Using Fleet Finance Manager

This documents describes how to use Fleet Finance Manager Software. Please visit www.shappstech.com to download latest version of the software or for further information.

Five Easy steps to start using Fleet Finance Manager

1. Enter Fleet Operator details.
2. Add your Fleet drivers.
3. Add your Fleet Vehicles.
4. Maintain day to day activities/travels of your fleet vehicles.
5. Generate financial, vehicle or driver specific reports in a clear printed format (also as PDF)

Step 1 • Enter your Company details

Step 2 • Add your Fleet Drivers

Step 3 • Add your Fleet Vehicles

Step 4 • Add Envelopes

Step 5 • Generate Financial Reports

Before Installing Fleet Finance Manager:

IMPORTANT

Please use 'D:' drive or a location where you have write permission to install Fleet Finance Manager.

Fleet Finance Manager stores the database in the installation directory, therefore, having write permission to that folder is important.

Normally, installing in the default location of 'C:\Program Files (x86)' will require you to run the application as an Administrator since write access is not allowed by default in that location. If you don't want to run the application as an administrator:

1. Either install the application to D: drive, or My Documents, or a folder with write permission.

2. Or Run the application by Right Clicking on the shortcut and selecting 'Run As Administrator'

Running Fleet Finance Manager:

After installing the Fleet Finance Manager Software using the Setup program, you will see the shortcut icon will appear in the Start Menu.
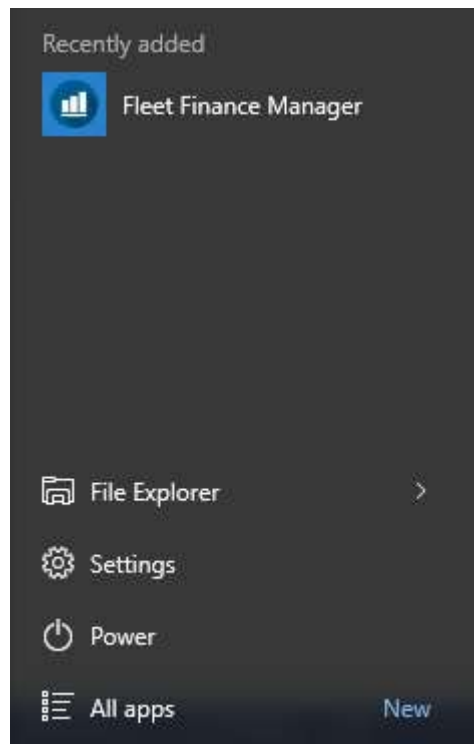
Click on the link to start Fleet Finance Manager.

Fleet Finance Manager Main Screen:

Once started, you will see the 'Main Screen' of Fleet Finance Manager. You can access to all the features through this screen.

The software is divided into three key sections:

1. **Profile Management**
   - You can enter your company details, fleet drivers, fleet vehicles and maintenance records here.
2. **Data Management**
   - You can enter day to day activities here like daily trips, vehicle expenses, etc.
3. **Reports Generation**
   - You can generate and view Reports for either vehicles or drivers or simply your income

All these functionalities are arranged in a natural sequence. When you first use the software, you will be going through each section and enter the information in the same sequence too.

