CompanyMileage Support Q & As

Q: How can a user reset their CompanyMileage password if they are having trouble logging in?

A: Users should use their email address as the username and click the "Forgot Password" link on the login screen to reset their password. If they experience issues with resetting, they must contact their manager or business administrator for help, as CompanyMileage support is not authorized to reset passwords directly.

Q: Why does the mileage calculation for the same trip vary on different days in CompanyMileage?

A: The mileage variance is due to a system setting that chooses the route based on either the shortest distance or the shortest time. When "shortest time" is selected, the system uses an algorithm that factors in average traffic conditions, causing the route—and therefore the mileage—to vary by day or time. This means the mileage between the same two points can differ, leading to different trip distances and deductions on different days. Selecting "shortest distance" offers more consistent mileage but may not reflect real-world traffic conditions. The miles-to-work deduction is calculated at trip entry time, while the profile estimate updates when the profile loads.

Q: How can I update a department name in CompanyMileage without changing the department code?

A: To update a department name while keeping the department code unchanged, go to Company Settings → Advanced Custom Fields. Click Edit on the "Do NOT change Department Code" field, scroll down to the department list, then click Edit next to the department you want to rename and update its description.

Q: How can I get a report listing all users who have accessed CompanyMileage (trip or expense) within a specific date range?

A: You can run usage reports by navigating to the Reports section, then selecting Other Reports. From there, you can specify the desired date range to generate a list of users who have accessed CompanyMileage within that period.

Q: How does the CompanyMileage app handle address selection, and can users add or pre-favorite addresses in their personal address book for quicker trip logging?

A: Users can select addresses from three options when starting a trip: Nearby Addresses, Office, Manually Enter Address, or Capture Address. Nearby Addresses allow access to both the Company Address Book and the user's Personal Address Book within CompanyMileage. When a user adds a new address during travel, it is saved to their Personal Address Book automatically. However, there is no direct way to pre-favorite or pre-add existing addresses to the Personal Address Book; users must add new addresses manually or rely on the app's suggestion of nearby addresses during trip logging. For more details, users can refer to the online guides linked in the support emails.

Q: Why can't I select a previous date to add a trip using Check-In, Check-In Log, or Quick Capture?

A: Check-In, Check-In Log, and Quick Capture are designed for real-time entry and do not allow adding trips for previous days. To add a trip for a prior date, please contact your manager for assistance.

Q: Why can a user log into the desktop site but not the mobile app, even after resetting the password and reinstalling the app?

A: First, confirm the user is manually typing their password and not using an auto-filled password saver, which can cause login issues. As an admin, you can reset the user's password to a new one and have them try logging in again. The authentication code is the same for both the website and the mobile app—if the login works on one, it should work on the other—so ensuring the correct password is manually entered usually resolves the problem.

Q: New employees are not receiving notifications to change their passwords upon first login. Has this feature been removed, and how can it be enabled?

A: The first-time login password change confirmation may be disabled. To enable it, go to Control Panel > System Users > User Field Settings and switch the option for first-time login confirmation to "Yes." This will prompt new users to change their passwords when they first log in.

Q: How can I view detailed trip payment information for employees after a close period has been approved?

A: You can view detailed payment and trip information for any employee by navigating to the Reports section and selecting Payment Reports. This report provides comprehensive details even after the close period has been approved.

Q: Can an admin assistant submit mileage reimbursements and trips on behalf of another user, such as a CEO, and how is this set up?

A: Yes, an admin assistant can submit mileage reimbursements and trips on behalf of another user. To set this up, the admin assistant must be designated as a Supervisor in their user profile. Then, assign the admin assistant to the appropriate approval group and give them specific roles—such as Trip Entry/Edit and Expense Entry—via the Assign Manager settings. Finally, add the CEO as a group member. Once configured, the admin assistant can select the CEO from dropdown menus when entering trips or expenses to submit on their behalf.

Q: Why does the quick capture place the pin incorrectly on addresses, and how can I fix the issue so the correct address appears consistently without having to manually adjust it every time?

A: The pin placement for addresses can sometimes default to an incorrect location due to how the system validates with mapping services like Google. To fix this, as a company administrator, you can manually drag the pin to the correct location and save the address without clicking "validate." This changes the status to "User Modified," ensuring users see the corrected address option nearby. Additionally, adjusting the import settings to update address information only when certain fields change (e.g., Address 1) prevents the system from revalidating and resetting the pin daily, reducing the need for repeated manual corrections. If needed, support can assist you in modifying these settings.

Q: Why do I get an error when adding approval groups with import values that include commas, and how can I resolve it?

A: When import values contain commas, the system interprets them as multiple separate entries, which can cause errors. To resolve this, remove any commas from the import values so that each name is entered as a single value without commas. Then, try adding the approval groups again. If errors continue, check existing entries for commas separating names, remove those commas, and retry.

Q: What should I do if the Check-In feature doesn't register properly at a large or complex location?

A: Sometimes, Check-In may have difficulty registering correctly in large or geographically spread-out locations due to GPS limitations. If this happens:

- Use the New Trip option to manually enter your trip details, including start and end points and mileage.
- There is no mileage limit on trip entries, so you can enter any legitimate distance.
- If problems continue, verify the trip details and reach out to support for further assistance.

Q: What should I do if Face ID appears to work on my iPhone but fails within the CompanyMileage app, requiring manual password entry?

A: If Face ID on your iPhone appears to recognize you but still triggers a login error in the CompanyMileage app, follow these troubleshooting steps:

1. Reset biometric settings in the CompanyMileage app:
    - Open the app and manually log in with your password.
    - Go to the app's Face ID/biometric settings and disable biometric login.
    - Log out and fully close the app.
    - Reopen the app, log in again, and re-enable Face ID.
2. Adjust iPhone Face ID settings:
    - Go to iPhone Settings > Face ID & Passcode > Other Apps.
    - Turn Face ID off for CompanyMileage, restart your phone, then turn it back on.
3. Reinstall the app:
    - Delete and reinstall the CompanyMileage app to clear any corrupted cache or configuration errors.

4. General Face ID checks:
    - Ensure the camera is clean and unobstructed.
    - Avoid harsh lighting or extreme angles when using Face ID.
    - Update your iPhone to the latest iOS version.

Q: How can Company Admins be given the ability to edit trip mileage for detours?

A: To enable Company Admins to edit trip mileage:

1. Ensure the "Co Admin Administrative rights" option is enabled in the user's profile. This setting allows access to trip mileage editing.
2. Once enabled, users must log out and log back in to see the new field.
3. Trip mileage can be overridden by navigating to Approvals > Edit Trips and entering the total miles to be reimbursed in the Override field.

Q: What should I do if a new user can't log into the SureMobile app using SSO and is being incorrectly prompted to reset their password?

A: If a new user accessing the SureMobile app via SSO is being prompted to reset their password (which should not happen based on your organization's settings), follow these steps:

1. Confirm that the user is logging in via the correct SSO URL (e.g., https://yourcompany.companymileage.com).
2. If the app is unresponsive or frozen, instruct the user to delete the app, reboot the device, and reinstall it.
3. If the issue persists, set up a test user using the same SSO flow for diagnostic purposes

Q: We enabled 2-Factor Authentication (2FA) for all users but noticed they can still disable it. Can we restrict that ability to admin users only? How can we enforce 2FA across all users?

A: Currently, individual users can enable or disable 2FA for their own accounts. This setup is intended to support smaller organizations that may not have a central identity provider (IdP). To enforce 2FA across all users and prevent them from turning it off, we recommend enabling Single Sign-On (SSO). With SSO, your identity provider can centrally manage authentication policies — including mandatory 2FA — and restrict users from disabling it. SSO integration is available at no additional cost, and we're happy to assist with setup or coordinate with your IT team.

Q: Is there a way to unreject and then approve mileage in CompanyMileage, or does the employee have to re-enter the rejected trips?

A: Rejected trips do not need to be re-entered. To resubmit them, the employee can go to the *Rejected Trips* section—by clicking the linked number next to Rejected Trips on the web, or by navigating to *Trips* > *Rejected Trips* in the SureMobile App. From there, the user can click *Edit* to make necessary changes, select one or more trips, enter a reason in the memo field for each, and click *Repost*. The reposted trips will then appear in the *Trips Awaiting Approval* screen, where the supervisor can approve them.

