# AvaTax for Communications

# Custom Sort Utility User Manual

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## Document Revision History

The Revision History log lists the date and description of the most recent revisions or versions of the document.

| Date | Version | Description |
|------|---------|-------------|
| 03/02/2016 | 0003 | Avalara branding updates to reflect the transition to the new company and product names have been incorporated into this document. Please see **Appendix B – Avalara Product Names** for specific changes in product references and descriptions. |
| 04/05/2016 | 0004 | Updates and additions in **Section 1.1 AFC License** and **Section 1.2 AFC SaaS Standard** to address use of the Custom Sort Utility. |
| 04/25/2016 | 0005 | Update to table in **Section 2.2 Configuration Fields for Sorting/Reporting.** Added descriptions for values TAX_TYPE_DESC, TAX_CAT and TAX_CAT_DESC to table. |
| 05/13/2016 | 0006 | Inserted new **Section 1.3 AFC SaaS Pro** related to custom reports. |
| 06/24/2016 | 0007 | Updated **Section 1.1.2 Arguments** and **Section 1.1.3 Examples** with custom sort option details. |
| 02/23/2017 | 0008 | Updated tax category values and descriptions in table of **Section 2.2**. |
| 07/27/2017 | 0009 | Added note related to log file path in **Section 1.1.2 Arguments**. |
| 10/25/2017 | 0010 | Updated Avalara contact information (address and support site). Removed **Appendix B – Avalara Product Names**. |

# Table of Contents

# 1. Overview

The Custom Sort Utility is designed to allow clients to produce taxation reports which are sorted and summarized using client-specified fields and/or options. The utility is restricted to fields available in the AvaTax for Communications (AFC) transaction log, which can be affected by configuration settings in the EZtax.cfg.

This utility uses the AvaTax for Communications (AFC) API library.

## 1.1  AFC License

### 1.1.1  Command Line Usage

customsort -cfg customsort.cfg [-log logfile] [-data datapath] [-work workpath] [-ext extension] [-?]

### 1.1.2  Arguments

-cfg customsort.cfg       : Required.  Custom sort configuration to be used.

-log logfile*       : EZTax log file to be processed (DEF: EZTax.log).

           *The full path for the log file must be specified.*

-data <path>       : Data directory; overrides config file value.

-work <path>       : Working directory; overrides config file value.

-ext <ext>       : Result file extension without '.'; overrides reserved config file extension.

-summarize <sumfile>       : Log file is summarized into sumfile.  On large log files, this option can substantially speed up the sorting process.

-out <fname>       : Output base filename; overrides config file.  This option can be used when there is a need to set the output files from a script so that different sorts can share the same configuration file.

-?       : Display usage and exit

### 1.1.3  Examples

customsort -cfg customsort.cfg

customsort -cfg customsort.cfg -log mylogfile.log

customsort -cfg customsort.cfg -log mylogfile.log -data path/to/data

customsort -cfg customsort.cfg -log mylogfile.log -work path/to/workingdirectory

customsort -cfg customsort.cfg -log mylogfile.log -ext csv

customsort -cfg customsort.cfg -log mylogfile.log -summarize quicksort.log

customsort -cfg customsort.cfg -log mylogfile.log -out mysort


### 1.1.4    Output (in working directory)

Taxation Reports        - Sorted and summarized taxation reports per configuration options

Metrics Report          - Custom sort processing metrics

Status file             - Processing status and any errors that might have occurred


## 1.2    AFC SaaS Standard

### 1.2.1    Usage

The Custom Sort Utility can be called in AFC SaaS Standard to allow clients to produce taxation reports which are sorted and summarized using client-specified fields and/or options based on the transactions contained within the ftp.zip input file.  The resulting report is a CSV file that can then be opened and edited within a spreadsheet program such as Microsoft Excel.  In order for the custom sort feature to be applied, a configuration file – customsort.cfg – must be either be persisted in your account or embedded in the input zip file (ftp.zip) along with the transaction input file in the Extended AFC SaaS Standard format.

To make the Custom Sort Config file a persisted file, please contact communicationsupport@avalara.com for further assistance.  Persisting the file is the preferred method of generating the Custom Sort report.

To embed the Custom Sort Config file, place the customsort.cfg file into the ftp.zip file along with an Extended Format input file.


