

QuickTouch: Fleet Account Management

A “Fleet Account” is generally a customer who owns multiple vehicles that require more frequent servicing, such as delivery services, taxis, local government vehicles, etc. In return for their business, a fleet account will often try to negotiate a discount or ask to be billed monthly, rather than paying at the time of sale.

Of course, the operator needs to strike a balance between profits and car count. There’s no point in increasing your car count if you’re not increasing your profits. For a new operator, the first challenge after attracting fleet accounts is distinguishing between loyal, paying accounts and those requesting hefty discounts that don’t pay their bill in a timely fashion.

QuickTouch allows you to configure any number of fleet accounts, and to easily assign vehicles to those accounts. You can specify which accounts receive a discount, and those eligible for extended credit. Accounts that are past due or exceeded their credit limit can be disabled. Accounting features allow you to track payments, view balances, and print invoices. As some accounts may require you to record certain information at the time of the sale, QuickTouch allows you to configure this required information, and to include special instructions for your technicians before they service a vehicle for fleets.

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Fleet Account Maintenance

Fleet Account Maintenance allows you to add or remove Fleet Accounts and configure many options.

Fleet Account Selection Page

From the Main Menu, choose Fleet Account Management then choose Fleet Account Maintenance.

You will be prompted with a list of your fleets. Choose a fleet account.

Note the “Add” button on this screen that will allow you to add a new fleet to the list.

Also note the “Page 1 of X” indicator. If there is more than one page of fleets, you can use the “Forward” and “Back” buttons to scroll through the screens.



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If you wish to delete a fleet, press the green DELETE button at the top of the screen.

Press OK to save any changes or CANCEL to quit without saving changes.

Fleet Name Required.

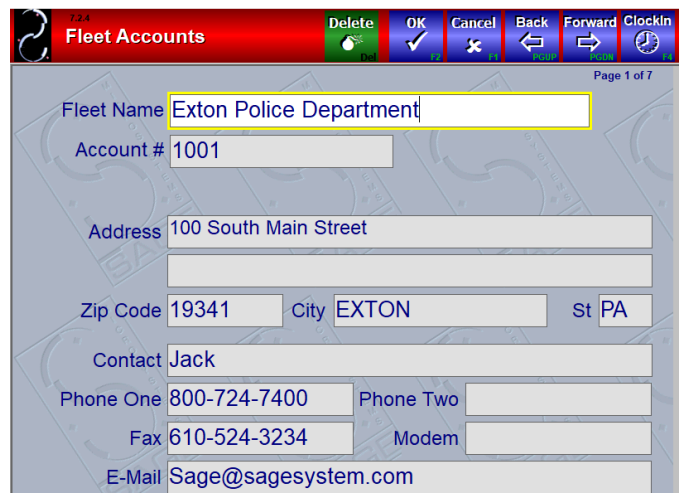
Account # Required. This needs to be unique for each fleet account. It can consist of letters or numbers.

Address, Zip Code, City, State Not required, but you want to fill this in accurately for all accounts.

Contact This is the “Attention:” field on the printed statements if bills need to be sent to a specific person or department.

Phone One Not required, but you want to fill this in for all accounts.

Phone Two, Fax, Modem, E-Mail These fields are all optional.



Fleet Type Local or National. This allows you to easily identify the fleet as Local or National but has no other effect in QuickTouch. The % Surcharge field currently has no functionality.

Ask For Reminder Period Usually NO here, as fleet accounts are generally not sent reminder cards. When you select NO, you are asked which reminder period to default to. If you leave this as YES, it will ask for a reminder period during the sale.

Allow Fleet Charge / Credit Limit This allows the fleet account to be extended credit up to the limit.

Charge Interest Generally No. This would allow you to charge interest for past due accounts, usually 1.5% per month.

Statement Type Open Items or Balance Forward. *Open Items* means that each payment received will be paid against an individual invoice or multiple invoices. This option allows you to easily find an invoice that was not paid.

