

Flatirons Sample Setup Sheet

Illustrative example of the setup format

This sample shows the format used to organize monitored items and dates. Actual monitored items may vary by client and industry.

1. Client details

| | | | |
|-----------------------------|-----------------------|---------------------------------|-------------------------|
| Client Legal Name | Example Logistics LLC | Primary Contact | Daniel Mercer |
| DBA / Operating Name | Mercer Freight | Primary Contact Email | daniel@mercersample.com |
| USDOT Number | 1234567 | Primary Contact Mobile | (303) 555-0184 |
| MC Number (optional) | MC-987654 | Preferred Reminder Email | ops@mercersample.com |

2. Monitored items

| Monitored item | Due date | Notes |
|-------------------|-------------|-------------------------|
| UCR Renewal | 31-Dec-2026 | Annual |
| IRP Renewal | 15-Nov-2026 | Base jurisdiction cycle |
| IFTA Q1 Due Date | 30-Apr-2026 | Quarterly filing due |
| IFTA Q2 Due Date | 31-Jul-2026 | Quarterly filing due |
| IFTA Q3 Due Date | 31-Oct-2026 | Quarterly filing due |
| IFTA Q4 Due Date | 31-Jan-2027 | Quarterly filing due |
| Insurance Renewal | 01-Sep-2026 | Policy anniversary |

3. Equipment or asset renewals

| Type | Asset / VIN ending | Reg. renewal | Permit renewal | Type | Asset / VIN ending | Reg. renewal | Permit renewal |
|---------|--------------------|--------------|----------------|---------|--------------------|--------------|----------------|
| Tractor | 102 / 4K58 | 11-Aug-2026 | 19-Sep-2026 | Tractor | 121 / 5T184 | 11-Oct-2026 | 19-Nov-2026 |
| Tractor | 104 / 9L203 | 12-Aug-2026 | 20-Sep-2026 | Tractor | 126 / 2H637 | 12-Oct-2026 | 20-Nov-2026 |
| Tractor | 107 / 6P441 | 13-Aug-2026 | 21-Sep-2026 | Trailer | TR-238 / 64C915 | 13-Oct-2026 | 21-Nov-2026 |
| Tractor | 112 / 8M715 | 14-Aug-2026 | 22-Sep-2026 | Trailer | TR-244 / 11D528 | 14-Oct-2026 | 22-Nov-2026 |
| Tractor | 118 / 3R926 | 15-Aug-2026 | 23-Sep-2026 | Trailer | TR-251 / 97K304 | 15-Oct-2026 | 23-Nov-2026 |
| Trailer | TR-221 / 93F672 | 16-Aug-2026 | 24-Sep-2026 | Trailer | TR-263 / 42P861 | 16-Oct-2026 | 24-Nov-2026 |
| Trailer | TR-224 / 18A441 | 17-Aug-2026 | 25-Sep-2026 | Trailer | TR-277 / 16W490 | 17-Oct-2026 | 25-Nov-2026 |
| Trailer | TR-231 / 74N208 | 18-Aug-2026 | 26-Sep-2026 | | | | |