

How to print Taxes by Site/Customer

1. From **Card Fueling** module, click **Taxes by Site/Customer**. It will open the Taxes by Site/Customer Report Option screen.

Taxes by Site/Customer Report Option

GenerateClose

Details

Criteria

Network

Site State

Site Number

Site Group

Transaction Type

Category

Tax Class

Transaction Date

To

Posted Date

To

Options

Sorting Options

Site

Show Tax

Both

Include Transaction Detail

?

Ready

2. Enter the Detail's Criteria and Option then click Generate button

Taxes by Site/Customer Report Option

GenerateClose

Details

Criteria

Network

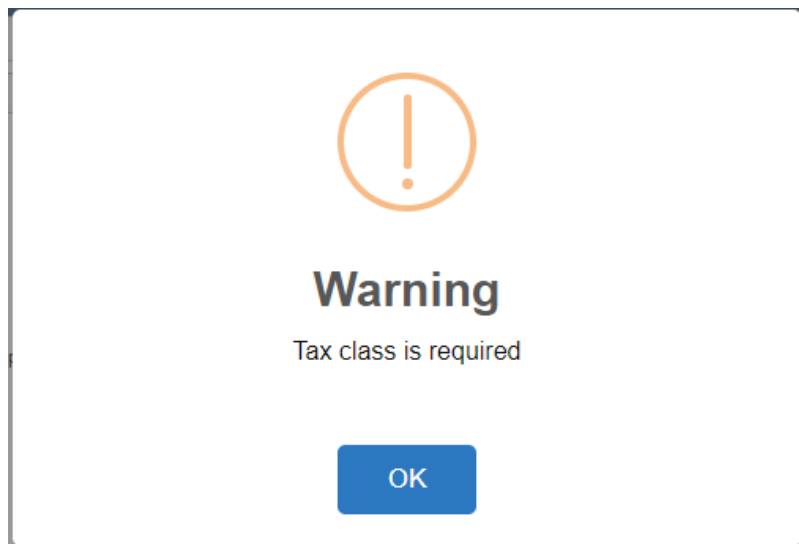
Options

Sorting Options

Site

Note: On Criteria panel, **Tax Class** is required to generate **Report Viewer - Summary Tax Report**

- When Tax Class was not filled out this message will display:



On Option Panel, Report Heading display can be modified base on the selected option.

- When Sort Order = Customer, Tax ID field will be enabled.

Options	
Sorting Options	<div>Customer</div> <div>▼</div>
Show Tax	<div>Both</div> <div>▼</div>
Tax Id	<div>Federal</div> <div>▼</div>
Include Transaction Detail	<input type="checkbox"/>

- When Sort Order = Customer and Include Transaction Details = False
 - Hide Date and Site headings
 - 'Customer Info' label is indicated for each line of customer

Report Viewer - Summary Tax Report

Archive Close

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Tax Summary

State Excise Tax (SET) Diesel - Both

04/28/2021

	Quantity	Tax Rate	Total Sales	Tax Collected	Tax Exempted
Customer info:					
Total : D2C #2 Clear Diesel (Low Sulfur)	349.790000		813.95	59.36	0.00
Total:	349.790000		813.95	59.36	0.00
Customer info:					
Total : D2C #2 Clear Diesel (Low Sulfur)	96.000000		370.96	34.56	0.00
Total:	96.000000		370.96	34.56	0.00
Customer info:					
Total : 87G 87 Unleaded Gasoline	15.500000		34.08	0.00	4.65
Total : D2C #2 Clear Diesel (Low Sulfur)	15.800000		0.00	4.74	0.00
Total:	31.300000		34.08	4.74	4.65
Customer info:					
Total : D2C #2 Clear Diesel (Low Sulfur)	35.250000		75.92	0.00	11.19
Total:	35.250000		75.92	0.00	11.19

Ready Refresh

- When Sort Order = Customer and Include Transaction Details = True
 - Show Date and Site Headings
 - Customer line is labeled

