

## IFTA MANAGER CHEAT SHEET

What you need to remember most about your RDP connection to your server is actually when you need to disconnect!

- Always make sure you close any open programs, especially IFTA Mgr.
- Then always hit the big red LOG OFF button on your desktop, do NOT hit the X in the upper right hand corner.

If you ever mess up either of those, just connect again and go thru the proper procedure ☺

### The proper order of functions for IFTA Mgr Operations

- Trucks
- Fuel
- Trips
- Quarterly Tax File Import from IFTA website
- Reports

If you think it though logically of course your **trucks** need to be in place first! But after initially getting your trucks entered into the new program, we have you covered for the future! There is a handy dandy add feature in the fuel transaction screen that I can show you in detail when needed.

Next step is import your **fuel** download files. You can do this monthly or quarterly, your choice. Your fuel NEEDS to be in place before you import your trips. Of course, we always have a way to help you if there are booboos, BUT it is MUCH easier if you follow the proper procedure. You always want to go through your fuel transactions and fix anything that shows red, meaning something is missing (it usually is a valid truck id). After you have reviewed and fixed your fuel transactions AND entered in any manually transactions that might have occurred you are ready for the next step!

FINALLY the heart of the matter... **TRIPS!** Now that you have everything in place IFTA Mgr can do its magic as you import your trips. It will combine the fuel information as it imports! It really is magic. You will probably notice there are some colors on your trip browser. Those are to help you notice any trip that may not have all of the information it needs. These are based on mpg by default but can also be user-defined and usually indicate there is fuel missing or incomplete. You can run an Uncommitted Fuel Report to help you find any fuel that did not make it to a trip. You can always manually add a fuel transaction to a trip by editing the trip and hitting the GET FUEL button.

After you have reviewed your trips all you need to do is make sure you have the quarterly **tax file update** from the IFTA website, run your **reports** and FILE!