

Time and Expense Categories

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1 Time and Expense Categories

This screen allows you to maintain the Time and Expense categories within the system. When enabled, these are used by the driver to enter time and expense information against a job during the processing of the job, in addition to all the job-related information on the job.

You can use this screen to view, create and edit T&E Categories.

You can filter data by:

- *Description* - the description to be displayed when used.
- *Type* - a drop-down list of *Time* or *Expense*.

Once you have entered the criteria, click **Search**. The screen will display a table of all the matching data. Any plain text boxes will match data that contains what you enter as the criterion.

Find

New

Description:

Type: -- Select --

Clear

Search

Time and Expense Categories

Records Per Page: 10

Description	Type
Charge	CHARGES
Del Test 1	EXPENSE
Maintenance	EXPENSE
Meal	EXPENSE
Supplies	EXPENSE
Billable	TIME
Travel	TIME

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T&E Categories Search Panel and Results table

Each category found is displayed on a single line in the results table.

The results table has the following columns:

- *Description* - the category description to be displayed when used.
- *Type* - The type of the category, either Time or Expense.

1.1 New Categories

You can create new categories by pressing the provided **New** button at the top of the screen.

Category Details

Save

Close

Description:

Type: -- Select --

New Category Pop-up

You can enter the following details:

- *Description* - the description to be displayed when used.
- *Type* - a drop-down list of Time or Expense.

When changes are complete, you can click **Save** to save the changes, or **Close** to close the pop-up without saving the changes.



1.2 View/Edit Categories

You can view and edit the categories by clicking the **Select** button against the line in the table. The screen will display a pop-up showing all the details of the category.

Category Details

Edit

Delete

Close

Description: Maintenance

Type: Expense

View/Edit Category Pop-up

You can edit the category by clicking the provided **Edit** button.

You can edit the following fields:

- *Description* - the description to be displayed when used.
- *Type* - a drop-down list of Time or Expense.

When changes are complete, you can click **Save** to save the changes. If you don't want to save your changes, you can click **Cancel** to stop editing, or **Close** to close the pop-up without saving the changes.

You can click the **Delete** button to delete the category - the screen will ask you to confirm before the category is deleted.