Report Viewer - Summary Tax Report

Archive Close

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Tax Summary

State Excise Tax (SET) Diesel - Both

04/28/2021

Date	Site	Product	Quantity	Tax Rate	Total Sales	Tax Collected	Tax Exempted
Customer info:							
2016-10-02 03:57	ABC Fort Wayne - Hobson Rd, 4242 Flagstaff Cv , Fort Wayne, IN	D2C #2 Clear Diesel (Low	18.200000	0.160000	40.39	2.91	0.00
2016-10-07 03:58	ABC Fort Wayne - Hobson Rd, 4242 Flagstaff Cv , Fort Wayne, IN	D2C #2 Clear Diesel (Low	29.070000	0.160000	65.67	4.65	0.00
2016-10-08 04:00	ABC Fort Wayne - Hobson Rd, 4242 Flagstaff Cv , Fort Wayne, IN	D2C #2 Clear Diesel (Low	39.990000	0.160000	91.94	6.40	0.00
2016-10-14 04:01	ABC Fort Wayne - Hobson Rd, 4242 Flagstaff Cv , Fort Wayne, IN	D2C #2 Clear Diesel (Low	40.210000	0.160000	95.26	6.43	0.00
2016-10-15 04:02	ABC Fort Wayne - Hobson Rd, 4242 Flagstaff Cv , Fort Wayne, IN	D2C #2 Clear Diesel (Low	13.710000	0.160000	32.48	2.19	0.00
2016-10-15 04:04	ABC Fort Wayne - Hobson Rd, 4242 Flagstaff Cv , Fort Wayne, IN	D2C #2 Clear Diesel (Low	38.610000	0.160000	91.47	6.18	0.00
2016-10-16 04:06	ABC Fort Wayne - Hobson Rd, 4242 Flagstaff Cv , Fort Wayne, IN	D2C #2 Clear Diesel (Low	11.300000	0.160000	26.66	1.81	0.00
2016-10-21 04:07	ABC Fort Wayne - Hobson Rd, 4242 Flagstaff Cv , Fort Wayne, IN	D2C #2 Clear Diesel (Low	39.150000	0.160000	92.75	6.26	0.00
2016-10-22 04:08	ABC Fort Wayne - Hobson Rd, 4242 Flagstaff Cv , Fort Wayne, IN	D2C #2 Clear Diesel (Low	42.130000	0.160000	99.38	6.74	0.00
2016-10-30 04:09	ABC Fort Wayne - Hobson Rd, 4242 Flagstaff Cv , Fort Wayne, IN	D2C #2 Clear Diesel (Low	39.110000	0.160000	89.91	6.26	0.00
2016-10-30 04:10	ABC Fort Wayne - Hobson Rd, 4242 Flagstaff Cv , Fort Wayne, IN	D2C #2 Clear Diesel (Low	14.010000	0.160000	32.63	2.24	0.00
2017-10-01 08:44	AVI Bend-OR, , ,	D2C #2 Clear Diesel (Low	24.300000	0.300000	55.42	7.29	0.00
Total : D2C #2 Clear Diesel (Low Sulfur)			349.790000		813.95	59.36	0.00

Ready Refresh

- When Sort Order = Site and Include Transaction Details = False
 - Hide Date and Customer Headings
 - Site Detail is labeled

Report Viewer - Summary Tax Report

Archive Close

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Tax Summary

State Excise Tax (SET) Diesel - Both

04/28/2021

	Quantity	Tax Rate	Total Sales	Tax Collected	Tax Exempted
Site info: PacPride					
Total : D2C #2 Clear Diesel (Low Sulfur)	96.000000	149.160000	370.96	34.56	0.00
Total: 96.000000	96.000000	149.160000	370.96	34.56	0.00
Site info: PacPride					
Total : D2C #2 Clear Diesel (Low Sulfur)	325.490000	32.629290	758.53	52.07	0.00
Total: 325.490000	325.490000	32.629290	758.53	52.07	0.00
Site info: PacPride					
Total : 87G 87 Unleaded Gasoline	15.500000	34.080000	34.08	0.00	4.65
Total : D2C #2 Clear Diesel (Low Sulfur)	24.300000	55.420000	55.42	7.29	0.00
Total: 39.800000	39.800000	55.420000	89.50	7.29	4.65
Site info: PacPride					
Total : D2C #2 Clear Diesel (Low Sulfur)	35.250000	34.940000	75.92	0.00	11.19
Total: 35.250000	35.250000	34.940000	75.92	0.00	11.19

Ready Refresh

- When Sort Order = Site and Include Transaction Details = True
 - Show Date and Customer Headings
 - Site details is labeled

Report Viewer - Summary Tax Report

Archive Close

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Tax Summary State Excise Tax (SET) Diesel - Both

04/29/2021

Date	Customer	Product	Quantity	Tax Rate	Total Sales	Tax Collected	Tax Exempted
Site info: PacPride							
2018-10-22 19:51		D2C #2 Clear Diesel (Low	57.400000	0.360000	221.80	20.66	0.00
2018-10-22 19:51		D2C #2 Clear Diesel (Low	38.600000	0.360000	149.16	13.90	0.00
Total : D2C #2 Clear Diesel (Low Sulfur)			96.000000	149.160000	370.96	34.56	0.00
Total:			96.000000	149.160000	370.96	34.56	0.00

Site info: PacPride							
2016-10-02 03:57		D2C #2 Clear Diesel (Low	18.200000	0.160000	40.39	2.91	0.00
2016-10-07 03:58		D2C #2 Clear Diesel (Low	29.070000	0.160000	65.67	4.65	0.00
2016-10-08 04:00		D2C #2 Clear Diesel (Low	39.990000	0.160000	91.94	6.40	0.00
2016-10-14 04:01		D2C #2 Clear Diesel (Low	40.210000	0.160000	95.26	6.43	0.00
2016-10-15 04:02		D2C #2 Clear Diesel (Low	13.710000	0.160000	32.48	2.19	0.00
2016-10-15 04:04		D2C #2 Clear Diesel (Low	38.610000	0.160000	91.47	6.18	0.00
2016-10-16 04:06		D2C #2 Clear Diesel (Low	11.300000	0.160000	26.66	1.81	0.00
2016-10-21 04:07		D2C #2 Clear Diesel (Low	39.150000	0.160000	92.75	6.26	0.00
2016-10-22 04:08		D2C #2 Clear Diesel (Low	42.130000	0.160000	99.38	6.74	0.00
2016-10-30 04:09		D2C #2 Clear Diesel (Low	39.110000	0.160000	89.91	6.26	0.00

? Ready

Refresh