

# How to Print Summary By Site Report

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

The screenshot shows the 'Site Summary Report Option' window. It has a title bar with standard window controls. Below the title bar are 'Generate' and 'Close' buttons. The main area is divided into two panels: 'Criteria' on the left and 'Options' on the right. The 'Criteria' panel contains several input fields: 'Network' (dropdown), 'Site' (dropdown), 'Transaction Type' (dropdown), 'AR Item' (dropdown), 'AR Item Description' (text area), 'Site State' (text field), 'Transaction Date' (date range), 'Posted Date' (date range), 'Invoice Date' (date range), and 'Invoiced' (dropdown set to 'Include'). The 'Options' panel contains a list of checkboxes: 'Original Network Cost', 'Summary Totals Only', 'Category Totals' (checked), 'Product Summary' (checked), 'Type/Product Summary' (checked), 'Type/Category Summary' (checked), 'Category/Type Summary' (checked), and 'Breakout Taxes' (checked). At the bottom of the window is a status bar with icons for help, search, and a 'Ready' indicator.

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

This screenshot shows the same 'Site Summary Report Option' window, but with the 'Criteria' panel filled out. The 'Network' dropdown is set to 'CFN', 'Transaction Type' is set to 'Local/Network', and 'Invoiced' is set to 'Include'. The 'Options' panel remains the same as in the previous screenshot, with 'Category Totals', 'Product Summary', 'Type/Product Summary', 'Type/Category Summary', 'Category/Type Summary', and 'Breakout Taxes' all checked. The status bar at the bottom still shows the 'Ready' indicator.

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

Site Summary Report Option

Generate

Close

Details

Criteria	Options
Network <input type="text" value="CFN"/>	Original Network Cost <input type="checkbox"/>
Site <input type="text"/>	Summary Totals Only <input type="checkbox"/>
Transaction Type <input type="text" value="Local/Network"/>	Category Totals <input checked="" type="checkbox"/>
AR Item <input type="text"/>	Product Summary <input checked="" type="checkbox"/>
AR Item Description <input type="text"/>	Type/Product Summary <input checked="" type="checkbox"/>
Site State <input type="text"/>	Type/Category Summary <input checked="" type="checkbox"/>
Transaction Date <input type="text"/> To <input type="text"/>	Category/Type Summary <input checked="" type="checkbox"/>
Posted Date <input type="text"/> To <input type="text"/>	Breakout Taxes <input checked="" type="checkbox"/>
Invoice Date <input type="text"/> To <input type="text"/>	
Invoiced <input type="text" value="Include"/>	

?

| Ready

**Report Viewer - Transaction Summary By Site**

Archive Close

Summary by Site

iRely LLC

ABC - ABC - LocalNetwork		Quantity	Sales Amt	Cost	GP Amt	GP %	GP/Dist
DDSL	DDSL - #2 Dyed Diesel (low sulfur)	30.0000	40.48	42.64	-1.56	-3.9	-0.05
ABC - ABC - LocalNetwork	DDSL Totals ...	30.0000	40.48	42.64	-1.56	-3.9	-0.05
	Site Totals ...	30.0000	40.48	42.64	-1.56	-3.9	-0.05

  

		Tax Details		FET	SET	SST	Locate	Gross Amount
Item	Description	Quantity	Net Amount	0.000000	0.000000	0.000000	0.000000	2.000000
DDSL	#2 Dyed Diesel (low sulfur)	30.000000	2.000000					

  

Grand Total By Transaction Type							
Quantity	Sales Amt	Cost	GP Amt	Margin	GP %		
LocalNetwork Totals ...	30.0000	40.48	42.64	-1.56	-0.05	-3.9	

  

Grand Totals By Product							
Quantity	Sales Amt	Cost	GP Amt	GP %	GP/Dist		
DDSL - #2 Dyed Diesel (low sulfur) ...	30.0000	40.48	42.64	-1.56	-3.9	-0.05	

  

Grand Totals By Transaction Type/Product							
Quantity	Sales Amt	Cost	GP Amt	GP %	GP/Dist		
LocalNetwork	DDSL - #2 Dyed Diesel (low sulfur) ...	30.0000	40.48	42.64	-1.56	-3.9	-0.05