Q: We're considering switching to "shortest distance" for more consistent mileage payments. Is there a way to calculate trips using both "shortest time" and "shortest distance" for comparison? Would calculating shortest time in CompanyMileage and shortest distance using MapQuest give the same result as doing both in CompanyMileage?

A: You can compare trip calculations by switching the routing setting in CompanyMileage. However, you must change the setting *and* log out and back in before booking trips, as you can't select shortest time or distance per trip individually. If you're using MapQuest Online, you'll need to change the setting from "shortest time" to "shortest distance" under *Route Planner* > *Route Settings* before entering addresses. While the exact results may vary slightly based on route selection, the calculations should be similar.

Q: How can I see when my last mileage entry was?

A: Go to the **Reports** tab in your CompanyMileage account. The **Detail Report** will show all information concerning trips that have been booked, including your last mileage entry.

Q: Do I need to add a budget code for users to use, or is that something CompanyMileage does for us?

A: You can add a new budget code yourself by going to **Accounting Setup > Budget Code**, then enter the following:

- **Budget Code Name**
- **Budget Code** (include the A or F)
- **Description** = MILEAGE
- **Import Value** = same as the Budget Code
  Then click **Add Budget Code**.

Q: Should staff be able to see their logged trips and approval status in the Personal Summary section, and why might it appear empty?

A: Yes, staff have access to reports and can view all trips they've entered. In the **Personal Summary** section, they should see totals for trips such as "Awaiting Approval," "Awaiting Payment," or "Rejected." If that section shows all zeros or appears empty, it means there are currently **no trips in those statuses**. Staff can also click on those numbers (when populated) to see trip details.

Q: How can I manually enter a trip on behalf of a staff member, especially if they are terminated?

A: Go to the **Input Grid** and select **New Trip** to add a trip for another user. If the employee is terminated, first change their status to **Active** in their user profile. Once the trip is entered, you can set their status back to **Terminated**. For further guidance, click the **Question Mark** icon on the right-hand side of the screen.

Q: Why am I getting an error when creating a trip using Quick Capture?

A: Before clicking **Get Mileage**, make sure you select an address by tapping **Select Nearby Address** and choosing from the address book. If the needed address isn't listed, tap the field above for more options like **Capture** or **Manually Enter Address**. This may need to be done for both the **starting** and **destination** addresses. Quick Capture logs your coordinates at the moment it's used and offers nearby addresses to choose from—if you skip selecting one, it can result in an error.

Q: Is there a report that shows whether a trip location was entered using Quick Capture or manually?

A: Yes, use the **Custom Excel Detail Report** and select the **Trip Entry Method** field. This will show whether each trip was entered via Quick Capture, manual entry, or another method.

Question:
How can I pull a report from 1/10 to the current date using key words like Eaton, Pasadena, and Altadena?

Answer:
There isn't a report that filters directly by City, but you can run the Custom Excel Detail report, select the date range from 1/10 to the current date, and choose the fields you want in your output. After exporting, filter the resulting spreadsheet by your key words (Eaton, Pasadena, Altadena) to get the information you need.

Question:
Can an employer charge the client $0.67 per mile but only reimburse drivers $0.27 per mile, even though the drivers use their own cars, gas, tires, and insurance?

Answer:
As a software company, CompanyMileage cannot provide guidance on individual organizations' mileage policies. You will need to check with your company administrator or leadership for clarification on your specific mileage reimbursement policy.

Question:
How can approval authority be delegated to cover a manager's team during their absence?

Answer:
Typically, the covering approver is assigned as a manager of the group. If the covering approver is already set as a secondary manager for that group, they can view and approve the team's items by switching their approval dashboard view to "Secondary Groups." This enables them to approve on behalf of the absent manager.

Question:
How can a user update their name and email address shown on the main page of their organization's account?

Answer:
The user can update their name and email by going to Company Settings and selecting Manage Contacts. From there, they can make the necessary changes.

Question:
What do the different entry methods like "Quick Capture (Manual, Manual)" and "Quick Capture (Captured, Manual)" mean when running a report?

Answer:
The text in parentheses indicates how the starting and destination addresses were recorded:

- **Manual** means the address was added using the "Add to Route" option when not physically at the location.
- **Captured** means the address was automatically captured while physically at the location.

Examples:

- *Quick Capture (Manual, Manual)*: Both addresses were manually added.
- *Quick Capture (Captured, Manual)*: Start address was captured physically; destination was manually added.
- *Quick Capture (Captured, Captured)*: Both addresses were captured physically.
- *Quick Capture (Manual, Captured)*: Start address manually added; destination captured physically.

The "Add to Route" option allows users to add addresses they may have missed capturing on site.

Question:
Why did a user's "Miles to Work" value change from 18 miles last month to 19 miles now, even though the home and work addresses were revalidated and the previous commute deduction was 17.2 miles?

Answer:
The system calculates the commute deduction at the time each trip is entered, while the "Miles to Work" value shown in the user's profile is an estimate recalculated when the

profile loads. Updates in mapping data from MapQuest—such as new coordinates, road changes, closures, or openings—can cause route and mileage calculation differences over time. This design means mileage values may vary slightly as the mapping system updates.

Question:
How can an existing user be given access to Quick Capture on the mobile app if it was only available during initial setup?

Answer:
The organization is already set up to allow Quick Capture on the mobile app. The user can enable Quick Capture by selecting this input preference in their mobile app under Settings > User Preferences. However, if the user has any trips marked as "Awaiting submission," they must first submit those trips before changing their input preference to Quick Capture.

Question:
How can a user resolve a "Premise Level Accuracy" validation error for an address to prevent it from recurring?

Answer:
This error means the address accuracy does not meet the system's standards. To fix it, the user should manually adjust the placement of the pin on the map to the correct location and then save the address. This ensures the address meets the required accuracy for future validations.

Question:
How can a user manage or clear the list of all past months displayed in SureMobile when reviewing trip confirmations?

Answer:
On SureMobile, users cannot remove past months from the view. However, they can go to **Reports > Payment Reports** to see all trips that have been marked as Paid, which helps track confirmed trips. If further assistance is needed, support is available to help.

Question:
Is the approval group number/value used for anything other than importing data, and how should users in multiple approval groups be handled during import? Also, does the

temporary password in the import template reset existing user passwords or only set passwords for new users?

Answer:
The approval group number/value is primarily used for importing data and is not referenced elsewhere. To simplify imports, the Group Name, Number, and import value can all be the same if desired. When assigning users to multiple approval groups, you create a separate row for each group the user belongs to. Regarding passwords, the temporary password field during import only sets passwords for new staff; it does not reset passwords for existing users.

Question:
Why do two report batches sometimes generate during payroll runs, with one batch showing zero-dollar trips, and how does the home-commute deduction setting affect this?

Answer:
The system is set to process zero-dollar trips in a separate payment batch, which is why two batches sometimes appear—one with payable amounts and one with zero-dollar trips labeled with a “-0” suffix. Trips result in $0 when the start and end address are the same or when a home-commute deduction is applied, which excludes mileage for trips starting or ending at home. Many clients use this deduction to exclude commuting mileage, often creating zero-dollar trips. Your organization currently does not apply the home-commute deduction but can choose to enable it if desired. This setting can be adjusted in the Control Panel under Company Settings.

Question:
If a trip taken in December is entered late in January, which reimbursement rate will apply—the old rate or the new IRS rate effective January 1st, 2025?

Answer:
Reimbursement rates are based on the trip date, not the entry date. Trips dated before January 1st, 2025, will be reimbursed at the old rate, even if entered later. Trips dated January 1st, 2025, or after will be paid at the new IRS rate.

Question:
Is there a way to lock or restrict mileage entry on the user end after a specific date or time

(such as after the payroll period closes), so late entries are prevented, especially for biweekly payroll cycles?

Answer:
There isn't a direct feature to disable mileage entries after a certain date/time. However, you can control which trips are paid by setting an Activity Start and Activity End date when closing the payroll period. Even if late entries are approved, trips outside the closed period won't be marked as closed or paid. Additionally, trips must be approved by a manager before they are included in the Close Period process; unapproved trips remain in "Posted" status and won't be paid until approved. This process can be managed every payroll cycle but does not automatically lock user input after a cutoff time.

