

EFM CUSTOMER WEBSITE

How-to-Guides

TABLE OF CONTENTS

Create A User	3
Dashboard Overview	5
Vehicle Details	8
Vehicle Descriptors	10
Vehicle Descriptors – Bulk Update	13
Billing	14
Change Driver	18
Alerts	20
Taxable Benefits Reporting	25

Have a question or need more information?

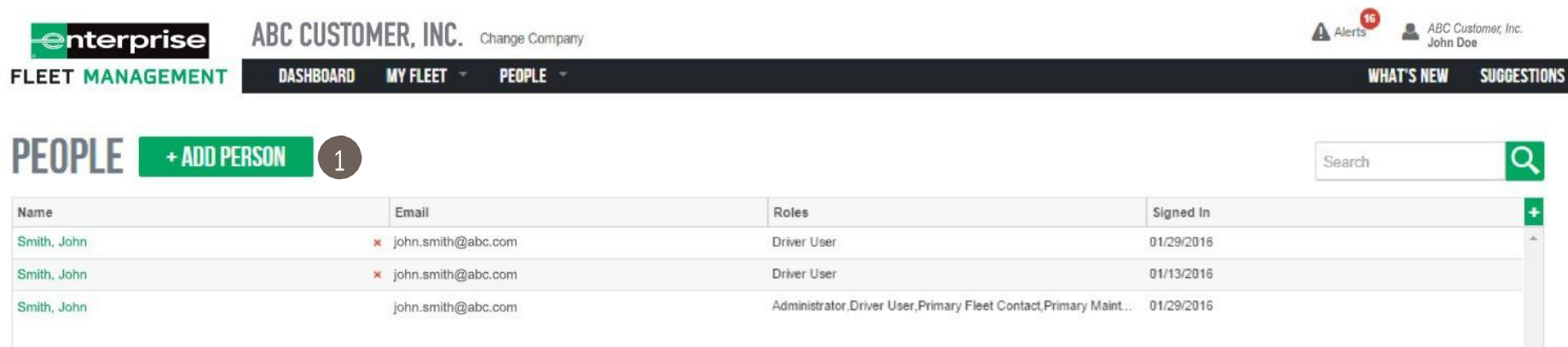
Please contact your Enterprise Fleet Management Representative.

CREATE A USER QUICK GUIDE

Customer Website

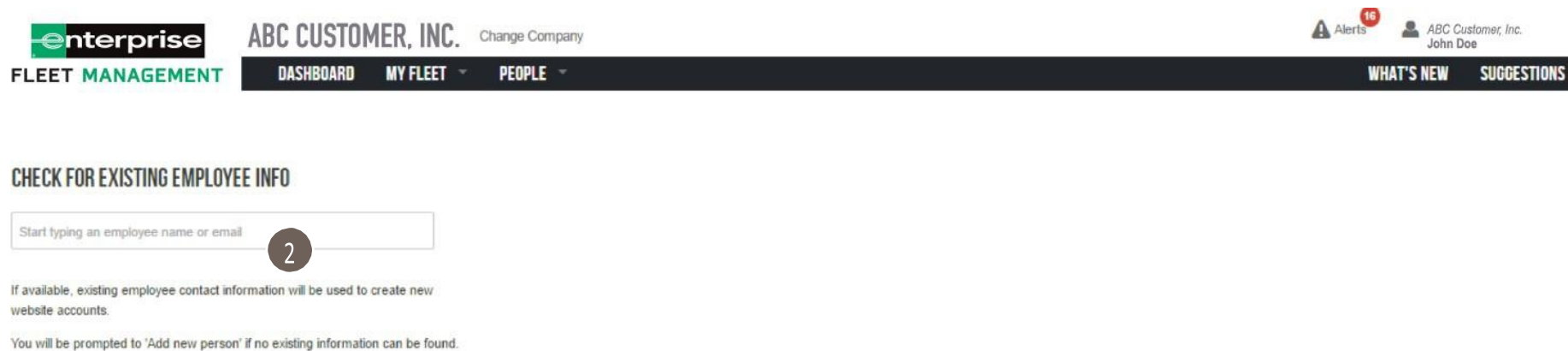
This guide helps provide a brief overview of the general “Add Person” layout. The page allows you to view contact information and assign user roles for the EFM Customer Website.

1. Click “Add Person” in order to add a person to the People page.



Name	Email	Roles	Signed In
Smith, John	✗ john.smith@abc.com	Driver User	01/29/2016
Smith, John	✗ john.smith@abc.com	Driver User	01/13/2016
Smith, John	john.smith@abc.com	Administrator, Driver User, Primary Fleet Contact, Primary Maint...	01/29/2016

2. To check if they are already in the Enterprise Fleet Management system, enter their name or email in the search field.



Start typing an employee name or email

If available, existing employee contact information will be used to create new website accounts.

You will be prompted to 'Add new person' if no existing information can be found.

CREATE A USER QUICK GUIDE

Customer Website

3. The email address entered is used as the employee's username for logging into the site.
4. At least one role must be selected for the new user, but multiple roles can also be assigned.
5. Driver Users' have access to log in to the website and view information for only the vehicles to which they are assigned.
6. The role 'Driver No Access' allows the contact to be assigned as a driver on vehicles via the website and allows Administrator users to send the drivers email alerts for their assigned vehicles. However, the 'Driver No Access' user is unable to log on to the EFM website.
7. 'Mobile Preferences' grants access to the Enterprise Fleet Management mobile application and can be set to push notifications or disable the application while the vehicle is in motion.

**FLEET MANAGEMENT**

ABC HOME AND COMMERCIAL SERVICES, INC - CAPITAL 409063 [+][Change Company](#)

 Locations  Alerts  Enterprise Fleet Management
AMANDA HALL

DASHBOARD ACQUIRE MY FLEET SALE PEOPLE PARTNERS TRAINING

WHAT'S NEW SUGGESTIONS

ADD PERSON FIELDS MARKED * ARE REQUIRED

* EMAIL / USER ACCOUNT

* Email:

* Confirm Email:

Email serves as username for this website.

* USER ROLE

☐ Administrator Create new users, create new vehicle descriptors, grant mobile access.	☐ Primary Fleet Contact View and update (driver, address, mileage etc.) data for entire fleet.	☐ Secondary Fleet Contact View and update (driver, address, mileage etc.) data for entire fleet.	☐ AP/Billing Contact View bill and download invoice data.	☐ Primary Maintenance Contact View and download maintenance data and maintenance cards.	☐ Secondary Maintenance Contact View and download maintenance data and maintenance cards.
☐ Fuel Administrator View and download fuel data.	☐ Decision Maker Read only access to all pages.	☐ Read Only Read only access to all pages.	☐ Driver User View and update (mileage) data for vehicle. May be assigned to vehicles.	☐ Safety Recall Contact View and download recall data.	☐ Maintenance Assistant View and download maintenance data and maintenance cards but is not a repair approver.
☐ Driver No Access No login access. May be assigned to vehicles.					

MOBILE PREFERENCES

☐ Mobile Access: ? ☐ Mobile Push Notifications: ? ☐ Mobile Motion Disable: ?

DASHBOARD QUICK GUIDE

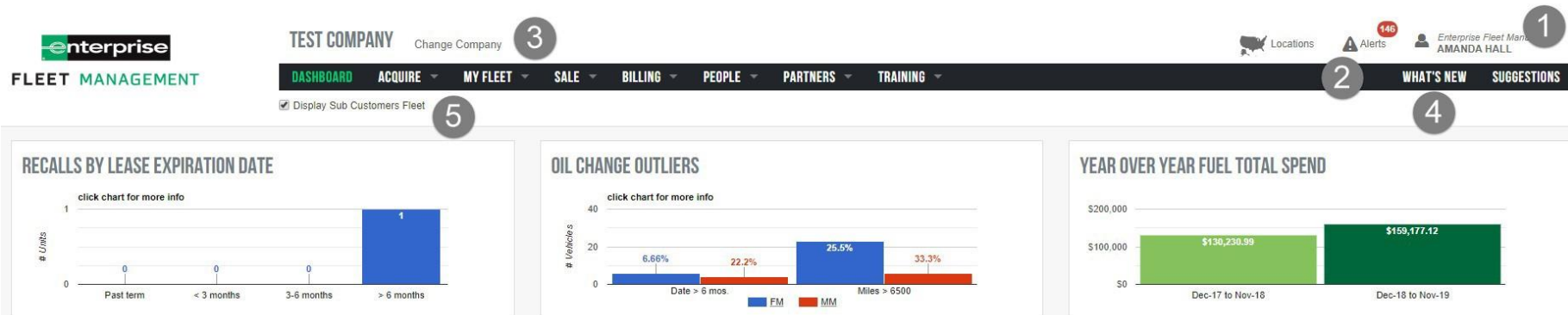
Customer Website

This guide helps provide a brief overview of the general “Dashboard” layout throughout the customer website. Here you will see the high level features and navigation options to help you find important information quickly. Below are a few sections that highlight these functions: Navigation, Charts and the Dashboard.

SECTION 1: NAVIGATION

Here in the navigation, you will be able to jump to any of the top level dashboards (i.e. Dashboard, Maintenance, Driver, People, etc.) as well as view important alerts, new features or view additional account information.

1. **User Menu:** Change your password or logout of your session.
2. **Alerts Badge:** Displays count of active alerts with dropdown menu.
3. **Change Company:** Specific user account roles assigned to master accounts will be able to navigate to sub accounts within their structure/hierarchy. Not applicable for standalone accounts.
4. **What's New:** Displays updated information on new/upcoming features.
5. **Display Sub Customer Fleet Checkbox:** Specific user roles assigned to master accounts have the choice to see all account data for accounts within their structure/hierarchy or just the master account. Not available for standalone accounts.



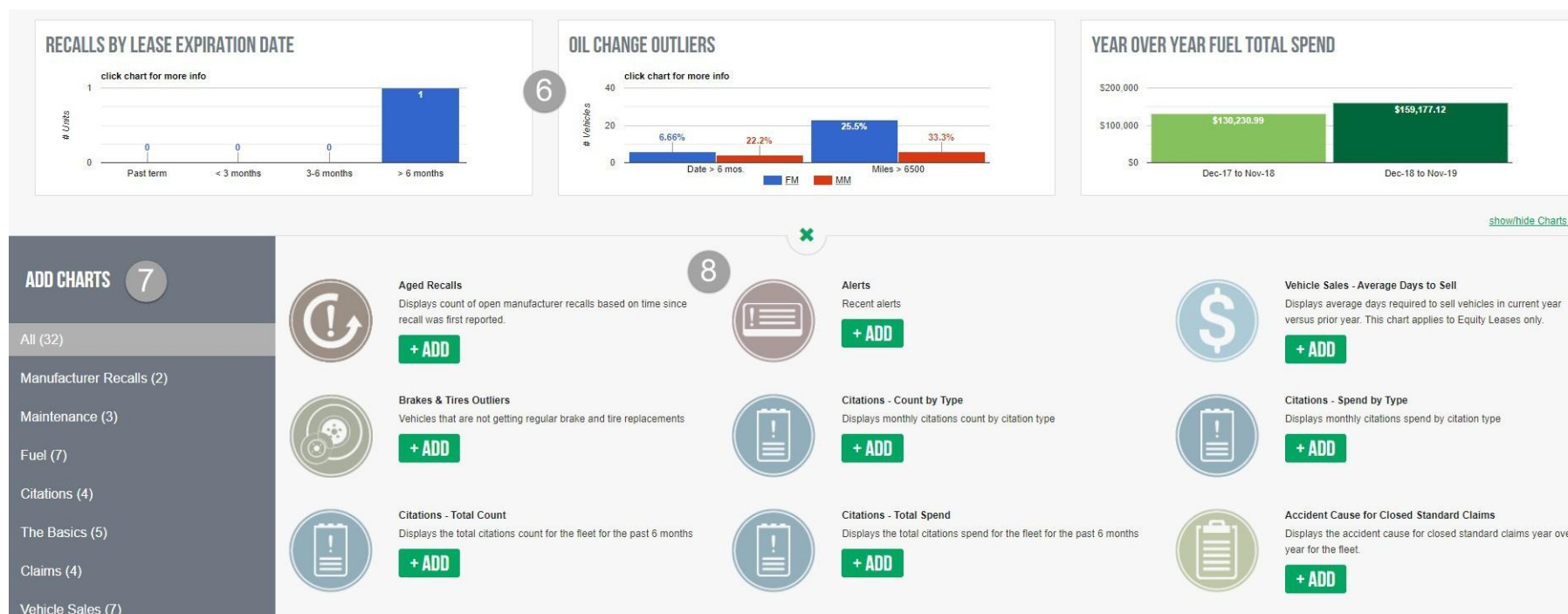
Have a question or need more information?