Balance Forward simply allows you to apply a payment to an open balance, and the balance will then be reduced. The advantage to this is that it is quicker, the disadvantage is that you cannot determine whether a particular invoice has been paid or not.

Interest/Due Date Based on Number of Days
Open Items - each invoice is payable by X number of days after the invoice date.

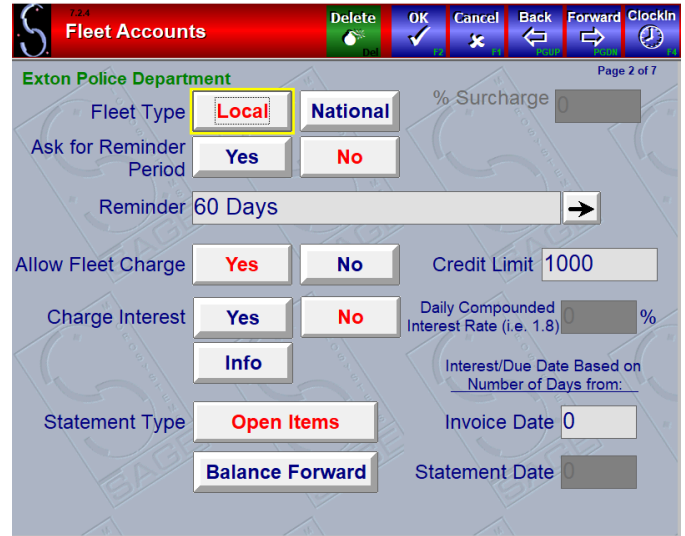
Balance Forward - a statement is sent at the end of the month, for which the entire amount is due by X number of days from the statement date.

See the Payments/Credits/Debits section to view examples.

Pricing Category Fleet accounts can be assigned to one of two pricing methods. Standard pricing will charge the fleet accounts the regular price for services. Category pricing allows four categories of fleet accounts, A, B, C and Custom %. The A, B, C categories work off predefined dollar amounts or percentages that are setup in Service Maintenance. The Custom % option gives a straight discount across the board for any Service or Part that is sold to an account.

Taxable Yes or No.

Loyalty Rewards Specify whether the Loyalty Reward system should include services performed on vehicles that are attached to this fleet account.



Pop-Up Notes You can configure a note to pop up at check-in, check-out, or both. Notes are useful to let the technicians know general information about the account vehicles, such as particular procedures to follow or services to perform or can be used as “Warning” messages to alert the shop to only allow certain vehicles to charge to the account.

General Ledger Accounts These fields are used for accounting interfaces and can be left blank.

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Statement Delivery Format Select how statements are delivered.

Include Reprinted Invoices Yes/No.

Email Address Multiple recipients can be added.

Email Invoices when Vehicle is Serviced Yes/No.

Email Address Multiple recipients can be added.

Fleet Accounts Delete OK Cancel Back Forward ClockIn
 Exton Police Department Page 4 of 7

Statement Delivery Format:

Include Reprinted Invoices:

Email Address (use ; to separate):

Email invoices when vehicle is serviced:

Email Address (use ; to separate):

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Pages 5-7 allow up to 24 “Vehicle Information” fields to be collected for the fleet vehicle at the time of service. The vehicle information fields will be printed on the Invoice.

NOTE THAT ONLY SIX LINES CAN BE PRINTED ON ANY SINGLE INVOICE. QuickTouch allows 24 fields to be configured because different fleets may have different requirements, but on any single invoice, only the first six enabled information fields will be printed. (A field is considered “Enabled” if any of the buttons are set to Yes).

Thus, it is important to conserve lines for fleets that require a lot of information – in the screenshot example, note that City, State, and Zip Code are configured to be on three different lines, but it would be just as easy to consolidate these into one “City, State, Zip” line and conserve two lines for other uses.

The vehicle information may be collected at check-in or check-out or both.

The information may also be “Required”, meaning that the cashier cannot print an invoice without supplying the required information.