### 1.2.2    AFC SaaS Standard Custom Sort Example

### 1.2.2.1 Sample customsort.cfg file

```
////////////////////////////////////////////////////////////////////////
////  ext_srtcomma20l.cfg  ////
OUTPUT_FILENAME_FORMAT: EZtax_{%y%m%d}
```

```
BASE: srtcomma20l
FIELD: P_CODE
FIELD: CUST_NO
FIELD: INV_NO
OPTION: NBA_FILE
OPTION: NCA_FILE
OPTION: NO_DELETE_LOG
OPTION: HEADER
CALCULATED_VALUE_PRECISION: 6
DEFAULT_EXT: csv
DELIMITER: ','
```

### 1.2.2.2  Sample input file with the base name KML150117AA.csv

| Request Type | Date | BillTo Country ISO | BillTo State | BillTo County | BillTo Locality | BillTo ZipCode | Charge | Transaction Type | Service Type | Customer Number | Invoice Number |
|---|---|---|---|---|---|---|---|---|---|---|---|
| CalcTaxes | 20160315 | USA | FL | Brevard | Cocoa Beach | 32931 | 50 | 19 | 6 | Customer 1 | 987654 |
| CalcTaxes | 20160315 | USA | FL | Brevard | Cocoa Beach | 32931 | 15 | 19 | 50 | Customer 1 | 123456 |
| CalcTaxes | 20160315 | USA | CA | San Francisco | San Francisco | 94102 | 50 | 13 | 6 | Customer 2 | 4567890 |
| CalcTaxes | 20160315 | USA | CA | San Francisco | San Francisco | 94102 | 15 | 13 | 50 | Customer 2 | 4567890 |
| CalcTaxes | 20160315 | USA | NY | New York | New York | 10001 | 50 | 16 | 6 | Customer 3 | 1234 |
| CalcTaxes | 20160315 | USA | NY | New York | New York | 10001 | 25 | 16 | 36 | Customer 3 | 5678 |

### 1.2.2.3  Output Files

**EZtax_160405.rpt**

```
Custom Sort Processing Metrics
--------------------------------------------------------------------------------
  Start Time : Tue Apr 05 10:53:57 2016
  End Time   : Tue Apr 05 10:53:57 2016

Taxes Input Metrics
--------------------------------------------------------------------------------
  Records: 22  File: C:\BILLSOFTONLINE\KML\KML\EZTax\EZTax.log

Taxes Output Metrics
--------------------------------------------------------------------------------
  Summarized Records      :    19  File: EZtax_160405_ssf.csv
  Non-billable Records    :     3  File: EZtax_160405_nba.csv
  Non-compliance Records  :     0  File: EZtax_160405_nca.csv
  Total Summarized Records :   22
--------------------------------------------------------------------------------
End of Report
```

**EZtax_160405_nca.csv**

| Country | State | County | Locality | TaxType | TaxLvl | TaxRate | TaxAmount | SaleAmt | ExemptAmt | AdjustmentAmt | NetTaxable | Minutes | Lines | PCode | CustNo | InvoiceNo |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

EZtax_160405_nba.csv

| Country | State | County | Locality | TaxType | TaxLvl | TaxRate | TaxAmount | SaleAmt | ExemptAmt | AdjustmentAmt | NetTaxable | Minutes | Lines | PCode | CustNo | InvoiceNo |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| USA | | | | 232 | 0 | 0.01635 | 0.303293 | 50 | 31.45 | 0 | 18.55 | 0 | 0 | 0 | Customer 2 | 4567890 |
| USA | | | | 235 | 0 | 0.01635 | 0.159167 | 15 | 5.265 | 0 | 9.735 | 0 | 0 | 0 | Customer 1 | 123456 |
| USA | | | | 235 | 0 | 0.01635 | 0.530558 | 50 | 17.55 | 0 | 32.45 | 0 | 0 | 0 | Customer 1 | 987654 |