Question:
Why does the Quick Capture feature sometimes show an incorrect address, and how can the correct address be entered or saved?

Answer:
The Quick Capture feature uses coordinates sent to MapQuest to find a nearby address, which may not always be the exact correct address. On the Create Trip screen, you can modify the address by selecting a nearby address from the address book or manually entering the correct address. If manually entered, make sure to toggle the "Add to Address Book" option on to save the address for future trips. A video tutorial for this process is available in the Video Gallery on the CompanyMileage website.

Question:
Is there an instruction manual or resources available for supervisors on how to approve employee travel in CompanyMileage?

Answer:
Yes, supervisors can access instructional videos and an online help guide by logging into CompanyMileage and clicking on the Support section in the lower left corner of the screen. There, they will find the Video Gallery with videos on approving mileage and expenses, as well as the Supervisor Manual for detailed instructions.

Question:
Can the date of a Quick Capture trip entry be changed after it has been entered, and what can a supervisor do if the date is incorrect?

Answer:
The trip date cannot be changed once entered. The supervisor can reject the trip, prompting the user to re-enter it with the correct date using the app's New Trip feature or web entry methods. Afterward, either the supervisor or user can delete the rejected incorrect entries.

Question:
What user access level should be assigned to a colleague who needs to run detailed reports but does not supervise employees or need full admin rights?

Answer:
Assign the user the Company Admin role but uncheck the permissions she doesn't need, such as adding staff or accessing system settings. This allows her to run reports for all staff without full administrative privileges.

Question:
Why are employee location pins not dropping precisely where they are parked in the mileage app, and how can the accuracy be improved? Also, how can an approved override mileage be applied if the trip shows calculated miles instead?

Answer:
Pin inaccuracies often occur due to weak signals from WiFi, Bluetooth, or cellular networks, as the device uses these to triangulate location. To improve accuracy, ensure the SureMobile app has Precise Location enabled in device settings, enable WiFi and Bluetooth, and wait 30 seconds to a minute after opening the app before using Quick Capture. If the returned address is incorrect, users can manually enter the correct address or select one from the address book during trip creation.

Regarding override miles, if a trip shows calculated miles but override miles should apply, on the Trips Awaiting Payment screen, check the trip and click the 'Revert all Checked to Override Miles' button to apply the override mileage.

Question:
Why does the system show a user's name instead of "Home" for their home address, and how can I identify other users who have their home address saved in their personal address book?

Answer:
The user has their personal home address saved in their address book and is pulling it from

there instead of using the Home shortcut icon on input screens. Because the coordinates match between their profile and personal address book, the system recognizes it as their home address and subtracts the home-to-work commute for trips involving that location. You can run the "Home Address in Personal Address Book Report" under Reports > Other Reports to see which users have their home address saved this way.

Question:
Is it possible to see the last time a user logged in and approved their mileage, and what reports can help with this research?

Answer:
Yes, you can use several reports:

- The **User-Last Login Report** under Other Reports > Change Audit Reports shows the last login time for users.
- The **Mileage Reports - Custom Excel Detail Report** (and similarly the Expense Reports) can be filtered by clearing dates, setting Status to Approved, and selecting the manager's approval group. Make sure to include the Approved By and Approved Date fields.
- The **Outstanding Approval Report** under Approval Reports, filtered by the manager's approval group, shows the total number of trips and expenses waiting for approval.

Let support know if you need further assistance.

Question:
How should departments be added so that users can select them when entering mileage in the app?

Answer:
Departments need to be added in two places for the company's configuration:

1. In **Company Settings** under Manage [Company Name or Grant].
2. In the **Control Panel** under Accounting Setup > Field Staff Department, which controls the options users see on the trip screen.

Make sure departments are added in both locations to appear correctly in the app.

Question:
Is there a feature in CompanyMileage that can notify users by email about a new mileage rate change?

Answer:
Yes, you can add a Company Message to the Users Control Panel announcing the rate change. When setting up the message, you also have the option to email it directly to users.

Question:
What is the best way to download all receipts for expenses within a specific date range and how can a user pull a report of all mileage awaiting payment, including late submissions?

Answer:
To download all receipts for expenses within a specific period, go to **Reports > Expense Reports > Expense Receipt Attachment Archive**. Enter the desired date range, click **Show**, select all users by checking the box in the column header, and then click **Download** to receive a ZIP file of all attachments.

To review all mileage awaiting payment, go to **Mileage Reports > Custom Excel Detail Report**. In the filter options, set **Status** to include *Posted*, *Approved*, and *Reviewed* (depending on what qualifies as "awaiting payment"). This ensures that even late-entered mileage is included.

Question:
How should a user properly use the Check-In feature in the mileage app to avoid losing trip entries, and where can they find instructions?

Answer:
When using the Check-In feature, the user should wait until they arrive at their destination to enter the trip. At that point, they should select the starting location and then the current location as the destination. This ensures the trip is recorded correctly. If Check-In is started at the beginning of the trip instead of at the end, entries may not save as expected.

Question:
How does a user properly include a reason when rejecting mileage from the Approval Dashboard?

Answer:
To reject a trip and include a reason, the user should check the box next to the trip, enter the rejection reason in the **Memo Box**, and then click **Reject All Checked**. This ensures the reason is saved and associated with the rejected entry.

Question:
Can an approver or administrator change the amount on an expense entry before paying the user?

Answer:
No, only the user who originally entered the expense can change the amount. The expense must be **rejected**, then **edited by the user**, and it will need to go back through the approval process before it can be paid.

Question:
Why were a specific user's approved expenses not paid when all others were processed, and what should the user do differently to ensure payment?

Answer:
The issue could be that the user selected a **Non-Reimbursable** payment type—specifically, **Documentation Only**, **Other**, or **Company Credit Card**. These types do **not** trigger payment unless you also close Non-Payables.

To ensure reimbursement, users must select either **Personal Credit Card** or **Cash/Check** as the **Payment Type** when entering expenses. Only those types are treated as reimbursable by the system and included in your regular monthly closings.

Question:
How can a user identify who approved mileage for a former employee?

Answer:
To find out who approved a user's mileage (including for termed employees), run the **User Trip Action/Memo History Report**:

- Go to **Reports > Other Reports**
- Select **User Trip Action/Memo History Report**
- Filter by the **user** and the relevant **date range**

This report will provide detailed trip activity, including **who approved** each trip and when.

Question:
How can a user generate a report showing all mileage entries for a new employee, including the dates entered, approval status, and whether the supervisor can view and approve those entries?

Answer:
To generate the report:

1. Go to **Mileage Reports** and run the **Custom Excel Detail Report**.
2. Apply the necessary filters.
3. Scroll down to **Report Optional Fields** and select:
   - Date Entered
   - Approved By
   - Approved Date
4. Click **Generate**.

If the employee is part of the supervisor's approval group, the supervisor will be able to see the employee's trips when logged in.

Question:
Why are some expenses visible to a user in the mobile app but not appearing in reports or to approval managers?

Answer:
These expenses may already be approved and awaiting payment. If reporting filters such as period start and end dates exclude their posted dates, they will not appear in standard reports. To view them, use a detailed history or memo report that shows the full expense lifecycle, including posted dates, and ensure reporting dates are wide enough to capture all relevant data.

Question:
How can a user update the mileage reimbursement rate to a new amount effective on a future date?

Answer:
To update the mileage rate, go to the setup section and select the option to assign rates. Enter a description, the new rate amount, and the desired start date. Then, click to add the new custom rate. The updated rate will automatically take effect on the specified start date.

Question:
Can administrators set the Check-In Log as the default entry method in the app and disable other options?

Answer:
Yes, administrators can limit user options to only the Check-In Log by adjusting settings in the mobile configuration panel. This can be done by navigating to the control panel, then to the mobile settings section, and updating the preferences accordingly. This ensures only the desired entry method is available to users.

Question:
Can a user apply different work addresses based on trip dates, such as using an old office location for past mileage and a new one for future entries?

Answer:
The system only allows a single office location to be active per user profile without supporting effective-dated address changes. As a result, once the office address is updated, the new home-to-work commute deduction applies to all trips—past and future—regardless of the actual trip date. Historical address handling must be managed manually if differentiated deductions are required.

Question:
Can a receipt be added to an expense after it has been approved and paid?