Step 1: Enter your company details

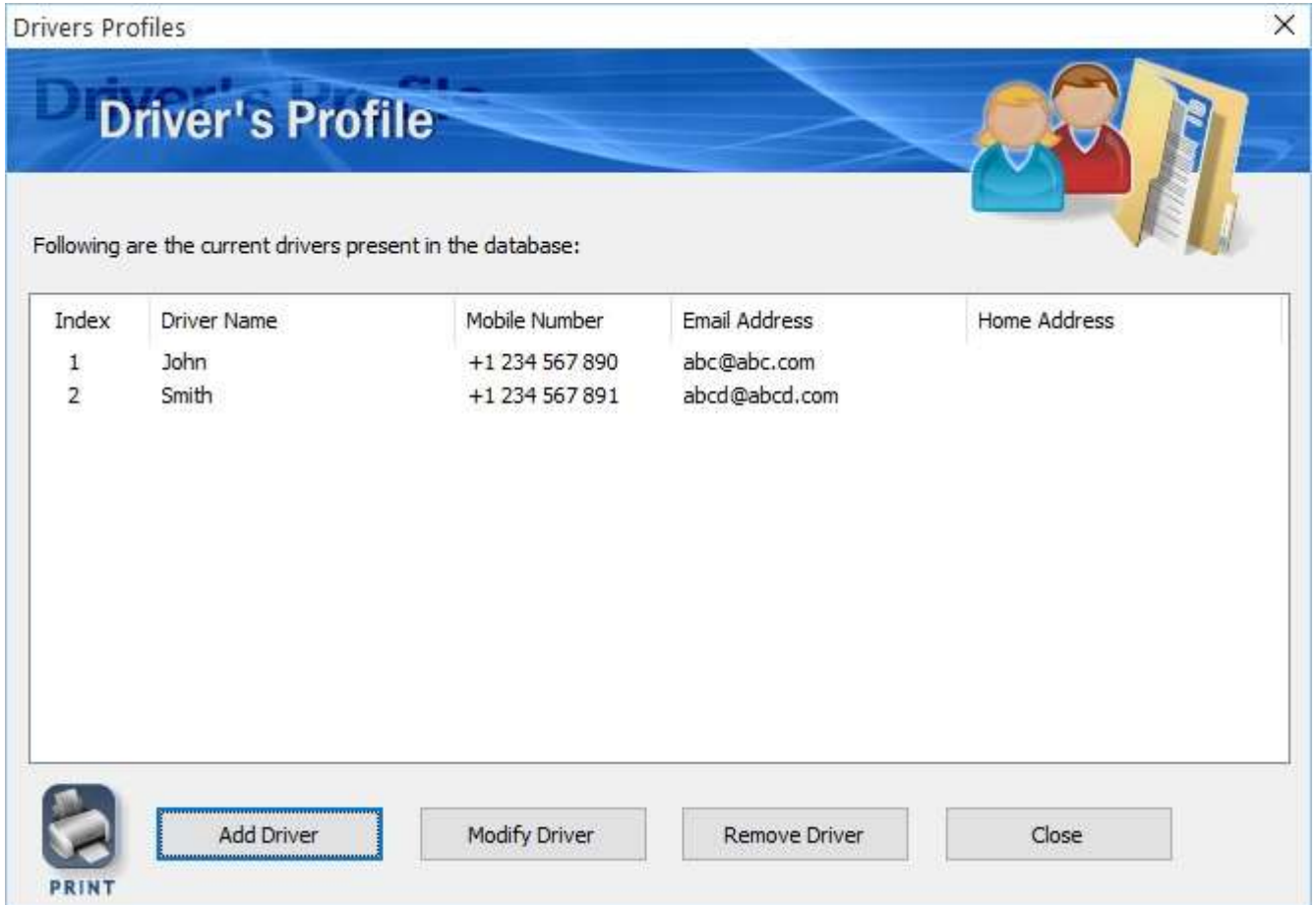Click on 'Operators Profile' button in the Main Screen to open this window.

Enter your company details here. Fields with a * next to them are required. You can't save the form without entering anything in these fields.

The information you enter here is used in Report Generation. The information is also displayed in the printed 'pdf' files.

