

TRANSPORT PRO

Fuel Tax Reporting With ProMiles® FuelTaxOnline



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Overview

Transport Pro offers integration with ProMiles for processing fuel taxes. At its root, fuel tax is based on the miles you run in a state, and the fuel purchased in various states. Transport Pro assists you in this process by calculating state-to-state mileage in ProMiles, using the dispatch records entered in Transport Pro. Secondly, Transport Pro can download fuel purchases from most major fuel card providers, which not only helps with settlements, but also inputs purchases directly into the Fuel & Mileage Report needed for fuel tax purposes.

If you would like to setup your ProMiles account with Transport Pro, please contact your Transport Pro customer service representative.

This document outlines the typical flow of managing your dispatch records, purchased fuel, reporting from Transport Pro, and transferring the data to ProMiles.

State Mileage – Dispatch Records

It is imperative that companies report the proper state mileage for both loaded and unloaded miles in each state. Transport Pro's integration with the ProMiles Prime system will save tremendous amounts of time when calculating state mileage versus manual trip sheets. However, to calculate accurate state-to-state mileage, it is important for dispatchers to properly enter loads and corresponding dispatch records. The reported miles are only as good as the data entered by users.

Tips for entering loads and dispatches:

Load Entry

- Use zip codes for each pickup and delivery location if available. Zip codes will provide a more accurate mileage calculation than just the city and state.
- If the load has multiple stops, be sure to enter each stop. Transport Pro will
 calculate the trip miles to and from each stop, which can drastically effect
 mileage reporting.

Dispatch

- Transport Pro reports mileage based on the delivery date of the load. Be certain to enter the correct delivery date for each dispatch record.
- When dispatching a driver on a multi-stop load, be sure the correct stops are selected for the dispatch.
- If splitting a load on multiple trucks, be certain to select the appropriate pickup and delivery points for the dispatch.
- Empty moves are just as important as loaded moves. Transport Pro attempts to make a logical connection between loads, and warns users if a load is dispatched out of order. Dispatchers should always ensure empty moves are properly entered.

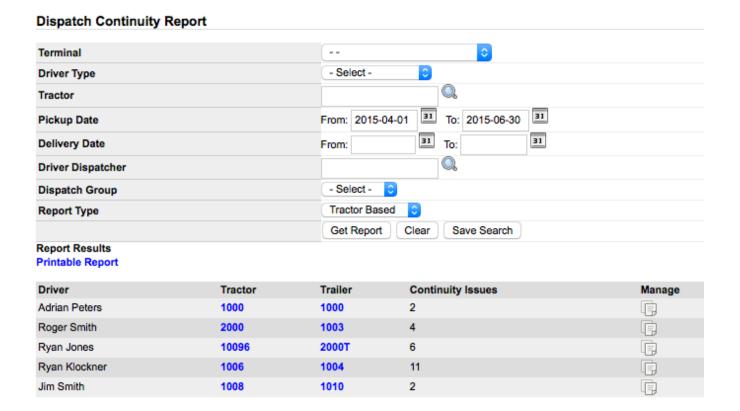


Dispatch Continuity Report

When you get ready to process the Fuel & Mileage Report in preparation for your FuelTaxOnline entry, you should review the Dispatch Continuity Report. Transport Pro recommends you review this report on a weekly basis to make certain dispatchers are entering dispatch records correctly. If you wait until the end of a quarter to clean up mistakes, it could take hours to adjust the dispatch records.

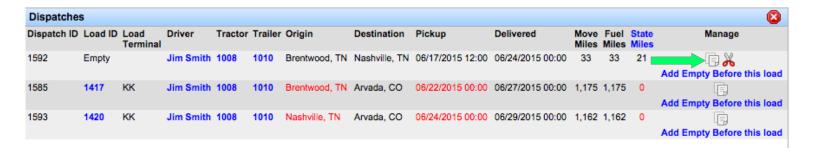
The Dispatch Continuity Report can be found under the Load Management menu, under Reports. There are several different filters you can use to analyze dispatches. For example, you can search by terminal, dispatcher or even equipment. Dispatchers can review and correct their driver dispatches by running the report and entering their Dispatcher name.