Please contact your Enterprise Fleet Management Representative.

SECTION 2: CHARTS

The chart library provides a variety of ways to view the status of your fleet. Charts include options such as Fuel YOY Total Spend, Fleet Mix, Maintenance and many more. You can easily customize and update your dashboard to feature the information you want to see. These charts are also available to use on all of the top level dashboards.

6. **Chart:** Specific data focusing on many different areas of your fleet.
7. **Chart Library:** Select from a variety of available charts.
8. **Chart Detail:** Select from available charts in the library to display detail.



Have a question or need more information?

Please contact your Enterprise Fleet Management Representative.

DASHBOARD QUICK GUIDE

Customer Website



SECTION 3: FLEET SUMMARY

The Fleet Summary report provides a top level view for your entire fleet as well as the ability to jump to either the Vehicle Details page (which provides in-depth information for a unit) or the Driver Details page (which provides information regarding the driver for all units they are or have been assigned to). Customize the layout of your grid by moving, adding or removing columns. Your settings will be saved for the future log-ins.

Fleet Summary Section

9. **Report Timeframe:** Select timeframe of data you would like to view.
10. **Download:** Export grid data in Excel, PDF and CSV formats.
11. **Search:** Dynamic search enables search based on any data in grid.
12. **Column Adjuster:** Add/Hide columns available on the grid summary to customize your view. Columns can also be moved individually by clicking and dragging. Any column can also be sorted in ascending/descending order.

The screenshot shows the Fleet Summary interface. Callout 9 points to the 'Current' dropdown menu. Callout 10 points to the 'DOWNLOAD' button. Callout 11 points to the search bar. Callout 12 points to the column adjuster icon (a green plus sign in a circle) at the end of the table header.

Vehicle	VIN	Year	Make	Model	Series	Driver	Customer Name	Master Custom...	Customer Vehi...	Pool Vehicle	Lease Term	Lease Start Date	Months In Servi...	Mileage	Mileage Date	
ABC111	1F123456789	2015	Ford	F-250	XL 4x2 SD Supe...	23456789AAAA	ABC Customer - A	ABC Customer, Inc.	San Diego	-	48	01/27/2015	2	5	01/23/2015	
ABC112	1F123456788	2015	*Trailer	*Trailer	TRL	23456789AAAB	ABC Customer - B	ABC Customer, Inc.	San Diego	-	-	07/21/2014	0	-	-	
ABC112	1F123456787	2015	Ford	F-250	XL 4x2 SD Supe...	23456789AAAC	ABC Customer - C	ABC Customer, Inc.	-	-	48	10/08/2014	5	18762	02/21/2015	
ABC112	1F123456786	2015	*Trailer	*Trailer	TRL	23456789AAAD	ABC Customer - D	ABC Customer, Inc.	Marietta	-	-	07/21/2014	0	-	-	

Add additional columns or ones that have been hidden previously.

Have a question or need more information?

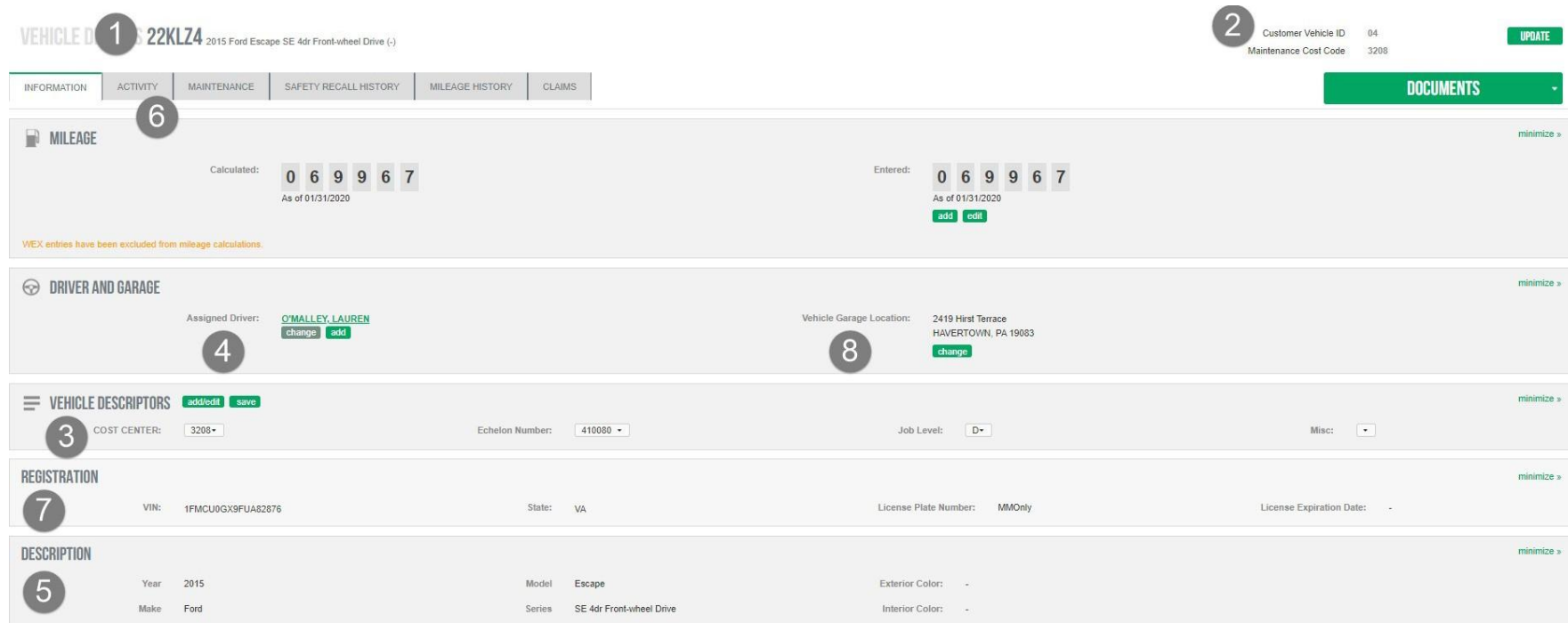
Please contact your Enterprise Fleet Management Representative.

VEHICLE DETAILS QUICK GUIDE

Customer Website

This guide provides an overview of the Vehicle Details page for each unit. On this page you will be able to view information regarding your lease, detailed activity of all the events for that vehicle, assign drivers, create/apply custom descriptors as well as view/update mileage and more.

- 1. Unit ID:** Unique vehicle identifier for a vehicle assigned by EFM.
- 2. Customer Vehicle ID:** Vehicle identifier for any unit created and assigned by you. This can also be edited online.
- 3. Vehicle Descriptors:** Create additional vehicle labels/categories with assigned values for a vehicle.
- 4. Driver:** Assigned driver to a specific unit. You can also assign a new driver or create a new one.
- 5. Vehicle Information:** Detailed information related to your vehicle.
- 6. Vehicle Activity:** History of all events related to the vehicle (e.g.: fuel, maintenance, citations, etc.).
- 7. Registration:** Year/Make/Model/Series as well as licensing information
- 8. Vehicle Location:** Physical address of your unit. This can also be updated online.



The screenshot displays the 'VEHICLE DETAILS' page for a 2015 Ford Escape SE 4dr Front-wheel Drive. The page is organized into several sections, each with a numbered callout:

- 1. Unit ID:** 22KLZ4
- 2. Customer Vehicle ID:** 04
- 3. Vehicle Descriptors:** Includes fields for COST CENTER (3208), Echelon Number (410080), Job Level (D), and Misc.
- 4. Driver:** Assigned Driver: O'MALLEY, LAUREN
- 5. Description:** Year (2015), Make (Ford), Model (Escape), Series (SE 4dr Front-wheel Drive), Exterior Color (-), Interior Color (-)
- 6. Mileage:** Calculated (069967) and Entered (069967) as of 01/31/2020. Includes a note: 'WEX entries have been excluded from mileage calculations.'
- 7. Registration:** VIN (1FMCU0G39FUA82876), State (VA), License Plate Number (MMOnly), License Expiration Date (-)
- 8. Vehicle Location:** 2419 Hirst Terrace, HAVERTOWN, PA 19083

Additional elements include a 'DOCUMENTS' button and a 'minimize' link for each section.

VEHICLE DETAILS QUICK GUIDE

Customer Website

- 9. **Current Mileage:** View the most recent mileage captured.
- 10. **Add:** Create a new mileage entry

- 11. **Edit:** Edit a previous mileage entry
- 12. **Lease Details:** General Lease Information

VEHICLE DETAILS 22KLZ4 2015 Ford Escape SE 4dr Front-wheel Drive (-)

Customer Vehicle ID 04
Maintenance Cost Code 3208

UPDATE

INFORMATION ACTIVITY MAINTENANCE SAFETY RECALL HISTORY MILEAGE HISTORY CLAIMS

DOCUMENTS

MILEAGE

Calculated: 0 6 9 9 6 7
As of 01/31/2020

9
Entered: 0 6 9 9 6 7
As of 01/31/2020
10 add edit 11

ENTER MILEAGE FOR 22KLZ4

Unit Number: 22KLZ4
Driver: LAUREN O'MALLEY
Vehicle: 2015 Ford Escape SE 4dr Front-wheel Drive
*Effective Date: 02/12/2020
MM/DD/YYYY

ODOMETER

Previous: 69967 As of 01/31/2020
*Current:

Miles Driven: 0
*Personal Miles: or %

Notes:

SAVE

CANCEL

MILEAGE DETAILS 22KLZ4

2015 Ford Escape SE 4dr Front-wheel Drive

Date	Odometer	Odometer Source	Driver	Notes	Created On	Personal Miles	Miles Driven
01/31/2020	69967	MOBILE	LAUREN O'MALLEY		01/31/2020	179	2,232
12/30/2019	67735	MOBILE	LAUREN O'MALLEY		12/30/2019	97	1,067
11/30/2019	66668	MOBILE	LAUREN O'MALLEY		11/30/2019	7	68
09/30/2019	66600	MOBILE	LAUREN O'MALLEY		10/01/2019	144	1,595
08/31/2019	65005	MOBILE	LAUREN O'MALLEY		09/01/2019	195	2,160
07/30/2019	62845	MOBILE	LAUREN O'MALLEY		07/30/2019	137	1,514
06/28/2019	61331	MOBILE	LAUREN O'MALLEY		06/28/2019	155	1,541
05/31/2019	59790	MOBILE	LAUREN O'MALLEY		06/03/2019	187	1,862
04/30/2019	57928	MOBILE	LAUREN O'MALLEY		04/30/2019	174	1,925
03/30/2019	56003	WEB	LAUREN O'MALLEY		03/30/2019	140	1,558