EZtax_160405_ssf.csv

| Country | State | County | Locality | TaxType | TaxLvl | TaxRate | TaxAmount | SaleAmt | ExemptAmt | AdjustmentAmt | NetTaxable | Minutes | Lines | PCode | CustNo | InvoiceNo |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| USA | | | | 55 | 0 | 0.182 | 3.3761 | 50 | 31.45 | 0 | 18.55 | 0 | 0 | 0 | Customer 2 | 4567890 |
| USA | | | | 72 | 0 | 0.08 | 0.08 | 50 | 0 | 0 | 50 | 0 | 0 | 0 | Customer 3 | 1234 |
| USA | | | | 162 | 0 | 0.182 | 1.77177 | 15 | 5.265 | 0 | 9.735 | 0 | 0 | 0 | Customer 1 | 123456 |
| USA | | | | 162 | 0 | 0.182 | 5.9059 | 50 | 17.55 | 0 | 32.45 | 0 | 0 | 0 | Customer 1 | 987654 |
| USA | | | | 170 | 0 | 0.014167 | 0.014167 | 50 | 0 | 0 | 50 | 0 | 0 | 0 | Customer 2 | 4567890 |
| USA | | | | 226 | 0 | 0.00331 | 0.032223 | 15 | 5.265 | 0 | 9.735 | 0 | 0 | 0 | Customer 1 | 123456 |
| USA | | | | 226 | 0 | 0.00331 | 0.10741 | 50 | 17.55 | 0 | 32.45 | 0 | 0 | 0 | Customer 1 | 987654 |
| USA | FL | BREVARD | | 64 | 1 | 0.0492 | 0 | 15 | 15 | 0 | 0 | 0 | 0 | 539600 | Customer 1 | 123456 |
| USA | FL | BREVARD | | 64 | 1 | 0.0492 | 0 | 50 | 50 | 0 | 0 | 0 | 0 | 539600 | Customer 1 | 987654 |
| USA | FL | BREVARD | COCOA BEACH | 14 | 1 | 0.0237 | 0.398255 | 16.803993 | 0 | 0 | 16.803993 | 0 | 0 | 540000 | Customer 1 | 123456 |
| USA | FL | BREVARD | COCOA BEACH | 14 | 1 | 0.0237 | 1.327515 | 56.013309 | 0 | 0 | 56.013309 | 0 | 0 | 540000 | Customer 1 | 987654 |
| USA | FL | BREVARD | COCOA BEACH | 64 | 3 | 0.0552 | 0 | 15 | 15 | 0 | 0 | 0 | 0 | 540000 | Customer 1 | 123456 |
| USA | FL | BREVARD | COCOA BEACH | 64 | 3 | 0.0552 | 0 | 50 | 50 | 0 | 0 | 0 | 0 | 540000 | Customer 1 | 987654 |
| USA | FL | BREVARD | COCOA BEACH | 160 | 1 | 0.0015 | 0.025206 | 16.803993 | 0 | 0 | 16.803993 | 0 | 0 | 540000 | Customer 1 | 123456 |
| USA | FL | BREVARD | COCOA BEACH | 160 | 1 | 0.0015 | 0.08402 | 56.013309 | 0 | 0 | 56.013309 | 0 | 0 | 540000 | Customer 1 | 987654 |
| USA | NY | | | 180 | 1 | 0.000975 | 0.048828 | 50.08 | 0 | 0 | 50.08 | 0 | 0 | 2502500 | Customer 3 | 1234 |
| USA | NY | | | 180 | 1 | 0.000975 | 0.024375 | 25 | 0 | 0 | 25 | 0 | 0 | 2502500 | Customer 3 | 5678 |
| USA | NY | NEW YORK | NEW YORK | 73 | 3 | 0.049025 | 2.58154 | 52.657618 | 0 | 0 | 52.657618 | 0 | 0 | 2604100 | Customer 3 | 1234 |
| USA | NY | NEW YORK | NEW YORK | 73 | 3 | 0.049025 | 1.288809 | 26.288809 | 0 | 0 | 26.288809 | 0 | 0 | 2604100 | Customer 3 | 5678 |

## 1.2.3   Output (in working directory)

Taxation Reports        -  Compliance, non-compliance (as applicable) and non-billable (as applicable) custom sort reports located in the Report zip file.  **Examples: {output_filename_format}_ssf.csv, {output_filename_format}_nca.csv, {output_filename_format}_nba.csv**

**Note: {output_filename_format}** is defined in customsort.cfg.

Metrics Reports        -  Custom Sort report metrics located in the Report zip file.
**Example:  {output_filename_format}.rpt**

**Note: {output_filename_format}** is defined in customsort.cfg.

## 1.3 AFC SaaS Pro

### 1.3.1 Usage

AFC SaaS Pro provides the ability to dynamically generate a custom report containing the transactional data available in the database for a specified timeframe. The general process is as follows:

1. Invoke the **CreateReport** API in the web service. The **ReportOptions** parameter specifies which data to include in the report.
2. The report is processed in the background. The resulting output file is placed in the designated client FTP folder where it can be downloaded. This process takes anywhere from 30-90 minutes to complete.
3. Once the report has been generated and is ready for download, an email notification is sent to the email address(s) included in the **ReportOptions**.

