

strategy

Live!

Totally Internet Based Software

Fuel Processing

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Edit State Tax Rates

The first thing to do before processing Fuel Tax is to setup your state tax rates. This is a simple process. Go to Fuel> Edits> Edit State Tax Rates. Once there fill in the proper tax rates for each necessary state. The rates can be obtained by going to <http://www.iftach.org>.

ST	Fuel Tax Rate	State Surcharge Rate	Loaded Mileage Rate	Empty Mileage Rate
AB	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
AK	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
AL	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
AR	<input type="text"/>	0.1900	<input type="text"/>	<input type="text"/>
AZ	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
BC	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
CA	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
CO	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
CT	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
DC	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
DE	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
FL	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
GA	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
IA	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
ID	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
IL	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
IN	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
KS	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
KY	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
LA	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
MA	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Fill out the fields according to the following definitions:

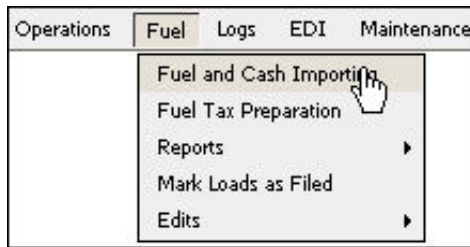
- Fuel Tax Rate:** Tax due for each gallon of fuel burned in the state
- State Surcharge Rate:** Surcharge per gallon of fuel burned in the state. Not required by all states
- Loaded Mileage Rate:** Some states may have additional taxes for loaded miles
- Empty Mileage Rate:** Some states may have additional taxes for empty miles

Fuel Purchases and Advances

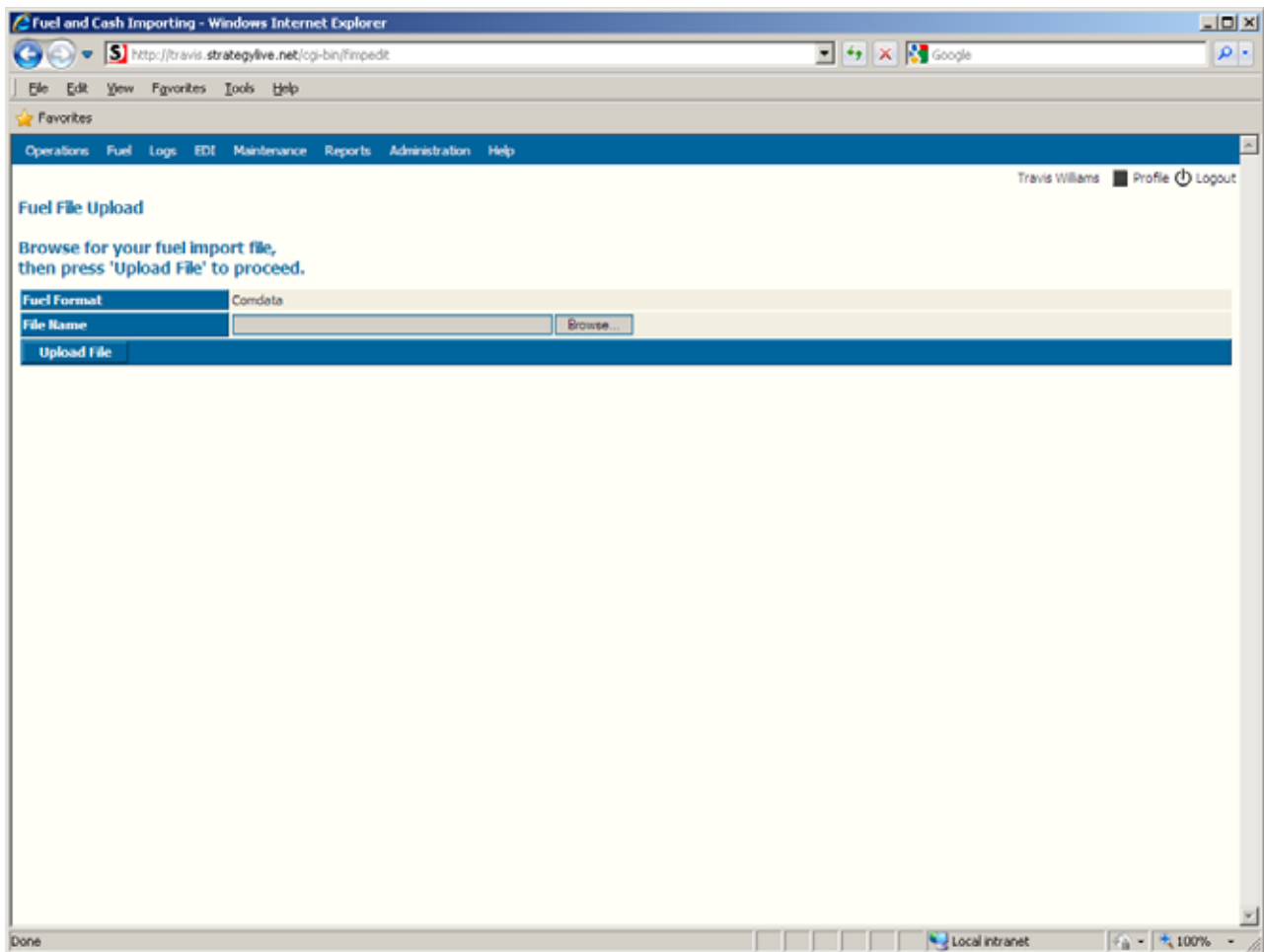
Strategy Live offers two ways to enter fuel purchases and advances. You can import them from Comdata if you are a Comdata account holder or you can manually enter them.