The information can also be remembered, or defaulted, from the last visit.

Fleet Accounts Delete OK Cancel Back Forward ClockIn
 Exton Police Department Page 5 of 7

	Pop-up On Check-In	Pop-up On Check-Out	Required Value	Default From Last Visit
Drivers Name	<input type="button" value="No"/>	<input type="button" value="No"/>	<input type="button" value="No"/>	<input type="button" value="No"/>
Company Name	<input type="button" value="No"/>	<input type="button" value="No"/>	<input type="button" value="No"/>	<input type="button" value="No"/>
Company Address	<input type="button" value="No"/>	<input type="button" value="No"/>	<input type="button" value="No"/>	<input type="button" value="No"/>
Company City	<input type="button" value="No"/>	<input type="button" value="No"/>	<input type="button" value="No"/>	<input type="button" value="No"/>
Company State	<input type="button" value="No"/>	<input type="button" value="No"/>	<input type="button" value="No"/>	<input type="button" value="No"/>
Company Zip Code	<input type="button" value="No"/>	<input type="button" value="No"/>	<input type="button" value="No"/>	<input type="button" value="No"/>
Company Phone Number	<input type="button" value="No"/>	<input type="button" value="No"/>	<input type="button" value="No"/>	<input type="button" value="No"/>
Vehicle ID Number (VIN)	<input type="button" value="No"/>	<input type="button" value="No"/>	<input type="button" value="No"/>	<input type="button" value="No"/>

In the screenshot example, the fleet account requires that the Company Name and the Driver Name be recorded at each service. Thus, we have the Pop-up on Check-in and Pop-up on Check Out buttons set to Yes. These are also required values, and this is set to Yes. Now, the company name will always be the same for that vehicle, so this is Default from Last Visit, but there may be different drivers, so the Drivers Name field is not defaulted from last visit.

Collecting this information is important because many national fleet accounts and some local accounts may require information such as a Purchase Order or Authorization number before the vehicle is serviced. These types of information will be different for each visit by the vehicle. Many fleets will not pay the invoice if the required information is not printed directly on the invoice.

Payments/Credits/Debits

“Payments” in QuickTouch are any receivables that pay down the outstanding balance. Note that QuickTouch will always assume that the payment is a check and will look for that check to be in the cash drawer at the end of the day.

“Debits” will increase the outstanding balance for a fleet (they owe you more money). Debits are generally used for creating a starting balance, assessing a penalty, or recording a debt from a separate business unit.

Fleet Account Selection Page

Important: Any transactions done under Payments/Credits/Debits cannot be undone, they can only be offset, and so the fleet account statements will reflect all activity done on these screens.

From the Main Menu, choose Fleet Account Management then Payments/Credits/Debits. Choose a fleet account.

The Payments/Credits/Debits screen will work slightly differently depending on whether a fleet account’s statement type is Open Items or Balance Forward (page 2 of the Fleet Maintenance screen).



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Payment Are assumed to be checks, and all payments are listed as checks in the Day End Processing screens. Every payment affects the cash drawer totals for that day. A payment must be applied to an open invoice or credit, which will be listed on the bottom half of the screen.

Payments (Balance Forward Statement Type) Immediately applies to the open balance with the Balance Forward method.

Payments (Open Items Statement Type) Applies toward one or several invoices. Type in the dollar amount of the check, and then mark the “Paid” button next to each invoice it applies to. Pressing OK will apply the payment to the selected invoices, and the outstanding balance will be updated.

Apply Credits If a credit has already been created but not applied (you will be warned when you enter the Payments/Credits/Debits screen), you can use this button to apply the credit. When you create a credit, the balance is reduced, but the credit is not applied to an open invoice until you use Apply Credits.

Credit This will allow you to create a credit for an account. You will then need to go back into Payments/Credits/Debits and apply the credit to a particular invoice.

