

The other half of the quarter

The sales tax tools

The cardlock tools tell you what came off the racks. These six take that and turn it into a California return that ties.

One taxable figure, three places it has to agree

This is the part that catches people out — and the reason the three pages are one tool, not three.

1

The return produces the taxable figure

Gross sales, plus use tax purchases, less every deduction and adjustment.

2

The local schedule splits it by place of sale

The Bradley-Burns 1.25% follows the jurisdiction the sale happened in. The parts must sum to the whole.

3

The district schedule splits it by district

Each district at its own rate — including the areas with no district tax at all.

4

Everything ties, or the return is wrong

Change one figure on any page and the reconciliation updates, saying how much you are over or short.

!

A return that does not tie is the one that comes back.

That check is the difference between a filing that goes through and one that generates a notice.

California Sales Tax Return

The whole form, not the short one.

Sections A to D

Nontaxable sales and adjustments, then the partial exemptions at 5.00% and 3.9375% — the parts the short form leaves out.

Down to net tax

The additional state tax that puts clear diesel at 13.00%, and the credit block all the way to the figure you pay.

It fills itself

Read in a CDTFA filing record PDF and the return populates from it. Nothing is re-keyed, and the PDF never leaves the browser.



Partial exemption sales are not deducted. They are taxed, then credited.

Deduct them instead and you understate taxable transactions — which breaks both allocation schedules at once. This is the single most common way a fuel jobber return goes wrong.

The two allocation schedules

Same taxable figure, cut two different ways, each tied back to the return.

Local Sales Tax — 1.25%

Bradley-Burns, allocated to the jurisdiction where the sale took place. Split it by place of sale and watch it tie back — or not.

District Tax — on top of 7.25%

Voter-approved add-ons. They vary by district, they expire and they renew, and each district is reported separately at its own rate.

Checked against the published rates

Every row is set against the CDTFA table, which is the difference between the rate you were given and the rate CDTFA published that quarter.



The district schedule is where most jobber errors actually live.

Get the district wrong and you have either overpaid, or created an audit finding. For a cardlock operator the place of sale is a rack, not the office — and the site totals from the cardlock tools arrive already split the way this schedule wants them.

And then you have to file it

Their rates. Their workbooks.

Filled from your figures, rather than typed in by hand — three tools that end at CDTFA's own templates.

District Rates

Every district, with the dates the rate runs between.

1

Scraped from CDTFA Schedule A2

Every district, its STJ code, its rate, and the dates that rate applies between. Searchable, and downloadable as the CSV the office already works from.

2

So you can see which rate applied on any given day

Which matters, because a quarter you are amending is not a quarter at today's rates.

3

Replacing it is deliberately two steps

A new file is parsed, checked and shown as a list of differences before anything is written. A scrape that quietly lost half the districts should never become the live table.

CDTFA District Tax Upload

CDTFA's online return accepts an Excel upload for Schedule A. This fills it.

359

rows in their template, one per district tax area — none of which you have to type

0

jurisdictions quietly dropped. Anything that does not match a CDTFA city code is listed

1

file, edited in place, so their lookups, tables and validation survive the round trip



Their template goes in, and their template comes out.

Not a rebuilt lookalike — the workbook CDTFA published, with your district sales written into it.

CDTFA Monthly Pre-Tax Upload

The motor vehicle fuel pre-collection return, 531-AB.

Schedule A — fuel sold

The gallons you sold with the prepayment collected, out of your own sales spreadsheet and into their template.

Schedule B — fuel bought

The gallons you bought with the prepayment paid, on the same basis, so both directions sit in one workbook.

And then reconciled

Fuel by fuel: bought, sold, and sold exempt. Every gallon has to be accounted for between the two schedules.



Exempt diesel is the gallon people lose.

It leaves the rack, it never appears as a taxable sale, and unless something is explicitly looking for it, it simply goes missing between the two schedules.

What this is, and is not

Worth saying plainly, because these pages look like a filing and are not one.

1

Nothing is submitted

There is no server involved. Anything you type stays in your browser and disappears when you close the tab.

2

Your PDF stays on your computer

A filing record read in is parsed in the browser and never uploaded to us — and so is the Excel workbook that comes back out.

3

Not official, and not tax advice

TaxTraks is not affiliated with CDTFA, the rates on the demonstration pages are examples, and your real filing depends on facts a web page knows nothing about.

Bring us a quarter and we will run it.

On your real numbers. That part is free.

A folder of statements, the monthly schedules and a few nightly files — and we will show you what your quarter actually says, whether the schedules tie back to the return, and whether there is overpaid tax sitting in it.