Importing From Comdata

The first step to importing is to contact Comdata and obtain the fuel purchase file. This file needs to be in a .txt format for importing purposes. Once you have downloaded this file you will be ready to import the information into Strategy Live. To import go to Fuel> Fuel and Cash Importing.



This will bring you to the Fuel and Cash Importing screen. To import your file, simply click the Import Fuel File button. This will take you to the Fuel File upload screen.



Select Browse to locate the downloaded Fuel Information file. Once located, choose the file and click open. This will automatically fill in the Filename. Simply click Upload File to import the information to Strategy Live.

The fuel information that's been imported will be listed on the Fuel and Cash Importing screen. Look over these and fix any errors that you may find and then click the Accept button at the bottom. This screen will clear once the stops are accepted.

Tractor Number		Load Number							
<input type="text"/>		<input type="text"/>							
<input type="button" value="Search"/>		<input type="button" value="Reset"/>							
Tractor-#	Driver	Load-#	Date	Ticket-#	Fuel Stop	City	Total	Fuel	Advances
0001	JOHNS	100035	04/02/2005	15485952	LOVES #291	Richmond, KY	202.36	202.36	
0002	TOMMYT	100030	04/11/2005	58572346	WILCO HESS #090	Blacksburg, SC	429.86	429.86	
							632.22	632.22	--
<input type="button" value="Import Fuel File"/>		<input type="button" value="Accept"/>		<input type="button" value="Delete All"/>					

Manually Entering Fuel Purchases

Open the load that needs the fuel purchase entered and click the Fuel button that is located at the bottom.

You will be taken to the Fuel Tax Preparation screen.

Fuel Tax Preparation

Load # 100155 Fuel Status Prepared Lock State Miles

Unassigned Fuel

Mileage Worksheet

Tractor-#	Location/ Fuel Stop	City, ST	Miles	Off-Route For Fuel	Reason	Date
0002		Dallas, TX			Deadhead From	06/12/2009 14:02
0002	10012	Dallas, TX			Load	06/12/2009 14:02
0002	10002	Springdale, AR 72764	343		Unload	06/12/2009 14:02
0002	10008	Rogers, AR 72756	10		Unload	06/12/2009 14:02
			354	--		

State Mileages

Tractor 0002

State	Empty Miles	Loaded Miles	Toll Miles	Fuel Gallons	Fuel Cost
TX	<input type="text"/>	<input type="text" value="78"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
AR	<input type="text"/>	<input type="text" value="78"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
OK	<input type="text"/>	<input type="text" value="197"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
		354	--	--	--

Save Rebuild Mileage Worksheet Refresh Cancel

Click the Fuel Pump with the plus sign to add a new fuel purchase.

Fuel Purchase/Routing

Date: 06/12/2009

Fuelstop ID:

City, ST:

Load #: 100155

Driver #:

Name:

Zip Code:

Tractor #: 0002

Co Driver #:

If this is a fuel routing stop, all fields below this line should be blank.

