

Configure Fuel Card Mileage

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Method 1 - Deduction Before Payment

Method 2 - Deduction After Payment

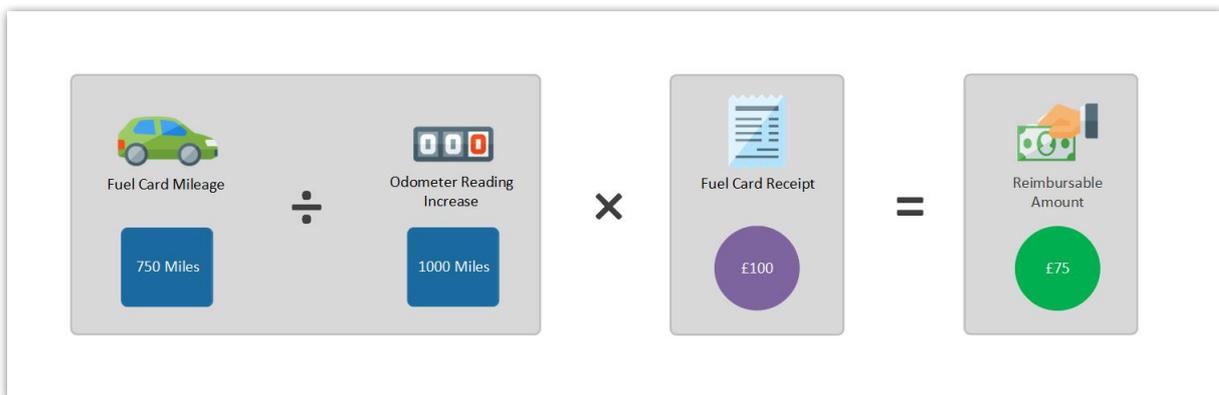
Permissions

You will require an Access Role with the following permissions:

- Base Information (Expense Items)
- User Management (Employees)

Method 1 guides you on how to configure Assure Expenses in order to deduct personal mileage from a fuel card claim to ensure only the value of business miles travelled is reimbursed.

- You will need to create two expense items:
 - Fuel Card Mileage
 - Fuel Card Receipt
- Vehicle odometer readings must be made mandatory when submitting a claim. This will allow Assure Expenses to calculate the difference between business miles and total miles travelled during the period, in order to reimburse the correct proportion of the fuel card spend that was used for business miles. The diagram below displays an example calculation that would occur after claim submission:



Create Fuel Card Mileage Expense Item

To configure the fuel card mileage expense item, follow the steps below:

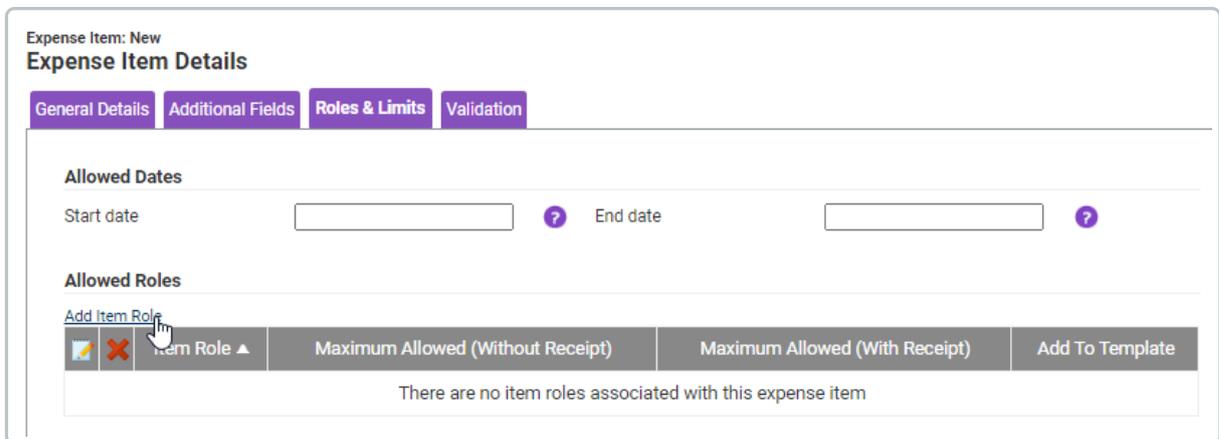
1. Navigate from the **Home** page to **Administrative Settings | Base Information | Expense Items**.

