

# How to Import Expenses

This document is to assist you in submitting expenses via import into HubNetic. Please follow the steps below and let us know if we can assist you further.

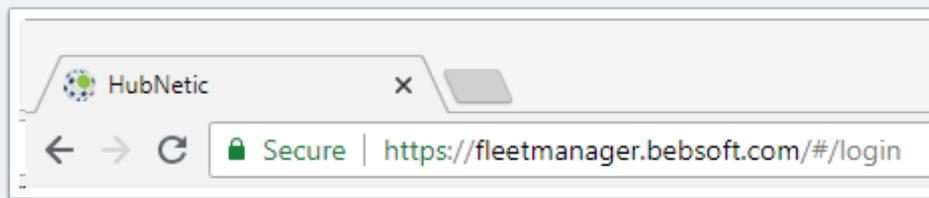
Thank you,

Your HubNetic Support Team

## Navigate to the HubNetic website

It is recommended that you use Google Chrome

<https://fleetmanager.bebsoft.com>

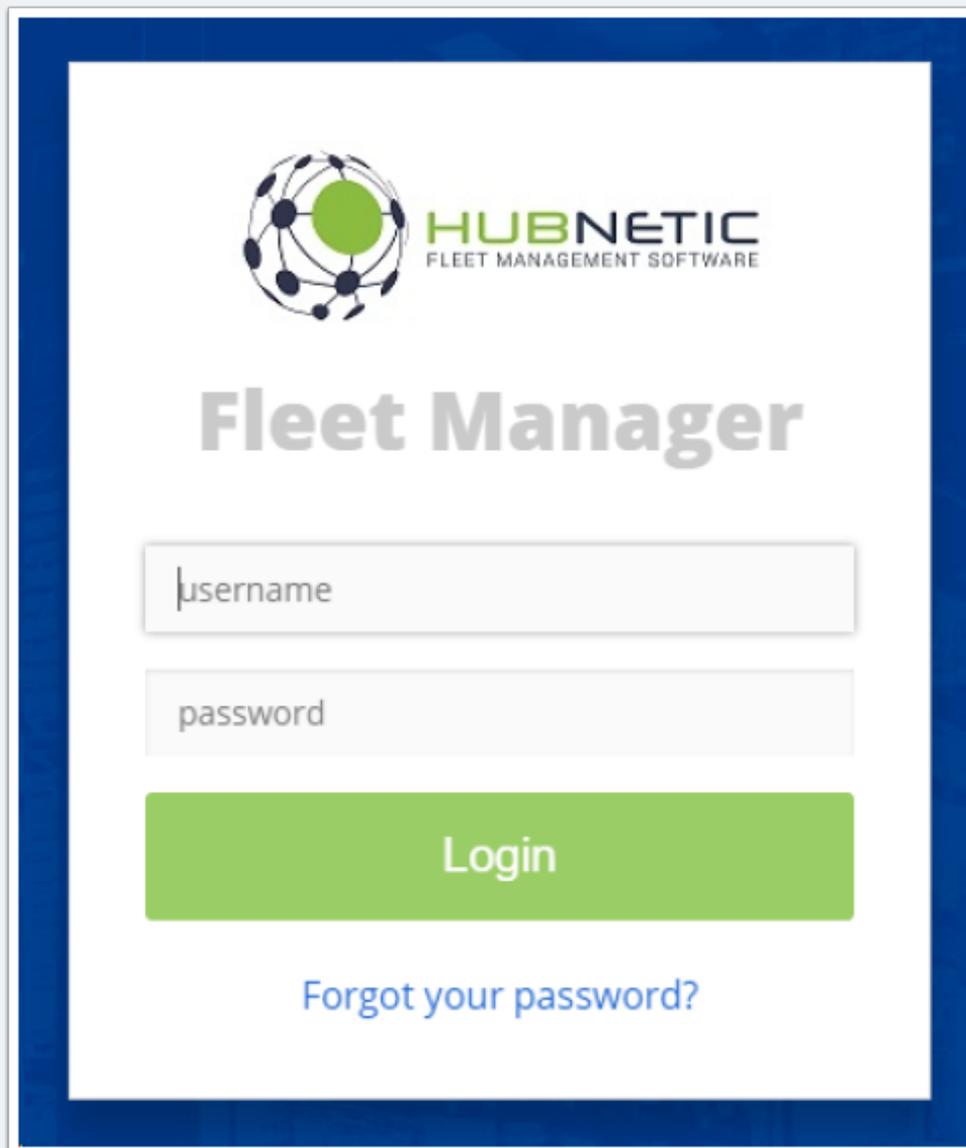


# How to Import Expenses

## Login

If you do not have a login, please contact us:

