Configure Fuel Card Mileage

Last Modified on 12/01/2023 3:18 pm GMT

Method 1 - Deduction Before Payment	Method 2 - Deduction After Payment

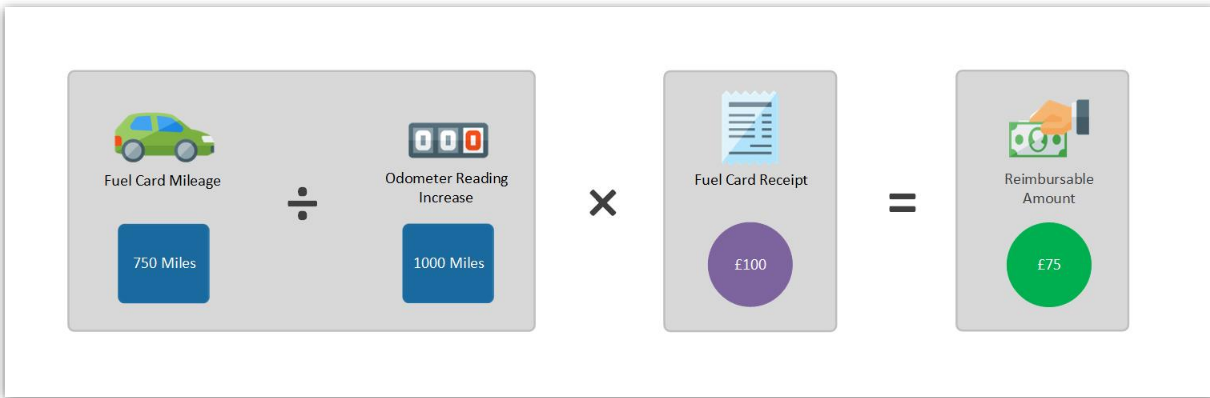
Permissions

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

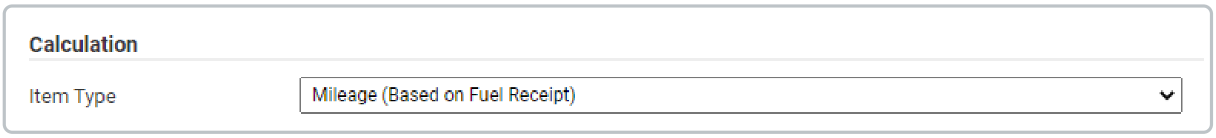
To configure the fuel card mileage expense item, follow the steps below:

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

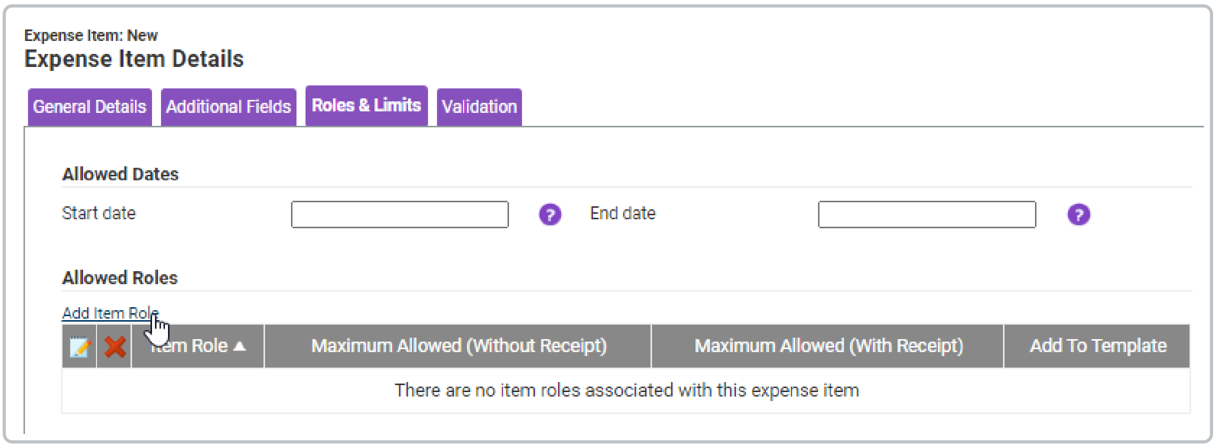
2. Click **New Expense Item**. For more information on creating an expense item, viewCreate an Expense Item.

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)**.