**Note:** Prior to the first time executing the CreateReport API call, please notify communicationsupport@avalara.com. If not already established, an FTP account needs to be created and the FTP credentials provided.

Please refer to **TM_00116_AFC SaaS Pro Telecom Developer Manual** and **TM_00117_AFC SaaS Pro SAU Developer Manual** for further information.

## 2. Custom Sort Configuration Format/Options

**General Rules / Notes**

- Configuration file should be in standard text file format.

- You can use the slash-slash ("//") string to indicate a comment

- You must define, at a minimum, either the base format and/or fields to be reported.

- If you specify the tax data directory, you do not need a filelocs.txt.

- Fields will be sorted in the order they are listed in the configuration file.

## 2.1 Configuration Options

| Token | Description |
|---|---|
| OUTPUT_FILENAME_FORMAT | Format to be used for output / reports<br>Values:  Valid filename or supported pattern.  Default is EZTax.<br><br>EXAMPLE:<br>        OUTPUT_FILENAME_FORMAT: EZtax_{%y%m%d} |

| Token | Description |
|---|---|
| | <table><tr><th>Pattern</th><th>Desc</th><th>Example</th></tr><tr><td>%d</td><td>Day of the month (01-31)</td><td>19</td></tr><tr><td>%H</td><td>Hour in 24h format (00-23)</td><td>14</td></tr><tr><td>%I</td><td>Hour in 12h format (01-12)</td><td>05</td></tr><tr><td>%j</td><td>Day of the year (001-366)</td><td>231</td></tr><tr><td>%m</td><td>Month as a decimal number (01-12)</td><td>08</td></tr><tr><td>%M</td><td>Minute (00-59)</td><td>55</td></tr><tr><td>%p</td><td>AM or PM designation</td><td>PM</td></tr><tr><td>%S</td><td>Second (00-61)</td><td>02</td></tr><tr><td>%y</td><td>Year, last two digits (00-99)</td><td>01</td></tr><tr><td>%Y</td><td>Year</td><td>2012</td></tr></table> |
| BASE | The base format to be used.<br>Values (choose 1):  Default value in **BOLD**.<br>    **NONE**<br>    SRTCOMMA20L<br>    SRTCOMMA20L-P<br>    SRTCOMMA20LD<br>    EZLOGCUST<br>    EZLOGCUSTPTS<br><br>EXAMPLE:<br>    BASE:  SRTCOMMA20L |
| OPTION | User supplied option.<br>Values (choose 1 per line): Default values in **BOLD**.<br>    **NBA_FILE** \| DISCARD_NBA_RECS \| INCLUDE_NBA_RECS<br>    **NCA_FILE** \| DISCARD_NCA_RECS \| INCLUDE_NCA_RECS<br>    **NO_DELETE_LOG** \| DELETE_LOG<br>    NO_HEADER \| **HEADER**<br><br>EXAMPLE:<br>    OPTION:  NBA_FILE<br>    OPTION:  NCA_FILE<br>    OPTION:  NO_DELETE_LOG<br>    OPTION:  HEADER<br><br>**Note:**  Please be aware that **NO_DELETE_LOG** \| DELETE_LOG only applies to AFC License clients.  AFC SaaS Standard clients must set this option to NO_DELETE_LOG[3]. |
| ALGORITHM | Algorithm for calculating net taxable sale amount. .<br>Values (choose 1):  Default value in **BOLD**.<br>    **SRTCOMMA20L**<br>    SRTCOMMA20LD<br>    ALLOW_NEG_NET<br><br>EXAMPLE:<br>    ALGORITHM:  SRTCOMMA20L |
| CALCULATED_VALUE_PRECISION | Precision to be used in reports for calculated floating point.<br>Values:  0 – 6  (Default is 6) |