Answer:
No, once an expense has been paid and moved to history, it can no longer be modified, and additional receipts cannot be attached.

Q: Can a user attach a receipt to an expense that has already been approved and paid?
A: No, once an expense has been paid and is in the history, it cannot be modified or have a receipt added.

Q: Can a user download CompanyMileage training videos to host on their own company training site?
A: No, CompanyMileage generally does not provide direct links or files for download. Accessing videos through their site ensures staff view the most up-to-date version and enables tracking of employee completion.

Q: Why can't a department be deleted in CompanyMileage, and how can a user reassign users from that department?
A: A department cannot be deleted if it is still assigned to any user or Company Address—even if the users are terminated. To delete the department, all users must first be reassigned. To do this:

1. Go to **System Users**.
2. Select the **Division** of the department to be closed.
3. Select the **Department** to be closed.
4. Set **Status** to **All**.
5. Click the **Mass Update** box.
6. Choose **Change Department** for all selected users.
7. Under Department, select **All Department** if removing the assignment.
8. Check the box next to each user to update.
9. Click **Update**.

Once all users are reassigned, the department can be deleted.

Q: Can a terminated user's trips still be reviewed and paid in CompanyMileage?
A: Yes, even if a user is marked as terminated, their submitted trips will remain available in the system for approval and payment. Termination only affects their ability to log in, not the status or availability of their pending expenses.

Q: How can a user view all active employees, their home addresses, and the distance from home to office in CompanyMileage?
A: Navigate to **Reports > Other Reports**, then select the **Excel Employee Report**. The home-to-office commute distance can be found in **Column N**, labeled **Home to Office Commute Distance**.

Q: If multiple managers are assigned to an approval group in CompanyMileage, do all need to approve a record, and how can a manager ensure they have access to view employees?
A: No, only **one** manager needs to approve a record. Once approved, the record's status updates and it disappears from the approval screen for others.

To ensure a manager can view employees in their approval group:

- The supervisor must be assigned to the group **with the Manager role**.
- You can check and update this in **Manage Approval Groups** by clicking **Edit** next to the group and assigning the appropriate manager.

If a manager doesn't see any users to report on, confirm they have the Manager role and that users are correctly listed as group members.

Q: What should a user do if CompanyMileage allows entry of destinations but won't calculate mileage or allow saving?
A: Check if any required fields have red boxes around them—even if they appear to be filled. If so, click (or tap) inside that field, then click another field to trigger validation. After that, click **Get Mileage** and then **Submit**. This should resolve the issue.

Q: Why can some users no longer see their mileage entries in CompanyMileage?
A: Once mileage entries are approved and processed for payment, they are moved to the system's history and no longer appear on the Awaiting Payment screen. Users can view past, paid mileage by going to **Reports > Payment Report**, clicking **Generate**, and then **Download** to open the PDF report.

Q: Is there a report that shows when a mileage trip was approved, including the date and time of approval?

A: Yes. Your manager can run the **User Trip Action/Memo History** report. This report can be filtered by user and date range and will show a timestamp for every action on each trip, including when it was saved, approved, paid, and more. The results are sorted newest to oldest.

Q: My input mileage is gone. Where can I find it?

A: Once mileage has been **Approved**, it will appear on the **Awaiting Payment** screen. After it has been processed for payment, it will no longer show there, but you can view past, paid mileage by going to **Reports** → **Payment Report**. Click **Generate** and then **Download** to open the PDF report.

If you have questions about the actual payment, please contact your manager or business office.

Q: Do rejected trips automatically get removed from reports, or does the admin need to delete them?

A: Rejected trips do not appear on reports automatically because they are excluded by their status. You can view rejected trips separately by navigating to the Trips – Rejected section. No admin action is needed to remove them from reports.

Q: How can a new user obtain admin access to the system if they are not already listed as an approved contact?

A: The new user should contact an existing Company Admin to grant them admin access. They can reach out to any current company administrators to have their account added.

Q: Why are Trip Start and End times not showing up in my report despite selecting the relevant fields?

A: The report's trip entry method affects the availability of start and end times. Trips entered via the "New Trip" method on web or mobile do not include time fields because the system settings disable user entry of trip times. Only trips entered using the "Check-In" method include start and end times in reports. To see trip times, ensure trips are entered using the Check-In method.

Q: How can a user restore the address autocomplete feature when it stops working in the app on an iPad?

A: If the address suggestion (search ahead) function is no longer appearing, the user should uninstall and reinstall the app to reset the local cache. This often restores the autocomplete functionality for address fields.

Q: How can mileage be tracked for a user without providing reimbursement?

A: To track mileage without reimbursing the user, set an override rate of 0.00 in their profile. This allows trip data to be recorded for reporting purposes, while ensuring no reimbursement is issued. All unpaid trips will automatically reflect zero reimbursement once this rate is applied.

Q: Can the system prevent users from entering trips older than 30 days, and can that rule be overridden or affect manager approvals?

A: Yes, you can enable a setting that blocks users from entering trips older than 30 days using a rolling window. This rule cannot be overridden without changing the setting itself. Alternatively, you can choose a setting that allows older trips but flags them for managerial review. This setting only affects entry; managers can still approve trips at any time regardless of their age.

Q: Why is the billing address appearing instead of the service address for patients in the app, and how can it be corrected?

A: The addresses displayed in the app are based on data provided to CompanyMileage by the organization. If billing addresses are appearing instead of service addresses, it's likely due to how the data is filtered in the file feed. To correct this, the organization's IT team or whoever manages the data extracts should modify the feed to include the service address instead of—or in addition to—the billing address.

Q: How can an administrator edit the miles on a trip after it has been reviewed and rejected?

A: Once a trip is rejected, it must be reposted from the "Trips – Rejected" section. After reposting, the trip returns to "Awaiting Approval" status. At this point, it can be edited by the user in the Input Grid or by the administrator using the Approval Dashboard or Edit Trips screen.

Q: Can a user be logged into two different admin accounts on the same computer?

A: Yes, a user can log in to two different admin accounts simultaneously by using two separate browsers.

Q: What should a user do if a trip requires selecting a specific person (staffer or resident), but none applies?

A: The user should select “N/A” from the dropdown menu in the required field if no specific person is associated with the trip.

Q: How can I temporarily assign a different approver and reviewer to an entire approval group while the current approver is on leave?

A: Yes, you can assign a different approver and reviewer to the approval group by following these steps:

1. Click the dropdown next to **Assign Manager**.
2. Select the appropriate name from the list.
3. Leave the role as **Manager**.
4. Click **Assign**.
5. Repeat the steps for the **Reviewer** role.

When the original approver returns, you can reassign them to the group by repeating the same steps.

Q: Where should users go to perform the second review step, especially if the same person handles both approvals and reviews?

A: Users who need to perform reviews should go to **Approvals > Review Trips**. Trips can only be reviewed after they have been approved, so even if it's the same person handling both tasks, they must complete both the approval and review steps separately.

Q: If a user's home office location is updated, will the change apply to past mileage entries or only to future ones?
A: The updated home office location will only apply to mileage recorded moving forward. Previously booked trips will retain the original location. To reflect the new information on past trips, you'll need to reject, repost, and edit each trip before re-approving it.

Q: Do users receive a notification when a trip is rejected?
A: Yes, users receive an email notification when a trip is rejected. This behavior is controlled by a setting located under **Control Panel > Company Settings**.

Q: Is rejecting a trip the best way to undo an accidental approval?
A: Yes. The only way to undo an approval is to reject the trip. Once rejected, it can be reposted to return it to the "Awaiting Approval" status.

Q: Who can reject and repost trips that have already been approved?
A: Only **Company Admins** and **Division Admins** have access to the **Trips Awaiting Payment** screen, where trips can be rejected and reposted. Managers at the Supervisor level do not have this permission.

Q: How can we handle trip approvals when a supervisor is out on short-term leave?
A: Assign a **Backup Manager** to the approval group as a **Secondary Manager**. The backup can access pending submissions by setting their Dashboard view to **Secondary Groups** or **All Groups**.

Q: Are batches created based on the payment process?
A: Yes. Batches are formed during the **Close Period** process. The selected trips, which

must already be approved, are marked as paid and moved to history once the period is closed.

Q: Can batches be changed after closing the period?
A: No. Once the period is closed and trips are included in a batch, they are moved to history and cannot be changed or reselected.