Cancel Update

*Date *Odometer Miles Driven *Personal Miles Notes +Add Entry

LEASE DETAILS

12

Delivery Date: 09/28/2017

Scheduled Lease End Date: -

Mos. in Service: 28

Book Value: 0.00

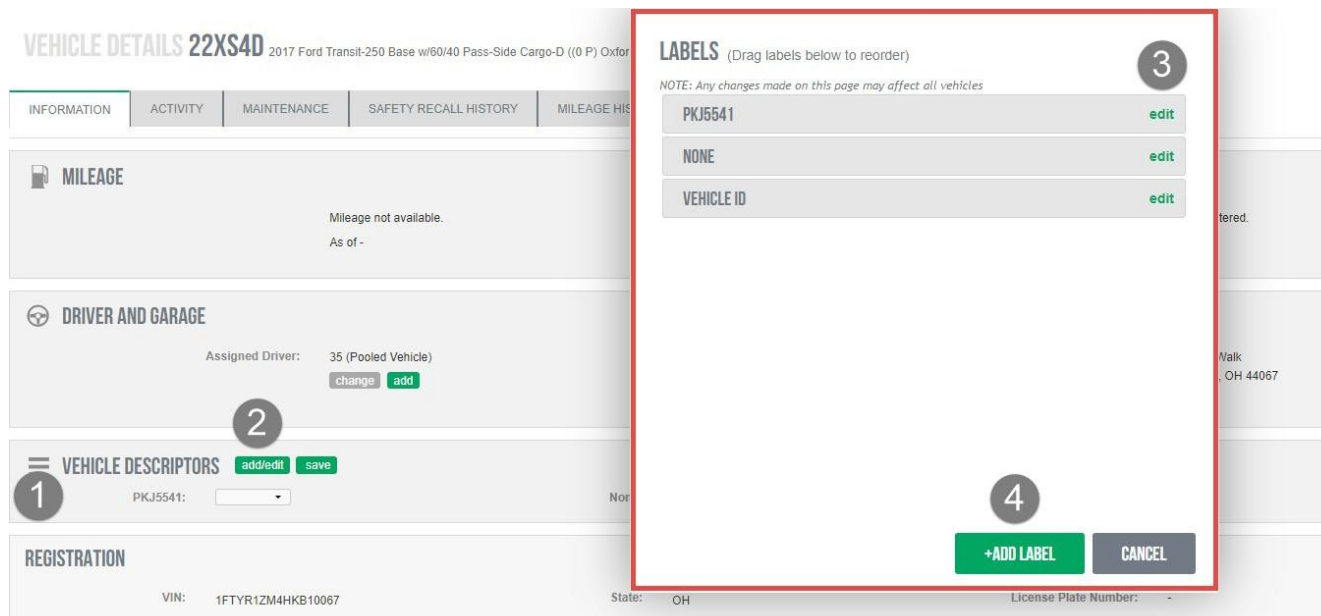
VEHICLE DESCRIPTORS QUICK GUIDE

Customer Website

Vehicle Descriptors can be added as tags to identify each vehicle in the fleet. These descriptors can help track accounting codes, job sites or any other item a customer needs to identify on a per unit basis.

CREATING AND EDITING VEHICLE DESCRIPTORS: Only Users with Administrator roles can create or edit descriptors.

1. **Vehicle Descriptors** can help display additional identifying information about a vehicle and are defined at the master customer level and cascade down to sub-customers.
2. **Add/Edit** brings up a new screen opens to enable users to add, change or update Vehicle Descriptors.
3. **Edit** a label heading or add values for a label, click “edit” next to the label of your choice. You can drag the labels to reorder them.
4. **+Add Label** to create new descriptor.



The screenshot displays the 'VEHICLE DETAILS' page for a 2017 Ford Transit-250. The page has tabs for INFORMATION, ACTIVITY, MAINTENANCE, SAFETY RECALL HISTORY, and MILEAGE HISTORY. The 'VEHICLE DESCRIPTORS' section is highlighted with a circled '1' and shows a dropdown menu with 'PKJ5541' selected. Below it, the 'REGISTRATION' section shows the VIN '1FTYR1ZM4HKB10067' and the state 'OH'. A modal window titled 'LABELS' is open, showing a list of labels: 'PKJ5541', 'NONE', and 'VEHICLE ID', each with an 'edit' button. The modal is numbered '3' in the top right corner. At the bottom of the modal, there is a '+ADD LABEL' button (numbered '4') and a 'CANCEL' button. A note at the top of the modal states: 'NOTE: Any changes made on this page may affect all vehicles'.

Customer Website

UPDATING VEHICLE DESCRIPTORS: *Users with Primary Fleet Contact, Secondary Fleet Contact or Administrator roles can perform updates.*

5. Dropdowns will appear for each of the vehicle descriptors and you can choose a value from within them
6. **Save** when all selections are complete.
7. **+** from the top right corner of the grid to add Vehicle Descriptors.

VEHICLE DESCRIPTORS

save

6

PKJ5541:

PKK4749

None:

Vehicle ID:

REGISTRATION

VIN:

1FTYR1ZM4HKB10067

State:

OH

License Plate Number:

-

Download		Search	
showing 111 of 111 rows			
Series	License State ...	License Num ...	License Exp. Dat..
Tradesman Cargo...	MA	-	Available Columns:
XLT Passenger W...	-	-	013
Tradesman Cargo...	MA	6202T9	Garage Street Address 2
S 4dr Front-wheel...	MA	C43059	Garage Street Address 3
S 4dr Front-wheel...	MA	7771V1	Garage Street Address 4
S 4dr Front-wheel...	MA	7766V1	Truck number
S 4dr Front-wheel...	MA	7765V1	
SE 4dr 4x4	MA	R3528M	

VEHICLE DESCRIPTORS QUICK GUIDE

Customer Website

8. The Vehicle Descriptor column will be added at the far right of the grid.
9. By hovering over the column and selecting the down carrot, columns can be used to sort the grid, pin left or pin right. You can also move by dragging and dropping.
10. New Columns are included in the downloads

FLEET SUMMARY
Current

☒ Leased (L)
☒ Client-Owned with Ancillaries (COVA)
☒ Client-Owned (COV)

10

DOWNLOAD

Total Rent/Mo	L&T*	Service Char...	Current RBV*...	Calculated Milea...	Calculated Milea...	Entered Mileage*...	Entered Mileage ...	Garage Street Address 1 ...	Garage City	Garage State	Garage County ...	Garage Postal Co...
\$474.05	\$0.00	\$399.00	\$8,989.27	-	-	-	-	7265 Bay 50th Street	EDISON	NJ	MIDDLESEX	08817-281
\$465.43	\$0.00	\$399.00	\$16,567.62	-	-	-	-	7265 Bay 50th Street	EDISON	NJ	MIDDLESEX	08817-281
\$579.65	\$0.00	\$399.00	\$22,196.89	-	-	-	-	7265 Bay 50th Street	EDISON	NJ	MIDDLESEX	08817-281
\$25.50	\$0.00	\$375.00	\$375.00	-	-	-	-	4884 Lake Street	NEWARK	DE	NEW CASTLE	197
\$25.50	\$0.00	\$375.00	\$375.00	-	-	60132	01/31/2018	4884 Lake Street	NEWARK	DE	NEW CASTLE	197
\$30.60	\$0.00	\$375.00	-\$719.46	-	-	-	-	4884 Lake Street	NEWARK	DE	NEW CASTLE	197
\$25.50	\$0.00	\$375.00	\$375.00	-	-	-	-	4884 Lake Street	NEWARK	DE	NEW CASTLE	197
\$25.50	\$0.00	\$375.00	\$375.00	-	-	-	-	4884 Lake Street	NEWARK	DE	NEW CASTLE	197
\$25.50	\$0.00	\$375.00	\$375.00	-	-	-	-	4884 Lake Street	NEWARK	DE	NEW CASTLE	197

8

Truck number

9

+

017

Sort Ascending

046

Sort Descending

052

Remove Sort

052

Hide Column

055

Pin Left

056

Pin Right

057

070

076

Truck number

Note: Grid configuration changes, such as re-ordering or hiding columns, are saved based on the customer and the user who's logged in. This means these changes do not save for EFM employees because they view all customers. EFM employees can view the configuration format the customer's Primary Fleet Contact is using by clicking Switch to Customer View in the dropdown menu under the employee name in the top right hand corner of the web page.

VEHICLE DESCRIPTORS BULK UPDATE QUICK GUIDE

Customer Website



1. Search limits the results displayed on the screen.
2. Define descriptors individually using the vehicle specific dropdown.
3. Define descriptors to all vehicles using the label dropdown in column header.

UPDATE VEHICLE DESCRIPTORS [+ add/edit descriptors](#)

UPDATE VEHICLE DESCRIPTORS + add/edit descriptors										1
										Search
										showing 109 of 109 rows
Vehicle	Driver	Customer Vehicle ID	Year	Make	Model	Series	VIN	Truck number	013	3
								Change all ▾	Change all ▾	
23BSSK	SAMANTHA MOORE	-	2020	RAM	ProMaster City	Tradesman Cargo Van	FAB8L6P27175ZFBHR	- ▾	▾ ▾	
22TDHV	JEN BARNES	9200	2019	Nissan	Frontier	S (A5) 4x2 King Cab 6 ft. box ...	0CT2KN7070901N6BD	136 ▾	▾ ▾	
22TDKX	CARRIE JONES	9200	2019	Nissan	Frontier	S (A5) 4x2 King Cab 6 ft. box ...	0CT5KN7071161N6BD	137 ▾	▾ ▾	
22TDM3	MANDY HANSON	9200	2019	Nissan	Frontier	S (A5) 4x2 King Cab 6 ft. box ...	0CT8KN7075321N6BD	138 ▾	▾ ▾	
22TSM8	WILMA KARDASHIAN	9105	2019	Jeep	Cherokee	Latitude 4dr 4x4	MCBXKD3032481C4PJ	141 ▾	▾ ▾	
22XMRH	MANDY ROGERS	-	2019	RAM	ProMaster City	Tradesman Cargo Van	FAB3J6L57768ZFBHR	- ▾	▾ ▾	2
22ZGR6	CARRIE SMITH	46	2019	RAM	ProMaster City	Tradesman Cargo Van	FAB5K6N12450ZFBHR	- ▾	▾ ▾	
22ZXW6	DAVE GRANT	-	2019	Ford	Fusion	S 4dr Front-wheel Drive Sedan	0G70KR1254223FA6P	- ▾	▾ ▾	
23399N	GEORGE ZAVALA	45	2019	RAM	ProMaster City	Tradesman Cargo Van	FAB8K6M67701ZFBHR	017	▾ ▾	
23399R	KEVIN DONALDSON	42	2019	RAM	ProMaster City	Tradesman Cargo Van	FAB3K6M67931ZFBHR	046	▾ ▾	
2339B3	RICH BARNES	43	2019	RAM	ProMaster City	Tradesman Cargo Van	FAB2K6M61229ZFBHR	052	▾ ▾	
2339DV	RICH KARDASHIAN	44	2019	RAM	ProMaster City	Tradesman Cargo Van	FAB4K6M61233ZFBHR	055	▾ ▾	
233H74	DAVE HANSON	9100	2019	Nissan	Frontier	S (A5) 4x2 King Cab 6 ft. box ...	0CT0KN7373821N6BD	056	▾ ▾	
233H77	JEN SMITH	9100	2019	Nissan	Frontier	S (A5) 4x2 King Cab 6 ft. box ...	0CT2KN7374161N6BD	057	▾ ▾	

Vehicle descriptor values associated with vehicles at the time a billing charge is finalized are tagged to that billing charge detail and are part of the billing data on the website.

Important: Vehicle descriptor labels and values *cannot be deleted* once saved to support historical reporting.

Note: If you edit the vehicle descriptors value for descriptors already associated with vehicle (s), all changes will apply to all vehicles. For example, if 20 vehicles are in the label of “Region” and have the value of “East” as the vehicle descriptor value and a user edits that value to from “East” to “Eastern”, all 20 vehicles will be changed to “Eastern”.

BILLING QUICK GUIDE

Customer Website



Enterprise Fleet Management offers an interactive version of your monthly statement on our website. The online version of the statement provides detailed billing information plus additional visibility into certain types of charges. Formatting can be adjusted based on preference, and the detailed billing information can also be easily downloaded in your preferred file format (such as Excel).

To view and manage billing data, navigate to Billing → Statement.

Note: Billing navigation is only available at the master customer level or at a sub-customer level which has items billed to it.

