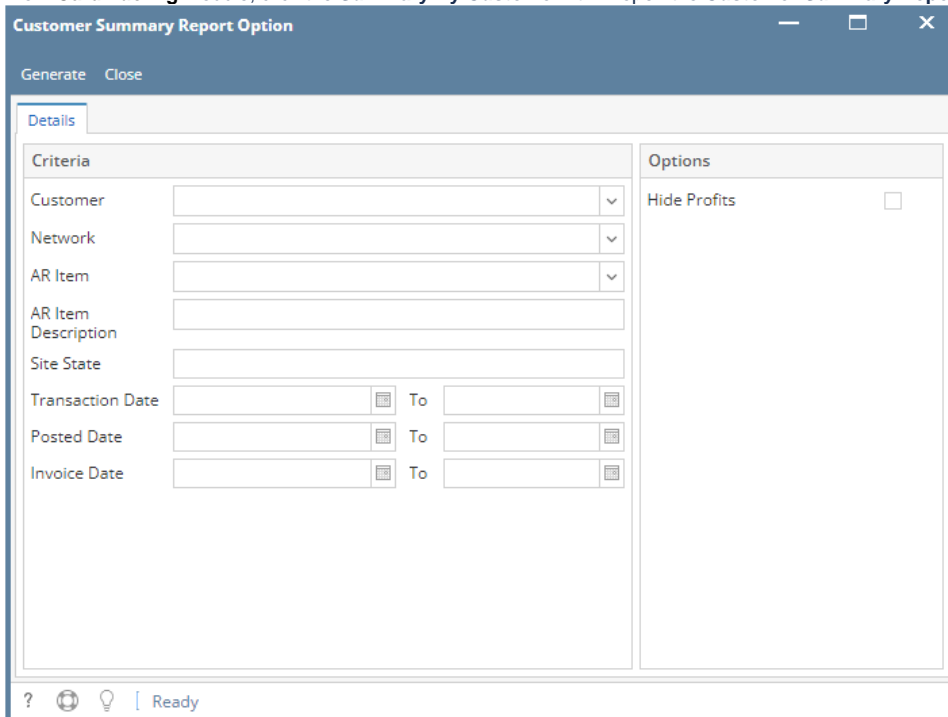


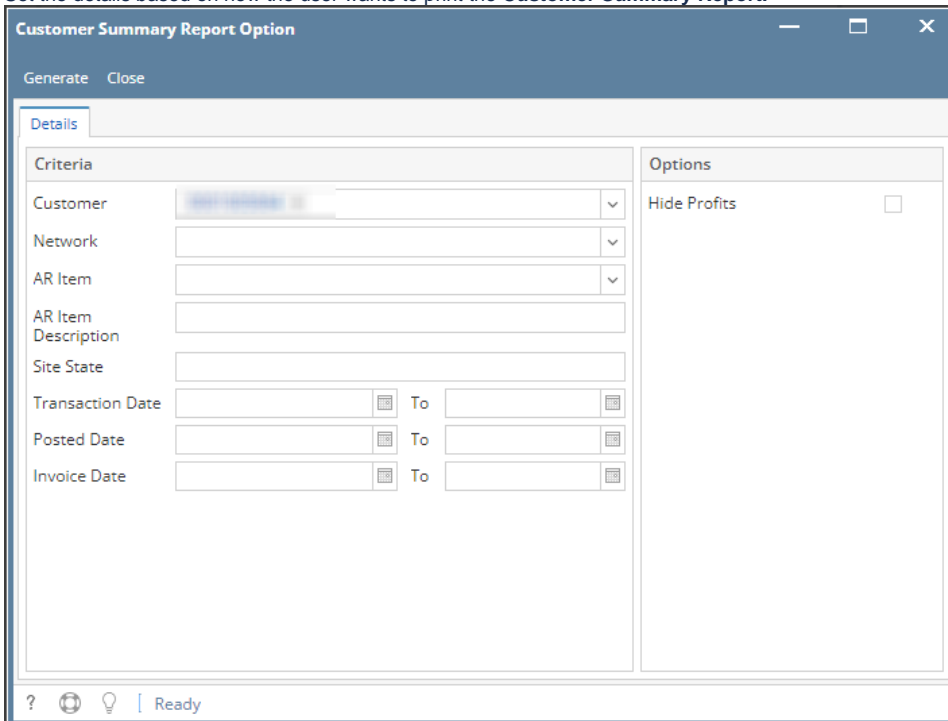
How to Print Summary By Customer Report

1. From **Card Fueling** module, click the **Summary By Customer**. It will open the **Customer Summary Report Option** screen.