Credit (Open Items Statement type) If you create a credit for a fleet account with Open Items statement type, you will not see it as a separate line item. However, when you go into the Payments/Credits/Debits screen you will see a

Open Items Statements



Balance Forward Statements



notice “Unapplied Credits Exist”, and you will now see the Apply Credits button listed. Press the Apply Credits button, select the credit (you will see each unapplied credit listed as a separate line item), and then select the invoices or debits to apply the credit to.

Debit This will allow you to create a debit for an account. It will appear in the bottom half of the screen along with any open invoices.

Debit (Open Items statement type) If you create a debit for a fleet account with Open Items statement type, it will appear as a separate line item along with the invoices.

Discount (Only Open Items statement type) Allows you to apply a discount to an individual invoice. First, add a payment and select the invoice and you are now able to press the “Discount” key for the remaining amount, to zero out the invoice balance. This is useful for certain national fleet accounts that deduct a percentage (10%) from the invoice amount and pay the rest.

Account Inquiry

Fleet Account Inquiry allows you to view all payment, credit, debit, or invoicing activity for a particular account for any date range.

Fleet Account Selection Page

From the Main Menu, choose Fleet Account Management then Account Inquiry. Choose a fleet account.



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The only options here are to indicate the date range. This will allow you to view all fleet account activity for that date range, as well as forward and ending balances.



Print Fleet Statements

Print Fleet Statements allows you to print all payment, credit, debit, or invoicing activity for all your active fleet accounts.

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From the Main Menu, choose Fleet Account Management then choose Print Fleet Statements.

The fleet statements will print in a format that conform to #9 Standard Invoice Double Window envelopes. This will allow you to simply fold the invoices and place them in the envelopes without having to write the mailing or return addresses.

Normally, you will print your fleet statements every month. The statement end dates will normally be on the last day of the previous month (in the following examples, we are using February 1 to February 28 as the billing period, with February 28 as the Statement End Date).

After you successfully print your statements, you will be asked if you want to “Close the Billing Cycle”.

The Billing Cycle, or the Billing Period, refers to the date range of activity for your statements. After you print your invoices, you will close the billing period based on the last day of that month (in this example, February 28). Now, when you send out your invoices for the next billing period (March 1 – March 31), the system will know that the last billing period was ended on February 28 and only print activity after that date.

IMPORTANT! There is a functional difference between the Print Preview and Print options on this page! Normally, Print sends the document to the printer, and Print Preview displays the document on the screen, and you can print it from there. However, in this case, the Print option also allows you to close your billing cycle after the invoices print. Print Preview does not give you this option, you must close the billing cycle manually. It is important to understand these differences.

Start Fleet Name, End Fleet Name These fields allow you to choose the range of fleet accounts you wish to print. The accounts are sorted alphabetically by name, and these options automatically list your first and last fleet accounts – in other words, all of them. Press the arrows to select a specific fleet if you wish to only print one, or a particular range of fleets.

Print Accounts with No Activity and 0 Balance Normally this will be NO, if a fleet account has no balance and no activity for the billing period, QuickTouch will not print an invoice.
Statement End Date This will default to the current date but will normally be set to the last day of the previous month.

The screenshot shows the 'Fleet Statements' application window. The title bar is red and contains the text 'Fleet Statements' and several navigation icons: a checkmark (OK), a crossed-out 'X' (Cancel), a left arrow (Back), a right arrow (Forward), and a clock (ClockIn). The main content area is light blue and contains several input fields. The first row has 'Start Fleet Name' with the value 'Extton Police Department' and a right-pointing arrow. The second row has 'Start Account #' with the value '1001'. The third row has 'End Fleet Name' with the value 'Sage Trucking Company' and a right-pointing arrow. The fourth row has 'End Account #' with the value '1000'. Below these fields is a section for 'End Date' with the value '1/4/2022'. At the bottom of the main area, there are two rows of buttons. The first row has 'Print Accounts with No Activity and 0 Balance' with 'Yes' and 'No' buttons. The second row has 'Send Email Statements when Printing Statements' with 'Yes' and 'No' buttons. At the very bottom of the window, there are two large buttons: 'Print Preview' and 'Print'.

