BASIC SYSTEM NAVIGATION

After signing into the Fuels Tax System the Home screen is displayed. The default display is shown below but it can be configured as needed. The Home screen is also known as the Dashboard.

The calendar, as well as other items placed on the Dashboard, are known as Widgets.

At the upper left corner of the screen, a blue bar may be displayed indicating “Widgets have been hidden due to access level restrictions”. Additional widgets may be added by selecting the “Tools” drop-down menu. From this menu select “Create Dashboard”.

Figure 1. Home Screen

Figure 2. Dashboard Tools menu
This will bring up the option to give the dashboard a name and select a specific layout.

Enter a dashboard name, select from one of the six layout options, then click the “Submit” button at the bottom.

This will bring up a blank screen, and the “+ Add Widgets” option next to the “Tools” menu is now available.

Click on this option to select the widgets you want on your dashboard.

There are five widgets to choose from:
- Calendar
- Message Center
- Tax Session Counts per Period
- Tax Session Status per Period
- Tax Session Workflow

Click on a widget and then click the “Add Widget” button at the bottom of the screen. The widget will appear behind this window on the upper left of the Dashboard. Select other widgets in this same manner and then click “Close”.

Once the widgets are added to the Dashboard, you can ‘drag and drop’ to put them where you want them within the screen layout.
The ‘mini menu’ to format each widget is at the upper right corner of the widget’s title bar. Hover your mouse on the right side to reveal the formatting options.

From left to right the options are:

Minimize the widget on your home page

Refresh the widget data (also auto-refresh options)

Format the widget (color, number of items to display,

Remove the widget (can be restored at any time)
The Dashboard shown below has three widgets in a two-column format. The title bar names have been modified, along with the bar display colors. Refresh periods for each widget can be set separately.

At the top left of your screen is a set of tabs for various functions.

The first tab returns you to your Dashboard. The second tab is “Tax Filing”.

From this tab you can:
View or add a tax report (Tax Sessions)

Review or add schedule transactions (Transactions)

Check transaction validations

View the tax report, and

The “eFiling” tab provides a screen to upload tax report schedule detail in XML format. An XML file contains the licensee information and the reporting period, so you do not have to create a specific tax session to upload these files.

The “Maintenance” tab provides several levels of information in the Fuels Tax System.

There are five sub-menus from this tab:

**Business Entities** contains a list of companies that are registered with the Fuels Tax Group (Master Company ID 0). These companies could be your suppliers or customers. You may also add supplier, carriers, and customers to this list to make it easier to complete your tax reports. Companies you add may only be viewed by your company (your company ID will show rather than 0).
Companies lists the accounts established for the company, and the applications that are available for other licenses. The “Details” tab has the company name. The “Information” tab is the data provided when licensed, and can be updated.

Locations lists the locations that are registered with the Fuels Tax Group, and also fuel terminals. This information is used when completing tax reports.

Taxpayer Contacts users assigned to your company are added to the contact list, but you can also “Add New Record” and customize your list with additional contacts.

Terminals list of fuel terminals in the US. This list can be searched, filtered, sorted, or downloaded to excel.

The “Account” tab displays the status of the company registrations, and the option to apply for additional licenses when needed.

Select “Registration” and then “Registration Status” to apply for a new license, register your fuel tax bond, or submit a license cancellation request.

“Management” has five additional options:

Company Balance a high level overview of any balance the company owes (or has overpaid) on the various accounts held by that company. Clicking on the balance line will open a menu to allow you to make a payment, view account activity, and view payment history.

Account Activity the entries that make up the balance (tax due, credits, and payments)

Payment History a listing of payments made, including date, tracking number, payment type, status, and amount.

Payment Processing Setup allows you to set up automatic payments for fuels tax reports, or saves payment information to streamline the payment process

Make Payment displays current amounts due, any past due amounts, and allows the user to designate the amount being paid.
Some roles may not have access to input data in all of these options. Check with your company administrator if you need access to additional screens.

The “Admin” tab is the last of the six menu options for company administrators.

This tab contains five sub-menus to help manage your activity.

**Change Password**
The system will take you to this screen anytime you request a password change, whether it’s your first logon with a temporary password, or when you click “Change Password” from another screen.

**Message Center**
Displays messages sent to the administrator from the Fuels Tax System regarding the company account. This screen generally cannot be viewed by other roles.

**System Activity**
shows system activity including status, date, process, description, and user name.

**User List**
a list of the users assigned to this company. The administrator can click on a user name to change their access role, update contact information, reset a password, or disable access to the system.

**User Profile**
displays the profile of the current user. You can enter your password in the box and click “Unlock Profile” to update your own contact information, time zone, and security questions.

**VIEWING MULTI-COLUMN DATA, SORTING, GROUPING, FILTERS, AND EXPORTS**

Many of the options for business entities, location information, terminals, and similar databases have thousands of listings. A filter function is available to limit the information displayed to just what is needed. The filtered information can then be exported to excel.
Data displayed can also be altered by which columns are being displayed. Select “Columns” to display the list of columns available in the database (list displayed in a pop up box). Check or un-check the columns to get the desired columns in the display. This is often used to reduce the data viewed to fit the screen. Each database listing will have different columns based on the data involved.

Sorting is another option for viewing the data in a particular way.

To sort by a particular column, click the header for that column. A little triangle will appear in the sorted column, and the shading will become darker. To sort A → Z, click once, and the triangle will point down. To sort Z → A, click twice and the triangle will point up. Clicking the triangle or title a third time will remove the sort.
Another way to reduce the information to be reviewed is to group by a selected header. Click on “Group By” in the upper right hand corner, and drag the column header to the new row created below the “Locations” tab. The example below shows the data grouped by “Region/State”.

More than one column header can be selected to perform the grouping function. To hide a group, click on the minus sign icon to minimize that section. The selected group will then show a plus sign icon where the detail can be expanded.

Filtering is another option to narrow the results of a search. Click on the “Filter” icon and filter boxes and symbols will show in each column being displayed. For fields that have date entries, a calendar icon is also displayed.
Multiple columns can be filtered at the same time.

Enter the criteria in the filter box and click on the icon next to it to display an options drop down box. This box contains selections that help filter the data accordingly. Select “Contains” or “Starts With” to help narrow the options.

Clear all filters by clicking on the filter icon again in the upper right corner.

This information can also be exported to excel. At the bottom of the window in the lower right corner, select “Export as Scheduled Task – Excel” or “Export as Scheduled Task – CSV” for the preferred format.
Click on the “Export” button and the screen will change to the “Exports” tab.

When the green check mark appears in the left box and the status is “Passed” the filtered data is ready to view in Excel. The exported information will only contain the columns selected in the view, and the records returned from the filter. Click on the output file to open the excel file.
Click on the “Locations” tab (just above the green check mark) to return to the filtered data, or any other tab on the menu for additional tasks.