Step 2: Enter your Fleet drivers

As a fleet, you will have a number of drivers in your fleet. Click on 'Driver's Profile' button on the Main Screen to open this window.
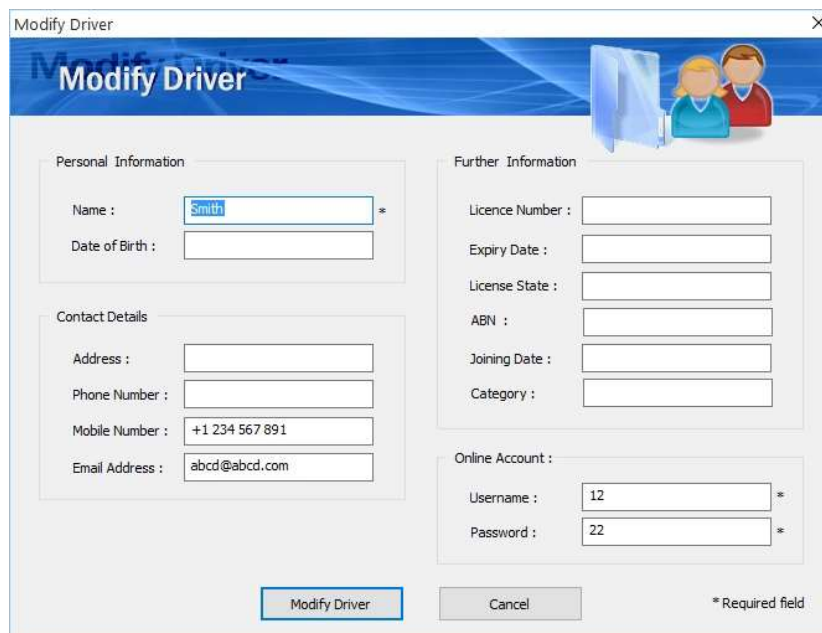
The above screen display's all your drivers that you have entered. Click 'Add Driver' Button to add a new driver. You can also modify any driver details or remove them also.

Step 3: Enter your Fleet Vehicles

Click on 'Fleet Vehicle Profiles' to view this window. Here you will enter all your vehicles in your fleet. You can also select if a vehicle is active or not. Again, only fields with * are required, but you can enter more information if you need.
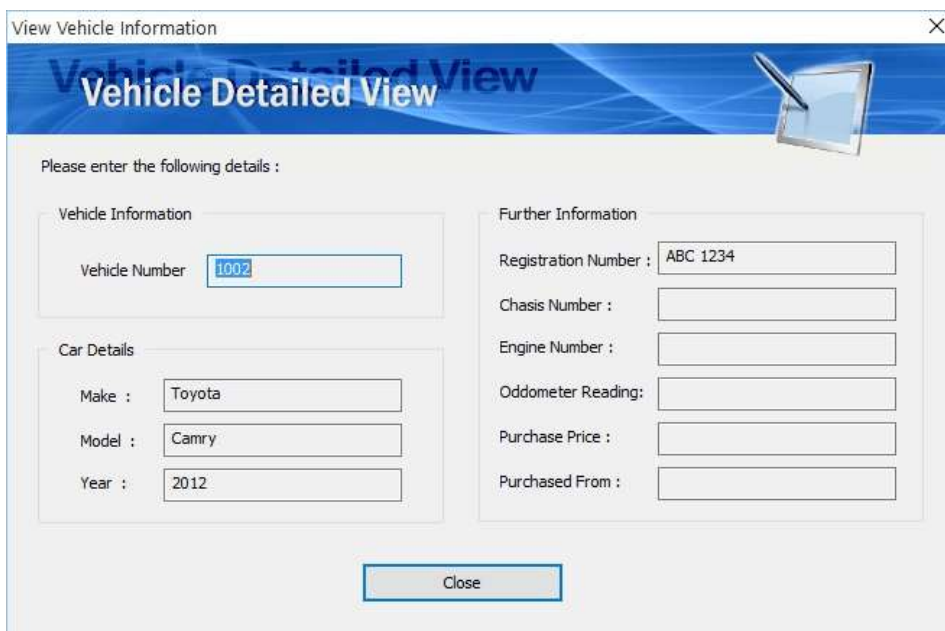

This window has been designed very similar to 'Driver's Profile' window to keep the software user friendly.