Print Preview This will display the invoices on the screen so you can review them before printing. You can then print them from the Print Preview screen. However, if you do this, YOU WILL NOT BE PROMPTED TO CLOSE THE BILLING CYCLE after the invoices print, you will have to do this manually through the Close Billing Cycle function. See the Charge Interest section of this document for more information.

It is important to close the billing cycle on the same day statements are printed. This ensures that fleet accounts with Balance Forward statements have accurate due dates.

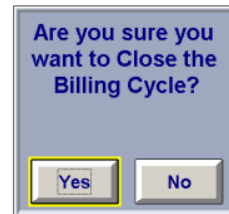
Print This will print the invoices. After QuickTouch sends the invoices to the printer, you will be prompted “Are you sure you want to Close the Billing Cycle?”

Pop-up Window – Closing Cycle

If all the invoices print successfully, you can say Yes, and the billing cycle will be closed based on the Statement End Date.

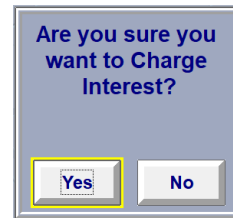
****DO NOT PRESS YES OR NO UNTIL THE INVOICES ARE DONE PRINTING.****

If you press No, you can fix any issues that caused you to press No and print again, selecting yes after successful printing of the new print job. If you do not need to reprint statements, you can close the cycle manually through the Close Billing Cycle function.



Pop-up Window – Charging Interest

If any fleet account is being charged interest for late payments and has late payments, you will be prompted to add any interest charges that apply to the current statement. (See next section for information interest charges.)



Fleet Statement Example

Note that the “From” information is configured under the Center Information option of General Setup Options. To set this up, from the Main Menu, choose System Management, General Setup Options, Center Information.

FROM: EXPRESSWAY LUBE 9633 S. 3600 WEST EXTON, PA. 19341 321-654-9870		ACCOUNT STATEMENT													
TO: SAGE TRUCKING COMPANY Attn: JOHN 140 SOUTH VILLAGE AVENUE EXTON, PA 19341		<table border="1"> <tr><th colspan="2">AR AGING SUMMARY</th></tr> <tr><td>0 - 30</td><td>\$ 62.47</td></tr> <tr><td>31 - 60</td><td>\$ 0.00</td></tr> <tr><td>61 - 90</td><td>\$ 0.00</td></tr> <tr><td>91 - 120</td><td>\$ 0.00</td></tr> </table>				AR AGING SUMMARY		0 - 30	\$ 62.47	31 - 60	\$ 0.00	61 - 90	\$ 0.00	91 - 120	\$ 0.00
AR AGING SUMMARY															
0 - 30	\$ 62.47														
31 - 60	\$ 0.00														
61 - 90	\$ 0.00														
91 - 120	\$ 0.00														
ACCOUNT#	STATEMENT DATE	CREDIT LIMIT	TERMS	PREVIOUS BALANCE	PAGE										
1000	02/28/05	\$ 1000.00	30 days/invoice	\$ 0.00	1										
SERVICE ACTIVITY	NEW CHARGES	PAYMENTS/CREDITS	OPEN CREDIT	NEW BALANCE	PAYMENT DUE DATE										
\$ 124.94	\$ 124.94	\$ 62.47	937.53	\$ 62.47	30 days/invoice										
ACCOUNT ACTIVITY															
DATE	INVOICE	ICFNSF#	YR	MAKF	MODF	DESCRIPTION	SUBTOTAL	DISCOUNT	TAX	TOTAL	RAI ANCF				
1/24/2005	7	PA-TEST1	2004	FORD TR	F150 PI	FULL SERVICE	62.47	0.00	0.00	62.47	0.00				
2/10/05						Credit #1 Applied (Inv#7) Early Payment Discount				-5.00					
2/10/05						Check #1234				-57.47					
2/2/2005	8	PA-TEST2	2005	FORD TR	F250 HD	FULL SERVICE	62.47	0.00	0.00	62.47	62.47				

Charge Interest

All fleet account invoices are due within a certain number of days, and the *Charge Interest* feature allows you to charge interest on fleet account invoices that are overdue. In QuickTouch, there are two different methods of charging interest: the Balance Forward method and the Open Items method (paying by invoice). These methods along with the number of days to allow before charging interest is set in Fleet Account Maintenance.