The screenshot shows the 'Customer Summary Report Option' window. The title bar includes 'Generate' and 'Close' buttons. The 'Details' tab is active, displaying two main sections: 'Criteria' and 'Options'. The 'Criteria' section contains fields for 'Customer', 'Network', 'AR Item', 'AR Item Description', 'Site State', 'Transaction Date' (with a 'To' field), 'Posted Date' (with a 'To' field), and 'Invoice Date' (with a 'To' field). The 'Options' section has a 'Hide Profits' checkbox. The status bar at the bottom shows a question mark, a globe icon, a lightbulb icon, and the text 'Ready'.

2. Set the details based on how the user wants to print the **Customer Summary Report**.



This screenshot shows the same 'Customer Summary Report Option' window, but with the 'Criteria' fields populated. The 'Customer' field is set to 'Card Fueling', 'Network' is 'Card Fueling', 'AR Item' is 'Card Fueling', 'AR Item Description' is 'Card Fueling', 'Site State' is 'Card Fueling', 'Transaction Date' is '1/1/2020', 'Posted Date' is '1/1/2020', and 'Invoice Date' is '1/1/2020'. The 'Options' section remains unchanged with the 'Hide Profits' checkbox. The status bar at the bottom shows a question mark, a globe icon, a lightbulb icon, and the text 'Ready'.

- Click the **Generate** button. Report will be generated.

Customer Summary Report Option

Generate Close

Details

Criteria

Customer: [Dropdown]
 Network: [Dropdown]
 AR Item: [Dropdown]
 AR Item Description: [Text]
 Site State: [Text]
 Transaction Date: [Date] To [Date]
 Posted Date: [Date] To [Date]
 Invoice Date: [Date] To [Date]

Options

Hide Profits: ☐

? [Icons] Ready

Report Viewer - Transaction Summary By Customer

Print Save

Page 1 of 1

Summary by Customer

06/11/2023

	Quantity	Sales Amt	Cost	GP Amt	Margin	GP %
000L Diesel Diesel	30.000	40.00	42.04	-1.04	-2.60	-2.6
000L Diesel Diesel (No fuel)	30.000	40.00	42.04	-1.04	-2.60	-2.6
Gasoline Gasoline	111.000	880.00	140.25	739.75	8.44	82.0
Gasoline Gasoline	111.000	880.00	140.25	739.75	8.44	82.0
Customer Totals	141.000	920.00	182.29	737.71	8.02	79.0

Grand Total By Transaction Type

	Quantity	Sales Amt	Cost	GP Amt	Margin	GP %
Local/Network Totals	141.000	920.00	182.29	737.71	8.02	79.0

Printed By: [User]
 Date: 06/11/2023 10:10 AM

Filter Name: Conditions From To Operator

Customer: [Text]

On **Report Viewer** screen, click Print icons (for printing current page and for all pages) to produce a hard copy of customer invoices. Click Save icons (for exporting the current page and for all pages) to save a copy to your computer. To select type of copy, select on the drop down (marked).

- There is an additional option in printing this report. The user may checked or unchecked the **Hide Profits** checkbox. If the user will not check it, Profits will be visible in the report.

Customer Summary Report Option

Generate Close

Details

Criteria

Customer

Network

AR Item

AR Item Description

Site State

Transaction Date

Posted Date

Invoice Date

To

To

To

Options

Hide Profits

?

Ready

Report Viewer: Transaction Summary By Customer

Active Close

Page 1 of 1

Print

Summary by Customer

Quantity	Sales Amt	Cost	GP Amt	Margin	GP %
30.000	40.40	42.04	-1.64	-0.05	-3.9
30.000	40.40	42.04	-1.64	-0.05	-3.9
111.000	880.90	148.25	732.65	0.44	52.0
111.000	880.90	148.25	732.65	0.44	52.0
141.000	921.30	190.29	731.01	0.27	73.9

Grand Total By Transaction Type

Quantity	Sales Amt	Cost	GP Amt	Margin	GP %
141.000	921.30	190.29	731.01	0.07	73.9

Printed By: JESSY ADRI

Filter Type

Condition

From

To

Operator

If the user will check it, Profits will be **NOT** visible in the report.

Customer Summary Report Option

Generate Close

Details

Criteria

Customer

Network

AR Item

AR Item Description

Site State

Transaction Date

Posted Date

Invoice Date

To

To

To

Options

Hide Profits

Ready

Report Viewer - Transaction Summary By Customer

Active Close

Page 1 of 1

Print

Summary by Customer

8/23/2023

	Quantity	Sales Amt
000L Dyed Diesel	30.000	62.40
000L Diesel (no sulfur)	30.000	62.40
000L Toluene	111.000	889.90
Gasoline Gasoline	111.000	889.90
870-7796 87 Unleaded Gasoline 7786	111.000	889.90
Customer Totals	141.000	910.40

Grand Total By Transaction Type

Local/Network Totals	Quantity	Sales Amt	GP Amt	Margin	GP %
Local/Network Totals	141.000	910.40	716.10	1.07	78.6

Printed By: BILLY ADJESY

Date Created: 23/08/2023 3:19 pm

File Name	Condition	Free	By	Operator
Customer Transfer	BT			ATD