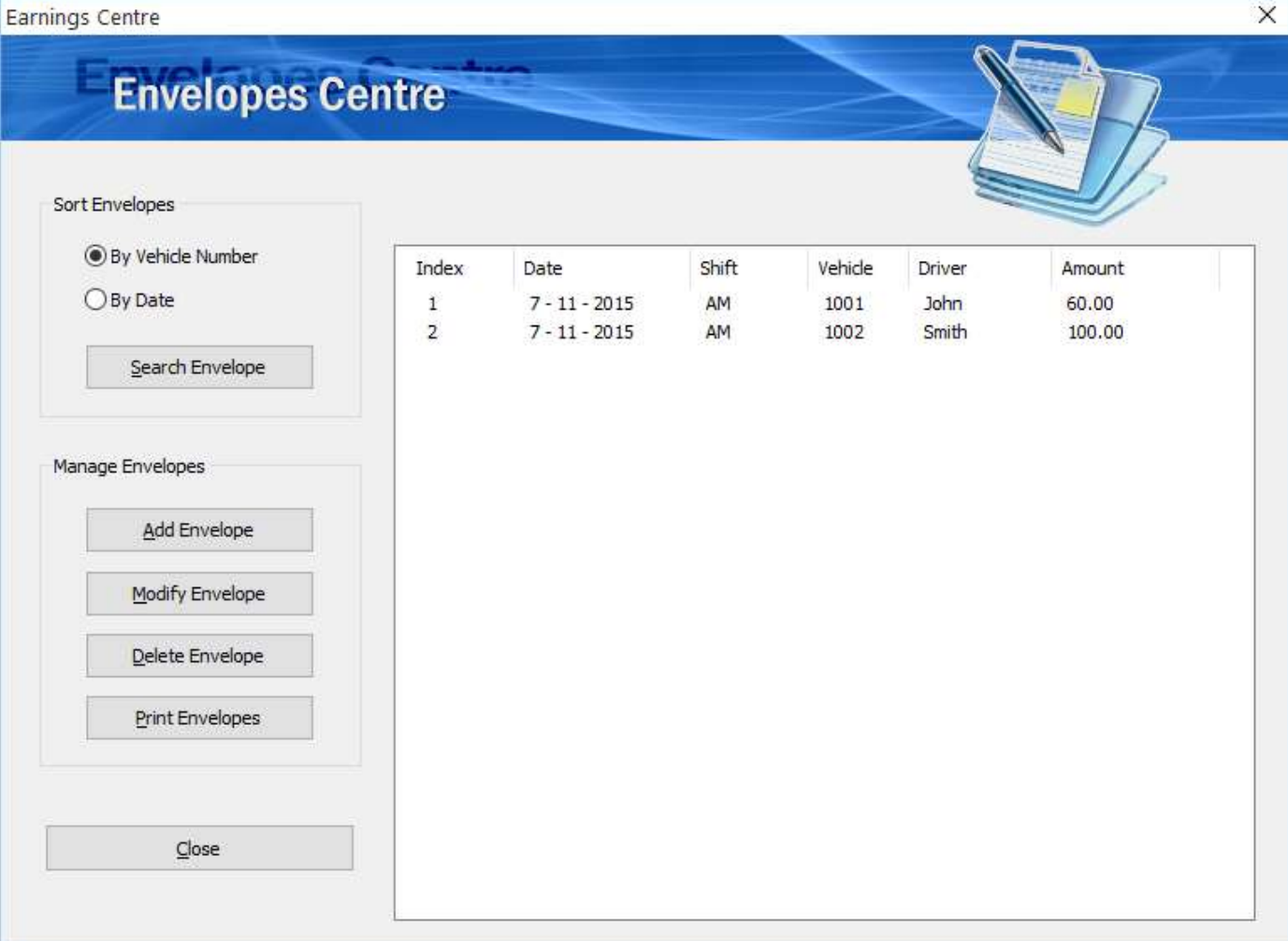You can Add new vehicles, modify them or remove them in this window.