Q: Are only approved trips included in a batch?
A: Yes. Trips must be approved before they appear in the **Close Period** screen and can be selected for payment processing.

Q: Can a user manage their staff’s address books without full admin rights, and can admin rights be granted temporarily for this purpose?

A: Only users with Company Admin (Co-Admin) rights can add, edit, or transfer addresses in staff address books. You can grant admin rights temporarily to allow setup, but this access cannot be restricted to just specific staff and should be downgraded once the work is complete.

Q: How do the "OvrMiles" (Override Miles) and "Miles" (Calculated Miles) fields work, and how can mileage adjustments be made if needed?

A:

- The "Miles" field shows the automatically calculated mileage from MapQuest for the route, minus any home-to-office mileage deductions. This represents the default reimbursable miles.
- The "OvrMiles" field shows any manually entered mileage override submitted by the user.
- During approval, a manager can choose to approve either the calculated miles or the override miles. The approved mileage amount is what gets reimbursed.

If you need to adjust mileage:

- If the trip is not yet approved, go to Approvals → Edit Trips and adjust the override mileage directly.

- If the trip has already been approved, reject the trip in the Trips Awaiting Payment screen, repost it from Rejected Trips, then edit the override mileage before approving it again.

Manual deduction on the final report is also an option if preferred.

Q: Do users get notified when their trips are rejected, and is rejecting the best way to undo accidental approvals?

A: Yes, users receive rejection notifications when their trips are rejected. The only way to undo an approval is by rejecting the trip.

Q: How can approval responsibilities be managed if a supervisor is out on short-term leave?

A: You can assign another manager to the approval group as either a Manager or Secondary Manager. If assigned as a Secondary Manager, they must change the View filter to "All Groups" or "Secondary Groups" to see submissions from the other group.

Q: How do batches work in the system, and do all trips need to be approved to create a payment batch?

A: Batches are created during the Close Period process and can be selected when generating payment reports. Only trips that have been approved and selected in the Close Period screen will be included in the batch. Additional details are available in the Documentation Library.

Q: Can the “Mileage Manual Override” setting be removed without losing the “Shorter from Home or On Call” override option?

A: Yes. The “Mileage Manual Override” and “Override Home Commute” (which enables the “Shorter from Home or On Call” option) are two separate settings. You can disable the Mileage Manual Override without affecting the Override Home Commute, so the “Shorter from Home or On Call” option will remain available.

Q: Can the Company Mileage system routes be changed if the suggested MapQuest route is unsafe or inaccurate?

A: No, the routes provided by MapQuest are based on preferences for shortest time or distance and cannot be directly changed in the system. However, individuals may take any route they prefer. If they choose a longer or different route than the suggested one, they have the option to manually override the trip mileage to reflect the actual route taken.

Q: How can a user automate receiving a weekly report or notification showing the amount of mileage submitted, and where can they manage or enable such notifications?

A: While there isn't a built-in automatic weekly mileage report email, users can receive notifications for payment receipts, rejection notices, and manager approvals. Users can view mileage reports on web and mobile apps for custom date ranges. To automate notifications (such as a weekly mileage summary), users should go to the "Manage Schedules" section and create or manage notifications there. Instructions and options are accessible by clicking the question mark icon in the upper right of the interface. Some notification types may need to be enabled or added via feature requests, and currently, notifications for new users are visible, but other notifications can be found and managed in the same "Manage Schedules" area.

Q: If a mileage claim is entered in January for a trip that occurred in December, which IRS mileage rate does the system apply?

A: The system uses the Trip Date to determine the applicable rate. Therefore, if the Trip Date is in December, it will apply December's IRS rate—even if the claim is entered in January after the rate update.

Q: Why is a trip that a group manager approved not moving to the "Awaiting Payment" status, and what needs to happen for it to progress?

A: Although the group manager approved the trip, they must also go into "Review Trips" and mark the trip as reviewed. Once marked reviewed, the trip will move from "Awaiting Review" to "Awaiting Payment."

Q: A user is experiencing timeout and login issues with the mobile app after upgrading to iOS 18. Are there any known compatibility problems, and how can these issues be resolved?

A: There are no known issues or conflicts between the app and iOS 18. Troubleshooting steps include verifying the iPhone model, ensuring the app is updated to the latest version, and reinstalling the app. In one case, clearing the phone's cache resolved the login problem. Users experiencing issues are advised to try these steps first.

Q: What should a user do if the mobile app allows starting a trip but fails to properly end it, causing the timer to continue running in a loop?

A: If the app doesn't end the trip correctly and the timer stays active, the user can tap the trash can icon on the timer screen to delete the in-progress trip. They should then manually enter the trip using "New Trip" and try starting a new trip using "Check-In Log."

Q: Why can't certain users be removed from the managerial list, even after being terminated and having no pending approvals or payments visible?

A: Users cannot be fully removed from the system if they have pending trips in the "Trips Awaiting Approval" queue. To resolve this, those trips must be manually rejected and then deleted. Once all pending and future-dated trips are cleared, the users can be successfully removed from the managerial list.

Q: Why is the SureMobile app sometimes showing incorrect check-in locations or cities for users, and how can it be resolved?

A:
The SureMobile app may display incorrect check-in addresses due to several factors:

1. **Departmental Restrictions:**
   In the CompanyMileage system, address availability is limited by department. If an address (e.g., Essentia on 3rd) is not assigned to a user's department, it won't show as a valid check-in location. Adjusting address permissions to include the relevant department resolved this issue for at least one user.
2. **Incorrect Address Entries:**
   There may be inconsistencies between the city listed in the address book (e.g.,

Baxter) and what services like Google Maps show (e.g., Brainerd), despite referring to the same physical location. These inconsistencies can cause confusion or affect location matching in the app.

3. **GPS/Location Issues on Devices:**
   Some incorrect check-ins (e.g., being placed on Grouse St. instead of the actual office) were traced back to possible GPS or device location settings. Users should:
   - Ensure *Precise Location* is enabled (for both Android and iOS).
   - Calibrate GPS using Google Maps guidance (Google Maps Help).

Q: How can users ensure they are reimbursed correctly when the policy requires trips to start and end at the office, but the CompanyMileage system limits office selection based on GPS and "Shortest Distance" settings?

A:
To comply with a policy requiring trips to begin and end at the office, users should not rely on Check-In or Check-In Log at the end of the day unless physically near the office (within 0.5 miles), due to GPS restrictions. Instead, they should use the **Quick Capture** method throughout the day, selecting each location as they arrive. At day's end, they can go to *Trips > Quick Capture Locations Pending*, use **Add to Route** to manually include the office as the final stop, select all locations, and submit the trip. This bypasses the GPS requirement. Alternatively, if GPS tracking isn't required, users can manually enter all trips using the **New Trip** screen.

If a user does not see the "Shortest Miles" checkbox or the home address icon, they must first add a **home address** to their profile. The checkbox allows full reimbursement when the route taken is shorter than the standard home-to-office commute. Without it checked, the system deducts that commute distance from reimbursable mileage.

Admins needing to enable or check commute deduction override settings may refer to internal admin settings or contact CompanyMileage support for specific setup assistance.

Q: Can CompanyMileage be set to calculate mileage based on the fastest (shortest time) route instead of the shortest distance?

A:
Yes, you can change the route calculation method to reflect the **shortest time** by enabling the setting **"Shortest Time – All Users"** found in the **SureMileage Setup** tab. This change

will apply only to new trips entered after the update; previously submitted trips will remain unaffected.

Q: Why are commuter miles not being deducted for some users when entering their home address manually, and how can this be corrected?

A:
For commuter miles to be correctly deducted in CompanyMileage, the **home address in the user's profile** must **exactly match** the address saved in their **Personal Address Book**, including spelling (e.g., "Blvd" vs. "Boulevard") and ZIP code formatting (with or without 4-digit extension). Users must also use the **Home icon** when entering trips to ensure the system recognizes the trip as beginning or ending at the registered home location.

If addresses differ even slightly, or if the Home icon isn't used, the system may not detect the trip as involving the user's official home address—leading to inconsistencies in commuter mileage deductions. Address coordinate discrepancies from mapping services (MapQuest/Google) can also contribute, though CompanyMileage has added a report to help identify these instances. Ensuring consistency in address entry across the profile and address book is key to resolving the issue.