Type	Units	Per Unit	Cost
Fuel	<input type="text"/> Gallons		<input type="text"/>
Reefer	<input type="text"/> Gallons		<input type="text"/>

Buttons: Create, Create and New, Cancel

Enter the information about the purchase and click the Create button to create the purchase or click the Create and New button to create the purchase and open a blank form to enter another purchase.

Use ADV Miles

Tractors with Xata satellite tracking can use the miles from the satellite instead of PC Miller miles for fuel tax purposes. Contact Strategy Systems, Inc. to have this feature enabled for your system before proceeding.

Enable Drive Performance Monitoring

Before anything can occur in Strategy Live, you will need to contact your representative at Xata and get setup with the Drive Performance Monitoring program.

Configure Tractors To Use ADV Miles For Fuel Tax

Go to Maintenance > Geologic Performance Data > Activate Tractors for ADV Miles. On this page, check the box in the far right column on each tractor that will use the ADV miles. Click the Save button once the tractors are setup. This will need to be done anytime a new tractor is added to the system.

Transfer State Line Crossing to Fuel

Go to Maintenance > Geologic Performance Data > Transfer State Line to Fuel Miles. Run the report for the entire quarter and fix any errors that are displayed. Once all errors have been corrected, click the Process Transfer button. The miles will be sent to the fuel program. Once this is completed you can skip ahead to the Fuel Tax Reporting section of this document.

Fuel Tax Preparation

The next step in fuel tax processing is to prepare each load. Strategy offers two ways to do this: manually or automatically.

Manually Prepare

Simply go to Fuel> Fuel Tax Preparation to manually prepare fuel tax. This will open a list of all the loads to be prepared.

The Fuel Tax Preparation screen is now displayed. Use the search filters at the top to search for specific loads.

Fuel Tax Preparation

Travis Williams Profile Logout

Delivery Date: [] - [] Fuel Tax Status: Unfiled

Load #: [] Customer #: []

Search Reset

Number	Co	Customer	Shipper	Destination	Delivered	Fuel Tax Status
100140	01	Mathews Management Company	Rogers, AR	Dallas, TX	03/25/2008	Not Prepared
100149	01	Mathews Management Company	Buffalo, NY	Springdale, AR	09/25/2008	Not Prepared
100156	01	Mathews Management Company	Springdale, AR	Elephant Butte, NM	04/01/2009	Not Prepared
100002	02		Dallas, TX	Frisco, TX	05/12/2009	Not Prepared
100147	01	Mathews Management Company	Buffalo, NY	Springdale, AR	05/27/2009	Not Prepared
100157	01	Mathews Management Company	Fayetteville, AR	Dallas, TX	05/27/2009	Not Prepared
100183	01	Mathews Management Company	Dallas, TX	Rogers, AR	06/12/2009	Not Prepared
100094	01	Mathews Management Company	Buffalo, NY	Elephant Butte, NM	01/31/2007	Prepared
100095	01	Mathews Management Company	Rogers, AR	Dallas, TX	01/31/2007	Prepared
100096	02	Mathews Management Company	Rogers, AR	Buffalo, NY	03/01/2007	Prepared
100007	02		Elephant Butte, NM	Rogers, AR	03/01/2007	Prepared
100008	02		Rogers, AR	Springdale, AR	03/01/2007	Prepared
100104	01	Multi-Customer	Buffalo, NY	Springdale, AR	04/30/2007	Prepared
100108	01	Mathews Management Company	Rogers, AR	Kansas City, KS	06/27/2007	Prepared
100120	01	Mathews Management Company	Dallas, TX	Buffalo, NY	08/02/2007	Prepared

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Next Last

To prepare the load, simply click on the load number and check to make sure all of the fuel purchases for that load are entered. Once all of the purchases are assigned to the load change the status to Prepared and click the Save button.

A new "Fuel Tax Preparation" page is now open for you to check your information and fill in any necessary information. If you will be manually entering your state mileage at the bottom it is best to select the "Lock State Miles" in the top right hand corner.