  

Grand Totals By Transaction Type/Category							
Quantity	Sales Amt	Cost	GP Amt	GP %	GP/Dist		
LocalNetwork	DDSL - Dyed Diesel	30.0000	40.48	42.64	-1.56	-3.9	-0.05
Total: LocalNetwork		30.0000	40.48	42.64	-1.56	-3.9	-0.05

  

Grand Totals By Category/Transaction Type							
Quantity	Sales Amt	Cost	GP Amt	GP %	GP/Dist		
DDSL - Dyed Diesel	LocalNetwork	30.0000	40.48	42.64	-1.56	-3.9	-0.05
Total: DDSL - Dyed Diesel		30.0000	40.48	42.64	-1.56	-3.9	-0.05

  

		Tax Details		FET	SET	SST	Locate	Gross Amount
Item	Description	Quantity	Net Amount	0.000000	0.000000	0.000000	0.000000	2.000000
DDSL	#2 Dyed Diesel (low sulfur)	30.000000	2.000000					

  

Printed By: BIELZ,ADN@iRely.com Date Created: 09/20/2023 1:47 pm

File Name	Credentia	Form	Operation
Site Number	IN	FFM	AUD
Terminal	IN	CPH	AUD
Transaction Type	IN	LocalNetwork	AUD

Activate Windows  
Go to Settings to activate Windows.

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. User may mix and match the **Options** Panel. They may checked or unchecked some factors on how they want to print the report. If the user will check the **"Summary Totals Only"** as well as **"Category Totals"**, **"Summary Totals Only"** will only be considered. **"Category Totals"** will not display.

Report Viewer - Transaction Summary By Site

Active Code

Summary by Site

Grand Total By Transaction Type

	Quantity	Sales Amt	Cost	GP Amt	Margin	GP %
LocalNetwork Totals ...	30,000	40.48	42.04	1.56	-0.55	-3.9

Grand Totals By Product

	Quantity	Sales Amt	Cost	GP Amt	GP %	GP/Unit
DOD - D2 Dyed Diesel (low sulfur) ...	30,000	40.48	42.04	1.56	-3.9	-0.05

Grand Totals By Transaction Type/Product

	Quantity	Sales Amt	Cost	GP Amt	GP %	GP/Unit
LocalNetwork DOD - D2 Dyed Diesel (low sulfur) ...	30,000	40.48	42.04	1.56	-3.9	-0.05

Grand Totals By Transaction Type/Category

	Quantity	Sales Amt	Cost	GP Amt	GP %	GP/Unit
LocalNetwork DDSL - Dyed Diesel	30,000	40.48	42.04	1.56	-3.9	-0.05
Total LocalNetwork	30,000	40.48	42.04	1.56	-3.9	-0.05

Grand Totals By Category/Transaction Type

	Quantity	Sales Amt	Cost	GP Amt	GP %	GP/Unit
DDSL - Dyed Diesel LocalNetwork	30,000	40.48	42.04	1.56	-3.9	-0.05
Total DDSL - Dyed Diesel	30,000	40.48	42.04	1.56	-3.9	-0.05

Tax Details

Item	Description	Quantity	Net Amount	FET	SET	SST	Locale	Gross Amount
DSD	42 Dyed Diesel (low sulfur)	30,000.00	2,000.00	0.000000	0.000000	0.000000	0.000000	2,000.00

Printed On: SHELBY ANDREWS Date Created: 22/06/2023 4:57 pm

File Name	Criterion	From	To	Operator
No Trailer	IS			AND
Detours	IS	CPG		AND
Transaction Type	IS	Local Network		AND

If the user will check the "**Category Totals**", the report will display as follows.