| Token | Description |
|---|---|
| | EXAMPLE:<br>    CALCULATED_VALUE_PRECISION: 2 |
| DEFAULT_EXT | Precision to be used in reports for calculated floating point.<br>Values:  valid file alpha numeric extension.  Default is ssf.<br><br>EXAMPLE:<br>    DEFAULT_EXT: ssf<br><br>**Note:**  Please be aware that this default value only applies to AFC License clients.  AFC SaaS Standard clients must use CSV file format[3]. |
| DATA_DIR | Directory specify where the EZtax data resides.<br>If this value is not set, then the file **filelocs.txt** must exist.<br>VALUES:  valid directory specification.  There is no default.<br><br>EXAMPLE (windows):<br>    DATA_DIR: C:\BillSoft\EZTax\Data<br><br>EXAMPLE (unix/linux):<br>    DATA_DIR: /home/EZtax/install/db |
| WORKING_DIR | Working directory for custom sort.<br>VALUES:  valid directory specification.  There is no default.<br><br>EXAMPLE (windows):<br>    WORKING _DIR: E:\BillingApp\Working<br><br>EXAMPLE (unix/linux):<br>    DATA_DIR: /home/BillingApp/Working |

## 2.2    Configuration Fields for Sorting/Reporting

| Token | Description |
|---|---|
| FIELD or NORPT | Usage of FIELD will be used both in the sort and the report output.  Specifying NORPT will use the field in the sort be exclude it from the report. |

| Values | Description |
|---|---|
| P_CODE | Jurisdiction code used by EZtax (numeric) |
| ADDRESS | Country, State, County, Locality (alpha). Sort will be on PCode value. |
| TRANS_TYPE[1] | Transaction type (numeric) |
| SRV_TYPE[1] | Service Type (numeric) |
| TAX_TYPE | Tax Type (numeric) |
| TAX_TYPE_DESC | Tax Type Description (alpha).  Sort will be on numeric value. |
| TAX_CATEGORY | Tax Category (numeric) |
| TAX_CATEGORY_DESC | Tax Category Description (alpha).  Sort will be on numeric value. |
| TAX_LEVEL | Tax Level (numeric) |

| Values | Description |
|---|---|
| TAX_LEVEL_DESC | Tax Level Description (alpha).  Sort will be on numeric value. |
| TAX | Tax Rate (numeric) |
| TAX_AMOUNT | Tax Amount (numeric) |
| SALE_AMT | Sale Amount (numeric) |
| EXEMPT_SALE_AMT | Exempt Sale Amount (numeric) |
| REFUND_UNCOLLECT | Adjustment (numeric) |
| NET_TAXABLE | Net Taxable Amount (numeric) |
| MINUTES | Minutes (numeric) |
| INV_NO | Invoice Number (numeric) |
| SRV_LVL_NO | Service Level Number (numeric) |
| OPTIONAL | Optional Field (numeric) |
| LINES | Lines (numeric) |
| LOCATIONS | Locations (numeric) |
| CALC_TYPE | Calculation Type (numeric) |
| CALC_TYPE_DESC | Calculation Type Description (alpha). Sort will be on numeric value. |
| BILLABLE | Tax is Billable Flag (numeric: 1=True, 0=False) |
| COMPLIANCE | Whether tax should be filed or retained (numeric: 1=True, 0=False) |
| CUST_NO | Customer Number (alpha – max 20 bytes) |
| ADJ_TYPE | Adjustment Type (numeric) |
| ADJ_TYPE_DESC | Adjustment Type Description (alpha). Sort will be on numeric value. |
| EXEMPT_TYPE | Exemption Type (numeric) |
| EXEMPT_TYPE_DESC | Exemption Type Description (alpha). Sort will be on numeric value. |
| SURCHARGE_FLAG | Surcharge Flag (numeric: 1=True, 0=False) |
| LOG_COUNTER | Log Counter  (numeric) |
| OPT_ALPHA_1[2] | Optional Field (alpha) |
| COMPANY_IDENTIFIER[2] | Company Identifier (alpha) |
| OPT_4[2] | Optional 4 (numeric) |
| OPT_5[2] | Optional 5 (numeric) |
| OPT_6[2] | Optional 6 (numeric) |
| OPT_7[2] | Optional 7 (numeric) |
| OPT_8[2] | Optional 8 (numeric) |
| OPT_9[2] | Optional 9 (numeric) |
| OPT_10[2] | Optional 10 (numeric) |

[1] Only can be used if configuration option [logtransserv=true] is set.  AFC SaaS Standard clients must contact communicationsupport@avalara.com for assistance with configuration options.

[2] Only can be used if configuration option [loglength=long] is set. AFC SaaS Standard clients must contact communicationsupport@avalara.com for assistance with configuration options.