Balance Forward

For fleet accounts setup as Balance Forward, an invoice is payable within “X” number of days from the date the *statement* was printed, and billing cycle closed. (Multiple invoices may be included on a statement.)

Example of interest on invoices for fleet accounts setup as Balance Forward with 10 days to pay (from the date of the monthly *statement*):

- A fleet vehicle comes in the January 1st.
- The fleet vehicle receives work, and the invoice is worth \$50.00.
- The statements are printed at the end of the month, which in this case the statement is printed on January 30th.
- The invoice from January 1st is due February 10th.
- Another fleet vehicle comes in January 29th and receives some work, the invoice is still payable February 10th.
- Statements are printed on January 30th and no payment is received by February 20th; therefore, interest is incurred for every day the statement isn't paid. (If the printing of the statements is delayed, then the due date would be delayed.)
- After pressing the Process button, (in this case it is processed on the 20th of February) and the statement balance isn't paid, this fleet customer will incur 10 days of interest on the statement balance.

Open Items (Pay by Invoice)

For fleet accounts setup as Open Items, an invoice is payable within “X” number of days from the date the *invoice*.

Example of interest, on invoices for fleet accounts setup as Open Items with 10 days to pay (from the date of the *invoice*).

- A fleet vehicle comes in January 5th.
- The fleet vehicle receives some work, and the invoice is worth \$50.00.
- The date of the invoice is the date of the service.
- That makes the invoice January 15th. It does not matter if statements were printed or not.
- Each day past January 15th gets interest charged until the invoice is paid.
- Another fleet vehicle comes in January 29th and receives work. The invoice for this vehicle is due within 10 days.

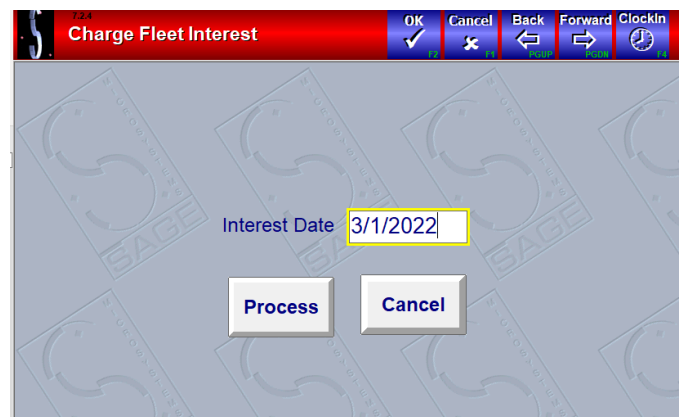
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Note: If Interest was charged when printing invoices, a pop-up window will let you know.

From the Main Menu, choose Fleet Account Management then choose Charge Interest.

Enter the Interest Date (typically end of month). Click Process to calculate the interest.

