

Taxable / Non-Taxable Sales

Last Modified on 01/18/2023 5:25 pm EST

The Taxable/Non-Taxable Sales by Tax Group Report generates a listing of sales tax from invoices and credit memos totaled by Tax Group within the period of time selected for the report.

This report has a branch option; if multiple branches are selected, a new report will print for each unique branch.

Once the desired options have been selected on the report options form, click the OK button to display the report in Print Preview mode.

Report Selections

Branch - The default is to display data for All Branches. If the data for only certain Branches is desired, you may highlight the first Branch, then depress the CTRL key and highlight additional Branches within the list.

- *Hide Inactive Branches* - If data is not to be listed for inactive Branches, select this option.

- *Show Each Branch* - If this option is selected, a new page will begin with each unique Branch. Totals are printed after all data is printed for a Branch. The last page of the report will print Totals by Branch and a Grand Total for all Branches.

Sales Date - This option will default to the Current Accounting period. If a different Accounting Period or specific Date range is desired, select either the *Accounting Period* option or *Dates* option. Once an option is selected, the User must select an Accounting Period range or Date range.

Options

- *Stepped Layout* - Selecting this option will print the Tax Group on the first line of data for each unique Tax Group.

- *Block Layout* - Selecting this option will print the Tax Group on each line of the report. This is typically selected if it is needed to export the report to Excel for easier sorting and grouping.

- *Roll-up Tax Tables* - If a Tax Group is comprised of multiple tax tables, when this option is selected, the report will provide totals for each Tax Group by Item Type.

- *Show Tax Group Subtotals* - If this option is selected, a subtotal will be printed for each Tax Group on the report.

- *Show Item Subtotals* - Selecting this option will print a subtotal for each Item Type within each Tax Group.

Tax Table - The default is to print all paid invoices on the report within the options selected above. By selecting one or multiple Tax Tables, only the paid invoices associated with the selected Tax Tables will display on the report.

Tax Group - The default is to print all paid invoices on the report within the options selected above. By selecting one or multiple Tax Groups, only the paid invoices associated with the selected Tax Groups will display on the report.

Tax Agency - The default is to print all paid invoices on the report within the options selected above. By selecting one or multiple Tax Agencies, only the paid invoices associated with the selected Tax Agencies will display on the report.

Tableable/Non-Taxable Sales by Tax Group [X]

Branch

- All
- A1
- Michigan
- National Accounts
- Dhio

Hide Inactive Branches
 Show Each Branch

Sales Date

Accounting Period Dates

10 10/1/2017 - 10/31/2017 []
10 10/1/2017 - 10/31/2017 []

Options

Stepped Layout Roll-up Tax Tables
 Block Layout Show Tax Group Subtotals
 Show Item Subtotals

Tax Table

- 87542
- 1st 5000
- AL State
- AL-Phenix City Local
- CA State
- CA-Irvine

Hide Inactive Tax Table

Select All Invert Selection

Tax Group

- 87542
- 5000 Club
- AL State
- AL-Phenix City
- BCTAX
- CA-Irvine

Hide Inactive Tax Group

Select All Invert Selection

Tax Agency

- MI Treasurer
- OH Comptroller
- Other State

Hide Inactive Tax Agency

Select All Invert Selection

Ok Cancel