Store Item Tax Report

Last Modified on 11/03/2020 12:33 am EST

The **Store Item Tax Report** displays a report of total sales on items.

Go to the **Modules** (menu) > **Store** > **Find a Report** > **Store Item Tax.** From the *Report Type* drop-down, select **Item Tax**.

- * Evaluate net sales for a selected time period.
- Report on sales tax for a given month.
- * Analyze discounts given on merchandise.

Business Scenario

Your accountant would like to know how much sales tax you collected for the previous month (e.g., April 2019). Run the Store Item Tax Report using the *Date Paid From* as **4/1/19** and *Through* as **4/30/19**. Export the report to Excel and save. You can then email your accountant with the report attached.

Search Criteria

Use the Search Criteria to narrow the report results:

- If you have multiple locations in your database, you have the option to look at items based on the location of where the item was sold using the *Location* drop-down.
- Choose additional information you would like to filter the results by such as Vendor, Category 1, Transaction Date, etc.



Leaving a criteria selection blank is the same as saying 'all'.

Store Reports ← RETURN **✓** SUBMIT Search Point of Sale data using the criteria below Report Type: * Item Tax ▼ ? The criteria will return Location: • all items sold between Item #/Name: Item Search 4/1/19 and 4/30/19. Item Status: • Vendor: Store Name: ▼ Store Status: Family Name: Family Search Family Status: Category 1: Transaction Type: ▼ Transaction Sub Type: Transaction Date From: 4/1/2019 iii Through: 4/30/2019 Date Paid From: mm/dd/yyyy iii Through: mm/dd/yyyy iii ? Returns Only:

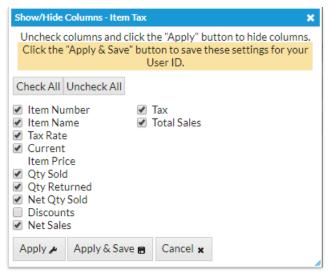
Report Results





The Sales Tax comes from the actual tax from each transaction. If the tax was edited in a transaction, it is possible it may not calculate to be the same as the default tax rate multiplied by the total item price.

• The **Show/hide Columns** button allows you to customize your report by selecting which information to display.



- Select **Apply** to have these selections applied to only the report you are currently viewing.
- Select Apply & Save to have these selections applied and saved to your User ID. When logged in as your User ID, you will see only the columns of information you chose previously.
 Other Users will see the columns they selected and saved, which may differ from yours.
- Use **Restore Column**s to view all available columns.



Save this as a frequently used report! Click the heart (icon) next to a report name, the heart will change to red and the report will be listed under the *Reports* (menu) > My Reports for quick and easy access!