The screenshot shows the Enterprise Fleet Management website interface. The top navigation bar includes links for Report Issue, Resources, Locations, L&T Items, Alerts, and the user profile (ADAM PRINCE). The main navigation menu has tabs for DASHBOARD, ACQUIRE, MY FLEET, SALE, BILLING, PEOPLE, PARTNERS, and TRAINING. The BILLING tab is selected, and the STATEMENTS sub-tab is highlighted with a red box and an arrow. Below the navigation, there's a vehicle search bar and a "What's New" button. The main content area displays the "STATEMENT DETAIL AB052204". It includes a "Bill-to account" dropdown set to "ABC Construction CO. (503XXX)", a "Statement Date" dropdown set to "May 2022", and a "Download" button. The statement table shows the following data:

Account	Details	Previous Balance	Payments	Adjustments	Charges	New balance	Amount due
Monthly Invoice	view	\$2,244.79	\$(1,208.37)	\$(338.15)	\$3,699.25	\$5,073.82	\$5,073.82
Lease Prepayments	view	\$(83,204.12)	\$0.00	-	\$9,114.78	\$(74,089.34)	-
Unapplied Payments	view	-	\$(2,608.67)	-	-	\$(2,608.87)	-
Out of Cycle Invoices	view	\$1,001.11	\$0.00	\$(21.37)	\$14,523.12	\$15,545.60	\$1,022.48

Summary information on the right:

- Total amount due: **\$6,096.30**
- Late if not paid by: **5/20/2022**
- Late payment warning: past due items are subject to a Finance Charge of 1.5% per month (annual rate of 18%)
- [Download Remittance Coupon](#)

Payment information at the bottom:

- Payment info** dropdown
- AutoPay Sign Up**: Save time and avoid late fees, [sign up for autopay now!](#). Call Billing Solutions for more details: (866) 556-2864.
- Pay by phone**: 1-866-566-2864. Push ACH or Wire payment. Commerce for Enterprise Routing 101000019. Account: 208022091.
- Expedited overnight payment**: Commerce Bank. ATTN: 8000089 KCWLEX. 811 Main Street. Kansas City, MO 64105. 1-816234-2627.
- Email remittance advice to**: FM_Receiving_Team@efleets.com

BILLING QUICK GUIDE

Customer Website

WEBSITE STATEMENT DETAIL:

Vehicle Descriptors can be added as tags to identify each vehicle in the fleet. These descriptors can help track accounting codes, job sites or any other item a customer needs to identify on a per unit basis.

1. The **Bill-to account** drop-down menu provides easy navigation between different accounts to display the appropriate billing detail.
2. The **Statement Date** drop-down provides the ability to view billing history for the designated billing period. Once the date is selected, the summary grid will update with that month's billing detail.
3. Click **Download** to generate a PDF copy of the Statement for the selected period.
4. Click **Download Remittance Coupon** to generate a PDF copy of the remittance coupon for the selected billing period.
5. The **View** hyperlink will navigate users to the corresponding detail page for each *Account* type (listed below). *Sections will only be displayed if applicable to your unique billing circumstances.*
 - i. **Monthly Invoice:** All balances related to monthly invoice charges (including previous and current month charges), payments, adjustments, and the total amount due.
 - ii. **Lease Prepayments:** Prepaid lease activity that occurred within the designated billing period.
 - iii. **Unapplied Payments:** Payments received but not applied (partially or fully) to charges invoiced on an account.
 - iv. **Out of Cycle Invoices:** A listing of charges that were collected upfront between billing cycles.
6. To sign up for AutoPay, use the **Sign up for AutoPay now!** option. Follow the instructions listed in the on-screen prompt to easily enroll.
7. Additional payment options are listed under **Payment info**.

enterprise
FLEET MANAGEMENT

Report Issue Resources Locations L&T Items Alerts Enterprise Fleet Management

DASHBOARD ACQUIRE MY FLEET SALE BILLING PEOPLE PARTNERS TRAINING

☒ Display Sub Customers Fleet Joe's Example Factory 453XXX Change Company

Vehicle search

What's New Suggestions Contact Us

STATEMENT DETAIL AB052204

Bill-to account: ABC Construction CO. (503XXX) 1 Statement Date: May 2022 2 [Download](#) 3

Account	Details	Previous Balance	Payments view	Adjustments view	Charges	New balance	Amount due
Monthly Invoice	view	\$2,244.79	\$(1,208.37)	\$(338.15)	\$3,699.25	\$5,073.82	\$5,073.82
Lease Prepayments	view	\$(83,204.12)	\$0.00	-	\$9,114.78	\$(74,089.34)	-
Unapplied Payments	view	-	\$(2,608.67)	-	-	\$(2,608.87)	-
Out of Cycle Invoices	view	\$1,001.11	\$0.00	\$(21.37)	\$14,523.12	\$15,545.60	\$1,022.48

Total amount due: \$6,096.30
Late if not paid by: 5/20/2022
Late payment warning: past due items are subject to a Finance Charge of 1.5% per month (annual rate of 18%)
[Download Remittance Coupon](#) 4

Payment Info

AutoPay Sign Up 6
Save time and avoid late fees. [sign up for AutoPay now!](#)
Call Billing Solutions for more details: (888) 555-2884

Pay by phone:
1-866-566-2864
Push ACH or Wire payment
Commerce for Enterprise Routing 101000019
Account: 208022091

Expedited overnight payment:
Commerce Bank
ATTN: 8000089 KCWLEX
811 Main Street
Kansas City, MO 64105
1-816234-2627

Email remittance advice to:
FM_Receivng_Team@efleets.com 7

BILLING QUICK GUIDE

Customer Website



FLEET MANAGEMENT

MONTHLY INVOICE DETAIL:

1. The **Summary** provides a brief overview of the different components that make up the Monthly Invoice balance owed.
2. **Balance Detail** provides a detailed view of all items billed within the selected billing period.
 - i. Filters and toggles are available to assist with viewing transactions by charge type.
 - ii. Vehicle Descriptors can be added as tags to identify fleet vehicles with unique identifiers. These descriptors can help track accounting codes, job sites, or any other descriptors needed to classify charges on a per-vehicle basis.
3. **Pending Items** display billed charges finalized by Enterprise Fleet Management that are not yet consolidated on the monthly statement. These charges are anticipated for next month's statement. This view does not include pending recurring monthly charges.

Monthly Invoice	
Summary	1 Balance Detail Pending Items
Previous balance	\$2,244.79 +
Payments (3)	(\$1,208.37) -
Adjustments (2)	(\$338.15) -
New finance charges	\$29.86 +
Recurring charges (FMR013XXX)	\$2,192.10 +
Non-recurring charges (FOT013XXX)	\$1,769.56 +
Equity on Vehicle Sales (FOT013XXX)	\$292.27 +
New balance as of 2022-5-4	
	\$5,658.36

BILLING QUICK GUIDE

Customer Website



FLEET MANAGEMENT

Monthly Invoice

Summary
Balance Detail
2 Pending Items

All Charges
☒ Show Recurring Charges
☒ Show Adjustments
☒ Show Non-Recurring Charges
☒ Show Finance Charges
☒ Show Equity on Vehicle Sales
☒ Show Partial Payments

DOWNLOAD
Search

showing 45 of 45 rows

Cust Name	Cust Num	Vehicle	Customer Vehicle ID	Maint Cost Code	Invoice Date	Consolid Inv Num	Activity Date	Invoice	Category	Type	Charge Detail
ABC Construction Co	503XXX				4/5/2022	FOT013XXXX	3/25/2022	20723813-OT	Non-Recurring	Other	VIP Rental
ABC Construction Co	503XXX	23GSW7	97	LC596585	4/5/2022	FMR013XXXX	4/1/2022 - 4/5/2022	23GSW7-0422-MF	Recurring	Base Lease	Lease Charge (Full Month): Depreci
ABC Construction Co	503XXX	23GSW7	97	LC596585	4/5/2022	FMR013XXXX	4/1/2022 - 4/5/2022	23GSW7-0422-MF	Recurring	Base Lease	Lease Charge (Full Month): Interest
ABC Construction Co	503XXX	23GSW7	97	LC596585	4/5/2022	FMR013XXXX	4/1/2022 - 4/5/2022	23GSW7-0422-MF	Recurring	Other	Lease Charge (Full Month): Mgmt F
ABC Construction Co	503XXX	23GSW7	97	LC596585	4/5/2022	FMR013XXXX	4/1/2022 - 4/5/2022	23GSW7-0422-MF	Recurring	Maint Fee	Lease Charge (Full Month): Full Mai
ABC Construction Co	503XXX	23GSWC	111	LC596586	2/31/2022	FMR013XXXX	2/17/2022 - 2/31/2022	23VX2P-0221-MR	Recurring	Other	Lease Charge (Partial Month): Mgmt
ABC Construction Co	503XXX	23GSWC	111	LC596586	3/31/2022	FMR013XXXX	3/1/2022 - 3/31/2022	23VX2P-0321-MR	Recurring	Base Lease	Lease Charge (Full Month): Depreci
Cust Name	Cust Num	Vehicle	Customer Vehicle ID	Maint Cost Code	Invoice Date	Consolid Inv Num	Activity Date	Invoice	Category	Type	Charge Detail

Base Lease \$1760.51
Maint Fee \$670.96
Insurance \$0.00
All Other Charges \$1224.99
Adjustments \$-890.16
Partial Payments* \$-138.68
Tax \$267.08
Total \$2628.62

Reset Grid Preferences
Grid height 25 rows

Monthly Invoice

Summary
Balance Detail
Pending Items
3

⚠ These charges are not finalized, do not pay

DOWNLOAD
Search

showing 41 of 41 rows

Cust Name	Cust Num	Vehicle	Customer Vehicle ID	Maint Cost Code	Invoice Date	Activity Date	Invoice	Charge Detail	Ext Desc	Maint RO ID
ABC Construction Co	503XXX	23GSWC	111	LC596586	2/31/2022	2/17/2022 - 2/31/2022	23VX2P-0221-MR	Lease Charge (Partial Month): Depreciation		1
ABC Construction Co	503XXX	23GSWC	111	LC596586	2/31/2022	2/17/2022 - 2/31/2022	23VX2P-0221-MR	Lease Charge (Partial Month): Interest		2
ABC Construction Co	503XXX	23GSWC	111	LC596586	2/31/2022	2/17/2022 - 2/31/2022	23VX2P-0221-MR	Lease Charge (Partial Month): Mgmt Fee		3
ABC Construction Co	503XXX	23GSWC	111	LC596586	3/31/2022	3/1/2022 - 3/31/2022	23VX2P-0321-MR	Lease Charge (Full Month): Depreciation		4
ABC Construction Co	503XXX	23GSWC	111	LC596586	3/31/2022	3/1/2022 - 3/31/2022	23VX2P-0321-MR	Lease Charge (Full Month): Interest		5
ABC Construction Co	503XXX	23GSWC	111	LC596586	3/31/2022	3/1/2022 - 3/31/2022	23VX2P-0321-MR	Lease Charge (Full Month): Mgmt Fee		6

CHANGE DRIVER QUICK GUIDE

Customer Website

This guide helps provide a brief overview of how to change the driver of a vehicle.