When preparing for Fuel Tax, Transport Pro analyzes all drivers and dispatches. Again, the state mileage reporting is based on the delivery date of the dispatch record. To review the dispatches for the quarter, set the Delivery Date filter option to the start and end of the quarter that needs to be reported. Clicking Search will produce a list of equipment that contain dispatch continuity problems. This is typically due to dispatches entered out of order or missing empty move records, but it could also be missing state miles due to bad city names or zip codes.





To review and correct the problems, click on the Manage icon for each row. When you click the Manage icon, a small popup window will open and show a list of the dispatch records. The system will highlight the suspected problems in red text.



The dispatch records can be edited using the Manage icons, or you can add empty moves as needed using the "Add Empty Before This Load" link. If you see missing state miles, this means the system could not properly calculate the trip miles from the ProMiles system. This is typically due to a misspelling in one or more of the city names on the dispatch. Edit the dispatch record, check the city names and zip codes, and then click Save. When you close the dispatch window the state miles will be recalculated based on your changes.

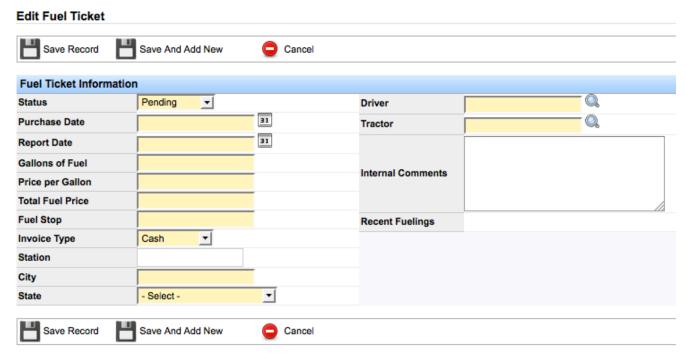
Fuel Purchases

The second set of items needed to calculate fuel tax are the fuel purchases incurred each quarter. Transport Pro integrates with most major fuel card providers and will download your fuel purchases each day. The transactions are not only pushed to the Settlements system, but are also entered into the Fuel Ticket system. The Fuel Ticket management menu is located under the Drivers/Equip menu. Using this module, you can review the fuel tickets downloaded from your fuel card provider as well as cash tickets entered on behalf of the driver.



Cash Fuel Tickets

If your drivers turn in fuel purchase receipts, you will need to enter those fuel purchases manually into Transport Pro. Click on the Drivers/Equip menu and navigate to the Fuel Tickets sub menu. In addition to searching and reviewing fuel tickets, you can add new tickets by clicking Add Fuel Ticket. From this screen you can enter the cash tickets you receive from drivers, and assign the appropriate gallons, price, fueling location, and the correct tractor and driver.



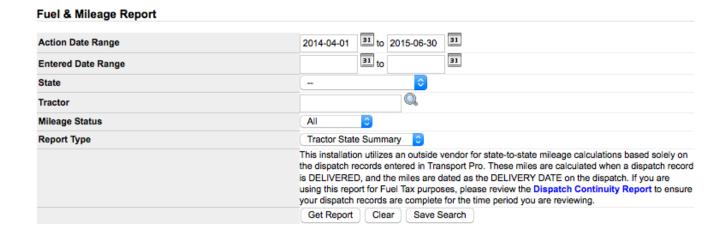
Enter Cash Fuel Tickets

Transport Pro Fuel & Mileage Report

The Fuel & Mileage Report in Transport Pro is the tool required to summarize all of the state mileage and fuel purchases in the ProMiles FuelTaxOnline system. Once you have reviewed the Dispatch Continuity Report, and have entered all of your fuel purchases, you are ready to run the Fuel & Mileage Report. The report can be found under the Drivers/Equip menu, under the Reports menu. As with most Transport Pro reports, users are presented with several different ways to filter the report data. The Fuel & Mileage Report is typically used for summarizing all equipment transactions, but it is possible to filter the report by state or specific tractor.

For Fuel Tax reporting, you need to determine if you are going to report your Fuel Tax per tractor or simply combine all equipment. Owner Operator companies will most likely want to break down fuel tax by unit, whereas company truck organizations may choose to report all fuel tax together. If you ultimately want to break out the fuel tax per tractor, choose Report Type: Tractor State Summary. This will produce a report that lists the mileage and fuel purchased by each tractor in each state.