Q: Why do some pending expenses not appear in the "Approve Expenses > Detail by Employee" screen, and where can they be found?

A:
Pending expenses that an employee has saved but **not yet submitted for approval** will not appear in the **Approve Expenses > Detail by Employee** screen. These expenses remain in the employee's account as **pending submission**. To see and approve them, the employee must first **submit the expenses for approval**. Until then, the expenses will only be visible to the employee and not to approvers.

Q: How do I add a budget code in CompanyMileage?

A:
To add a budget code, go to **Accounting Setup** > **Budget Code**, then enter the following details:

- Budget Code Name

- Budget Code Code
- Budget Code Description
- Budget Code Import Value

After filling in these fields, click **Add Budget Code** to save it.

Q: Why is the daily commute not being deducted for a staff member, and how can this be resolved?

A: The daily commute wasn't deducted because the staff member entered a different home address in their personal address book than what's listed in their profile. The system only recognizes the home address from the profile when using the Home Icon Shortcut. To fix this, update the profile with the correct home address and have the staff member use the Home Icon Shortcut for bookings. Additionally, there's a report available under "Reports > Other Reports" that can help identify such discrepancies.

Q: Why can't a division admin see her employees in the "approvals" section, and how can this be fixed?

A: The division admin needs to be assigned as a Manager of her approval group. Once Mindy is assigned as a Manager for the group that includes her employees, she will be able to see and approve their submissions in the approvals section.

Q: Can any user add or edit entries in the Company Address Book, and is this setting adjustable?

A: By default, users cannot add or edit the Company Address Book. However, this setting can be changed for all users by navigating to System Users > User Access Defaults > Default Access Setting for New Users, then selecting "Yes" next to "Allow to add/edit to Company Address book." This must be done for each user level (including Supervisor and Division Admin). After saving, existing users' settings can be updated by clicking "Reset All Current Users Settings" and updating the setting for each level.

Q: How should override mileage be entered and approved in Company Mileage when using a different route than the default shortest-time calculation, and why might override miles not be calculating after manager approval?

A: Company Mileage calculates mileage based on the shortest time route from MapQuest by default, which may not match actual routes taken (e.g., highways around a city). If a different route is used, users should enter the *total* trip mileage they believe is accurate in the Mileage Manual Override box—not just the extra miles—and include an explanation in the Memo field for their approving manager. Override miles will only calculate if entered correctly this way. If someone is requesting commute mileage (like from home) on trips that start at home, this should be clarified as it's often not reimbursable. Approval depends on the manager reviewing the explanation and mileage entered.

Q: How do divisions and departments work in CompanyMileage, and how can job cost codes be assigned and limited for users based on these groupings?

A: In CompanyMileage, divisions represent broad groups, often physical office locations, while departments are subgroups within divisions representing different teams. Job cost codes can be assigned to one or more divisions or departments depending on the system's "Assign Job Cost Codes To" setting. When set to divisions, users will only see job cost codes assigned to their division on trip entry screens, helping limit the codes each user can access and reducing errors. Divisions and departments also impact approval workflows, address book access, and user permissions. Divisions are set up under Company Settings > Manage Divisions, and users can be assigned to divisions and departments accordingly. Mass user updates to divisions can be done through the System Users feature. This structure allows better control over which codes and addresses users see, streamlining accurate data entry and approvals.

Q: Why does CompanyMileage show different mileage amounts for the same trip entered on different days, even when using saved addresses and the same trip details?

A: CompanyMileage calculates mileage using either the shortest distance or shortest time route, depending on your organization's setting. Since your organization chose the shortest time route, the mileage can vary day to day or even by time of day because MapQuest's algorithm estimates travel times based on average traffic conditions. This means the shortest time route between two points may change, causing mileage differences for the same trip. Additionally, mileage deductions like the commute to work are recalculated at the time of trip entry, which can also vary. The miles-to-work value shown in the user profile is only an estimate and may differ from the actual deduction applied during trip entry.

Q: Can we get a list of Company Admins who have run reports in CompanyMileage over the last few months?

A: No, CompanyMileage does not track or keep records of who generates reports. The audit history only records login information related to trip and expense entry, approvals, reviews, and payments—not report generation.

Q: Why didn't an employee's approved trips and expenses dated after 8/3/2024 appear in the 8/6 export, even though they were approved on 8/5?

A: The trips and expenses in question were dated after the period end date of 8/3/2024. Because of this, they fell outside the closed period and were not included in the 8/6 export. They will instead be available for payment in the next payment batch. Approval timing alone does not override the impact of the trip or expense date in relation to the closed period.

Q: If I forget to check the "Email Receipt" box when closing a payment batch in CompanyMileage, how can I notify users that payment has been initiated and share payment details?

A: You can create a Company Message that appears on users' main screens to inform them payment has been initiated. Include instructions to view details under **Reports > Payment Reports > Payment History**. To set this up, go to **Control Panel > Company Settings > Manage Company Messages**, click **Add**, and customize the message. You can also choose which users will see it and optionally send it as an email notification.

Q: What should a user do if they cannot log in to SureMileage due to a "username not found" error, even after entering the correct credentials and two-step authentication?

A: This issue is typically caused by the user having an "inactive" status in the employee file received from the employer (e.g., due to being on leave such as FMLA). To resolve it:

1. Confirm with HR or the user's manager that their employment status in Workday (or the relevant HR system) is set to "Active".

2. Once corrected in the HR system, either:
   - Wait for the next automated sync to update the status in SureMileage, or
   - Manually activate the user in the CompanyMileage system by:
     - Going to Control Panel > System Users
     - Changing "User Status" to "All"
     - Searching for the username (e.g., pw6298)
     - Clicking "Edit" and setting "Status" to "Active"
     - Clicking "Save"

After this, the user should be able to log in via both the SureMileage app and browser.

Q: What should I do if an employee number I'm trying to assign to a new hire is already in use by another profile?

A: If an employee number (e.g., 041054) is already assigned to another user—such as a new hire who has not yet been added to your HR system (like UKG)—you can temporarily resolve the conflict by:

1. Searching for the employee number to identify the profile it's currently assigned to.
2. If it's assigned to someone not yet in the HR system (e.g., Tracey Folarin), edit that profile.
3. In the **Employee #** field, enter a placeholder like the employee's last name or "Pending #" and save the changes.
4. You can now reassign the correct employee number (041054) to the intended user (e.g., Jeroline Bryant).

This allows proper tracking while awaiting official HR system updates.

Q: How can I enter a staff member whose home address is very close or identical to the office address in CompanyMileage?

A: If a staff member lives near or on the same street as their worksite, and you receive an error requiring a unique address, you can override this restriction by:

1. Navigating to **System Users > User Fields Settings**.
2. Setting **“Allow Home & Work Address to be identical”** to **Yes** from the dropdown menu.
3. Clicking **Save** at the bottom of the page.
4. Logging out and back in to apply the change.

You can revert the setting to **No** after the staff member is set up if needed.

Q: How can I edit a trip that was already approved but needs a correction, such as entering overrides?

A: To edit approved trips in CompanyMileage, follow these steps:

1. Go to **Trips Awaiting Payment** and **reject** the relevant trips.
2. Navigate to **Rejected Trips** and **repost** the trips.
3. Once reposted, the trips will return to the **Approvals** section, where they can now be edited to include the necessary changes (e.g., overrides).

This workflow allows you to correct trip details after approval but before payment is finalized.

Q: Why is a user only seeing the Check-In Log option instead of the standard Check-In feature, and how can it be fixed?

A: This issue is caused by the user's **Trip Entry Method** being set to use the Check-In Log. To restore the standard Check-In option:

1. Have the user go to **Settings > User Preferences**.
2. Change the **Trip Entry Method** to the desired option (e.g., "Standard Check-In").
3. Ensure that all pending trips on the **Check-In Log** page are submitted **before** making the change.

Q: How can I correct a trip that was entered with the wrong date and ensure it doesn't get included in the current payroll batch in CompanyMileage?