Changing a Driver:

1. Current driver is displayed in the driver section of the vehicle details screen.
2. A user can update the assigned driver by selecting 'Change' next to the driver's name.
3. The current assigned driver is displayed at the top of the screen. A list of available drivers is listed below.
4. Users can search for a driver using the search bar.
5. To select a new driver, click the button next to the driver's name.
6. Click next to advance or cancel to be taken back to the vehicle details page.

enterprise
FLEET MANAGEMENT

TEST COMPANY Change Company

DASHBOARD ACQUIRE M

VEHICLE DETAILS 234PKG 2019 Ford Escape S 4dr Front-wheel Drive ((0 P) Oxf

INFORMATION ACTIVITY MAINTENANCE SAFETY RECALL HISTORY

MILEAGE

Mileage not available.
As of -

DRIVER AND GARAGE

Assigned Driver: **GRANT, JEN**
change **add**

VEHICLE DESCRIPTORS **add/edit** **save**

Truck number:

REGISTRATION

VIN: 0F78KUA563141FMCU

ASSIGNED DRIVER 3

GRANT, JEN
123 Main Street
CHELMSFORD, MA 01824

SELECT NEW DRIVER 4

Search

Driver	Year...	Make ...	Model	Series	Mileage...
ANDERSON, TOM	-	-	-	-	-
CRANE, JEN	2017	RAM	ProMaster City	Tradesman Carg...	-
DONALDSON, TOM	-	-	-	-	-
GRANT, DAVE	2019	Ford	Fusion	S 4dr Front-whe...	-
GRANT, JEN	2019	Ford	Escape	S 4dr Front-whe...	-
HANSON, SAMANTHA	2015	RAM	ProMaster City	Tradesman Carg...	-
JONES, TOM	-	-	-	-	-
LANE, KEVIN	2019	Ford	Escape	S 4dr Front-whe...	-
LANE, PAM	2019	Ford	Escape	S 4dr Front-whe...	-

1 of 24 of 24 Items 1 25 Items per page

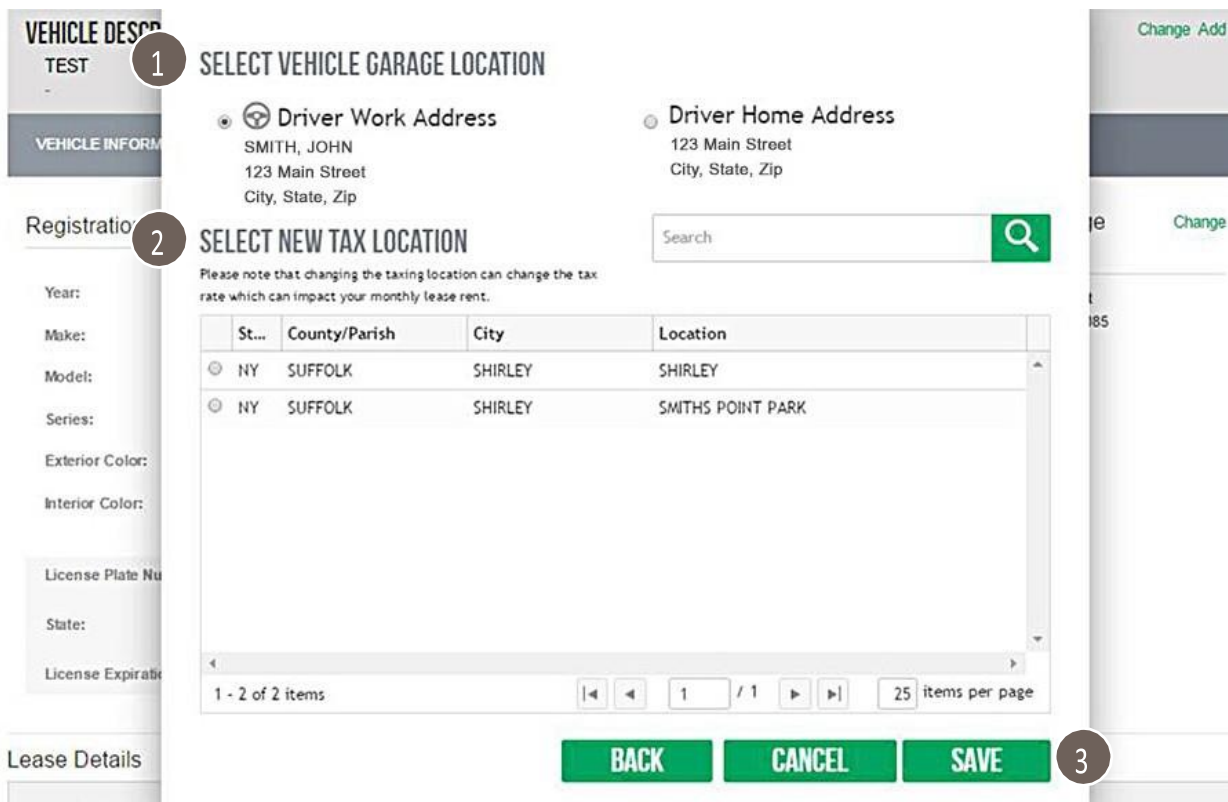
CANCEL **NEXT** 6

CHANGE DRIVER QUICK GUIDE

Customer Website

Select Vehicle Garage Location:

1. The available addresses for a driver are displayed, both home and work. You can toggle between the addresses. Tax location will update as needed.
2. Taxing location is set according to city and zip code rules. Tax location can affect lease rent.
3. You must specify a taxing location before proceeding to save the data.



1 **SELECT VEHICLE GARAGE LOCATION**

☒ **Driver Work Address**
SMITH, JOHN
123 Main Street
City, State, Zip

☐ **Driver Home Address**
123 Main Street
City, State, Zip

2 **SELECT NEW TAX LOCATION**

Please note that changing the taxing location can change the tax rate which can impact your monthly lease rent.

St...	County/Parish	City	Location
☒ NY	SUFFOLK	SHIRLEY	SHIRLEY
☐ NY	SUFFOLK	SHIRLEY	SMITHS POINT PARK

1 - 2 of 2 items | 1 / 1 | 25 items per page

3 **BACK CANCEL SAVE**

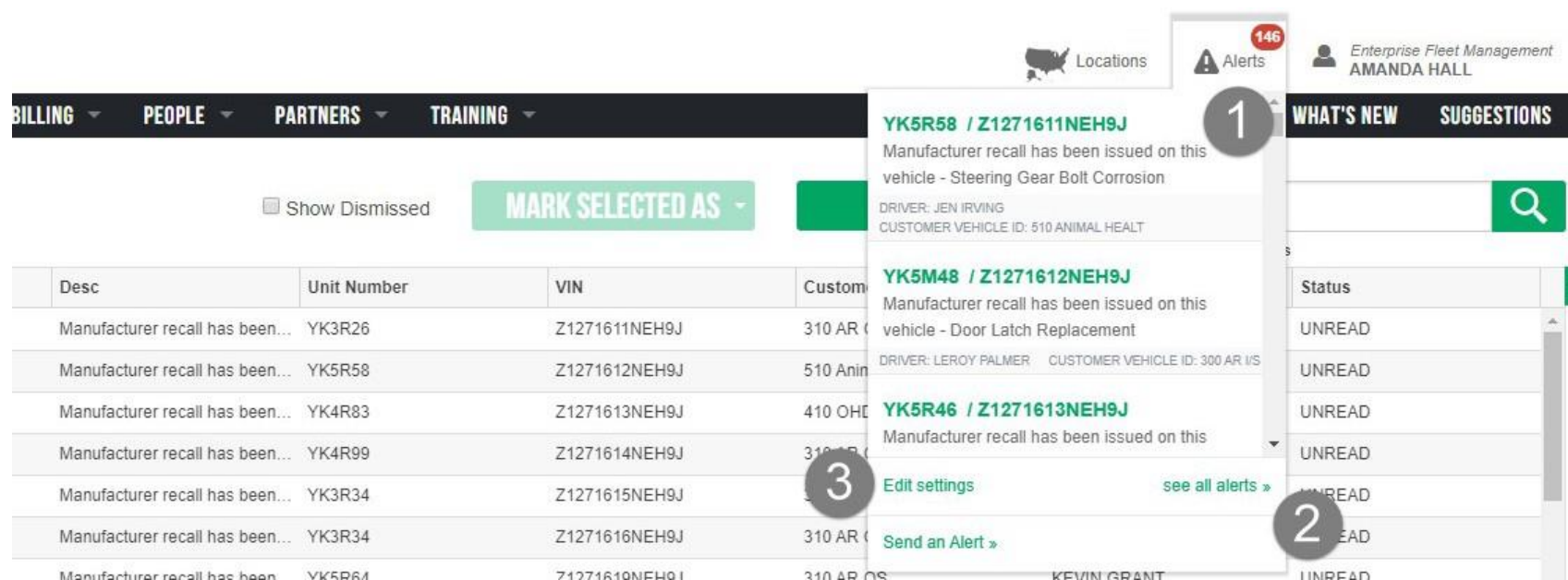
ALERTS QUICK GUIDE

Customer Website

HOW TO VIEW ALERTS

This guide helps provide a brief overview of the alerts functionality. Alerts functions like an inbox. You will be able to view alerts, see alert history, mark alerts as read and unread and update subscription information for non-administrators and administrators.

1. Click '**Alerts**' to access the drop down menu. The red bubble indicates how many unread alerts you have.
2. **See All Alerts** takes you to a list of your alerts in an in-box format.
3. **Edit Settings** takes you to the Settings/Alert Subscription page. For more details on subscriptions, see page 22.



The screenshot displays the Enterprise Fleet Management interface. At the top, there's a navigation bar with 'BILLING', 'PEOPLE', 'PARTNERS', and 'TRAINING'. A dropdown menu for 'Alerts' is open, showing a list of alerts with details like 'Manufacturer recall has been issued on this vehicle - Steering Gear Bolt Corrosion'. The dropdown menu includes options like 'Edit settings', 'Send an Alert', and 'see all alerts'. A red bubble indicates 146 unread alerts. A table of alerts is visible in the background.

Desc	Unit Number	VIN	Customer
Manufacturer recall has been...	YK3R26	Z1271611NEH9J	310 AR C
Manufacturer recall has been...	YK5R58	Z1271612NEH9J	510 Anin
Manufacturer recall has been...	YK4R83	Z1271613NEH9J	410 OHC
Manufacturer recall has been...	YK4R99	Z1271614NEH9J	310 AR C
Manufacturer recall has been...	YK3R34	Z1271615NEH9J	310 AR C
Manufacturer recall has been...	YK3R34	Z1271616NEH9J	310 AR C
Manufacturer recall has been...	YK5R64	Z1271610NEH9J	310 AR C

ALERTS QUICK GUIDE

Customer Website

4. **Edit settings** is a link to access the Alerts Subscription page to change alert preferences. See next page for more detail.
5. **Status** is changed to read once the alert has been viewed.
6. The **status** can be adjusted by clicking the checkbox along the left side and changing **mark selected as** dropdown to the desired option.
7. **Download** a list of Alerts to CSV, Excel or PDF.
8. **Show Dismissed** allows to view alerts that were previously dismissed.

The screenshot shows the Enterprise Fleet Management interface. At the top, there's a navigation bar with 'FLEET MANAGEMENT' and a 'TEST COMPANY' header. Below this is a menu bar with options like DASHBOARD, ACQUIRE, MY FLEET, SALE, BILLING, PEOPLE, PARTNERS, and TRAINING. On the right, there are links for Locations, Alerts (with a red badge showing 146), and a user profile for Amanda Hall. The main section is titled 'ALERTS' with an 'Edit settings' link (callout 4). Below this is a table of alerts. The first row is highlighted, and a red arrow points to the 'Mark Selected As' dropdown menu (callout 6), which has options for 'Read' and 'Dismissed'. A 'Show Dismissed' checkbox is also visible (callout 8). To the right of the table, there is a 'DOWNLOAD' button (callout 7) and a search bar. The status of the selected alert is shown as 'UNREAD' (callout 5). The table columns include Date, Alert ID, Severity, Category, Desc, Unit Number, Customer Vehicle ID, Driver Name, and Status.