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



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

Create Fuel Card Receipt Expense Item

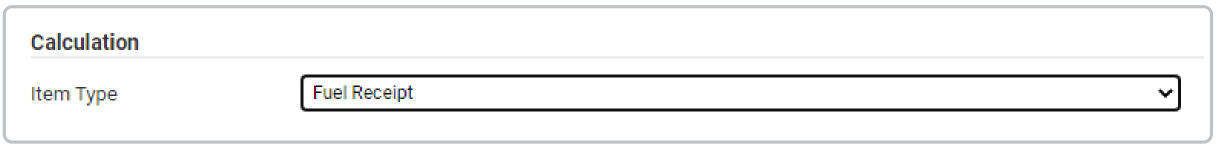
To configure the fuel card receipt expense item, follow the steps below:

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

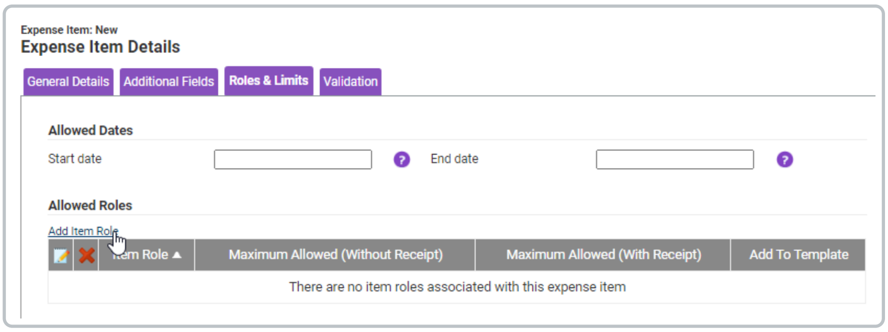
2. Click **New Expense Item**. For more information on creating an expense item, viewCreate an Expense Item.

3. Within the General Details section, ensure the**Reimbursable** check box is cleared.

4. Ensure that 'Item Type' field is set to**Fuel Receipt**.



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



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:

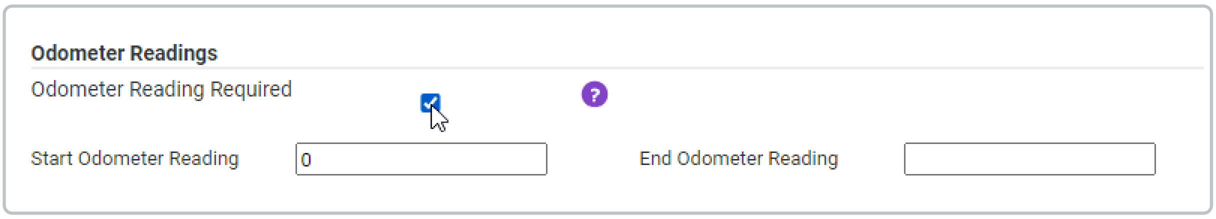
1. Navigate from the **Home** page to **Administrative Settings** | **User Management** | **Employees**.

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.

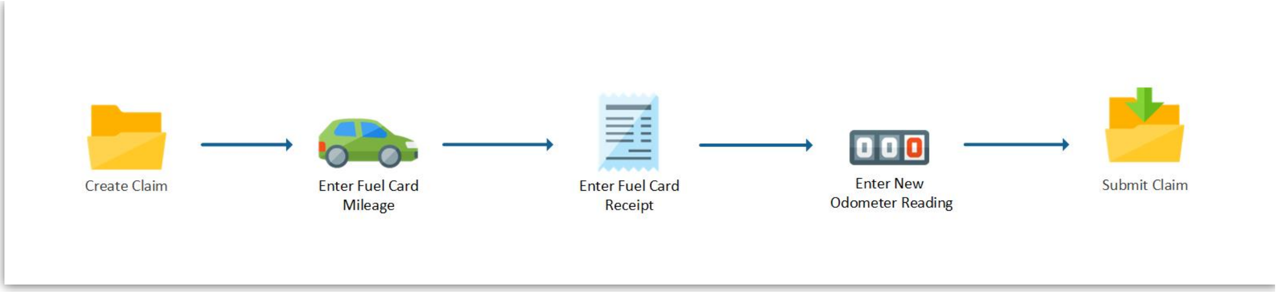
4. Click next to the employee's active vehicle.

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.



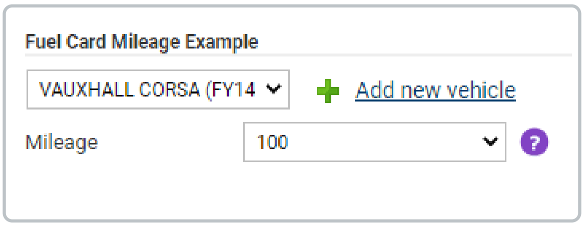
Claim Example

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

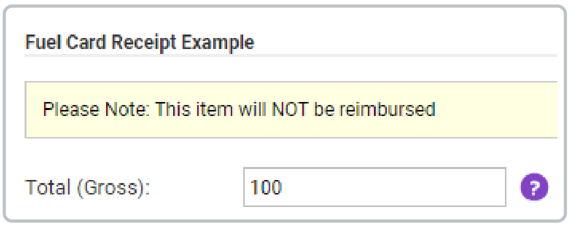


1. Create a new claim or navigate to an existing claim. For more information on creating a claim, view Create a Claim.

2. Add the Fuel Card Mileage expense item, specifying the number of miles travelled for business.



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



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.