

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.

Customer Summary Report Option

GenerateClose

Details

Criteria

Customer

Network

AR Item

AR Item Description

Site State

Transaction Date

To

Posted Date

To

Invoice Date

To

Options

Hide Profits

?

Ready

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

Customer Summary Report Option

GenerateClose

Details

Criteria

Customer

00000000000000000000

Network

AR Item

AR Item Description

Site State

Transaction Date

To

Posted Date

To

Invoice Date

To

Options

Hide Profits

?

Ready

3. 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

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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 |
| 000L Diesel Diesel | 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]
Base Control: [User]

| Filter Name | Condition | From | To | Operator |
|-------------------|-----------|------|----|----------|
| Customer Transfer | ST | | | AND |

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).

4. 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

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 | -0.95 | -3.9 |
| 30.000 | 40.40 | 42.04 | -1.64 | -0.95 | -3.9 |
| 111.000 | 889.90 | 148.25 | 720.75 | 6.44 | 62.0 |
| 111.000 | 889.90 | 148.25 | 720.75 | 6.44 | 62.0 |
| 141.000 | 930.30 | 190.29 | 739.99 | 6.27 | 79.0 |

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