Date	Alert ID	Severity	Category	Desc	Unit Number	Customer Vehicle ID	Driver Name	Status
-	538984	HIGH	Manufacturer Recalls	Manufacturer recall has been...	YK3R26	310 AR OS	NICOLE HANSON	UNREAD
-	538992	HIGH	Manufacturer Recalls	Manufacturer recall has been...	YK4R83	410 OHD O-S	ANDY LANE	UNREAD
-	538996	HIGH	Manufacturer Recalls	Manufacturer recall has been...	YK4R99	310 AR OS	RICH CRANE	UNREAD
-	539001	HIGH	Manufacturer Recalls	Manufacturer recall has been...	YK3R34	310 AR OS	DAVE JONES	UNREAD

ALERTS QUICK GUIDE

Customer Website

ALERT SUBSCRIPTION: AVAILABLE USER ROLES

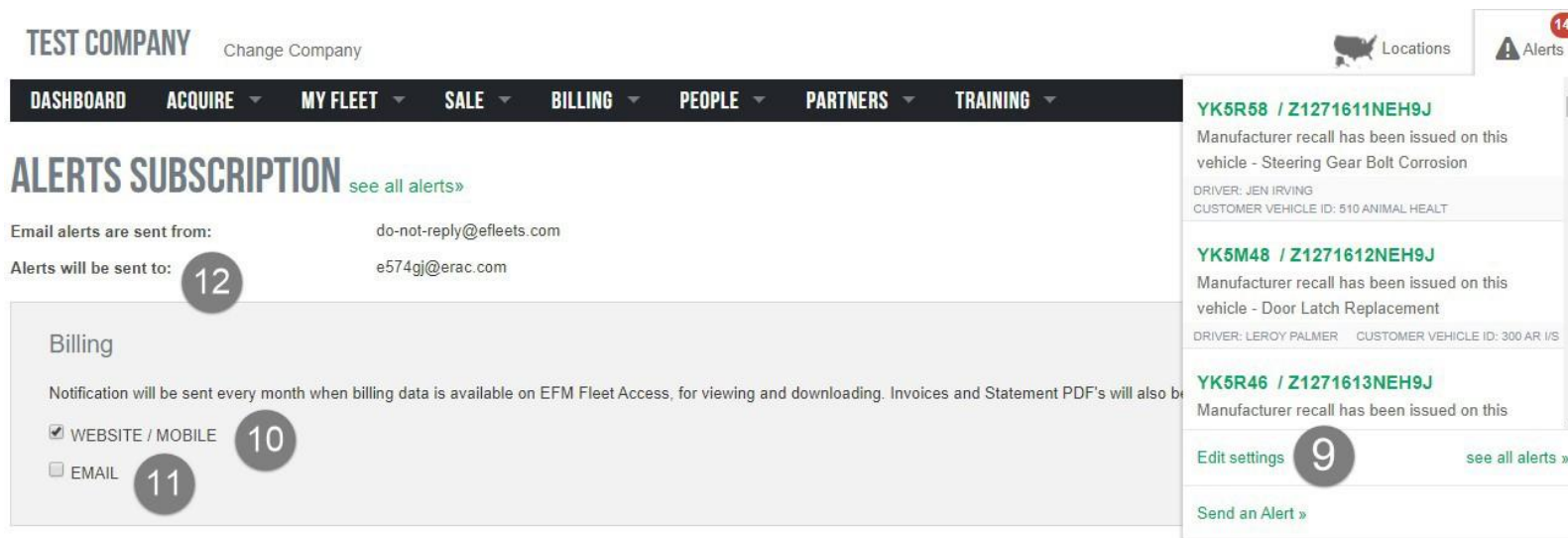
Alert settings are based on the role(s) assigned to a user.

- **Driver User** or **Driver No Access** roles only receive alerts for the vehicle(s) they are listed as driver contacts for on the website
- **Administrator** user will have an additional option to set email alerts for all drivers..
- Users with any additional roles will receive alerts for all units within their area of responsibility.

ALERT SUBSCRIPTION PAGE:

Website users can set their Alert Subscription preferences via this screen. The roles assigned to each user dictate the options available on this screen.

9. **Edit Settings** from the **Alerts** drop down or the alerts page navigates to the Alert Settings/Subscription page.
10. By checking the box next to **Website/Mobile**, you are choosing to receive an alert for this subscription.
11. By checking the box next to **Email**, you are choosing to receive an alert to your email inbox.
12. The email address that will receive the alerts is identified at the top of the screen.



TEST COMPANY [Change Company](#)

DASHBOARD **ACQUIRE** **MY FLEET** **SALE** **BILLING** **PEOPLE** **PARTNERS** **TRAINING**

ALERTS SUBSCRIPTION [see all alerts»](#)

Email alerts are sent from: do-not-reply@efleets.com

Alerts will be sent to: **12** e574gj@erac.com

Billing

Notification will be sent every month when billing data is available on EFM Fleet Access, for viewing and downloading. Invoices and Statement PDF's will also be available.

☒ **WEBSITE / MOBILE** **10**

☐ **EMAIL** **11**

Alerts **146**

YK5R58 / Z1271611NEH9J
Manufacturer recall has been issued on this vehicle - Steering Gear Bolt Corrosion
DRIVER: JEN IRVING
CUSTOMER VEHICLE ID: 510 ANIMAL HEAT

YK5M48 / Z1271612NEH9J
Manufacturer recall has been issued on this vehicle - Door Latch Replacement
DRIVER: LEROY PALMER
CUSTOMER VEHICLE ID: 300 AR I/S

YK5R46 / Z1271613NEH9J
Manufacturer recall has been issued on this vehicle - Door Latch Replacement

[Edit settings](#) **9** [see all alerts »](#)

[Send an Alert »](#)

ALERTS QUICK GUIDE

Customer Website

ALERT SUBSCRIPTION PAGE: LEVELS OF SEVERITY AND MILEAGE ENTRY REMINDERS

Website users can set their Alert Subscription preferences via this screen. The roles assigned to each user dictate the options available on this screen.

13. Some subscriptions allow users to set alerts based on level of severity such as Lease Renewal, Registration Renewal and Oil Changes.
 - * Description of each level of severity is listed within the subscription
14. If an Administrator wants all driver users to get email alerts, they can check these boxes. Driver users do not have the ability to override this setting.
15. Administrators can send alerts to remind drivers to enter their mileages.

Oil Change 13

Months since last oil change > 6 mos. OR Estimated mileage since last oil change > 6500

LOW

☒ WEBSITE / MOBILE

☒ EMAIL

☐ Email alerts for all Drivers* 14

Months since last oil change > 9 mos. OR Estimated mileage since last oil change > 8000

MEDIUM

☒ WEBSITE / MOBILE

☒ EMAIL

☐ Email alerts for all Drivers*

Months since last oil change > 12 mos. OR Estimated mileage since last oil change > 10000

HIGH

☒ WEBSITE / MOBILE

☒ EMAIL

☐ Email alerts for all Drivers*

Mileage Entry Reminder 15

☐ WEBSITE / MOBILE

☐ EMAIL

Send reminders Monthly ▾

☒ on day 15 ▾

☐ on the last ▾ Wednesday ▾

ALERTS QUICK GUIDE

Customer Website

ALERT SUBSCRIPTION PAGE: CUSTOM ALERTS

Only available to **Administrator** role users. Can be used to send alerts to users outside of the standard subscriptions.

16. **Custom Alert** is a one time alert that you can send
17. Fill in the Message box with custom alert message.
18. **Send Now** to complete and send the alert.

19. **Scheduled Custom Alert** is a reoccurring alert
20. Fill in the Message box with custom alert message.
21. Establish recurrence of alertmessage.

CUSTOM ALERT 16

Custom alerts are sent from: e594jk@erac.com

Alert Message 17

☐ EMAIL
☐ WEBSITE / MOBILE

☒ Send to all Drivers ☐ Send to Custom list

18

SEND NOW

SCHEDULED CUSTOM ALERT 19

These alerts will be sent on a regular schedule that you set. You can add multiple alerts or remove alerts you have already created

Alert Message 20

☐ EMAIL
☐ WEBSITE / MOBILE

☒ Send to all Drivers ☐ Send to Custom list

Send reminders Monthly 21

☒ on day 15
☐ on the last Wednesday

TAXABLE BENEFITS REPORTING

Customer Website

Data and reporting are available for current leased units only and can be accessed via the Customer Home Page under the My Fleet portion of the menu.

[DASHBOARD](#)[ACQUIRE](#)[MY FLEET](#)[SALE](#)[BILLING](#)

Display Sub Customers Fleet

Leased (L)
Client-Owned with Ancillaries (COVA)
Client-Owned (COV)

License Num ...	Master Cust Nam...
	Master Test Comp...
	Master Test Comp...
3788C5	Master Test Comp...
0164C3	Master Test Comp...
0195C3	Master Test Comp...
3937C1	Master Test Comp...

CITATIONS

CLAIMS

CLIENT-OWNED

FUEL

LEASE

LICENSE & REGISTRATION

MAINTENANCE

MANUFACTURER SAFETY RECALLS

MILEAGE SUMMARY

POOLED VEHICLE MANAGEMENT

TAXABLE BENEFITS

VEHICLE DESCRIPTORS

Values provided are per IRS guidelines specific to the employment tax treatment of fringe benefits as referenced in IRS Publication 15-B: Employer's Tax Guide to Fringe Benefits.

TAXABLE BENEFITS REPORT

From¹ January 2020 through December 2020 [Run Report](#)

☒ Show only personal use vehicles

[DOWNLOAD](#)

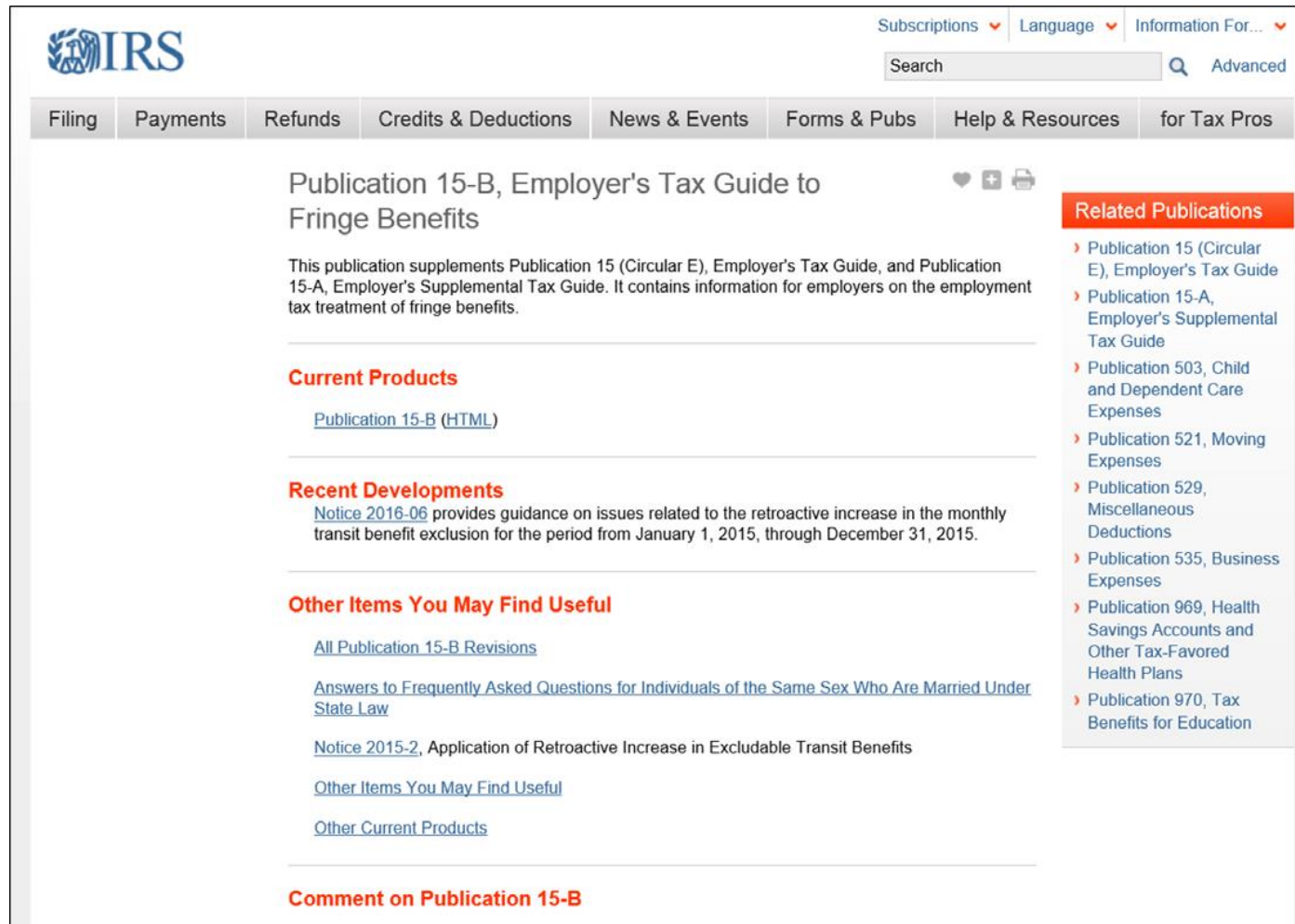
showing 434 of 434 rows

Values provided do not constitute accounting, tax or legal advice. Values provided are per IRS guidelines specific to the employment tax treatment of fringe benefits as referenced in [IRS Publication 15-B: Employer's Tax Guide to Fringe Benefits](#).