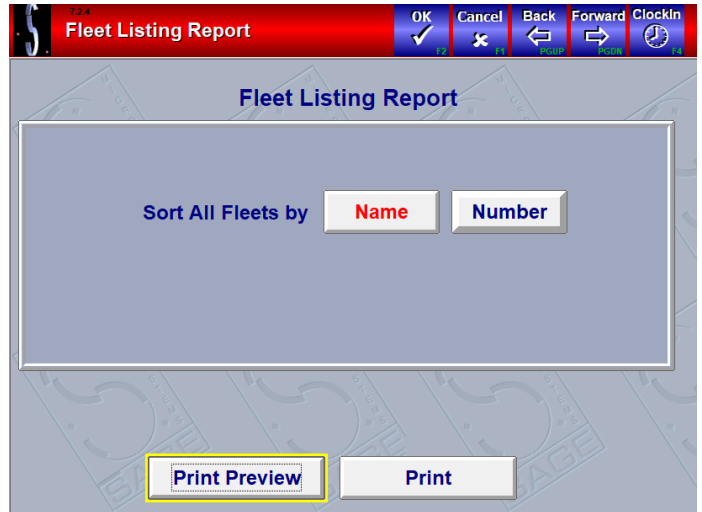
IMPORTANT: This cannot be undone. The interest charges will show as individual debits under each fleet account. The only way to undo the interest charge is to create a credit for that amount and then apply it to the interest charge.



Fleet Reports

Fleet Account Listing

This report will list all fleet accounts and some basic information, including telephone number, contact name, pricing category, the number of vehicles assigned to that fleet account, and whether charges are allowed.

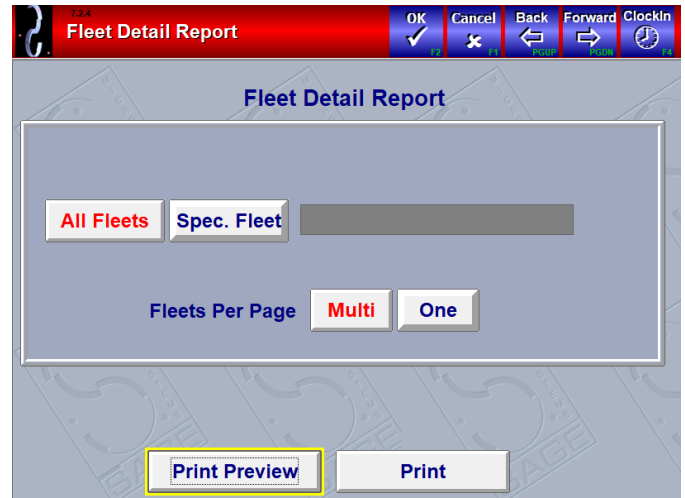


Fleet Account Listing
SpeeDeed
1/5/2022

ACCOUNT#	ACCOUNT NAME	TELEPHONE	CONTACT	PRICING CATEGORY	NUMBER VEHICLES	ALLOW CHARGE
1001	EXTON POLICE DEPARTMENT	800-724-7400	JACK	A	10	YES
	123 G.E. CAPITAL	303-694-3424	ACCOUNTS PAYABLE	NONE	5	YES
1000	SAGE TRUCKING COMPANY	800-724-7400	JOHN	A	11	YES
TOTAL FLEET ACCOUNTS FOUND: 3						
TOTAL CARS WITH FLEET ACCOUNTS FOUND: 26						

Fleet Account Detail Report

This report will list the vehicles that are assigned to each fleet account.



Fleet Account Detail
SpeeDeed
1/5/2022

ACCOUNT#	ACCOUNT NAME/ADDRESS/PHONE	PRICING CATEGORY	LICENSE#	VEHICLE INFORMATION	MODEL	ALLOW CHARGE
1001	EXTON POLICE DEPARTMENT 100 SOUTH MAIN STREET EXTON, PA 19341 800-724-7400 JACK	A	PA-214	0		YES
			PA-445	2008	CHRYSLER	300
			PA-85241	1992	CHEVROLET TRU	BLAZER
			PA-6565	1992	CHEVROLET	CARRICE
			PA-245	1995	FORD	CONTOUR
			PA-345	1999	FORD	CROWN VICTORIA
			PA-114	2005	SUBARU	IMPREZA
			PA-3651	2000	CHEVROLET	MONTE CARLO
			PA-456	1998	LINCOLN	NAVIGATOR
			PA-514	2000	LINCOLN	NAVIGATOR

Fleet Transaction Journal

This report shows all fleet transactions for each fleet account for a given date range.