- 1-833-HubNetic (482-6384)
- support@hubnetic.com



 **HUBNETIC**  
FLEET MANAGEMENT SOFTWARE

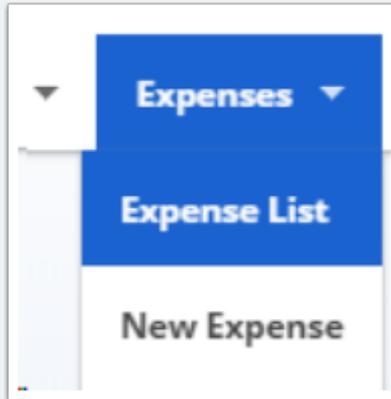
## Fleet Manager

  
  
[Login](#)  
[Forgot your password?](#)

# How to Import Expenses

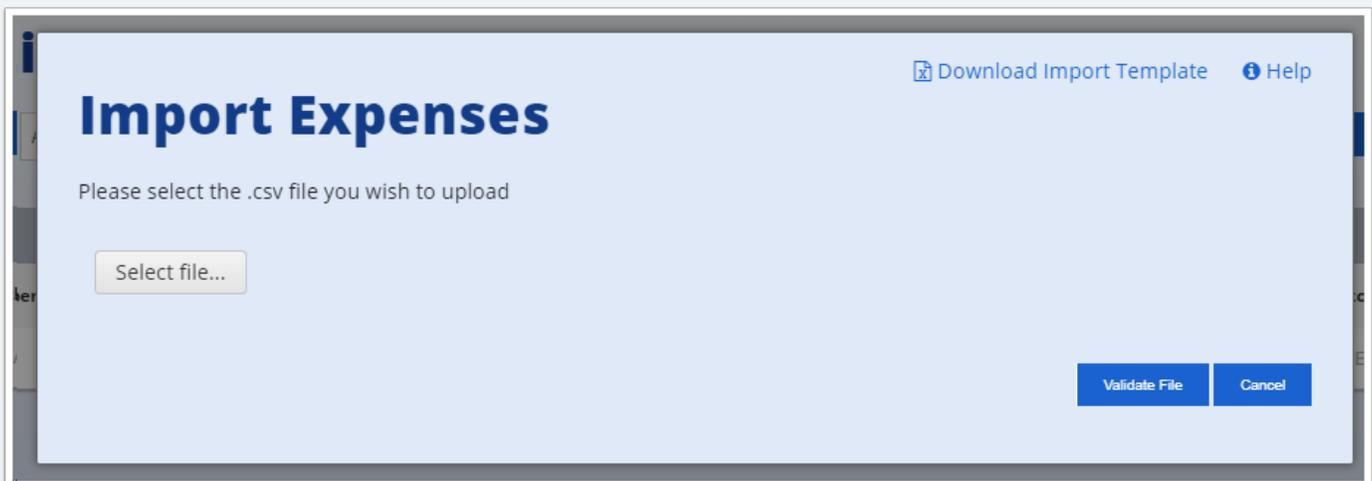
## Navigate to 'Expense List'

Once you login, hover of 'Expenses' and a sub-menu will appear. Once that sub-menu appears, select 'Expense List'



## Download Import Template

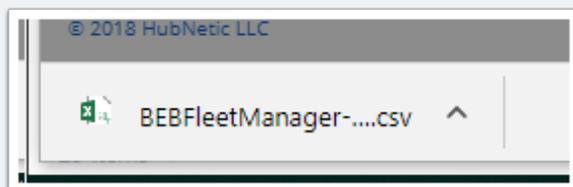
- Select 'Import Expenses'
- A popup will appear - select 'Download Import Template' in the top right hand corner



# How to Import Expenses

## Open the Downloaded CSV File

Downloads usually appear at the bottom of your screen, please select it to open



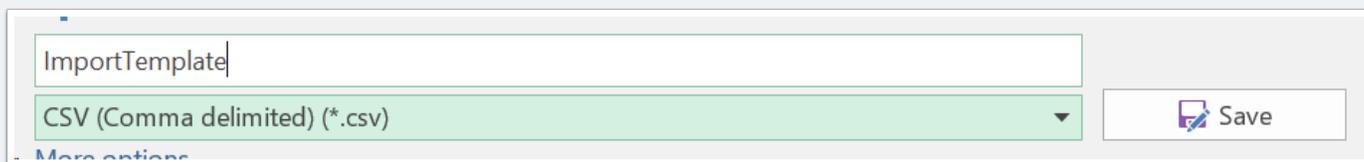
## Populate the Import Template

- All fields with an \* are required.
- Recommended - fill out all fields possible
- Spelling/Format must match HubNetic exactly.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	*Client Name*	*Client Location*	*Serial Number*	*Service Provider*	*Service Provider Location*	Invoice Number	Invoice Date	PO Number	WO Number	*Service Date*	*Meter Reading*	Service Request Number	*Service C
2													
3													
4													

