Access Role that you want to create the permissions for.

■ Scroll down to Imports/Exports and select the check boxes for Corporate Cards.



Element	View	Add	Edit	Delete
Expenses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▣ Base Information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▣ Global	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▣ GreenLight Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▣ Help & Support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▣ Imports/Exports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Corporate Cards	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ESR Elements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ESR Trust Details	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mark Expedite Service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Financial Exports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Import Data Wizard	<input type="checkbox"/>			
Import History	<input type="checkbox"/>			<input type="checkbox"/>
Import Templates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

■ Scroll down to Base Information and select the check boxes for Expense Items.

Element Access					
Element	View	Add	Edit	Delete	
Expenses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Base Information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Advances	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Allowances	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Cost Code(s)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Countries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Currencies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Departments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Expense Categories	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Expense Items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Expenses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Organisations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
P11D	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Pool Vehicles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Project Codes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Reasons	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Vehicle Engine Type	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Vehicle Journey Rate Categories	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Views	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

- Scroll down to User Management and select the check boxes for Employees.

Element Access					
Element	View	Add	Edit	Delete	
Expenses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Base Information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Global	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> GreenLight Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Help & Support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Imports/Exports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Miscellaneous	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Policy Information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Reports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> System Options	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Tailoring	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Torch	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> User Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Access Roles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Approval Matrix	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Authoriser Levels	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Budget Holders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Vehicles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Employee Bank Accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Groups	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Item Roles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Teams	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

2. Configure your fuel card providers. For more information, view [Add a Corporate Card Provider](#).
3. Import your first fuel card statement and allocate unmatched card numbers to the appropriate employees. For information on how to do this, view [Import a Corporate Card Statement](#).

4. Fuel card mileage expense items can be configured in different ways in order to meet your organisation's needs. For an in-depth guide on the different methods of setting up fuel card mileage expense items, view [Configure Fuel Card Mileage](#).
5. Once this has been done, claimants will be able to reconcile their fuel card transactions from the imported statement or add expenses manually. Information for this can be found in the 'Links' section below.

Links

Frequently Asked Questions	Mileage FAQs
Administrator - Corporate Cards	Add a Corporate Card Provider Import a Corporate Card Statement Match a Corporate Card to an Employee View Corporate Card Transactions Configure Fuel Card Mileage Create an Expense Item Add a Claimant's Vehicle
Claimant	Add an Expense Submit a Claim Reconcile a Corporate Card Transaction Reconcile a Corporate Card Transaction (Expenses Mobile)
