

Configure Fixed Mileage Deduction

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Permissions

You will require an Access Role with the following permissions:

- Base Information (Expense Items)

This article explains how to configure an expense item to be a fixed mileage deduction that will occur daily. Claimants will only be eligible for reimbursement when they exceed the mileage amount that you have configured.

For example: If you set the fixed mileage deduction amount to be 20 miles and a claimant claims 15 miles on day one, they will not be entitled to a payment for that day. If the claimant then claims 22 miles on day two, then they will be entitled to 2 miles payment for that day.

Two expense items must be created in order to apply a fixed mileage deduction. The first expense item created is only used as a placeholder calculation for the second item and therefore should not be available to select. The second item is what you want the claimant to claim for, so it must be assigned to the correct Item Roles.

Expense Item 1

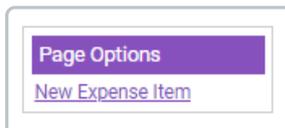
1. Navigate from the **Homepage** to **Administrative Settings | Base Information | Expense Items**

Expense Items

1 2 3 4 5 ≥ >> filter

|   | Expense Category ▲ | Expense Item | Expense Item Description |
|---|--------------------|-----------------------------|--------------------------|
|   | 1 Of Each | StandardItem | |
|   | 1 Of Each | Pencer Per Mile | |
|   | 1 Of Each | Meal | |
|   | 1 Of Each | Daily Allowance | |
|   | 1 Of Each | Fuel Receipt | |
|   | 1 Of Each | Mileage (Fuel Receipt) | |
|   | 1 Of Each | Fixed Allowance | |
|   | 1 Of Each | Fuel Card Mileage | |
|   | 1 Of Each | Item Reimburse | |
|   | 1 Of Each | Fixed Excess Mileage | |
|   | 1 Of Each | Fixed Mileage Deduction | |
|   | 1 Of Each | Hotel std item | |
|   | 1 Of Each | ToAndFrom | |
|   | 1 Of Each | SplitItem | |
|   | 1 Of Each | ToandFromWithoutJourneyGrid | |

2. Within the 'Page Options' menu, Click **New Expense Item**. This will be the first of two expense items that will need to be created and will be the item that is performing the calculation. It should not be assigned to an Item Role and therefore it will not be selectable by claimants.



3. Name the expense item and select an expense category, making sure that the **Reimbursable** checkbox is selected.

Expense Item: New
Expense Item Details

General Details | Additional Fields | Roles & Limits | Validation

General Details

Expense Item: Expense Item Abbreviated: ?

Expense Category:

P11D Category:

Account Code: ? Alternate Account Code:

Description:

Comment:

Total entered as: Reimbursable:

4. Within the 'Calculation' section, ensure that the 'Item Type' field is set to **Fixed Mileage Deduction**.

Calculation

Item Type:

5. Click **Save**.

The next stage in this setup will be to create the second expense item that claimants will claim their mileage on.

Expense Item 2

1. This is the expense item that the claimant will need to select when claiming their mileage. Within the 'Page Options' menu, click **New Expense Item**.

Page Options

[New Expense Item](#)

2. Name the expense item and select an expense category.

Expense Item: New
Expense Item Details

General Details Additional Fields Roles & Limits Validation

General Details

Expense Item Expense Item Abbreviated ?

Expense Category ▼

P11D Category ▼

Account Code ? Alternate Account Code

Description

3. Within the 'Calculation' section, change the 'Item Type' field to **Mileage (Pence Per Mile)**. Once selected, the 'Fixed Mileage Deduction' section will appear.

Calculation

Item Type ▼

Force Vehicle Journey Rate Category ▼

Increase vehicle journey rate for passengers Enable Relocation Mileage

Increase vehicle journey rate for heavy bulky equipment

4. Within the 'Fixed Mileage Deduction' section, select **Force Fixed Mileage Deduction**. Once selected, the 'Number of Miles' and 'Daily Deduction Item' fields will appear.

Fixed Mileage Deduction

Force Fixed Mileage Deduction Number of Miles

Daily Deduction Item ▼

5. Enter the number of miles to deduct and then select the first expense item that you created from the 'Daily Deduction Item' field.

Note: The number of miles is the amount a claimant must exceed before they are eligible to be reimbursed.

6. Continue to configure the expense item as appropriate using the tabs at the top of the 'New Expense Item' page. For a high-level overview, visit [Create an Expense Item](#).

Note: You will need to assign the second expense item you have created to the correct Item Roles so that claimants will be able to select it.

7. Click **Save** to store the changes and return to the Expense Items menu.

The Claimant's View

We have added this section in to ensure that what you have configured is correct from the claimant's perspective.

| Expense Items | | | | | | | | | | | | | |
|---------------|--|--|--|-------------------|-----------------|------------------------|--------|---------------|-------|-------|---------|----------------|--|
| | | | | | | | | | | | | | |
| | | | | Number of Miles ▲ | Date of Expense | Expense Item | Reason | Other Details | NET | VAT | Total | Amount Payable | |
| | | | | -25.00 | 22/02/2021 | Site Mileage Deduction | | | £0.00 | £0.00 | £-14.58 | £0.00 | |
| | | | | 50.00 | 22/02/2021 | Business Miles | | | £0.00 | £0.00 | £29.15 | £0.00 | |
| | | | | 25.00 | | | | | £0.00 | £0.00 | £14.58 | £0.00 | |

Note: This will appear after the claim has been submitted.

In this example, the fixed mileage deduction amount is set to 25 miles. The claimant has selected the 'Business Miles' expense item (Expense Item 2 within configuration) and claimed 50 miles. The 'Site Mileage Deduction' item (Expense Item 1 within configuration) will show the amount of miles that are to be deducted, updating the 'Total' and 'Amount Payable' columns.

If claimants are not seeing this configuration, we recommend you follow the configuration steps above one more time to ensure that the expense items are working as intended.