A: If a user mistakenly enters a trip with the wrong date (e.g., entering 7/26 instead of 6/26), and the trip is still in **Awaiting Approval** status (i.e., not yet paid or approved), follow these steps:

1. **Update the Approval Dashboard**:
    a. Change the **Activity End Date** filter (e.g., to 2024-07-31) and click **Refresh** to locate the trip.
    b. You can also use **Detail by Date** and click the column headers to sort trips.
2. **Reject the Trip**:
    a. Locate the incorrect trip in **Trips Awaiting Approval**.
    b. Reject the trip to send it back to the user.
3. **Have the User Re-enter the Correct Date**:
    a. The user can now modify the trip to reflect the correct date (e.g., 6/26) and resubmit it for approval.

Note: The system only includes trips with activity dates falling **on or before the payroll period end date** during payment processing. However, ensure the correct dates are used to avoid confusion in reports.

Q: Why does mileage reimbursement in CompanyMileage vary for the same home-to-work trip entered on different days?

A: Variations in mileage reimbursement are expected when your organization uses the **"Shortest Time"** route setting in SureMileage. Here's how it works:

- **Route Calculation**: The system calculates mileage using MapQuest's algorithm, which selects routes based on the **shortest estimated travel time**, not shortest distance. This estimation factors in historical traffic patterns for the specific day and time.
- **Daily Variability**: Because traffic patterns change, the shortest-time route (and its distance) may differ day to day or even by time of day. For example, one day the shortest-time route may be 19 miles, and the next day it may be 21 miles.
- **Commute Deduction Logic**: When calculating mileage, the system deducts the mileage between the user's home and their work address using the same shortest-time logic. If the commute route has more miles than the client visit route, reimbursement is lower—and vice versa.

- **Profile Display vs. Actual Deduction**: The miles-to-work value in the user's profile is a static estimate, but the actual deduction is calculated live when the trip is submitted.

This behavior is standard system design when "Shortest Time" is selected as the routing method. If consistent mileage values are desired, consider switching to the "Shortest Distance" setting in your organization's SureMileage setup.

Q: If I terminate a user with approved mileage awaiting payment in CompanyMileage, will that data be lost—and can it still be paid?

A: No, the approved mileage is **not lost** when a user is terminated. Once the user is reactivated, the trips become available again in **Close Period** for payment processing.

You have two options for batching the payment:

- **Include it in the regular batch** with other users, or
- **Create a separate batch** if you want to isolate the payment for tracking or audit purposes.

This allows flexibility in handling payments for terminated users without losing historical data.

Q: How can I change the status of client records to "Terminated" during a batch import in CompanyMileage?

A: To change a client's **Status** to "Terminated" during import, you have two options:

1. **Automatic Method**:
    a. If a **Term Date** is provided in the import file, the system will automatically update the status to "Terminated" during the **overnight processing cycle**.
2. **Immediate Method**:
    a. To make the status change happen immediately, include a **Status column** in your import file and map it to "T" (for Terminated).
    b. If you don't see the "Status" field available to map, ensure you are using the correct **template type** (not the User import) and that "Status" is included as a mappable field under "Map Edit".

This allows bulk updates to client or address records without manually editing each profile.

Q: Is there a cost to set up custom fields (e.g., for uploading driver's licenses and insurance information) in CompanyMileage?

A: No, there is **no cost** associated with setting up custom fields or using features like file uploads and custom reports in CompanyMileage. You can configure custom fields to accept file uploads, restrict access to admins, or allow users to upload documents themselves. These uploaded files are accessible via a link in the user's profile and are also trackable through the Employee Excel report.

Q: How can I add a staff member as a Co-Admin in CompanyMileage?

A: You can add a new Co-Admin directly through the **System Users** section. To do this:

1. Go to **System Users** in the admin panel.
2. Edit the user's profile whom you want to make a Co-Admin.
3. At the bottom of the page, under **User Administrative Level**, make sure to check **all required permission boxes** for Co-Admin access.
4. Save the changes.

This will grant the user the administrative privileges needed to function as a Co-Admin. No need to contact support to complete this step.

Q: Why didn't my "Ready to Post" addresses post from the Batch Detail screen in CompanyMileage, and how can I ensure they do?

A: If addresses are in **Ready to Post** status but aren't posting from the **Batch Detail** screen, it's likely because the action was applied without properly specifying which records to post.

To resolve this:

1. Go to the **Selected Batch** dropdown and choose **"Ready to Post"**.
2. Then, click the **bubble** next to the batch you want to post.
3. Click **Post** to complete the action.

This ensures that only the correctly filtered and selected records are posted. Avoid posting directly from the bottom screen unless all criteria are clearly set, as unfiltered actions may ignore unspecific records.

Q: Why did the system stop deducting the home-to-office commute from mileage after updating a work address in CompanyMileage, and how can it be fixed?

A: If the system stops deducting the home-to-work commute after a work address update, it's likely because the **updated address was not properly validated**—often due to an error such as an incorrect zip code.

To resolve this:

1. Recheck the updated work address in **Company Settings > Manage Divisions**.
2. Ensure the **zip code and full address are accurate**.
3. Once corrected and the address validates, the **office icon will reappear** on user accounts.
4. The system will resume deducting the commute distance from the first and last visits as expected.

This validation step is required for the address to be recognized in mileage calculations. Once validated, commute deductions and icons will function normally again.

Q: Why aren't an employee's approved trips showing up in the Close Period screen for payment in CompanyMileage?

A: Even if trips are in **Approved** status, they will not appear in the **Close Period** screen unless they are also marked as **Reviewed**. In the case of one employee:

- Most trips were in **Approved** status, with a few still in **Posted** status (i.e., not yet approved).
- **None** were marked as **Reviewed**, which is a required step before payment.
- You can find his trips in the **Approvals – Awaiting Review** screen.

To proceed, each trip must be marked as **Reviewed** before it will appear in the **Close Period** screen for processing and payment.

Q: Why does CompanyMileage show different mileage for a round trip between the same two points (e.g., Point A to Point B vs. Point B to Point A)?

A: It's common for each leg of a round trip to show **slightly different mileage**, even if the route appears the same. This happens because:

- The routing system calculates mileage to the **tenth of a mile**, and even small differences—like **left vs. right turns**, **highway on-ramps vs. off-ramps**, or **one-way streets**—can create variation.
- The mapping engine uses **direction-specific pathing**, meaning it calculates each leg (A→B and B→A) independently, based on road layout, traffic flow, and turn restrictions.

These factors can result in minor discrepancies, especially on longer trips where such differences can accumulate. This behavior is **normal and expected** within the mapping system used by CompanyMileage

Q: How can we remove specific trips from a payment batch in CompanyMileage if they were mistakenly approved and paid?

A: To remove specific trips from a processed batch, you must reverse the **entire payment batch**—batch reversal cannot be done for individual employees.

Here's the step-by-step process:

1. **Request a Reversal**: Contact CompanyMileage Support with the **Batch Number** and **Payment Date** (found in the Batch History Report under Payment Reports) and confirm you want the items returned to **Awaiting Payment** status.
2. **Trip Status Update**: Once reversed, all trips in that batch will revert from **Paid** to **Awaiting Payment**.
3. **Reject Specific Trips**:
    a. Go to **Approvals > Trips Awaiting Payment**.
    b. Select the employee whose trips should not be approved.
    c. Reject the incorrect trips.
4. **Modify or Delete**:

    a. Rejected trips can be **modified, reposted, re-approved**, or **deleted**, depending on your needs.
5. **Reprocess the Batch**:
    a. After cleanup, go to **Close Period** to process a new batch.
    b. Generate an updated report reflecting the corrected data.

This ensures accurate payment history and avoids paying for trips that should not have been approved.

Q: Why can't a user edit or delete trips in the Trips Awaiting Approval screen in CompanyMileage?

A: In the **Trips Awaiting Approval** screen, users have **limited editing capabilities**:

- They **can** modify:
    - **Job Costing Code**
    - **Mileage Override**
    - **Memo**
- They **cannot** modify:
    - **Addresses**
    - **Mileage field** (directly)
    - **Trip Date**, unless the trip was entered using **New Trip** or **Input Grid**
- **Once a trip is marked as Approved**, it **can no longer be modified**.

If a user needs to correct a trip:

1. They must **delete** the incorrect trip (if still editable).
2. Then **re-enter** it with the correct information.

There have been **no changes to user permissions** for editing or deleting trips since 2023, so the current behavior is consistent with system design.

Q: Can CompanyMileage store user bank information and facilitate direct reimbursement through a payment processor or bank integration?