Site Summary Report Option

Generate

Close

Details

Criteria

Network

CFN

Site

Transaction Type

Local/Network

AR Item

AR Item Description

Site State

Transaction Date

To

Posted Date

To

Invoice Date

To

Invoiced

Include

Options

Original Network Cost

Summary Totals Only

Category Totals

Product Summary

Type/Product Summary

Type/Category Summary

Category/Type Summary

Breakout Taxes

Report Viewer - Transaction Summary By Site

Summary By Site

iRelly LLC

ABC - ABC - LocalNetwork	Quantity	Sales Amt	Cost	GP Amt	GP %	GP Unit
DDSL - D2D - #2 Dyed Diesel (low sulfur)	38.0000	80.48	42.04	-1.56	-3.9	-0.05
<b>DDSL Totals</b>	<b>38.0000</b>	<b>80.48</b>	<b>42.04</b>	<b>-1.56</b>	<b>-3.9</b>	<b>-0.05</b>
ABC - ABC - LocalNetwork	38.0000	80.48	42.04	-1.56	-3.9	-0.05
<b>Site Totals</b>	<b>76.0000</b>	<b>160.96</b>	<b>84.08</b>	<b>-3.12</b>	<b>-7.8</b>	<b>-0.10</b>

Item	Description	Quantity	Net Amount	FET	SET	SST	Locate	Gross Amount
DDSL	#2 Dyed Diesel (low sulfur)	38.000000	-2.650000	0.000000	0.000000	0.000000	0.000000	2.650000

Grand Total By Transaction Type						
	Quantity	Sales Amt	Cost	GP Amt	Margin	GP %
LocalNetwork Totals	38.0000	80.48	42.04	-1.56	-0.05	-3.9

Grand Totals By Product						
	Quantity	Sales Amt	Cost	GP Amt	GP %	GP Unit
D2D - #2 Dyed Diesel (low sulfur)	38.0000	80.48	42.04	-1.56	-3.9	-0.05

Grand Totals By Transaction Type/Product						
	Quantity	Sales Amt	Cost	GP Amt	GP %	GP Unit
LocalNetwork - D2D - #2 Dyed Diesel (low sulfur)	38.0000	80.48	42.04	-1.56	-3.9	-0.05

Grand Totals By Transaction Type/Category						
	Quantity	Sales Amt	Cost	GP Amt	GP %	GP Unit
LocalNetwork - DDSL - Dyed Diesel	38.0000	80.48	42.04	-1.56	-3.9	-0.05
<b>Total: LocalNetwork</b>	<b>38.0000</b>	<b>80.48</b>	<b>42.04</b>	<b>-1.56</b>	<b>-3.9</b>	<b>-0.05</b>

Grand Totals By Category/Transaction Type						
	Quantity	Sales Amt	Cost	GP Amt	GP %	GP Unit
DDSL - Dyed Diesel - LocalNetwork	38.0000	80.48	42.04	-1.56	-3.9	-0.05
<b>Total: DDSL - Dyed Diesel</b>	<b>38.0000</b>	<b>80.48</b>	<b>42.04</b>	<b>-1.56</b>	<b>-3.9</b>	<b>-0.05</b>

Item	Description	Quantity	Net Amount	FET	SET	SST	Locate	Gross Amount
DDSL	#2 Dyed Diesel (low sulfur)	38.000000	-2.650000	0.000000	0.000000	0.000000	0.000000	2.650000

Printed By:	SLT1111201201	Doc Created:	11/19/2012	8:47 pm
Filter Name	Credited	From	To	Operator
Site Number	01			AJD
System	CFD			AJD
Transaction Type	ST	LocalNetwork		AJD

For the other **options**, they will not affect each other. They can be selected simultaneously. **"Grand Total By Transaction Type"** is a default and always visible in the report.

# Site Summary Report Option

Generate Close

## Details

### Criteria

Network: CFN ×

Site:

Transaction Type: Local/Network ×

AR Item:

AR Item Description:

Site State:

Transaction Date:  To

Posted Date:  To

Invoice Date:  To

Invoiced: Include ▼

### Options

- Original Network Cost ☐
- Summary Totals Only ☐
- Category Totals ☒
- Product Summary ☒
- Type/Product Summary ☒
- Type/Category Summary ☒
- Category/Type Summary ☒
- Breakout Taxes ☒

## Report Viewer - Transaction Summary By Site

Archive Close

Activate Windows

Go to settings to activate Windows