## Save the Import Spreadsheet

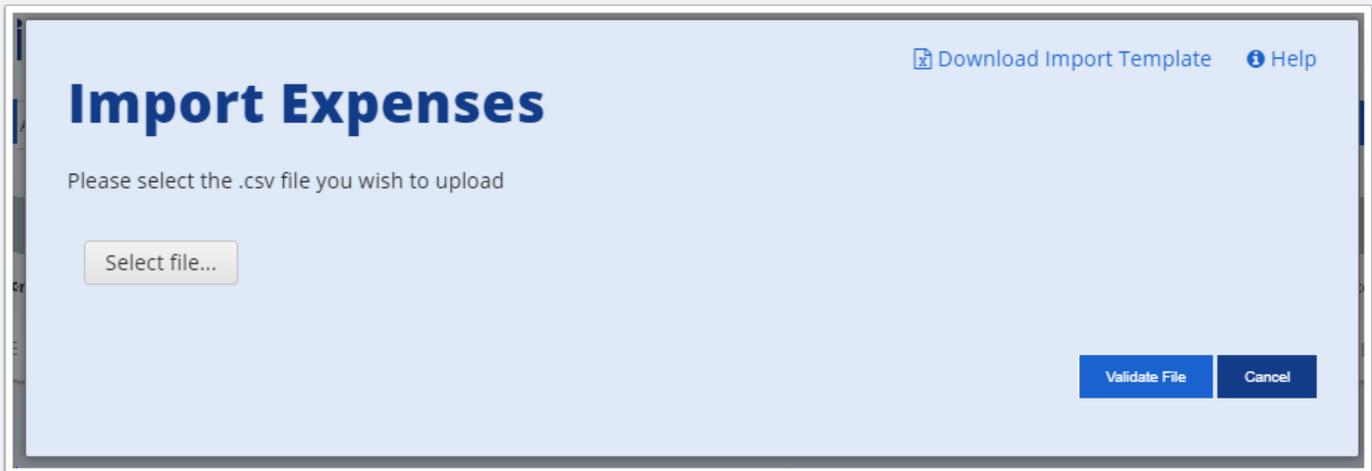
Save the import spreadsheet to your computer. **\*\*Import template must be saved in a .csv format.\*\***