Fleet Transaction Journal SpeedDeed All Records Between 01/05/2004 and 01/05/2022

ACCOUNT #	ACCOUNT NAME	TRNS TYPE	POSTING DATE	AMOUNT	DESCRIPTION	INVOICE #	INVOICE LICENSE#	MOP
1001	EXTON POLICE DEPARTMENT	PAYMENT	04/30/07	20.00	CK102	64		
1001	EXTON POLICE DEPARTMENT	PAYMENT	05/14/07	25.12	CK101	65		
1001	EXTON POLICE DEPARTMENT	PAYMENT	05/17/07	50.00	CK101	67		
1001	EXTON POLICE DEPARTMENT	PAYMENT	05/17/07	150.00	CK101	68		
1001	EXTON POLICE DEPARTMENT	PAYMENT	06/04/07	20.00	5667	69		
1001	EXTON POLICE DEPARTMENT	CREDIT	06/04/07	20.00		7		
1001	EXTON POLICE DEPARTMENT	APP. CR.	06/04/07	20.00		7		
1001	EXTON POLICE DEPARTMENT	CREDIT	09/14/07	20.00	CH104	8		
1001	EXTON POLICE DEPARTMENT	CREDIT	09/14/07	2.69		9		
1001	EXTON POLICE DEPARTMENT	APP. CR.	09/14/07	17.31	CH104	8		
1001	EXTON POLICE DEPARTMENT	APP. CR.	09/14/07	2.69		9		
1001	EXTON POLICE DEPARTMENT	PAYMENT	09/21/07	12.11	CK1204	70		
1001	EXTON POLICE DEPARTMENT	CREDIT	09/21/07	12.11		10		
1001	EXTON POLICE DEPARTMENT	APP. CR.	09/21/07	12.11		10		
1001	EXTON POLICE DEPARTMENT	PAYMENT	01/07/08	50.00	CK105	71		

Fleet Aging Summary

This report lists all fleet accounts with a summary of outstanding balances, and the number of days past due. This makes it easy to distinguish between slightly overdue accounts and long overdue accounts.

Fleet Aging Summary SpeedDeed 01/05/2022

ACCOUNT#	FLEET NAME	STATE	LAST DATE	0-30	31-60	61-90	91-120+	CREDIT LIMIT	SERVICE ACTIVITY	PREV. BALANCE	NEW CHARGES	PAYMENT CREDITS	CURRENT BALANCE
1001	EXTON POLICE DEPA		10/28/2008	0.00	0.00	0.00	77.87	1000.00	2149.71	77.87	123.85	255.00	-53.28
123	G.E. CAPITAL		10/15/2000	0.00	0.00	0.00	0.00	1000.00	66.87	0.00	75.00	50.00	25.00
1000	SAGE TRUCKING COM		12/31/1999	0.00	0.00	0.00	0.00	1000.00	926.09	0.00	214.88	173.61	41.27
				0.00	0.00	0.00	77.87	3000.00	3142.67	77.87	413.73	478.61	12.99

TOTAL CURRENT RECEIVABLES: 12.99
PERCENT OF CURRENT RECEIVABLES TO TOTAL CREDIT LIMIT: .43%

Close Billing Cycle

The Billing Cycle, or the Billing Period, refers to the date range of activity for your statements. After you print your invoices, you will close the billing period based on the last day of that month (for example, February 28). Now, when you send out your invoices for the next billing period (March 1 – March 31), the system will know that the last billing period was ended on February 28 and only print activity after that date.

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When you print your fleet statements, you will be prompted to close your billing cycle. If you use Print Preview to view your statements before printing, you will not be prompted to close your billing cycle, and thus will need to use this screen.

Simply enter the date of the billing cycle you wish to close. Please note that you cannot undo this function.

You will be notified if the billing cycle has already been closed.