[3] AFC SaaS Standard clients with a persisted customsort.cfg file must contact communicationsupport@avalara.com for assistance with configuration options.

## 3. Appendix A – Samples

For further information on the base format samples provided within this section, please reference the documents identified in the table below.

| Base Format | Document Name |
|---|---|
| srtcomma20l | TM_00523_srtcomma20l.pdf |
| srtcomma20ld | TM_00524_srtcomma20ld.pdf |
| ezlogcust | TM_00513_ezlogcust.pdf |
| ezlogcustpts | TM_00515_ezlogcustpts.pdf |

**Note:** These additional documents are located in the monthly distribution package.

### 3.1 Sample Configuration Files

#### 3.1.1 Base Format: srtcomma20l

Example that will produce ssf/nba/nca in the same format as srtcomma20l utility.

```
//////////////////////////////////////////////////////////////////////////////
////  base_srtcomma20l.cfg  ////
OUTPUT_FILENAME_FORMAT: EZtax_{%y%m%d}
BASE: srtcomma20l
OPTION: NBA_FILE
OPTION: NCA_FILE
OPTION: NO_DELETE_LOG
OPTION: NO_HEADER
CALCULATED_VALUE_PRECISION: 6
DEFAULT_EXT: ssf
DELIMITER: ','
DATA_DIR: C:\BillSoft\EZTax\Data
WORKING_DIR: E:\Logs\customsort
```

#### 3.1.2 Base Extended Format: srtcomma20l

Example that will produce ssf/nba/nca similar to srtcomma20l, but with the jurisdiction Address, Company Identifier and Invoice Number added to the report, and a column header row added. Additional, all calculated values will be rounded to 2 decimal places.

```
//////////////////////////////////////////////////////////////////////////////
////  ext_srtcomma20l.cfg  ////
OUTPUT_FILENAME_FORMAT: EZtax_{%y%m%d}
BASE: srtcomma20l
FIELD: ADDRESS
```

```
FIELD: COMPANY_IDENTIFIER
FIELD: INV_NO
OPTION: NBA_FILE
OPTION: NCA_FILE
OPTION: NO_DELETE_LOG
OPTION: HEADER
CALCULATED_VALUE_PRECISION: 2
DEFAULT_EXT: ssf
DELIMITER: ','
DATA_DIR: C:\BillSoft\EZTax\Data
WORKING_DIR: E:\Logs\customsort
```

### 3.1.3 Base Format: srtcomma20l-p

Example that will produce ssf/nba/nca in the same format as srtcomma20l with the -p cmd line option.

```
////////////////////////////////////////////////////////////////////////////////
////  base_srtcomma20l_p.cfg  ////
OUTPUT_FILENAME_FORMAT: EZtax_{%y%m%d}
BASE: srtcomma20l-p
OPTION: NBA_FILE
OPTION: NCA_FILE
OPTION: NO_DELETE_LOG
OPTION: NO_HEADER
CALCULATED_VALUE_PRECISION: 6
DEFAULT_EXT: ssf
DELIMITER: ','
DATA_DIR: C:\BillSoft\EZTax\Data
WORKING_DIR: E:\Logs\customsort
```

### 3.1.4 Extended Format: srtcomma20l-p

Example that will produce ssf/nba/nca similar to srtcomma20l with the –p cmd line option, but with Pcode, Company Identifier and Invoice Number added to the report, and a column header row added. Additional, all calculated values will be rounded to 2 decimal places.

```
////////////////////////////////////////////////////////////////////////////////
////  ext_srtcomma20l_p.cfg  ////
OUTPUT_FILENAME_FORMAT: EZtax_{%y%m%d}
BASE: srtcomma20l
FIELD: P_CODE
FIELD: COMPANY_IDENTIFIER
FIELD: INV_NO
OPTION: NBA_FILE
OPTION: NCA_FILE
OPTION: NO_DELETE_LOG
OPTION: HEADER
CALCULATED_VALUE_PRECISION: 2
DEFAULT_EXT: ssf
DELIMITER: ','
DATA_DIR: C:\BillSoft\EZTax\Data
WORKING_DIR: E:\Logs\customsort
```