Vehicle	VIN	Customer Vehicle ID	Vehicle - Qualified	YMMS	Driver Name	D
---------	-----	---------------------	---------------------	------	-------------	---

There is a link to IRS Publication 15-B: Employer's Tax Guide to Fringe Benefits on the screen and also included on the Excel Report download.

<https://www.irs.gov/uac/about-publication-15b>



The screenshot shows the IRS website interface. At the top, there is a navigation bar with links for Subscriptions, Language, and Information For... A search bar is also present. Below the navigation bar, there is a horizontal menu with categories: Filing, Payments, Refunds, Credits & Deductions, News & Events, Forms & Pubs, Help & Resources, and for Tax Pros. The main content area is titled "Publication 15-B, Employer's Tax Guide to Fringe Benefits". It includes a description of the publication, a section for Current Products with a link to the HTML version, a section for Recent Developments with a link to Notice 2016-06, and a section for Other Items You May Find Useful with links to all revisions, frequently asked questions, and other items. A sidebar on the right lists related publications, including Publication 15, Publication 15-A, Publication 503, Publication 521, Publication 529, Publication 535, Publication 969, and Publication 970.

Publication 15-B, Employer's Tax Guide to Fringe Benefits

This publication supplements Publication 15 (Circular E), Employer's Tax Guide, and Publication 15-A, Employer's Supplemental Tax Guide. It contains information for employers on the employment tax treatment of fringe benefits.

Current Products

[Publication 15-B \(HTML\)](#)

Recent Developments

[Notice 2016-06](#) provides guidance on issues related to the retroactive increase in the monthly transit benefit exclusion for the period from January 1, 2015, through December 31, 2015.

Other Items You May Find Useful

[All Publication 15-B Revisions](#)

[Answers to Frequently Asked Questions for Individuals of the Same Sex Who Are Married Under State Law](#)

[Notice 2015-2, Application of Retroactive Increase in Excludable Transit Benefits](#)

[Other Items You May Find Useful](#)

[Other Current Products](#)

Related Publications

- Publication 15 (Circular E), Employer's Tax Guide
- Publication 15-A, Employer's Supplemental Tax Guide
- Publication 503, Child and Dependent Care Expenses
- Publication 521, Moving Expenses
- Publication 529, Miscellaneous Deductions
- Publication 535, Business Expenses
- Publication 969, Health Savings Accounts and Other Tax-Favored Health Plans
- Publication 970, Tax Benefits for Education

Comment on Publication 15-B

TAXABLE BENEFITS REPORTING

Customer Website

Data is based on unique Vehicle / Driver Name / Driver Start Date / Driver End Date combinations

- Each row is a unique combination.
- This allows for tracking of a single vehicle with multiple drivers and multiple vehicles for a single driver.

Vehicle	VIN	Vehicle - Qualified (2)	YMMS	Driver Name ▲
YK5R71	0H75ER3312873FA6P	☒	2014 Ford Fusion SE 4dr Front-wheel Drive Sedan	CRANE, WILMA
YK5R67	0H76ER3312963FA6P	☒	2014 Ford Fusion SE 4dr Front-wheel Drive Sedan	DONALDSON, ANDY
YK3R40	0H7XER1145303FA6P	☒	2014 Ford Fusion SE 4dr Front-wheel Drive Sedan	DONALDSON, ANDY

TA XABLE BENEFITS REPORTING

Customer Website



FLEET MANAGEMENT

Applicable disclosures and references to this IRS publication for each applicable column are included at the bottom of the Website page as well as on the Excel Report download.

COLUMN HEADERS

(1) Accounting Period Start Date

Can be January based on a calendar year or based on a Special Accounting Period using either November or December of the previous year per IRS guidelines

(2) Vehicle Qualified

Customer has the ability to include or exclude a Vehicle for purposes of determining "Cumulative Taxable Benefit"

(3) Vehicle In Service Date

The first date the Vehicle is available to any employee for personal use. Corresponds to "Delivered to Customer Date" per Enterprise Fleet Management (EFM) Lease Schedule.

(4) Vehicle Out of Service Date

Date EFM takes possession of the Vehicle and the vehicle is no longer in Leased Unit status

(5) Driver Start Date / Driver End Date / Driver Days In Service

Period of time Driver is assigned to the Vehicle

(6) Annual Lease Value Term Start Date

Date that can be used for purposes of determining the fair market value (FMV) of the Vehicle. This date can be updated when there is a valid Driver change or at the end of the previous 4 Year Term as defined for purposes of calculating the appropriate Annual Lease Value.

(7) Annual Lease Value Term Start Date - Input

Actual date used as determined by the Customer for purposes of determining the FMV of the Vehicle

(8) Vehicle Fair Market Value - Safe Harbor Value

Value that can be used for purposes of establishing the FMV of the vehicle. Calculated as of the "Vehicle In Service Date" using the Manufacturer's Invoice price (including Options) plus 4% per IRS guidelines.

(9) Options

Capitalized and Billed after-market equipment (AME) as of the "Vehicle In Service Date" per EFM Lease Schedule

(10) Fair Market Value - Retail Value

Black Book Retail Value as of the "Annual Lease Value Term Start Date". Value can be used when there is a valid Driver change or at the end of the previous 4 Year Term as defined for purposes of calculating the appropriate Annual Lease Value.

(11) Fair Market Value - Input

Actual FMV of the Vehicle as of the "Annual Lease Value Term Start Date - Input" as determined by the Customer for purposes of determining the "Annual Lease Value" of the Vehicle

(12) IRS Annual Lease Valuation

Annual Lease Value based on the "Fair Market Value - Input" as determined by the IRS published Annual Lease Value Table

(13) IRS Prorated Annual Lease Value - Calculated

Annual Lease Value that can be used if a Vehicle is provided to an employee for a continuous period less than an entire calendar year or Special Accounting Period per IRS guidelines

(14) IRS Daily Lease Value - Calculated

Lease Value that can be used if a Vehicle is provided to an employee for a continuous period of less than 30 days per IRS guidelines

(15) Annual Lease Value - Input

Actual Annual Lease Value used as determined by the Customer for purposes of determining the "Cumulative Taxable Benefit"

(16) Total Miles / Business Miles / Personal Miles

Miles driven, both Business and Personal, by the respective Driver as input by the Customer into the EFM website

(17) Personal Use Annual Lease Value

Amount calculated based on the Vehicle "Fair Market Value - Input" and "Annual Lease Value - Input" as determined by the Customer per IRS guidelines

(18) Fuel Cents Per Mile / Fuel Benefit

Cents per Mile as determined by the Customer for Fuel reimbursed to the Driver for purpose of calculating "Fuel Benefit" to be included in the "Personal Use Annual Lease Value" per IRS guidelines

(19) Personal Contribution

Amount paid by the Employee as reported by the Customer in the EFM website. Amount used to offset the "Cumulative Taxable Benefit" calculated per IRS guidelines.

(20) Cumulative Taxable Benefit

The Personal Use value to be assigned to the Driver per IRS guidelines calculated as: "Personal Use Lease Value" + "Fuel Benefit" - "Personal Contribution"

(21) Cumulative Taxable Benefit Per Month

"Cumulative Taxable Benefit" calculated to a per month value based on the "Driver Days In Service"

TAXABLE BENEFITS REPORTING

Customer Website

ACCOUNTING PERIOD START DATE

Can be January based on a calendar year or based on a Special Accounting Period using either November or December of the previous year per IRS guidelines.

- November through October
- December through November
- January through December

The screenshot displays the Enterprise Fleet Management interface for generating a Taxable Benefits Report. The Enterprise Fleet Management logo is at the top. Below it, the title 'TAXABLE BENEFITS REPORT' is partially visible. A dropdown menu is open, showing a list of accounting periods: December 2016, November 2016, January 2016, December 2015, November 2015 (highlighted in blue), January 2015, December 2014, November 2014, January 2014, and December 2013. To the right of the dropdown, the text 'From' and 'through October 2016' is visible. A green 'Run Report' button is located to the right of the dropdown. There are also checkboxes for 'Dis' and 'Show'.

TAXABLE BENEFITS REPORTING

Customer Website

VEHICLE QUALIFIED

Customer has the ability to include or exclude a specific Vehicle for purposes of determining "Cumulative Taxable Benefit".

TAXABLE BENEFITS REPORT

From¹ through October 2016

☐ Show only personal use vehicles

showing 136 of 136 rows

Values provided are per IRS guidelines specific to the employment tax treatment of fringe benefits as referenced in [IRS Publication 15-B: Employer's Tax Guide to Fringe Benefits](#).

Vehicle	VIN	Vehicle - Qualified (2)	YMMS	Driver Name ▲	Cust Num	Cust Name
YK18B6	0H74FR1837473FA6P	☒	2015 Ford Fusion SE 4dr Front-wheel Drive Sedan	ANDERSON, DAVE	453793	Test Company
YK33B6	REV7FW2806602T3DF	☐	2015 Toyota RAV4 Limited 4dr All-wheel Drive	ANDERSON, GEORGE	453793	Test Company
YK4R84	0H72ER2209553FA6P	☒	2014 Ford Fusion SE 4dr Front-wheel Drive Sedan	ANDERSON, KEVIN	453793	Test Company

TAXABLE BENEFITS REPORT

From¹ through October 2016

☒ Show only personal use vehicles

showing 135 of 136 rows

Values provided are per IRS guidelines specific to the employment tax treatment of fringe benefits as referenced in [IRS Publication 15-B: Employer's Tax Guide to Fringe Benefits](#).

Vehicle	VIN	Vehicle - Qualified (2)	YMMS	Driver Name ▲	Cust Num	Cust Name
YK18B6	0H74FR1837473FA6P	☒	2015 Ford Fusion SE 4dr Front-wheel Drive Sedan	ANDERSON, DAVE	453793	Test Company
YK4R84	0H72ER2209553FA6P	☒	2014 Ford Fusion SE 4dr Front-wheel Drive Sedan	ANDERSON, KEVIN	453793	Test Company

VEHICLE IN SERVICE DATE

The first date the Vehicle is available to any employee for personal use. Corresponds to “Delivered to Customer Date” per EFM Lease Schedule.

VEHICLE OUT OF SERVICE DATE

Date EFM takes possession of the Vehicle and the vehicle is no longer in Leased Unit status.

DRIVER START DATE / DRIVER END DATE / DRIVER DAYS IN SERVICE

Period of time Driver is assigned to the Vehicle.

