IFTA Workflow in Depot

An IFTA report is filed every quarter. Current rules allow you thirty days after the quarter ends to submit your report. See the EROAD help site for more details.

1. Setup your fleet BEFORE the IFTA quarterly reporting period if you want to use the IFTA report for filing. Keep paper records for all vehicles not setup. See Setup Your Fleet.

   IMPORTANT NOTE:
   If your fleet is setup for IFTA during a reporting period, data will be missing from the report from the beginning of the quarter to the date you assigned the IFTA tax service to your vehicles.

   For example: If your fleet is setup on February 1st, distance (mileage) data from January 1-31 will be missing and cannot be added to your January – March IFTA report in Depot. The following quarter will be complete.

2. Ensure you enter all fuel transactions for your vehicles into Depot. See Add Fuel Transactions.

   You can allow your drivers to add fuel transactions from the Ehubo, your staff can enter transactions manually, or you can upload fuel card transactions from your fuel provider. Alternatively, if you use ComData, you can arrange to have fuel card transactions automatically added into Depot.

3. Complete the process to file your quarterly report for IFTA. See Quarterly Report Process

Setup Your Fleet for IFTA

You must have the Client Administrator role in Depot to complete the following two functions. You can enter multiple IFTA state licenses based on your reporting requirements, and locations where vehicles are based.

1. Enter IFTA licenses registered with your organization.

    1.) Click ⚙, **Administration > My Organization.**
    2.) Click the **Manage IFTA Licenses** link.
    3.) Click **Add New IFTA License**.

        a. In Base Jurisdiction, select the state you are adding from the list.

        b. Enter the license number in the blank field.

        c. Click **Update IFTA Licenses.**

2. Assign the IFTA license for each vehicle.

    1.) Click ⚙, **Administration > Vehicles / Assets**.
    2.) Click a vehicle name from the Manage Vehicle list.
    3.) Click the **Manage Tax Services** link.

        a. Check the **IFTA tax** box.

           You can also check the IRP and Weight-mileage tax boxes, if applicable to the specific vehicle.

        b. From the IFTA License dropdown list, select the state license applicable to where the vehicle, not the organization, is based.

        c. Click **Update Tax Services** to save.

Add Fuel Transactions

You can use any method below to add fuel transactions to Depot but watch for duplicates if your driver adds transactions and you upload a bulk report.

Allow drivers to add fuel transactions

The in-cab device feature allowing drivers to add fuel transactions can be enabled or disabled based on your plan. Contact EROAD for details.

1. From the Ehubo, press **Fuel**.
2. Enter the gallons purchased, and press **Enter**.

    The entry is automatically sent to the Fuel Transaction Management report in Depot as diesel fuel and calculated into the IFTA data.

Enter single fuel transactions into Depot

Client Administrators can upload fuel transactions in real-time or retrospectively.

1. Click **Reports**, under Fuel, click **Fuel Transaction Management**.
2. From the upper right, click the **New Fuel Transaction** button.
3. In the Add Fuel Transaction popup, enter the fuel and data information. Items with an (*) asterisk require input for tax reports.

Upload a bulk transaction list from a fuel provider

1. Click **Reports**, under Fuel, click **Fuel Transaction Management**.
2. From the upper right, click the **Fuel Record Upload** button.
3. In the Add New Transactions page, drag and drop a CSV or Excel file of your transactions.

    Important Note:
    You list must list all heading names, and placement in the header row exactly as illustrated in the example in Depot. Or you can download a sample file with instructions. Also, ask your fuel provider if they can send you the file in our format.

Quarterly IFTA Report Process

1. **Before you begin, ensure all fuel transactions are entered or uploaded.**

   For instructions, go to Add Fuel Transactions. Also, check to ensure all IFTA-qualified vehicles with an installed Ehubo are included in the report. If not, add data from paper records before filing.

2. **Review your IFTA mileage and fuel data for the quarter.**

   EROAD automatically records and processes distance and fuel information for each vehicle and trip during the reporting period. All data you require for filing a quarterly return is summarized in the IFTA report. The IFTA Fleet Summary report provides the required summaries for compliance and to help in your review. NOTE: This is NOT the same report as found under *Reports > Fleet, Fleet Summary*.

   A link to the FTR (IFTA Fuel Trip Record) summarizes all fuel, mpg, and trip information for each vehicle per month.

   To access the report:

   1. If the reporting period is over, click **TAX**, from the IFTA tab. Go to the **Fleet Summary Report** button.
      Otherwise, the report is always available to view by clicking **Reports**, under Tax, click **IFTA Fleet Summary.**
   2. From the upper options, click **By Vehicle/Show Details.**
   3. From the *IFTA Fleet Summary*, validate your data for the quarter as follows:

   <div style="color:red">Analyze your distance data</div>

   Review all distance, location and state crossing information.

   1.) Review the distance travelled, and IFTA mileage for each vehicle.
   2.) Click the FTR link or the vehicle name to review all IFTA-related trips.
   - To review a specific trip in detail, click the date link to open the trip *Daily Activity Report*.

   <div style="color:red">Analyze your fuel data</div>

   Verify all fuel transactions are entered and no duplicates exist.

   1.) Review the mpg for each vehicle.
   - If the mpg value is red, it reflects an unusually high or low mpg based on a 4-8 mpg average. This can occur if there are missing fuel transactions, duplicates, or incorrect values entered. Validate and resolve before filing.
   2.) Validate and resolve red mpg values before filing.
   - Click the red mpg link to go to the *Fuel Transaction* report for that vehicle. You can review all fuel transactions in one place.

3. **Prepare and file your return.**

   You must obtain the actual tax calculations from each jurisdiction that is applicable to your organization. The headings in the report coincide with paper reports so you can easily transfer information. Download a CSV file of your IFTA data for your records and to assist in filling out your quarterly IFTA return.