If you choose to report all miles and fuel purchases together, you can run the report using Report Type: State Summary. This will summarize all mileage and fuel purchases by state. The results of the report by unit will look similar to the screen shot below. You can see that each tractor along with its current owner is listed on the report with a breakdown of data by state. The loaded and unloaded miles along with the fuel purchases will be entered into ProMiles FuelTaxOnline. Transport Pro recommends printing this report so you may cross off units as you enter them into ProMiles FuelTaxOnline.

| Tractor ID | State | Owner | Loaded Miles | Unloaded Miles | Total Miles | Gallons Purchased | Fuel Total |
|-----------------------|-------|-------------|--------------|----------------|-------------|----------------------|------------|
| 1000 | AL | Mark Peters | 141 | 0 | 141 | 0.00 | \$0.00 |
| 1000 | KY | Mark Peters | 232 | 232 | 464 | 0.00 | \$0.00 |
| 1000 | ОН | Mark Peters | 293 | 210 | 503 | 0.00 | \$0.00 |
| 1000 | TN | Mark Peters | 121 | 47 | 168 | 0.00 | \$0.00 |
| 2000 | AL | Ryan Jones | 377 | 0 | 377 | 0.00 | \$0.00 |
| 2000 | AR | Ryan Jones | 0 | 284 | 284 | 0.00 | \$0.00 |
| 2000 | CO | Ryan Jones | 0 | 181 | 181 | 0.00 | \$0.00 |
| 2000 | GA | Ryan Jones | 120 | 109 | 229 | 0.00 | \$0.00 |
| 2000 | KS | Ryan Jones | 0 | 388 | 388 | 0.00 | \$0.00 |
| 2000 | MS | Ryan Jones | 236 | 0 | 236 | 0.00 | \$0.00 |
| 2000 | ОК | Ryan Jones | 0 | 242 | 242 | 0.00 | \$0.00 |
| 2000 | TN | Ryan Jones | 24 | 147 | 171 | 150.00 | \$538.50 |
| 1006 | IL | Don Rogers | 215 | 0 | 215 | 0.00 | \$0.00 |
| 1006 | IN | Don Rogers | 77 | 0 | 77 | 0.00 | \$0.00 |
| 1006 | KY | Don Rogers | 52 | 0 | 52 | 0.00 | \$0.00 |
| 1006 | TN | Don Rogers | 68 | 0 | 68 | 100.00 | \$379.00 |
| 1008 | AL | Jim Smith | 302 | 0 | 302 | 0.00 | \$0.00 |
| 1008 | GA | Jim Smith | 116 | 0 | 116 | 0.00 | \$0.00 |
| 1008 | MS | Jim Smith | 118 | 0 | 118 | 0.00 | \$0.00 |
| 1008 | TN | Jim Smith | 12 | 21 | 33 | 500.00 | \$1,645.00 |
| 104 | IN | Bruce Lee | 0 | 0 | 0 | 215.36 | \$760.00 |
| 104 | KY | Bruce Lee | 232 | 326 | 558 | 0.00 | \$0.00 |
| 104 | ОН | Bruce Lee | 248 | 498 | 746 | 0.00 | \$0.00 |
| 104 | TN | Bruce Lee | 55 | 47 | 102 | 100.00 | \$255.00 |
| Current Page Total | | | 3,039 | 2,732 | 5,771 | 1,065.36 | 3,577.50 |

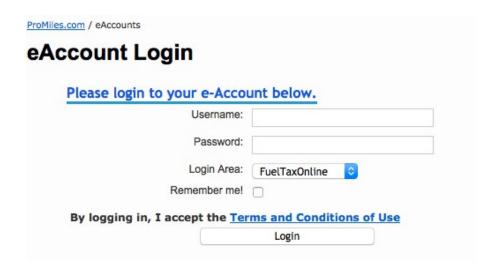


ProMiles FuelTaxOnline

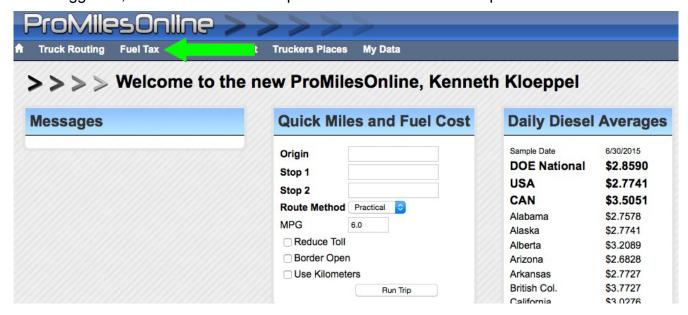
Once you have your Fuel & Mileage Report generated from Transport Pro, you have to enter that information directly into ProMiles. This is a manual process, but ProMiles makes the data entry easy and the reporting even easier. You need to contact ProMiles to establish your FuelTaxOnline account.