Step 4: Maintain day to day activities/travel of your vehicles

In this section, you will learn how to add and maintain day to day activities of your vehicles. You do this in the 'Earnings Centre'. It's important to understand the concept of an envelope.

An envelope is a single entry of a trip/activity of one of your fleet vehicle. For example, a vehicle '1001' driven by driver 'John' goes from point A to point B and costs/earns $200. This will be entered as a single envelope.

Click 'Add Envelope' button to open the Add Envelope window. Here you can enter the details of the trip. Some fields will automatically populate like list of 'vehicles' and 'drivers'. You can later modify an envelope too through the Earnings Centre.

Information entered in each envelope is used for 'Report Generation'. The software is designed to keep data/information entering very simple. Therefore, you are only have to enter information in the envelopes, to capture your vehicles' trip/activity. Later in Report Generation, the software can automatically extract information from vehicles, drivers, or dates from the envelopes seamlessly. Hence, there's only one point of information gathering which keeps the software very simple.

Please note, you can also enter vehicle maintenance related expenses or business expenses in other sections, which are also captured by the 'Report Generation'.

You can enter as much information as you like in each envelope but only fields with * are required. Any information not captured by normal fields can be entered in the 'Misc Details' section.

Vehicle related expenses can be entered here. You can also print the information by clicking the 'print' icon.

Step 5: Generate Financial Reports

The end result is to generate financial reports for your business. Fleet Finance Manager provides three different types of report generation:

1. Driver's GST Calculator
   - Calculates income per driver in the given time period, which is used to calculate GST.
2. Earning per Vehicle
   - Calculates income per vehicle in the given time period.
3. Operator's Earning
   - Calculates total income by the operator in the given time period.

Click on 'Reports Centre' button on the Main Screen to open this window.

Reports are generated based on the time period that you enter. Therefore, you to select a 'Start Date' and 'End Date' for each report. This gives you the flexibility of generating reports suitable to your business timeframe.

Printing Reports

Each report can be printed to either an actual printer or simply to a 'pdf' file. To print a report, simply click on the 'Print' button and select the printer you wish to use.

The Fleet Finance Manager software prints the reports in a clear format which also includes your business details that you entered in the 'Operator's Profile' window.

To print in pdf, you will need to have a pdf printer installed in your computer.

Please note that Windows 10 features native support for PDF files, including the ability to 'print' documents straight to PDF. So, if you are using Windows 10, you don't have to install any PDF printer, as you will have this option by default. Otherwise you can install a pdf printer like 'Nova pdf' or similar.

The following is how a printed Tax Invoice 'Driver's Total Earnings' looks like:

TAX INVOICE

Business Name: Alpha Co

Business ABN: 123 456 789

Phone No: 012 345 678

Address: Company Street Address

Vehicle Shift Details				Driver Details	
Date	Vehicle	Shift	Amount		
7 - 11 - 2015	TX 1001	AM	30.00	Name: John	
				ABN:	
				Address: 1 Some Street	
Start Date:	1 - 11 - 2015				
End Date:	8 - 11 - 2015				
		Driver's Earning:	30.00		
		Driver's GST:	2.73		

The following is a printed 'Total Earning's per Vehicle':

Alpha Co

Business Name: Alpha Co

Business ABN: 123 456 789

Address: Company Street Address

Phone No: 012 345 678

Vehicle: " 1002" Total Earning			
Date	Driver	Shift	Amount
7 - 11 - 2015	Smith	AM	100.00
Start Date:	1 - 10 - 2015		
End Date:	8 - 11 - 2015		
		Vehicle Earning:	100.00

Support

We hope that the above guide will get you started in using the Fleet Finance Manager. If you would like to provide any comments or need any assistance, please contact us at:

Website: www.shappstech.com

Email: shapps@msn.com

Thank you for using Fleet Finance Manager.