# How to Import Expenses

## Import Expenses

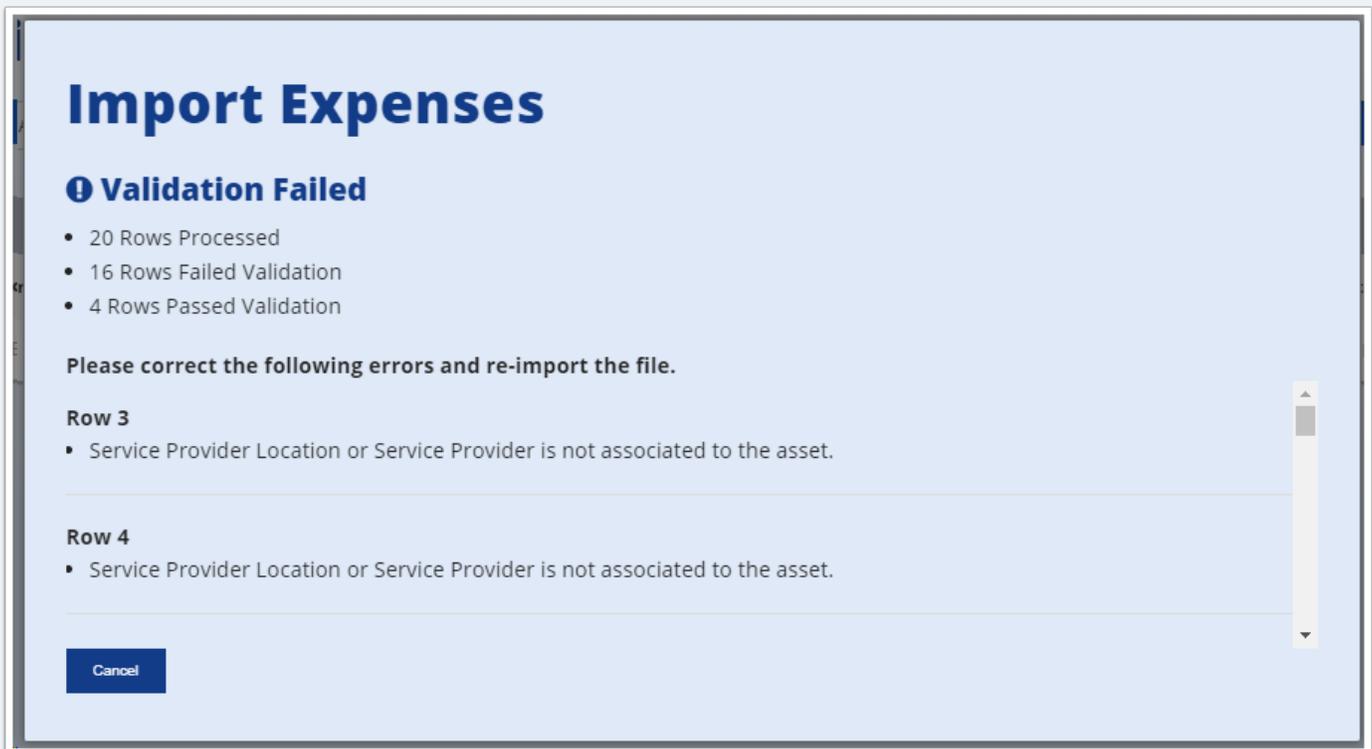
- On the 'Expense List' page, select 'Import Expenses' and the pop-up will appear
- Select 'Select File' and find your .csv document
- Once selected, press 'Validate File'



# How to Import Expenses

## Review Import for Errors

If you have any errors you will receive a list that corresponds with the row in your import worksheet. Review/Correct these errors as the whole file will not import until these are resolved.



The screenshot shows a dialog box titled "Import Expenses" with a blue header. Below the title, there is a section titled "Validation Failed" with a blue information icon. This section contains a bulleted list: "20 Rows Processed", "16 Rows Failed Validation", and "4 Rows Passed Validation". Below this list, a message states: "Please correct the following errors and re-import the file." The dialog then lists two rows with errors:

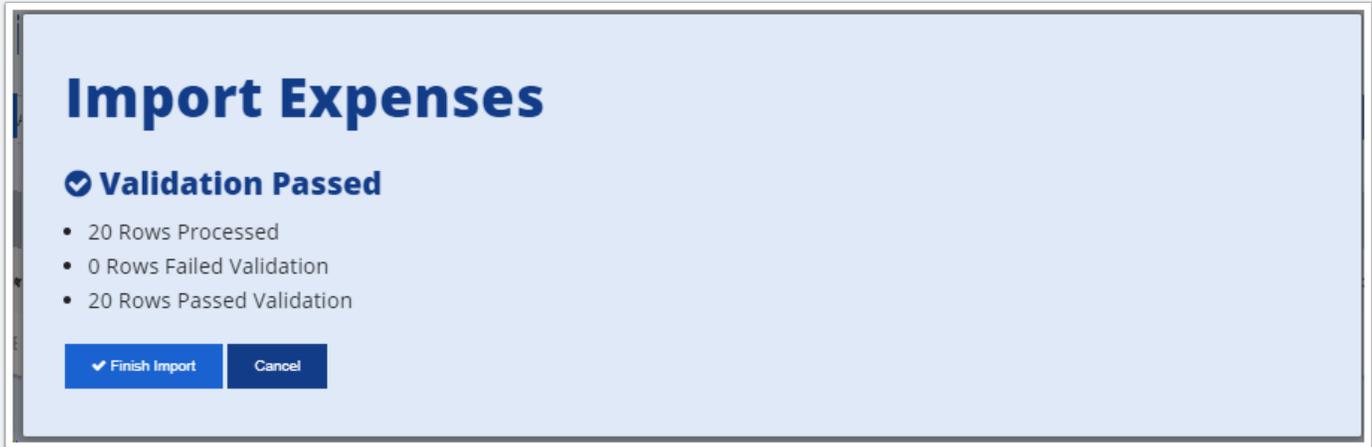
- Row 3**
  - Service Provider Location or Service Provider is not associated to the asset.
- Row 4**
  - Service Provider Location or Service Provider is not associated to the asset.

At the bottom left of the dialog, there is a blue button labeled "Cancel". A vertical scrollbar is visible on the right side of the dialog content area.