Fuel Tax Preparation - Windows Internet Explorer

Fuel Tax Preparation

Load # Fuel Status Lock State Miles

Unassigned Fuel

Mileage Worksheet

Tractor-#	Location/ Fuel Stop	City, ST	Miles	Off-Route For Fuel	Reason	Date
0002 <input checked="" type="checkbox"/>		Dallas, TX			Deadhead From	06/12/2009 14:02
0002	10012	Dallas, TX			Load	06/12/2009 14:02
0002	10002	Springdale, AR 72764	343		Unload	06/12/2009 14:02
0002	10008	Rogers, AR 72756	10		Unload	06/12/2009 14:02
			354	--		


State Mileages


Tractor 0002

State	Empty Miles	Loaded Miles	Toll Miles	Fuel Gallons	Fuel Cost
<input type="text" value="TX"/>	<input type="text"/>	<input type="text" value="78"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="AR"/>	<input type="text"/>	<input type="text" value="78"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="OK"/>	<input type="text"/>	<input type="text" value="197"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
		354	--	--	--


Save Rebuild Mileage Worksheet Refresh Cancel


On the "Mileage Worksheet" there are a few important selectable icons that you will want to use.


View Detailed Route  - Selecting this button opens miler and your route is automatically inserted for you. If you select show miles it will break down mileage by state and highway.


Add Fuel or Fuel Routing Stop  - Selecting this button opens the "Fuel Purchase/Routing" window for you. In this window you can insert a route if you sent a tractor out of route. You must select create for your changes to be saved.

Type	Units	Per Unit	Cost
Fuel	<input type="text"/> Gallons		<input type="text"/>
Reefer	<input type="text"/> Gallons		<input type="text"/>

Edit Fuel Stop  - Selecting this button also opens the “Fuel Purchase/Routing” window for you. From this page you can edit.

Move Fuel Stop Up  - Selecting this button will move the selected fuel stop up one line before the previous location on the list. (Keep selecting until stop is in proper location)

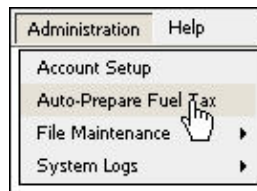
Move Fuel Stop Down  - Selecting this button will move the selected fuel stop down one line past the next location on the list. (Keep selecting until stop is in proper location.)

Remove Fuel Stop From Load  - Selecting this button will delete the selected fuel stop from the load.

Once you have prepared fuel tax for the load, you are ready to click save. After clicking save, the status on the “Fuel Tax Preparation” page changes from “Not Prepared” to “Prepared.”

Automatically Prepare

To automatically prepare fuel tax, hover over “Administration” and select “Auto-Prepare Fuel Tax.”



This will open the “Auto-Prepare Fuel Taxes” window. Simply enter the appropriate date range and click the “Prepare Loads” button.

The "Auto-Prepare Fuel Taxes Report" will be displayed.

Auto-Prepare Fuel Taxes

WARNING:
This utility will mark all unprepared loads as prepared.
You are responsible for auditing all loads.

Delivery Date -

Number	Co	Customer	Shipper	Destination	Delivered	Fuel Tax Status
100029	01	Mathews Management Company	Buffalo, NY	Springdale, AR	04/06/2005	Prepared
100031	01	Mathews Management Company	Springdale, AR	Jacksonville, FL	04/06/2005	Prepared

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Fuel Tax History For Loads In This Date Range

Status	Total Loads	Included In Report	Excluded From Report	Missing Fuel Tax
Not Ready	0	0	0	0
Not Prepared	0	0	0	0
Prepared	1	1	0	0
Filed	0	0	0	0

Fuel Tax Reporting

Now that you have finished preparing fuel tax for loads you are ready to generate "Fuel Reports."

Tractor Fuel Report

To generate "Tractor Fuel Report" hover over the "Fuel" menu on the "Fleet" screen. Go down to the "Reports" menu and select "Tractor Fuel Report."

Fuel Logs EDI Maintenance Reports Administration

Fuel and Cash Importing

Fuel Tax Preparation

Reports ▶

Mark Loads as Filed

Edits ▶

Fuel Purchases By Provider

Tractor Fuel Report

Fuel Audit Report

Fuel Tax Computation By State


Now the "Tractor Fuel Report" search window has opened. Enter information into the search filters and then select "Generate Report."





