

Sales Tax Report

Last Modified on 04/20/2022 4:53 pm EDT

The Sales Tax Report generates a listing of sales tax calculated on invoices and credit memos within the date range selected for the report. This report has a branch option where the user may select one, multiple, or all branches.

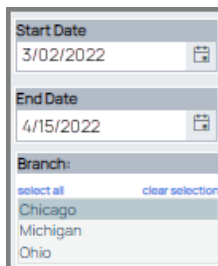
The report groups the data by each unique tax code, with a secondary sort on the customer number.

Columns in the report display taxable sales, non-taxable sales, and the amount of tax from the invoice or credit. Subtotals are displayed for each tax code, and grand totals are displayed on the last page of the report.

Report Parameters

The parameters available for this report are:

- Start and End Date
- Branch

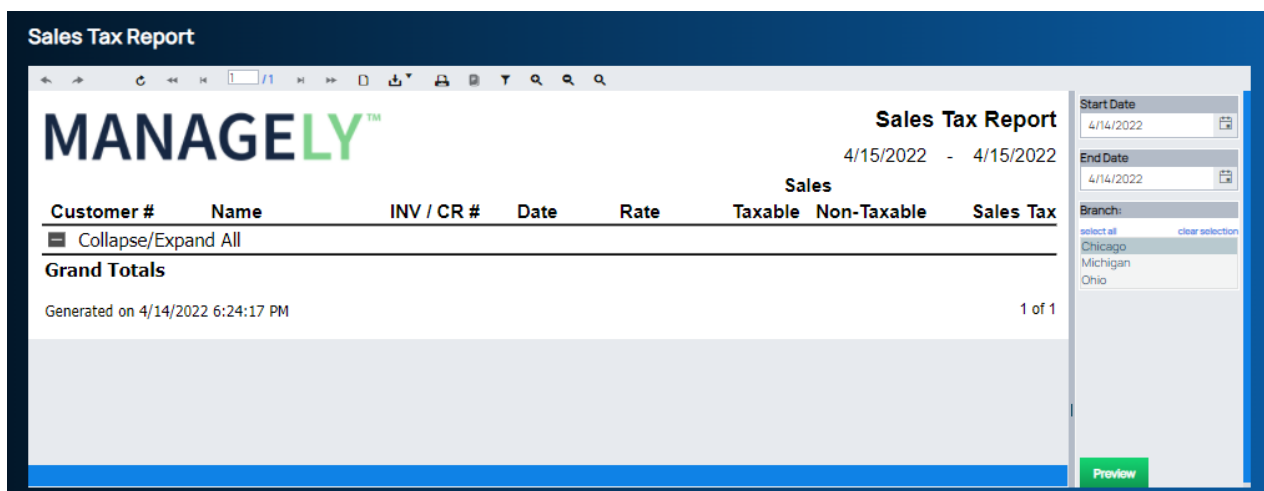


The screenshot shows a form with three sections: 'Start Date' with a date picker set to 3/02/2022, 'End Date' with a date picker set to 4/15/2022, and 'Branch:' with a list of options: 'select all', 'clear selection', 'Chicago', 'Michigan', and 'Ohio'.

Generate the Sales Tax Report

To generate this report, navigate to Reports > Accounting > Sales Tax Report.

The Sales Tax Report page is displayed. In the Parameters area, make the desired selections. When finished, click on the Preview button.



The screenshot shows the 'Sales Tax Report' interface. At the top, it displays the 'MANAGELY™' logo and the report title 'Sales Tax Report' for the period '4/15/2022 - 4/15/2022'. Below this is a table with columns: 'Customer #', 'Name', 'INV / CR #', 'Date', 'Rate', 'Sales Taxable', 'Non-Taxable', and 'Sales Tax'. A 'Collapse/Expand All' button is located below the table headers. The 'Grand Totals' section is currently empty. At the bottom left, it says 'Generated on 4/14/2022 6:24:17 PM' and '1 of 1' at the bottom right. On the right side, there is a parameter selection panel with 'Start Date' (4/14/2022), 'End Date' (4/14/2022), and 'Branch:' (select all, clear selection, Chicago, Michigan, Ohio). A green 'Preview' button is at the bottom right of the panel.

The report results are based upon the selections in the parameters area. Users may use the function buttons to print or export the report.

Sales Tax Report

MANAGELY™

Sales Tax Report

3/2/2022 - 4/15/2022

Customer #	Name	INV / CR #	Date	Rate	Sales		Sales Tax
					Taxable	Non-Taxable	
<input type="checkbox"/> Collapse/Expand All							
<input checked="" type="checkbox"/> GC: Geauga							
1028	Travis Papay	21438	03/03/22	6.5550%	11,475.71	0.00	752.23
1029	Bill Donoson	207	03/29/22	6.5550%	105.00	0.00	6.88
1029	Bill Donoson	213	03/29/22	6.5550%	230.00	0.00	15.08
1029	Bill Donoson	233	04/03/22	6.5550%	581.22	5.00	38.10
1029	Bill Donoson	235	04/03/22	6.5550%	75.00	0.00	4.92
1035	Roger Waters	211	03/29/22	6.5550%	60.00	0.00	3.93
1035	Roger Waters	231	04/03/22	6.5550%	85.00	0.00	5.57
1044	Justin Adams	21453	03/25/22	6.5550%	477.50	0.00	31.30
1044	Justin Adams	21455	03/25/22	6.5550%	35.00	0.00	2.29
1240	Jerry Wazny	21456	03/25/22	6.5550%	0.00	3.03	0.00
1240	Jerry Wazny	21458	03/25/22	6.5550%	0.00	3.03	0.00
1240	Jerry Wazny	21460	03/25/22	6.5550%	0.00	3.03	0.00
3438	Alice Aacott	215	03/29/22	6.5550%	85.00	0.00	5.57
3452	AB Customer 1	237	04/08/22	6.5550%	137.50	0.00	9.01