A: CompanyMileage does **not currently partner with a bank or payment processor** for direct reimbursements. However, the platform **can support storing bank-related data** securely by adding **custom fields** to user profiles. These fields:

- Are visible only to the individual user and Company Admins.
- Can include details such as bank account number, routing number, or payment preference (e.g., check or ACH).
- Can be included in a **Custom Excel Detail Report**, which can be downloaded and shared with your bank or used to initiate payments.

If your bank accepts a file for processing ACH payments, CompanyMileage can work with you to create a **custom export file** matching your bank's required format—assuming all necessary data is available.

This setup provides a manual, secure way to bridge mileage approval and reimbursement, while maintaining administrative control over sensitive payment data.

Q: If Quick Capture in CompanyMileage records the wrong address, can it be edited later—and how should users handle it?

A: Once a trip is submitted using Quick Capture, the **address cannot be edited**. Here's how to manage it correctly:

When using Quick Capture:

1. **GPS is initially captured**—not the full address.
2. Before submitting, go to **Trips > Quick Capture Locations Pending**.
3. Tap **Select All** or choose specific entries.
4. Tap **Create Trip**—this is when the address becomes selectable.
5. On the trip creation screen, review the **Suggested Address**.
    a. If it's incorrect, tap the **arrow next to Address Type**.
    b. Choose from:
        i. **Nearby Address** (from Address Book)
        ii. **Home/Work** (if relevant)
        iii. **Manually Enter Address**

If the trip has already been submitted:

- The address **cannot be changed**.
- The user should **delete the incorrect trip** and **re-enter it** using the **New Trip** screen with the correct address.

Tip:

There is no system setting needed to enable address editing; the key is selecting or editing **before submission** during the Create Trip step.

Q: If my mileage expense report is in "Ready to Pay" status, do I need to take any further action to receive payment?

A: No further action is required, **payments are processed directly by your compoany** once the report reaches the "Ready to Pay" status in CompanyMileage. You do not need to submit or approve anything additional.

Q: Is there a report in CompanyMileage that shows which users are entering trips manually instead of using the Check-In Log?

A: Yes, you can identify how trips are entered by using the **Custom Excel Detail Report** found under **Mileage Reports**. Here's how:

1. Navigate to **Reports > Mileage Reports > Custom Excel Detail Report**.
2. In the report setup, include **Trip Entry Method** as a filter or column.
3. This will allow you to filter or sort results based on how trips were entered—such as via **Check-In Log**, **Manual Entry**, or other available methods.

While no standalone report exists solely for this purpose, the **Trip Entry Method** field in the Custom Excel Detail Report provides the detail needed to differentiate trip submission methods.

Q: Why does mileage vary for the same trip on different days, and are we overpaying or underpaying when this happens in CompanyMileage?

A: Mileage may vary for the same route due to your organization's routing setting being configured for **"Shortest Time"** instead of **"Shortest Distance."** Here's how it works:

- **Shortest Time Routing**: CompanyMileage uses MapQuest to estimate the route with the lowest average travel time, factoring in historical traffic patterns based on the **day and time** of entry.

- As a result, the **distance returned can differ** day to day—even for the exact same locations. For example, a trip might be 3.8 miles one day and 4.2 miles the next, depending on traffic patterns and route selection.
- **Deduction Calculation**: For trips starting from home, the system also calculates the commute to the user's primary work location using shortest time logic. This deduction may **change daily**, affecting the total reimbursable mileage.

The system is not overpaying or underpaying—it's working as designed. All calculations are based on dynamic route data to reflect **realistic driving conditions**, not fixed distances. If consistent mileage is preferred, your organization could consider switching to **"Shortest Distance"** routing in the SureMileage Setup.

Q: How can we handle expense entries in CompanyMileage for an inactive employee when entries are not visible or postable?

A: When entering expenses for an inactive employee, like in the case of Elaine Mollindo, the following applies:

1. **Unposted Expenses Not Visible**: By default, expenses must be **posted by the employee** to be visible in the system. If the employee is inactive, these entries cannot be posted through their login.
2. **Resolution Options**:
    a. **CompanyMileage Support** can remove unposted or duplicate entries on your behalf.
    b. You can also request to have the **expense submission setting changed** to automatically post expenses to **Awaiting Approval**, allowing entries to bypass the need for manual posting.
3. **Approval Flow**: Changing the submission setting to auto-post will **not alter the existing approval workflow**. Expenses will still flow through the defined approval chain (e.g., supervisor to AP approval).

Q: Why does a random letter (like "e", "y", or "s") sometimes appear in the Memo or Note field when entering mileage in CompanyMileage?

A: This typically occurs due to **inadvertent keystrokes** as the user tabs or clicks through fields during entry. CompanyMileage has not had other reports of system-generated characters appearing in the Memo field.

If a user consistently sees stray letters:

- It's most likely that a **key is being unintentionally pressed** (e.g., during rapid tabbing or clicking).
- There are **no system shortcuts or background processes** that automatically enter letters into that field.

While not system-related, if the issue persists, consider reviewing the user's input method or device (e.g., stuck keys or touchscreen sensitivity).

Q: How do I add a new program or grant in CompanyMileage?

A: To add a new program or grant, go to **Accounting Setup > Program/Grant** within the CompanyMileage system. From there, you can enter and save the new program (e.g., "3038 MSU Kinship").

Q: How do I update an employee's home address in CompanyMileage so it correctly affects mileage calculations?

A: To ensure home address updates impact mileage deductions correctly:

1. Go to **System Users**.
2. Locate and **edit the employee's profile** by clicking "Edit" in the summary view.
3. Update the **home address** directly in their profile.

Note: Updating the address in the **user's personal address book** will not affect system-calculated trips. Additionally, **trips already entered before the change will not update automatically** — those must be **rejected, corrected, and re-entered manually**.

Q: How can I get a list of users and their locations in CompanyMileage?

A: You can generate this information by running the **Excel Employee Report**. To access it:

- Navigate to **Reports** > **Other Reports**
- Select **Excel Employee Report**

This will provide a downloadable list of users along with their associated location data.

Q: How can I show my supervisor the dates I submitted my mileage entries in CompanyMileage?

A: While there isn't a personal report that shows date and time stamps of your trip submissions, your **Manager** can run the **User Trip Action/Memo History** report. This report will display when each of your trips was **entered, approved,** and **paid**, providing the proof of submission your supervisor needs.

Q: Why did the commute deduction on a user's trip appear unusually high, and how can it be prevented in the future?

A: The system recalculates the commute deduction based on the **shortest time route** each time a trip is submitted. Because your organization is configured to use "shortest time" instead of "shortest distance," the mileage between a user's home and work address may vary based on traffic patterns—even for the same route.

In the case you described, the system likely selected a longer route (22.8 miles) as the shortest time due to current or historical traffic conditions at the time of submission.

To prevent this from happening again, you can override this fluctuation for specific users by:

1. Going to the user's profile under **System Users**
2. Finding the **Trip From/To Home Override** setting
3. Changing it from **No Override** to an override option
4. Entering the desired **Maximum Deduction** value (e.g., 13.5 miles)

This will cap deductions and prevent excessive variance due to traffic-based routing.

Q: How can I prevent discontinued project codes from being used in CompanyMileage?

A: If a project code is no longer in use and is not currently assigned to any addresses, you can **delete the code** from the system. Deleting a code will not remove or affect any historical trip data that used the code—those records will retain the code information.

This is more effective than simply marking a code as “Do Not Use,” which still allows it to be selected. Deleting ensures it cannot be used going forward.

Q: Can I customize how managers receive mileage approval notifications, especially if they are assigned to multiple approval groups?

A: Yes. While CompanyMileage currently sends one email per approval group, there are a few ways to manage or reduce notification volume:

1. **Assign Secondary Managers** – You can assign backup managers as secondary approvers to only receive notifications for the groups they directly manage.
2. **Adjust Notification Settings** – In Notification Setup, managers can opt out of specific notifications they don't need to receive.
3. **Use Reports Instead** – Instead of relying solely on emails, managers can run approval reports showing all trips awaiting action across all their assigned groups.
4. **Scheduled Reminders** – The “Manage Schedules” feature can be used to automate reminders for approvers based on your preferences.

Additionally, **daily notifications are only sent when trips are pending**—managers will not receive emails if no action is required.