2. Click **New Expense Item**. For more information on creating an expense item, view [Create an Expense Item](#).
3. Within the General Details section, ensure the **Reimbursable** check box is selected.
4. Ensure that 'Item Type' field is set to **Mileage (Based on Fuel Receipt)**.



The screenshot shows a form section titled "Calculation". Below the title, there is a label "Item Type" followed by a dropdown menu. The dropdown menu is currently set to "Mileage (Based on Fuel Receipt)".

5. Within the 'Roles & Limits tab', add the expense item to an Item Role as required.



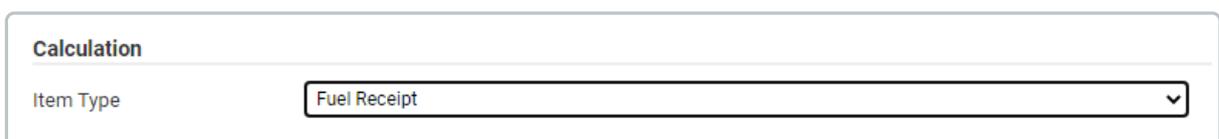
The screenshot shows the "Expense Item: New" form, specifically the "Expense Item Details" section. The "Roles & Limits" tab is selected. Under the "Allowed Roles" section, there is a button labeled "Add Item Role" with a plus icon. Below this button, there is a table with three columns: "Item Role", "Maximum Allowed (Without Receipt)", and "Maximum Allowed (With Receipt)". The "Item Role" column is currently empty, and a message below the table states "There are no item roles associated with this expense item".

6. Click **Save** to store the expense item.

Create Fuel Card Receipt Expense Item

To configure the fuel card receipt expense item, follow the steps below:

1. Navigate from the **Home** page to **Administrative Settings | Base Information | Expense Items**.
2. Click **New Expense Item**. For more information on creating an expense item, view [Create an Expense Item](#).
3. Within the General Details section, ensure the **Reimbursable** check box is cleared.
4. Ensure that 'Item Type' field is set to **Fuel Receipt**.



The screenshot shows a form section titled "Calculation". Below the title, there is a label "Item Type" followed by a dropdown menu. The dropdown menu is currently set to "Fuel Receipt".

5. Within the Roles & Limits tab, add the expense item to an Item Role as required.

The screenshot shows the 'Expense Item Details' form with the 'Roles & Limits' tab selected. The 'Allowed Dates' section has 'Start date' and 'End date' fields, each with a help icon. The 'Allowed Roles' section has an 'Add Item Role' button and a table with columns: 'Item Role', 'Maximum Allowed (Without Receipt)', 'Maximum Allowed (With Receipt)', and 'Add To Template'. The table is currently empty, with a message below it stating 'There are no item roles associated with this expense item'.

6. Click **Save** to store the expense item.

Make Odometer Readings Mandatory

To enforce the input of an odometer reading when a claim is submitted, follow the steps below:

1. Navigate from the **Home** page to **Administrative Settings | User Management | Employees**.
2. Search for the employee record that you want to modify using the **Search Options** on the Employees page. Click  to edit the employee.
3. Click **Vehicle** within the Page Options menu.
4. Click  next to the employee's active vehicle.
5. Click the **Odometer Readings** tab and select the **Odometer Readings Required** check box to ensure that an odometer reading is provided when submitting a claim.

The screenshot shows the 'Odometer Readings' form. The 'Odometer Reading Required' checkbox is checked. Below it are 'Start Odometer Reading' and 'End Odometer Reading' fields. The 'Start Odometer Reading' field contains the value '0'. There is a help icon next to the 'Odometer Reading Required' checkbox.

Claim Example

This section describes what information a claimant will need to provide in order to deduct personal miles from a fuel card claim.



1. Create a new claim or navigate to an existing claim. For more information on creating a claim, view [Create a Claim](#).
2. Add the Fuel Card Mileage expense item, specifying the number of miles travelled for business.

Fuel Card Mileage Example

VAUXHALL CORSA (FY14) + [Add new vehicle](#)

Mileage ?

3. Add the Fuel Card Receipt expense item, specifying fuel card expenditure.

Fuel Card Receipt Example

Please Note: This item will NOT be reimbursed

Total (Gross): ?

4. Click **Submit Claim**.

Note: The amount payable is based on your vehicle journey rate and will change after claim submission when Assure Expenses calculates the personal mileage deduction.

5. Enter a new odometer reading and click **Save**.
6. Assure Expenses will calculate fuel card mileage and the reimbursable amount will be displayed.