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.
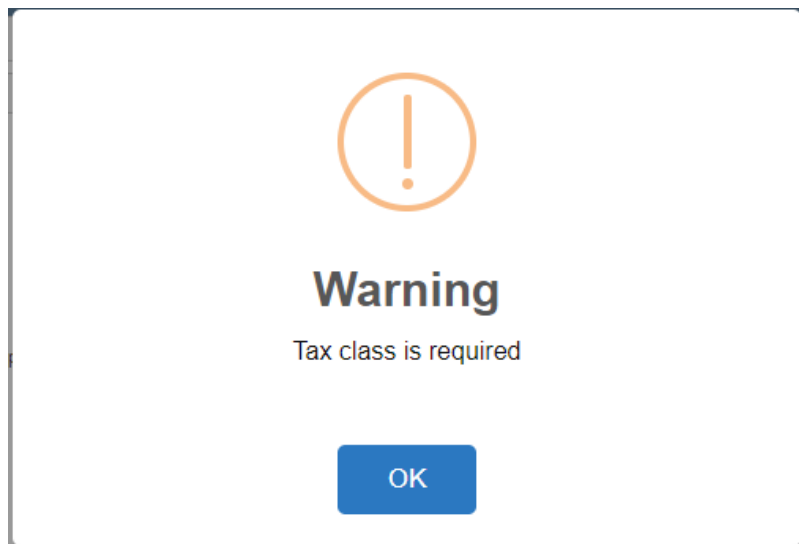

2. Enter the Detail's Criteria and Option then click Generate button

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:

Warning

Tax class is required

OK

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	Customer	⌄
Show Tax	Both	⌄
Tax Id	Federal	⌄
Include Transaction Detail	☐

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

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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

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

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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

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

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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	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	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	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	34.940000	75.92	0.00	11.19

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

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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

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