### 3.1.5 Base Format: srtcomma20ld

Example that will produce ssf/nba/nca in the same format as the srtcomma20ld utility.

```
//////////////////////////////////////////////////////////////////////////////
OUTPUT_FILENAME_FORMAT: EZtax_{%y%m%d}
BASE: srtcomma20ld
OPTION: NBA_FILE
OPTION: NCA_FILE
OPTION: NO_DELETE_LOG
OPTION: NO_HEADER
CALCULATED_VALUE_PRECISION: 6
DEFAULT_EXT: ssf
DELIMITER: ','
DATA_DIR: C:\BillSoft\EZTax\Data
WORKING_DIR: E:\Logs\customsort
```

### 3.1.6 Base Format: ezlogcust

Example that will produce reports in the same format as the ezlogcust utility.

```
//////////////////////////////////////////////////////////////////////////////
OUTPUT_FILENAME_FORMAT: EZtax_{%y%m%d}
BASE: ezlogcust
OPTION: NBA_FILE
OPTION: NCA_FILE
OPTION: NO_DELETE_LOG
OPTION: NO_HEADER
CALCULATED_VALUE_PRECISION: 6
DEFAULT_EXT: rpt
DELIMITER: ','
DATA_DIR: C:\BillSoft\EZTax\Data
WORKING_DIR: E:\Logs\customsort
```

### 3.1.7 Base Format: ezlogcustpts

Example that will produce reports in the same format as the ezlogcustpts utility.

```
//////////////////////////////////////////////////////////////////////////////
OUTPUT_FILENAME_FORMAT: EZtax_{%y%m%d}
BASE: ezlogcustpts
OPTION: NBA_FILE
OPTION: NCA_FILE
OPTION: NO_DELETE_LOG
OPTION: NO_HEADER
CALCULATED_VALUE_PRECISION: 6
DEFAULT_EXT: rpt
DELIMITER: ','
DATA_DIR: C:\BillSoft\EZTax\Data
WORKING_DIR: E:\Logs\customsort
```

### 3.1.8   Fully Defined Format:  srtcomma20l-p

Example of a fully defined configuration file that will produce reports in the format of srtcomma20l with the -p cmd line option.  Similar to srtcomma20l, this sample uses filelocs.txt and deletes the log when complete.

```
//////////////////////////////////////////////////////////////////////////////
////  srtcomma20l_p.cfg ////
OUTPUT_FILENAME_FORMAT: EZtax_{%y%m%d}
BASE: none
FIELD: ADDRESS
FIELD: TAX_TYPE
FIELD: TAX_LEVEL
FIELD: TAX
FIELD: TAX_AMOUNT
FIELD: SALE_AMT
FIELD: EXEMPT_SALE_AMT
FIELD: REFUND_UNCOLLECT
FIELD: NET_TAXABLE
FIELD: MINUTES
FIELD: LINES
NORPT: BILLABLE
OPTION: NBA_FILE
OPTION: NCA_FILE
OPTION: DELETE_LOG
OPTION: NO_HEADER
CALCULATED_VALUE_PRECISION: 6
DEFAULT_EXT: ssf
DELIMITER: ','
```

### 3.1.9   Fully Define Format:  ezlogcust

Example of a fully defined configuration file that will produce reports in the format of ezlogcust.  Similar to ezlogcust, this sample uses filelocs.txt and deletes the log when complete.

Note that CUST_NO leads off the list as a NORPT and appears again at the end of the list as a FIELD.  This is to mimic the ezlogcust functionality that used the customer number as the first item in the sort, but output it as the last column in the report.

```
//////////////////////////////////////////////////////////////////////////////
////  ezlogcust.cfg ////
OUTPUT_FILENAME_FORMAT: EZtax_{%y%m%d}
BASE: none
NORPT: CUST_NO
FIELD: ADDRESS
FIELD: TAX_TYPE
FIELD: TAX_LEVEL
FIELD: TAX
FIELD: CALC_TYPE_DESC
FIELD: TAX_AMOUNT
FIELD: SALE_AMT
FIELD: EXEMPT_SALE_AMT
FIELD: REFUND_UNCOLLECT
```

```
FIELD: NET_TAXABLE
FIELD: MINUTES
FIELD: LINES
FIELD: LOCATIONS
NORPT: BILLABLE
FIELD: CUST_NO
OPTION: NBA_FILE
OPTION: NCA_FILE
OPTION: NO_DELETE_LOG
OPTION: NO_HEADER
CALCULATED_VALUE_PRECISION: 6
DEFAULT_EXT: rpt
DELIMITER: ','
```