Miles and Fuel Entry

Log in to your ProMiles FuelTaxOnline account.



Once logged in, click Fuel Tax in the top menu of the ProMiles web portal.



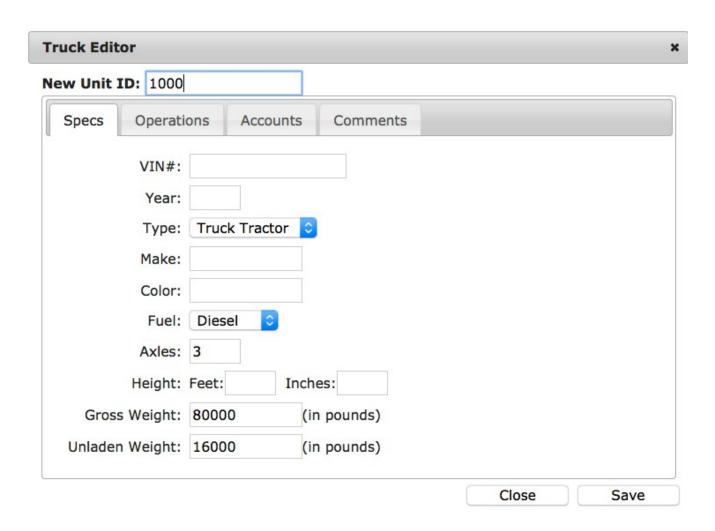


If this is your first time using the ProMiles FuelTaxOnline system, you need to setup your units (tractors). In addition, you also need to set up any new units added to your fleet this quarter. If you are reporting fuel tax for each truck in your fleet, you need to set up an equipment record for each tractor.



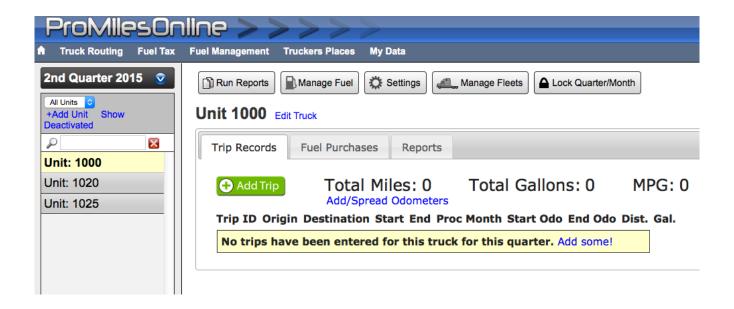
Clicking on the Add Unit link will open a popup window, where you enter the information regarding the unit. The unit number at the top of the form is the only required entry, but Transport Pro recommends you complete the information regarding weight, truck type and dates of service, as they may be used in your Fuel Tax calculation.

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After you have set up your fleet, you're ready to begin entering the mileage and fuel information from Transport Pro. In the left navigation menu of ProMiles Fuel Tax, click the Unit number for which you wish to enter the current trip miles and fuel purchases.





Click on the Add Trip button to begin a new trip. You do not need to enter each trip/load a tractor took in a given quarter, but rather the state mileage totals for all trips as calculated from your Transport Pro dispatch records. In addition, you can either authorize ProMiles to download fuel purchases from your fuel provider, or you can use the fuel summary from Transport Pro, included in the Fuel & Mileage report. Here are a few items you will need to manage the data:

Trip ID

 While not required, you may want to get creative with your Trip IDs in ProMiles so that you can easily reference which trip is for which quarter or month, depending on how often you enter trips into ProMiles.