ANNUAL LEASE VALUE TERM START DATE

Date that can be used for purposes of determining the FMV of the Vehicle. This date is defined and updated in one of three ways:

1. The initial “Annual Lease Value Term Start Date” will be the same date as the “Vehicle In Service Date”.
2. The Date can be updated to January 1 of the Calendar Year of transfer when there is a Driver change.
 - If the Special Accounting Rule is not being used, this date will always be January 1
 - If the Driver change happened on May 15, 2017 the “Annual Lease Value Term Start Date” will change to January 1, 2017.
 - If the Special Accounting Rule is being used, the date will be updated to the first day of the Special Accounting Period in which the Driver change occurred.
 - If the Special Accounting Period starts on November 1 and the Driver change happened on May 15, 2017 then the “Annual Lease Value Term Start Date” can change to November 1, 2016.
3. The Date can be updated to January 1 following the fourth full calendar year of the Vehicle / Driver combination being in service.
 - If the Special Accounting Rule is not being used, this date will always be January 1
 - If the Vehicle’s fourth year ends on May 15, 2017, the “Annual Lease Value Term Start Date” will change to January 1, 2018.
 - If the Special Accounting Rule is being used, the date will be updated to the first day of the Special Accounting Period that starts immediately before the January 1 date.
 - If the Special Accounting Period starts on November 1 and the Vehicle’s fourth year ends on May 15, 2017 then the “Annual Lease Value Term Start Date” can change to November 1, 2017 rather than January 1, 2018.

ANNUAL LEASE VALUE TERM START DATE - INPUT

Actual date used as determined by the Customer for purposes of determining the FMV of the Vehicle.

- While the calculated date as previously defined is the suggested “Annual Lease Value Term Start Date” per IRS guidelines, the customer has the option to self-select and input the actual “Annual Lease Value Term Start Date” they want to use for purposes of determining the FMV of the Vehicle.

TAXABLE BENEFITS REPORTING

Customer Website



FLEET MANAGEMENT

VEHICLE FAIR MARKET VALUE - SAFE HARBOR VALUE

Value that can be used for purposes of establishing the FMV of the vehicle. Calculated as of the "Vehicle In Service Date" using the Manufacturer's Invoice price (including Options) plus 4% per IRS guidelines.

OPTIONS

Capitalized and Billed AME as of the "Vehicle In Service Date" per the EFM Lease Schedule.

FAIR MARKET VALUE - RETAIL VALUE

Black Book Retail Value as of the "Annual Lease Value Term Start Date". Value can be used when there is a valid Driver change or at the end of the previous 4 Year Term as defined for purposes of calculating the appropriate "Annual Lease Value".

FAIR MARKET VALUE - INPUT

Actual FMV of the Vehicle as of the "Annual Lease Value Term Start Date - Input" as determined by the Customer for purposes of determining the "Annual Lease Value" of the Vehicle.

- While the calculated "Vehicle Fair Market Value" as previously defined is the suggested "Vehicle Fair Market Value" per IRS Safe Harbor guidelines, the customer has the option to self-select and input the actual "Vehicle Fair Market Value" they want to use for purposes of determining the "Cumulative Taxable Benefit" of the Vehicle.

IRS ANNUAL LEASE VALUATION

Annual Lease Value based on the "Fair Market Value - Input" as determined by the IRS published Annual Lease Value Table (right).

IRS PRORATED ANNUAL LEASE VALUE - CALCULATED

Annual Lease Value that can be used if a Vehicle is provided to an employee for a continuous period less than an entire calendar year or Special Accounting Period per IRS guidelines.

IRS DAILY LEASE VALUE - CALCULATED

Lease Value that can be used if a Vehicle is provided to an employee for a continuous period of less than 30 days per IRS guidelines.

Table 3-1. Annual Lease Value Table

(1) Automobile FMV	(2) Annual Lease
\$ 0 to 999	\$ 600
1,000 to 1,999	850
2,000 to 2,999	1,100
3,000 to 3,999	1,350
4,000 to 4,999	1,600
5,000 to 5,999	1,850
6,000 to 6,999	2,100
7,000 to 7,999	2,350
8,000 to 8,999	2,600
9,000 to 9,999	2,850
10,000 to 10,999	3,100
11,000 to 11,999	3,350
12,000 to 12,999	3,600
13,000 to 13,999	3,850
14,000 to 14,999	4,100
15,000 to 15,999	4,350
16,000 to 16,999	4,600
17,000 to 17,999	4,850
18,000 to 18,999	5,100
19,000 to 19,999	5,350
20,000 to 20,999	5,600
21,000 to 21,999	5,850
22,000 to 22,999	6,100
23,000 to 23,999	6,350
24,000 to 24,999	6,600
25,000 to 25,999	6,850
26,000 to 27,999	7,250
28,000 to 29,999	7,750
30,000 to 31,999	8,250
32,000 to 33,999	8,750
34,000 to 35,999	9,250
36,000 to 37,999	9,750
38,000 to 39,999	10,250
40,000 to 41,999	10,750
42,000 to 43,999	11,250
44,000 to 45,999	11,750
46,000 to 47,999	12,250
48,000 to 49,999	12,750
50,000 to 51,999	13,250
52,000 to 53,999	13,750
54,000 to 55,999	14,250
56,000 to 57,999	14,750
58,000 to 59,999	15,250

For automobiles with an FMV of more than \$59,999, the annual lease value equals $(0.25 \times \text{the FMV of the automobile}) + \500 .

TAXABLE BENEFITS REPORTING

Customer Website

ANNUAL LEASE VALUE - INPUT

Actual Annual Lease Value used as determined by the Customer for purposes of determining the “Cumulative Taxable Benefit”.

- While the “Annual Lease Value” can be either the lower of either the “IRS Annual Lease Valuation”, the “IRS Prorated Annual Lease Value” or the “IRS Daily Lease Value” as previously defined, the customer has the option to self-select and input the actual “Annual Lease Value” they want to use for purposes of determining the “Cumulative Taxable Benefit” of the Vehicle.

TOTAL MILES / BUSINESS MILES / PERSONAL MILES

Miles driven, both Business and Personal, by the respective Driver as input by the Customer into the EFM Website.

- Mileage data is per activity entered via the Website or Mobile application **only**.
- Corrections to Mileages can be made to individual vehicles on the Vehicle Details screen referenced on page 8 and 9 or on the mobile application. You can Bulk Update mileage by navigating to the Mileage Summary grid from the My Fleet drop down and selecting the Bulk Update tab (below).
- Mileage activity per month can be viewed by navigating to the far right of the Website screen.
- The effective month used when inputting mileage will dictate the month that it is reported in via the Taxable Benefit tool.
- For Vehicle / Driver combinations where mileage has not been entered for a specific month when the Vehicle was in service, a designation of “missing” will be given in the applicable Month’s “Odometer Error” column.

DASHBOARD
ACQUIRE
MY FLEET
SALE
BILLING
PEOPLE

CITATIONS
CLAIMS
CLIENT-OWNED
FUEL
LEASE
LICENSE & REGISTRATION
MAINTENANCE
MANUFACTURER SAFETY RECALLS
MILEAGE SUMMARY
POOLED VEHICLE MANAGEMENT
TAXABLE BENEFITS
VEHICLE DESCRIPTORS

MILEAGE SUMMARY

BY VEHICLE
BY DATE RANGE SUMMARY
BY DATE RANGE
ESTIMATED DATE RANGE SUMMARY
BULK UPDATE

DOWNLOAD
Search

showing 479 of 479 rows

Cust Num	Vehicle	VIN	Customer Vehicle ID	Driver	Effective Date	Odometer	Miles Driven ...	Personal Miles	Prev Date*
					03/13/2020			%	
578422	22KQ67	1FAHP2F82FG12...	2666	DAVID MCCRYSTAL	03/13/2020		0	%	02/29/2020
570078	22KN3B	1FMCU0GD1HU...	02	BIANCA SEARLES	03/13/2020		0	%	02/29/2020
570078	22KMNC	1FMCU0GD5HU...	07	JOSHUA THOMPSON	03/13/2020		0	%	02/29/2020
570078	22KN3T	1FMCU0GD5XHU...	06	AARON GOODE	03/13/2020		0	%	02/29/2020

TA XABLE BENEFITS REPORTING

Customer Website



PERSONAL USE ANNUAL LEASE VALUE

Amount calculated per IRS guidelines based on the Vehicle "Fair Market Value - Input", "Annual Lease Value - Input", "Business Miles" and "Personal Miles" as input by the Customer.

IRS Annual Lease Valuation (12)	IRS Prorated Annual Lease Value - Calculated (13)	IRS Daily Lease Value - Calculated (14)	Annual Lease Value - Input (15)	Total Miles (16)	Business Miles (16)	Personal Miles (16)	Personal Use Annual Lease Value (17)
\$6,350	\$522	\$1,253	522	660	577	83	\$66

FUEL CENTS/MILE / FUEL BENEFIT

Cents per Mile as determined by the Customer for Fuel reimbursed to the Driver for purpose of calculating "Fuel Benefit" to be included in the "Personal Use Annual Lease Value" per IRS guidelines.

- The annual lease value doesn't include the value of fuel provided to an employee. The value of the fuel must be included separately and can be valued at either:
 - 5.5 cents per mile for all miles driven by the employee.
 - The actual amount reimbursed to the employee.
 - Fleet Average Cents per Mile as defined by IRS guidelines.
- 5.5 cents per mile is the default value used but this can be updated by the Customer by selecting the Override Fuel Benefit Calculation button and manually entering a value in the Fuel Benefit column.

Fuel Cents Per Mile (18)	Override Fuel Benefit Calculation (18)	Fuel Benefit (18)
	☐	
5.5	☐	47
5.5	☐	55
5.5	☐	104
5.5	☐	45
5.5	☐	65
5.5	☐	27

TA XABLE BENEFITS REPORTING

Customer Website

PERSONAL CONTRIBUTION

Amount paid by the Employee as reported by the Customer in the EFM Website. Amount used to offset the "Cumulative Taxable Benefit" calculated per IRS guidelines.

- Customer can input a Driver's "Personal Contribution" amount by Vehicle assignment, by Month by navigating to the far right of the Website screen.

Vehicle	VIN	Vehicle - Qualified (2)	YMMS	Driver Name	November 2015 Personal Contribution
YK12B9	0H71F51290511FA6P	☒	2015 Ford Fusion SE 4dr Front-wheel Drive Sedan	NICHOLSON, JEN	
YK3R24	0H7XER1145133FA6P	☒	2014 Ford Fusion SE 4dr Front-wheel Drive Sedan	PALMER, MANDY	200
22372K	0H72GR2127933FA6P	☒	2016 Ford Fusion SE 4dr Front-wheel Drive Sedan	LANE, MANDY	150
					0

CUMULATIVE TAXABLE BENEFIT

The Personal Use value to be assigned to the Driver per IRS guidelines calculated as: "Personal Use Lease Value" + "Fuel Benefit" - "Personal Contribution".

- Amount is the calculated fringe benefit value for the respective 12 month reporting period that is to be used to input into the Customers payroll system for purposes of calculating income tax on the personal use mileage driven by the driver.

CUMULATIVE TAXABLE BENEFIT PER MONTH

"Cumulative Taxable Benefit" calculated to a per month value based on the "Driver Days In Service".

- Amount that can be used by the Customer to update their payroll system on a monthly basis.

Vehicle	VIN	Vehicle - Qualified (2)	YMMS	Driver Name	Cumulative Taxable Benefit (20)	Cumulative Taxable Benefit - Per Month (21)
YK12B9	0H71F51290511FA6P	☒	2015 Ford Fusion SE 4dr Front-wheel Drive Sedan	NICHOLSON, JEN	\$497	\$60
YK3R24	0H7XER1145133FA6P	☒	2014 Ford Fusion SE 4dr Front-wheel Drive Sedan	PALMER, MANDY	\$808	\$67
22372K	0H72GR2127933FA6P	☒	2016 Ford Fusion SE 4dr Front-wheel Drive Sedan	LANE, MANDY	\$1,607	\$135

Reporting is available in both CSV and Excel formats and both can be downloaded on demand at any time.

TAXABLE BENEFITS REPORT

From¹

January 2020

 through December 2020

Run Report

☒ Show only personal use vehicles

DOWNLOAD

CSV

Excel

Values provided do not constitute accounting, tax or legal advice. Values provided are per IRS guidelines specific to the employment tax treatment of

Vehicle	VIN	Customer Vehicle ID	Vehicle - Qualified (2)	YMMS	
---------	-----	---------------------	-------------------------------	------	--