Tractor Fuel Report

Delivery Date -

Tractor Number -

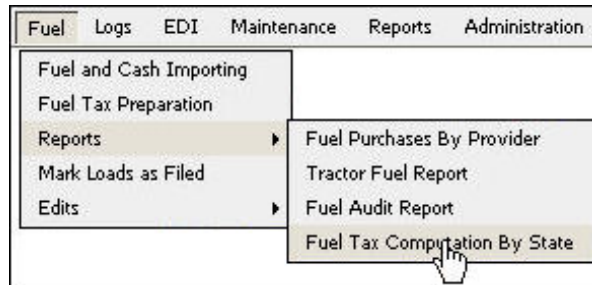
State Show State Detail?

You will need the MPG from this report when you do your "Fuel Tax Computation By State." To print "Fuel Tractor Report" click the print icon .

Tractor Fuel Report							
Delivery Date	06/05/2003		-		06/05/2003		   
Tractor Number			-				
State					Show State Detail?		<input type="checkbox"/>
Tractor State	Loaded Miles	Empty Miles	Total Miles	Fuel	Cost	PPG Cost/Mile	MPG Fuel Tax Status
110	1519		1519	198.00	296.80	1.499	0.195 7.672 Prepared
	1519	--	1519	198.00	296.80	1.499	0.195 7.672
Fuel Tax History For Loads In This Date Range							
Status	Total Loads	Included In Report	Excluded From Report	Missing Fuel Tax			
Not Ready	1	0	1	1			
Not Prepared	0	0	0	0			
Prepared	1	1	0	0			
Filed	0	0	0	0			


Fuel Tax Computation By State







To generate "Fuel Tax Computation By State" hover over the "Fuel" menu on the "Fleet" screen. Go down to the "Reports" menu and select "Fuel Tax Computation By State."



Now the "Fuel Tax Computation By State" search window has opened. Enter information into the search filters and then select "Generate Report."

Fuel Tax Computation By State			
Delivery Date	06/05/2003	-	06/05/2003
Tractor Number		-	
Fleet MPG	7.672		
Generate Report		Cancel Report	

For a paper copy of "Fuel Tax Computation By State," select the print icon  when the report is displayed.

Fuel Tax Computation By State								
Delivery Date	06/05/2003 		- 06/05/2003 					
Fleet MPG	7.672							
   								
State	Total Miles	Taxable Miles	Taxable Gallons (Consumed)	Tax Paid Gallons (Purchased)	Net Taxable Gallons	Tax Rate	Tax Due	
AR	41	41				0.2250		
CT	98	98				0.2600		
IL	162	162				0.2870		
IN	157	157				0.1600		
						SURCHARGE	0.1100	
MA	65	65				0.2100		
MO	292	292			198	-198	0.1700	-33.66
NY	72	72				0.3125		
OH	280	280				0.2400		
						SURCHARGE	0.0300	
PA	352	352				0.3080		
	1519	1519	--		198	-198		-33.66

Fuel Tax History For Loads In This Date Range				
Status	Total Loads	Included In Report	Excluded From Report	Missing Fuel Tax
Not Ready	1	0	1	1
Not Prepared	0	0	0	0
Prepared	1	1	0	0
Filed	0	0	0	0

Mark Loads As Filed

After running the "Tractor Fuel Report" and the "Fuel Tax Computation" you are ready to mark your loads as filed.

Hover over the "Fuel" menu and select "Mark Loads As Filed."



The "Mark Loads As Filed" screen is now open. In the "Delivery Date" field you must type in the same "Delivery Date" range of the "Fuel Tax Computation By State" report you finished earlier.

Mark Loads As Filed

WARNING:

Do not file loads until all loads for this period have been Prepared, and you have successfully run the Fuel Tax Computation by State report. Once a load has been filed, it will no longer show up on the Fuel Tax Computation by State Report.

Delivery Date - (loads will be Filed as of this date)

A "Mark Loads As Filed" confirmation screen will open to confirm that you have successfully filed your loads.

Mark Loads As Filed

WARNING:

Do not file loads until all loads for this period have been Prepared, and you have successfully run the Fuel Tax Computation by State report. Once a load has been filed, it will no longer show up on the Fuel Tax Computation by State Report.

Delivery Date - (loads will be Filed as of this date)

Filed 2 Loads

Fuel Tax History For Loads In This Date Range				
Status	Total Loads	Included In Report	Excluded From Report	Missing Fuel Tax
Not Ready	0	0	0	0
Not Prepared	0	0	0	0
Prepared	2	2	0	0
Filed	0	0	0	0

Printing this page will complete your "Fuel Tax Preparation."