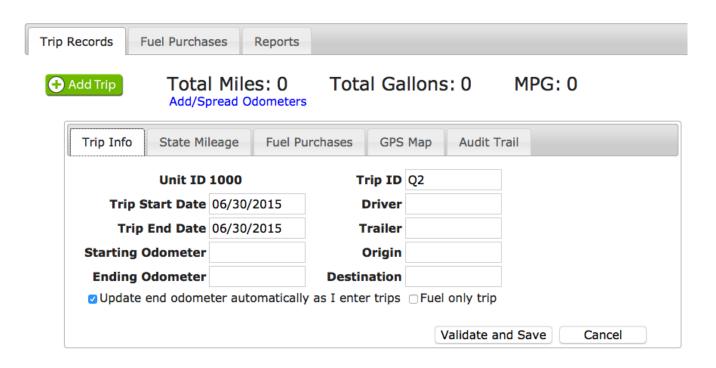
Trip Date

- The trip date will need to be logical according to when you are running your Fuel & and Mileage Report. For example, if you decide to enter trips and fuel at the end of each month, you may want your date to be the last day of the month. If you are only going to do it quarterly, then you may want it to be the last day of the quarter.
- In either case, make sure you set the trip date within the quarter you are reporting.

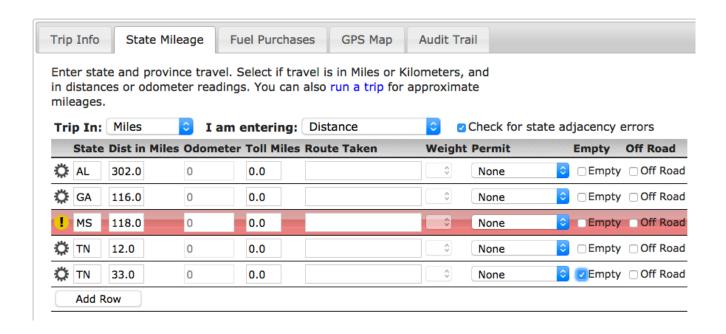
Trip Origin & Destination

 These are required fields in the ProMiles system, but you may set the values to be the same. For example, Nashville, TN to Nashville, TN



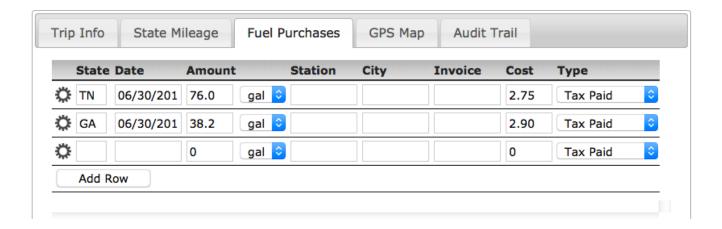


Once you set your base Trip information, click on the State Mileage tab to enter the loaded and empty miles for each state for this unit from the Transport Pro Fuel & Mileage Report. You must enter the distance in each state, NOT the odometer readings. Keep in mind, you may see a red line in the ProMiles system when state miles are entered in a non-adjacent order. You must order the entries so this does not occur.

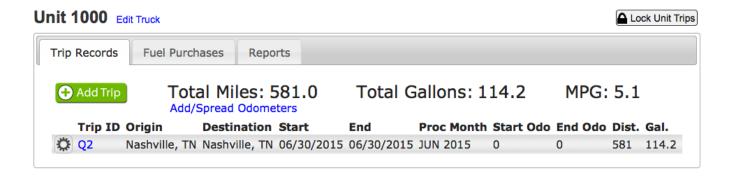




Next, enter the fuel purchases for each state. Click on the Fuel Purchases tab. Enter the total fuel gallons and total purchase price for each state.



Finally, double check all of your data entry points and click the Validate And Save button. Assuming your state miles line up, you will be taken back to the summary screen for the Unit showing the newly entered trip, along with the total miles, total gallons, and MPG. At this point you may also want to use the Lock Unit Trips option to make sure someone cannot inadvertently edit the trips you have entered.





Fuel Tax Reporting

Once you have entered all of the units and trips for the given quarter, you are ready to create the fuel tax reports. From the FuelTaxOnline portal, click Run Reports. From the Reports page you can run the IFTA fuel tax reports, along with many other fleet reports. For more information regarding configuration or options for ProMiles FuelTaxOnline Reports, please contact ProMiles directly.