# How to Import Expenses

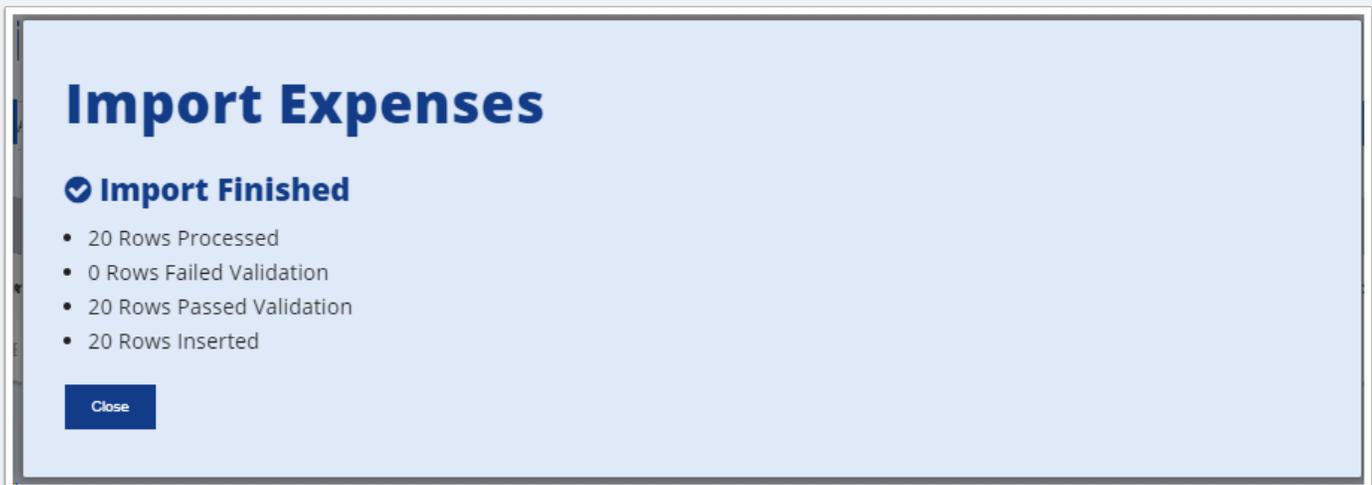
## Successful Validation

Once errors have been resolved, you will have a successful validation. Select 'Finish Import'



## Successful Import

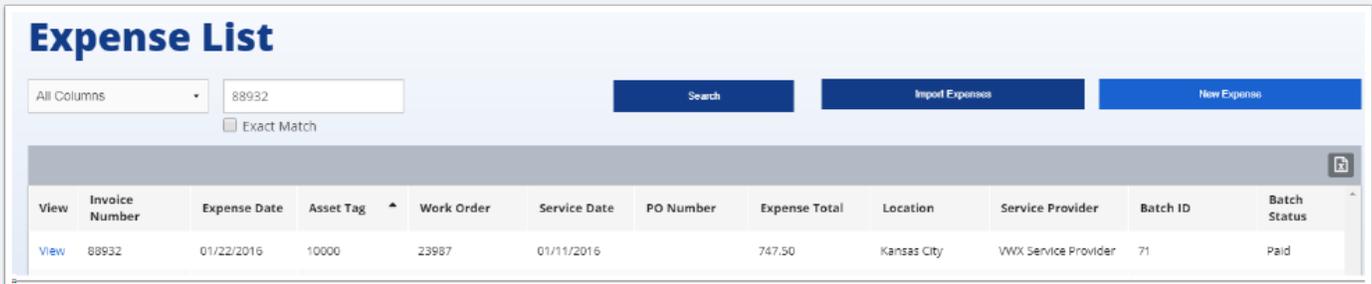
Once import is finished, you will receive a confirmation message.



# How to Import Expenses

## Verification of Expense/Payment Status

- Once you have saved your expense, it will take you to the 'Expense List' screen
  - this screen allows you to check to see if your invoices are entered into HubNetic OR see status of payment on invoices.



The screenshot shows the 'Expense List' interface. At the top, there is a search bar with '88932' entered and a search button. Below the search bar, there are buttons for 'Import Expenses' and 'New Expense'. A table below displays the expense details.

View	Invoice Number	Expense Date	Asset Tag	Work Order	Service Date	PO Number	Expense Total	Location	Service Provider	Batch ID	Batch Status
<a href="#">View</a>	88932	01/22/2016	10000	23987	01/11/2016		747.50	Kansas City	WWX Service Provider	71	Paid